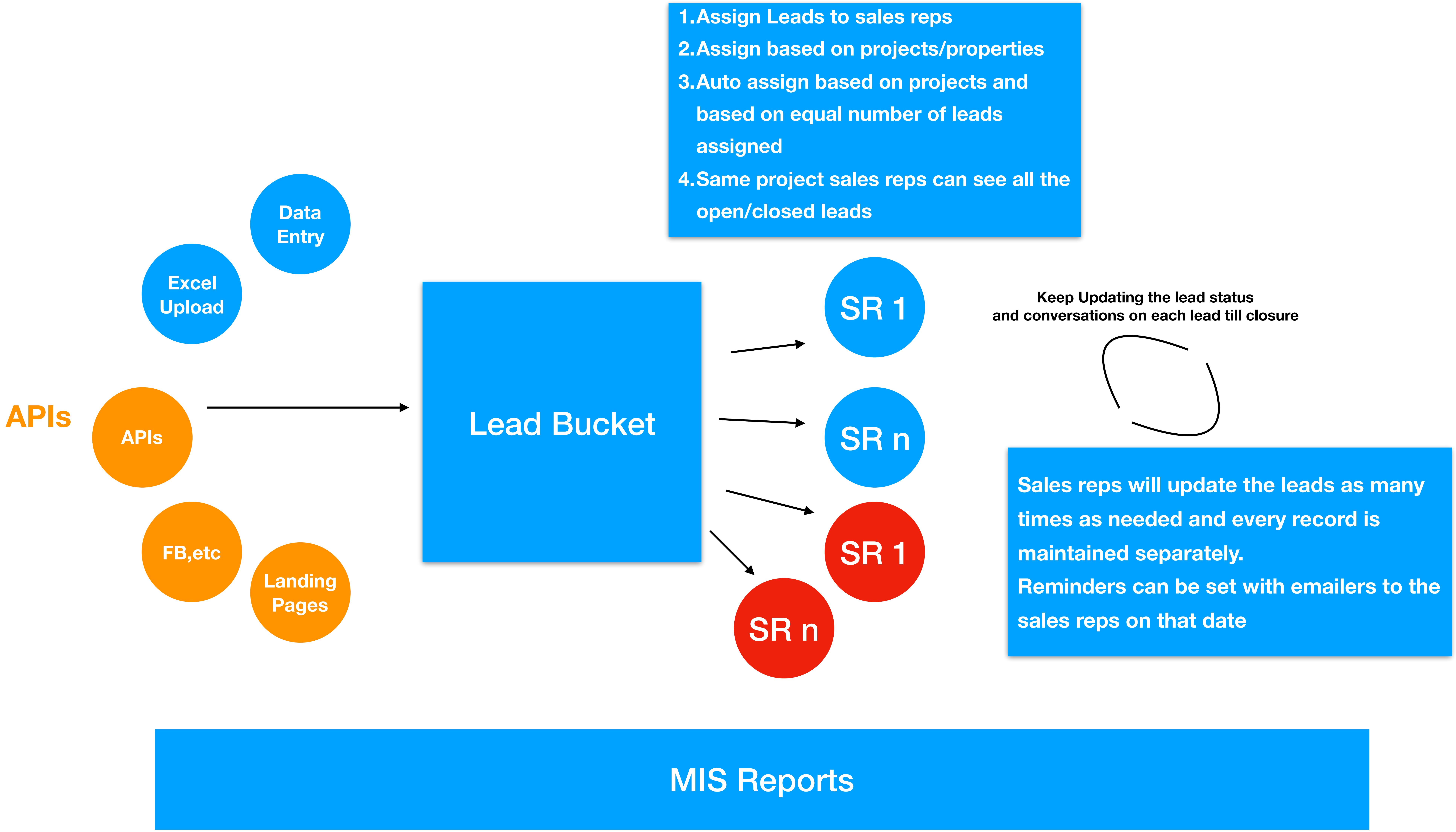
Lead Management - Raheja

A high level flow document

Application Flow



Sample Masters

Access Master for admin and Sales screens

Employee Database Master

Status Master - Lead Status

Area Master

Country Master

City Master

Username/Pwds Master for APIs

Projects Master

Sales Reps - Projects Link Master

Escalation Matrix Master

Screens - Sales - Manager Screens

1. Sales Reps Login Screen
2. Dashboard (one for sales manager and one for sales reps)
    1. Sales Manager
        1. No of open leads
            1. **On Click can see the list of open leads**
                1. **On click of a lead can see the work done on it**
        2. No. Leads worked today
            1. Similar to 1.1 in blue
        3. New leads
            1. Similar to 1.1 in blue
        4. Projects
            1. On click of a project details including pdf, no of leads come for that project, open leads, closed leads and converted leads. can also see the teams/reps assigned to this project. Leads coming from the source and number of that per source.
        5. Project wise teams
            1. On click of shows me the reps working on this and on click of a rep
            2. It opens the leads list of the reps and on click of a leads it follows 1.1 in blue
        6. Sales reps assigned leads
            1. On click of this I can see a list of sales reps with the projects and no of open/closed/converted leads
        7. Open and Closed Lead
            1. List of open and close leads and on click of the same will follow 1.1.1
        8. Converted leads
            1. Similar to 7.1
        9. Escalation Leads
            1. Similar to 7.1
        10. Unassigned leads
            1. Can see the leads and of which project and can assign a lead to a sales rep
            2. On this screen can assign a lead to a sales rep

