What is
Activity History
Connector?

If organizations have multiple Leadsquared accounts to manage leads, the Activity History connector helps sales users in fetching the activity history of leads from one LeadSquared account and display on the Lead Details page of the other LeadSquared account. The connector generates App URL which can be embedded in LeadSquared account (using Custom Tab Connector) or any third-party mobile or web application.

Benefits

Productivity

instead of toggling between different accounts, sales users can view activity history of leads in the same account.

Insights

This gives an insight to the sales user on how the lead is engaged and how they can communicate better with the lead.

Product Roadmap

Beta Release
July 20, 2021

Stand alone app was released.

Current Release

Activity History Connector is released.

Activity History tabs are created using Custom Tab connector.

Future Release

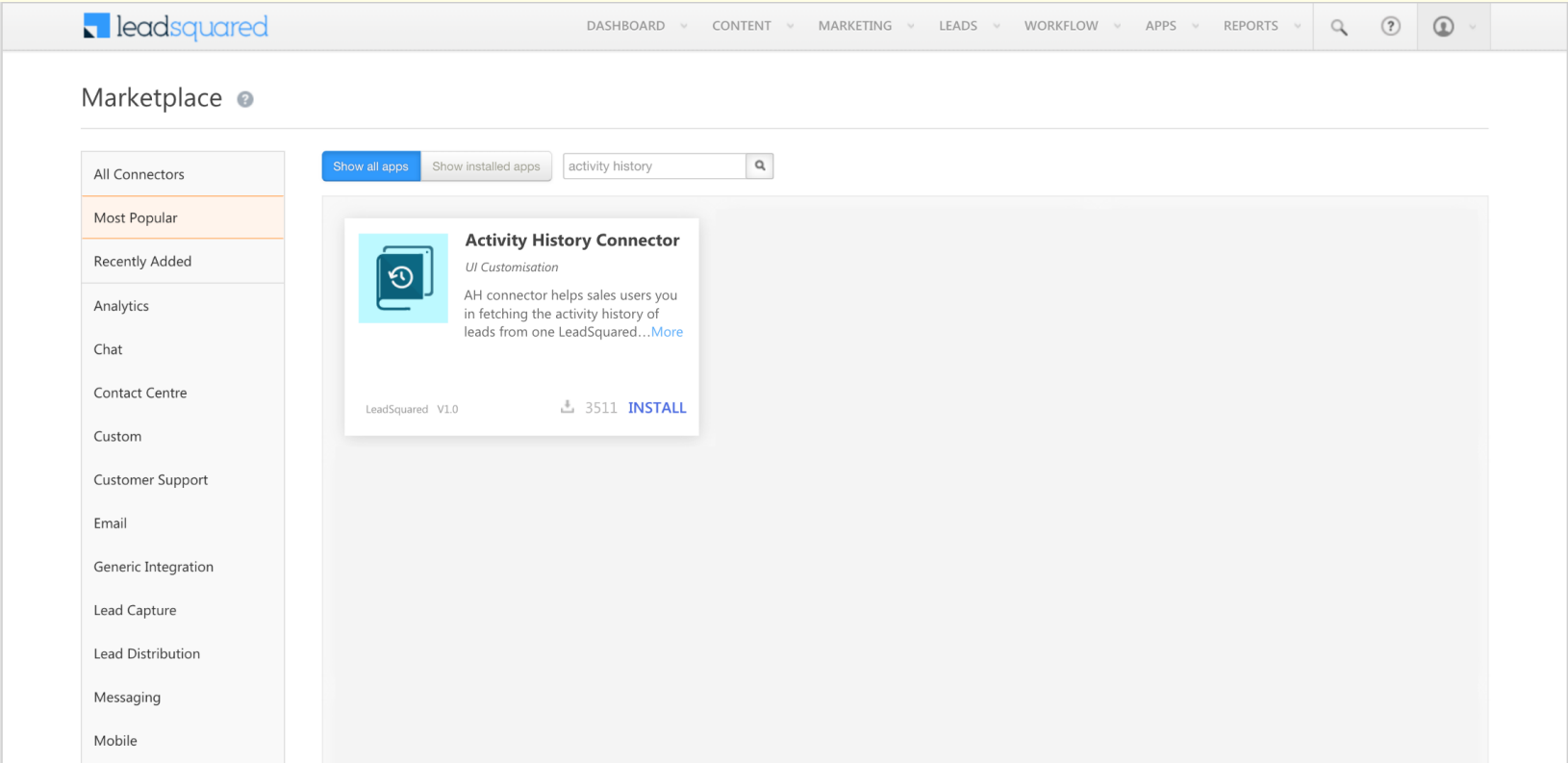Activity History tabs will be created using the Activity History connector.

