

# LeadSpark User Guide

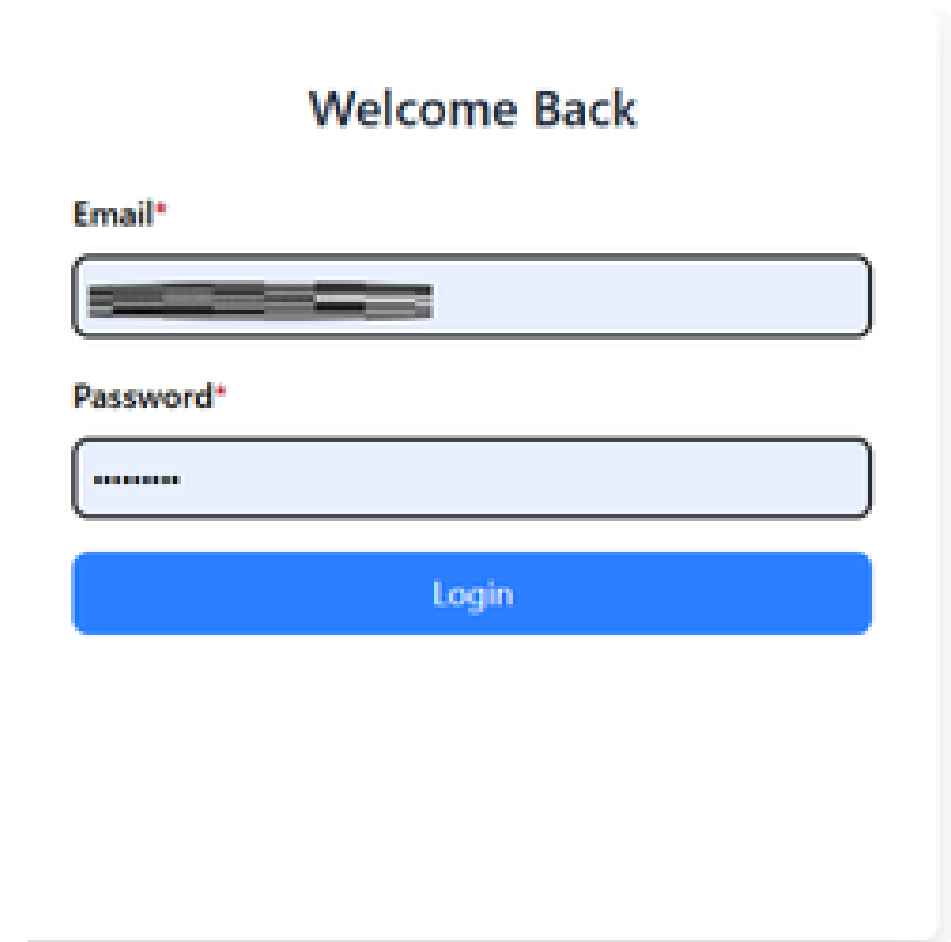
This comprehensive guide will help you understand how to effectively use LeadSpark CRM as an **Admin** or **Staff Member**. Each module is explained step by step with clear instructions to maximize your productivity and lead management capabilities.

# 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



The screenshot displays a login interface with the following elements:

- Welcome Back**: A heading centered at the top of the login area.
- Email\***: A label for the first input field, which contains a blurred email address.
- Password\***: A label for the second input field, which contains a blurred password.
- Login**: A blue button located below the password field.

