



Technologies

Imagine IT





SPG LEAD
Management
CRM
Presentation





MIS





- Dashboard
- Master
- Lead Master
- Invoice Master
- To Do List

Admin Dashboard statistics, charts, recent events and reports



UNREAD TASKS



PENDING TASK DETAILS		Mark As Read All
User : Siya Ram Date : 3/22/2017 Description: Electrician for office	Read	
User : Siya Ram Date : 3/22/2017 Description: Gwalior workshop Stuff list	Read	
User : Ipsita Sarkar Date : 3/22/2017 Description: Client Followup	Read	
User : Ipsita Sarkar Date : 3/22/2017	Read	

ACTIVITIES LIST



PENDING ACTIVITIES DETAILS		Mark As Read All
User : Sarvesh Kumar Date : 8/26/2017 Time : 12:00 Description: LoginId(admin@sdro.com) has been Logged in Successfully.	Read	
User : Sarvesh Kumar Date : 8/26/2017 Time : 11:58 Description: LoginId(admin@sdro.com) has been Logged in Successfully.	Read	
User : Sarvesh Kumar Date : 8/22/2017 Time : 09:11 Description: LoginId(admin@sdro.com)	Read	





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 Assign

4.2. Pending List

4.3. Closed List





Dash Board





Reporting





Thank
you!



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