



# **V-Trans User Application**

# Login Page

4G 4G 7:36 0.00 KB/s 34



Sales CRM  
Please Log In

User ID

Password

Submit

[Forgot Password](#)



User open this app. And see this kind of login page fill details and login easily.

User write down here Emp Code

User write down here Password.

# Login Page

4G 4G 7:36 0.10 KB/s 34



Sales CRM  
Please Log In

User ID

VTN1080

Password

.....



Submit

[Forgot Password](#)



# Forgot Password

4G 4G 7:36 0.60 KB/s 34



Sales CRM

Forgot password

Employee Code

Email Address

Submit

This page will open when user forgot his/her password.

Here user write down employee Code

Here user would write down his/her Email Address

When user fill these details after that click on this Submit button .

# Attendance

4G 4G 4:44 ... Bluetooth, Camera, Vibration, 2.60 KB/s, 60%

Dashboard

IN

User have to click on this button so easily user get Attendance and access this V-Trans application



START

Attendance

02-04-2021

04:43 PM

IN

User will see on this pop-up with date and time

# Dashboard



Dashboard

OUT



## Lead

| All Lead | Active | Dropped | Unassigned |
|----------|--------|---------|------------|
|----------|--------|---------|------------|

|    |    |   |    |
|----|----|---|----|
| 19 | 19 | 0 | 12 |
|----|----|---|----|

## Approach

| All Approach | Active | Dropped | Unassigned |
|--------------|--------|---------|------------|
|--------------|--------|---------|------------|

|    |    |   |    |
|----|----|---|----|
| 17 | 17 | 0 | 13 |
|----|----|---|----|

## Negotiation

| All Negotiation | Active | Dropped | Unassigned |
|-----------------|--------|---------|------------|
|-----------------|--------|---------|------------|

|   |   |   |   |
|---|---|---|---|
| 7 | 7 | 0 | 4 |
|---|---|---|---|

## Closure

| All Closure | Active | Dropped | Unassigned |
|-------------|--------|---------|------------|
|-------------|--------|---------|------------|

|   |   |   |   |
|---|---|---|---|
| 7 | 7 | 0 | 4 |
|---|---|---|---|

## Order

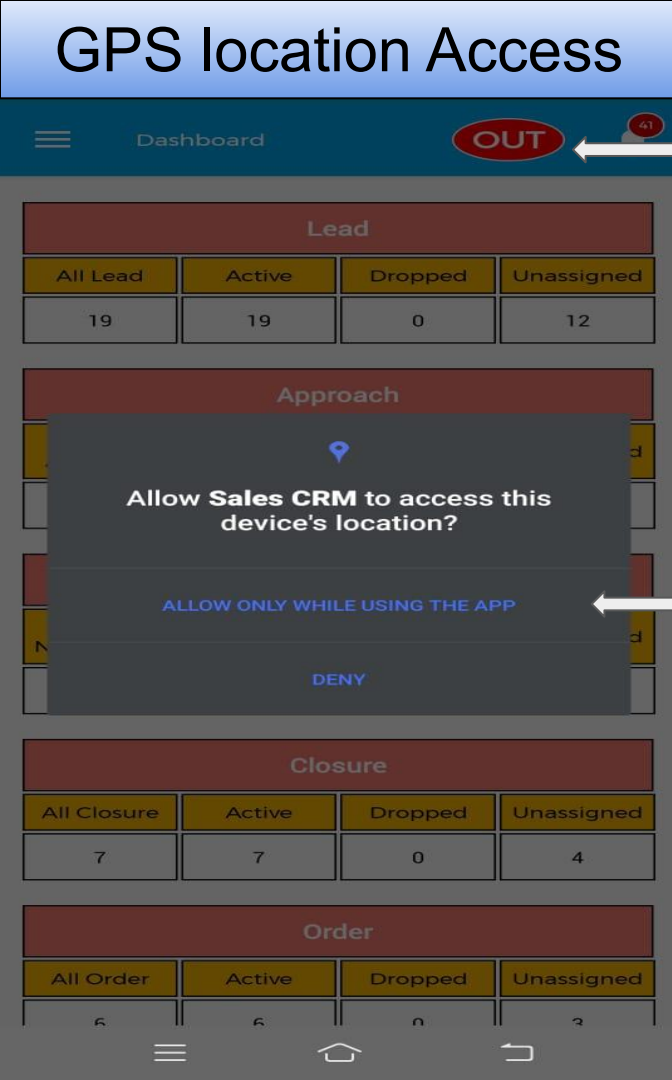
| All Order | Active | Dropped | Unassigned |
|-----------|--------|---------|------------|
|-----------|--------|---------|------------|

|   |   |   |   |
|---|---|---|---|
| 6 | 6 | 0 | 3 |
|---|---|---|---|



User dashboard look like this, Here user will see the all data in different stages on single page.

# GPS location Access














After click on this ,“OUT” this mean user have mark attendance and able to access this app data now.

