

CEZCON CRM Your Business Advisor

Dashboard Task 72 Marketing Lead Account Sales Purchase Report Settings

Today 11 Progress 3 Overtime 1 Upcoming 4 Completed 120 Meeting

Sort By All Task
Assignee All Owners
Task Type All
Created By All

Task Today

Show 10 Rows Search Task

Call - Tele Sales (3)		Meeting (2)	Site Visit (2)	Document Collect (1)		
Designing (1)		Printing (1)	Sales Visit (1)			
SL.No	Assignee	Task Details	Task Under	Task Type	Due Time	Priority
1		Call to get an appointment	Mr. Nimmy	Call - Tele Sales	Low	Pending
2		Call	Dr. Prasad	Call - Tele Sales	Low	Pending
3		Call	Visa/Rea Hospital Rea Hospital	Call - Tele Sales	Low	Pending
4		Meeting	Visa/Rea Hospital Rea Hospital	Meeting	Low	Pending
5		They want to Collect Document	SkyFly Travel and Toursam	Document Collect	Mid	Pending

Assign Task **→ TASK** **← TASK**

- Generic
- Lead
- Account
- Opportunity
- Contact
- Campaign
- Invoice

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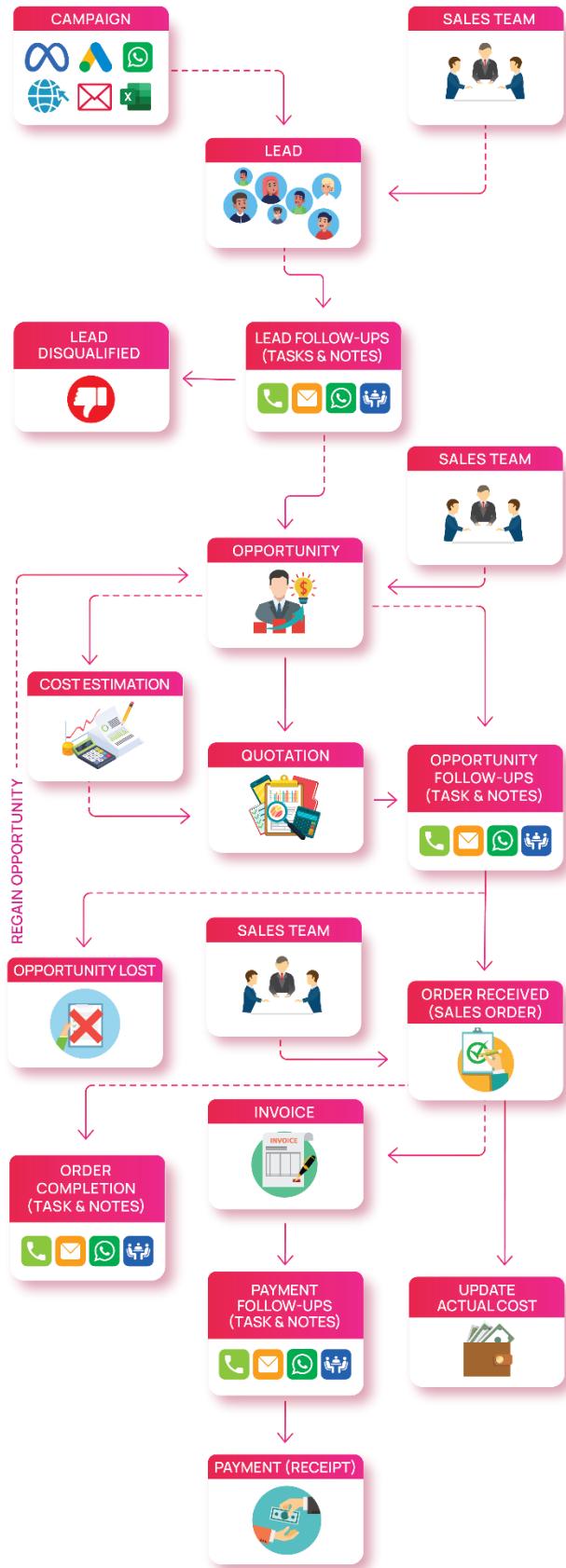
Dashboard Task 72 Marketing Lead Account Sales Purchase Report Settings

