

Masters Lead Management Oppurtunities Sale Order Sales Invoice

Oppurtunity Status Industry Category Product Category Sales Order Status Reference Couriers Vendor Category Ref Group

Status

☐

Enable/Disable

Sort Order

Add

Sl	Status	Enable/disable	Sort Order		
1	Prospecting	<input checked="" type="checkbox"/>	1	Edi	De
2	Analysis	<input checked="" type="checkbox"/>	2	Edi	De
3	Presentation	<input checked="" type="checkbox"/>	3	Edi	De
4	Samples Provided	<input checked="" type="checkbox"/>	4	Edi	De
5	Samples Approved	<input checked="" type="checkbox"/>	5	Edi	De
6	Negotiation To Pilot	<input checked="" type="checkbox"/>	6	Edi	De
7	Pilot Lot Order	<input checked="" type="checkbox"/>	7	Edi	De
8	Quoted	<input checked="" type="checkbox"/>	8	Edi	De
9	Final Review	<input checked="" type="checkbox"/>	9	Edi	De
10	Hold/Postpone	<input type="checkbox"/>	10	Edi	De
11	Closed/Won	<input checked="" type="checkbox"/>	11	Edi	De
12	Closed/Lost	<input checked="" type="checkbox"/>	12	Edi	De
13	Others	<input checked="" type="checkbox"/>	13	Edi	De

Industry Category

Add

Sl No	Industry		
1	Nursing	Edi	De
2	Mall	Edi	De
3	Hospital	Edi	De

Masters Lead Management Oppurtunities Sale Order Sales Invoice

Oppurtunity Status Industry Category Product Category Sales Order Status Reference Couriers Vendor Category Ref Group

Category

Sl No	Product Category		
1	Drivers	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
2	Luminous	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Status

Add

Sl	Enable/Disab	Status	Sort Order	
1	<input checked="" type="checkbox"/>	In Progress	1	<input type="button" value="Edit"/> <input type="button" value="De"/>
2	<input checked="" type="checkbox"/>	Waiting For Approval	2	<input type="button" value="Edit"/> <input type="button" value="De"/>
3	<input checked="" type="checkbox"/>	Hold/No Stock	3	<input type="button" value="Edit"/> <input type="button" value="De"/>
4	<input checked="" type="checkbox"/>	Testing	4	<input type="button" value="Edit"/> <input type="button" value="De"/>
5	<input checked="" type="checkbox"/>	Packed/Delivered	5	<input type="button" value="Edit"/> <input type="button" value="De"/>

Address

Mobile Number

Add

[illegible]

\_\_\_\_\_

Add

[illegible]

\_\_\_\_\_

Add

[illegible]

\_\_\_\_\_

Add

[illegible]



Lead Management

Lead LD00006

Primary Contact

Secondary Contact

Vendor Category OEM ▼

Industry Hospital ▼

Name Client6

Contact Person Client Contact

Contact Person

Class A

Class B

Mall

Industry

Address 1323 main st

Designation CEO

Designation

Referred By Employee2 ▼

☐ Add To Account

Email client@client.com

Mail Id contact@client.com

Mail Id

Ref Group Distributor ▼

Contact No 2154747

Ph/Mob No 1454747

Ph/Mob No

Create Lead

Cancel

Lead Summary

Account Summary

search

Lead No	Category	Name	Address	Email	Contact No	Contct Person	Designation	Mail Id	Ph/Mob No	Referred By
LD00001	OEM	Client1	123 main st	client@client.com	2145141	Client Contact	CEO	contact@client.com	2547747	Employee1
LD00002	OEM	Client2	124 main st	client@client.com	2154141	Client Contact	CEO	contact@client.com	2347747	Employee2
LD00003	Class A	Client3	153 main st	client@client.com	2123141	Client Contact	CEO	contact@client.com	2556747	Employee3
LD00004	Class B	Client4	183 main st	client@client.com	2876141	Client Contact	CEO	contact@client.com	2589747	Employee4
LD00005	Class B	Client5	963 main st	client@client.com	2106541	Client Contact	CEO	contact@client.com	2508747	Employee5