User have to allow access of device's location

# Lead



Sales CRM  
sanjaygupta@vtransgroup.com

-  Dashboard
-  Lead
-  Approach
-  Negotiation
-  Closure
-  Order
-  Future opportunities
-  Task
-  Deal
-  Visit
-  Contact

From Menu bar user can create lead so firstly click on this button



# Lead



+ Mr. system test  
1428632813  
system@test.com  
Archiz Solutions

+ Mr. bcc xjfxh  
8568655065  
ch cgh

+ Mr. vcccv gvgh  
9098686688  
test@mail.com  
xcggg

+ Mr. testing zggshs  
4567891237  
test@mail.com  
Wipro

+ Mr. Archiz Testing  
8439818344  
ssgautamji9@gmail.com  
Archiz Testing



Sales person can easily do follow-up via email / whatsapp / call / SMS and interested customer will move in approach Stage

User will see this screen, where all existing leads are showing and user can create new lead from here

Click on +(Add)icon to add new leads via application



# Lead



+ Mr. shubham mani  
5354246875  
te@mail.com

+ Mr. Shivam Chauhan  
9809894345  
test@test2.com

+ Mr. dheeraj Test  
9717963903  
dheeraj@arvhizsolutions.com

+ Mr. suraj kumar kumar  
9667899966  
suraj.k112242@gmail.com



Change filter then list will be displayed accordingly

Add New Lead



To create new lead, click on Red button after clicking on blue + icon

# New Lead

5:25

54.5 4G+ 50



Add New Lead



Company

Sales Branch

--Select--

Client Name

Contact

--Select--

First Name

Mr. First Name

Last Name

Designation

--Select--

Gender

--Select--

Mobile



Enquiry form will open , fill all the required details

# New Lead

4G 4G 5:32 0.00 4G 49



Add New Lead



FTL



Industries

Others



Remark

call me

Department

The office pass

Country Code

+91

STD Code

0591

Website

www.hcl.com

Pincode

244001

Save

After fill out all these details, click on save icon



# Lead



+ Mr. kenya test  
9874563210

+ Mr. Ravindra singh  
HCL Noida  
HCL  
9027649030  
test@jackson.com

+ Mr. bcc xjfxh  
ch cgh BHANDUP  
ch cgh  
8568655065

+ Mr. vcccv gvgh  
xcggg BOISAR  
xcggg  
9098686688  
test@mail.com

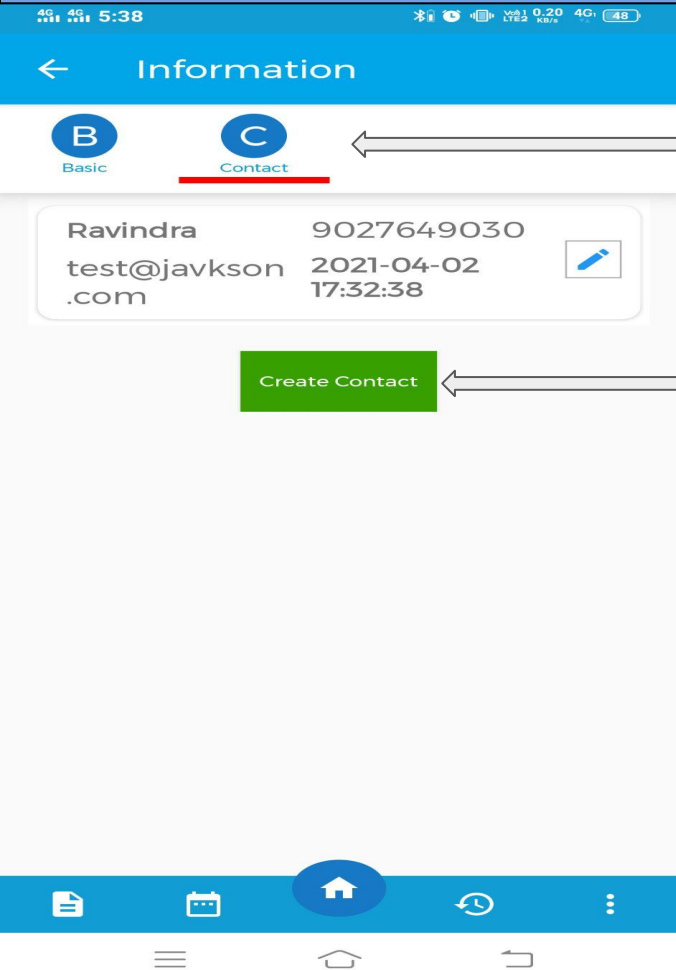
+ Mr. testing zggshs  
Wipro BHANDUP  
Wipro  
4567891237  
test@mail.com

Add New Lead



Here new lead created and user can see new lead in the lead list.

