

Everything You Need to Know About Lead Management Software



Welcome to **apnalead.com** - Your Partner in Streamlining Lead Automation.

On behalf of the entire team at **Apna Lead**, I'm thrilled to extend a warm welcome to you! We are delighted to have you onboard our lead automation platform, designed to revolutionize the way you manage leads and streamline your business processes.

At Apna Lead, we understand the critical importance of efficiently managing leads to drive business growth and success. With our cutting-edge automation system, you're poised to experience a seamless journey towards maximizing your lead potential and achieving your business objectives.

With our platform, you'll experience unparalleled convenience and efficiency as you harness the power of integration from multiple apps, including Google Ads, Facebook, Instagram Ads, Housing, Magic Bricks, and more.

Here are a few highlights of what you can expect from your experience with Apna Lead:

1. Effortless Lead Management: Say goodbye to manual data entry and tedious lead tracking. Our intuitive platform automates lead capture, organization, and follow-up, empowering you to focus on what truly matters – nurturing valuable client relationships.

2. Customizable Solutions: We recognize that every business is unique. That's why our platform offers customizable features and tailored solutions to suit your specific needs and preferences. Whether you're a small startup or a large enterprise, we've got you covered.

3. Real-Time Insights: Gain valuable insights into your lead generation efforts with our comprehensive analytics tools. Track key metrics, monitor performance trends, and make informed decisions to optimize your lead management strategy.

4. Exceptional Support: Your success is our top priority. Our dedicated support team is here to assist you every step of the way, providing prompt assistance and personalized guidance whenever you need it.

5. Seamless Workflow Automation: Streamline your workflow with automated processes that seamlessly connect lead generation activities across various apps. From lead capture to follow-up, our platform ensures smooth transitions and minimizes manual intervention, freeing up your time to focus on strategic initiatives.

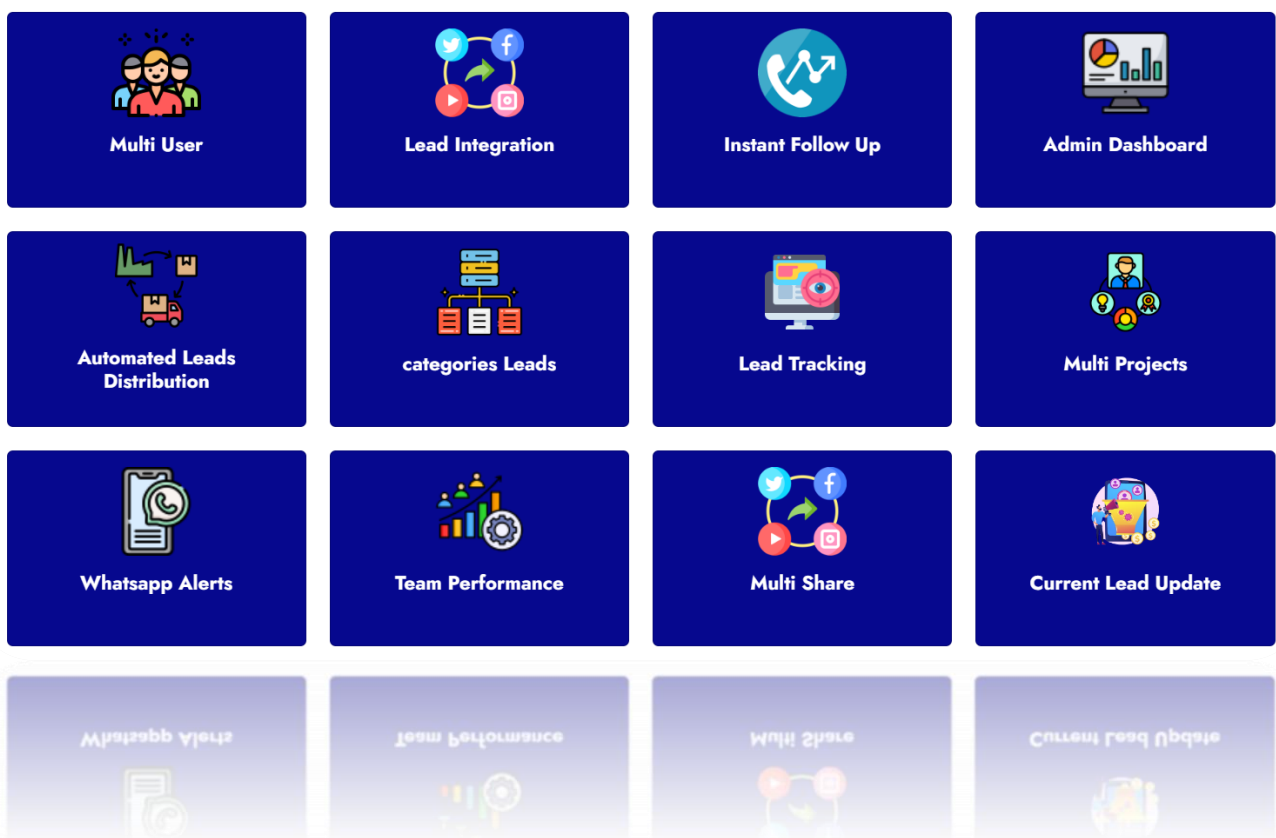
We are committed to helping you unlock the full potential of your leads and drive sustainable growth for your business. Thank you for choosing Apna Lead as your trusted partner in lead automation.

If you have any questions or need assistance getting started, please don't hesitate to reach out to us. We're here to help you succeed!

Once again, welcome to the **Apna Lead** community. We're excited to embark on this journey together.

APNA LEAD FEATURES

Apna lead crm provide you a variety of features, tools and plugins that help admin, users to focus on sales and never miss a single reminder, apna lead develop own tools and plugins that are suggested and provided by our research and development team.



STANDARD PLAN MODULES & SUB MODULES :

Below are the modules and sub-modules list that comes with standard version of apna lead. Modules will be provided as per device configuration and have separate modules for crm in web version and mobile app.