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

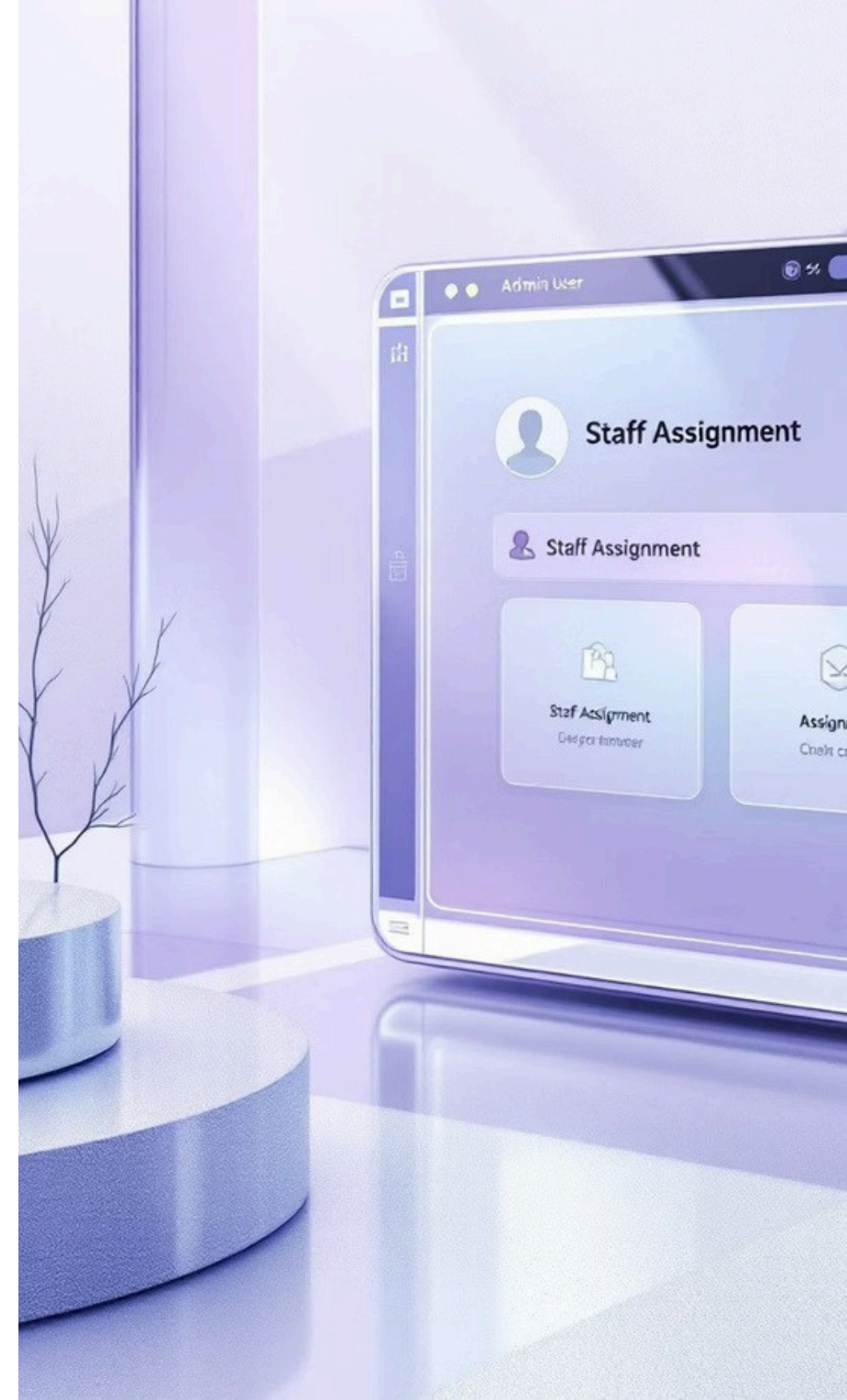
The User Management module is exclusively available to **Administrators** and provides complete control over team management and campaign assignments. This powerful feature ensures proper access control and workflow organization.

