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

Main Menu & Dashboard

Home

Menu







Company

Aditya Software Solutions CRM

Data Entry

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	Shefali	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	Shefali	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	∨andana	Frazer	Call Frazier for pending requirements - He will send tomorrow	23-FEB- 21	OPEN

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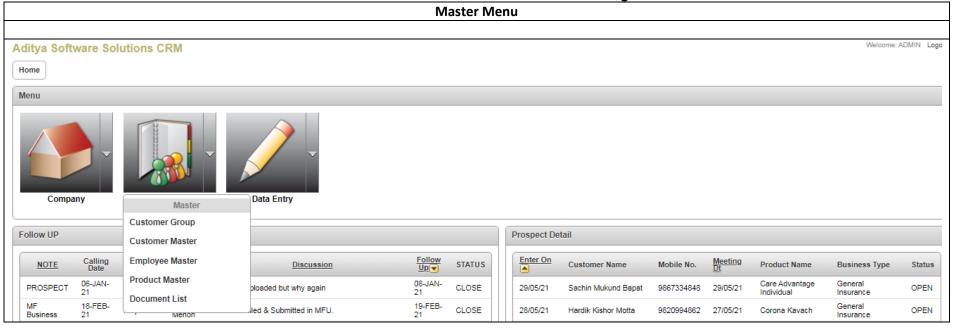
Enter On	Customer Name	Mobile No.	Meeting Dt	Product Name	Business Type	Status
29/05/21	Sachin Mukund Bapat	9867334848	29/05/21	Care Advantage Individual	General Insurance	OPEN
28/05/21	Hardik Kishor Motta	9820994862	27/05/21	Corona Kavach	General Insurance	OPEN
27/05/21	AMITKUMAR DHIMAN	9821247828	27/05/21	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	CHERRYL LOBO	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 3

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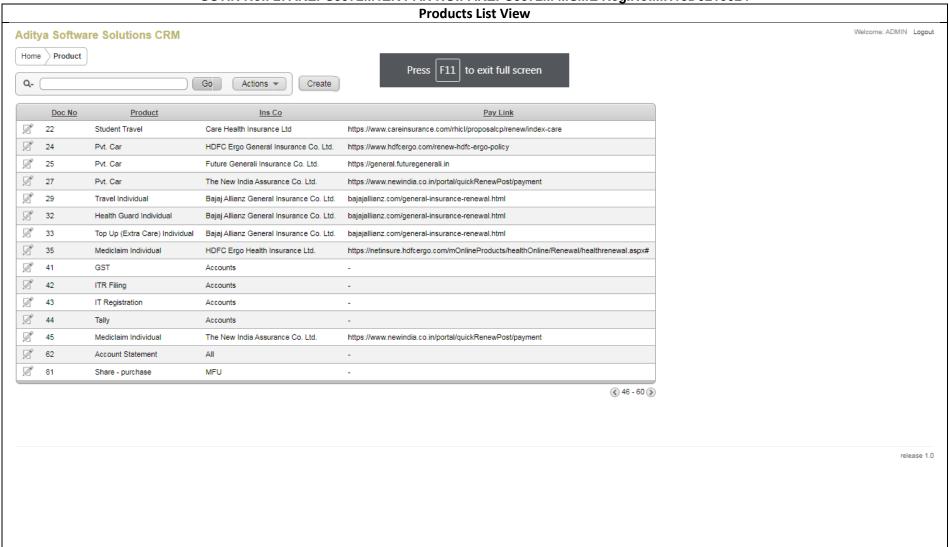
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Master List View Welcome: ADMIN Logout **Aditya Software Solutions CRM** Home Master Q-Rows 5 Go ✓ Actions ▼ Create Father Spouse E Mail ID Personal Email ID Communication <u>Nickname</u> Res Tel No **Group Name** DOB Mobile No. Off Tel No PAN Person Name Mother's Group ID Occupation D'Souza Joseph Mary Rita Serrao S211 Rita Serrao 9821161391 rita_811@hotmail.com NILESH PRAVIN PATHAK Pravin Phatak Shobhna Phatak 03-JUL-99 Saylee Phatak 7045837544 Saylee Phatak P049 GGRP0708M pravinphatak@gmail.com Student Shobhna Phatak Tryambak Gokhale 24-AUG-70 Shobhna Phatak P049 AQOPP1411E 7506203816 pravinphatak@gmail.com House wife NAREN MANMOHAN AGRAWAL KABIR MANMOHAN KABIR MANMOHAN PAYAL NAREN 10-JAN-19 Manmohan A00028 9594049490 dnsocks@hotmail.com Agarwal AGRAWAL AGRAWAL AGRAWAL Shankar Kishnaji Desai Amrita Aditya Dhakras Amrita Aditya 09-JAN-82 Amrita D080 9881204307 amritadhakras@gmail.com -AGYPD7734Q release 1.0