Add Generic Task

Assignee Amjad
Type Select Type
Task Details
Due Date
Location Search location

Participants None selected
Priority Low Mid High
Status Pending
Attachment Choose File No file chosen
Comments

Close **Submit**



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Dashboard Task Marketing Lead Account Sales Purchase Report Settings

Sale Target 0.00 **Collection Target** 0.00

Pipeline & Activity

- Hot Leads: 0
- Task Pending Today: 0
- Task Expired: 0

Overview

Target Profit(GP) 0.00 <small>Total Sale: 0.00</small>	Target Invoice 0.00 <small>Total Profit(GP): 0.00</small>
Sale 0.00 <small>Average Sale</small>	Lead 0 <small>0% Reached</small>

Monthly Plan

Required Average Sales Day: 0.00
Number of Sale Conversion Required: 0
Number of Opportunity Required: 0
Conversion Ratio: 0.00%
Sales From Existing Customer: 0.00
User Expenses: 0.00
Collection: 0.00

Your Recent Performance

Sale

Opportunity

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Dashboard Task Marketing Lead Account Sales Purchase Report Settings

Company Overview (This Month)

- 800 K** (Target)
- 128.64 K** (Achieved)
- 12.88 M** (Pipeline)

User Overview (This Month)

- 0.00** (Target in this month)
- 0.00** (Achieved in this month)
- 0.00** (Pipeline)

Company Sale

User Sale

Opportunity Closed Lost (User)

Opportunity Closed Lost (Company)

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Dashboard Task Marketing Lead Account Sales Purchase Report Settings