The screenshot displays the APNA-LEAD web application interface. At the top, there is a search bar labeled 'Search name, phone or email' and a user profile icon labeled 'Admin'. Below the search bar is a navigation menu with icons for Dashboard, All Leads, All Data, Projects, Users, Reports, Settings, Profile, and Logout. The main content area is titled 'ADD New team Member' and includes a 'Back to ALL Users' link. The 'Add Users' form contains the following fields: 'User FullName*' (with a placeholder 'Enter User Name'), 'Primary Contact Number*' (with a placeholder 'Enter User Name'), 'Primary Contact Email-ID*' (with a placeholder 'Enter User Name'), 'User Type*' (a dropdown menu currently set to 'Admin'), 'Reporting Member*' (a dropdown menu currently set to 'Admin @ 8826091800'), 'Work Group' (a dropdown menu currently set to 'Team A'), and 'Choose Project' (a dropdown menu currently set to 'Static Website'). At the bottom of the form are 'ADD USER' and 'Reset' buttons. To the right of the form is a section titled 'Your Added Users' which lists 11 users with their names, roles, and last update dates. At the bottom right of this list, it says '11/25 Users Left'.

Sl No	User Name	Role	Last Update
1	Admin	Admin	04 Oct, 2023 Update
2	Amrit	TeamMember	04 Oct, 2023 Update
3	Gaurav Singh	Digital	04 Oct, 2023 Update
4	Vimal	TeamMember	04 Oct, 2023 Update
5	Alka Upadhyay	TeamMember	04 Oct, 2023 Update
6	sangeeta	TeamMember	14 Oct, 2023 Update
7	Deepak sharma	TeamMember	21 Oct, 2023 Update
8	Aditi Pandey	TeamMember	16 Nov, 2023 Update
9	Prakash Tiwari	TeamMember	08 Dec, 2023 Update
10	Mohit Srivastava	TeamMember	08 Jan, 2024 Update
11	Anu Singh	TeamMember	18 Mar, 2024 Update

USERS: for creating team members, digital and admin accounts those start working on crm as well as mobile app. Both accounts first create via crm via primary admin, then users can able to login into mobile app in their respective company setup and condition set by their admin. This module is only manage by ADMIN user types. as standard plan we provide three types of login with access control, those are **ADMIN, DIGITAL & TEAM MEMBER**.

- **ADMIN:** manage complete crm and application. Have complete access over Apna lead.
- **DIGITAL:** there is limited access for digital who can only manage LEADS and DATA activity like upload bulk records of leads/data. Distribute uploaded records between different different team members according to their convenience. Also move leads/data from one team member to another team member. View, track and Export report of team member activity over provided leads and data. Digital also create projects and upload project/services/products relative documents like brochures, video and images that help team member in sharing with leads/data.
- **TEAM-MEMBER:** only manage provided data/leads and work on it, also set reminders for follow-ups, meetings, interview and other planned activity, crm and mobile app make a reminder on the set date & time. Team member also share project details directly on lead whatsapp phone number without saving their phone number.

SETTINGS

The screenshot shows the 'APNA-LEAD' dashboard with the 'Settings' menu item selected. The 'System Profile' tab is active, displaying a form for company details and billing address. The form includes fields for company name, industry type, company description, GST number, company area, city, country, company address, company landmark, state, and pincode. An 'Upload Company Logo' button is also present. The 'Update' button is visible at the bottom of the form.

System Profile

Upload Company Logo

Company Details

Company Name: APNA-LEAD

Industry Type: IT Services

Company Description: Exploring Ideas

Billing Address

GST Number: 8293SHQSLKL

Company Area/Locality: SECTOR-63

City: NOIDA

Country: BHARAT

Company Address: A-199 SECTOR 63

Company Landmark: HALDIRAM

State: UTTAR-PRADESH

Pincode: 201301

Update

SETTINGS: for company profile setup, billing details, subscription details. Only ADMIN can manage this.

- **SYSTEM-PROFILE :** for company profile and address.
- **ADVANCE SETTING:** for SMS, emails, notification, and features settings
- **APP CONFIGURATION:** for leads stages, project types, call types, team groups and much more configurations.
- **DATA COUNTERS:** for customized dashboard designing
- **INTEGRATION:** for leads platform integration
- **WEB-HOOK:** for website integration

