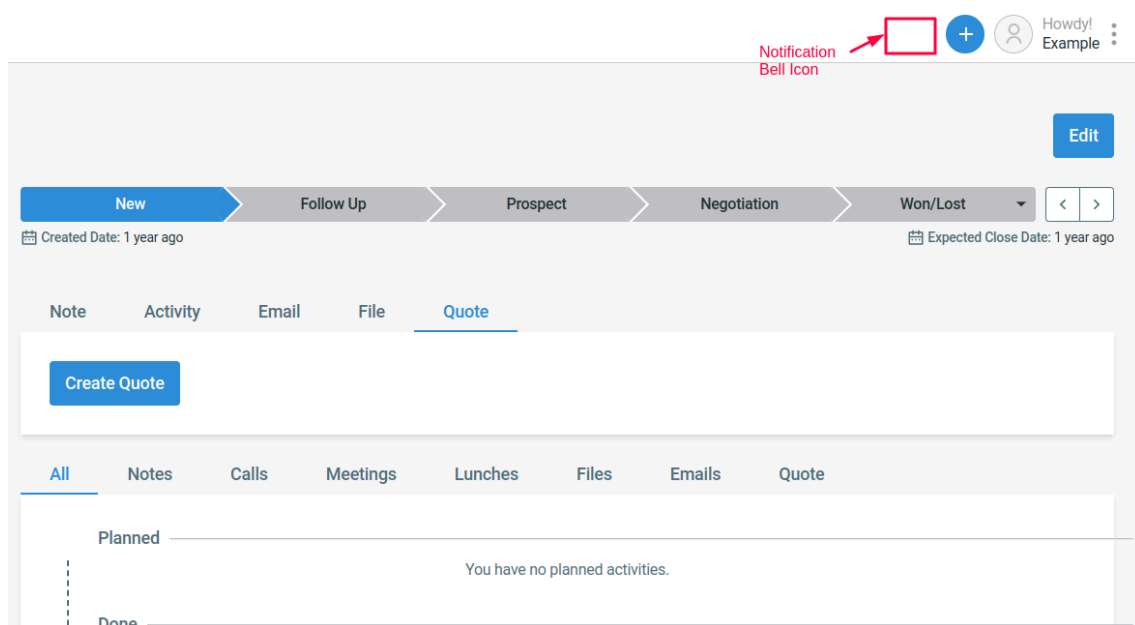


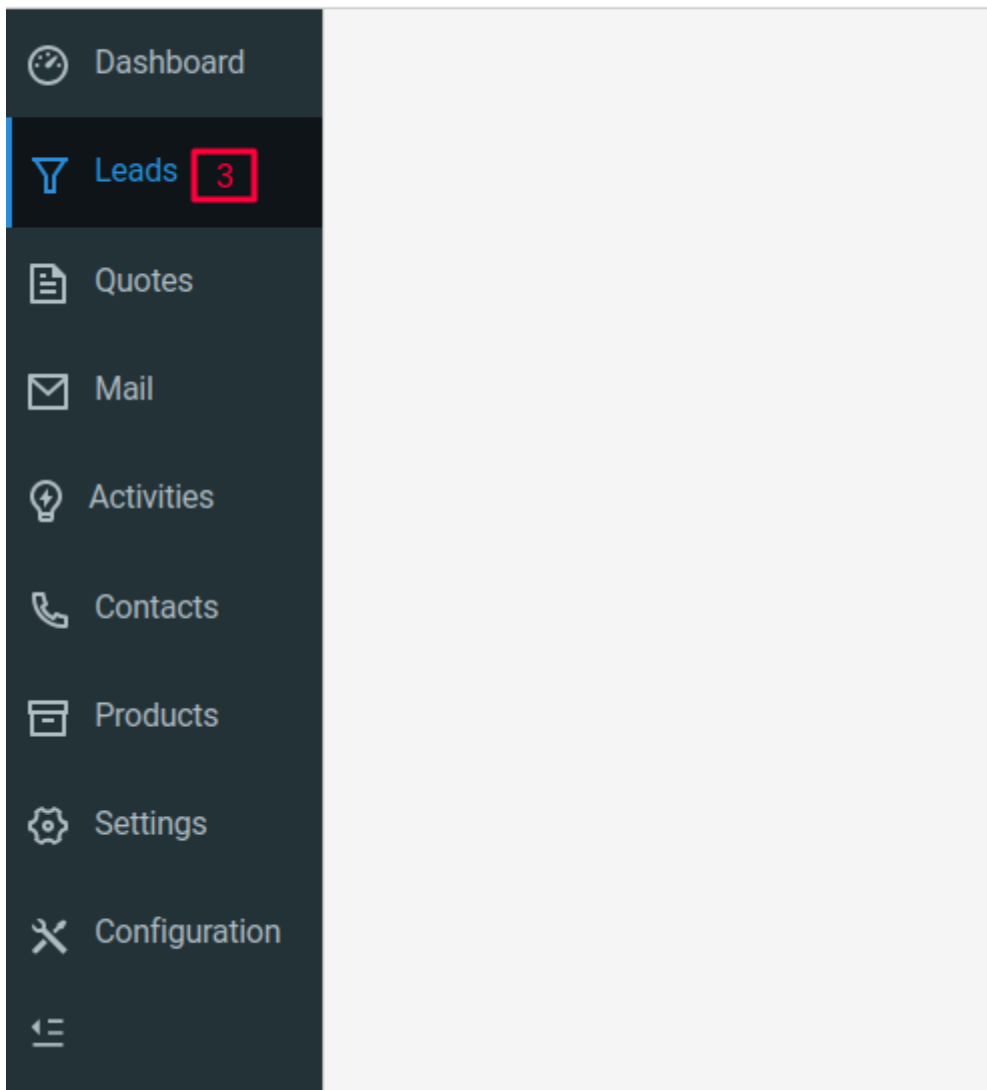
Krayin CRM Customization

Point -1 - Notification

For all the leads that are generated via web form, a notification will be received by the Admin on the Admin dashboard under the bell icon.



Also, on the "Lead" icon, the total count of unread leads will be displayed in red.



Point -2 - Source Field

For the lead generated via Web forms, there is a "Source" field already available in the CRM that provides the source information like - Web, Email, Direct, etc.

We can customize that for you to provide the website Name and URL in the source field from which the lead is generated.



Dashboard

Leads

Quotes

Mail

Activities

Contacts

Products

Settings

Configuration

Dashboard / Leads / Lead From Web Form

Lead From Web Form

Details

Lead has been rotten for 574 day(s)

Title	Lead From Web Form
Description	Lead From Web Form
Lead Value	\$89,000.00
Source	abc.com
Type	New Business
Sales Owner	Example Admin
Expected Close Date	2022-10-05 00:00:00

Point -3 - Send Quote Invoice button

Under the "Lead", a form will be provided with the following fields - Name, Price, Tax, and Tip.

Dashboard / Leads / Lead From Web Form

Lead From Web Form

Lead has been rotten for 574 day(s)

Title

Lead From Web Form

Description

Lead From Web Form

Lead Value

\$89,000.00

Source

Web Form

Type

New Business

Sales Owner

Example Admin

Expected Close Date

2022-10-05 00:00:00

Contact Person

Name

sanjay

Email

sanjay@krayin.com (work)

New

Follow Up

Prospect

Negotiation

Created Date: 1 year ago

Note

Activity

Email

File

Quote

Create Form

All

Notes

Calls

Meetings

Lunches

Files

Emails

Quote

Planned

You have no planned activities.

Done

You have no done activities.

Form Information

Name *

Example Admin

Price *

Tax *

Tip

Start typing to search records

For this form, the admin will be provided with 2 buttons - Send Quote and Send Invoice.

Send Quote -

On tapping this button, the quote will be sent to the client on his email ID along with the payment link.

We will integrate the Stripe payment method for the payments.

Once the payment is received, the lead status will be updated to "Won".

If the payment is not done by the expected close date, the lead status will automatically be changed to "Lost".

