

Dated: 09-08-2024

CRM Testing

My Leads Tab

- Two lead with same email or Phone # cannot be added
- When you add a lead, we don't have drop down options for lead source

Add Lead

×

First Name	Last Name
<input type="text" value="Muhammad Suleman"/>	<input type="text" value="Shahid"/>
Email	Gender
<input type="text" value="sulemanshahid@gmail.com"/>	<input type="text" value="Male"/>
Phone Number	Lead Source
<input type="text" value="01234567890"/>	<input type="text" value="Walk In"/>

- When you edit the lead, you can edit all information except the lead source

Edit Lead

×

First Name

Asad

Email

asadabbas@gmail.com

Phone Number

01234567890

Last Name

Abbas

Gender

Male

Update

Close

- University and its programs can only be added by the admin

- When we go for follow up update, does the status section is giving us option to update lead status as well?

Follow-Up Details

Name

Asad Abbas

Status

-- Lead Status --

Reminder Date

12/08/2024

Description

Save

Close

- Is this entry correct? I have given a date for next follow up and a description, that what will be the details of follow up and then the lead will be update to warm lead from pending lead. Or does this section is to update that the lead has converted from pending lead to warm lead and we will have next follow up on this date.

Follow-Up Details

Name

Asad Abbas

Status

Warm Lead

Reminder Date

12/08/2024

Description

We will have further discussion regarding university selection in the follow up

Save

Close

Application Tab

- In Application form section, you can view My Converted Leads Summary – All the converted leads are direct here. Here you get the option to fill application form for the particular lead, which is updated to converted lead

Branch: Islamabad Welcome, testing testing

LEGAL AND GENERAL CONSULTANTS

Dashboard My Leads Application Follow-Ups Status Invoices Reports Meeting & Events Activity Logs

My Converted Leads

Export data to Copy, CSV, Excel, ...

Show 10 entries

Search:

Name	Gender	Phone Number	Status	Form
Muhammad Suleman Shahid	male	033124567890	Converted Lead	

Showing 1 to 1 of 1 entries

Previous 1 Next

- Application Form
 - No drop down options for Language selection
 - We can upload PDF , jpeg files in documents section and fee voucher section
- We can add only one level of education

Education

Degree Title :
Intermediate/ Higher Secondary/ A Levels

Start Date : 15/08/2020 End Date : 15/06/2022

Document :
Choose file User Manual Team Member.pdf

- In Visa Application status update, what could be the visa expiry date when the visa has been rejected. It does not save if we do not fill it.

Visa Application

Name

Muhammad Suleman Shahid

Visa Status

Rejected

Visa Expiry Date

dd/mm/yyyy

Please enter a visa expiry date.

Passport Number

tq1254895

Please enter a passport number.

Destination Country

USA

Please enter a destination country.

Save

Close

- Even if a student application status is pending, which is updated by the Admin (that whether the application is accepted or rejected)

Application Status Summary

Show entries

Search:

Name	Email	Phone Number	University	Course	Application Status	Comments
Muhammad Suleman Shahid	sulemanshahid@gmail.com	033124567890	Harvard University USA	Bachelor of Computer Science	Pending	

- If the team member update deposit payment status as submitted and visa application update as Accepted. The student is directed to Enrolled Student. Even if the admin does not update its status as accepted or rejected.

Deposit Payment

Show entries

Search:

Name	Email	Gender	Phone Number	Status	Deposit	Make Deposit
Muhammad Suleman Shahid	sulemanshahid@gmail.com	male	033124567890	Converted Lead	Submitted	

Visa Application

Show entries

Search:

Name	Email	Gender	Phone Number	University	Course	Visa Status	Visa Application
Muhammad Suleman Shahid	sulemanshahid@gmail.com	male	033124567890	Harvard University USA	Bachelor of Computer Science	Accepted	

Enrolled Students


Export data to Copy, CSV, Excel, PDF & Print

Show entries

Search:

Name	Email	Gender	Phone Number	Cnic	University	Program
Muhammad Suleman Shahid	sulemanshahid@gmail.com	male	033124567890	34125-9741394-8	Harvard University USA	Bachelor of Computer Science

- After filling the form, when clicked on save it gave this error. Try opening url in other browser. Team is working on it

 <https://legalandgen.technologyinn.net/Identity/Account/Login>



This page isn't working



If the problem continues, contact the site owner.

HTTP ERROR 400

- Lead Application form once filled cannot be viewed, edited or deleted

My Converted Leads Summary

Export data to Copy, CSV, Excel, PDF & Print

Show	10	▼	entries	Search:	
Name	Email	Gender	Phone Number	Status	Form
Muhammad Suleman Shahid	sulemanshahid@gmail.com	male	033124567890	Converted Lead	
Sadia Kanwal	sadiakanwal@gmail.com	male	03216548970	Converted Lead	

Invoices Tab

- In print consultation fee voucher. Close or X option is not working. We have to click on print and then cancel it to close the dialogue box. Here print command is working

Print Consultation Fee Invoice

×

Muhammad Suleman Shahid

Email: sulemanshahid@gmail.com

Gender: male

Phone Number: 033124567890

CNIC: 34125-9741394-8

Consultation Fees: 7000

Consultation Dates: 8/1/2024

Close

Print

Report Tab

- Print option is not working. When we click on print for university programs or enrolled students, it opens a new tab with log in option.