Edit Delete

Edit Delete

Edit Delete

Edit Delete

Edit Delete

search

Close

[illegible]

### Follow Ups for the Week (2)

[illegible]

Lead LD00006

Close

Category

OEM

Industry

Hospital

Contact Person

Designation

Mail Id

Ph/Mob No

Name

Client1

Email

client@client.com

Primary Contact

Client Contact

CEO

contact@client.com

1454747

Address

123 main st

Contact No

2154747

Secondary Contact

Called for Negotiation on 15th

Follow Up Date

15/04/2014

Referred By

Employee2

Reference

Distributor

Update

Cancel

search

Date	Comments	Follow Up Date
02/14/2014	Shown a demo	04/04/2014
01/04/2014	Spoke To Brigade Group	04/04/2014

Lead LD00006 Category OEM Industry Hospital Contact Person Designation Mail Id Ph/Mob No Close

Name Client1 Email client@client.com Primary Contact Client Contact CEO contact@client.com 1454747

Address 123 main st Contact No 2154747 Secondary Contact

Follow Up Date  /

Referred By Employee2

Reference Distributor

Update

Cancel

Date	Comments	Follow Up Date
04/04/2014	Called for Negotiation on 15th	15/04/2014
02/14/2014	Shown a demo	04/04/2014
01/04/2014	Spoke To Brigade Group	04/04/2014

## Lead Management

Primary Contact		Secondary Contact		Category	Industry
Name	<input type="text"/>	Contact Person	<input type="text"/>	<input type="text" value="OEM"/> Class A Class B	<input type="text" value="Hospital"/> Mall Industry
Address	<input type="text"/>	Designation	<input type="text"/>	Referred By <input type="text" value="Employee2"/>	
Email	<input type="text"/>	Mail Id	<input type="text"/>	Reference <input type="text" value="Distributor"/>	<input type="checkbox"/> Add to Account
Contact No	<input type="text"/>	Ph/Mob No	<input type="text"/>		

Lead Summary

Account Summary

Create Lead

Cancel

Q search

Lead Created!!!

Lead Created Sucessfully

Ok

Lead No	Name	Address	Contact Person	Designation	Mail Id	Ph/Mob No	Referred By
LD00001	Client1	123 main st	Client Contact	CEO	contact@client.co	2547747	Employee1
LD00002	Client2	124 main st	Client Contact	CEO	contact@client.co	2347747	Employee2
LD00003	Client3	153 main st	Client Contact	CEO	contact@client.co	2556747	Employee3
LD00004	Client4	183 main st	Client Contact	CEO	contact@client.co	2589747	Employee4
LD00005	Client5	963 main st	Client Contact	CEO	contact@client.co	2508747	Employee5
LD00006	Client6	1323 main st	Client Contact	CEO	contactc@client.co	1454747	Employee2

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete

## Lead Management

Primary Contact		Secondary Contact		Category	OEM ▼ Class A Class B	Industry	Hospital ▼ Mall Industry
Name	<input type="text"/>	Contact Person	<input type="text"/>	Contact Person	<input type="text"/>		
Address	<input type="text"/>	Designation	<input type="text"/>	Designation	<input type="text"/>		
Email	<input type="text"/>	Mail Id	<input type="text"/>	Mail Id	<input type="text"/>		
Contact No	<input type="text"/>	Ph/Mob No	<input type="text"/>	Ph/Mob No	<input type="text"/>		

Create Lead

Cancel

Lead Summary

Account Summary

Q search

Lead No	Name	Address	Email	Contact No	Contct Person	Designation	Mail Id	Ph/Mob No	Referred By
LD00001	Client1	123 main st	client@client.c	2145141	Client Contact	CEO	contact@client.	2547747	Employee1
LD00002	Client2	124 main st	client@client.c	2154141	Client Contact	CEO	contact@client.	2347747	Employee2
LD00003	Client3	153 main st	client@client.c	2123141	Client Contact	CEO	contact@client.	2556747	Employee3
LD00004	Client4	183 main st	client@client.c	2876141	Client Contact	CEO	contact@client.	2589747	Employee4
LD00005	Client5	963 main st	client@client.c	2106541	Client Contact	CEO	contact@client.	2508747	Employee5
LD00006	Client6	1323 main st	client@client.c	2154747	Client Contact	CEO	contatc@client.	1454747	Employee2