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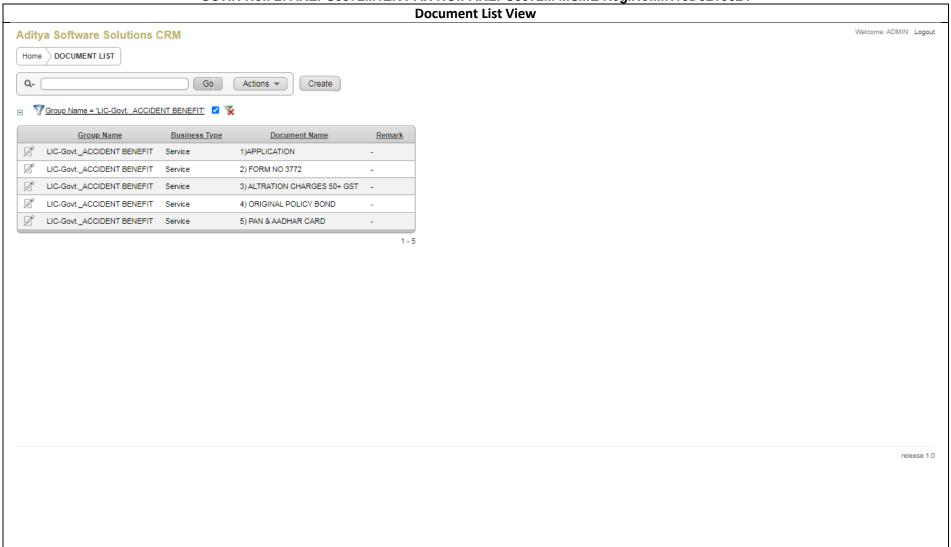
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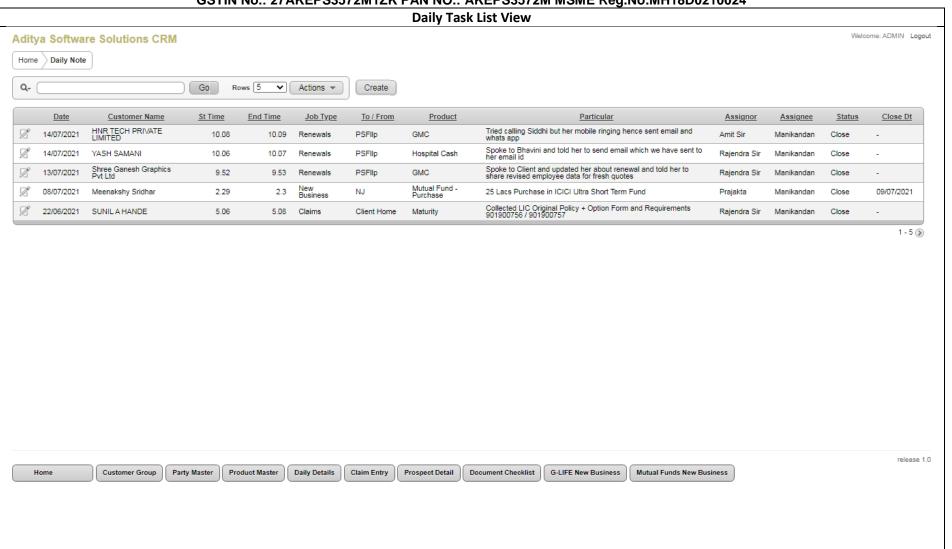
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