PROJECTS/UTILITIES/SERVICES

APNA-LEAD

Search name, phone or email

Admin

Dashboard All Leads All Data Projects Users Reports Settings Profile Logout

Project Details : Apna Lead

Project Details Edit Details Project Marketing Material Add Material

Project Name
Apna Lead

Project Type
LMS

Project Description

Created At
04 Oct, 2023 02:59 pm

Updated At
04 Oct, 2023 02:59 pm

Created By
Admin

Project Pdf Files

Upload Marketing Material of project

Document Name Document Type Select File

Brochure Pdf Document Choose File PRE-SALE CRM - TD DIGITAL SOFT COPY.pdf

Save Files & Upload Files Cancel

Images

Brochure

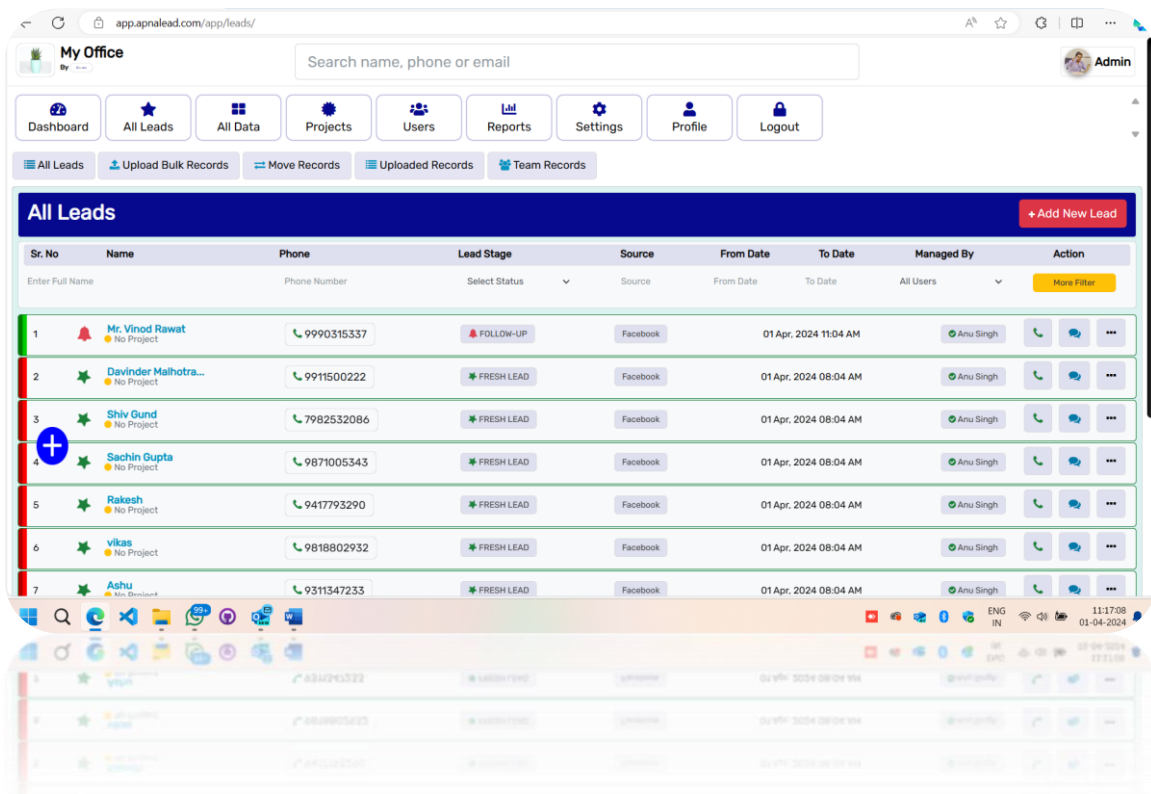
Youtube Videos

APNA LEAD YOUTUBE

PROJECTS/UTILITIES/SERVICES: both admin and digital can manage this module where they can save their sales utility cart like services, products, courses, openings, projects, and other utilities as per their industry normal, after saving primary details they can also upload brochure in pdf, images, YouTube links, and required material that help team member in sharing brief details of their businesses and services offer by them.

- **BROCHURES;** Admin/Digital can upload details document of their project. Services in pdf, they can upload around 5 documents for each entry.
- **IMAGES:** Admin/Digital can upload images of work, services details, team details around 10 images per entry.
- **VIDEOS:** Admin/Digital can add their YouTube video in project and service details as for brief introductions.

LEADS

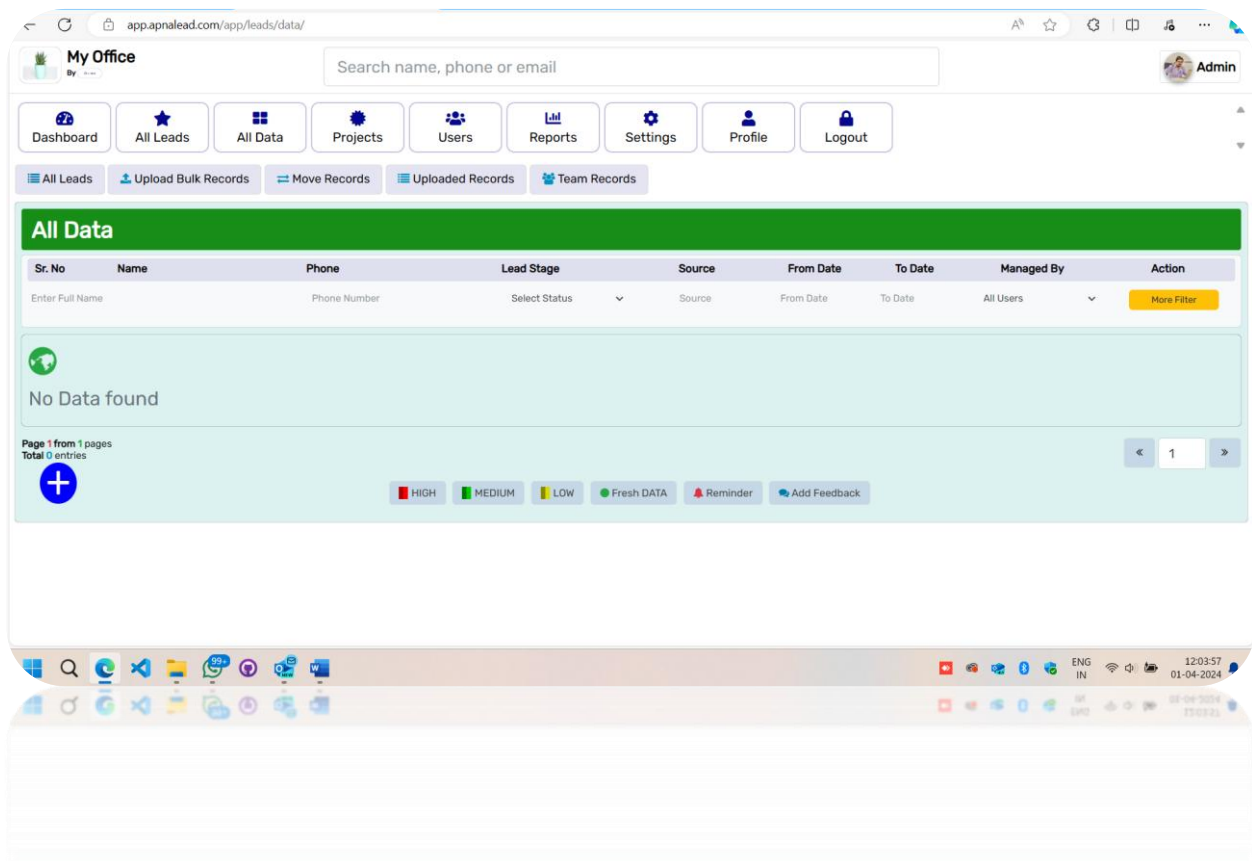


LEADS: this module can be managed by all login type and user type. Where they can manage their leads, setup reminders for follow-ups and meetings as per leads feedback after calling. Crm and app remind the users and creator on that date so that team never miss a single reminder. Users can work on both leads, one those are provided or transferred by digital users or create by self, also auto fetched from various lead sources and app.