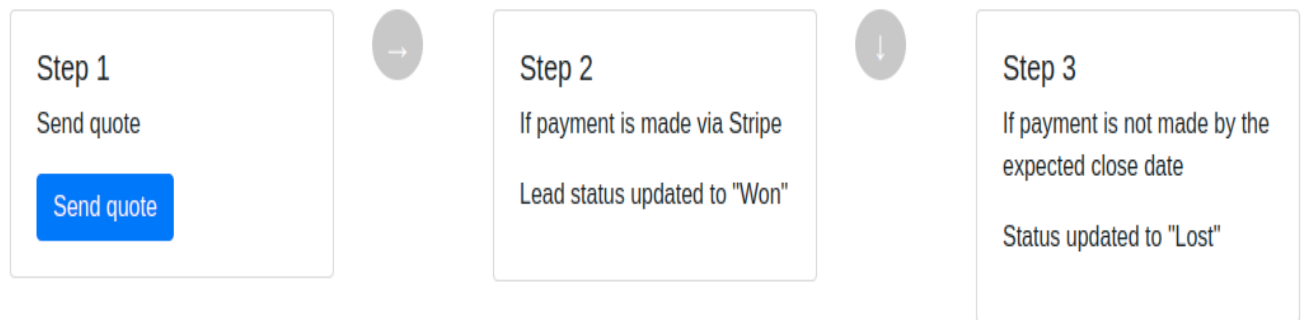
Name

Price

Tax

Tip

Flow Diagram



Send Invoice -

Once the payment is done and received, the Admin can tap this button to send the Invoice to the customer via email.

Name

Price

Tax

Tip

Contact Person Form

By default, the following field types are available for the attributes that can be created for the Person form -

Krayin

Dashboard / Settings / Attributes / Create Attribute

Create Attribute

Save as Attribute Back

Code *

Name *

Entity Type *

Lead

Type *

Text

Textarea

Price

Boolean

Select

Multiselect

Checkbox

Email

Address

Phone

Lookup

Datetime

Date

Image

File

Apart from these fields, you also want to have “Time” and “Number” fields that we can add as a part of customization.

Further, these created attributes will be available for the Contact person form and web forms.

Web Form

As of now, In the web form, you can create the field Types as follows -

- Select
- Date
- Time
- Text
- Number
- Text Area

Lead Filter

The leads can be sorted based on the “Pickup Date” and “Pickup Time” via filter.

The screenshot displays the Krayin CRM interface. On the left is a dark sidebar with navigation links: Dashboard, Leads, Quotes, Mail, Activities, Contacts, Products, Settings, and Configuration. The main area shows the 'Leads' section with a search bar and tabs for All, New, Follow Up, Prospect, Negotiation, Won, and Lost. A table lists leads with columns: ID, Sales Person, Subject, Lead Source, Lead Value, Contact Person, Stage, and Expected. A 'Filter' sidebar on the right allows filtering by ID, Sales Person, Subject, Tags, Lead source, Lead Value, Contact Person, Expected Close Date, and Created Date. The table contains 10 leads, with the first lead (ID 10) highlighted in pink.

ID	Sales Person	Subject	Lead Source	Lead Value	Contact Person	Stage	Expected
10	Example Admin	test	Email	\$100.00	Anant	New	22 May 20
9	John	sample	Web	\$3,434.00	sanjay	Negotiation	29 Sep 20
8	Example Admin	Example	Web	\$1,212.00	sanjay	Prospect	28 Sep 20
7	John	demo	Direct	\$12,300.00	Vártei Mádálina	Follow Up	20 Sep 20
6	Example Admin	Test	Web	\$78,500.00	Vártei Mádálina	New	26 Sep 20
5	Example Admin	NFT marketplace	Direct	\$6,788.00	sanjay	Won	26 Sep 20
4	Example Admin	Lead From Email	Web	\$458.00	sanjay	Negotiation	08 Sep 20
3	Example Admin	Lead From Web Form	Email	\$45.00	Boanta Cornelia Iia	Prospect	07 Sep 20
2	John	Lead For Test	Email	\$2,300.00	Dragan George	Follow Up	07 Sep 20
1	Example Admin	Lead From Web Form	Web Form	\$89,000.00	sanjay	New	05 Oct 20

Lead Status

As discussed, we will remove the “Prospect” and “Negotiation” status of the lead.



Leads

While creating the lead, you need to fill in three different sections - Details, Contact Person, and Driver Information.

The screenshot shows the 'Create Lead' form interface. At the top, there is a breadcrumb trail: 'Dashboard / Leads / Create Lead'. Below this is the title 'Create Lead'. There are two buttons: 'Save as Lead' (blue) and 'Back' (grey). Below the buttons are three tabs: 'Details' (blue underline), 'Contact Person', and 'Driver Information'. The 'Details' tab is active and highlighted with a red rectangular border. Below the tabs, there are two input fields: 'Title *' (with a red asterisk) and 'Description'. The 'Title' field is a single-line text input, and the 'Description' field is a multi-line text input.

