

ADITYA SOFTWARE SOLUTIONS

Off. G-5,Shyam Nivas L.B.S. Marg , Ghatkopar (W) , Mumbai - 400086

Reg Add: 4/404,Hema Park ,Veer Savarkar Marg,Bhandup (East)-Mumbai - 400042

Cont. 9029847163, 9987077920 , Email :aditya.software.solutions@gmail.com, www.oaditya.in

GSTIN No.: 27AKEPS3572M1ZK PAN NO.: AKEPS3572M MSME Reg.No.MH18D0210024

Customize CRM for Life insurance agency - Investment service Providing Company - Financial consultant Company

Main Menu & Dashboard

Aditya Software Solutions CRM

Welcome, Admin Logout

Home

Menu



Company



Master



Data Entry

Follow UP

NOTE	Calling Date	Employee	Customer	Discussion	Follow Up	STATUS
PROSPECT	06-JAN-21	Mani	Rajeev Menon	Photo uploaded but why again	08-JAN-21	CLOSE
MF Business	18-FEB-21	Prajakta	Shweta Menon	Form Filled & Submitted in MFU.	19-FEB-21	CLOSE
PROSPECT	18-FEB-21	Vandana	Shelfali	Care Advantage form filled & portability mail sent her for send insurance co. - She will send	19-FEB-21	OPEN
PROSPECT	22-FEB-21	Vandana	Bhupinder	Called Bhupinder Sir for LIC Forms - Call not received	22-FEB-21	OPEN
PROSPECT	22-FEB-21	Vandana	Ronak	4 times Called Ronak for Marine details & Invoice copy sent to LNK - Quotation received & sent to Ronak Sir & updated him to Pay - 2.15 called Ronak sir for payment pending - He said will do	22-FEB-21	CLOSE
PROSPECT	20-FEB-21	Vandana	Shelfali	Some Bank issue from her Bapat account - updated her to pay from Soman account - Payment done	22-FEB-21	OPEN
PROSPECT	22-FEB-21	Vandana	Ronak	-	22-FEB-21	CLOSE
CLAIM	22-FEB-21	Vandana	Frazer	Call Frazier for pending requirements - He will send tomorrow	23-FEB-21	OPEN

1 - 8 Next

Prospect Detail

Enter On	Customer Name	Mobile No.	Meeting Dt	Product Name	Business Type	Status
29/05/21	Sachin Mukund Bapat	9867334848	29/05/21	Care Advantage Individual	General Insurance	OPEN
28/05/21	Hardik Kishor Motta	9820994862	27/05/21	Corona Kavach	General Insurance	OPEN
27/05/21	AMITKUMAR DHIMAN	9821247828	27/05/21	Jeevan Umang	Life Insurance (LIC / Pvt.)	OPEN
27/05/21	Pradeep Pandey	9768866837	27/05/21	Term	Life Insurance (LIC / Pvt.)	OPEN
21/05/21	Sanjay Shambhulal Bhanushali	9321026769	20/05/21	Demat	Mutual Fund	OPEN
21/05/21	Komal Rajesh Heffa	8356044378	21/05/21	Care + NCB Individual	General Insurance	OPEN
21/05/21	Deepak Pandurang Patil	9821572056	21/05/21	Care + NCB Individual	General Insurance	OPEN
21/05/21	CHERRYLOBO	9870529633	21/05/21	Care + NCB Individual	General Insurance	OPEN
21/05/21	Sharda Sanjay Bhanushali	9699526769	20/05/21	CAN	Mutual Fund	OPEN
21/05/21	Sharda Sanjay Bhanushali	9699526769	20/05/21	Demat	Mutual Fund	OPEN

