LeadSpark User Guide

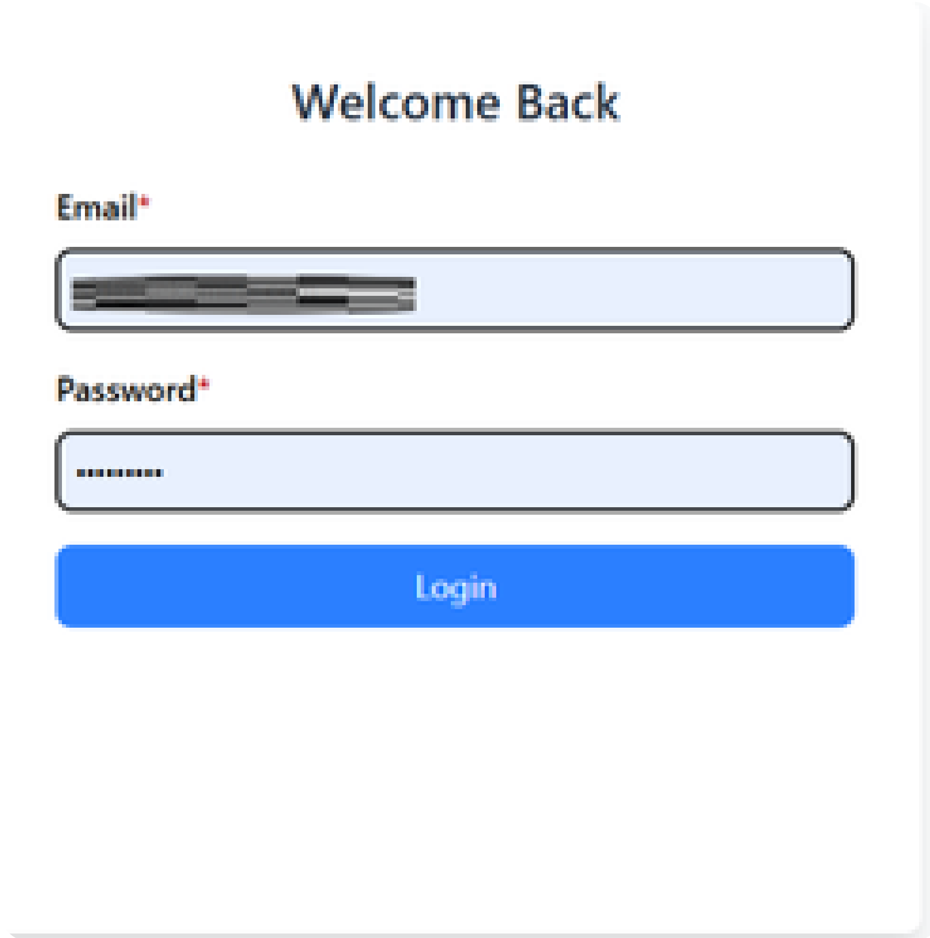
Thiscomprehensiveguidewillhelp you understand howto effectively use LeadSpark CRM as an **Admin** or **Staff Member**.Each module is explained step by step with clear instructions to maximize your productivity and lead management capabilities.

Login Screen

Getting Started

Begin your LeadSpark journey by accessing the secure login portal. The authentication process is straightforward and designed for quick access to your CRM dashboard.

- Open the LeadSpark login page in your web browser
- Enter your **Username/Email** in the designated field
- Input your secure **Password**
- Click the **Login** button to authenticate



After successful authentication, you will be automatically redirected to your personalized **Dashboard**. The interface you see will vary based on your role permissions - Admin or Staff Member.

User Management

Admin-Only Module

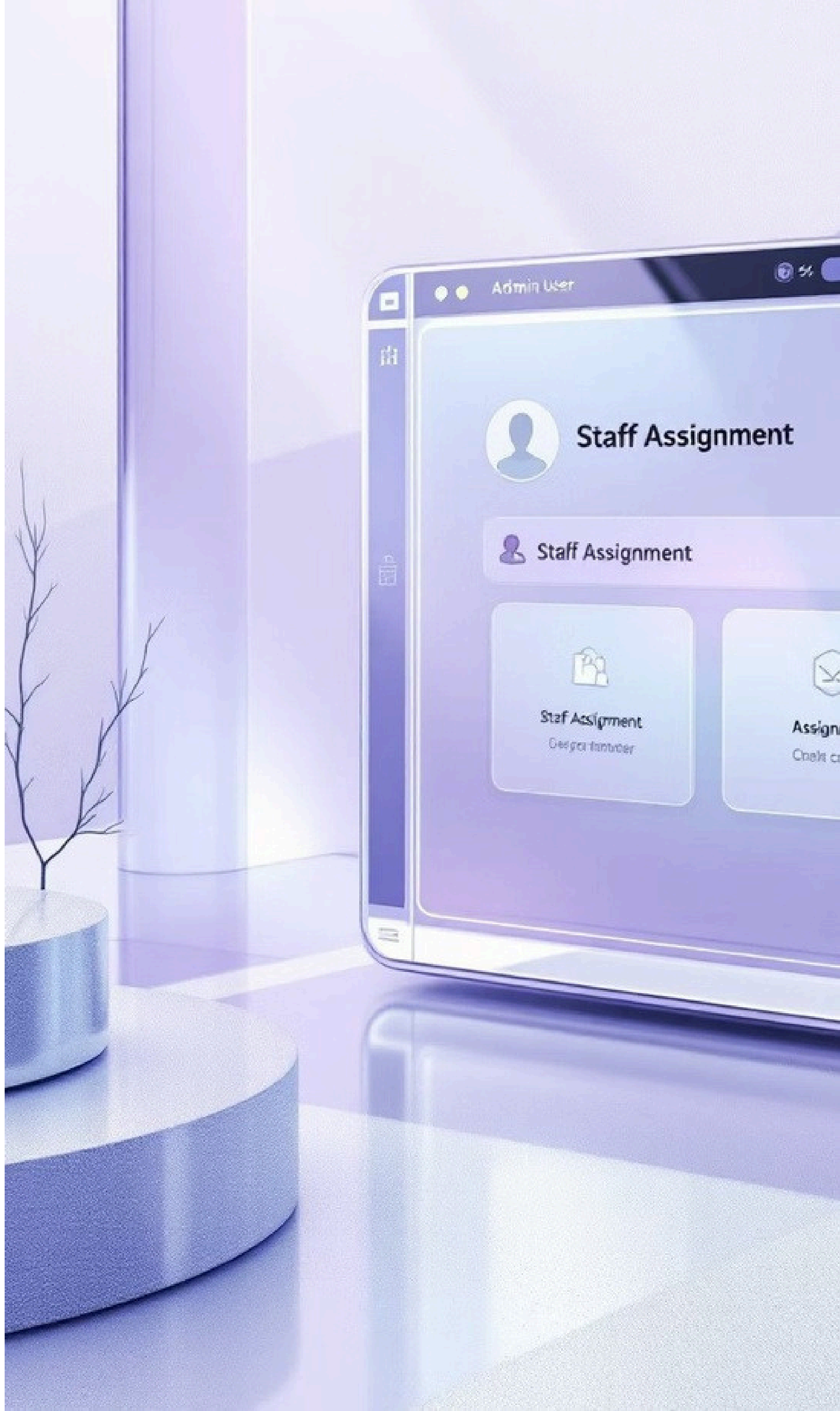
The User Management module is exclusively available to **Administrators** and provides complete control over team management and campaign assignments. This powerful feature ensures proper access control and workflow organization.

