* Sales Automation
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| Sales Force Automation | Track leads, prospects and close more deals in less time. Keep customer data organized for up-selling & cross-selling opportunities. | Marketing Automation | Effectively plan marketing activities, send mass emails and improve the quality of lead generation processes using web forms. |
| Inventory Management | Track the procurement and sale of goods or services and manage the pre-sales and post-sales activities in a single application. | Customer Support | Enable a better integration between Sales & Customer Support processes in a single system. |
| Reports & Dashboards | Generate various reports and use dashboards to visualize comparisons, patterns, and trends in sales, and marketing. | Activities | Organize and keep track of all the tasks, events, and calls. Also, set reminders and create recurring activities. |
| Document Library | Manage and easily share all your business related documents in the Documents tab within CRM. | CRM for Mobile | Get instant access to your CRM data anywhere, anytime, from your iPhone, iPad and Android phones. |
| Personal Settings | Define your personal settings such as language, date & time, signature, name format, currency, etc., as per your requirements. | Organization Settings | Add your company details, including set up fiscal year, business hours and personalize your company logo. |
| Users & Permissions | Define the security levels in your account by creating the roles, profiles, and groups for the users. | Customization | Apply page-level and field-level customizations, change tab settings and other company related details in your account. |
| Automation | Automate sales, marketing and support processes by creating workflow rules, alerts & tasks plus record assignment rules. | Templates | Create email templates, inventory templates and mail merge templates of your own. |
| Website Integration | Publish web forms online and set up auto response rules to send emails for the records generated via web forms. | Data Administration | Import your data into CRM, keep track of the import details and also export your data anytime. |
| Apps & Add-ons | Select from a wide range of add-ons and plug-ins that help you manage your business effectively. | Billing & Payments | Manage all your subscription and billing details; upgrade or downgrade your account anytime. |

Leads

Leads are raw details about individuals or representatives of organizations collected from trade shows, seminars, advertisements and other marketing campaigns.

Create Leads | Associate Leads | Convert Leads | Approve Leads | Lead Assignment Rules | Standard Fields

Accounts

Accounts are companies or departments with which you plan or have business dealings.

Create Accounts | Associate Accounts | Member Accounts | Standard Fields

Contacts

Contacts are people in an organization with whom you communicate in pursuit of a business opportunity.

Create Contacts | Associate Contacts | Approve Contacts | Contact Assignment Rules | Standard Fields

Opportunities

Potentials are business deals with companies or people that generate real revenue for your organization.

Create Potentials | Associate Potentials | Big Deal Alert | Standard Fields

Forecasting

Forecasts are factual insight for fine-tuning the sales process in your organization.

Forecasts Based on Role Hierarchy | Forecasts Based on Territory Hierarchy | Set Fiscal Year

Feeds

Collaborate with your team members, follow the records that are most important to you and keep track of the activities associated to them.

Create Groups | Add Auto-Follow Rules | Transition Guide

Document Library

Manage all your business related documents in a single place within ONLINE LEAD MANAGMENT for easy access and save storage space.

Modify Profile Permissions | Manage Documents Folder | Upload Documents

Macros

Save time by combining sets of actions that can be executed for a group of records in a module.

Learn More

Activities

Create and associate tasks, events and calls to with information on the date, time, priority level and notification parameters etc.

Tasks | Events | Calls | Calendar

Marketing Automation

As part of the marketing automation, ONLINE LEAD MANAGMENT provides Campaign management, Email marketing, and Web Forms (to generate leads, contacts, and cases) which are useful for integrating your organization's sales and marketing activities.

With the ONLINE LEAD MANAGMENT campaign management features, you can effectively plan marketing expenditures and improve the quality of lead generation process. In addition, campaign management integrated with leads and opportunities modules helps your organization in measuring the campaign performance and effectiveness.

Campaigns

Plan, execute and monitor the performance of your marketing activities.

Create Campaigns | Associate Campaigns | Add Campaigns to Leads/Contacts | Standard Fields

Web Forms

Build web forms to capture leads, contacts and cases online.

Set up Web Forms | Auto Response Rules | Un-subscription Form

ONLINE LEAD MANAGMENT for Google AdWords

Close the loop between online ad dollars and offline conversions.