## 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

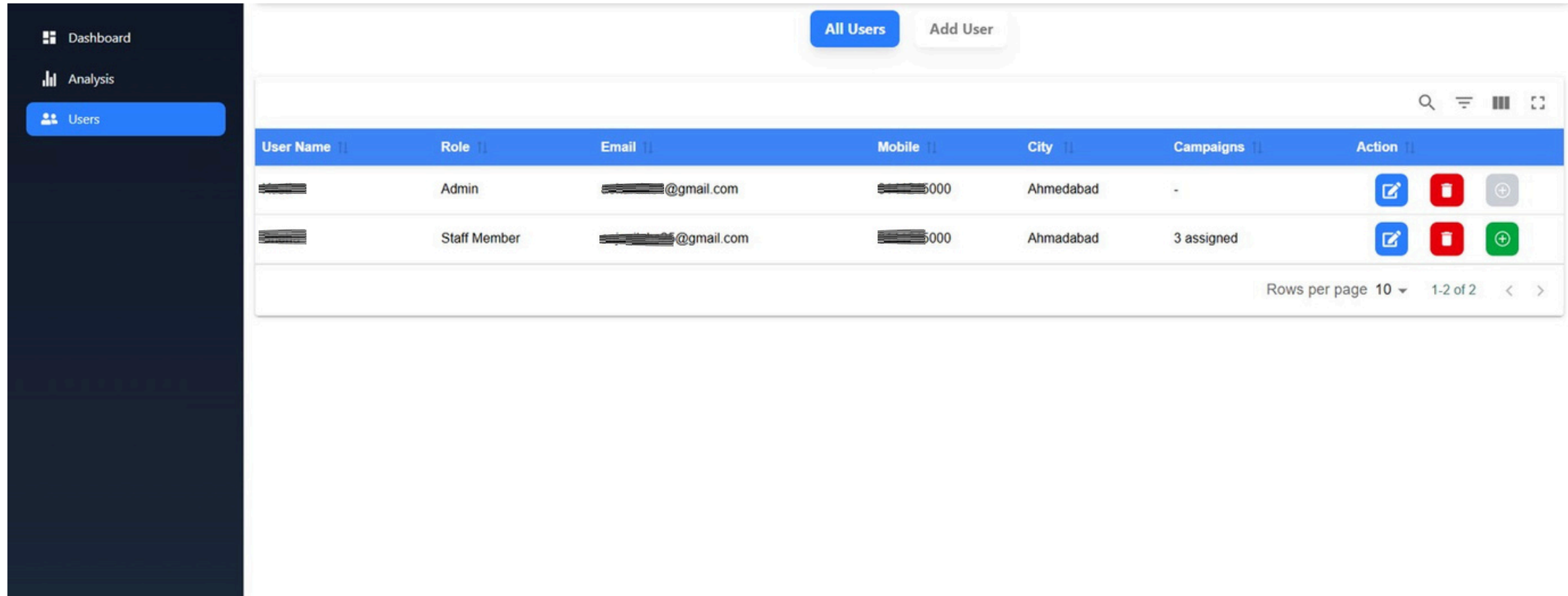
## Campaign Assignment Process

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



# User Management

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.



The screenshot displays the User Management interface. On the left is a dark sidebar with navigation options: Dashboard, Analysis, and Users (highlighted). The main content area features a header with 'All Users' and 'Add User' buttons. Below is a table with columns: User Name, Role, Email, Mobile, City, Campaigns, and Action. Two users are listed: an Admin and a Staff Member. The Staff Member has 3 campaigns assigned. At the bottom right, there is a pagination control showing 'Rows per page 10' and '1-2 of 2'.

User Name	Role	Email	Mobile	City	Campaigns	Action
[Redacted]	Admin	[Redacted]@gmail.com	[Redacted]5000	Ahmedabad	-	[Edit] [Delete] [Add]
[Redacted]	Staff Member	[Redacted]@gmail.com	[Redacted]5000	Ahmadabad	3 assigned	[Edit] [Delete] [Add]

- 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

# Analysis Module

The Analysis module transforms your lead data into actionable insights through comprehensive charts and detailed reports. This powerful tool helps both Admins and Staff make data-driven decisions to improve campaign performance.