Opportunity

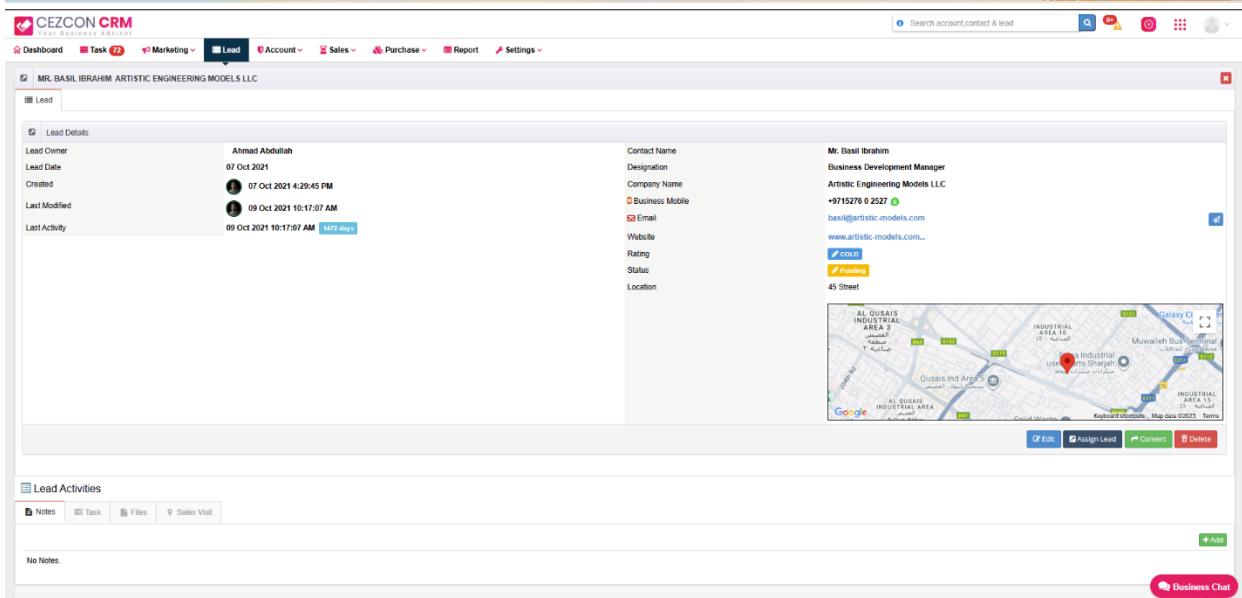
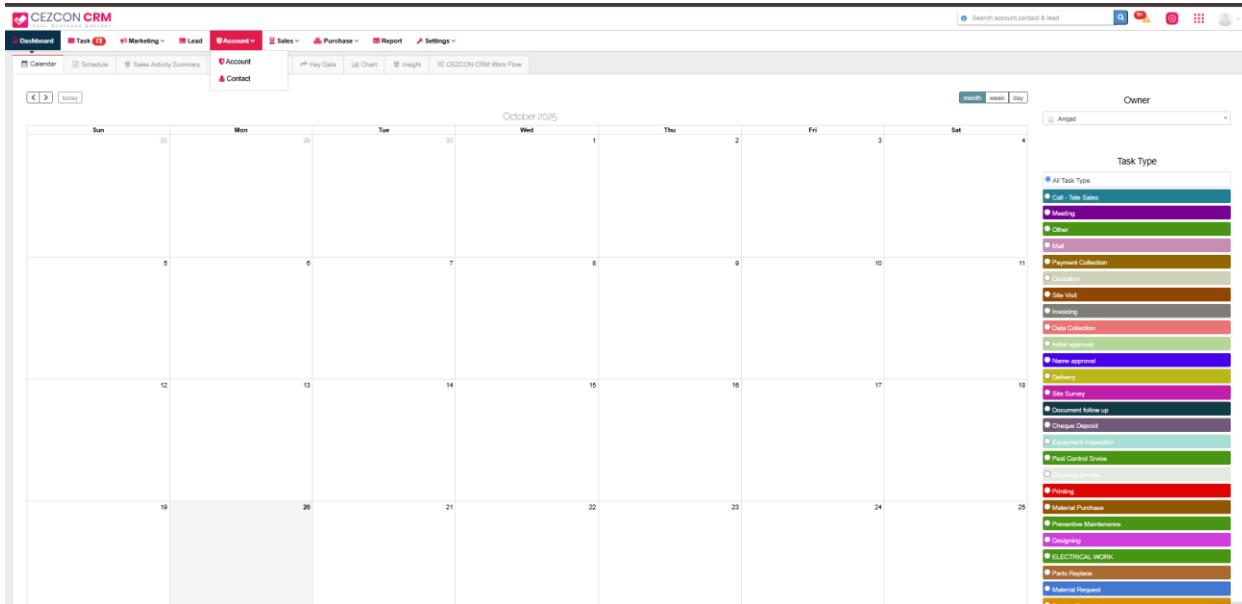
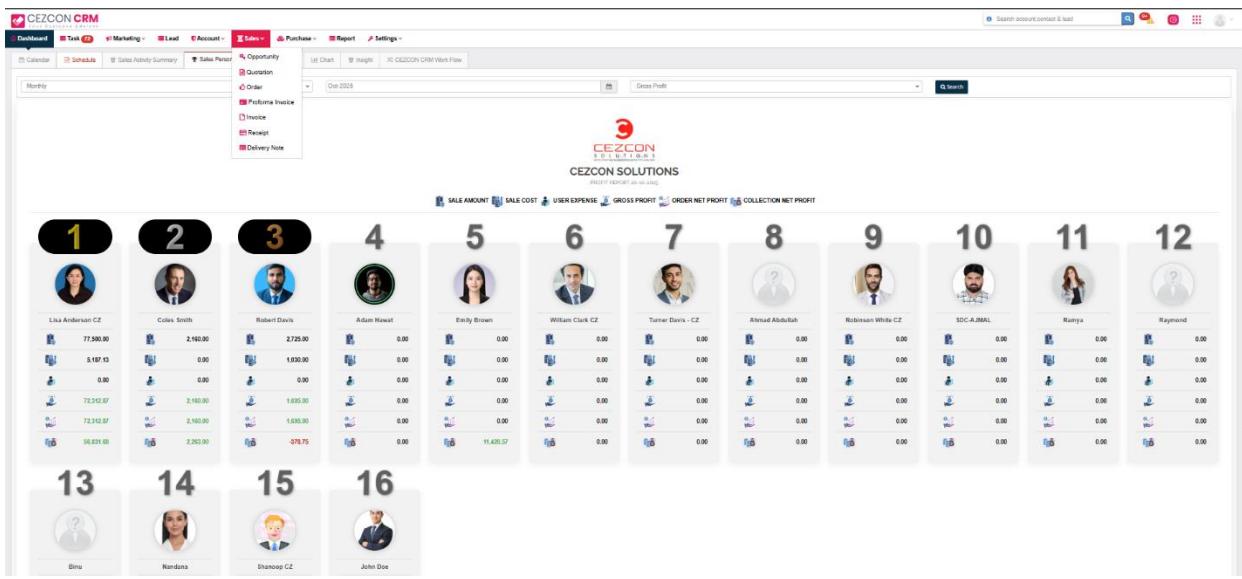
Opportunity ID	Owner	Amount
OP-001	Lisa Anderson CZ	77,300.00
OP-002	Coles Smith	5,197.13
OP-003	Bina	0.00
OP-004	Nandana	72,312.87
OP-005	Shanoop CZ	2,160.00
OP-006	John Doe	56,831.68
OP-007	Adam Hawat	0.00
OP-008	Emily Brown	0.00
OP-009	William Clark CZ	0.00
OP-010	Turner Davis - CZ	0.00
OP-011	Ahmed Abdullah	0.00
OP-012	Robinson White CZ	0.00
OP-013	SDC-AJMAL	0.00
OP-014	Ramya	0.00
OP-015	Raymond	0.00

