

Lead Management System - Help

Login Screen:

Lead Management Software | V2 - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://dealers.relyonsoft.com/index.php

Most Visited Getting Started Latest Headlines

Lead Management Software | V2

Relyon Softech Ltd Lead Management Software

M S Relyon Dealer Zone || Gateway to Leads, Billing, and other Advanced Services.

Login

Please enter your login details to proceed.

Login Name:

Password:

Login Clear

[Retrive your Password](#)

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Login to www.relyonsoft.com → Dealer Zone with your user ID & PW.

If you have forget your password, click on Retrieve your Password & enter your Login Name & your email ID (Login Name & Email ID will be your Relyon Email ID) click on send Details, password will be sent to your Relyon Email ID.

LMS | Get Password - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://dealers.relyonsoft.com/password.php

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LMS | Get Password

Relyon Softech Ltd Lead Management Software

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Get Password for your username

Password retrival tool

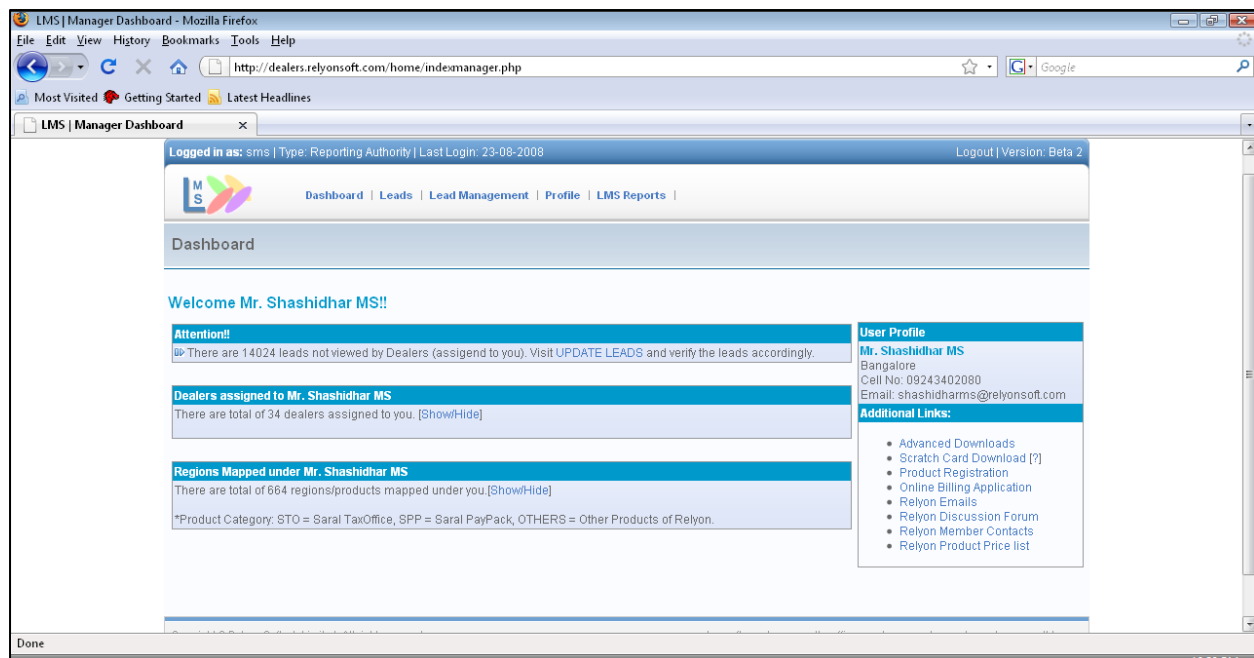
Login Name:

Your email:

Send Details Clear

[Back to Login page](#)

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Dashboard:

In dashboard you can see the below mentioned details

1. **Dealers assigned:** By clicking on Show/Hide, Manager can view the dealers assigned with full details.
2. **Regions Mapped under:** Click Show/Hide, Manager can view the regions mapped under him with dealer name of the region.
3. **User Profile:** Name, Mobile & Email ID which dealer assigned under you can view this information.
4. **Additional Links:**
 1. **Advanced Downloads:** You can download Relyon setups, updates, templates and marketing materials from here.
 2. **Scratch Card Download (click in [?] for help):** Buy Relyon Scratch Cards – Online
 3. **Product Registration:** Relyon Product can be registered to customer from here
 4. **Online Billing Application:** You can raise the Bill directly to end user
 5. **Relyon Emails:** Login to Relyon Webmail Account directly from here.
 6. **Relyon Discussion Forum:** Open discussion forum of Relyon, where anyone can come and share their views/discuss about Relyon Products.
 7. **Price List of Relyon Products:**
 8. **CSD Member Full contact details:**

Leads:

Manual Uploads of Lead: Here you can upload the leads generated by you or any leads coming directly you. Once after a lead has been uploaded by you, that customer will be locked to you. Enter all the details & click on Add Leads to save the lead. Click on New to upload new lead.

LMS | Upload Leads - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://dealers.relyonsoft.com/leads/uploadlead.php

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LMS | Upload Leads

Upload Leads

Provide the new Lead detail:

Company Name: Contact person:

Address:

State: District:

Region: Place:

Phone: Email ID:

Product Name: Reference:

To Dealer: Remarks:

New Add Lead >>

Transfer Lead: Here Lead can be transferred from one dealer to other dealer assigned under the manager. Select a lead by using filter option & select the dealer to transfer & click on update. The lead will be transferred to the selected dealer.

LMS | Lead Transfer - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://dealers.relyonsoft.com/leads/transferlead.php

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LMS | Lead Transfer

Transfer Lead

Change the dealer for a lead

Lead Information: Product:

Transfer lead:

From Dealer: To Dealer:

*Changing the Dealer will remove the Dealer member assigned to that lead, if any.

Update

Filter:

Search:

Search For:

☒ Lead ID ☐ Company ☐ Contact Person ☐ Phone ☐ Email ☐ District ☐ State

☐ Product Name ☐ Dealer Name ☐ Manager Name

List of leads: => [Leads of Last 2 Days (16 Records)]

Lead Management:

Update Lead

Lead Contact Card

Company [Id]: nitin agrawal [40167]
Contact person: Nitin Agrawal
Address: aam parow
District / State: Garhwal(Pauri) / UTTARANCHAL
Phone: 9997064060
Email ID: nitinnitinagraval@yahoo.co.in
Reference [Type]: NSDLIncome Tax website [Product Download]
Date of lead: 22-08-2008
Dealer viewed date: Not yet viewed
Product: Saral IncomeTax
Dealer: Relyon Softech Ltd (CSD)
Dealer Member: None
Manager: Mr. Shashidhar MS

Lead Tracker : [Follow Up]

Remarks :

Next Followup Date :

| Sl No | Date | Remarks | Next Follow-up | Entered by |
|-------|------------|-----------------------|----------------|---------------|
| 1 | 22-08-2008 | Not picking the call. | 22-08-2008 | Archana D [S] |

Lead Status

Last Updated by: Archana D [S]
Last Updated date: 22-08-2008

Initial Remarks : Not Available
Current Status :

Update Lead: Here all the leads can be viewed & can be updated.

1. **Lead Contact Card:** Here all the details of selected lead can be viewed.
2. **Lead Tracker [Follow Up]:** Here remarks of a lead & next follow up date can be entered.
3. **Lead Status:** Here current lead status can be updated.
4. **Filter [Show/Hide]:** click on Show/Hide to view the filter option. Here lead can be filtered & view by date wise, product wise, Status of lead wise, follow up date wise & Given by.
5. **List of Leads:** By default only last 2days leads will be appeared here. To view all the leads, use filter option.

Profile

Logged in as: sms | Type: Reporting Authority | Last Login: 23-08-2008 Logout | Version: Beta 2

Dashboard | Leads | Lead Management | Profile | LMS Reports |

Change Password

Provide the details to change the Password:

Old Password :

New Password :

Confirm Password :

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Changes Password: Here user can change his login password.