## 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.

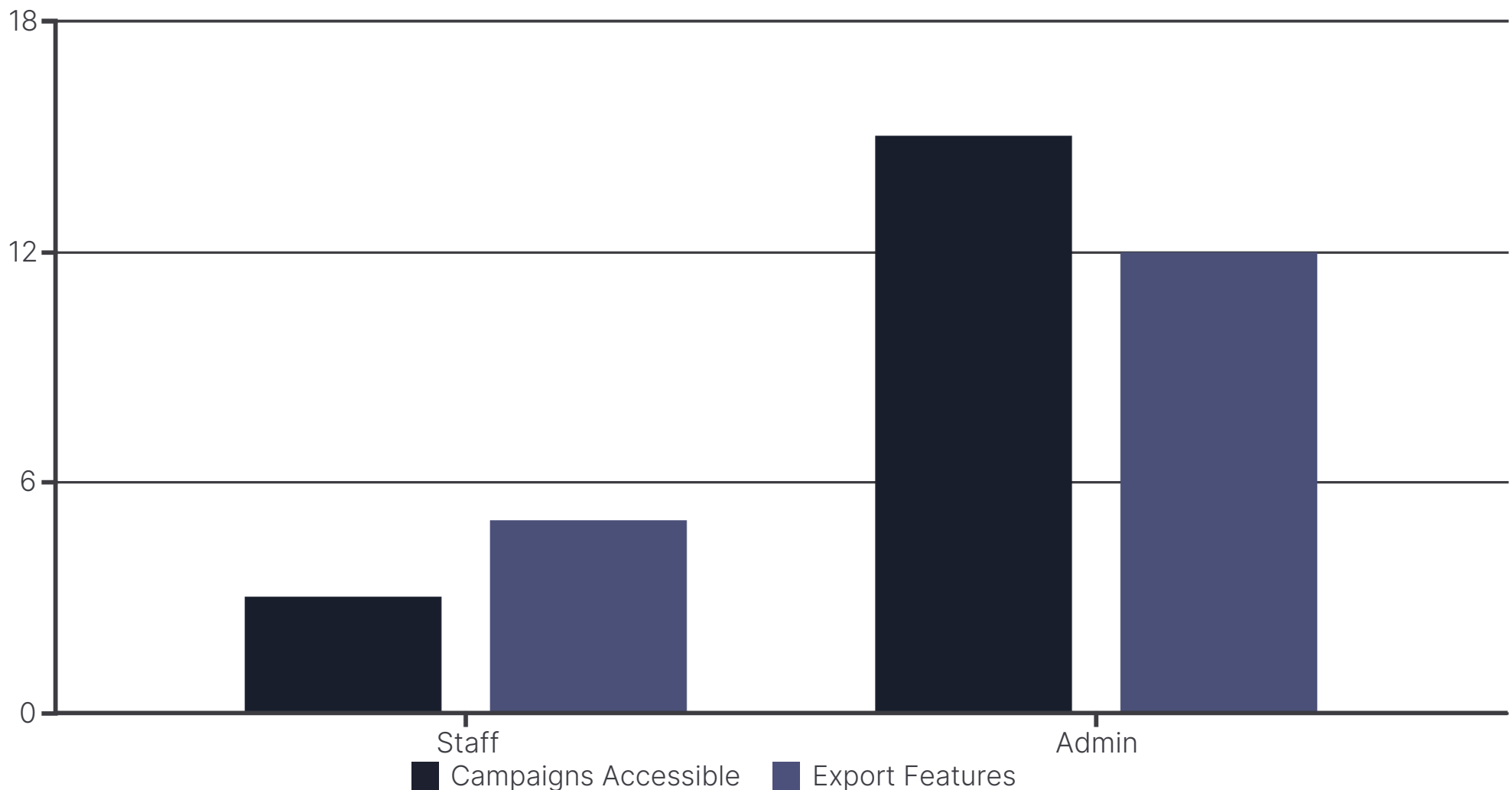
Export capabilities include comprehensive report downloads in **CSV format** for further analysis or sharing with team members.



