

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

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

Most Visited Getting Started Latest Headlines

LMS | Get Password

Relyon Softech Ltd Lead Management Software

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

Get Password for your username

Password retrival tool

Login Name:

Your email:

Send Details Clear

[Back to Login page](#)

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Dashboard:

Logged in as: shashidharm@relyonsoft.com | **Type:** Dealer | **Last Login:** 04-07-2008 **Logout | Version:** Beta

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

Welcome Relyon Softech Ltd (CSD)!!

Attention!!
There are 516 leads not viewed by you. Visit **UPDATE LEADS** and update the leads accordingly.

Your data chart: Today

	Not Viewed	UnAttended	Fake Enquiry	Not Interested	Registered User	Attended	Demo Given	Quote Sent	Penusing to Purchase	Order Closed
Saral PayPack	0	0	0	0	0	0	0	0	0	0
Saral TaxOffice	1	1	0	0	0	0	0	0	0	0
SaralTDS/ Others	0	0	0	0	0	0	0	0	0	0

Regions Mapped under Relyon Softech Ltd (CSD)
There are total of 153 regions/products mapped under you.[Show/Hide]
*Product Category: STO = Saral TaxOffice, SPP = Saral PayPack, OTHERS = Other Products of Relyon.

User Profile
Mr. Shashidhar
Relyon Softech Ltd (CSD)
Relyon Softech Ltd
Bangalore Urban, KARNATAKA
Cell: 9243402080
Phone: 080-23191215
Email: shashidharm@relyonsoft.com

Reporting Authority:
Mr. Shashidhar MS
Bangalore
Cell No: 09243402080
Email: shashidharm@relyonsoft.com

Additional Links:

- Advanced Downloads
- Scratch Card Download [?]
- Product Registration
- Online Billing Application
- Relyon Emails

In dashboard you can see the below mentioned details

1. **Your data chart:** Summary for the Leads, Day wise, Month wise & all leads till date.
2. **Regions Mapped under user:** Click Show/Hide to see regions mapped under you.
3. **User Profile:** Company name, contact person, mobile ect...
4. **Reporting Authority profile:**
5. **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:**

Master

LMS | Dealer Member Master - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://dealers.relyonsoft.com/master/dealermember.php

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LMS | Dealer Member Master

Logged in as: shashidharm@relyonsoft.com | Type: Dealer | Last Login: 22-08-2008 Logout | Version: Beta

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

Dealer Members

Add / Update a Member for Relyon Softech Ltd (CSD):

Name: Remarks:

Email ID: Phone/Mobile:

Username: Password:

New Save Delete

Dealer Member Register:

ID	Name	Email ID	Phone/Mobile	Remarks
----	------	----------	--------------	---------

Done

Dealer Members: Here you can create login ID & password for your employee working under you. And you manage the member 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

Most Visited Getting Started Latest Headlines

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 >>

Done

Assign Leads to Dealer Members: Here you can see all the leads assigned to you & uploaded by you. Lead can be assigned to the created members.

Assign Leads to Dealer Members

Assign/Change the dealer member for a lead

Lead Information: -Select a lead-

Product: -Select a lead-

Assign lead:

From Dealer Member: -Select a lead-

To Dealer Member: None

Update

Filter:

Search:

From: ☒ Web Downloads ☐ Manual uploads ☐ Both

Search For: ☒ Lead ID ☐ Company ☐ Contact Person ☐ Phone ☐ Email ☐ District ☐ State ☐ Product

List of leads: => [Leads of Last 2 Days (36 Records)]

Lead ID	Lead Date	Product	Company	Contact	Phone	Email ID
40167	22-08-2008	Saral IncomeTax	nitin.agrawal	Nitin Agrawal	9997064060	nitinnitinaagra

Steps to assign leads to member:

1. Select a lead from List of Leads (By default leads will be showing of last 2 days or lead can be searched form Filter option)
2. After selecting a lead, all the details will appear.
3. Select the member from “To Dealer Member” & click on update. The lead will be assigned.

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: nitinnitinagrwal@yahoo.co.in
Reference [Type]: NSDUIncome 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

The screenshot shows a web browser window titled 'LMS | Edit Profile - Mozilla Firefox'. The address bar displays 'http://dealers.relyonsoft.com/profile/dealerprofile.php'. The page has a navigation bar with links: Dashboard | Masters | Leads | Lead Management | Profile | LMS Reports. The main heading is 'Edit Profile'. Below it, a message states: 'Following details are allowed to update:'. The form contains the following fields: Company Name (Relyon Softech Ltd (CSD)), Contact person (Mr. Shashidhar), Address (Relyon Softech Ltd), District (Bangalore Urban), State (KARNATAKA), Phone (080-23191215), Mobile (9243402080), Email (shashidharm@relyonsoft.com), and Website (empty). There are 'Update' and 'Reset Form' buttons at the bottom right. The footer includes copyright information for Relyon Softech Limited and several website URLs.

Edit Profile: Here user can change his profile, Contact person, Address, Phone, Mobile & website can be changed.

Note: Any change done here will effect in www.relyonsoft.com. Any customer downloads a product in your region this address will be sent to him.

The screenshot shows a web browser window titled 'LMS | Change Password - Mozilla Firefox'. The address bar displays 'http://dealers.relyonsoft.com/profile/password.php'. The page has a navigation bar with links: Dashboard | Masters | Leads | Lead Management | Profile | LMS Reports. The main heading is 'Change Password'. Below it, a message states: 'Provide the details to change the Password:'. The form contains the following fields: Old Password, New Password, and Confirm Password. There are 'Change' and 'Reset Form' buttons at the bottom right. The footer includes copyright information for Relyon Softech Limited and several website URLs.

Changes Password: Here user can change his login password.

LMS Reports

Filter the data for Report:

From Date : 01-04-2008 To Date : 22-08-2008

Product Name : -- All -- Dealer Name : Relyon Softech Ltd (CSD)

Given By : All Status of Lead : -- All --

Follow-up Date : Optional

View To Excel

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	nitin agrawal	Nitin Agrawal	9997064060	nitinnitinagrawal@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.

Logged in as: shashidharm@relyonsoft.com | Type: Dealer | Last Login: 22-08-2008 Logout | Version: Beta

Filter the data for Report:

From Date : 01-04-2008 To Date : 22-08-2008

Product Name : -- All -- Dealer/Manager : Relyon Softech Ltd (CSD) [D]

To Excel

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

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	