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete

Opportunity

Work No - WK000005

Company Information

Lead Name Client5 ▼

Product Driver5 ▼

Contact Person Person 7

Company Company 5

Client6

Others Driver1  
Others

Designation CEO

Description Description 5

Quantity 5487

Mail Id contact @client.com

Product Drivers ▼

Date 10/04/2014

Ph/Mob No 2547878

Create Opportunity

Cancel

Luminous

Opportunity Management

Samples Management

search

Work No	Lead Name	Description	product	Quantity	Date	Contact	Designation	Mail ID	Ph/Mob No	Company
WK000001	Client1	Description1	Driver 1	5000	08/04/2014	Person1	CEO	contact@client.com	2547747	Company 1
WK000002	Client2	Description2	Driver 2	5800	09/04/2014	Person2	CEO	contact@client.com	2478747	Company 2
WK000003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.com	2544597	Company 3
WK000004	Client4	Description4	Driver 4	6000	28/04/2014	Person4	CEO	contact@client.com	2544577	Company 4

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete

Opportunity

Work No - WK000005

Lead Name Client5

Client6

Description Description 5

Product Drivers

Luminous

Product

Driver5

Others

Driver1

Others

Quantity

5487

Date

10/04/2014

Company Information

Contact Person

Person 7

Company

Company 5

Designation

CEO

@client.com

Created Successfully!!

Opportunity created successfully!!

Ok

Create Opportunity

Cancel

Opportunity Management

search

Work No	Lead Name	Description	product	Quantity	Date	Contact	Designation	Mail ID	Ph/Mob No	Company
WK000001	Client1	Description1	Driver 1	5000	08/04/2014	Person1	CEO	contact@client.com	2547747	Company 1
WK000002	Client2	Description2	Driver 2	5800	09/04/2014	Person2	CEO	contact@client.com	2478747	Company 2
WK000003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.com	2544597	Company 3
WK000004	Client4	Description4	Driver 4	6000	28/04/2014	Person4	CEO	contact@client.com	2544577	Company 4

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete



Oppurtunity

Company Information

Oppurtunity Management

Lead Name

Client5 ▼

Client6

Product

Driver5 ▼

Driver1

Others

Contact Person

Company

Others

Designation

Description

Quantity

Mail Id

Product

Drivers ▼

Luminous

Date

//

Ph/Mob No

Create Oppurtunity

Cancel

search

Work No	Lead Name	Description	product	Quantity	Date	Contact	Designation	Mail ID	Ph/Mob No	Company
WK000001	Client1	Description1	Driver 1	5000	08/04/2014	Person1	CEO	contact@client.com	2547747	Company 1
WK000002	Client2	Description2	Driver 2	5800	09/04/2014	Person2	CEO	contact@client.com	2478747	Company 2
WK000003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.com	2544597	Company 3
WK000004	Client4	Description4	Driver 4	6000	28/04/2014	Person4	CEO	contact@client.com	2544577	Company 4
WK000005	Client5	Description5	Driver 5	5487	10/04/2014	Person7	CEO	contact@client.com	2547878	Company 5

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete

Close

Q search

[All \(4\)](#) [Prospecting \(0\)](#) [Analysis \(1\)](#) [Presentation \(0\)](#) [Samples Provided \(0\)](#) [Samples Appr \(0\)](#) [Nego to Pilot\(0\)](#) [Pilot Lot Order \(0\)](#) [Quoted \(1\)](#) [Final Review \(1\)](#) [Hold/Postpone\(0\)](#) [Closed/Won \(10\)](#) [Closed/Lost \(12\)](#) [Others \(0\)](#)