SUB-MODULES:

- **NEW LEAD:** any user admin/digital/team can add and create new lead for self and add reminders and follows ups as per their convenient.
- **UPLOAD BULK RECORDS:** Only Admin/Digital can upload bulk records in csv file. Sample format is already attached where they can download uploaded one or create new csv file. Uploaded file can also be bind with project so they can easily create reports of different projects and their relative leads. After upload admin/digital/team admins can distribute uploaded in their team as per their comfort they can upload all, one by one, few selected records or new/old records in bulk count like 10, 20, 100, 1000.
- **MOVE RECORDS:** admin, digital, and team admin can move leads of their team in different user to user as per need or requirement. Lead movement also moved with leads reminders and follow-ups activities. So new assigned user easily checks and re-verify the previously discussed topics.
- **UPLOADED RECORDS:** admin and digital can only see their uploaded records through csv files. And then export upload records, they can also save bulk number of records as per their comfort and future needs.
- **TEAM RECORDS:** here admin/digital/team admin can see their team progress and activity like, how many leads, calls, reminders are scheduled by their team members as well as whole team. They can also view planned meetings of their team member and make day schedule as per team availability.

RAW DATA CALLING

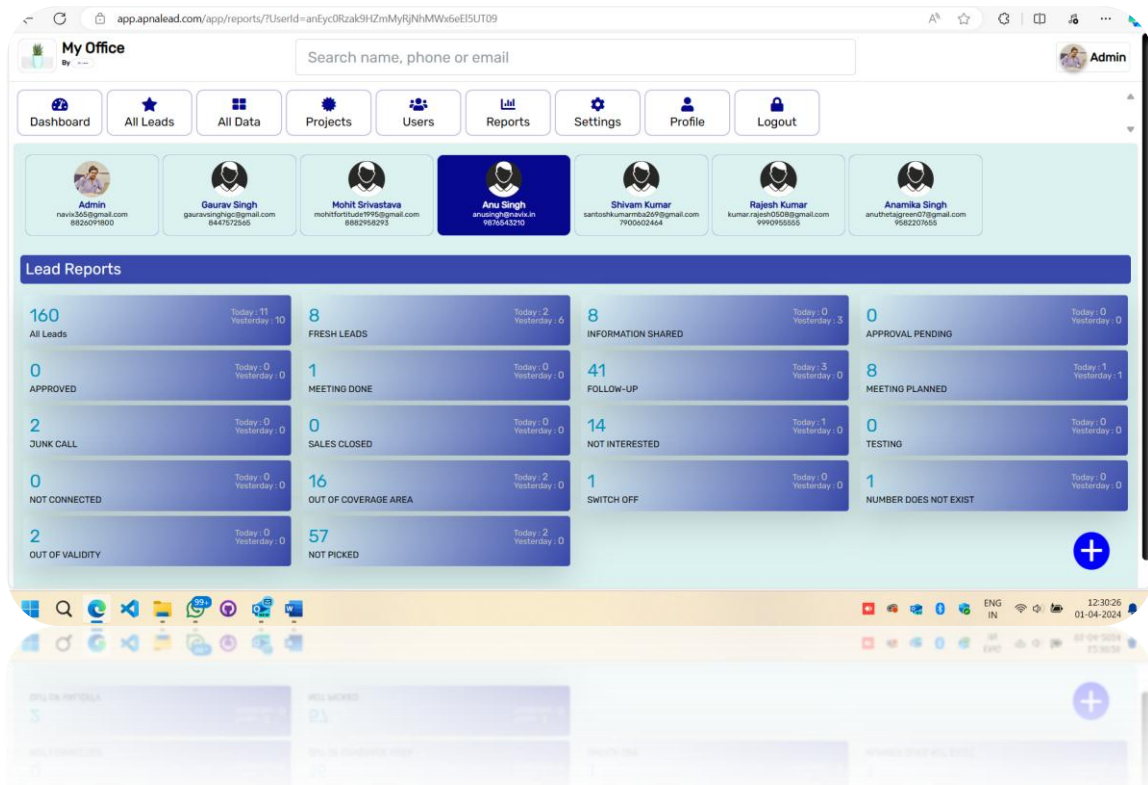


DATA: this module can be managed by all login type and user type. Where they can manage their raw data, setup reminders for follow-ups and meetings as per data feedback after calling. Crm and app remind the users and creator on that date so that team never miss a single reminder. Users can work on both data. Data can only be provided by admin and digital, user can't create their data in any method like they can't create single data entry or upload bulk number of data.

SUB-MODULES:

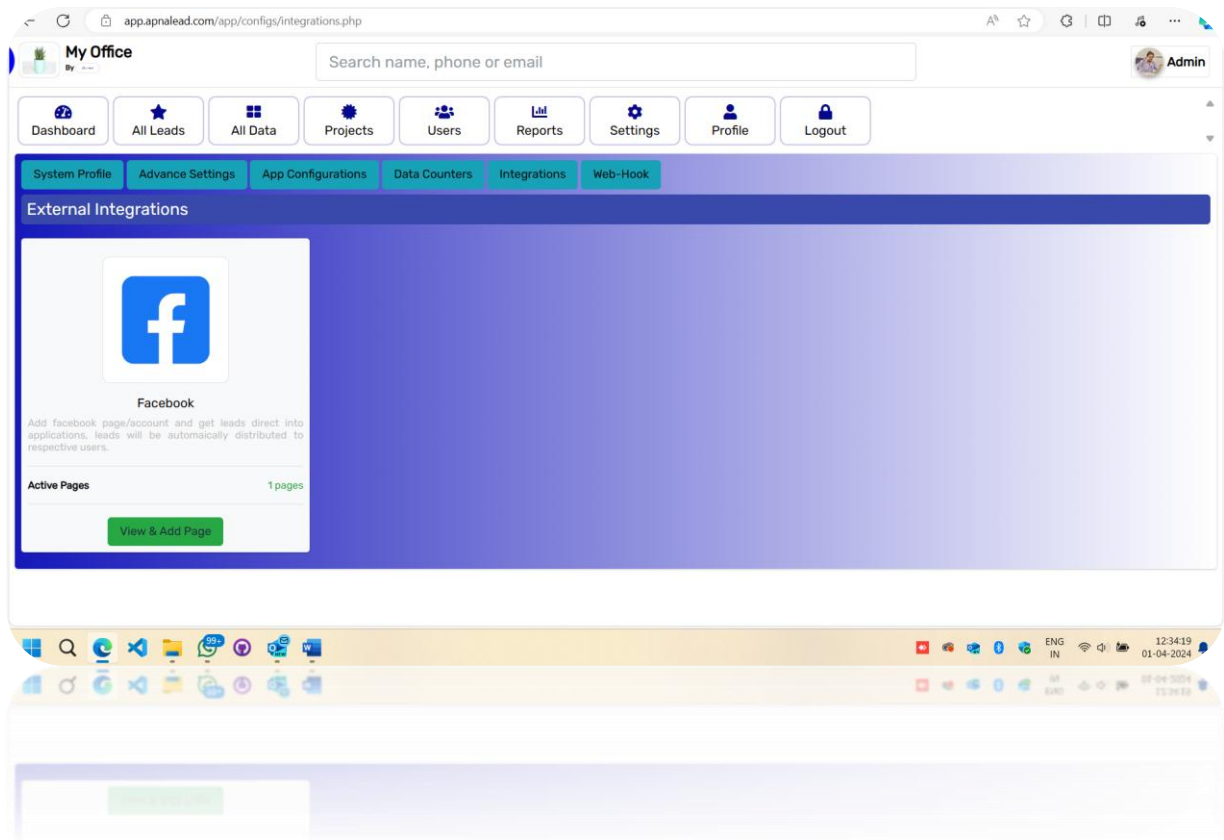
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REPORTS