Core Capabilities

- Add and manage **Staff Members** for your company
- Control user account permissions and settings
- Assign specific campaigns to individual staff members
- Monitor team access and activity levels

Campaign Assignment Process

1. Select target staff member from user list
2. Choose one or multiple campaigns to assign
3. Staff gains access only to assigned campaigns
4. Lead visibility automatically updates



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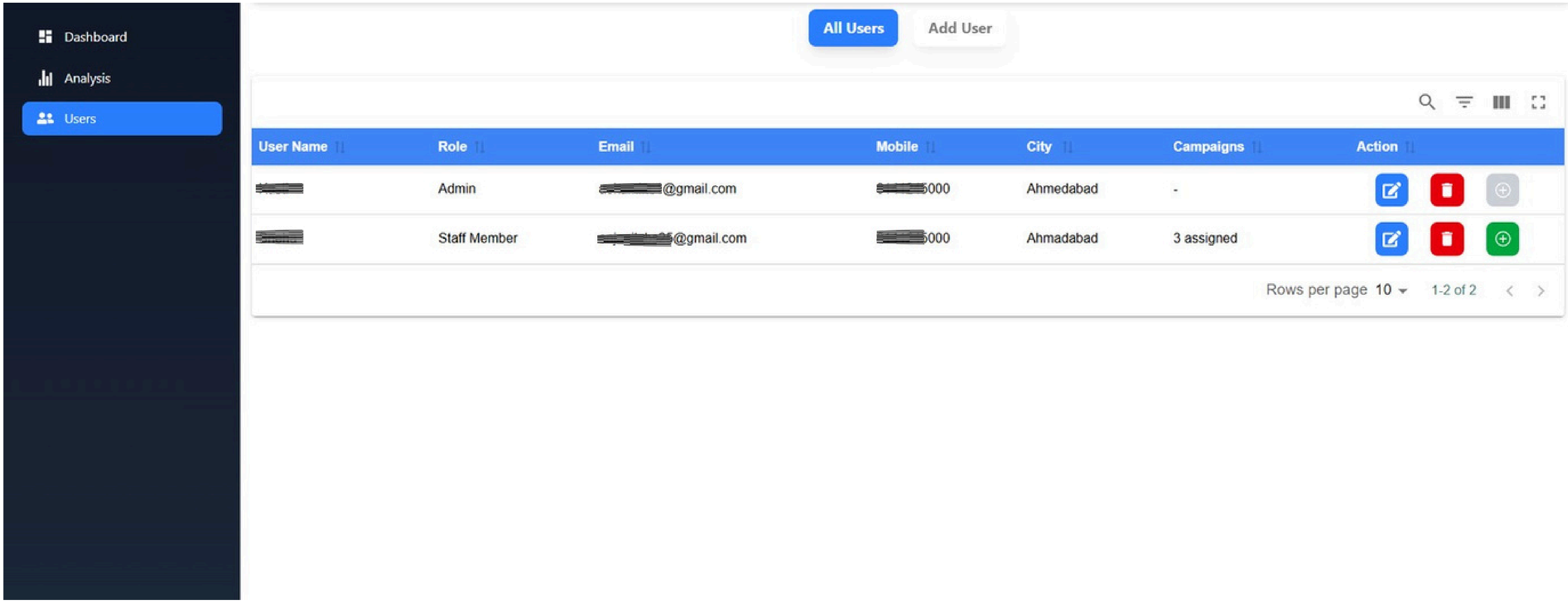

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Analysis Module

TheAnalysis module transforms your leaddataintoactionable insights through comprehensive charts and detailed reports.This powerful tool helps both Admins and Staff make data-driven decisions to improve campaign per for mance.

Staff Member Analytics

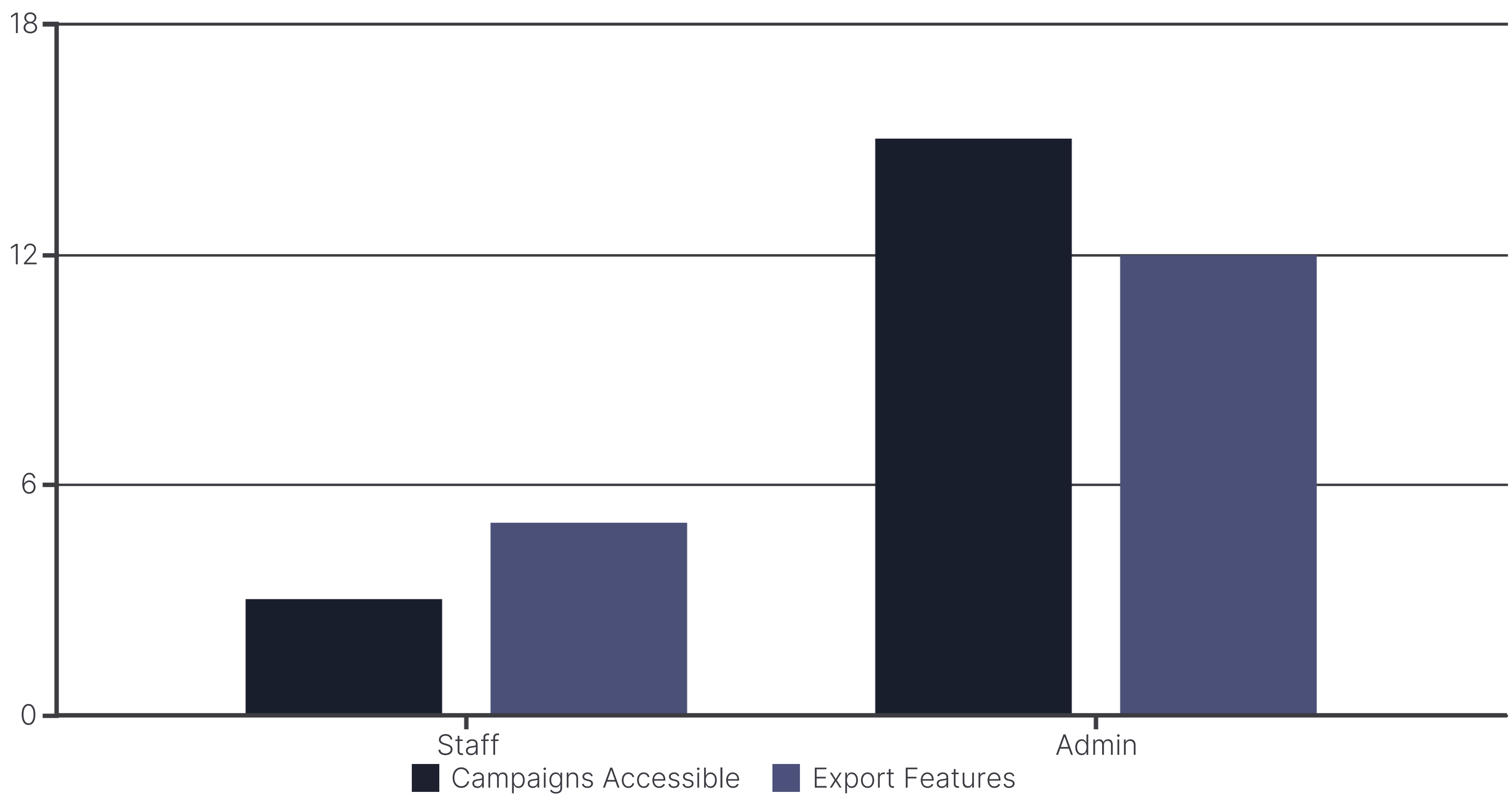
Staff members can access focused analytics for their assigned campaigns, providing relevant insights without information overload. The interface shows performance metrics, conversion rates, and lead quality indicators specific to their work scope.