LMS Reports

Dashboard | Masters | Leads | Lead Management | Profile | LMS Reports |

Lead Report

Filter the data for Report:

From Date : To Date :

Product Name : Dealer Name :

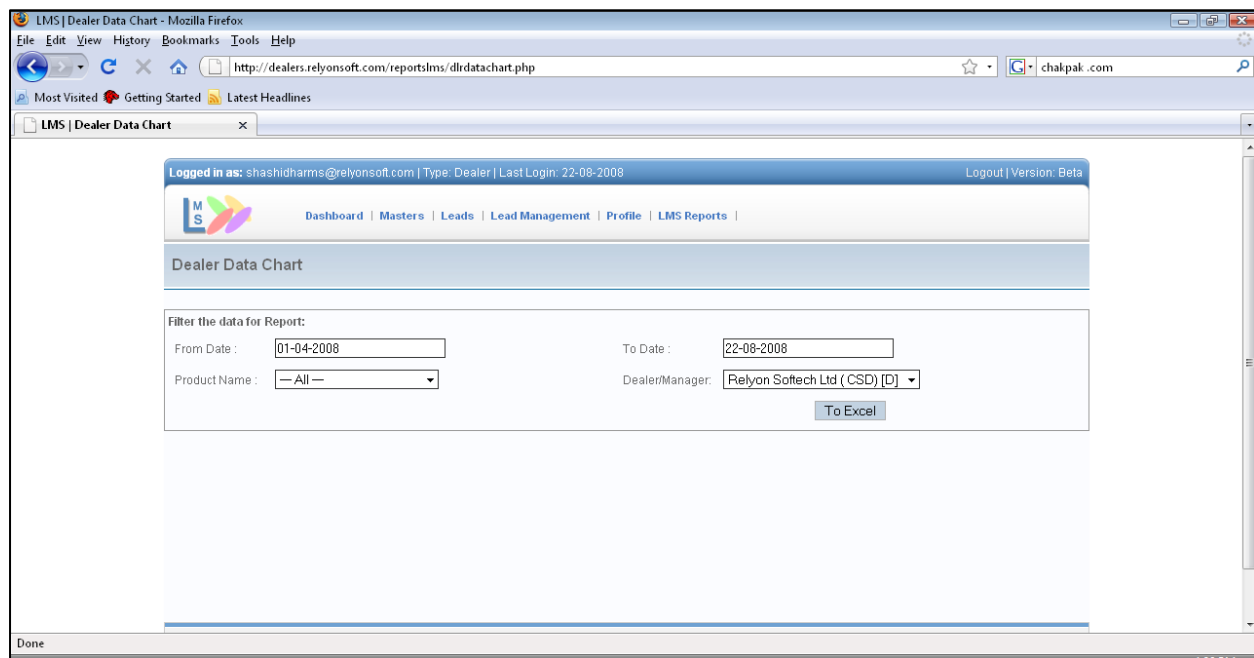
Given By : Status of Lead :