REPORT: admin, team member and digital all users can see their reports and performance in report section so they are aware about their activities and improve their performance if report become low and not up to the mark.

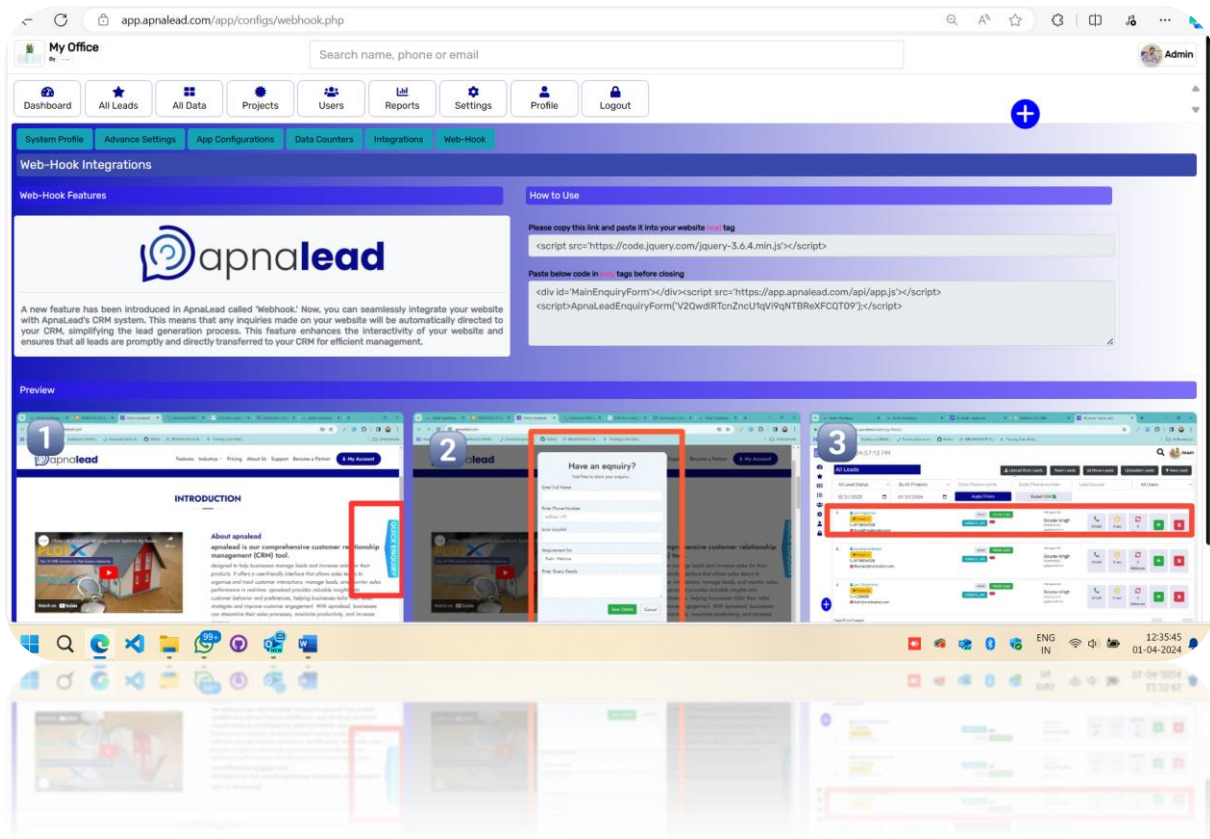
FACEBOOK API INTEGRATION



INTEGRATION: you can integrate some major and minor lead sources and platforms where leads are generated through various methods like ads campaign. Platform includes, facebook, Instagram, whatsapp, google ads, housing, 99acres, magic bricks and other platforms, simply share API details in support section and Apna lead team will add them, so that all leads from different sources land at a single place.