1 - 10 Next

Daily Note

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Master Menu

Aditya Software Solutions CRM

Welcome: ADMIN Logo

Home

Menu



Company



Master

Customer Group

Customer Master

Employee Master

Product Master

Document List



Data Entry

Follow UP

NOTE	Calling Date	Discussion	Follow Up	STATUS
PROSPECT	06-JAN-21	loaded but why again	06-JAN-21	CLOSE
MF Business	18-FEB-21	led & Submitted in MFU.	19-FEB-21	CLOSE

Prospect Detail

Enter On	Customer Name	Mobile No.	Meeting Dt	Product Name	Business Type	Status
29/05/21	Sachin Mukund Bapat	9867334848	29/05/21	Care Advantage Individual	General Insurance	OPEN
28/05/21	Hardik Kishor Motta	9820994862	27/05/21	Corona Kavach	General Insurance	OPEN

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Master List View

Aditya Software Solutions CRM

Welcome: ADMIN Logout

Home > Master

Q- Go Rows 5 Actions Create

Person Name	Nickname	Father Spouse	Mother's	Group ID	Group Name	DOB	Mobile No.	Res Tel No	Off Tel No	E Mail ID Personal	Email ID Communication	Occupation	PAN
 Rita Serrao	-	D'Souza Joseph Mary	-	S211	Rita Serrao	08-NOV-59	9821161391	-	-	rita_811@hotmail.com	-	-	-
 Saylee Phatak	Saylee Phatak	Pravin Phatak	Shobhna Phatak	P049	NILESH PRAVIN PATHAK	03-JUL-99	7045837544	-	-	-	pravinphatak@gmail.com	Student	GGRP0708M
 Shobhna Phatak	Shobhna Phatak	Tryambak Gokhale	-	P049	NILESH PRAVIN PATHAK	24-AUG-70	7506203816	-	-	-	pravinphatak@gmail.com	House wife	AQOPP1411E
 KABIR MANMOHAN AGRAWAL	KABIR MANMOHAN AGRAWAL	NAREN MANMOHAN AGRAWAL	PAYAL NAREN AGRAWAL	A00028	Manmohan Agarwal	10-JAN-19	9594049490	-	-	-	dnsocks@hotmail.com	-	-
 Amrita Aditya Dhakras	Amrita	Shankar Kishnaji Desai	-	D080	Amrita Aditya Dhakras	09-JAN-82	9881204307	-	-	amritadhakras@gmail.com	-	-	AGYPD7734Q

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Products List View
















Aditya Software Solutions CRM

Welcome: ADMIN Logout

Home > Product

Q- Go Actions Create

Press F11 to exit full screen

Doc No	Product	Ins Co	Pay Link
 22	Student Travel	Care Health Insurance Ltd	https://www.careinsurance.com/rhicl/proposalcp/renew/index-care
 24	Pvt. Car	HDFC Ergo General Insurance Co. Ltd.	https://www.hdfcergo.com/renew-hdfc-ergo-policy
 25	Pvt. Car	Future Generali Insurance Co. Ltd.	https://general.futuregenerali.in
 27	Pvt. Car	The New India Assurance Co. Ltd.	https://www.newindia.co.in/portal/quickRenewPost/payment
 29	Travel Individual	Bajaj Allianz General Insurance Co. Ltd.	bajajallianz.com/general-insurance-renewal.html
 32	Health Guard Individual	Bajaj Allianz General Insurance Co. Ltd.	bajajallianz.com/general-insurance-renewal.html
 33	Top Up (Extra Care) Individual	Bajaj Allianz General Insurance Co. Ltd.	bajajallianz.com/general-insurance-renewal.html
 35	Mediclaime Individual	HDFC Ergo Health Insurance Ltd.	https://netinsure.hdfcergo.com/mOnlineProducts/healthOnline/Renewal/healthrenewal.aspx#
 41	GST	Accounts	-
 42	ITR Filing	Accounts	-
 43	IT Registration	Accounts	-
 44	Tally	Accounts	-
 45	Mediclaime Individual	The New India Assurance Co. Ltd.	https://www.newindia.co.in/portal/quickRenewPost/payment
 62	Account Statement	All	-
 81	Share - purchase	MFU	-