The “Details” section will contain the below-mentioned information -

Details

Contact Person

Driver Information

Title *

Description

Lead Value (\$) *

Source *

Select

Type *

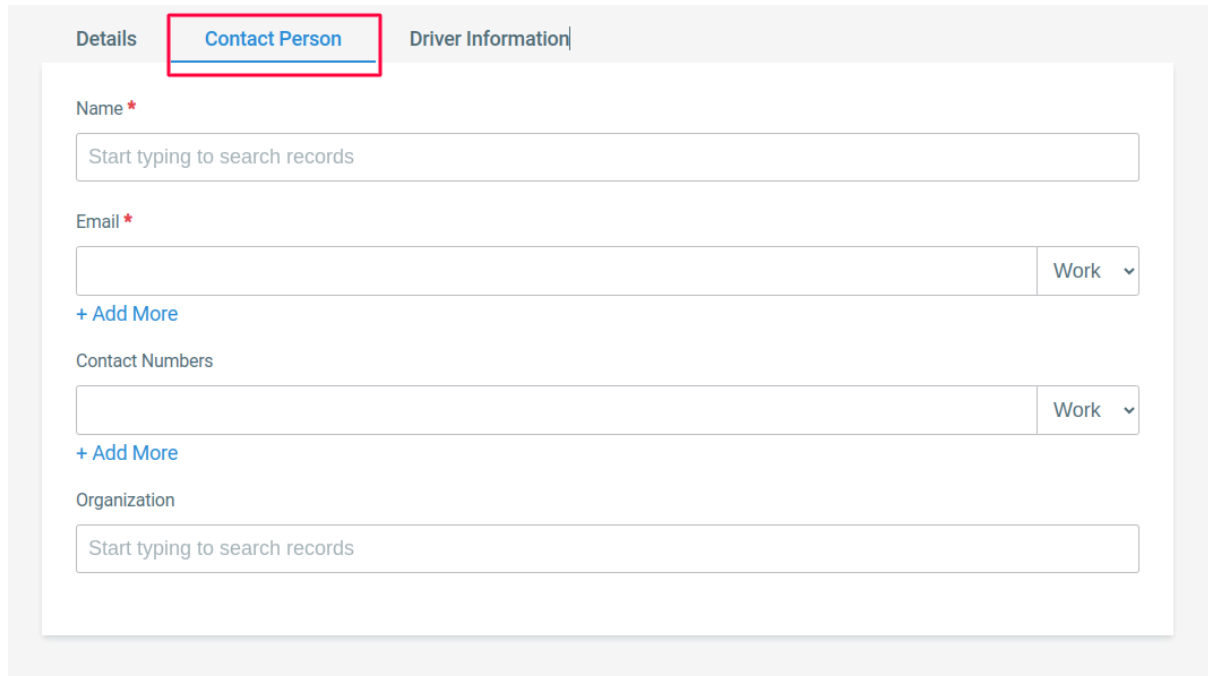
Select

Sales Owner

Select

Expected Close Date

The “Contact Person” section will contain all the fields related information -



The screenshot shows a form with three tabs: 'Details', 'Contact Person', and 'Driver Information'. The 'Contact Person' tab is selected and highlighted with a red box. Below the tabs, there are four sections, each with a label and a search bar:

- Name ***: A search bar with the placeholder text 'Start typing to search records'.
- Email ***: A search bar with the placeholder text 'Start typing to search records' and a dropdown menu labeled 'Work'.
- Contact Numbers**: A search bar with the placeholder text 'Start typing to search records' and a dropdown menu labeled 'Work'.
- Organization**: A search bar with the placeholder text 'Start typing to search records'.

Each search bar has a '+ Add More' link below it.