Pre-requisite

- You must be the Administrator of your LeadSquared account to install and configure this connector.

- You must have Custom Tab connector installed on the Leadsquared account where you want to view the activity history.

- This is a paid feature. To enable it on your account, please reach out to your account manager, or write to support@leadsquared.com.
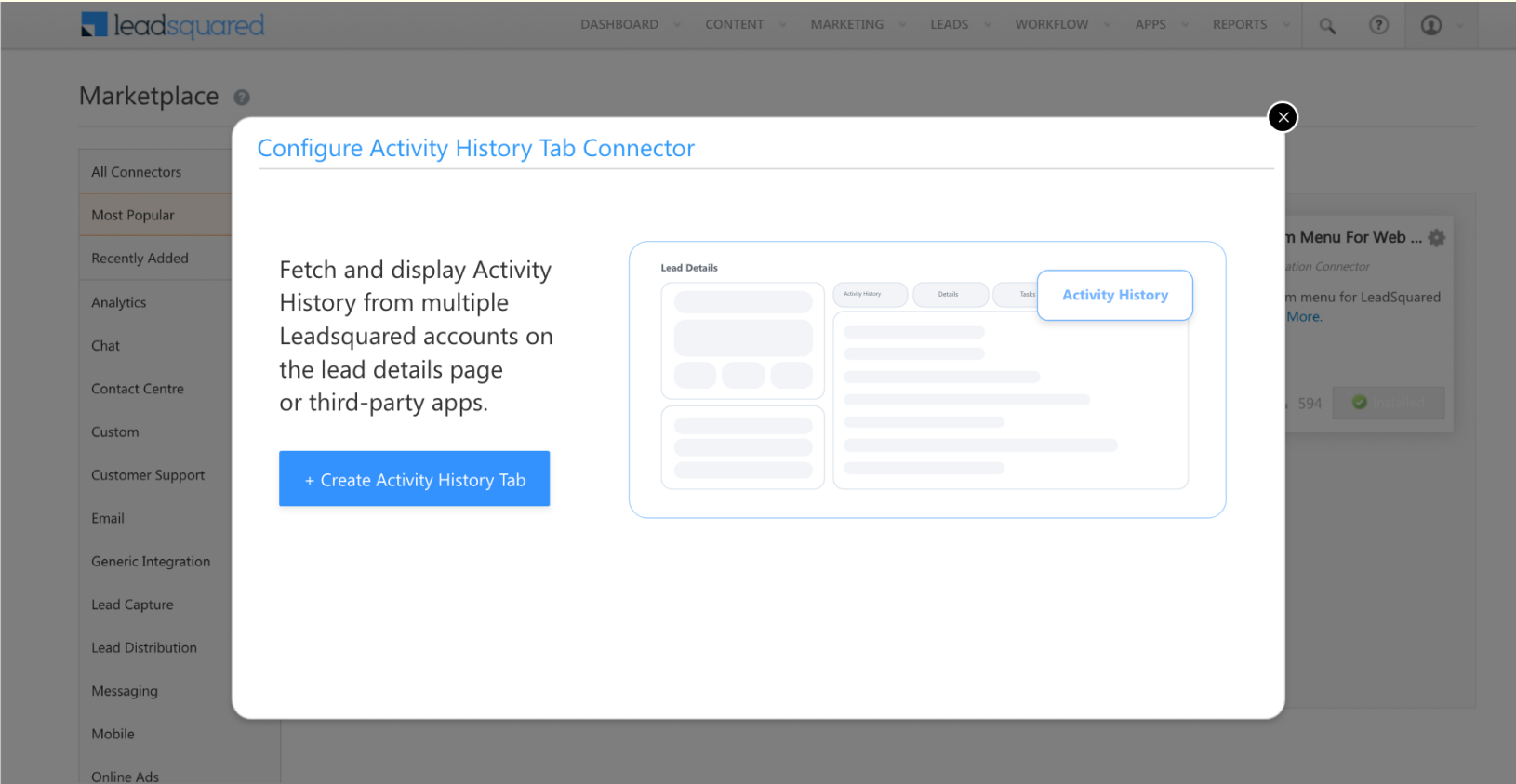
How to Set Up?