## Admin Analytics

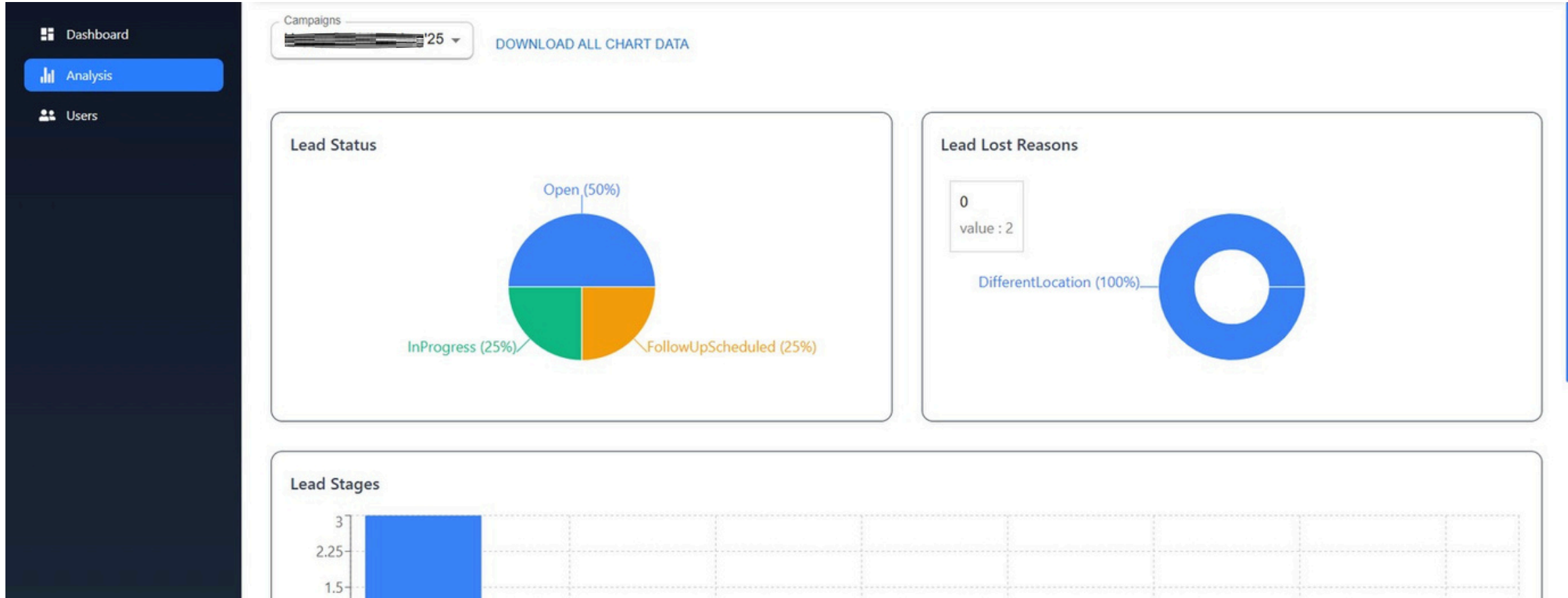
Administrators enjoy complete visibility across all campaigns with enterprise-level reporting capabilities. View organization-wide performance metrics, compare campaign effectiveness, and identify trends across different teams and time periods.

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 dashboard serves as your central command center for lead management. 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

The dashboard includes three essential features that form the backbone of daily lead 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

## Add Manual 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.

# Admin Dashboard

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

**Lead Overview**

Showing 1 to 20 of 293 leads [← Previous](#) [Next →](#) [+ Add Lead](#)

Campaigns [Filters](#) [Every 30 minutes](#)

[LEADS](#) [MANUAL LEADS](#)

Lead ID	Email	Contact	Follow Up
Inq-5496 <a href="#">▼</a>	[REDACTED]@com	+9 [REDACTED]	<a href="#">Follow Up</a> <a href="#">Transfer</a>
Inq-5495 <a href="#">▼</a>	[REDACTED]@com	+9 [REDACTED]	<a href="#">Follow Up</a> <a href="#">Transfer</a>
Inq-5494 <a href="#">▼</a>	[REDACTED]@com	+9 [REDACTED]	<a href="#">Follow Up</a> <a href="#">Transfer</a>
Inq-5493 <a href="#">▼</a>	[REDACTED]@n	+9 [REDACTED]	<a href="#">Follow Up</a> <a href="#">Transfer</a>

Now See What Admin Can Do ..

