

***IN HOME PAGE/DASH BOARD,**

IT MUST INCLUDES THE DETAILS GIVEN BELOW IN THE **SALES MANS** WINDOW.

LEAD AND CUSTOMER CAN BE IN ONE TABLE WITH TWO DIFFERENT COLOURS.

WELCOME (SALES MAN'S NAME) HAVE A NICE DAY			DATE:01-OCT-2023								
TOTAL LEADS			TOTAL CUSTOMERS			TOTAL SALES IN THIS MONTH			TOTAL COLLECTION IN THIS MONTH		
123			123			123			123		
TODAY'S FOLLOWUPS						MISSED FOLLOWUPS					
LEAD			CUSTOMER			LEAD			CUSTOMER		
NAME	SOURCE	ACTICITY	NAME	SOURCE	ACTICITY	NAME	SOURCE	ACTICITY	NAME	SOURCE	ACTICITY

FOR **TELECALLER** WINDOW IT SHOWS NO: OF LEADS, NO: OF UNFILLED LEADS, NO: OF UNASSIGNED LEADS, TOTAL NO: OF LEADS IN THIS MONTH, TODAY'S FOLOWUPS (LEAD ONLY), TOTAL MISSED FOLLOWUP'S (LEAD ONLY).

FOR **ADMIN** WINDOW IT MUST SHOWS NO: OF TOTAL CUSTOMERS, NO: OF UNASSIGNED LEADS, TOTAL NO: OF LEADS IN THIS MONTH, TOTAL SALES IN THIS MONTH, TOTAL COLLECTION IN THIS MONTH {TODAY'S FOLOWUPS (LEAD AND CUSTOMER), TOTAL MISSED FOLLOWUP'S (LEAD AND CUSTOMER) WITH DENOTING SALESMAN NAME)}

***IN USERS,**

USER ROLES OR PERMISSION TO VIEW EACH HEAD CAN BE ASSIGN BY ADMIN

TELE CALLER CAN NOT NEED TO SEE PAYMENT COLLECTION AND SALE BILL AMOUNT IN THE SALES MANS WINDOW, TELE CALLER CANOT ALLOW ANY EDITING ON PHONE NUMBER AND NAME AFTER 2 DAYS.

A MANAGER CAN ONLY SEE EVERY SALES MANS ACTIVITIES AND TELECALLERS ACTIVITIES AS AN ADMIN WINDOW, NOT ALLOW TO EDIT ANY DATA, USER CAN BE ADDED BY MANAGER.MANAGER CAN CREATE NEW DROPDOWN SENTENCE.MANAGER CAN BE ADD SELF LEADS OR CUSTOMERS.AND ASSIGN IT TO A TEELCALLER OR SALES MAN (IF NEEDED).

A SALES MAN CAN SEE HIS LEADS AND CUSTOMERS, AND AS IN TELECALLER HE CANOT EDIT CONTACT NUMBERS AND NAME AFTER 2 DAYS, IF ANY FOLLOWUP MISSED TO CLEAR MISSED FOLLOWUP HE MUST WRITE A REASON IN MISSED FOLLOWUP PAGE

***IN LEADS,**

IN LEADS **LEAD FORM** CAN BE AVOIDED (AS UR CHOICE)

(UN FILLED/DATA NEED TO COLLECT / UNATTEMPTED LEAD): THIS TABLE IS ONLY FOR TELE CALLER WHO DEALS WITH LEAD AS SOME CONTACT NUMBER ONLY (OR NAME AND CONTACT NUMBER) IN SOME CASES, AND AS A TRADING COMPANY WE DON'T LIKE TO LOSE THIS.

SL NO:	RECEIVED DATE	SOURCE	CUSTOMER NAME	MOBILE NO.	LOCATION	CATEGORY	REMARKS	ATTENDED AND CHANGE TO LEAD FOLLOWUP

IN LEAD MANAGEMENT

SL NO.	LEAD RECEIVED DATE	NAME	PLACE	MOB NO	CATEGORY	STATUS	SOURCE OF LEADS	NEED	PREVIOUS ACTIVITY	PREVIOUS FOLLOWUP DATE	PRIORITY	NEXT ACTIVITY	NEXT FOLLOWUP DATE	REMARKS
1	01-10-2023	ANU	EKM		Architects	Customer	Partners reference-anoop	pvc	Samples		Very High	Samples		
2	01-10-2023	SEETHA	TSR		Engineers	Hot	Partners reference-riyas	hinges	price list		High	price list		
3	02-10-2023	RAJ	ALUVA		Self interior	Warm	Partners reference - shafeer	ply	call		Medium	call		
4	03-10-2023	RAM	IRINGALAKKUDA		Carpenders	Dropped	Leads from Staff-praveesh	commercial ply	Meeting at their office		Low	Meeting at their office		

FROM THIS TABLE WHEN WE CLICK ON NAME OF CUSTOMER, WE CAN SEE THE PREVIOUS FOLLOWUPS AND ACTIVITIES

WE WANT FILTER IN HEADINGS AND BLUE ROWS WANT DROPDOWNS.

AND ACCORDING TO NEXT FOLLOWUP DATE, NEXT ACTION, NAME, CATEGORY- TODAYS ACTIVITY WANT TO SHOW IN HOME PAGE

IT IS BETTER TO SHOW IN DIFFERENT COLOURS ACCORDING TO PRIORITY .

