Feature’s List

1 Leads category (admin should able to see overall leads)

* New leads-66
* Hot lead - 23
* Warm lead-41
* Cold lead- 33
* Cold Data

2 Sales Category

* Full payment
* Client name
* Contact number
* Alternate number
* Email address
* Amount paid
* Payment mode
* Date
* Agreement number
* Lead ID
* Part payment
* Client name
* Contact number
* Alternate number
* Email address
* Amount paid
* Payment mode
* 1st payment date and second payment date with amounts
* Stage wise payment
* Client name
* Contact number
* Alternate number
* Email address
* Amount paid
* Payment mode
* 1st 2nd and 3rd payments date with amounts

3 Meetings category

* Meetings fixed – 10 minus 1
* Zoom-4 minus 1
* Office-6
* Meetings done 1
* Zoom-1
* Office
* Walk-in

4 Adding New Lead

* Name
* Contact number
* Alternation number
* Email address
* Nationality
* Location
* Marital status
* Spouse Name
* Contact number
* Email Address
* Date of birth
* Education
* Experience
* Total kids
* Date of birth
* Relative
* Uncle
* Aunty
* Sibiling
* Source
* Google
* WhatsApp
* Facebook
* Instagram
* Naukri
* Job Posting
* Reference
* Walk-in
* others

5 User Level Feature’s

* Master admin – CEO Level
* Super admin – Regional Manager Level
* Admin- Branch Manager Level
* Consultant – Basic Consultant Level

6 Extra Feature’s

* Break timer
* Login hour’s
* Contract Download Feature
* Leave Request form
* Calendar to show monthly fixed meetings
* Daily Meetings on dashboard
* Notify every time new lead is added
* Lead Transfer only with master admin and super admin
* Option to create reminder or task and notify on set date
* Reflect due payment of client on dashboard on particular day

User designation in Employee

Finance Report ( Expenses Entry )

Reports:

Search by Source

Meting reports