# Contact Page



Contact option is provided which is used to create secondary contact person details

Click on create icon to create secondary contact

# New Contact

4G 5:38

LYB 2.60 4G 48

← Create Contact

Designation

--Select--

Name

Contact Phone

Contact Email

☐ Decision Maker

Other Details

Other Details

Save

This form opens and user fill all fields to create new Contact

After fill out all required fields click on save icon

# New Contact

4G 5:49

LYB 0.00 4G 46

← Create Contact

Designation

Decision Maker

Name

Ravindra Singh

Contact Phone

9027649030

Contact Email

xyz@gmail.com

☒ Decision Maker

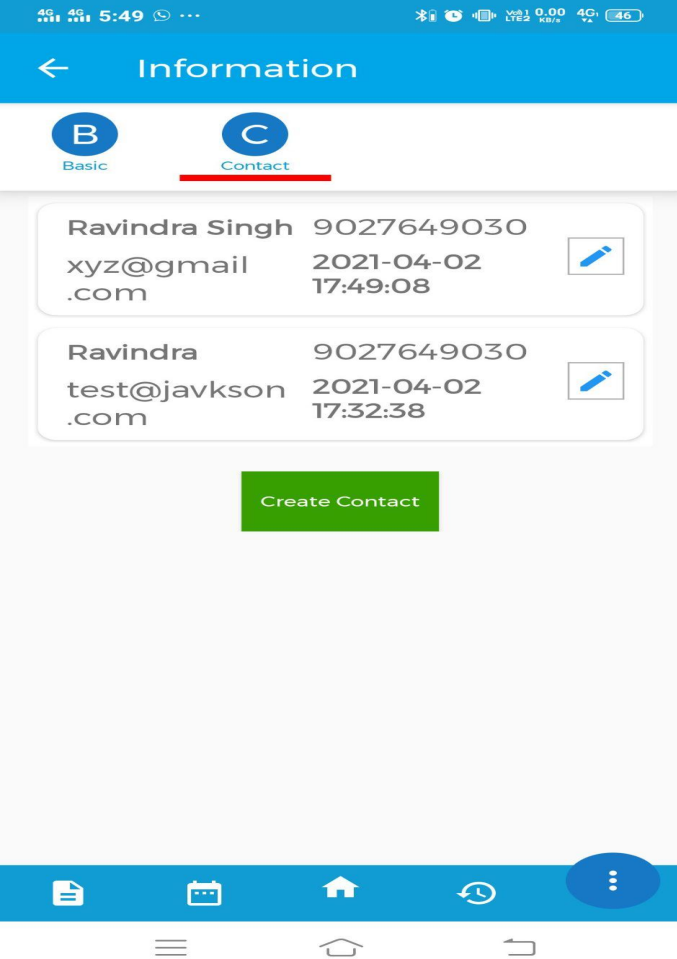
Other Details

call me

Save

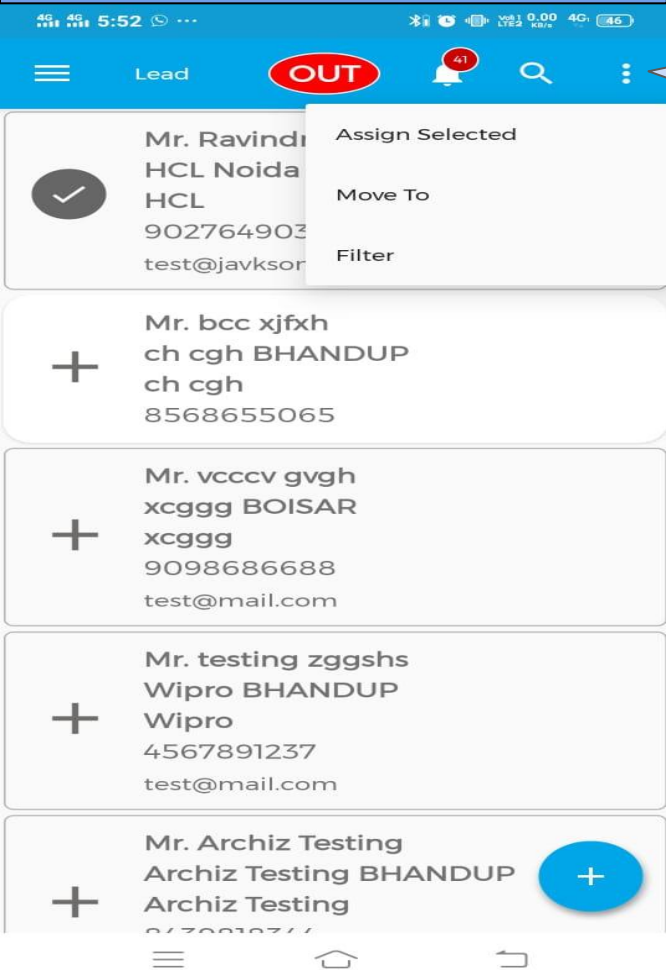


# Contact Page



Now both of the user details are showing in the crm

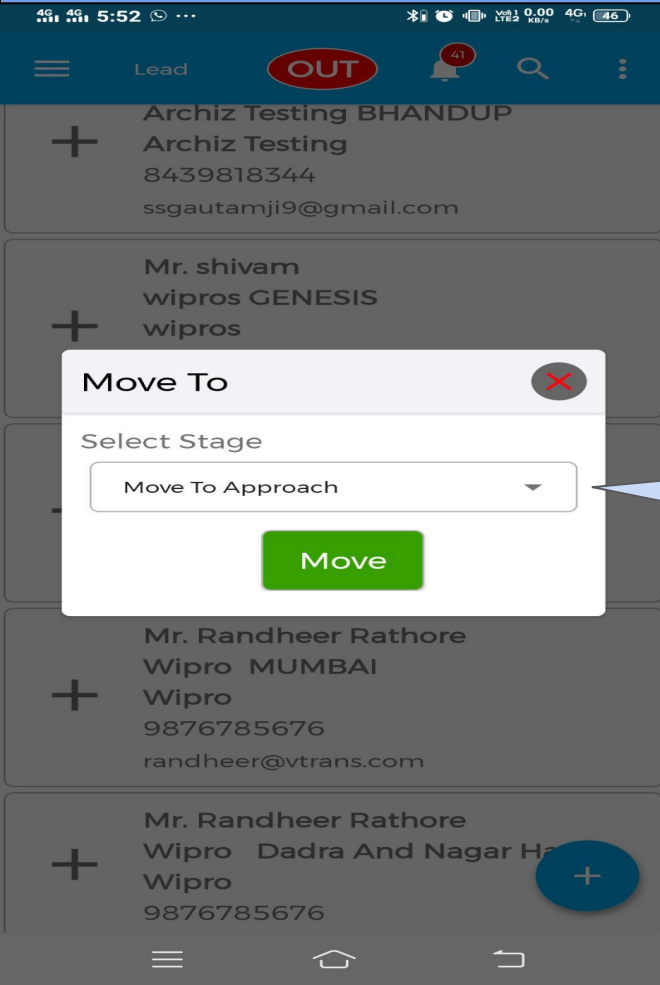
# Lead



Select any lead and click on menu icon to assign the lead to other user, or move to next stage or to filter out the leads



# Lead



Select stage to move  
the lead and click on  
move icon

# Lead

4G LTE VOLTE 26 B/s 10:50 AM

Lead OUT 43

Mr. kenny test  
9874563210

## Move to Approach

Client Name

Ravindra Singh NOIDA

Expected Closure Date

6/4/2021



Add Comment

remind me

Move

Cancel

test@mail.com

Mr. testing zggshs  
Wipro BHANDUP

Fill all the details and  
add comment and  
click on move icon

# Approach



Sales CRM  
sanjaygupta@vtransgroup.com

- Dashboard
- Lead
- Approach
- Negotiation
- Closure
- Order
- Future opportunities
- Task
- Deal

Click on  
this icon

