

[My Pending Task](#)[Ex & AR Dashboard](#)[My Account](#)[ORG Chart](#)

Welcome Rohan

[Logout](#)[HR Management](#)[Master List](#)[Lead Management](#)[Travel Management](#)[IT Ticketing](#)[Expenses](#)[More ...](#)

- Lead Management
 - Lead Generation
 - Lead Validation
 - Lead Assignment
 - Lead Escalation
 - Lead Conversion
- Prospects
- Accounts
- Opportunities

[Lead Management/](#) Create New Lead

Create New Lead

Customer Details

Customer Type * <input type="radio"/> New <input checked="" type="radio"/> Existing Customer		Multiple Site Audit * <input checked="" type="radio"/> Yes <input type="radio"/> No	
Associated Comapany *	BR Number		
<input type="text" value="TCS Pvt Ltd (P)"/>	<input type="text" value="50001234"/>		
Do you want to Create New Location/Site - 50001234 * <input checked="" type="radio"/> Yes <input type="radio"/> No			
Associated Comapany *	Segment *	Certificate Type *	
<input type="text" value="TCS Pvt Ltd (S1)"/>	<input type="text" value="MSA"/> <div>MSA MED</div>	<input type="text" value="Cert"/> <div>Cert Non-Cert</div>	<input type="text" value="BU"/> <input type="text" value="COE"/>
First Name *	Last Name *	Email *	Job Title *
<input type="text" value="Sachin P"/>	<input type="text" value="P"/>	<input type="text" value="Sachin@gmail.com"/>	<input type="text" value="Finance & Accounts"/>
Street Address *		Address Line 2 *	
<input type="text" value="Anjaneya Tech Park"/>		<input type="text" value="5th Floor, Domalur"/>	
City *	State *	Country *	Postal Code *
<input type="text" value="Bangalore"/>	<input type="text" value="Karnataka"/>	<input type="text" value="India"/>	<input type="text" value="560096"/>
Region *	Regional Business Head *	Global Managing Director *	Global Manager Sales *
<input type="text" value="South -1"/>	<input type="text" value="Girish Siswal"/>	<input type="text" value="Dr.Murugan"/>	<input type="text" value="Girish Siswal"/>
Website URL *	Phone number	Mobile Phone number *	
<input type="text" value="www.dqs.com"/>	<input type="text" value="08485285277"/>	<input type="text" value="8778784654"/>	<input type="text" value="employee count"/>

Lead Source Details

DQS Contact Source *	Lead Created By *	Lead Created Date *
<input type="text" value="Cold Calling"/>	<input type="text" value="Rohan"/>	<input type="text" value="21-11-2022"/>

Requirement Details

Categories	Standard/Program/Assement *	Remarks *
<input type="text" value="Sole proprietorship"/> <div>Partnership</div>	<input type="text" value="ISO 9000 Standard."/>	<input type="text" value="Proceed further."/>

[Create Lead](#)[Cancel](#)

MED >> NO
CATEGORY
MSA>> CATEGORY

Lead Management

Lead Generation

Lead Validation

Lead Assignment

Lead Escalation

Lead Conversion

Prospects

Accounts











Opportunities

CERT CAN BE
NONCERT VICE
VERSA

Lead Management/ Assigned Lead List

Opportunity List

No .of items 5

Sl.No	Lead Number	BR Number	Segment	Certification Type	Associated Comapany	Associated Contact Person	DQS Contact Source	Product Name	Lead Created By	Lead Created Date	State/Region	Region	Status	Action
1	L123	50001234	MSA	Cert	TCS Pvt Ltd (P)	Ravi Ratnakar	Cold Calling	ISO 9K	Sachin P	25-11-2022	Banaglore	South - 1	Account	 
2	L128	50001234	MSA	Non - Cert	TCS Pvt Ltd (P)	Thilothaman	Channel Partner	ISO 14K-2015	Sachin P	22-11-2022	Coimbatore	South - 1	Account	 
3	L12	50001234	MSA	Cert	TCS Pvt Ltd (P)	Roshni D	Social Campaign	ISO 9K	Sachin P	21-11-2022	Bangalore	South - 1	Opportunity	 
4	L111	50001234	MSA	Cert	TCS Pvt Ltd (P)	Kajal S	Recomendation Consultancy (Channel Partner)	ISO 14K	Sachin P	16-11-2022	Chennai	South - 1	Opportunity	 
5	L115	50001236	MSA	Non - Cert	TCS Pvt Ltd (S2)	Hemanth P	DQS Customer Referal	ISO 27K	Sachin P	15-11-2022	Mysore	South - 1	Account	 

