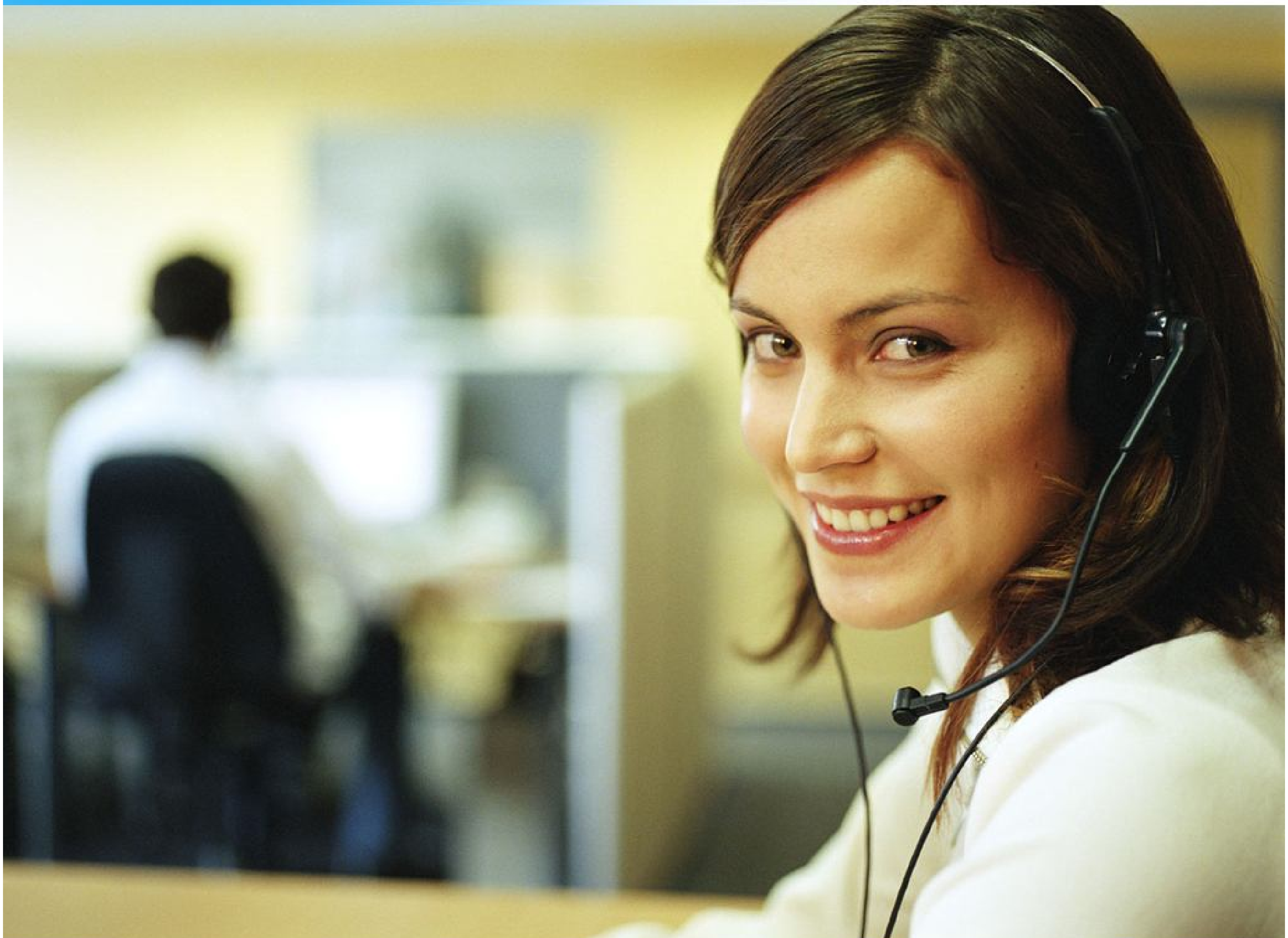
Solutions for the Global Village



LEAD MANAGEMENT SYSTEM

PRODUCT FEATURES »

Table of Content

1. Overview

The lead management system is a premium web service used to enhance the lead management capabilities of any organization. It enables real time tracking of all the leads, single click allocation of opportunities, easy reallocation, reminders and interaction management. Its simple and intuitive UI is easy to use and comprehend. This document briefly explains most of the features of this product.

