

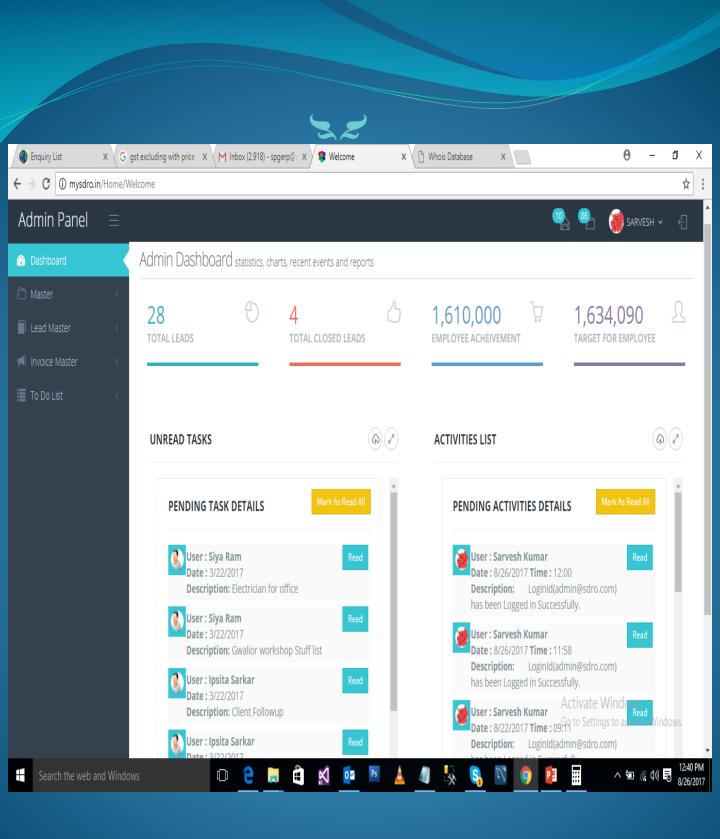




# SPG LEAD Management CRM Presentation



## MIS





# Features of SPG Lead Management CRM.



1. Master Creation

2. Lead Master

3. Invoice Master

4. To Do List



### Master Creation



#### 1.1. Primary Master

a) Branch Master

#### b) Collectorate Master

- c) Company Group
- d) Department
- e) Designation
- f) Range
- g) Region
- h) Role
- 1.2. Party Master
  - a) Company Master
  - b) Party Type
  - c) Party Master
  - d) Party Address
  - e) Contact Person
- 1.3. Employee Master
  - a) Employee Type
  - b) Employee
  - c) Employee Target



- 1.4. Place Master
  - a) Country Master
  - b) State Master
  - c) City Master
  - d) Area Master
- 1.5. Payment Master
  - a) Payment Mode
  - b) Payment Type
  - c) Payment Status
- 1.6. FY Master (Financial Year)
- 1.7. Invoice Master
  - a) Prefix
  - b) Invoice Type
  - c) Tax Type



### Lead Master



- 2.1. Lead Source
- 2.2. Lead Stage
- 2.3. Lead Type
- 2.4. New Lead



### Invoice Master



#### 3.1. New Invoice



#### To Do List



4.1. New Task Assign4.2. Pending List4.3. Closed List



#### Dash Board



## Reporting



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