Export capabilities include comprehensive report downloads in **CSV format** for further analysis or sharing with team members.

Admin Analytics

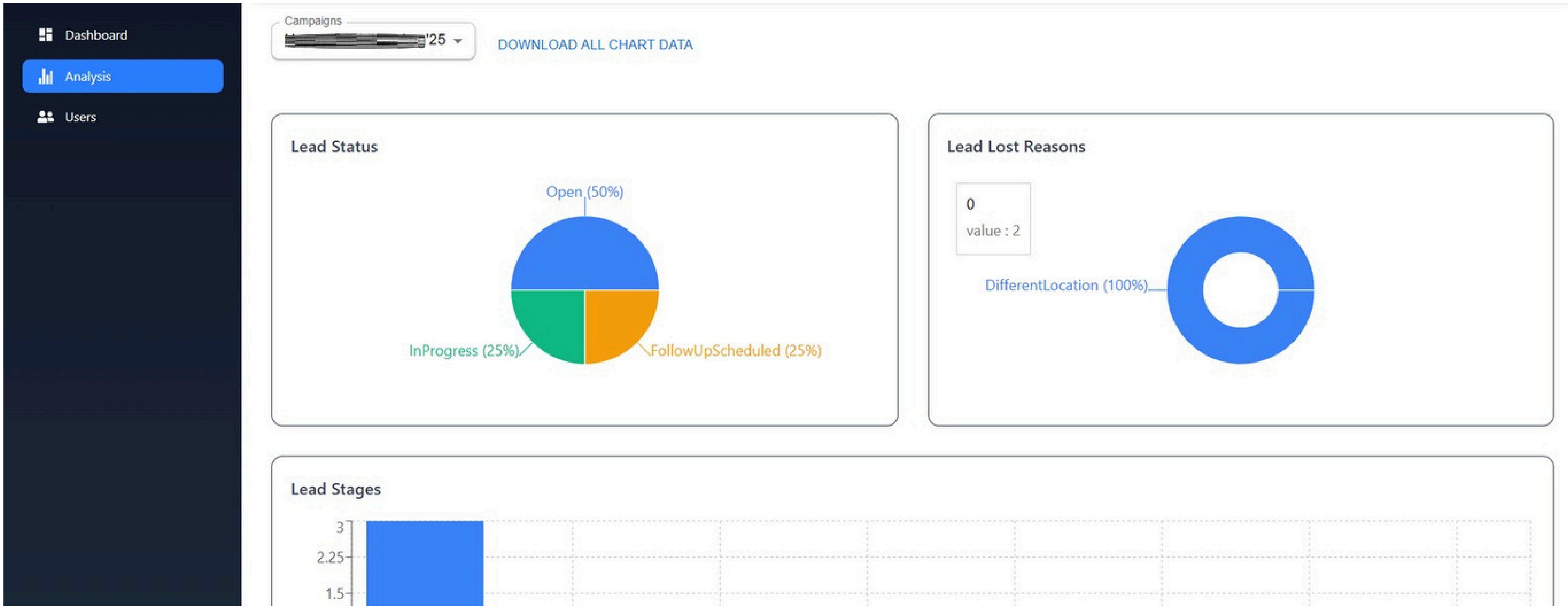
Administrators enjoy complete visibility across all campaigns with enterprise-level reporting capabilities. View organization-wide performance metrics, compare campaign effectiveness, and identify trends across different teams and time periods.

Advanced export functionality allows downloading complete analysis reports in **CSV format** for executive reporting and strategic planning.



Analysis Module

The Analysis module transforms your lead data into actionable insights through comprehensive charts and detailed



Dashboard Overview

The dashboardserves as your central command center for leadmanagement. It provides role-specific functionality and data visualization to help you work efficiently with your assigned leads and campaigns.

Admin Dashboard

Complete system oversight with unrestricted access to all campaigns and leads. Admins can view comprehensive data across the entire organization.

- **View all leads** from every campaign
- **Add manual leads** to any campaign
- **Transfer leads** between all campaigns
- **Assign follow-ups** to any lead
- **Use advanced filters** for comprehensive searching

Staff Dashboard

Focused interface showing only assigned campaign data, ensuring staff members work within their designated scope while maintaining full functionality.

- **View leads** from assigned campaigns only
- **Add manual leads** within assigned campaigns
- **Transfer leads** between assigned campaigns
- **Assign follow-ups** to their leads
- **Use filters** for efficient lead management

Core Dashboard Features

Thedashboard includesthree essentialfeatures thatformthe backboneofdailylead management operations. Understanding these functions will significantly improve your workflow efficiency.

01

Transfer Leads

Admin: Complete flexibility to transfer any lead between all available campaigns without restrictions.

Staff: Limited to transferring leads only within their specifically assigned campaigns.

02

AddManual Leads

Admin: Can manually input new leads into any campaign across the entire system.

Staff: Restricted to adding manual leads only within their assigned campaigns.

03

Add Follow-Ups

Both **Admin** and **Staff** can create detailed follow-ups for leads with comprehensive tracking information.

Follow-up details include: Stage, Status, Inquiry Date, Interest Level, Urgency, Lead Source Type, and Lead Head.

These three features are integrated components of the Dashboard module and work seamlessly together to provide comprehensive lead management capabilities.