User will see this kind of list  
after click on Approach.  
(Deal will be create by web  
version)

User will see this kind of list  
after click on Approach.

# Approach List

0 B/s 1:03 PM

Appro... **OUT** 47

Mr. Archiz Testing test  
Archiz Testing SAKINAKA  
Archiz Testing  
8439818344  
ssgautamji9@gmail.com

Mr. Sandeep Goyel  
Goyel Enterprise BOISAR  
Goyel Enterprise  
8945324378  
sandeep@goyel.com

Mr. Ranveer Singh  
Wipro GENESIS  
Wipro  
9958780413  
randheer@yopmail.com

Mr. test bsbsbs  
sant testing Bhandup  
sant testing  
7979797887  
santtesting@mail.com



# Negotiation

4G LTE VOLTE 644 B/s 53%



Sales CRM  
sanjaygupta@vtransgroup.com

Dashboard

Lead

Approach

Negotiation

Closure

Order

Future opportunities

Task

Deal

Click on this icon

In Negotiation user can be edit deal by web version. if user need more discount. Edit form web, sent for final approval to the senior, After approval from senior, Sales agent will download & mail to the customer.

# Negotiation List

4G LTE VOLTE 7.71 KB/s 54% 1:37 PM

Menu Negot... OUT 43



Mr. Archiz Testing test  
Archiz Testing SAKINAKA  
Archiz Testing  
8439818344  
ssgautamji9@gmail.com



Mr. Sandeep Goyel  
Goyel Enterprise BOISAR  
Goyel Enterprise  
8945324378  
sandeep@goyel.com



Mr. Ranveer Singh  
Wipro GENESIS  
Wipro  
9958780413  
randheer@yopmail.com



Mr. test bsbsbs  
sant testing Bhandup  
sant testing  
7979797887  
ssgautamji9@gmail.com



If deal is done at Negotiation stage, then only user will able move the particular lead in the closure stage.