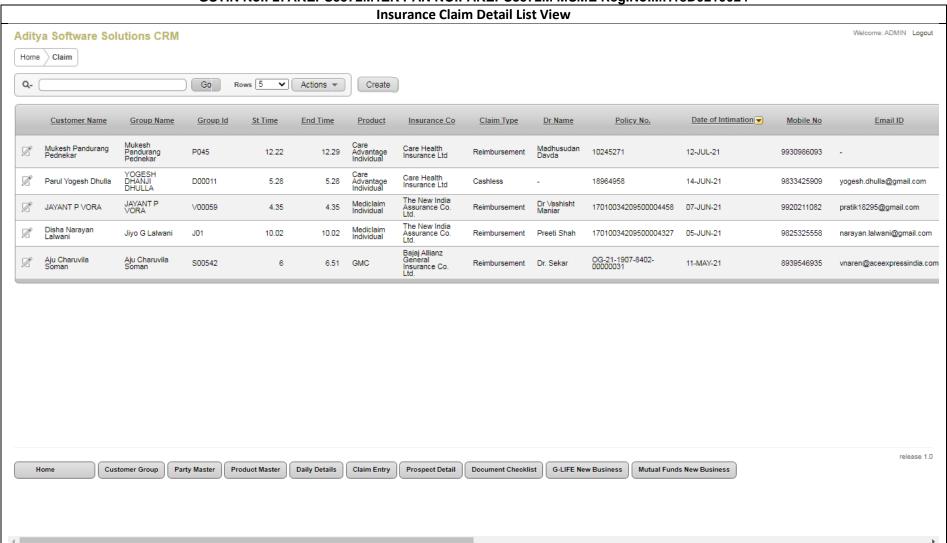
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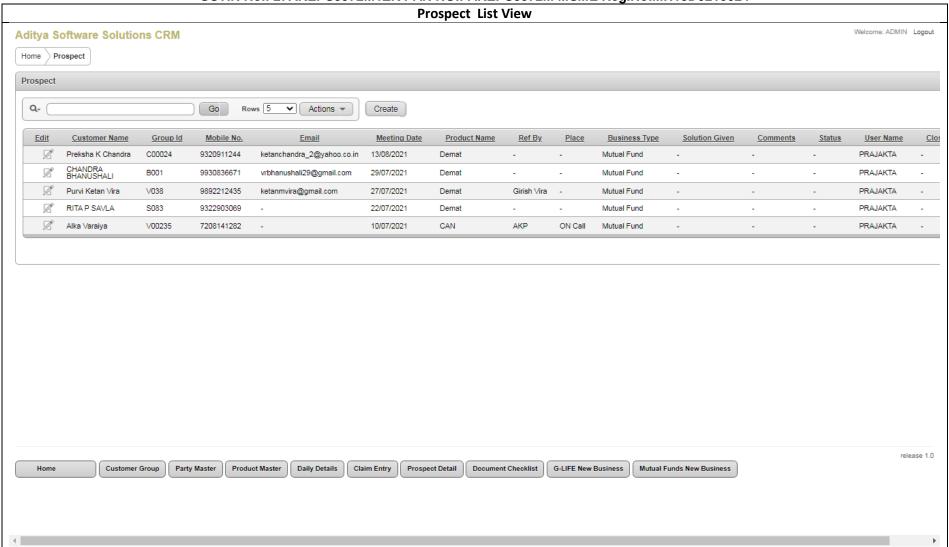
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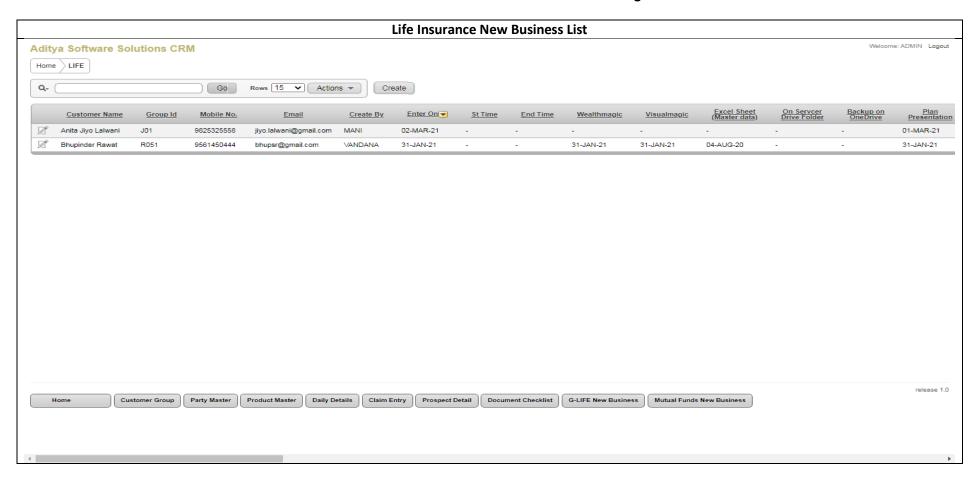