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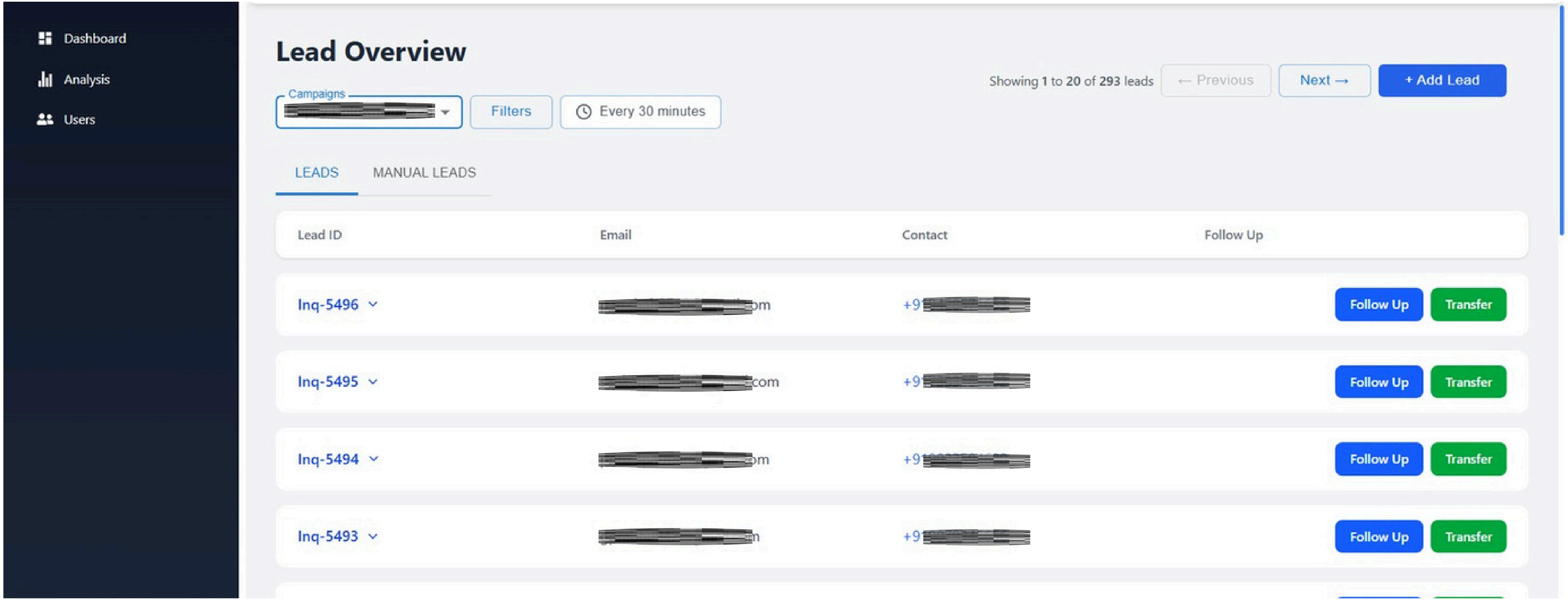

Now See What Admin Can Do ..

View All Leads

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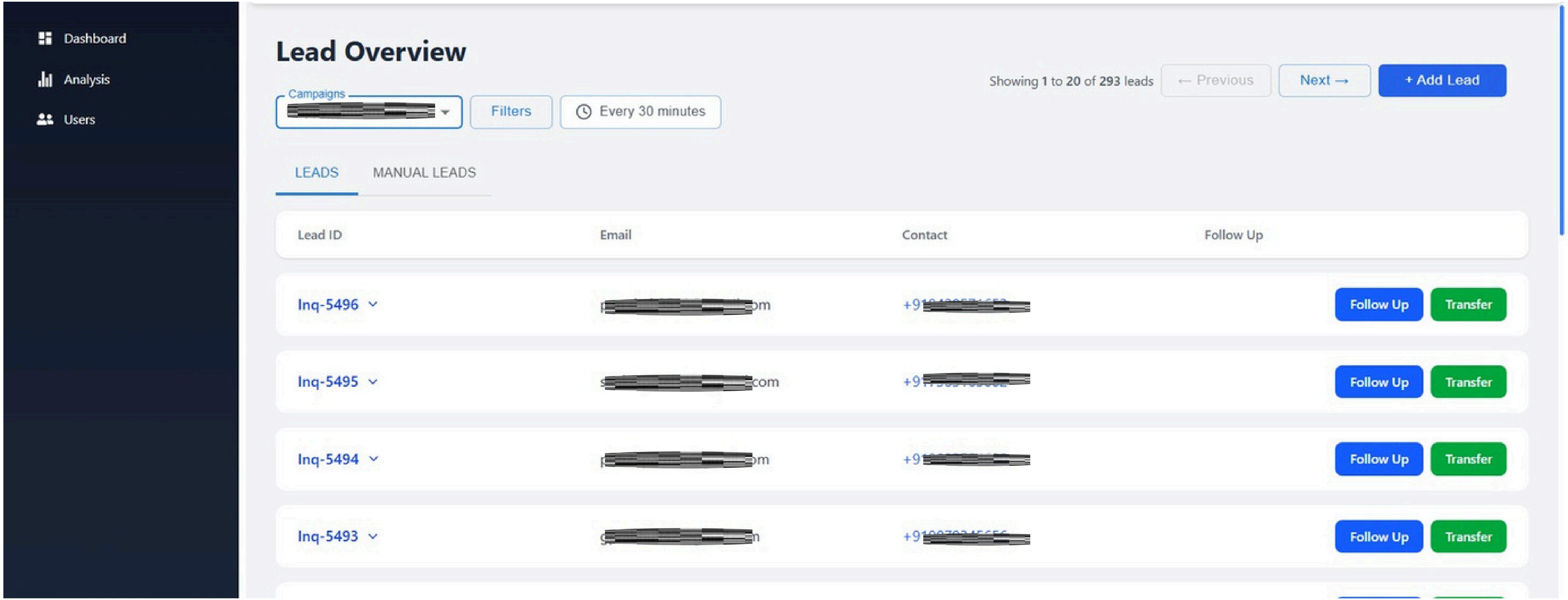