# Negotiation Info.

4G LTE VOLTE 1.08 KB/s 1:37 PM

Information

B

Basic

C

Contact

V

Visit

D

Deal

Company

Archiz Testing

Sales Region

MUMBAI

Sales Area

MUMBAI

Sales Branch

SAKINAKA

Client Name

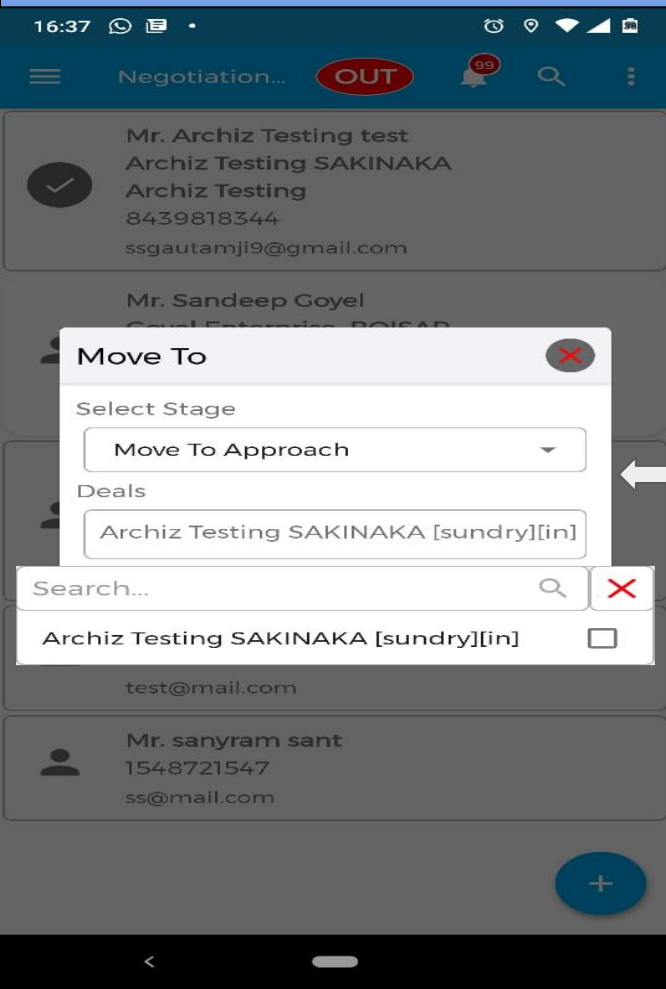
Archiz Testing SAKINAKA

First Name

Mr.

Archiz Testina

# Negotiation



User can move to Approach ,order, closure, Future Opportunities

# Disposition

1:25 ...

← Information

B

Basic

C

Contact

V

Visit

D

Deal

## Disposition

Stage

HOT

Description

HOT Stage- Description will b..

Date

5-4-2021

Time

13:25

Add Comment

abc

Submit

Cancel

Click on disposition icon to update and select the fields and click on submit

# Disposition

4G 5:59 ...

← Information

## Create New Task

Subject

Status

Pending

Task Date

Task Time

Remark Details

Create Task

Close

From an enquiry user can create task for follow-ups Reminders

# History

← Information

B

Basic

C

Contact

V

Visit

D

Deal

Company

Archiz Testing

Sales Region

MUMBAI

Sales Area

MUMBAI

Sales Branch

SAKINAKA

Client Name

Archiz Testing SAKINAKA

First Name

Mr.

Archiz Testing

After clicking on icon user will able to see activities of any lead or any updates done in the lead

Click on this icon to check the activity timeline

# History List

Moved to Negotiation

2-Apr-2021 06:10:55 pm

Sanjay Gupta

Deal Added.

1-Apr-2021 10:31:27 pm

Purushottam Kr.

Visit Added

24-Mar-2021 07:28:58 pm

Purushottam Kr.

Visit Added

24-Mar-2021 07:28:12 pm

Cancel

# Menu Bar

4G+ 100% 199 B/s 3:10 PM



Information

B

Basic

C

Contact

Company

Archiz Solutions

Sales Region

MUMBAI

Sales Area

MUMBAI

Sales Branch

MUMBAI

Client Name

Archiz Solution

First Name

Mr.

SVS



Send Mail



Whatsapp



Message



If user wants to send email, whatsapp, sms to any lead by clicking on the menu icon it will directly send to customer





# Closure



Sales CRM  
sanjaygupta@vtransgroup.com

- Dashboard
- Lead
- Approach
- Negotiation
- Closure
- Order
- Future opportunities
- Task
- Deal

Here sales Agent will upload signed agreement. This action will be done in web version only.

After clicking on icon user see this

Click on this icon

# Closure List

Menu Closure **OUT** 43 Search

- Mr. Tanmay Sharma**  
91Spring NOIDA  
91Spring  
2536459865  
prokanhaiya@gmail.com
- Mr. Shivam Chauhan**  
Group India Indore  
Group India  
5636859635  
test@teysg.com
- Mr. shivamtesting41**  
shivam41 Testing Dadra And Nagar Haveli  
shivam41 Testing  
1221221222  
shivamtesting41@gmail.com
- Mr. Akash Tyagi**  
9811810442
- Mr. Vinay verma**

# Closure

355 B/s 4:24 PM

Closure OUT 47

Mr. Tanmay Sharma  
91Spring NOIDA  
91Spring  
2536459865

Move To

Select Stage

Move To Approach

Move To Negotiation

Move To Order

Move To Future opportunities

1221221222  
shivamtesting41@gmail.com

Mr. Akash Tyagi  
9811810442

Mr. Vinay verma

Here user will see list stages and user can select particular option in which they want to move. After selecting one lead stage, user can be move lead, from negotiation to closer.