# View All Leads

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

The screenshot displays a 'Lead Overview' dashboard. On the left is a dark sidebar with navigation links: 'Dashboard' (with a grid icon), 'Analysis' (with a bar chart icon), and 'Users' (with a group of people icon). The main content area has a header 'Lead Overview' and a sub-header 'Showing 1 to 20 of 293 leads'. Below the header are controls for 'Campaigns' (a dropdown menu), 'Filters', and a refresh button labeled 'Every 30 minutes'. There are also 'Previous' and 'Next' navigation buttons, and a '+ Add Lead' button. Below these controls are two tabs: 'LEADS' (active) and 'MANUAL LEADS'. The main area contains a table with the following columns: 'Lead ID', 'Email', 'Contact', and 'Follow Up'. The table lists four leads, each with a dropdown arrow next to the ID and 'Follow Up' and 'Transfer' buttons in the 'Follow Up' column.

Lead ID	Email	Contact	Follow Up
Inq-5496 ▾	[redacted]@om	+9 [redacted]	<button>Follow Up</button> <button>Transfer</button>
Inq-5495 ▾	[redacted]@com	+9 [redacted]	<button>Follow Up</button> <button>Transfer</button>
Inq-5494 ▾	[redacted]@om	+9 [redacted]	<button>Follow Up</button> <button>Transfer</button>
Inq-5493 ▾	[redacted]@n	+9 [redacted]	<button>Follow Up</button> <button>Transfer</button>

# Add manual leads

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

[Dashboard](#)

[Analysis](#)

[Users](#)

← Add New Lead

**Contact\***  **Email\***

**Additional Lead Information**

Field Name	Field Value
<input type="text" value="Enter field name"/>	<input type="text" value="Enter field value"/>

[+ Add Field](#)

# Transfer leads

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

The screenshot displays a CRM interface for lead management. On the left is a dark sidebar with navigation options: Dashboard, Analysis, and Users. The main area is titled 'Lead Overview' and shows a list of leads under the 'LEADS' tab. The current campaign is 'Happy Uptown June'25'. A 'Transfer Lead' modal is open, showing a dropdown menu for selecting a campaign. The dropdown lists several campaigns, including 'Happy Uptown June'25' and 'Happy Uptown July 2025'. The background shows a list of leads with columns for Lead ID, Campaign, and actions like 'Follow Up' and 'Transfer'.

Lead ID	Campaign	Follow Up	Transfer
Inq-5496	Happy Uptown June'25	Follow Up	Transfer
Inq-5495	Happy Uptown July 2025	Follow Up	Transfer
Inq-5494	Happy Uptown June'25	Follow Up	Transfer
Inq-5493	Happy Uptown June'25	Follow Up	Transfer

# 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.

The screenshot displays a CRM interface for 'Follow-up History'. On the left is a dark sidebar with 'Dashboard' and 'Analysis' options. The main content area features a header with a back arrow, the title 'Follow-up History', and a '1 Records' indicator. To the right are 'Filters' and '+ Add Follow-up' buttons. A vertical timeline on the left shows a green calendar icon for '23 Aug 2025, 1:04 PM'. The main record is titled 'Last Follow-up' and includes several data panels: 'Timeline' (Inquiry: 22 Aug 2025, Follow-up: 23 Aug 2025, Next: 23 Aug 2025), 'Communication' (Mode: Call, Time: AfterNoon, Source: Facebook), 'Property' (Type: Residential, Location: Vip road, Budget: ₹65 Lacs), 'Status & Progress' (Status: In Progress, Site Visit: Super Admin Time, Decision Maker: ██████████, Competitor: N/A), and 'Issues & Objections' (Lost Reason: N/A, Objection: None). The record also has 'High', 'Hot', and 'Contacted' status tags and edit/delete icons.