Configure | Set up Web Form for Tracking | Track Data | Push Data to Google AdWords

Mass Email

Send mass emails to your leads and contacts use autoresponders to follow up with customers.

Send Mass Emails | Schedule Mass Emails | Autoresponders | Autoresponder Scenario

Email Marketing with Campaigns

Export leads and contacts from ONLINE LEAD MANAGMENT to Campaigns and easily plan & execute email campaigns.

Learn More

Document Library

Manage all your business related documents in a single place within ONLINE LEAD MANAGMENT for easy access and save storage space.

Modify Profile Permissions | Manage Documents Folder | Upload Documents

Account Settings

The ONLINE LEAD MANAGMENT account settings consists of Personal and Organizational Settings. Before you start working with your account, you need to set up the personal settings such as defining a country locale, language, time zone, date format, etc. Users in an organization work from different locations, across different time zones and geography. They can set up their personal preferences in ONLINE LEAD MANAGMENT. If you have set up an organization's account, you can setup fiscal year, business hours etc. for your organization.

Personal Settings

Personalize your ONLINE LEAD MANAGMENT account by setting up your country locale, time zone, language and personal details.

Change Language | Use Signature | Update Personal Information | Themes

Organization Settings

Specify company details, your organization's business hours, fiscal year and currencies.

Change Company Details | Personalize Logo | Set Currency | Set up Fiscal Year | Copy Customization | Multiple Currencies

Account Settings

Change password, security questions, and set preferences for your account.

Change Password | Reset Password | Change Preferences | Check User Sessions

Security Management

Managing the complexities of security administration is one of the growing concerns in any enterprise, especially those open to e-commerce and those with large networks. In such demanding times, the availability of Security Management is considered predominant – affecting all sectors of an enterprise.

The foundation of any security management is a model with role-based access control, enabling all the required functionality and authentication for a security system.

ONLINE LEAD MANAGMENT provides a set of security features that defines permission to the data as well as the features of ONLINE LEAD MANAGMENT. Administrators control these security options in the organization's account.

The role-based security ensures that data is accessible to users based on the organization's hierarchy. Profiles, on the other hand, ensure that users have permission to only the relevant features in ONLINE LEAD MANAGMENT - various modules, data administration tools. There is also Groups that allow you to extend the data-level access to other users with similar job profile.

Manage Users

Manage all the users in your ONLINE LEAD MANAGMENT account, deactivate users who are no longer part of the company account.

Add Users | Re-Invite Users | Activate/Deactivate Users | Delete Users | Allowed IPs

Manage Profiles

Create profiles that define the access permissions for the users. Set module-level and feature-level permissions for different profiles.

Create Profiles | Control Permissions | Associate Users

Manage Roles

Create roles for the users in your account such as CEO, Sales Manager, Marketing Manager etc.

Create Roles | Assign Roles

Territory Management

Segment customer accounts based on account characterizes such as, products or services, expected revenue, zip code/region, or industry, rather than record ownership.

Create Territories | Assign Territories | Decision Guide

Fields & Links Permission

Control the access rights of ONLINE LEAD MANAGMENT fields and link for various profiles.

Fields | Links

Manage Groups

Create groups to manage a common set of records with a group of members.

Share Records | Assign Groups

Data Sharing Rules

Define rules that help you to share data with peers, management, and subordinates.

Manage Data Sharing | Creating Data Sharing Rules

Mail Add-on Users

Manage the users' access for the Mail Add-on feature.

Lock/Unlock Email Account | Take Backup of Email Account

Customization

Customizing is the most powerful way of achieving a successful organization-specific Customer Relationship Management system. One of the key elements of ONLINE LEAD MANAGMENT is its capacity to allow customization and the flexibility to do so. Based on the organization's requirements, users with Administrative privileges can implement ONLINE LEAD MANAGMENT customization.

You can customize a lot of elements like the tabs (modules), the page layouts, sections in a page, fields, etc. The changes include renaming, reordering items and even hiding tabs and fields that are not required.

Home Tab Customization

Personalize your Home tab by adding components and rearranging them.