# Order



Sales CRM  
sanjaygupta@vtransgroup.com

Dashboard

Lead

Approach

Negotiation

Closure

Order

Future opportunities

Task

Deal

Order stage is the final stage where customer is agreed to utilise services of company on a given agreement

# Order List

Order **OUT**

Mr. Shivam Chauhan  
IGL GOREGOAN  
IGL  
2536589658  
testindia@test.com

Mr. Shubham Shukla  
Makan PALGHAR  
Makan  
8685968569  
shubham@test.com

Mr. Ashish Misra  
Infosys MUMBAI  
Infosys  
7890785678  
ashish@misra.com

Mr. test testing  
7897546785

Mr. Mr.Abhijit Sutar  
8175616103



# Future Opportunities



Sales CRM  
sanjaygupta@vtransgroup.com

- Dashboard
- Lead
- Approach
- Negotiation
- Closure
- Order
- Future opportunities**
- Task
- Deal

In future opportunities stage only those customers data will show who are planning to utilize the service in future from any stage leads can be moved to future opportunities

# Future Opportunities List

| Future... |   | OUT | 43 | Q |  |
|-----------|---|-----|----|---|--|
|           | Mr. Ravindra singh<br>HCL Noida<br>HCL<br>9027640000<br>testravi@jackson.com                        |     |    |   |  |
|           | Mr. system test<br>Archiz Solutions DAHANU<br>Archiz Solutions<br>1428632813<br>system@test.com     |     |    |   |  |
|           | Mr. Shivan Chauhan<br>Test by Archiz DHOLKA<br>Test by Archiz<br>5638995868<br>testarchiz@system.co |     |    |   |  |
|           | Mr. Firoj khan<br>Intel DAHANU<br>Intel<br>2536523653<br>firoz@gmail.com                            |     |    |   |  |

# Task

4G R VOLTE 13 B/s 2:06 PM



43

Sales CRM  
sanjaygupta@vtransgroup.com



Approach



Negotiation



Closure



Order



Future opportunities



Task



Deal



Visit

In task tab list of tasks created by any user shows

# Task List

4G R VOLTE 104 B/s 2:06 PM



Task

OUT

43

Mr. ShivamChauhan

8900767856

5-4-2021 13:56:00

Mr. Ravindrasingh

xyz@gmail.com

1234567890

3-4-2021 22:00:00

Mr. Ravindrasingh

testravi@jackson.com

9027640000

03-04-2021 10:00:00

Mr. ShivamChauhan

testindia@test.com

2536589658

02-04-2021 12:30:38

Mr. RaviSingh

xyz@gmail.com

9027640000

02-04-2021 09:53:22

Create Task

Mr. sanyramsant

ss@mail.com

1548721547

02-04-2021 09:36:22

# Create Task



## Create Task

Subject

idea

Task Type

Follow Up

Task Date

5-4-2021



Task Time

16:2



Status

Pending

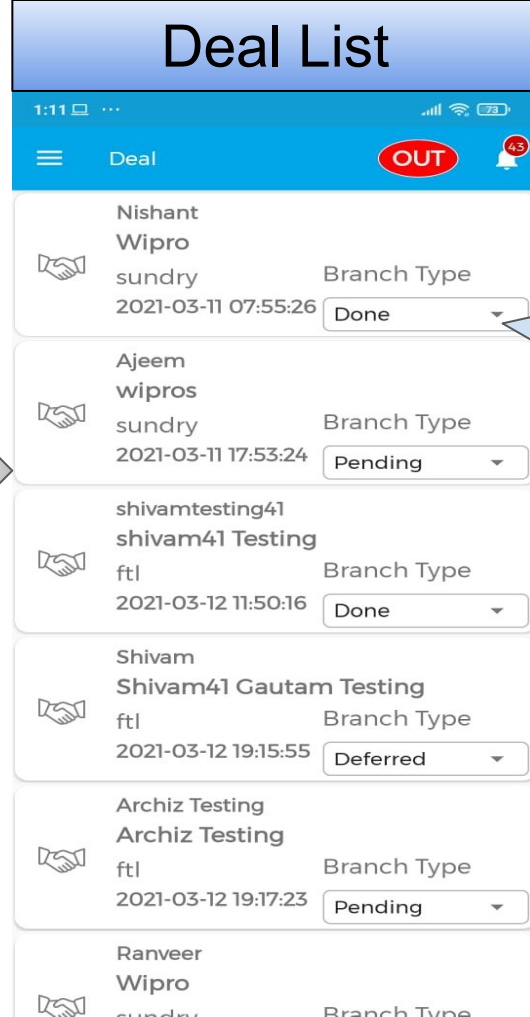
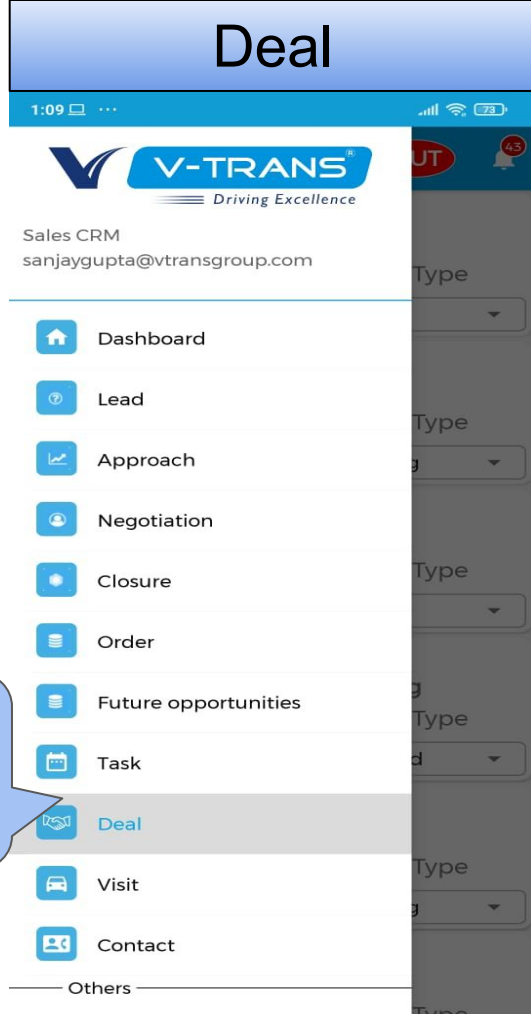
Remark Details