- From the main menu, navigate to **Apps>Apps Marketplace**.

- Search for Activity History, and click on Install.

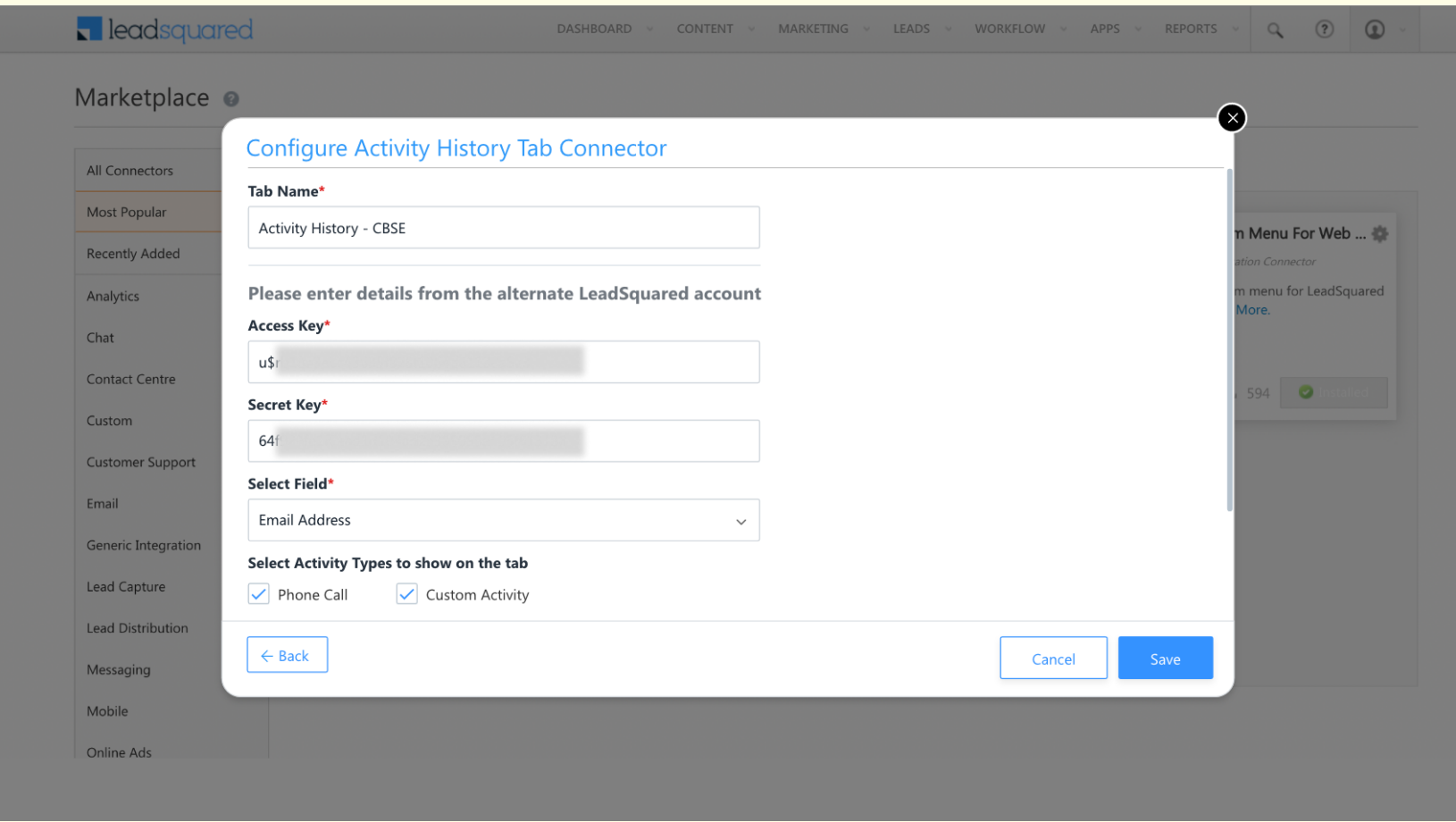- Alternatively, you can find the connector on the left panel, under UI Customization.