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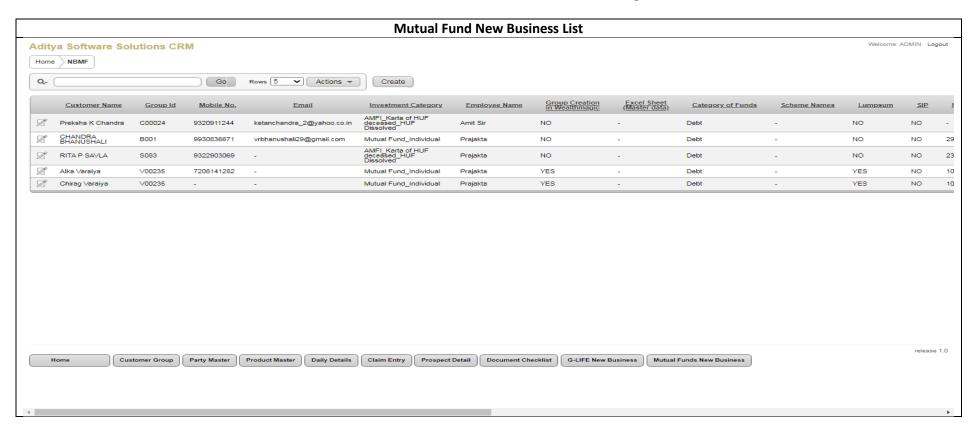
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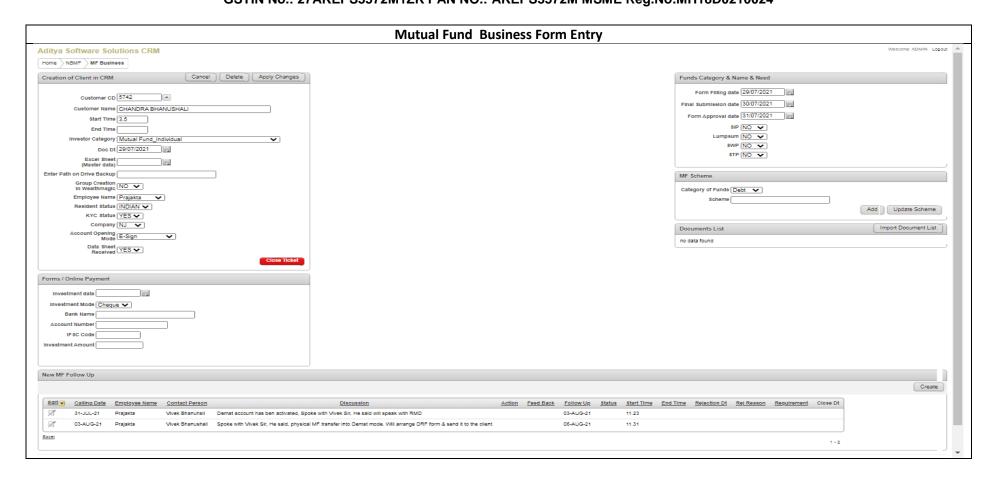
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