call me

Save

For create new task user have to fill these details

When user fill these details after that click on this Submit button .



In Deal section all deals with their current status will shows , here user can change the status from pending to done or deferred

Click on deal icon to check a deal for any lead

# Deal

1:11 4G LTE 73%

Deal OUT 43

Nishant Wipro sundry 2021-03-11 07:55:26 Branch Type Done

Ajeem wipros sundry 2021-03-11 17:53:24 Branch Type Pending

shivamtesting41 shivam41 Testing ftl 2021-03-12 11:50:16 Branch Type Done

Shivam Shivam41 Gautam Testing ftl 2021-03-12 19:15:55 Branch Type Deferred

Archiz Testing Archiz Testing ftl 2021-03-12 19:17:23 Branch Type Pending

Ranveer Wipro sundry Branch Type

In Deal section all deals with their current status will shows , here user can change the status from pending to done or deferred

- User can select any lead and can check an deal for any customer, also can download or can mail directly to customer

# Deal Quotation

4G LTE VOLTE 7.21 KB/s 59% 5:06 PM

Deal Quotation

DOWNLOAD

EMAIL



Ref No: VT/HO/2019-2021/001

Date: 31-Mar-2021

To: Ms. Nishant Addresssystem

Mobile No. 5625352563 Email ID. test@apcheck.com

Kind Attention: Mr. /Ms. Nishant.

Dear Sir/Madam,

Subject: Quotation for Transportation of your valued materials.

This is in continuation to our discussion regarding your logistic needs; firstly we would like to express our gratitude for the confidence shown in our services by inviting our business proposal.

Pleased find enclosed a write up of our company's profile for your information. (Annexure - 1)

Further on the subjected, we are enclosing our rate annexure for the transportation of your goods along with terms and conditions. (Annexure -2)

We are very confident that we will be able to fulfil all your requirements and will bring more value on the table with value added services such as dedicated customer service team, speedy response, 24 X 7 tracking on desktop as well as mobile, transit insurance and many more delightful features and privileges.

Should you require any clarifications or further information, please feel free to contact us at the below given address. Thanking you and we look forward to the pleasure of your patronage.

For V-Trans (India) Ltd.

Name: Purushottam Designation: ASM Mobile No.: 8860303101 Email ID: purushottam@vtransgroup.com

Encl: As Stated above.

Your Competitive Edge

TRANSPORT. EXPRESS. LOGISTICS

V-Trans (India) Limited (formerly Vijay Transport Co. Ltd.) V-Trans House, Unit No.06, Corporate Park, V. N. Purav Marg, Chembur, Mumbai - 400071, Tel. No. 022-67369999



# Visit

4G+ 0 B/s 46% 3:05 PM



Sales CRM  
sanjaygupta@vtransgroup.com

- Order
- Future opportunities
- Task
- Deal
- Visit**
- Contact

Others

Profile

About Us

Click on Visit icon after that form will open look like this

# Visit List

4G+ 17.93 KB/s 46% 3:05 PM



Visit

OUT



## IGL GOREGOAN

Shivam

Created By: Sanjay Gupta

2021-04-05 12:38:00

Status :Not Started

## Wipro Dadra And Nagar Haveli

Shivam

Created By: Purushottam Kr.

2021-04-05 12:00:00

Status :Not Started

## HCL GOREGOAN

Ravindra Singh

Created By: Purushottam Kr.