2. Lead Management system

a. Office Setup

This module is used to add/edit the Operating office details. The user must add the following details, name of the office, manager name, reporting office, office phone number, email id, fax number, address, country, state, city, pin code, and status. The office name, the manager name, the reporting office, phone number, email id and address details are mandatory.

b. Designations

This module is used to add/edit the designation details. The user must add the following details, name of the designation, the abbreviation, the reporting designation, description, and status. The user must also add the roles of the designation here. The designation name and the reporting designation fields are mandatory. The roles will set the permission level of the designation

c. Employee

This module is used to add/edit the employee details of the system. The user must fill in the details for the employee name, joining date, designation, reporting office, contact number, email id, address details, pin code, status, user id, and password. The employee name, designation, office name, contact number, address details, user id and password are mandatory fields.

d. Capture Opportunity

This module is used to add opportunities. The user must enter details like project enquired, customer name, target amount, source, address, country, state, city, pin code, email, contact number, the pursuit start date, the pursuit end date, status, probability and notes. The user must also assign the pursue team and assign the lead to any one of the selected team. The project name, customer name, city and status are mandatory details.

e. Capture Opportunity Tasks details

This module is used to add tasks to the captured opportunities. The user must enter details like task goal, status, start and end date, percentage of completion, assigned employee and additional notes. The task name, status and the assigned employee details are mandatory.

f. Capture Opportunity Interaction details

This module is used to add interaction details to the captured opportunities. The user must enter details like opportunity name, task goal, opportunity contact, interaction mode, date, time, place, cost and additional notes. The date is a mandatory field while adding the details for any opportunity.

g. Capture Opportunity Contact details

This module is used to add contact details to the captured opportunities. The user must enter details like opportunity name, name of the contact, designation, address, country, state, city, contact number, email id, pin code and the public contact check. The Opportunity name, the contact name, state and city are mandatory fields.

h. Capture Documents pertaining to Opportunity

This module is used to add documentation for the captured opportunities. The user must enter details like opportunity name, document title, details for uploading the document and the public document check. The opportunity name, document title and the upload details are mandatory.

i. Manage Opportunity

This module is used to edit opportunities. The default view of this module is a list of all opportunities. The user can edit details like project enquired, customer name, target amount, source, address, country, state, city, pin code, email, contact number, the pursuit start date, the pursuit end date, status, probability and notes. The user reset the pursue team and assign the lead to any one of the selected team. The project name, customer name, city and status are mandatory details.

j. Manage Opportunity Tasks details

This module is used to edit tasks assigned to the captured opportunities. The default view of this module is a list of all opportunity's tasks. The user can edit details like task goal, status, percentage of completion, assigned employee and additional notes. The start date and end date are not editable. The task goal, status and assigned to are mandatory fields and cannot be left blank.

k. Manage Opportunity Interaction details

This module is used to edit the interaction details for the captured opportunities. The default view of this module is a list of all opportunity's interactions. The user can edit details like opportunity contact, interaction mode, date, time, place, cost and additional notes. The date is a mandatory field while adding the details for any opportunity. The task goal can not be edited.

l. Manage Opportunity Contact details

This module is used to edit contact details for the captured opportunities. The default view of this module is a list of all opportunity's contacts. The user can edit details like name of the contact, designation, address, country, state, city, contact number, email id, pin code and the public contact check. The Opportunity name, the contact name, state and city are mandatory fields and can not be edited to be blank.

m. Manage Documents pertaining to Opportunity

This module is used to edit the documentation for the captured opportunities. The default view of this module is a list of all opportunity's documents. The user must enter details like opportunity name, document title, details for uploading the document and the public document check. The opportunity name, document title and the upload details are mandatory and can be left blank.

n. Re-Assign Opportunities

This module is used to reassign the currently active opportunities. The default view of this module is the list of all active opportunities. The user must first select an opportunity. The user can then reset the office, the pursuit team and reassign the opportunity to another employee.

o. Re-Assign Tasks

This module is used to reassign the currently active tasks. The default view of this module is the list of all active tasks. The user must first select a task. The user can then reset the office and reassign the task to another employee.