GOCRM

Leads:

Add New Lead

View All Leads: Take Action: Change owner, Delete; Add New Lead; Custom View.

Edit Lead: Hote Lead, Cold Lead, View previous free trials, Request free trials , SMS, Email, Noteline, Add task, Convert to Client.

Noteline

Clients:

View All Clients: Take Action: Change owner, Delete; Custom View.

Edit Client: SMS, Email, Noteline, View sent mails, billing.

Billing:

View Bills: show: All, Approved, Unapproved; Option for Approve & Send Invoice.

Onclick bill: Invoice.

Report & Analysis:

General Report:

Filters: Createdate, Modifieddate, Callbackdate, Leadstatus, Leadsource, Leadresponse, Leadowner.

Service Report:

Filters: Freetrialdate, Type, Product, Approved, Send tips today, Leadowner.

(Both have option of export.)

Task & Reminders:

View Tasks: Add New Task, Delete Tasks.

Edit Task

Wall & Broadcast:

Share posts

Setup:

Masters: Contact Source, Contact Status, Contact Response, Location/City, Country, State, Product.

Profile: Add Profile, View Profile, Access Control.

Administration: Add a User, All Users.

Reports: User performance.

Lead Allotment: Bulk lead upload.

Allot Leads: Type of Lead, Get User, Allot.

Users:

View Users: Add New User, Delete.

Utilities:

Approve Free Trials: Approve Selected, Deny Selected.

* Search (in all above pages wherever required)