Add Components | Change to Customizable Mode

Module Customization

Customize standard modules and create new modules by adding/removing fields, designing the layout and editing permissions.

Create a New Module | Edit/Delete a Module | Preview Module | Add New Fields |Standard Fields | Custom Fields | Formula Fields | Special Fields | Design Module Layout | Set Module Permissions | Organize Modules

Tab Settings

Customize the tabs by renaming them, hide unwanted tabs and create web tabs of your own.

Manage Web Tabs | Group Tabs

Data Administration

The purpose of the ONLINE LEAD MANAGMENT data administration tools are to guide the ONLINE LEAD MANAGMENT Administrator in creating, verifying and ensuring data integrity by maintaining relationships and implementing access controls throughout the databases.

Based on the organization's requirement, user(s) with Administrator privilege can set up the ONLINE LEAD MANAGMENT data administration. The specific operational procedures within ONLINE LEAD MANAGMENT's data administration are explained below.

Reports & Dashboards

Create reports and pictorial representation of your custom report data, for a real-time snapshot of your organization's key metrics.

Reports| Dashboards

Import Data

Import data in your ONLINE LEAD MANAGMENT account and automatically assign it to the respective users.

Import Limits | Import My Data | View Import History

Export Data

Export the data from your ONLINE LEAD MANAGMENT account.

Export Data | Request Data Backup

Migrate to ONLINE LEAD MANAGMENT

Migrate to a ONLINE LEAD MANAGMENT account easily. Also, you can request to perform a migration for you.

Migrate Data from Other ONLINE LEAD MANAGMENT | Request Migration

Miscellaneous

Monitor your file storage space and calculate the space available in your account.

View Storage | Recycle Bin

Automation

In business, there are numerous everyday activities and processes that need to be done and when automated will save time and effort. For example, a sales manager may be required to assign the leads to various sales reps based on certain criteria. Also, you may need to send pre-sales and post sales follow up emails to customers at scheduled intervals.

ONLINE LEAD MANAGMENT gives you the option to automate workflow procedures and set up automatic replies, alerts, and notifications in advance. You can create workflow rules and associate workflow alerts, tasks and field updates with them. Additionally, you can set up case escalation rules and also assignment rules for leads, contacts and cases generated via web forms.

Workflow Management

Automate your sales, marketing and business processes and standardize working methods.

Workflow Rules | Workflow Alerts | Workflow Tasks | Workflow Field Updates | Scenario | Web hooks | Custom Functions

Assignment Rules

Set up assignment rules for records that are generated via web forms and also set up escalation rules.

Set up Assignment Rules | Set up Cases Escalation Rules

Website Integration

ONLINE LEAD MANAGMENT Mobile Edition

ONLINE LEAD MANAGMENT Mobile Edition gives you the option to access and work with your Online LEAD MANAGMENT data from your mobile devices. The ONLINE LEAD MANAGMENT native app is available for the iPhone, iPad and Android phones. Additionally, you will be able to use the web app in other mobile devices. You can access data from ONLINE LEAD MANAGMENT modules such as Leads, Accounts, Contacts, Potentials, Cases, Tasks, Events, etc. wherever you go. Also, you can work in the offline mode to add, modify, or delete records which will be saved locally and synchronized with your Online Account, when you connect to the network.

ONLINE LEAD MANAGMENT for iPad

Access your ONLINE LEAD MANAGMENT data from your iPad.

Install Native App for iPad | Features | Usage

ONLINE LEAD MANAGMENT App for iPhone

Access your ONLINE LEAD MANAGMENT data from your iPhone.

Install Native App for iPhone | Features | Usage

ONLINE LEAD MANAGMENT App for Android

Access your ONLINE LEAD MANAGMENT data from your Android phone.

Install ONLINE LEAD MANAGMENT for Android Phones | Features | Usage

ONLINE LEAD MANAGMENT Web App for Mobile

Access your ONLINE LEAD MANAGMENT account in the browser of your Mobile devices.