- Actions menu will have following options Configure, Enable and Remove.

- Click on Configure button and click on Create Activity History Tab.

Create Activity History Tab

- Enter tab name.
- Enter Access/Secret Key of the alternate account.
- Select the field from the other account. The dropdown will contain Email and Phone Number.
- Select the activity types (Phone Call and Custom activities) that will be visible to the sales user.
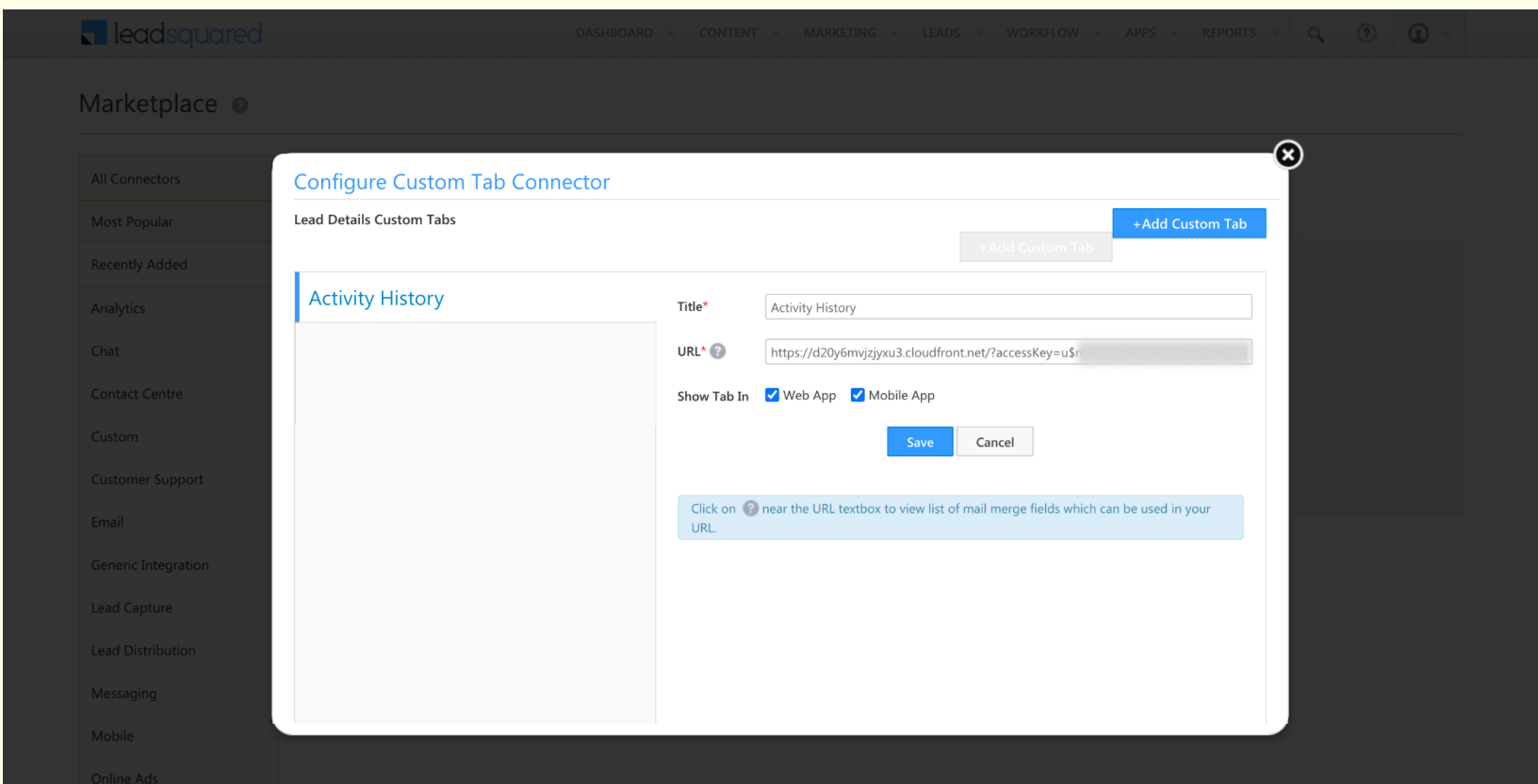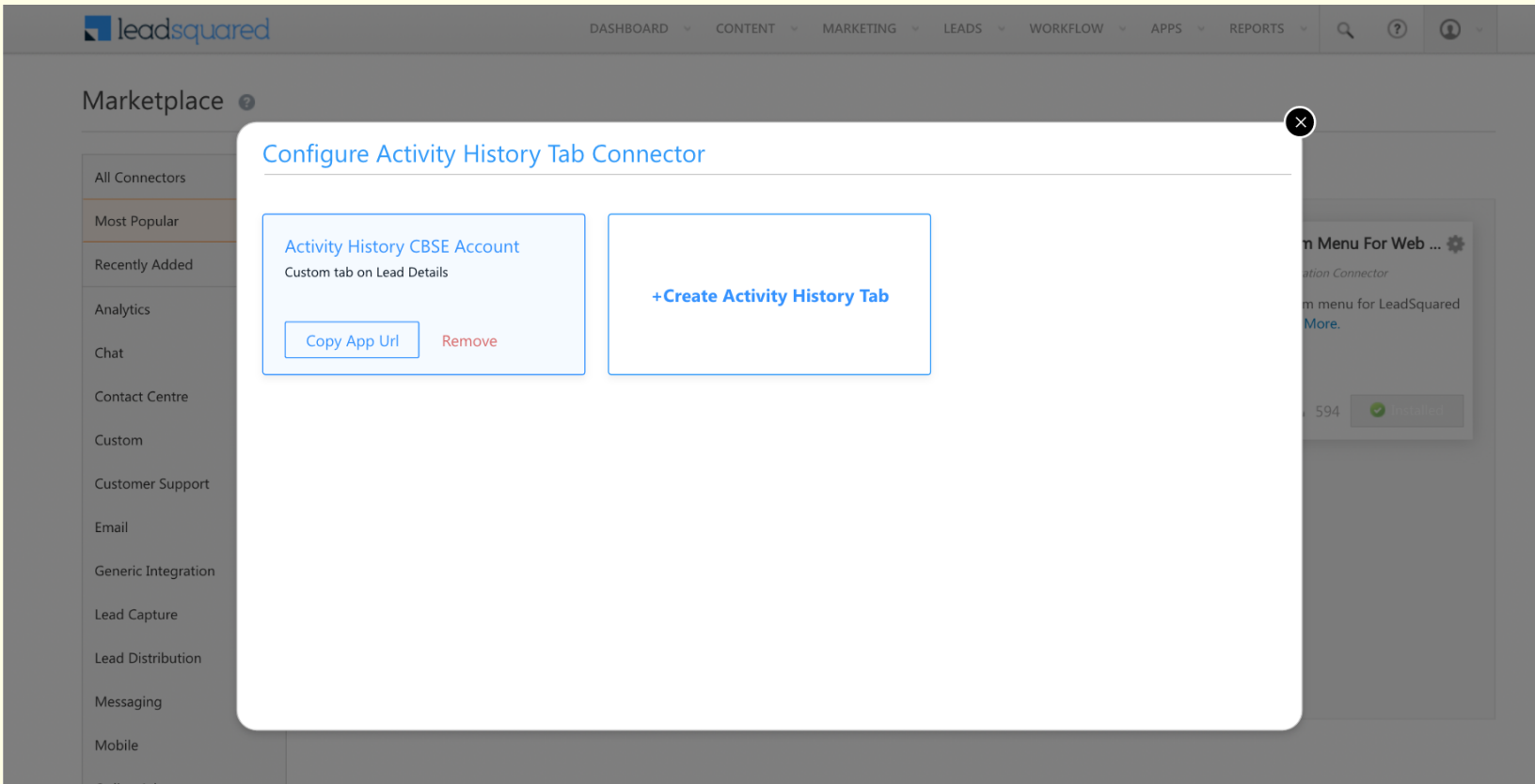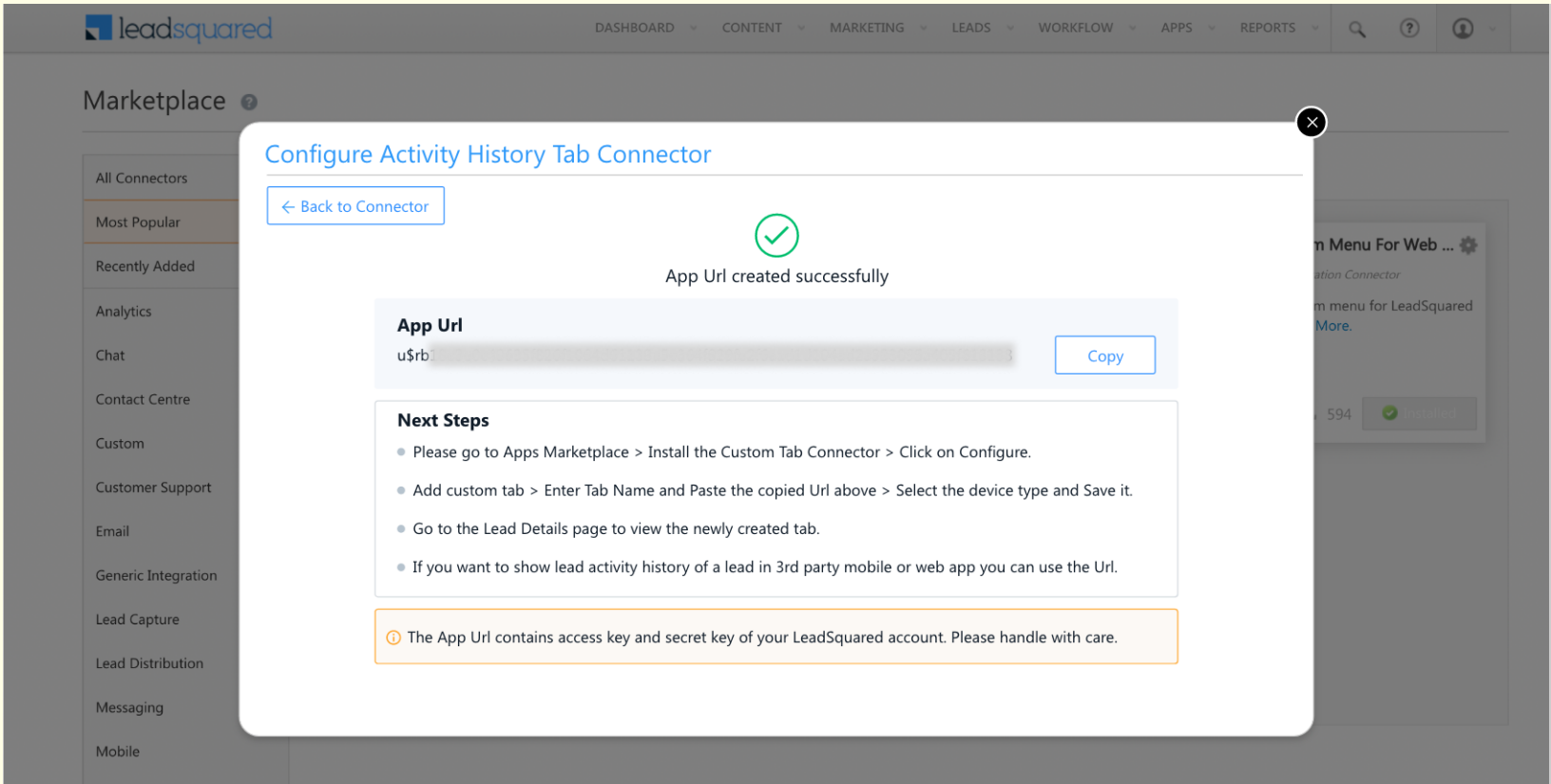- Click on Save.