13 **14** **15** **16**

TOTAL GROSS PROFIT **73,536.62**

TOTAL ORDER NET PROFIT **73,536.62**

TOTAL COLLECTION NET PROFIT **22,543.26**



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Dashboard Task 72 Marketing Lead Account Sales Purchase Report Settings

Lead List

Show 10 Rows

SL.No	Lead Date	Lead Assigned	Contact Details	Lead Spec	Created By	Owner	Rating	Status	Last Activity	Actions
1	17-10-2025	20-10-2025	Mr. Nirmay Assistant Manager Layland +91544967976 +9156736755	Automobile Meta Quais			WARM	Contacted	20-10-2025 Today	More
2	09-09-2025		Mr. Gazal Owner xyz +91548523645	Trade License Email Marketing			WARM	Contacted	14-10-2025 5 days	More
3	09-09-2025		Mr. Nitin Abra tyres trading +91509373415	Cezcon CRM Telemarketing , google			COLD	Pending	09-09-2025 41 days	More
4	09-09-2025		Mr. Kishan kumar Sydney Metal TR LLC +91544967976 sydneymetaltrading@yahoo.com	Cezcon CRM Telemarketing , yellow page			HOT	Contacted	13-09-2025 37 days	More
5	08-09-2025		Mr. Raja Nasir partner +91551609832	Cezcon CRM Reference , Customer from previous company			WARM	Contacted	13-09-2025 37 days	More
6	05-09-2025	08-09-2025	Mr. Sanjay Raj Sales co ordinator xyz +91544967976 +9152678718 sanpayne@gmail.com	Fire and Safety Meta , Instagram Fire and Safety			WARM	Contacted	08-09-2025 40 days	More

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Dashboard Task 72 Marketing Lead Account Sales Manufacturing Report Settings