Add manual leads

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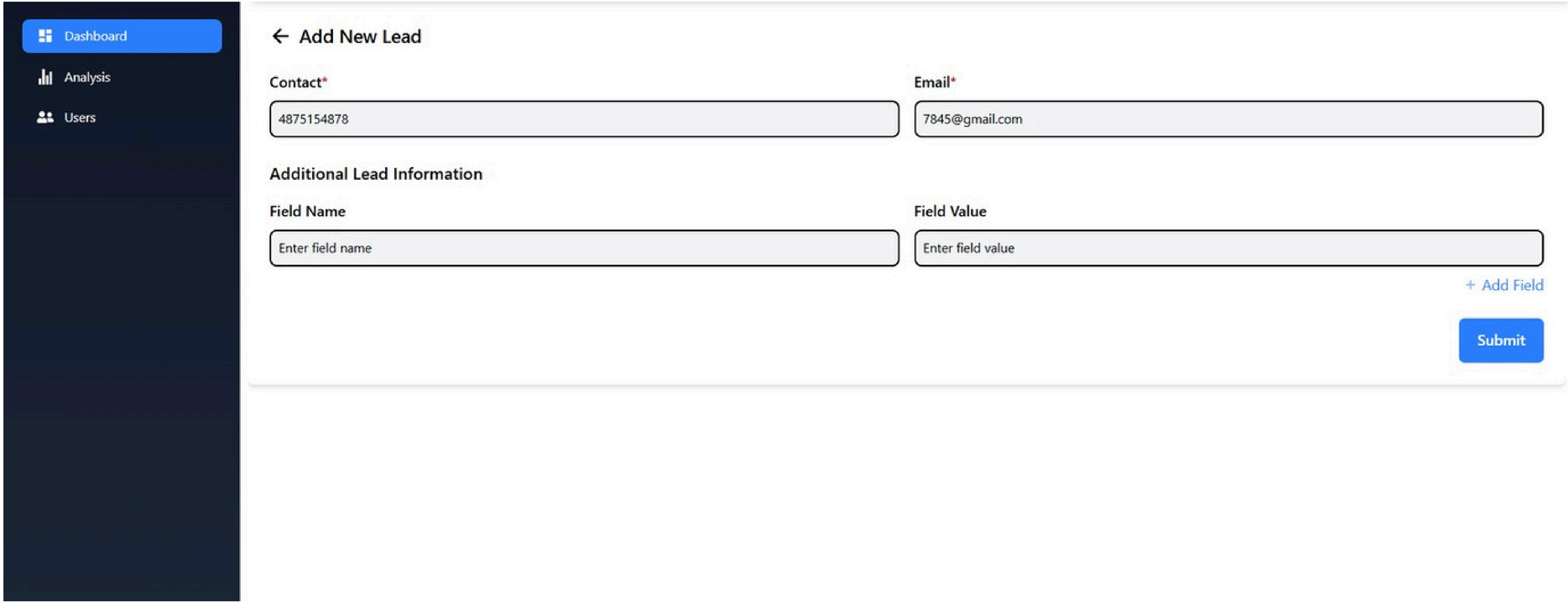
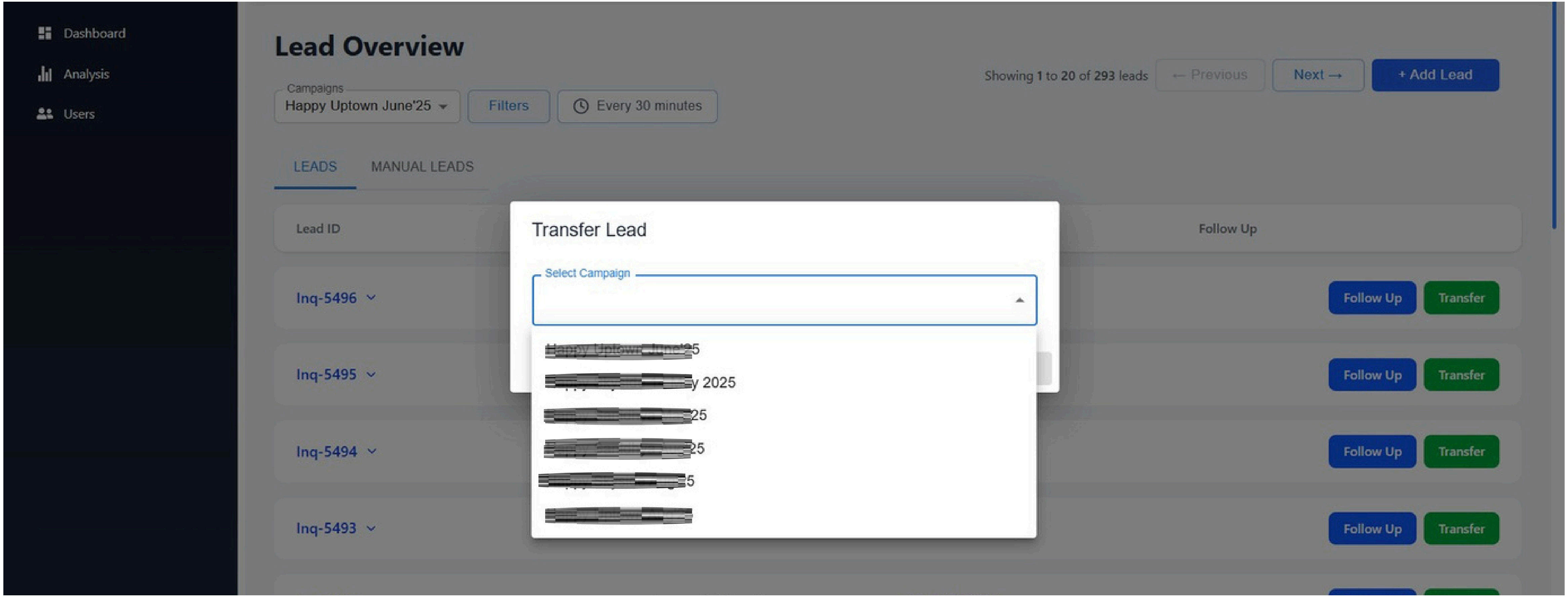


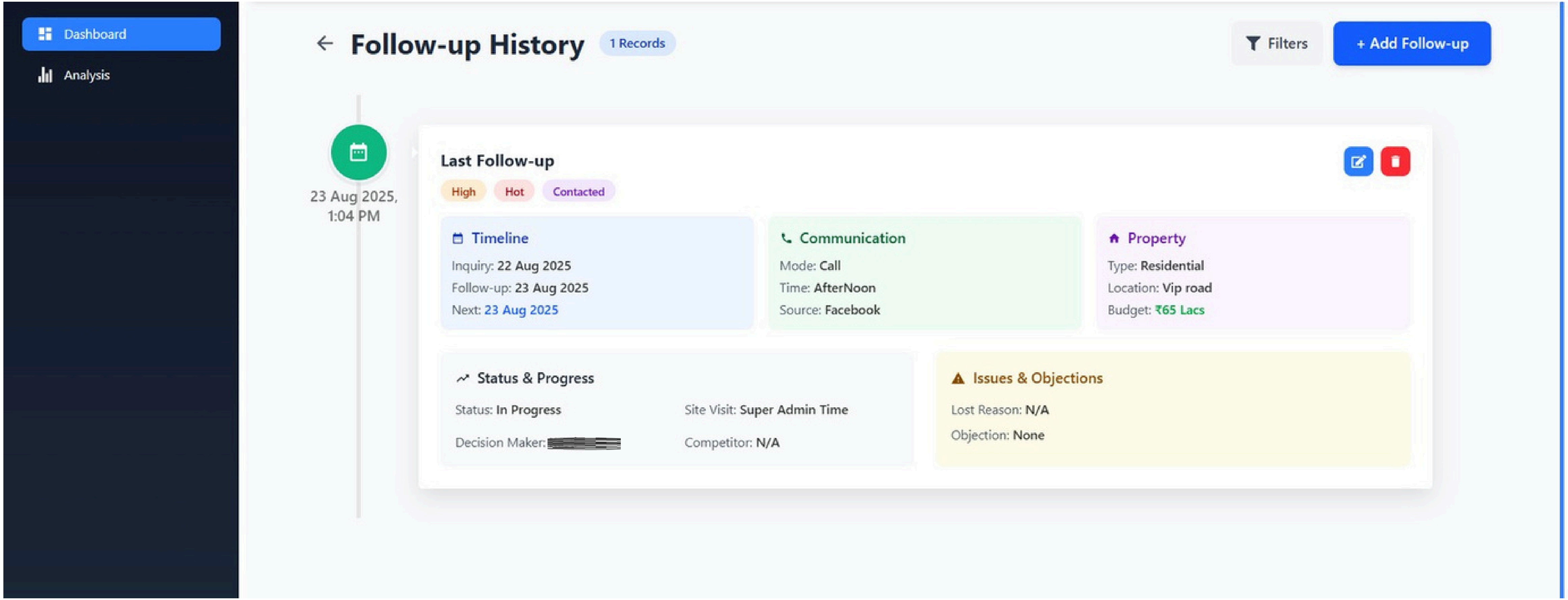
Transfer leads

Complete system oversight with unrestricted access to all campaigns and leads. Admins can Transfer Leads data across the entire organization.



Assign follow-ups

Complete system oversight with unrestricted access to all campaigns and leads. Admins can also give Follow up to Leads data across the entire organization.