Follow-up Date : Optional

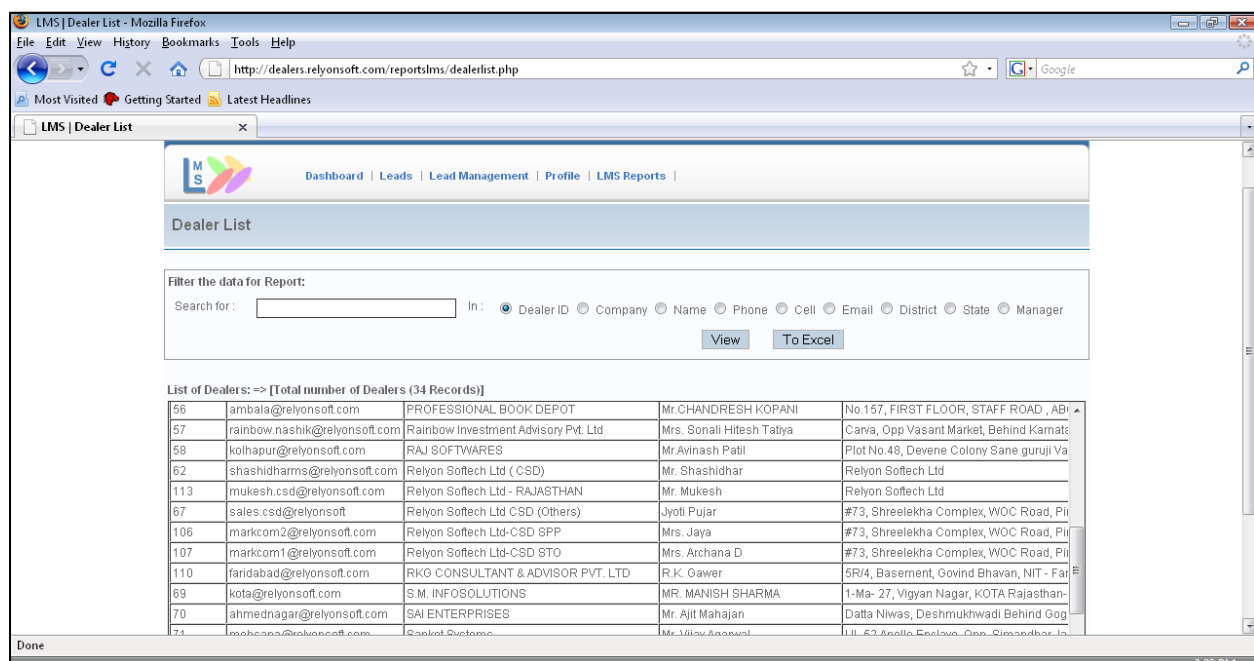
List of leads: => [Leads of Last 2 Days (5 Records)]

| Lead ID | Lead Date | Product | Company | Contact | Phone | Email ID | District | State | Dealer |
|---------|------------|---------------------|---------|---------------|-------------|------------------------------|----------------|------------------|---------------|
| 40167 | 2008-08-22 | Saral IncomeTax | Planet | Nitin Agrawal | 9997064060 | nitinnitinagrwal@yahoo.co.in | Garhwal(Pauri) | UTTARANCHAL | Relyon Softec |
| 40107 | 2008-08-21 | Saral TaxOffice | Planet | Arun | 09817403518 | arunhrit@gmail.com | Shimla | HIMACHAL PRADESH | Relyon Softec |
| 40105 | 2008-08-21 | Saral TDS Corporate | Planet | Arun | 09817403518 | arunhrit@gmail.com | Shimla | HIMACHAL PRADESH | Relyon Softec |
| 40104 | 2008-08-21 | Saral IncomeTax | Planet | Arun | 09817403518 | arunhrit@gmail.com | Shimla | HIMACHAL PRADESH | Relyon Softec |
| 40103 | 2008-08-21 | Saral PayPack | Planet | Arun | 09817403518 | arunhrit@gmail.com | Shimla | HIMACHAL PRADESH | Relyon Softec |

Lead Report: By using the filter option leads can be viewed & can be exported to Excel.



Dealer Data Chart: Here excel report can be taken status wise.



Dealer List: Full details of Dealer can be taken in Excel.

Contact Information for LMS

| | |
|--|---|
| Manage & sales Contact person : Mr. Shashidhar MS Email: shashidharm@relyonsoft.com Mobile: 09243402080 Phone: 080-23191215 | For SPP Leads Contact person : Mrs. Jaya Email: markcom2@relyonsoft.com Mobile: 09243480524 Phone: 080-23191215 |
| For STO Leads Contact person : Mrs. Archana Email: markcom1@relyonsoft.com Mobile: 09243480526 Phone: 080-23191215 | For TDS & Others Leads Contact person : Mrs. Jyoti Pujar Email: sales.csd@relyonsoft.com Mobile: 09243480412 Phone: 080-23191215 |
| For support & Technical Contact person : Mr. Sunil Prasad Email: sunil.csd@relyonsoft.com Phone: 080-23191215 | |