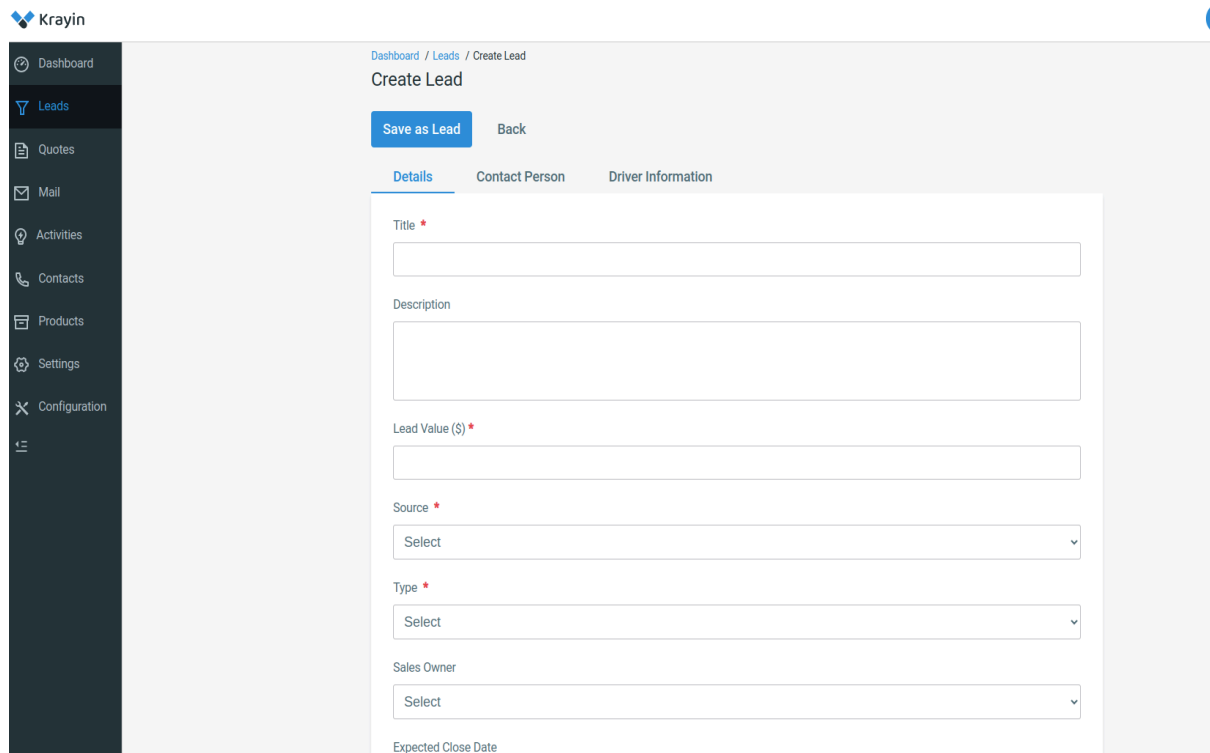
All the fields suggested by you will come under the “Contact Person” form.

■ Lead Fields Front End & Backend

- **Service Type** (Select)
 - One Way Trip To Airport
 - One Way Trip From Airport
 - Round Trip To Airport
 - Round Trip From Airport
 - One Way Trip Point To Point
 - Round Trip Point To Point
 - Hourly Service
- **Vehicle Type** (Select)
- **Pickup Date** (Date Picker)
- **Pickup Time** (Time Picker)
- **Pickup Location** (Text)
- **Dropoff Location** (Text)
- **Pickup Airport** (Only for One Way Trip From Airport) (Text)
- **Dropoff Airport** (Only for One Way Trip to Airport) (Text)

Driver Information

At the CRM end, we can remove the “Product” section and provide you with the “Driver Information” section.



The screenshot displays the Krayin CRM interface for creating a new lead. On the left is a dark sidebar with navigation links: Dashboard, Leads (highlighted), Quotes, Mail, Activities, Contacts, Products, Settings, and Configuration. The main content area is titled 'Create Lead' and includes a breadcrumb trail 'Dashboard / Leads / Create Lead'. Below the title are 'Save as Lead' and 'Back' buttons. Three tabs are visible: 'Details' (active), 'Contact Person', and 'Driver Information'. The 'Details' tab contains the following fields: 'Title' (text input), 'Description' (text area), 'Lead Value (\$)' (text input), 'Source' (dropdown menu), 'Type' (dropdown menu), 'Sales Owner' (dropdown menu), and 'Expected Close Date' (text input).

Under this driver information, we can provide you with all the additional fields.

- **Driver Name**
- **Driver Phone**
- **Cost**
- **Tax**
- **Gratuity**
- **Extra Addons**
- **Total Cost**
- **Source of Lead**

