

LMS

May 28 2019

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7. Sales_Rep_Details
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User Name

Password

Login

9:30

Dashboard

Hello Ashish!!

Select Originator BU

Select Origin

Select Target BU

Select Target

Select Rep

All

Start Date

12/12/2018

15

End Date

12/12/2018

15

Refine Results

Total Leads :

35

Approved Leads :

25

Rejected Leads :

10

Pending Leads :

5

Extract Report

Home

View Leads

Add Lead

9:30

Dashboard

Hello Ashish!!

Select Originator BU

Select Origin

Select Target BU

Select Target

Select Rep

Olive (SR)

Start Date

12/12/2018

15

End Date

12/12/2018

15

Refine Results

Total Leads :

35

Approved Leads :

25

Rejected Leads :

10

Pending Leads :

5

Extract Report

Home

View Leads

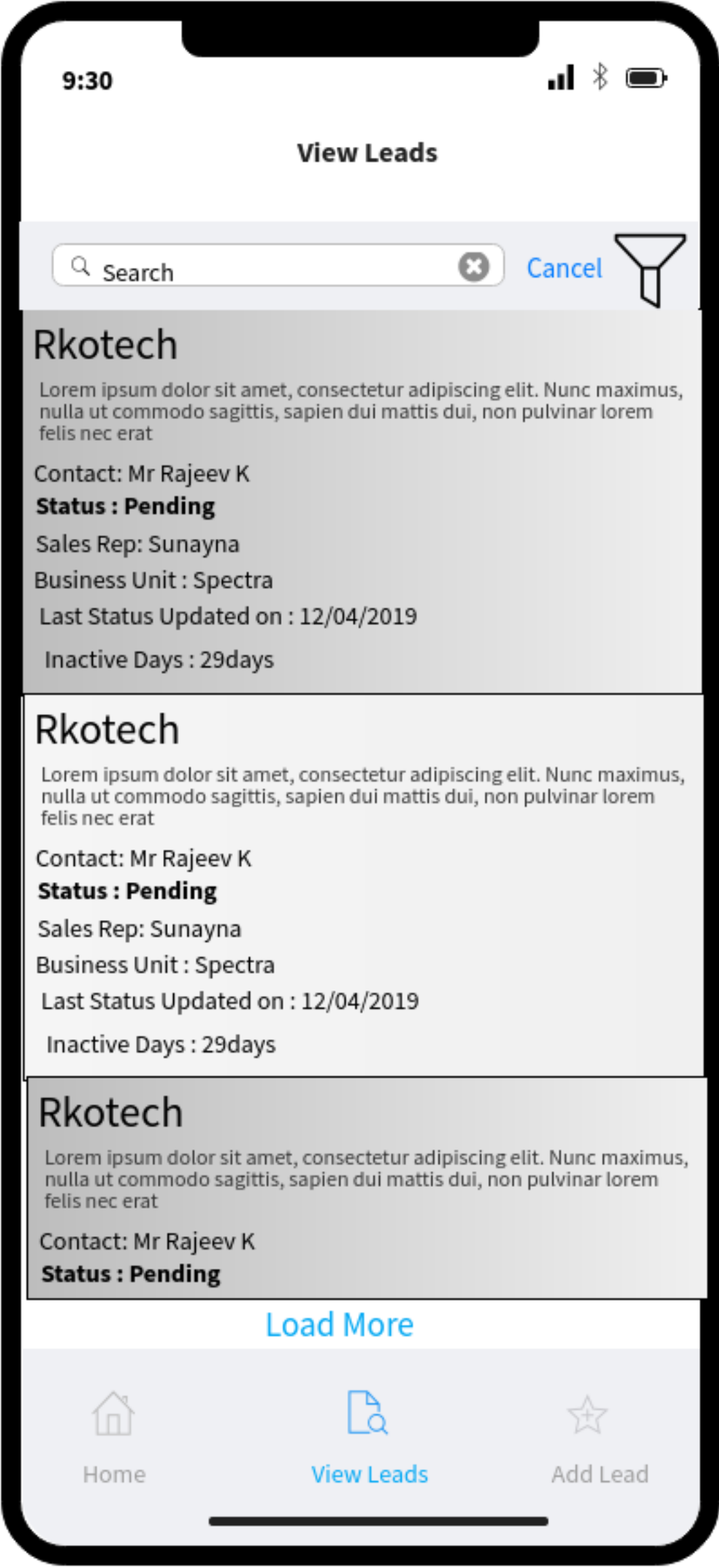
Add Lead

My BU (Internal): Leads generated by my team (for same BU)