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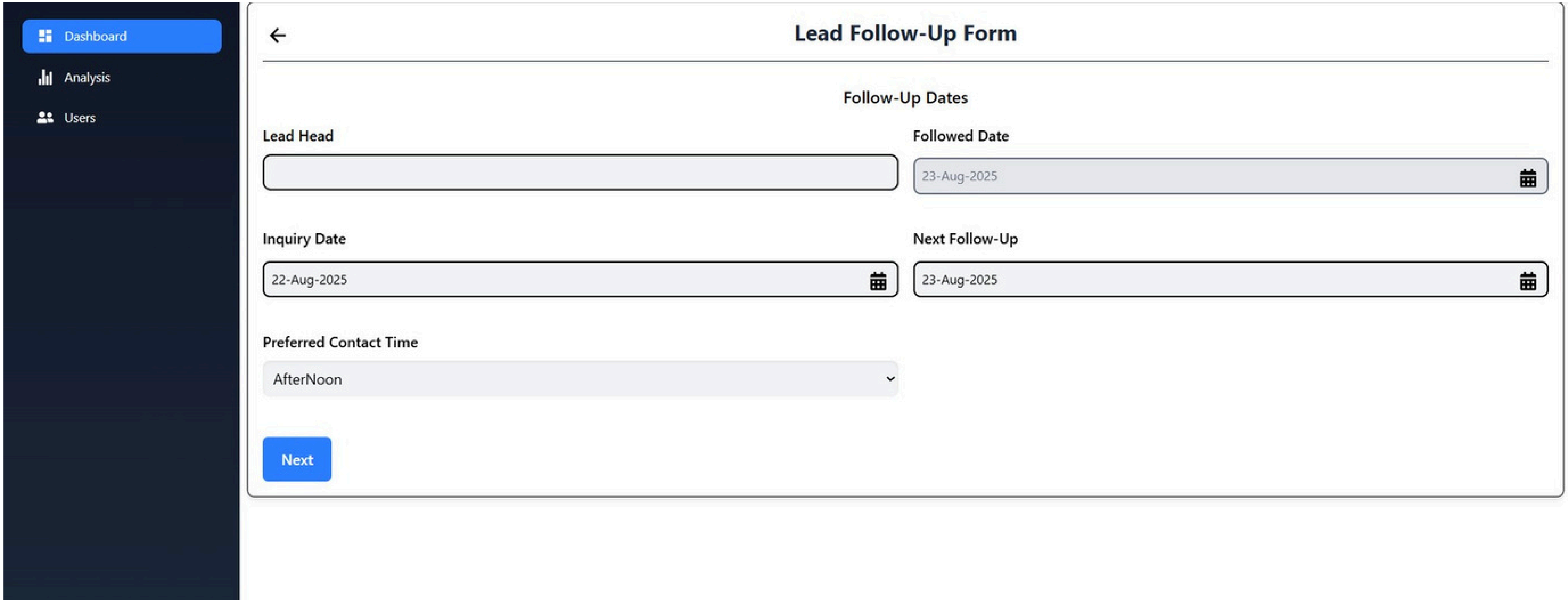

Staff Member Dashboard

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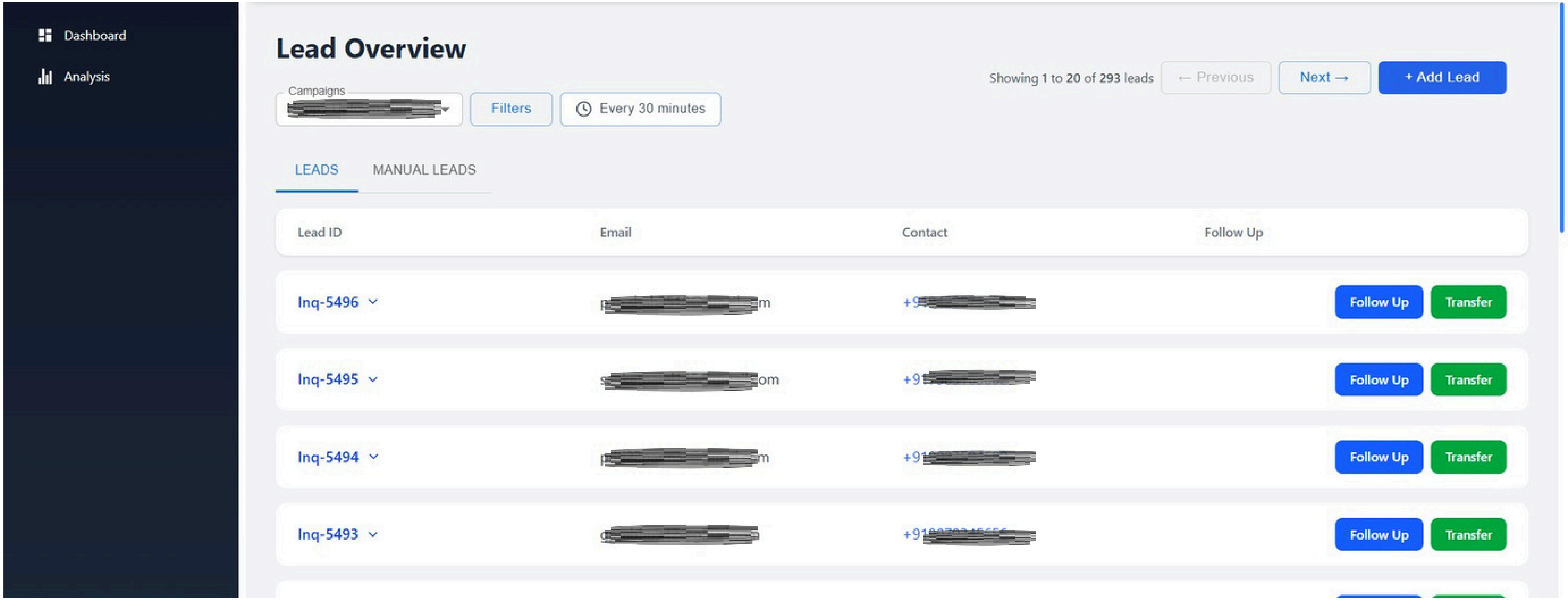

Now See What Staff member Can Do ..