Create Records | Convert Leads | Update Related Lists | Log Calls | Send Emails | Search Records

Inventory Management

ONLINE LEAD MANAGMENT extends beyond the traditional ONLINE LEAD MANAGMENT functions and supports complete sales cycle management by integrating Inventory Management features. These include Products, Price Books, Vendors, Sales Orders, Quotes, and Invoices, along with the Sales related modules, such as Leads, Accounts & Contacts, and Opportunities.

With the ONLINE LEAD MANAGMENT Inventory Management features you can achieve seamless integration between pre-sales and post-sales accounting activities in a single application. In addition, you can also procure goods or services from the selected list of vendor.

Products

Products refer to the goods or services sold or procured by any organization.

Create Products | Associate Products | Customize Tax Rates | Generate PO | Standard Fields

Price Books

Price Books refer to the agreed price for selling a product to a customer. Based on the agreed terms, the prices can even vary for different customers.

Create Price Books | Associate Price Books | Set Discount | Standard Fields

Vendors

Vendors are the companies, individuals or contractors from whom your organization procures products and/or services.

Create Vendors | Associate Vendors | Standard Fields

Quotes

Quotes are legal agreements between a customer and a vendor to deliver the requested product within the specified time at the agreed upon price.

Create Quotes | Associate Quotes | Convert Quotes | Standard Fields

Sales Orders

Sales Orders are confirmation of sales, generated after the customer sends a purchase order based on your quotes.

Create Sales Orders | Associate Sales Orders | Standard Fields

Purchase Orders

Purchase Orders are a legally bound order-placement document for procuring products or services from vendors.

Create Purchase Orders | Associate Purchase Orders | Standard Fields

Invoices

Invoices are bills issued by the vendor to the customers along with the goods or services with the purpose of receiving payment.

Create Invoices | Associate Invoices | Standard Fields

Use web forms, auto response rules and unsubscribe forms to gather data online and build a multi-channel communication to improve business.

Web Forms | Auto Response Rules | Unsubscribe Form

Customer Support

ONLINE LEAD MANAGMENT provides the Customer Support & Service management (Help Desk) features, such as Cases (Trouble tickets), Solutions (Knowledge base), Case Routing & Escalation through Workflow rules, and easy to deploy Web-to-Case forms for capturing customer-specific cases through Websites. In addition, you can also synchronize customer-specific email messages as Cases from Microsoft Outlook mail client to the Cases module in ONLINE LEAD MANAGMENT.

The Cases and Solutions functionality can be used to streamline organization-wide Customer Support processes by integrating Sales & Customer Support in a single system. Integration between Sales and Post-sales support management helps organizations in resolving the customer reported cases in the least possible time, enhancing customer satisfaction and allowing for more cross-selling and up-selling opportunities in future.

Cases

Cases refer to the feedback received from the customers on various issues pertaining to the use of products or services.

Create Cases | Associate Cases | Approve Cases | Case Assignment Rules | Case Escalation Rules | Standard Fields

Solutions

Solutions refer to the resources within the organization that enables solving repetitive problems encountered by customers.

Create Solutions | Associate Solutions | Standard Fields

Manage Subscriptions

New Pricing

Upgrade an Edition | Downgrade an Edition | Update Credit Card Details | View Subscription History

Older Pricing | Oldest Pricing

Miscellaneous

Managing Notes & Attachments

Manage notes under records and attach docs from Desktop, Docs or Google Docs.

Organize Notes | Attach from Docs | Attach from Desktop | Attach from Google Docs

Common Operations

Get to know about some of the common operations such as the mass update, mass transfer, create & export records, change owner, etc. Learn More

Navigate & Search Records

Check out the various ways to search records and navigate through your ONLINE LEAD MANAGMENT data.

Navigate Records | Search Records

Approve Records

Approve leads, contacts and cases captured through your Website.

Approve Leads | Approve Contacts | Approve Cases

Auto responders

Streamline the process of sending series of personalized email messages at predefined intervals to leads and contacts.

Overview | Set up Auto responders | Auto responder Scenario

Merge Duplicate Records

Avoid duplicate entries of records in your account by merging them.

Find and Merge | DE duplicate Records

Associate Records

Associate various records to the parent record. Learn More

Printing Mailing Labels

Get your customer data formatted for mailing labels. Learn More