*** EVERY HOUR DATA IS REFRESH AND FRESH RECORDS ARE FETCHED FROM API**

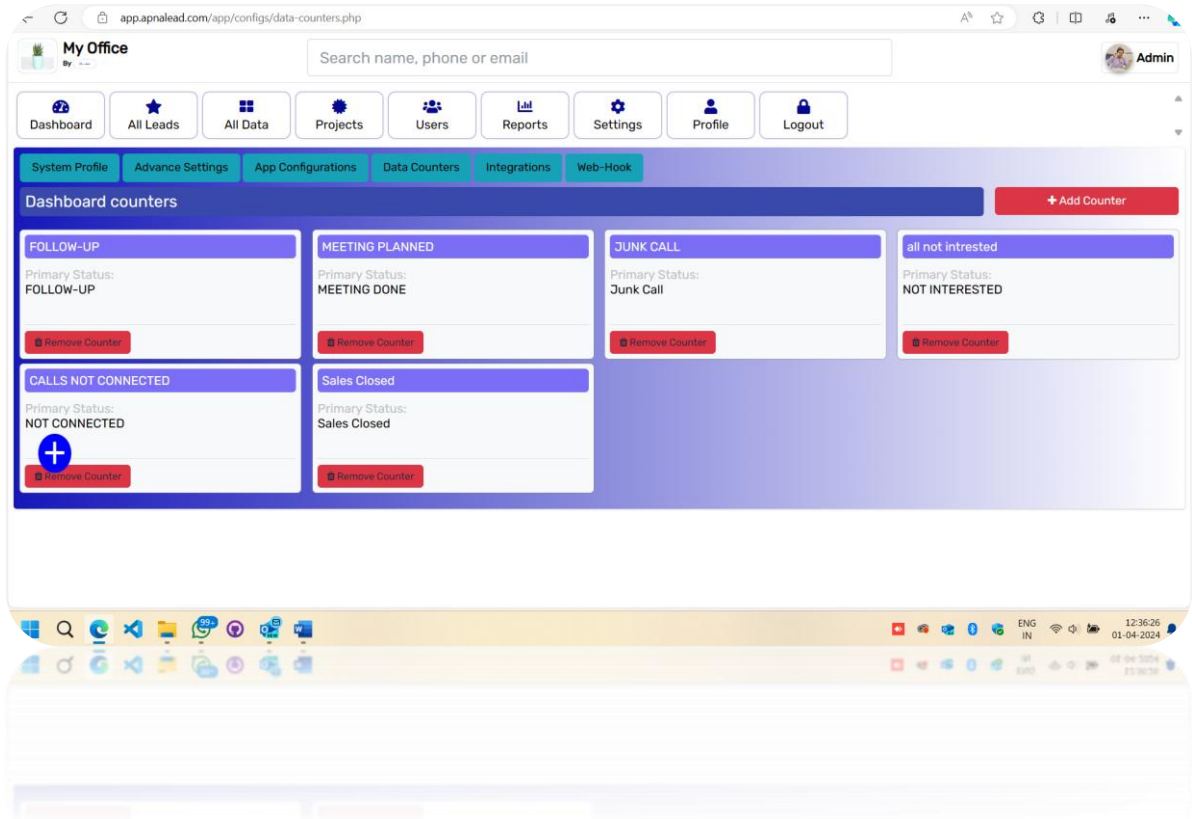
WEB-HOOK



WEB-HOOK: you can also integrate your website with Apna Lead crm and mobile so that website leads and enquiries also contact on priority based and increase the chance of sale conversion from web enquiries.

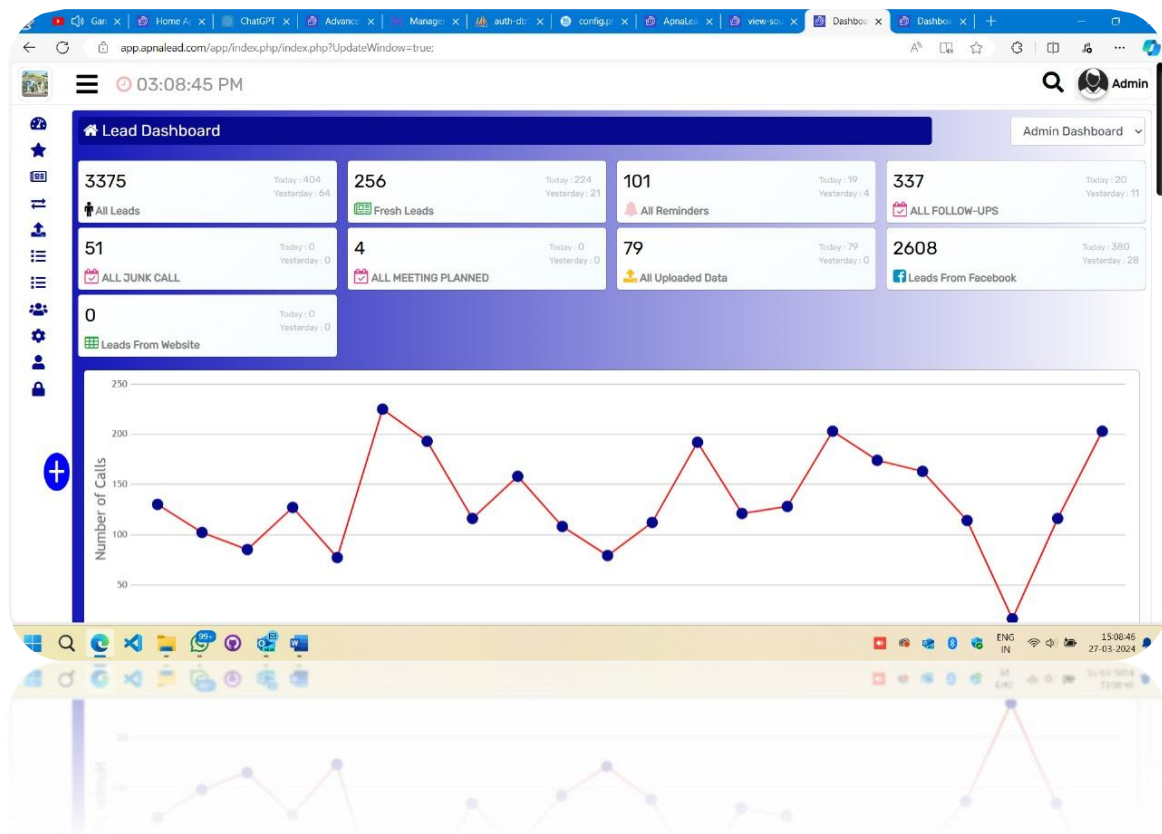
*** EVERY MINUTE DATA IS REFRESHED AND FRESH RECORDS ARE FETCHED FROM API**

DASHBOARD CONFIGURATION



CUSTOMIZED DASHBOARD: admin can create and design their own dashboard as per their need and requirement. Similar dashboard with user records shown to all team members.

CALLING REPORT



MONTHLY CALL FLOW CHART: at admin dashboard daily and monthly call flow chart is available so that admin can view and check every day calls report from their dashboard in just one click.

COST & SUBSCRIPTION PLAN :

- ONE TIME INSTALLATION FEE:** Rs.30000 will payable at installation/deployment time. This installation fee will be charged for;
 - Package Charge that include CRM, MOBILE & DESKTOP APP.
 - Installation & Deployment charges
 - Team Training charges
 - Facebook API setup & Integration
- MONTHLY SUPPORT, MAINTENANCE & UPGRADE FEE:** We will charge a nominal monthly support fee which is used in providing regular support on crm, and mobile app, maintenance, new updates, enhancing security plugins and R&D expenses. It also includes all future feature upgrades that comes under standard plan. These plan are three type, mentioned below;
 - YEARLY PLAN:** Rs.280/user/month payable every year.
 - HALF YEALY PLAN :** Rs.350/user/month payable in every six month.
 - MONTHLY PLAN:** Rs.500/user/month payable every month.