< 46 - 60 >

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Document List View

Aditya Software Solutions CRM

Welcome: ADMIN Logout

Home > DOCUMENT LIST

Q- Go Actions Create

Group Name = 'LIC-Govt. ACCIDENT BENEFIT' ☒ ☐

Group Name	Business Type	Document Name	Remark
LIC-Govt._ACCIDENT BENEFIT	Service	1)APPLICATION	-
LIC-Govt._ACCIDENT BENEFIT	Service	2) FORM NO 3772	-
LIC-Govt._ACCIDENT BENEFIT	Service	3) ALTRATION CHARGES 50+ GST	-
LIC-Govt._ACCIDENT BENEFIT	Service	4) ORIGINAL POLICY BOND	-
LIC-Govt._ACCIDENT BENEFIT	Service	5) PAN & AADHAR CARD	-

1 - 5

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Daily Task List View

Aditya Software Solutions CRM

Welcome: ADMIN Logout

Home > Daily Note

Q- Go Rows 5 Actions Create

Date	Customer Name	St Time	End Time	Job Type	To / From	Product	Particular	Assignor	Assignee	Status	Close Dt
 14/07/2021	HNR TECH PRIVATE LIMITED	10.08	10.09	Renewals	PSFilp	GMC	Tried calling Siddhi but her mobile ringing hence sent email and whats app	Amit Sir	Manikandan	Close	-
 14/07/2021	YASH SAMANI	10.06	10.07	Renewals	PSFilp	Hospital Cash	Spoke to Bhavini and told her to send email which we have sent to her email id	Rajendra Sir	Manikandan	Close	-
 13/07/2021	Shree Ganesh Graphics Pvt Ltd	9.52	9.53	Renewals	PSFilp	GMC	Spoke to Client and updated her about renewal and told her to share revised employee data for fresh quotes	Rajendra Sir	Manikandan	Close	-
 08/07/2021	Meenakshy Sridhar	2.29	2.3	New Business	NJ	Mutual Fund - Purchase	25 Lacs Purchase in ICICI Ultra Short Term Fund	Prajakta	Manikandan	Close	09/07/2021
 22/06/2021	SUNILA HANDE	5.06	5.08	Claims	Client Home	Maturity	Collected LIC Original Policy + Option Form and Requirements 901900756 / 901900757	Rajendra Sir	Manikandan	Close	-

1 - 5

Home

Customer Group

Party Master

Product Master

Daily Details

Claim Entry

Prospect Detail

Document Checklist

G-LIFE New Business

Mutual Funds New Business

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Insurance Claim Detail List View

Aditya Software Solutions CRM

Welcome: ADMIN Logout

Home > Claim

Q- Go Rows 5 Actions Create

Customer Name	Group Name	Group Id	St Time	End Time	Product	Insurance Co	Claim Type	Dr Name	Policy No.	Date of Intimation	Mobile No	Email ID
 Mukesh Pandurang Pednekar	Mukesh Pandurang Pednekar	P045	12.22	12.29	Care Advantage Individual	Care Health Insurance Ltd	Reimbursement	Madhusudan Davda	10245271	12-JUL-21	9930986093	-
 Parul Yogesh Dhulla	YOGESH DHANJI DHULLA	D00011	5.28	5.28	Care Advantage Individual	Care Health Insurance Ltd	Cashless	-	18964958	14-JUN-21	9833425909	yogesh.dhulla@gmail.com
 JAYANT P VORA	JAYANT P VORA	V00059	4.35	4.35	Mediclaime Individual	The New India Assurance Co. Ltd.	Reimbursement	Dr Vashisht Maniar	17010034209500004458	07-JUN-21	9920211082	pratik18295@gmail.com
 Disha Narayan Lalwani	Jijo G Lalwani	J01	10.02	10.02	Mediclaime Individual	The New India Assurance Co. Ltd.	Reimbursement	Preeti Shah	17010034209500004327	05-JUN-21	9825325558	narayan.lalwani@gmail.com
 Aju Charuvila Soman	Aju Charuvila Soman	S00542	6	6.51	GMC	Bajaj Allianz General Insurance Co. Ltd.	Reimbursement	Dr. Sekar	QG-21-1907-8402-00000031	11-MAY-21	8939546935	vnaren@aceexpressindia.com