[Create Opportunity View](#)[Edit View](#)[Multi site Representation](#)

Show 10 Entries

Previous  3  Next

No need to change action button in the listing of ERP

DIGITAL SIGNED DOCUMENTS

Customer Details

Customer Type* ☒ New ☐ Existing Customer

Associated Comapany*
TCS Pvt Ltd

Business unit*
Business unit

COE*
COE

Segment*
MSA
MED

Certificate Type*
Cert
Cert
Non-Cert

First Name*
Sachin P

Last Name*

Email*
Sachin@gmail.com

Job Title*
Finance & Accounts

Street Address*
Anjaneya Tech Park

Address Line 2*
5th Floor, Domalur

City*
Bangalore

State*
Karnataka

Country*
India

Postal Code*
560096

Region*
South -1

Regional Business Head*
Girish Siswal

Global Managing Director*
Dr.Murugan

Global Manager Sales*
Girish Siswal

Website URL
www.dqs.com

Phone number
08485285277

Mobile Phone number*
8778784654

Employee count*

Lead Source Details

DQS Contact Source*
Cold Calling

Lead Created By*
Rohan G

Lead Created Date*
21-11-2022

Requirement Details

Standard/Program/Assement*
ISO 9000 Standard.

Remarks*
Proceed further.

Lead Validation

Remarks*
All Information are clear.

Validated By*
Lead Admin

Lead Validated Date*
21-11-2022

Company Additional Details

Industry Sector*
IT industry

Customer Category*
Pvt Ltd

Employee Count*
25

Customer Sales Executive*
Anisha F

Assign Opportunity to*
CMT-Connect

Opportunity Type*
Certification -New Audit RA

Opportunity Ref. No.*
O1234

Product Request*
ISO 9000, ISO 14000, ISO 27000

GST Applicable
GST Registered

GST Number
29AZOPK5661D1ZC

Documents Rerquired

Contract Review Form*
CRF 1.pdf

View

Basic Form*
Form.pdf

View

GST File*
GST.pdf

View

Company Logo File
Logo.pdf

View

Others*
PAN.pdf

+

View

Remarks*
Fine to Proceed Further.

Note: Final files can be uploaded by only Connect team. If sales person uploaded files then Connect team able to view/download/edit and then Re-upload.

Note: Connect team can send for approval/Convert opportunity.

VIEW PRICE DETAILS

Quotation Currency*
INR

Price Per Mandays
18,000.00
Default Price reflection depends on product selection & No.of mandays

Expense Category*
Billable
Billable
Non Billable

Comapny Logo Required*
☒ Yes ☐ No

Company Logo Cost
5,000.00

Quote Prepared*
Sashi D
Default Login person

Quote Prepared Date*
22-11-2022
Default Current date

Send Quote Cancel

Quote shared to SP in Pdf format , With given inputs and Attach required document

ADDITIONAL DOCUMENTS

UPLOAD DIGITAL SIGNED DOCUMENTS

ADD MORE DOCUMENTS



DOCUMENT NAME	UPLOAD DOCUMENTS				
DATA RELATION FILE	CHOOSE FILE	UPLOAD	VIEW	DOWNLOAD	
EXTENERLA FILE	CHOOSE FILE	UPLOAD	VIEW	DOWNLOAD	

S and M Head approvalSALES SUPPORT TEAMUPLOAD SIGNED DOCUMENTS

In digital signed document, sales support team (if required to redirect to Sales and Marketing head they can)

No documentsMandatory sales and marketing head approval