2021-04-02 08:51:00

Status :Not Started Expen Rs.:50.0

## Wipro Dadra And Nagar Haveli



# Create Current Visit

4G R, R, VOLTE 2.67 KB/s 3:08 PM

← Create Visit



☒ Current Visit ☐ Future Visit

Comapny Test

Wipro



Client Name

Wipro Dadra And Nagar Haveli



Contact

Shivam



Visit Date

05-04-2021



Visit Time

03:08 PM



Purpose of meeting \*

get idea

Save

# Create Future Visit

4G R, R, VOLTE 151 B/s 3:09 PM

← Create Visit



☐ Current Visit ☒ Future Visit

Comapny Test

Wipro



Client Name

Wipro Dadra And Nagar Haveli



Contact

Shivam



Visit Date

7-4-2021



Visit Time

03:09 PM



Purpose of meeting \*

get idea

Save

Create new visit firstly user have to fill details in current Visit and after that fill details in Future Visit

After fill all details user click on Save icon

# Visit List

0 B/s 3:05 PM



Visit

Approve / Reject

Filter

Process

IGL GOREGOAN

Shivam

Created By: Sai

2021-04-05 12:38:00

Status :Not Started

Wipro Dadra And Nagar Haveli

Shivam

Created By: Purushottam Kr.

2021-04-05 12:00:00

Status :Not Started

HCL GOREGOAN

Ravindra Singh

Created By: Purushottam Kr.

2021-04-02 08:51:00

Status :Not Started  
Expencc Rs.:50.0

Wipro Dadra And Nagar Haveli



Reporting Manager have option to Approve or reject visit expenses for the particular employee.

# Visit List

193 B/s 3:06 PM



Visit

OUT



IGL GOREGOAN

Shivam

Created By: Sanjay Gupta

Expense Approval



Status

Approve

Add Comment

discussion

Submit

2021-04-02 08:51:00

Status :Not Started  
Expencc Rs.:50.0

Wipro Dadra And Nagar Haveli



## Visit Details



### Visit Details

Shivam  
IGL  
Noida

Visit Date : 2021-04-05

Visit Time : 12:38:00

Start Address :

Stop Address :

Purpose of Meeting : meeting

START TRAVEL

START MEETING

VISIT END

REVIEW

- Firstly to start any visit, user need to click on start travel to start journey
- When reached the destination click on stop visit and start the meeting with a person
- After meeting done then click on meeting end and can continue to start travel if retravel
- After reaching the destination, person can click on visit end and can review the whole visit
- After all the activities map location of all day activities will shared with the senior automatically

## Visit Details



### Visit Details

Shivam  
IGL  
Noida

Visit Date : 2021-04-05

Visit Time : 12:38:00

Start Address :

Stop Address :

Purpose of Meeting : meeting

STOP TRAVEL

START MEETING

VISIT END

REVIEW

# Contact



Sales CRM  
sanjaygupta@vtransgroup.com

Order

Future opportunities

Task

Deal

Visit

Contact

Others

Profile

About Us

Contact in Menu bar is used to save the information of enquiries like their email and call numbers

# Contact List



Contact

OUT



system  
1428632813  
system@test.com  
2021-04-05 12:46:30



Ravi  
9837510654  
xyz@gmail.com  
2021-04-05 11:40:40



Ravindra  
9027649030  
ravindrasinghnewmorada  
bad@gmail.com  
2021-04-05 10:48:55



Surya Prakash Mishra  
9454324546  
suryaprakash.iabm@gmail  
.com  
2021-04-05 08:40:04



Sunanda  
9969015861



# Notification Page

|                 |        |         |            |
|-----------------|--------|---------|------------|
| 5:25            |        |         |            |
| Dashboard       |        |         |            |
| OUT             |        |         |            |
| 41              |        |         |            |
| Lead            |        |         |            |
| All Lead        | Active | Dropped | Unassigned |
| 19              | 19     | 0       | 12         |
| Approach        |        |         |            |
| All Approach    | Active | Dropped | Unassigned |
| 17              | 17     | 0       | 13         |
| Negotiation     |        |         |            |
| All Negotiation | Active | Dropped | Unassigned |
| 7               | 7      | 0       | 4          |
| Closure         |        |         |            |
| All Closure     | Active | Dropped | Unassigned |
| 7               | 7      | 0       | 4          |
| Order           |        |         |            |
| All Order       | Active | Dropped | Unassigned |
| 6               | 6      | 0       | 3          |

By clicking on this notification icon, user will see the daily reminder notification.

# Notification List

|  |      |        |        |
|--|------|--------|--------|
| 4:11 PM                                  |      |        |        |
| Notifications                            |      |        |        |
| ALL                                      | READ | UNREAD | TODAY  |
| idea                                     |      |        |        |
| Mr. Shivam Chauhan - Wipro               |      |        | Unread |
| Wipro Dadra And Nagar Haveli             |      |        |        |
| call me                                  |      |        |        |
| 5-4-2021 16:02:00                        |      |        |        |
| HOT :Mr. Akash Tyagi tyagi               |      |        |        |
| Mr. Akash Tyagi tyagi - Archiz Solutions |      |        | Unread |
| Archiz Solutions DAHANU                  |      |        |        |
| Venus                                    |      |        |        |
| 05-04-2021 15:53:00                      |      |        |        |
| discussion                               |      |        |        |
| Mr. Shivam Chauhan - Wipro               |      |        | Unread |
| Wipro Dadra And Nagar Haveli             |      |        |        |
| hlw                                      |      |        |        |
| 5-4-2021 13:56:00                        |      |        |        |
| Digital                                  |      |        |        |