

Masters Lead Management Oppurtunities Sale Order Sales Invoice

Oppurtunity Status Industry 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

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 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 00006

Primary Contact

Secondary Contact

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 ▼

Email client@client.com

Mail Id contact@client.com

Mail Id

Reference

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
00001	OEM	Client1	123 main st	client@client.com	2145141	Client Contact	CEO	contact@client.com	2547747	Employee1
00002	OEM	Client2	124 main st	client@client.com	2154141	Client Contact	CEO	contact@client.com	2347747	Employee2
00003	Class A	Client3	153 main st	client@client.com	2123141	Client Contact	CEO	contact@client.com	2556747	Employee3
00004	Class B	Client4	183 main st	client@client.com	2876141	Client Contact	CEO	contact@client.com	2589747	Employee4
00005	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

Close

[illegible]

Follow Ups for the Week (2)

[illegible]

Lead 00006

Industry

OEM

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

Referred By

Employee2

Follow Up Date



Reference

Distributor

☐ Create Oppurtunity☐ Add To Account

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		Industry
Name	<input type="text"/>	Contact Person	<input type="text"/>	<input type="text" value="OEM"/>
Address	<input type="text"/>	Designation	<input type="text"/>	<input type="text" value="Class A"/>
Email	<input type="text"/>	Mail Id	<input type="text"/>	<input type="text" value="Class B"/>
Contact No	<input type="text"/>	Ph/Mob No	<input type="text"/>	Referred By <input type="text" value="Employee2"/>
				Reference <input type="text" value="Distributor"/>
				<input type="checkbox"/> Add to Account
				<input type="button" value="Create Lead"/> <input type="button" value="Cancel"/>

Lead Summary

Account Summary

Lead Created!!!
Lead Created Sucessfully

Ok

search

Lead No	Name	Address	Contact Person	Designation	Mail Id	Ph/Mob No	Referred By
00001	Client1	123 main st	Client Contact	CEO	contact@client.co	2547747	Employee1
00002	Client2	124 main st	Client Contact	CEO	contact@client.co	2347747	Employee2
00003	Client3	153 main st	Client Contact	CEO	contact@client.co	2556747	Employee3
00004	Client4	183 main st	Client Contact	CEO	contact@client.co	2589747	Employee4
00005	Client5	963 main st	Client Contact	CEO	contact@client.co	2508747	Employee5
00006	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		Industry	OEM ▼
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"/>
				Referred By	Employee2 ▼
				Reference	Distributor ▼
				<input type="checkbox"/> Add to Account	
				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
00001	Client1	123 main st	client@client.c	2145141	Client Contact	CEO	contact@client.	2547747	Employee1
00002	Client2	124 main st	client@client.c	2154141	Client Contact	CEO	contact@client.	2347747	Employee2
00003	Client3	153 main st	client@client.c	2123141	Client Contact	CEO	contact@client.	2556747	Employee3
00004	Client4	183 main st	client@client.c	2876141	Client Contact	CEO	contact@client.	2589747	Employee4
00005	Client5	963 main st	client@client.c	2106541	Client Contact	CEO	contact@client.	2508747	Employee5
00006	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 - 30005

Primary Contact

Lead Information

Opportunity Management

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

Samples Management

search

Work No	Lead Name	Description	product	Quantity	Date	Contact	Designation	Mail ID	Ph/Mob No	Company
30001	Client1	Description1	Driver 1	5000	08/04/2014	Person1	CEO	contact@client.com	2547747	Company 1
30002	Client2	Description2	Driver 2	5800	09/04/2014	Person2	CEO	contact@client.com	2478747	Company 2
30003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.com	2544597	Company 3
30004	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 - 30005