Screens - Sales - Reps Screens

1. Reps Dashboard
    1. Open Leads
        1. **Click on the above and it shows a list of open leads**
            1. **If I click on one lead then a screen with data entry for that lead shows up. Earlier entries for this lead can be seen in the bottom in a grid where as the above will show the data entry for that lead**
    2. Closed Leads
        1. Follows 1.1 but cannot enter data but can change the status back to open if need be and enter data
    3. Escalated Leads
        1. Similar to 1.1 in red
    4. New Leads Assigned
        1. Similar to 1.1 in red
    5. Not worked on leads
        1. Similar to 1.1 in red
2. Reminders

Admin Screens

Access Master for admin and Sales screens

Employee Database Master

Status Master - Lead Status

Area Master

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Username/Pwds Master for APIs

Projects Master

Sales Reps - Projects Link Master

Escalation Matrix Master

Profession Master Table
Project Master
TimetoBuy(in months and immediate)
Status Master(for Lead)

MIS Reports

1. **Projects - List of projects with open/close/converted leads and total leads. leads from which source, no of reps working on it**
2. **Avg time taken to close leads and avg time to convert leads**
3. **Lead Source Reports - leads from which source and closure of the same percentages etc**
4. **Reps wise lead closure reports**
5. **Reps wise performance reports**
6. **Escalation Reports**

Lead Management Screen

Lead Management Screen

Discussion

Next Call (date) **Status** (date) +

Project Master

Project Name: In solutions inside page, below the main

State

City

Area

Address

Configuration

Size

Price

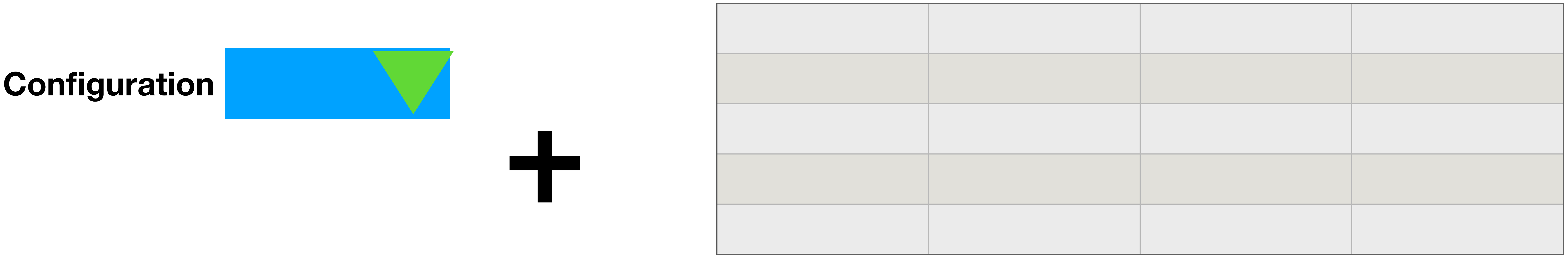
+

Brochure Upload

Payment Plan

Scheme

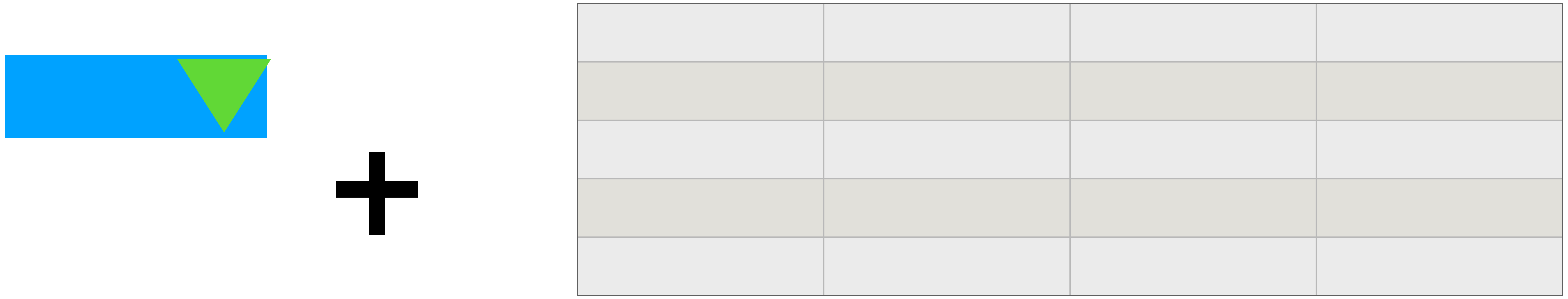
Configuration Master (CRUD)



Ganesh

Scheme Master (CRUD)

Configuration



Ganesh

Payment Plan Link Table - Projects

Project 1	PP1	Slabwise		
Project 1	PP2			