

Ranksnet CRM Upgradation Development

Feedback 1	
S.N.	Section
1	Webform Source Code
2	Webform Source Code
3	Dashboard
4	Leadform
5	Leadmgt
6	Leadmgt
7	Leadmgt
8	Leadmgt
9	Leadmgt
10	Leadmgt
11	Leadmgt
12	Leadmgt
13	Notification
14	Notification
15	Notification

Feedbacks

Submission Date: 15.01.2024

Details

Add proper captcha in the webform raw code to prevent "SPAM" entry.

[After successful from submission, redirect the visitor to this link-
https://www.ranksnetbd.com/successful/](https://www.ranksnetbd.com/successful/)

Show a widget that present total number of leads in lifetime and number of leads in each lead status.

Remove or hide all field that are not mentioned in requirement PPT.

Add following filter fields-

1. Created by,
2. District,
3. Area,
4. Reasoning,
5. Package,
6. Source,
7. CON ID,
8. Referrer ID,
9. Promo Code.

Show a panel that present total number of leads received in last 30 days and number of leads in each lead status .

Show the following data in each lead row- Create date, Last Modified date, Name, Phone number, Email, District, Area, Street Address, GPS, Source, Package, Promo Code, Referral, Fiber (M), Survey Details, POP Location, Lead status, Reasoning, Reminder, Last Remarks.

Remove or hide all field from "details" section that are not mentioned in requirement PPT on the lead mgt section.

Bring all editable data in a single page for each lead (as per shown in requirement ppt) **so that the user doesn't need to browse multiple section to edit or input data.**

Show new leads only to the Sales & Marketing Team/Coordinator.

Show and continue showing leads to "Survey Co-ordinator" when a leads is saved under survey status.

Add/Show "Export" option.

For each lead entry through webform or leadform, send a notification to Sales Coordinator-Saddam

When a lead is saved under "Survey Status", send a notification to Survey Coordinator-Milton.

For each lead modification, send a notification to "Sales Co-ordinator".

Possible
Possible
Possible
Possible
Possible for all fields except CONID is the commercial step after lead. And it will be generated after converting from lead to sales order. And due to this structure these CONID will not be available in Lead module but in the customer/branch module.
Possible
Possible
Possible
No Possible due to crm framework structure
Possible
Possible
Possible
Need - Email Address