View leads

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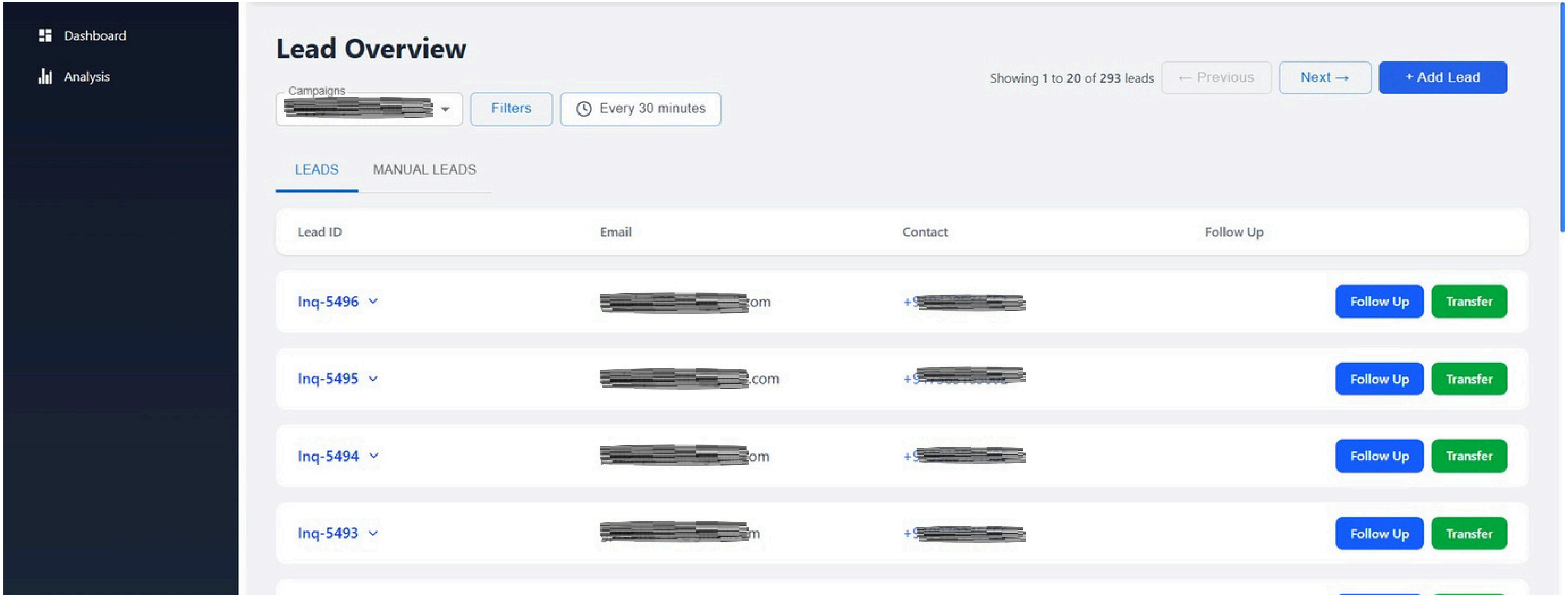

Add manual leads

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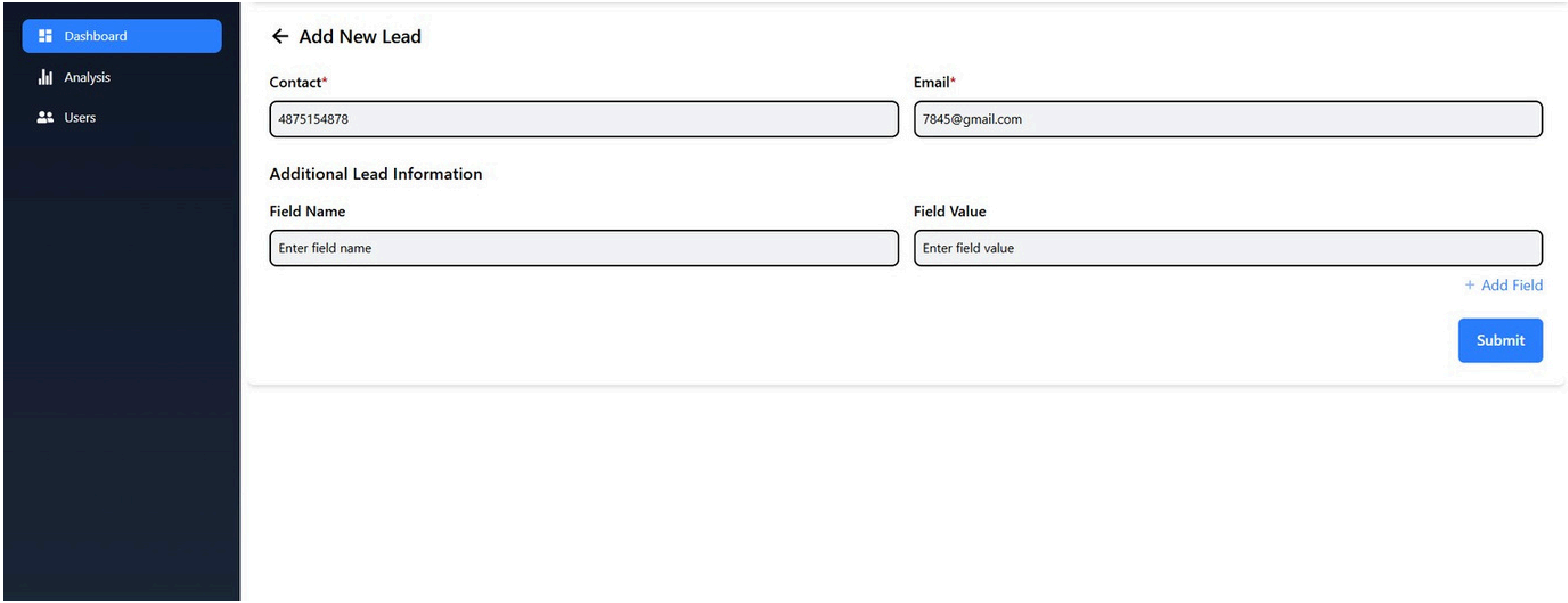

Transfer leads

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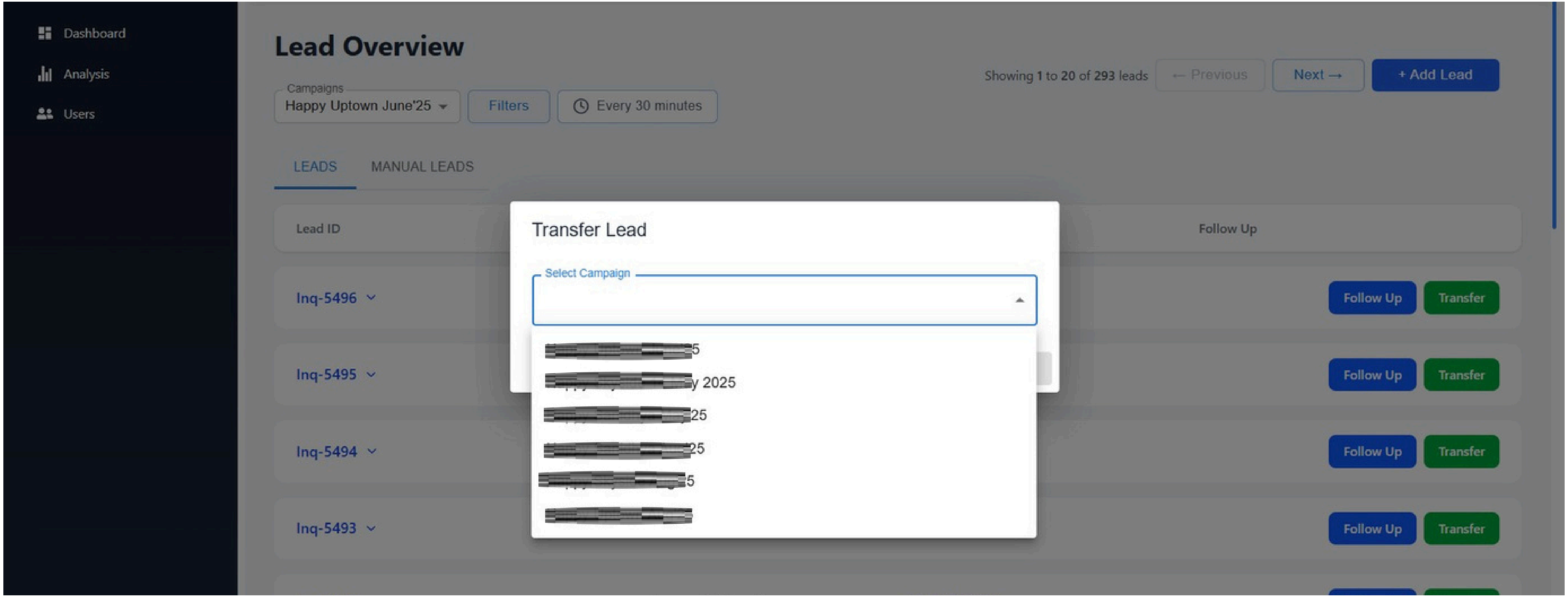