Work No	Lead Name	Description	product	Quantity	Date	Contact	Designation	Mail ID	Ph/Mob No	Company	Status
WK000001	Client1	Description1	Driver 1	5000	08/04/2014	Person1	CEO	contact@client.co	2547747	Company 1	Proposal
WK000002	Client2	Description2	Driver 2	5800	09/04/2014	Person2	CEO	contact@client.co	2478747	Company 2	Negotiation
WK000003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.co	2544597	Company 3	Final Review
WK000004	Client4	Description4	Driver 4	6000	28/04/2014	Person4	CEO	contact@client.co	2544577	Company 4	Analysis

Edit

Edit

Edit

Edit

[SaleOrder to be Issued \(0\)](#)

Close

search

[All \(4\)](#) [Prospecting \(0\)](#) [Analysis \(1\)](#) [Presentation \(0\)](#) [Samples Provided \(0\)](#) [Samples Appr \(0\)](#) [Nego to Pilot\(0\)](#) [Pilot Lot Order \(0\)](#) [Quoted \(1\)](#) [Final Review \(1\)](#) [Hold/Postpone\(0\)](#) [Closed/Won \(10\)](#) [Closed/Lost \(12\)](#) [Others \(0\)](#)

Work No	Lead Name	Description	product	Quantity	Date	Contact	Designation	Mail ID	Ph/Mob No	Company	Status
WK000004	Client4	Description4	Driver 4	6000	28/04/2014	Person4	CEO	contact@client.co	2544577	Company 4	Analysis

Edit

Close

Oppurtunity

Work No - WK000004

Lead Name

Client 4

Product

Driver 4

Status

Presentation ▼

Presentation sent

Description

Description 4

Quantity

6000

Date

28/04/2014

Proposal

Samples provided

Samples Approved

Contact Person

Person 4

Product Category

Drivers

Company

Company 4

Project Amount

2,00,00

Update

Cancel

Comments

Updated By

Status

Date

Analysis Done

User1

Analysis

01/04/2014

Spoke abt the requirement

user1

Proposal

31/03/2014

Close

Oppurtunity

Work No - WK000004

Lead Name Client 4

Product Driver 4

Status

Presentation ▼

Presentation sent

Description

Description 4

Quantity 6000

Samples provided  
Samples Approved

Date 28/04/2014

Contact Person Person 4

Company Company 4

Project Amount 2,00,00

Update

Cancel

Product Category Drivers

Comments	Updated By	Status	Date
Presentation sent	User1	Presentation	02/04/2014
Analysis Done	User1	Analysis	01/04/2014
Spoke abt the requirement	user1	Proposal	31/03/2014

Close

Oppurtunity

Work No - WK000003

Lead Name Client 3 Product Driver 3 Status Closed/Won ▼

Description Description 3 Quantity 7000  
Date 18/04/2014

Contact Person Person 3

Product Category Drivers Company Company 3 Project Amount 2,00,00

Update

Cancel

Got the order - PO No - 001212

Comments	Updated By	Status	Date
Analysis Done	User1	Analysis	01/04/2014
Spoke abt the requirement	user1	Proposal	31/03/2014

Close

Oppurtunity

Work No - WK000003

Lead Name Client 3

Product

Driver 3

Status

Closed/Won ▼

If samples provided is selected as status, button will be enabled

Description

Description 3

Quantity

7000

Create Samples

Date

18/04/2014

Contact Person Person 3

Create Sale Order

Cancel

Product Category Drivers

Company

Company 3

Project Amount

2,00,00

Comments	Updated By	Status	Date
Got the order - PO No - 001212	User1	Closed/Won	02/04/2014
Analysis Done	User1	Analysis	01/04/2014
Spoke abt the requirement	user1	Proposal	31/03/2014

Close

Q search

[All \(4\)](#)
[Prospecting \(0\)](#)
[Analysis \(1\)](#)
[Presentation \(0\)](#)
[Samples Provided \(0\)](#)
[Samples Appr \(0\)](#)
[Nego to Pilot\(0\)](#)
[Pilot Lot Order \(0\)](#)
[Quoted \(1\)](#)
[Final Review \(1\)](#)
[Hold/Postpone\(0\)](#)
[Closed/Won \(10\)](#)
[Closed/Lost \(12\)](#)
[Others \(0\)](#)