# 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.

**Lead Follow-Up Form**

**Follow-Up Dates**

**Lead Head**

**Followed Date**

**Inquiry Date**

**Next Follow-Up**

**Preferred Contact Time**

**Next**

# Staff Member Dashboard

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

The screenshot displays the 'Lead Overview' section of a staff member's dashboard. On the left is a dark sidebar with 'Dashboard' and 'Analysis' options. The main content area features a 'Lead Overview' title, a campaign selector, a 'Filters' button, and a refresh timer set to 'Every 30 minutes'. Navigation controls include 'Previous', 'Next', and '+ Add Lead' buttons. Below these are tabs for 'LEADS' and 'MANUAL LEADS'. The 'LEADS' tab is active, showing a table with columns for Lead ID, Email, Contact, and Follow Up. The table lists four leads with their respective IDs, email addresses, contact numbers, and 'Follow Up' and 'Transfer' action buttons.

Lead ID	Email	Contact	Follow Up
Inq-5496	[Redacted]m	+9 [Redacted]	Follow Up Transfer
Inq-5495	[Redacted]om	+9 [Redacted]	Follow Up Transfer
Inq-5494	[Redacted]m	+9 [Redacted]	Follow Up Transfer
Inq-5493	[Redacted]	+9 [Redacted]	Follow Up Transfer

Now See What Staff member Can Do ..

# View leads

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

**Lead Overview**

Campaigns [Redacted] Filters Every 30 minutes

Showing 1 to 20 of 293 leads [← Previous](#) [Next →](#) [+ Add Lead](#)

**LEADS** **MANUAL LEADS**

Lead ID	Email	Contact	Follow Up
Inq-5496 ▾	[Redacted]om	+ [Redacted]	<a href="#">Follow Up</a> <a href="#">Transfer</a>
Inq-5495 ▾	[Redacted].com	+ [Redacted]	<a href="#">Follow Up</a> <a href="#">Transfer</a>
Inq-5494 ▾	[Redacted]om	+ [Redacted]	<a href="#">Follow Up</a> <a href="#">Transfer</a>
Inq-5493 ▾	[Redacted]m	+ [Redacted]	<a href="#">Follow Up</a> <a href="#">Transfer</a>

# Add manual leads

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

The image shows a web application interface for adding manual leads. On the left is a dark sidebar with three menu items: 'Dashboard' (highlighted in blue), 'Analysis', and 'Users'. The main content area is titled 'Add New Lead' with a back arrow. It contains two rows of input fields. The first row has 'Contact\*' with the value '4875154878' and 'Email\*' with the value '7845@gmail.com'. The second row is under the heading 'Additional Lead Information' and has 'Field Name' with the placeholder 'Enter field name' and 'Field Value' with the placeholder 'Enter field value'. A '+ Add Field' link is located to the right of the 'Field Value' input. A blue 'Submit' button is positioned at the bottom right of the form area.