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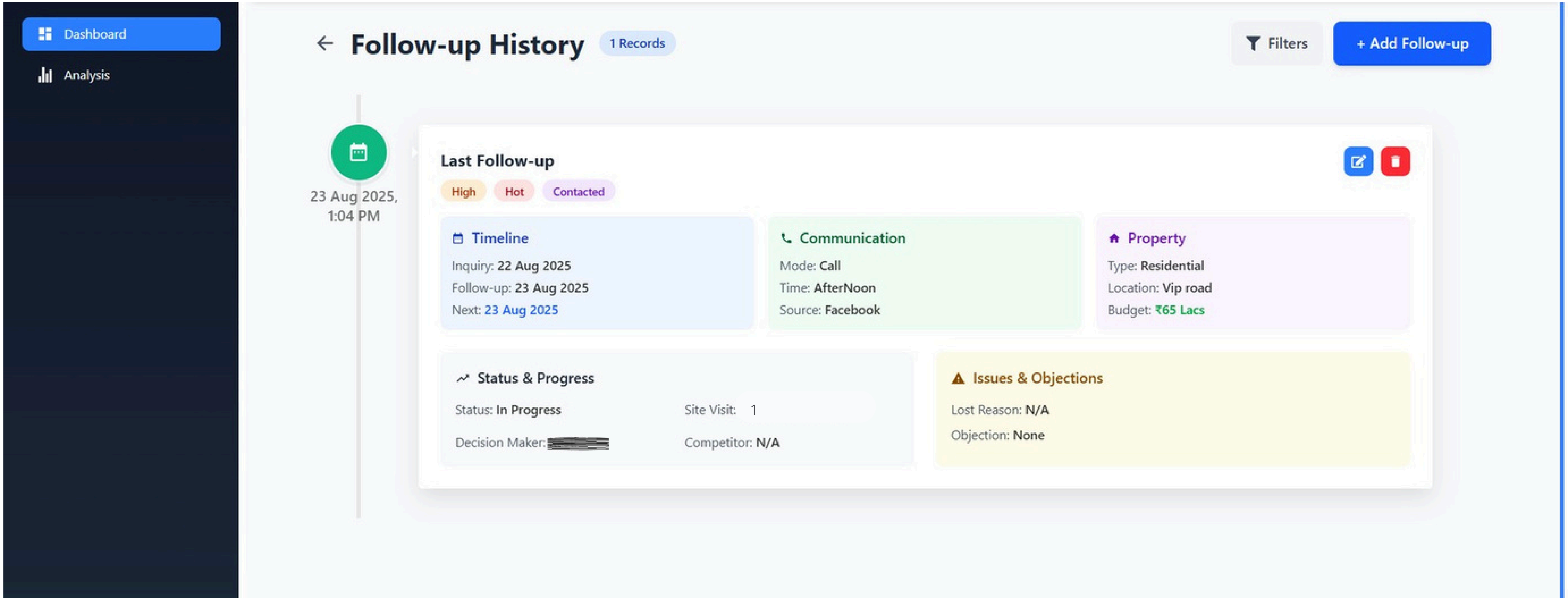

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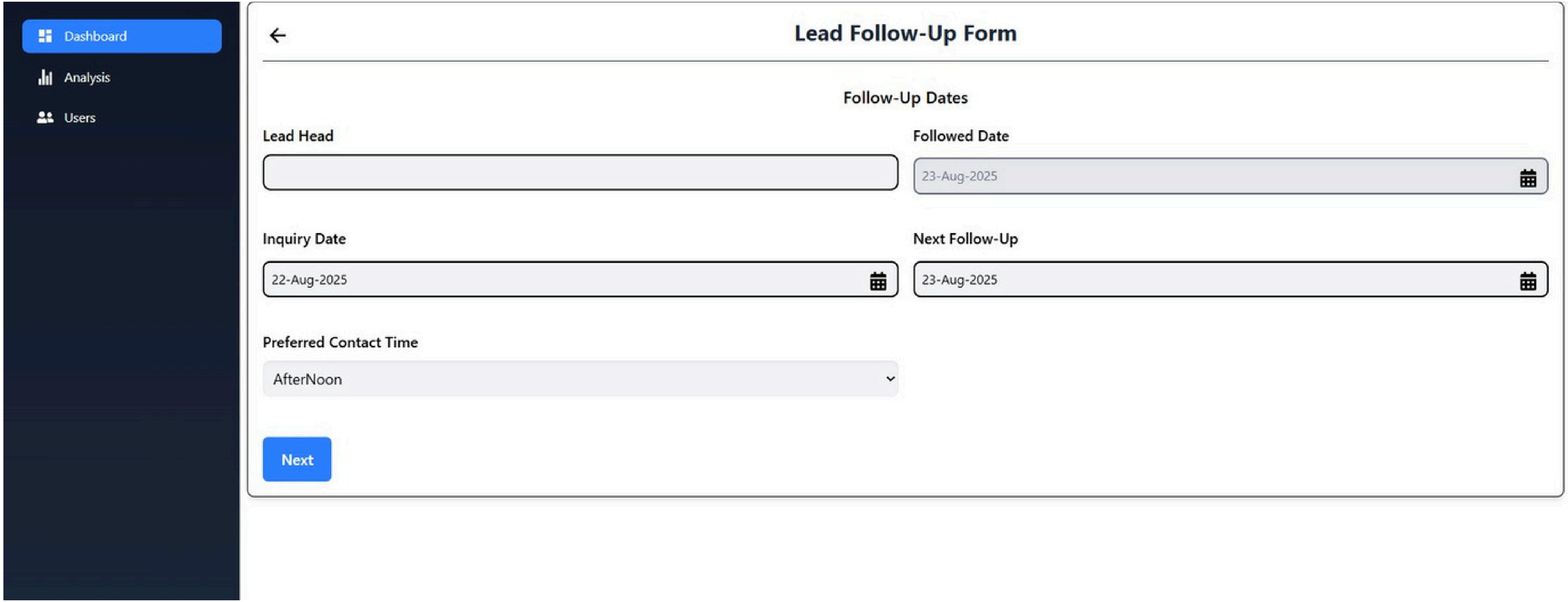

Summary

Admin Role

Complete system control with unrestricted access to all features. Admins can manage campaigns, users, leads, and generate comprehensive reports across the entire organization.

Staff Role

Focused campaign access limited to assigned campaigns only. Staff can efficiently manage their designated leads and access relevant analytics for optimal productivity.

With LeadSpark CRM, businesses can **track, manage, and analyze leads efficiently** while ensuring that staff members work only within their assigned scope. This role-based approach maximizes security, improves focus, and enhances overall team productivity.

> "LeadSpark CRM empowers your team with the right tools and appropriate access levels to drive successful lead conversion and business growth."