FREEBIES :

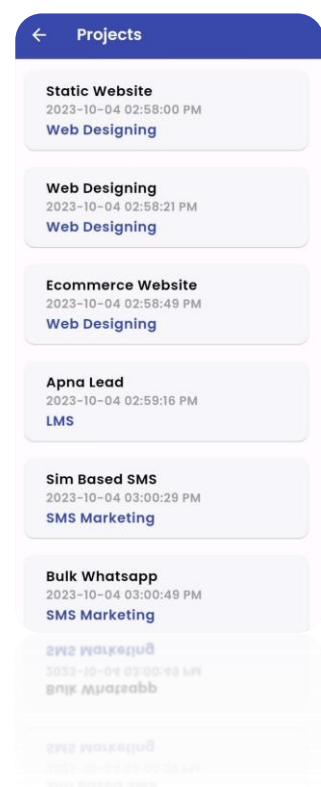
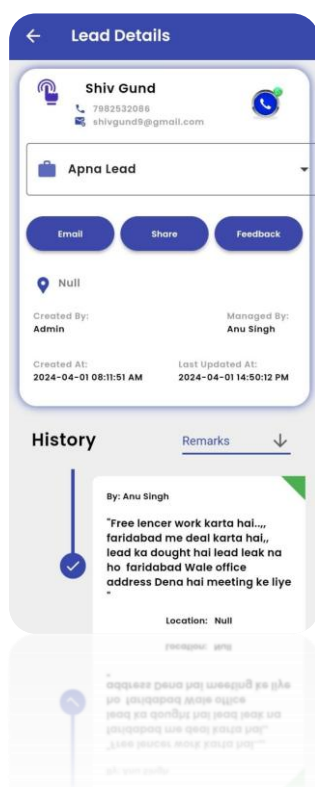
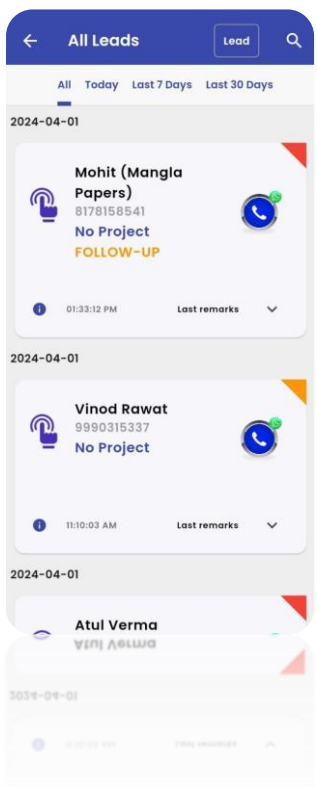
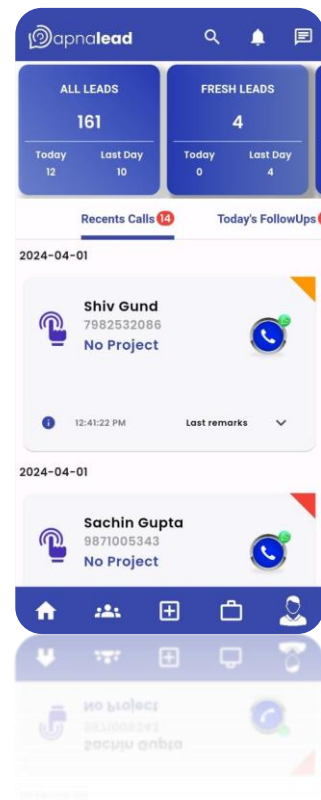
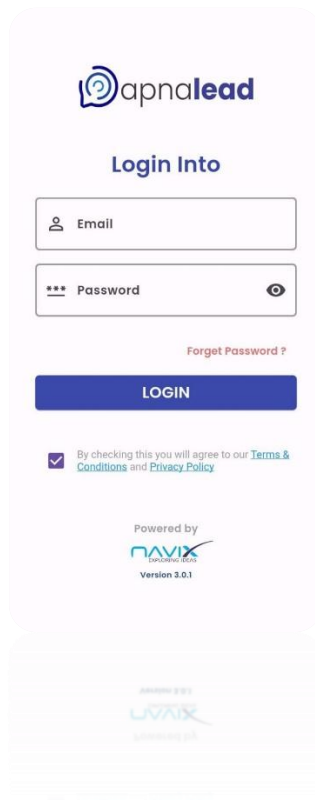
- FREE ONE FACEBOOK AD CAMPAIGN
- FREE AD CAMPAIGN CREATIVE LIKE VIDEO OR IMAGE
- FESTIVALE CREATIVES

NOTE: DAILY BUDGET OR AD BUDGET AMOUNT IS NOT INCLUDED. YOU HAVE TO PAY AD BUDGET AS PER YOUR NEED.

WHAT YOU GET:

ANDROID APP FOR USERS (SALES ONLY):

Android app is provided to sales team where they can make call over leads and data and set reminders or follow-ups as per their comfort or need. For fast and instant action we only added sales and calling module in the app. Its not create any confusion for sales regarding what to do or what not. Here are the few screenshot of mobile app.



PREMIUMS MODULES:



COMPLETE HR ERP

- Vacancy & Interview Modules
- Team Joining Process
- Document Management
- GPS Attendance Management
- Payroll Management
- Leave Management
- On Duty Leave management
- Holiday Calendar
- Rewards Modules
- Auto Birthday wishes
- Daily Motivational quotes
- Appraisal Management
- PIPs Management
- Assets Management
- Circular Management
- Team Training Module
- Auto Salary Slip Generation
- Expanse Management

- Rewards Modules
- Holiday Calendar

- Expanse Management
- Auto salary slip Generation



CRM-ACCOUNT-BILLING-SALES ERP

- Customer Management
- Sales Management
- Quotation Management
- Invoice & Billing
- Multi Account Transactions
- Customer Event Management
- Payment Reminder
- Subscription Management
- Refund & Cancellation
- Coupon Management
- Online Payment Collections
- Team Commission Management
- Sale Reports
- Monthly ledger creation
- Auto billing for subscriptions
- Activity & Tasks scheduling.