Dashboard

Analysis

Users

← Add New Lead

Contact\* 4875154878

Email\* 7845@gmail.com

Additional Lead Information

Field Name Enter field name

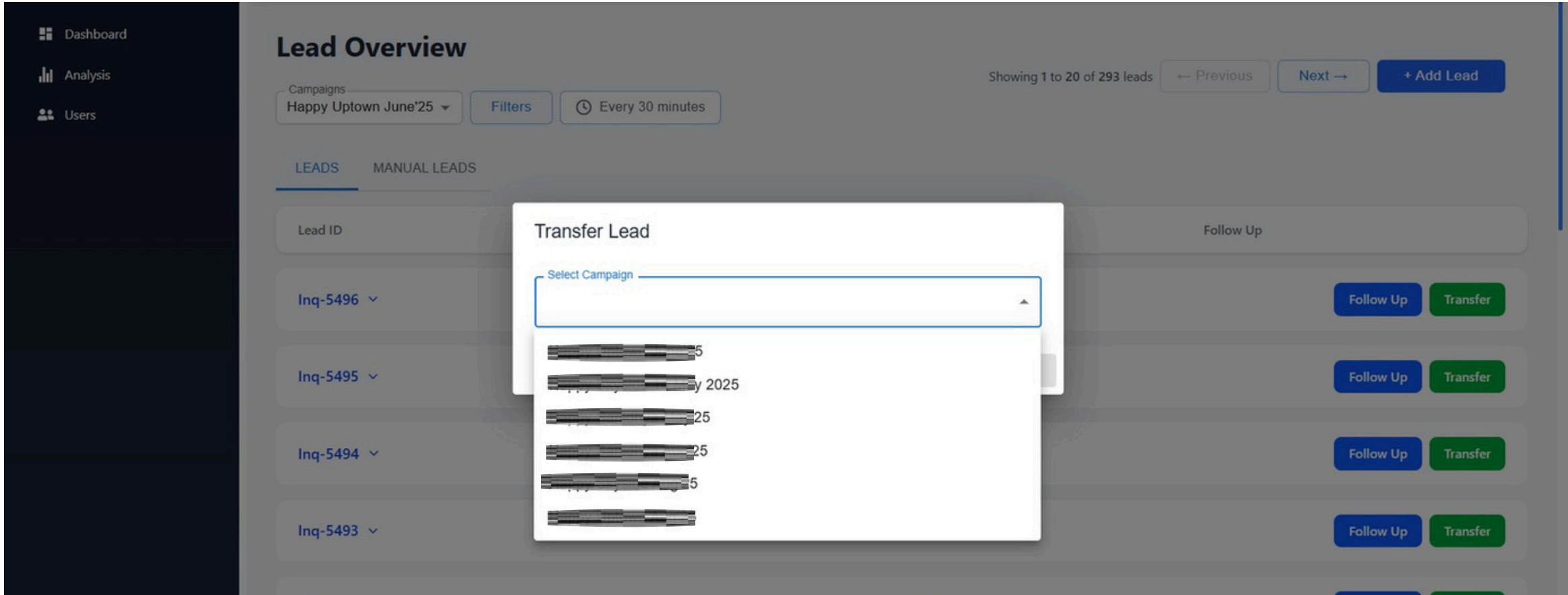
Field Value Enter field value

+ Add Field

Submit

# Transfer leads

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



# Assign follow-ups

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

The screenshot displays a CRM interface with a dark sidebar on the left containing 'Dashboard' and 'Analysis' options. The main content area is titled 'Follow-up History' with a '1 Records' indicator. A 'Filters' button and a '+ Add Follow-up' button are located in the top right. A vertical timeline on the left shows a calendar icon for '23 Aug 2025, 1:04 PM'. The main record is titled 'Last Follow-up' and includes three status tags: 'High', 'Hot', and 'Contacted'. The record is divided into several sections: 'Timeline' (Inquiry: 22 Aug 2025, Follow-up: 23 Aug 2025, Next: 23 Aug 2025), 'Communication' (Mode: Call, Time: AfterNoon, Source: Facebook), 'Property' (Type: Residential, Location: Vip road, Budget: ₹65 Lacs), 'Status & Progress' (Status: In Progress, Site Visit: 1, Decision Maker: ██████████, Competitor: N/A), and 'Issues & Objections' (Lost Reason: N/A, Objection: None). Edit and delete icons are visible in the top right of the record card.

# Assign follow-ups

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

The image shows a web application interface for assigning follow-ups. On the left is a dark sidebar with three menu items: 'Dashboard' (with a grid icon), 'Analysis' (with a bar chart icon), and 'Users' (with a group of people icon). The main content area is titled 'Lead Follow-Up Form' and features a back arrow in the top left. The form is organized into sections: 'Follow-Up Dates' at the top, 'Lead Head' with an empty text input, 'Inquiry Date' with a date input '22-Aug-2025' and a calendar icon, 'Preferred Contact Time' with a dropdown menu set to 'AfterNoon', 'Followed Date' with a date input '23-Aug-2025' and a calendar icon, and 'Next Follow-Up' with a date input '23-Aug-2025' and a calendar icon. A blue 'Next' button is located at the bottom left of the form area.

**Dashboard**

**Analysis**

**Users**

**Lead Follow-Up Form**

**Follow-Up Dates**

**Lead Head**

**Followed Date**

23-Aug-2025

**Inquiry Date**

22-Aug-2025

**Next Follow-Up**

23-Aug-2025

**Preferred Contact Time**

AfterNoon

**Next**

# 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."