MANUFACTURING CREATED BY EMILY BROWN ON FRI 10-10-2025 9:42:26 AM

Overview Expenses Production

Manufacturing Details

Date	10-10-2025
Number	MF28
Name	Sheer Curtains
Status	Production
Comments	

Manufacturing Overview

Material Cost	\$ 0.00
Other Cost	\$ 0.00
Total Cost	\$ 0.00

Edit Delete Back

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Dashboard Task 72 Marketing Lead Account Sales Manufacturing Report Settings

Add Manufacturing

Manufacturing Date	20-10-2025	Manufacturing Number *	MF29
Manufacturing Name *		Comments	

Submit Back

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Dashboard Task (7) Marketing Lead Account Sales Manufacturing Report Settings

Manufacturing

Selected Date Select Start and End Date

Show 10 Rows Search Manufacturing

SL.No	Manufacturing No.	Name	Date	Owner	Status	Actions
1	MF28	Sheer Curtains	10-10-2025			
2	MF27	ceiling	27-06-2025			
3	MF25	Teak Wood	27-06-2025			
4	MF24	ceiling work	27-06-2025			
5	MF23	chappal	27-06-2025			
6	MF21	School Uniform	27-06-2025			
7	MF20	FZN82233	26-06-2025			
8	MF19	Royal Construction Tea Shirt Manufacturing	21-06-2025			
9	MF18	Table	19-06-2025			
10	MF17	100 Set of Uniform	14-06-2025			

Showing 1 to 10 of 25 entries

Add Store

Name *

Users None selected

Admin users and users with privileges of all stores do not need to be selected here, as they already have complete access to the store.

Location

Comments

Close **Submit**

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Dashboard Task (7) Marketing Lead Account Sales Store Report Settings

Store

Show 10 Rows Search

SL.No	Name	Location	Default	Actions
1	Cosmo UAE - Office Furniture Solutions	Al Quoz 1		
2	Sharjah			
3	Temporary Stock			
4	LPO Stock			
5	Warehouse Dubai			
6	Warehouse UAJ			
7	MUAMELAH			
8	Digital Printing Working			
9	digital printing working			
10	University School			

Showing 1 to 10 of 18 entries

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Dashboard Task 72 Marketing Lead Account Sales Products Report Settings

Product or Services Unit Brand Category

Category

Show 10 Rows

SL.No	Category	Actions
1	Financial Services	[Edit]
2	Food & Beverage	[Edit]
3	Industrial Machinery	[Edit]
4	Logistics	[Edit]
5	Retail	[Edit]
6	Technology	[Edit]
7	Luxury	[Edit]
8	Furniture	[Edit]
9	Software	[Edit]
10	Mobile	[Edit]

Showing 1 to 10 of 30 entries

1 2 3 >

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Dashboard Task 72 Marketing Lead Account Sales Products Report Settings

Product or Services Unit Brand Category Contact

Brand

Show 10 Rows

SL.No	Brand	Actions
1	Luxus	[Edit]
2	Dove	[Edit]
3	Knorr	[Edit]
4	Sunsilk	[Edit]
5	Indomie	[Edit]
6	Nescafe	[Edit]
7	Pepsi	[Edit]
8	Atlantis	[Edit]
9	ADNOC	[Edit]
10	Aramex	[Edit]

Showing 1 to 10 of 74 entries

1 2 3 4 5 >

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Dashboard Task 72 Marketing Lead Account Sales Products Report Settings

Product or Services Unit Brand Category

Unit

Show 10 Rows

SL.No	Unit	Actions
1	KG	[Edit]
2	ML	[Edit]
3	Litres	[Edit]
4	Grams	[Edit]
5	Pack	[Edit]
6	Box (Carton)	[Edit]
7	Cents	[Edit]
8	Sq ft	[Edit]
9	Volume	[Edit]
10	Length	[Edit]

Showing 1 to 10 of 25 entries

1 2 3 >

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Dashboard Task Marketing Lead Account Sales Products Report Settings