Primary Contact

Lead Information

Opportunity Management

Lead Name Client5

Product

Contact Person

Company

Description	Description 5
<p>1. The first step in the process is to identify the problem or issue that needs to be addressed. This involves gathering information and understanding the context of the problem.</p> <p>2. Once the problem is identified, the next step is to define the objectives and goals of the project. This helps to clarify what needs to be achieved and provides a clear direction for the team.</p> <p>3. The third step is to develop a plan or strategy to address the problem. This involves breaking down the problem into smaller, manageable tasks and determining the resources needed to complete each task.</p> <p>4. The fourth step is to implement the plan. This involves putting the strategy into action and monitoring progress to ensure that the project is on track.</p> <p>5. The final step is to evaluate the results of the project. This involves assessing the outcomes against the objectives and goals and identifying any areas for improvement.</p>	<p>1. The first step in the process is to identify the problem or issue that needs to be addressed. This involves gathering information and understanding the context of the problem.</p> <p>2. Once the problem is identified, the next step is to define the objectives and goals of the project. This helps to clarify what needs to be achieved and provides a clear direction for the team.</p> <p>3. The third step is to develop a plan or strategy to address the problem. This involves breaking down the problem into smaller, manageable tasks and determining the resources needed to complete each task.</p> <p>4. The fourth step is to implement the plan. This involves putting the strategy into action and monitoring progress to ensure that the project is on track.</p> <p>5. The final step is to evaluate the results of the project. This involves assessing the outcomes against the objectives and goals and identifying any areas for improvement.</p>

Others

Designation

Quantity

Product

Date _____

Created Successfully!!

Oppurtunity created
suceessfully!!

Create Opportunity

Cancel

Ok

 search[illegible]

Edit

Delete

Edit

Delete

Edit

Delete

Edit

Delete

Oppurtunity

Primary Contact

Lead 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
30001	Client1	Description1	Driver 1	5000	08/04/2014	Person1	CEO	contact@client.com	2547747	Company 1
30002	Client2	Description2	Driver 2	5800	09/04/2014	Person2	CEO	contact@client.com	2478747	Company 2
30003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.com	2544597	Company 3
30004	Client4	Description4	Driver 4	6000	28/04/2014	Person4	CEO	contact@client.com	2544577	Company 4
30005	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
30001	Client1	Description1	Driver 1	5000	08/04/2014	Person1	CEO	contact@client.co	2547747	Company 1	Proposal
30002	Client2	Description2	Driver 2	5800	09/04/2014	Person2	CEO	contact@client.co	2478747	Company 2	Negotiation
30003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.co	2544597	Company 3	Final Review
30004	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
30004	Client4	Description4	Driver 4	6000	28/04/2014	Person4	CEO	contact@client.co	2544577	Company 4	Analysis

Edit

Close

Oppurtunity

Work No - 30004

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

Project Amount

2,00,00

Update

Cancel

Product Category

Drivers

Company

Company 4

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 - 30004

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 - 30003

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 - 30003

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
30001	Client1	Description1	Driver 1	5000	08/04/2014	Person1	CEO	contact@client.co	2547747	Company 1	Proposal
30002	Client2	Description2	Driver 2	5800	09/04/2014	Person2	CEO	contact@client.co	2478747	Company 2	Negotiation
30003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.co	2544597	Company 3	Closed/Won
30004	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
30003	Client3	Description3	Driver 3	7000	18/04/2014	Person3	CEO	contact@client.co	2544597	Company 3	Closed/Won

SO

SO No - 20002

Lead Name

Quantity

PO Number

Status

In Progress



Shipping Address

□

☐

Courier - SelfPay

☒

Courier - Customer

Description

Date _____

10/04/2014



Approved By

Person A

Comment

10/10/2019

Billing Address

Courier by

DTDC

Product Category

Contact Person

Box 1

Company

10/10

Product

Create SO

Cancel

 search[illegible]

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 - 20001

Lead Name Client 3

Quantity

5487

PO Number 001212

Status	Done
--------	------

Shipping Address



Courier - SelfPay



Courier - Customer

Description

Description 3

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

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

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"/>

search

Edit Delete