My BU (External): Leads generated by my team (for other BU)

Cross BU: Leads which are generated for my BU by others

Self : Leads which I have contributed



The filter overlay is a white box with a black border. It contains several filter categories, each with a dropdown menu: 'Status' (set to 'Approve'), 'Tenure' (set to 'Less than a Month'), 'Location' (with 'Select Country' and 'Select State' dropdowns), 'BU Selection' (with 'Select BU' and 'Select Rep' dropdowns), 'Industry' (set to 'Select Industry'), and 'Source' (set to 'Web'). To the right of these filters is a large black arrow pointing right and a funnel icon. At the bottom of the overlay are two blue buttons: 'Reset' and 'Apply'. Below the overlay, a 'Select Rep' dropdown menu is visible.

9:30

< Back

Leads Details

Date : 12/12/2018

Source : Web

Tenure : Less than a Month

Rkotech

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc maximus, nulla ut commodo sagittis, sapien dui mattis dui, non pulvinar lorem felis nec eratLorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc

Contact Information

Mr Rajeev Khandelwal (VP Head)

Bangalore, Karnataka, India

rajeevk@rkotech.com

+91 9765896419

Sales Representative

Sunayna Rao

Business Unit Handling

Spectro

Status

Select Status

Estimated Budget

10,000

USD

☒ Assign Rep

Select Rep

☒ Modify BU

Select BU

+ ADD

☒ Modify BU

Spectro X

Since pending from long time, kindly review and revert

Update Lead

Home

View Leads

Add Lead

>

Lead History

Owner	Comments
Sunayna (SR)	Created Lead assigned to...
Ashish(BU Head)	Rejected Lead
Lionel (BD)	ReAssigned it to Spectra

Last Status Updated on

10/03/2019

Last Status Updated on

35 days

- BD can modify existing Lead, with the below capability
- > Directly Assign to Some Rep
 - > Edit / Add Estimated Budget
 - > Modify BU - either by removing to whom it is assigned to OR adding new BU in scope
 - > Send Manual Notification Message to Owner

[< Back](#)

Add Lead

Date : 12/12/2018

 15

Source

Web

Customer Name

RkoTech Company

Requirements / Project

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc maximus, nulla ut commodo sagittis, sapien dui mattis dui, non pulvinar lorem felis nec eratLorem ipsum dolor sit a

//

Tenure

Less than a Month

Contact Information

Name

Rajeev Khanelwal

Email

rajeevk@rkotech.com

Phone

9765896413

Location

Select Country

Select State

Business Unit

Select BU

+ ADD

Atlas X Spectro X Land X

Industry

Select Industry

Estimated Budget

10,000

USD



Self Approve

Select Rep

Create Lead



Home



View Leads




Add Lead

9:30



Sales Rep

 Search



Cancel



Spectra

Sunayna



Approved Leads : 20

Spectra

Sijo V



Approved Leads : 20

Spectra

Sneha M



Approved Leads : 20

Creaform

Olive



Approved Leads : 20

Creaform

Sandeep



Approved Leads : 20

Creaform

Daniel



Approved Leads : 20

Cameca

Angel Garci



Approved Leads : 20

[Load More](#)



Home



View Leads




Add Lead

9:30



Sales Rep

 Search



Cancel



Spectra

Sunayna



Approved Leads : 20

Spectra

Sijo V



Approved Leads : 20

Spectra

Sneha M



Approved Leads : 20

Creaform

Olive



Approved Leads : 20

Rejected Leads : 10

Assigned Leads : 10

Roles : Add Leads, View Leads, is Business Head

Full Name : Olive Silva

☒ Reset Password

☒ Delete User

Update



Home



View Leads



Add Lead

9:30



Create User

Employee Email Id (Unique)

ashishr@ametek.com



Sales / Service

Reporting To

Select BU



Select BU Head



is Business Unit Head

Select BU



is Business Development

Create User



Home



View Leads



Add Lead