Work No	Lead Name	Description	product	Quantity	Date	Contact	Designation	Mail ID	Ph/Mob No	Company	Status
WK000001	Client1	Description1	Driver 1	5000	08/04/2014	Person1	CEO	contact@client.co	2547747	Company 1	Proposal
WK000002	Client2	Description2	Driver 2	5800	09/04/2014	Person2	CEO	contact@client.co	2478747	Company 2	Negotiation
WK000003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.co	2544597	Company 3	Closed/Won
WK000004	Client4	Description4	Driver 4	6000	28/04/2014	Person4	CEO	contact@client.co	2544577	Company 4	Analysis

Edit

Edit

Edit

Edit

[SaleOrder to be Issued \(1\)](#)

Q search

Work No	Lead Name	Description	product	Quantity	Date	Contact	Designation	Mail ID	Ph/Mob No	Company	Status
WK000003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.co	2544597	Company 3	Closed/Won

SO



SO No - SO000001

Lead Name      Client 3

Quantity

5487

PO Number 001212

Shipping Address

11/11/2016

☐

Courier - SelfPay

☒

Courier - Customer

### Description

Description 3

Date

10/04/2014



Billing Address

\_\_\_\_\_

Courier by

DTDC



### Product Category Drivers

Contact Person

Person 7

Product

### Product 3

Company

#### Company 5

Create SO

Cancel

### Sale Order Summary

Sale Order Approval
---------------------

[illegible]

SO No - SO000002

Quantity

10/10/2016

Shipping Address

\_\_\_\_\_

☐ Courier - SelfPay  
☒ Courier - Customer

### Description

\_\_\_\_\_

Date \_\_\_\_\_

10/04/2014



Approved By Person A

Person B

Person C

Billing Address

\_\_\_\_\_

Courier by

DTDC

Product Category

Contact Person

11/11/2019

Company

Product

Create SO

Cancel

[illegible] search

Edit

SI

- Sales Invoice

Invoice Number	INV 00012	Quantity	5487
----------------	-----------	----------	------

Company	Company 3	PO Number	001212
---------	-----------	-----------	--------

Address	Address 3	Unit Price
---------	-----------	------------

Product	Product 3	Applicable Tax
---------	-----------	----------------

5.5%

14.5%

12.36%

CST

Create Invoice

Cancel

 search[illegible]

- Sale Order

SO No -

Lead Name      Client 3

Quantity

5487

PO Number 001212

Shipping Address

11/11/2019

☐ Courier - SelfPay  
☒ Courier - Customer

### Description

Description 3

Date \_\_\_\_\_

10/04/2014



Approved By Person A Billing Address

Person B

Billing Address

\_\_\_\_\_

Person C

Courier by

DTDC

Product

Product 3

Company

Company 5

Update

Cancel

 search[illegible]

## SO No - 20001

Lead Name      Client 3

Quantity 5487

PO Number 001212

Status Done

Shipping Address 

☐ Courier - SelfPay  
☒ Courier - Customer

Description	Description 3
<p>1. <b>Introduction</b></p> <p>2. <b>Background</b></p> <p>3. <b>Methodology</b></p> <p>4. <b>Results</b></p> <p>5. <b>Discussion</b></p> <p>6. <b>Conclusion</b></p> <p>7. <b>References</b></p>	<p>1. <b>Introduction</b></p> <p>2. <b>Background</b></p> <p>3. <b>Methodology</b></p> <p>4. <b>Results</b></p> <p>5. <b>Discussion</b></p> <p>6. <b>Conclusion</b></p> <p>7. <b>References</b></p>

Date 10/04/2014

Approved By Person A  
Person B  
Person C

Comments	Items Packed - Ready for Delivery
----------	--------------------------------------