Home

Customer Group

Party Master

Product Master

Daily Details

Claim Entry

Prospect Detail

Document Checklist

G-LIFE New Business

Mutual Funds New Business

release 1.0

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Prospect List View

Aditya Software Solutions CRM

Welcome: ADMIN Logout

Home > Prospect

Prospect

Q- Go Rows 5 Actions Create

Edit	Customer Name	Group Id	Mobile No.	Email	Meeting Date	Product Name	Ref By	Place	Business Type	Solution Given	Comments	Status	User Name	Clo
	Preksha K Chandra	C00024	9320911244	ketanchandra_2@yahoo.co.in	13/08/2021	Demat	-	-	Mutual Fund	-	-	-	PRAJAKTA	-
	CHANDRA BHANUSHALI	B001	9930836671	vrhanushali29@gmail.com	29/07/2021	Demat	-	-	Mutual Fund	-	-	-	PRAJAKTA	-
	Purvi Ketan Vira	V038	9892212435	ketanmvira@gmail.com	27/07/2021	Demat	Girish Vira	-	Mutual Fund	-	-	-	PRAJAKTA	-
	RITA P SAVLA	S083	9322903069	-	22/07/2021	Demat	-	-	Mutual Fund	-	-	-	PRAJAKTA	-
	Alka Varaiya	V00235	7208141282	-	10/07/2021	CAN	AKP	ON Call	Mutual Fund	-	-	-	PRAJAKTA	-

Home

Customer Group

Party Master

Product Master

Daily Details

Claim Entry

Prospect Detail

Document Checklist

G-LIFE New Business

Mutual Funds New Business

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Life Insurance New Business List

Aditya Software Solutions CRM

Welcome: ADMIN Logout

Home > LIFE

Q- Go Rows 15 Actions Create

Customer Name	Group Id	Mobile No.	Email	Create By	Enter On	St Time	End Time	Wealthmagic	Visualmagic	Excel Sheet (Master data)	On Servcer Drive Folder	Backup on OneDrive	Plan Presentation
 Anita Jiyo Lalwani	J01	9825325558	jiyo.lalwani@gmail.com	MANI	02-MAR-21	-	-	-	-	-	-	-	01-MAR-21
 Bhupinder Rawat	R051	9561450444	bhupsr@gmail.com	VANDANA	31-JAN-21	-	-	31-JAN-21	31-JAN-21	04-AUG-20	-	-	31-JAN-21

Home

Customer Group

Party Master

Product Master

Daily Details

Claim Entry

Prospect Detail

Document Checklist

G-LIFE New Business

Mutual Funds New Business

release 1.0

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Mutual Fund New Business List

Aditya Software Solutions CRM

Welcome: ADMIN Logout

Home > NBMF

Q- Go Rows 5 Actions Create

Customer Name	Group Id	Mobile No.	Email	Investment Category	Employee Name	Group Creation in Wealthmagic	Excel Sheet (Master data)	Category of Funds	Scheme Names	Lumpsum	SIP	
 Preksha K Chandra	C00024	9320911244	ketanchandra_2@yahoo.co.in	AMFI_Karta of HUF deceased_HUF Dissolved	Amit Sir	NO	-	Debt	-	NO	NO	-
 CHANDRA BHANUSHALI	B001	9930836671	vrbbhanushali29@gmail.com	Mutual Fund_Individual	Prajakta	NO	-	Debt	-	NO	NO	29
 RITA P SAVLA	S083	9322903069	-	AMFI_Karta of HUF deceased_HUF Dissolved	Prajakta	NO	-	Debt	-	NO	NO	23
 Alka Varaiya	V00235	7208141282	-	Mutual Fund_Individual	Prajakta	YES	-	Debt	-	YES	NO	10
 Chirag Varaiya	V00235	-	-	Mutual Fund_Individual	Prajakta	YES	-	Debt	-	YES	NO	10