MISSED FOLLOWUPS WANT TO ADD

SL NO.	MISSED FOLLOWUP DATE	NAME	PLACE	MOB NO	CATEGORY	STATUS	SOURCE OF LEADS	PRIORITY	MISSED ACTIVITY	REASON FOR MISSED	NEXT ACTIVITY	NEXT FOLLOWUP DATE	REMARKS
1	#####	ANU	EKM		Architects	Customer	Partners reference- anoop	Very High					
2	#####	SEETHA	TSR		Engineers	Hot	Partners reference- riyas	High					
3	#####	RAJ	ALUVA		Self interior	Warm	Partners reference -shafeer	Medium					
4	#####	RAM	IRINGALAKKUDA		Carpenders	Dropped	Leads from Staff- praveesh	Low					

IN THE NEXT ACTION -DAY SALESMAN DIDN'T UPADATED THE NEXT ACTICITY, THE DATA OF LEAD IS SHOW IN MISSED FOLLOWUP PAGE.SALES MAN CAN ADD NEXT FOLLOW UP THERE, AND THAT DATA IN LEAD MANAGEMENT IS UPDATED WHEN UPDATING MISSED FOLLOWUP, GIVE A NOTIFICATION FOR MISSED FOLLOWUPS WHICH DID NOT UPDATED.

MISSED FOLLOWUPS OF LEADS ARE SHOWN PERMANANTLY (NOT ERASE AS IN SALESMANS WINDOW WHEN UPDATED)IN **ADMIN** AND **MANAGER WINDOW** BY SHOWING A COLUMN WITH REASON FOR MISSED, DATE OF MISSED, UPDATED ON, SALESMAN NAME, AND GIVE A NOTIFICATION FOR MISSED FOLLOWUPS WHICH DID NOT UPDATED.AND SHOW IT WITH ALIGHT RED COLOUR IN ADMIN WINDOW.

AND A LEAD WHICH NOT MAKE ANY ACTION FOR 20 DAYS MUST SHOW AS A MISSED FOLLOWUP IN SALES MANS WINDOW AS MISSED FOLLOW UP OR AS A NEW TABLE **NAMED INACTIVE LEADS**(OR OTHER NAME)

The drop downs used in **LEAD** are,

It can be added or edited by manager or admin.

LEAD-DROPDOWNS					
CATEGORY	STATUS	SOURCE	LAST ACTIVITY	PRIORITY	NEXT ACTIVITY
Architects	Customer	Partners reference-anoop	Samples sended	Very High	Samples
Engineers	Hot	Partners reference-riyas	Price list sended	High	price list
Interior-small scale	Warm	Partners reference - shafeer	direct meeting	Medium	call
Carpenters	Dropped	Leads from Staff- praveesh	WhatsApp broadcast	Low	Direct meeting
shop	Not Attended	Leads from staff- shihab	called		Company details
Builders		Marketing staff	Company details sended		invite to our go down/office
Interior-with factory		Social media promotions	Ply details		reminding call
House		FB	Reminding call		Reminding message
		Others	Reminding message		
		FTC DATA			
		Leads from staff sruthy			

*IN CUSTOMER

CUSTOMER FOLLOWUP

SL NO.	FIRST BILL DATE	CUSTOMER NAME	PLACE	MOB NO	WHATSAPP NUMBER	CATEGORY	SOURCE OF CUSTOMER	PREVIOUS BALANCE	PREVIOIS BILL AMOUNT	PREVIOUS COLLECTED AMOUNT	PREVIOUS BALANCE IF ANY	NEW BILL AMOUNT	COMMISSION OR DISCOUNT IF ANY	COLLECTED AMOUNT	BALANCE IF ANY	TOTAL BALANCE	PREVIOIS ACTIVITY	PREVIOUS FOLLOWUP DATE	NEXT ACTIVITY	NEXT FOLLOWUP DATE	PRIORITY	REMARKS IF ANY

CUSTOMER DROP DOWN			
CATEGORY	LAST ACTIVITY	PRIORITY	NEXT ACTIVITY
Architects		Very High	Samples
Engineers	new Price list sended	High	New price list
Self interior	direct meeting	Medium	call
Carpenders	whatsapp broadcast	Low	Direct meeting
shop	called		
Builders	ask balance amount		invite to our godown/office
Interior			reminding call
House	Reminding call		Reminding message
	Reminding message		

MISSED CUSTOMER FOLLOWUP

SL NO.	MISSED FOLLOWUP DATE	NAME	PLACE	MOB NO	CATEGORY	STATUS	SOURCE OF CUSTOMER	PRIORITY	MISSED ACTIVITY	TOTAL BALANCE	REASON FOR MISSED	NEXT ACTIVITY	NEXT FOLLOWUP DATE	REMARKS	SALES MAN

CUSTOMER REVIEW BY TELECALLER OR MANAGER

SL NO:	CUSTOMER NAME	SOURCE	TOTAL SALES	CUSTOMER REVIEW			REVIEW %	REMARKS/COMPLAINTS IF ANY
			MONTH	QUALITY	SALES TEAM	DISPATCH		
				5	10	10	83.33	

*REPORTS

WE WANT **TOTAL LEADS REPORT** CAN BE FILTER BY SALES MAN,DATE

TOTAL MISSED FOLLOWUP REPORT WITH REASON BY A PERIOD ALSO USERVISE

REVIEW REPORT BY A PERIOD

NEW CUSTOMER REPORT IN A PERIOD

BELOW AVERAGE SALE CUSTOMER REPORT ACCORDING TO CURRENT MONTH OR MENTIONED MONTH

SALES COMPARISON REPORT(SALES MAN/USERS NAMES,COLLECTED AMOUNT,BILLED AMOUNT,BALANCE AMOUNT,COMMISION/DISCOUNTS GIVEN)

CUSTOMER REPORT -SALES MAN VISE.

SALES REPORT

[illegible]