Billing Address 


Courier by DTDC ▼

Product	Product 3
---------	-----------

Company	Company 5
---------	-----------

Creat S I

Cancel

 search[illegible]

Close

search

[illegible]

Sale Order to be Approved (1)

[illegible]

Close

search

SO No	Lead	Descrip	product	Quantity	Date	Contact	Company	Status	Comment	Shipping	Billing	Courier By	Payment
<a href="#">SO000001</a>	Client3	Descrip	Driver 3	7000	18/04/201	Person3	Company	Done	Items	123 main	12343	DTDC	Self

Approval 1


Approval 2

Approval 3

SO No	Approved By	Date
SO000001	Approval 1	01/05/2014
SO000001	Approval 1	01/05/2014
SO000001	Approval 1	01/05/2014

Sale Order Summary

SO No - SO000001

Lead Name	Client 3	Quantity	<input type="text" value="5487"/>	PO Number	001212
Description	<input type="text" value="Description 3"/>	Date	<input type="text" value="10/04/2014"/> 	Approved By	Person A Person B Person C
Product Type	Product 3	Contact Person	<input type="text" value="Person 7"/>		
		Company	<input type="text" value="Company 5"/>		
Status	<input type="text" value="Done"/> ▼	Comments	<input type="text" value="Items Packed - Ready for Delivery"/>	<input type="button" value="Update"/>	<input type="button" value="Cancel"/>


 search

SO No	Approved By	Status	Comment



Sale Order Summary

SO No - SO000001

Lead Name	Client 3	Quantity	<input type="text" value="5487"/>	PO Number	001212
Description	<input type="text" value="Description 3"/>	Date	<input type="text" value="10/04/2014"/> 	Approved By	Person A Person B Person C
Product Type	Product 3	Contact Person	<input type="text" value="Person 7"/>		
Status	<input type="text" value="Done"/> ▼	Company	<input type="text" value="Company 5"/>	<input type="button" value="Update"/>	<input type="button" value="Cancel"/>
	Comments	<input type="text"/>			

 search

SO No	Approved By	Status	Comment
SO000001	None	Done	Items Packed Ready For Delivery

Sales Invoice

Invoice Number  Quantity

Company  PO Number

Address  Unit Price

Product  Applicable Tax

Create Invoice

Cancel

Invoice No	Company	Address	Product	Quantity	PDF
INV 00012	Company3	Address3	Product3	5487	<input type="button" value="p"/>
INV 00011	Company5	Address3	product4	8765	<input type="button" value="p"/>
INV 00010	Company5	Address3	product4	3265	<input type="button" value="p"/>
INV 00009	Company5	Address3	product4	65	<input type="button" value="p"/>

Samples

Sample Ref - S00001

Product Type

Drivers ▼

Luminous

Company

Company 5

Assigned to

Employee1

Lead Name

Client5 ▼

Client6

Contact Person

Person 7

Sample Price

10

Close

Work No

30001 ▼

Product

Driver5 ▼

Driver1

Others

Designation

CEO

No Samples

10

Specification

specifications

Date

10/04/2014

Mail Id

contact @client.com

Follow Up

10/04/2014

Ph/Mob No

2547878

Add Samples

Cancel

search

Samples Ref	Lead Name	Work No	Specifica	product	Quantity	Date	Contact	Designation	Mail ID	Ph/Mob No	Company	Assigned	Price	Sample Quantity	Follow up
S00001	Client1	30001	Specifica	Driver 1	5000	08/04/2	Person1	CEO	contact@cli	2547747	Company 1	Employee1	12	5	18/04/2014
S00002	Client2	30002	Specifica	Driver 2	5800	09/04/2	Person2	CEO	contact@cli	2478747	Company 2	Employee2	12	5	18/04/2014
S00003	Client3	30003	Specifica	Driver 3	7000	18/04/2	Person3	CEO	contact@cli	2544597	Company 3	Employee2	14	5	18/04/2014
S00004	Client4	30004	Specifica	Driver 4	6000	28/04/2	Person4	CEO	contact@cli	2544577	Company 4	employee2	10	5	18/04/2014

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete