

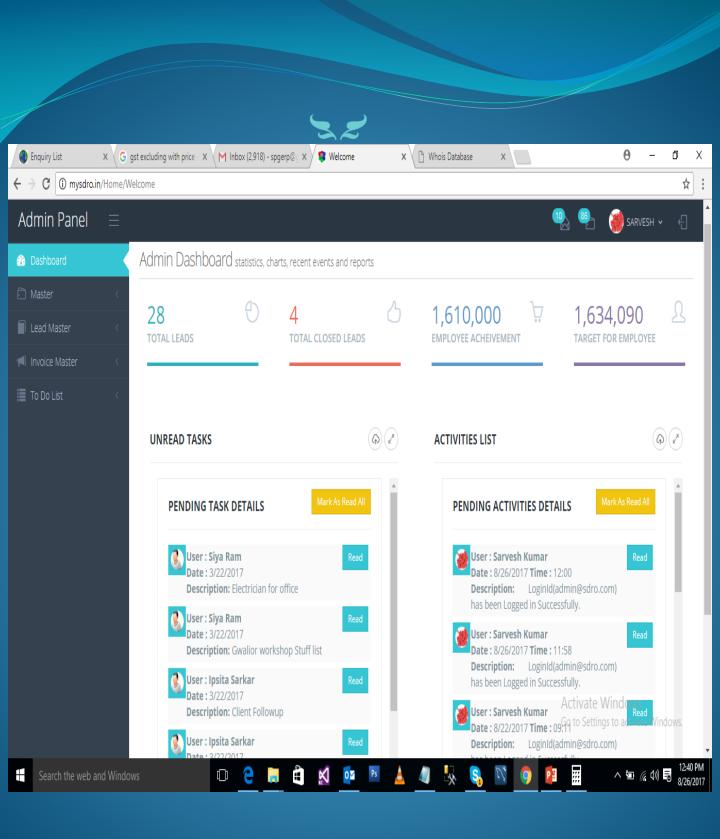




SPG LEAD Management CRM Presentation



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



RAJAN GUPTA (BUSINESS DEVELOPMENT MANAGER) B-16, 2ND FLOOR, BHAGAWATI GARDEN, NEAR METRO PILLOR NO-781, Dwarka Mode, New Delhi-110059. Mob - +91-9990390197, +91-9540522321 Web – www.spgtechnologies.com