- After saving the details App URL will be generated and instructions for next steps will be provided to the user.

- Since the App URL contains Access Key and Secret Key of your Leadsquared account, so it should be handled with care.

- If your organisation has multiple Leadsquared accounts, you can create multiple activity history tabs.

- In case there is a requirement to show the lead activity history of a lead in 3rd party mobile or web app Admin can use App URL.
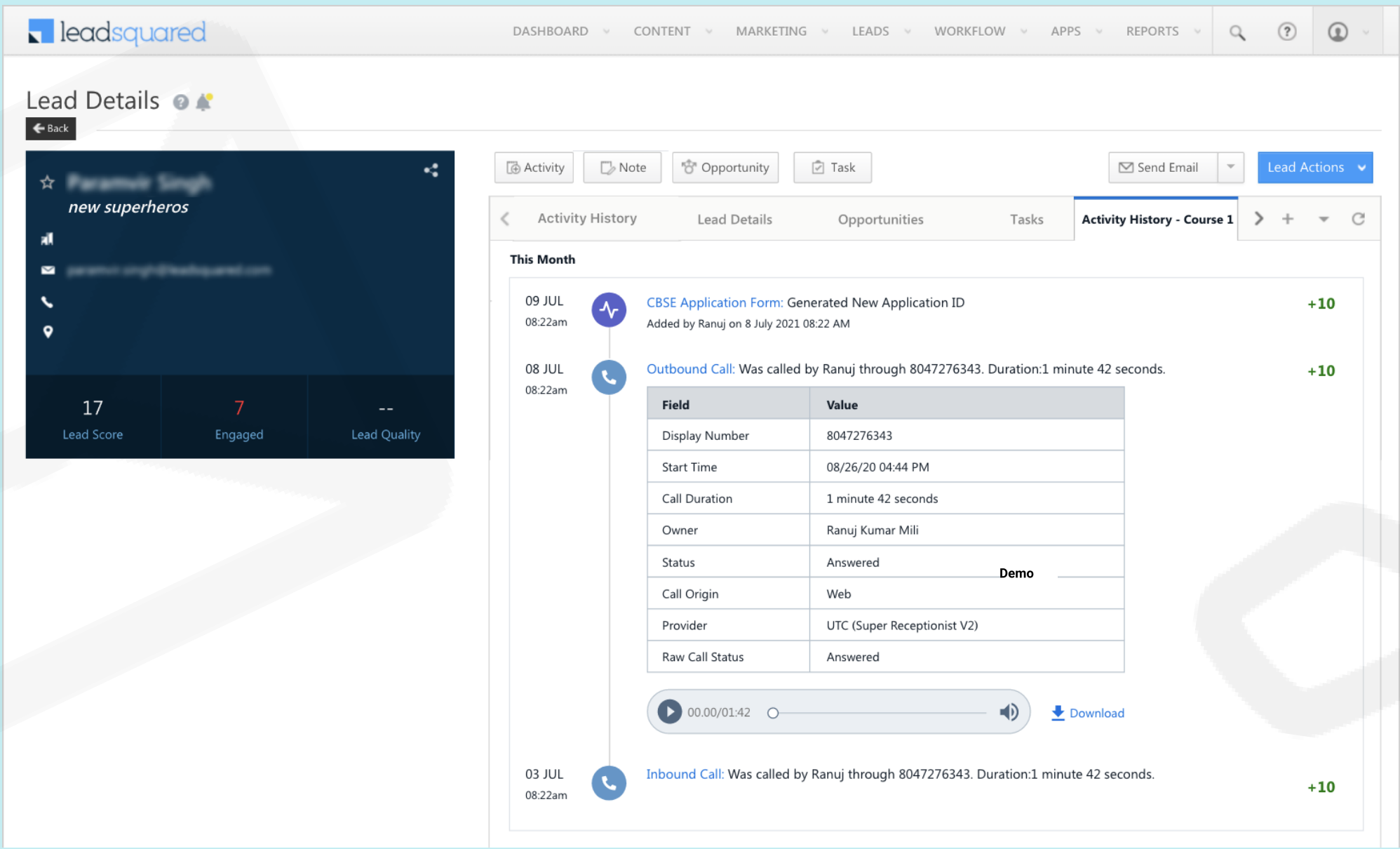
- Admin can remove the tabs whenever its necessary.

Create Custom Tab using Custom Tab Connector

- Please go to Apps Marketplace > Install the Custom Tab Connector > Click on Configure.

- Add Custom Tab > Enter Tab Name and paste the copied URL above > Select the device type and Save it.

- Go to the Lead Details page to view the newly created tab.

View Activity History Tab on Lead Details Page

Sales Users can go to Lead Details to view the activity history of the same Lead from alternate LeadSquared accounts.

Thank you !

For a detailed documentation about the product, please visit : https://help.leadsquared.com/activity-history-connector/

Need help? Get in touch with LeadSquared's support. Mail us at support@leadsquared.com