- Subscription Management
- Payment Reminder

- Activity & Task scheduling
- Auto billing for subscriptions



RECEPTION MANAGEMENT

- Interview Management
- Customer Visit Management
- Courier Management
- Team In-Out Management
- Out Of Office Activity Records
- Site Visits / On Site Activity
- Revisit Reports
- Intsant Team Alert for Visit
- Visit Waiting Management
- Separate payment collection
- Daily Visit Report
- Thanks email & sms alert to visitors
- Send Reminder to previous visits

- Revisit Reports

NOTES:

- Premium modules are add-on modules require to purchase a part from standard plan.
- Every premium module has separate cost and finale cost depend on requirement and modifications.
- Contact to support for purchase of premium modules.

TERMS AND CONDITIONS:

PURCHASES & BILLING:

1. One time installation and setup cost may vary from the current document and can be changed as per added features, or add-on of premium modules in the package.
2. Minimum five users billing is compulsory and applicable in all APNA-LEAD STANDARD PLAN.
3. After paying installation amount and taxes of APNA-LEAD STANDARD PLAN, we will install and deployed APNA-LEAD WITH STANDARD MODULES to you within 5 working days from the date of transaction.
4. It is compulsory to pay all subscription amount as per purchased plan or active plan on time, continued 2nd failure of payment result in de-activation of account. Re-activation of account will be only possible after clearing previous pending dues.
5. In case of closing account or permanent de-activation of account, admin/organization have to write an email at support@apnalead.com 30 days before their respective billing date mentioning the reason why they are closing the account.
6. Subscription amount may vary from organization to organization which depend on number of active users in billing period as well recent activity of active or inactive users.
7. Organization have to share all primary details that are require to create APNA-LEAD account and deploy the application.
8. All payment are payable in favor of NAVIX CONSULTANCY SERVICE and suitable taxes of 18% GST is applicable on transactions.
9. Valid account details for all payment are **Navix Consultancy Services, 921020049392100, UTIB0001575, AXIS BANK, SECTOR 37, FARIDABAD.**

TRAINING, DEPLOYMENT & SUPPORT:

1. Three on-site complete training of APNA LEAD is provided by sale executive, product specialist, and relative APNA-LEAD staff. After that training and support will be provided on online modes like on Google meet, AnyDesk, ZOOM, and other prefer and relevant method.
2. All APNA-LEAD users contact APNA-LEAD staff in office hours only which is 10:00 AM to 6:00 PM, MONDAY to SATURDAY. Saturday support time will be different and staff is available from 10:00 AM to 2:00 PM Only.
3. Every feedback or suggestion is important for a product. So all shared feedback and suggestion over support email support@apnalea.com or via <http://apnalead.com/support> will be rectify by our product specialist and backend team and solved on priority basis. Organization need to take patience for solution of major affected feedback.
4. Administrators and their users can't force APNA-LEAD staff in any way to solve their query first, all queries are important to us and all team of APNA-LEAD, so we solve and take action according to query priority level.

DATA SAFETY & SECURITY ASSURANCE:

1. With APNA-LEAD organization needs not to worry about any type of data loss or data in security.
2. APNA-LEAD staff never share or misuse of organization data due to our strict internal staff policy and also regular checkup of data and records by APNA-LEAD administers.
3. All data are backed up on cloud on daily basis, so users need not to worry about data loss.
4. APNA-LEAD also provide an option for export of their all data and record in csv.

HARDWARE AND SOFTWARE REQUIREMENTS:

1. All users and organization admin need to check their devices hardware and software compatibility with APNA-LEAD app and web-version application (crm).
2. Mobile app comes with all valid Play Store policy and if any user claim that any thing is not up to the mark, we would to suggest them please read App Play Store policy available at <https://play.google/developer-content-policy/>.
3. Mobile app functionality may vary from device to device and Android version or API level that changed and released by Play Store on regular basis.
4. Regular internet connection, mic, speaker, calling sim is required to make calls and proper use of APNA-LEAD app.
5. Any whatsapp chat, email, or sms will be delivered from the phone number or sim inserted at the time of activity performed. So admins have to take care of it they provided eligible or official phone numbers to the team.
6. API of integration platform will be required for data or lead fetching.
7. Facebook lead are automatically fetched on an interval of 1 hours. Latest fetch record will be available in Leads -> Uploaded Records with source tag of FACEBOOK, WEBSITE_API
8. WEBSITE Leads are fetched refreshed every minute.

APNA-LEAD END USER POLICY:

1. All users of APNA-LEAD cannot hire any APNA-LEAD employee including ex-employees and who are a part of APNA-LEAD TEAM in last 3 years.
2. Any APNA-LEAD user cannot force to APNA-LEAD staff to share working process, core features or any upcoming features.
3. All APNA-LEAD users cannot make a clone of APNA-LEAD, if any one found to do the same, then necessary action will be taken against them.
4. All APNA-LEAD users cannot share app and web version details to other firm to make similar product for them, if such thing found the that users or administrator are liable to pay the net cost of complete project including applicable charges and legal actions.

FUTURE UPGRADES & ADD-ON PLUGINS:

1. All feature and add-on plugins are provided to all APNA-LEAD users. Only standard features, plugins are free and comes with APNA-LEAD STANDARD PLAN.
2. UI & UX updates are free to all users till their active date. No need to pay any amount for that.
3. Modules and sub-modules that comes under STANDARD PLAN are always free and their future upgrades will be deliverable to all APNA-LEAD user and provided on regular basis on time to time.
4. We live all changes and updates in night around after 10:00 PM, so changes will be affect and visible to all users in next morning.
5. Don't forget to share feedback and review at <https://maps.app.goo.gl/vq66LSGAfKT9NvJLA>

PREMIUM MODULES:

- All Premium modules are chargeable and price may vary from user to user as per their requirement. Separate quotation will be shared to users if required. You can also contact to administrator or email at support@apnalead.com for purchase and enquiry of premium modules.
- Premium modules are optional, user to have to purchase them separately.
- Premium modules delivery time also differ and depend on purchased modules, shared changes, and process of working.



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