Home

Customer Group

Party Master

Product Master

Daily Details

Claim Entry

Prospect Detail

Document Checklist

G-LIFE New Business

Mutual Funds New Business

release 1.0

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Mutual Fund Business Form Entry

Aditya Software Solutions CRM

Welcome: ADMIN Logout

Home > NBMF > MF Business

Creation of Client in CRM

Customer CD

5742

Customer Name

CHANDRA BHANUSHALI

Start Time

3.5

End Time

Investor Category

Mutual Fund Individual

Doc Dt

29/07/2021

Excel Sheet (Master data)

Enter Path on Drive Backup

Group Creation In Wealthmagic

NO

Employee Name

Prajakta

Resident Status

INDIAN

KYC Status

YES

Company

NJ

Account Opening Mode

E-Sign

Data Sheet Received

YES

Close Ticket

Funds Category & Name & Need

Form Filling date

29/07/2021

Final Submission date

30/07/2021

Form Approval date

31/07/2021

SIP

NO

Lumpsum

NO

SWP

NO

STP

NO

MF Scheme

Category of Funds

Debt

Scheme

Add Update Scheme

Documents List

Import Document List

no data found

Forms / Online Payment

Investment date

Investment Mode

Cheque

Bank Name

Account Number

IFSC Code

Investment Amount

New MF Follow Up

Create

Edit	Calling Date	Employee Name	Contact Person	Discussion	Action	Feed Back	Follow Up	Status	Start Time	End Time	Rejection Dt	Rel Reason	Requirement	Close Dt
	31-JUL-21	Prajakta	Vivek Bhanushali	Demat account has ben activated. Spoke with Vivek Sir, He said will speak with RMD			03-AUG-21	11.23						
	03-AUG-21	Prajakta	Vivek Bhanushali	Spoke with Vivek Sir, He said, physical MF transfer into Demat mode. Will arrange ORF form & send it to the client			06-AUG-21	11.31						

Excel

1 - 2

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Renewal List View

Home > Renewal






Renewal

Q-

Go

Actions ▾

Create

Edit	Enter Date	Customer Name	Mo No	Email	D O B	Yrs.	Employee Name	Policy type	Company name	Product name	Policy No	Sum Assured
	17/07/21	SUSHIL TULASKAR	91		01-JAN-90	31	Ashutosh	Fire	Bajaj Allianz General Insurance Co. Ltd.	Fire Insurance	PL-NO OG-19-1905-4040-00000031	2430000
	22/05/21	MUKESH ARJUN JAISINGH	91-	mukesh_jaisingh@hotmail.com	18-SEP-77	43	Ashutosh	Health	Bajaj Allianz General Insurance Co. Ltd.	Other	PL-NO OG-22-1905-4058-00000001	5500000
	13/07/21	ADWAIT MORWEKAR	919323912244	amorwekar@bsraffiliates.com	01-JAN-90	31	Ashutosh	Fire	Bajaj Allianz General Insurance Co. Ltd.	Fire	PL-NO OG-21-1907-4030-00000013	2980000
	03/07/21	Neha Umesh Ghai	91		27-JAN-83	38	Ashutosh	Health	Care Health Insurance Ltd	Assure	PL-NO.10687915	1000000
	03/07/21	Umesh Sushilkumar Ghai	919820011226	UMESH.GHAI@ALLARCHINDIA.COM	24-JAN-83	38	Ashutosh	Health	Care Health Insurance Ltd	Top Up (Enhance) Individual	PL-NO.10686816	2500000