Product or Services

Stock Movement

Select Store: Select Account: Date Range: 01-01-2020 - 31-12-2020

Stock Movement of the Period - From 01-01-2020 To 31-12-2020

ID No.	Date	Name	Amount	Description	Stock	Stock	Stock
				Opening Stock			
				Kite			
							Closing Stock

Stock Details

Category: CLOTHES & FURNITURE SOLUTIONS

COMPUTER	1
DESKTOP	1
STUDY TABLE	1
LAPTOP	1
WARDROBE	1
WARDROBE UNIT	1
WARDROBE UNIT	1
MIRROR	1
DIGITAL PRINTING SERVICES	1
DIGITAL PRINTING SERVICES	1
UNIVERSITY SCHOOL	1
RSB	1
INDIA	1
SCORPIO	1
SOUL CARE	1
SOUL CARE	1
ACCOUTREMENT STORE	1
ACCOUTREMENT STORE	1
CLASSIC RECORD STORE	1
CLASSIC RECORD STORE	1
TOTAL STOCK	1

Add Product/Services

[Download Format](#) [Import Product/Services](#)

Serial No.	Code	Name *	Additional Description	Image	Unit	Brand	Category	Type	Purchase Rate	Selling Price	VAT%
S. No.	TW00507	Name	Additional Description	Choose	Unit	Brand	Category	Product	Purchase Rate	Selling Price	5
S. No.	TW00508	Name	Additional Description	Choose	Unit	Brand	Category	Product	Purchase Rate	Selling Price	5
S. No.	TW00509	Name	Additional Description	Choose	Unit	Brand	Category	Product	Purchase Rate	Selling Price	5
S. No.	TW00510	Name	Additional Description	Choose	Unit	Brand	Category	Product	Purchase Rate	Selling Price	5
S. No.	TW00511	Name	Additional Description	Choose	Unit	Brand	Category	Product	Purchase Rate	Selling Price	5

Code Prefix: TW00 Next Number: 512

[Add More](#)

Note: Maximum 50 rows allowed
Total 5 rows added.

[Close](#) [Submit](#)

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Dashboard Task Marketing Lead Account Sales Products Report Settings

Product or Services

Select Category: Select Brand: Select Unit: Select Type: All

Select Status: Active Select Store: All Store

Shows 10 Rows

Search Product/Services

SL.No	Serial No.	Code	Name	Image	Unit	Brand	Category	Type	Purchase Rate	Selling Price	VAT%	Status	Actions
1		 TW00506	Sheer fabrics		Meters			Product	0.00	0.00	5	<input checked="" type="checkbox"/>	Edit
2		 TW00505	Velvet		Meters			Product	0.00	0.00	5	<input checked="" type="checkbox"/>	Edit
3		 TW00504	Silk or faux silk		Meters			Product	0.00	0.00	5	<input checked="" type="checkbox"/>	Edit
4		 TW00503	Linen Fabric		Meters			Product	0.00	0.00	5	<input checked="" type="checkbox"/>	Edit
5		 TW00502	Cotton Fabric		Meters	Luxus		Product	0.00	0.00	5	<input checked="" type="checkbox"/>	Edit

Add Supplier

X

Name *

Tel

+971

Email

TRN

Address

Close

Submit

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Dashboard Task (2) Marketing Lead Account Sales Supplier Report Settings

Show 10 Rows

SL.No	Name	Contact	Email	TRN	Address	Outstanding	Actions
1	KIDS CLUB GAME TIME FZCO	+971573598765		7665198987765645	United Arab emirates.	4,850.00	O
2	KB Construction Dubai	+971543678234	kbconstruction@gamil.com	00122003312	karnataka	-1,520.00	O
3	galaxy Rtout					0.00	O
4	NewCare					6,050.00	O
5	Zahara Digital Marketing LLC	+971556789456	zahara@gmail.com	12345675464378	Business Bay, Dubai	7,875.75	O
6	ROYAL KEA	+97150 543 5678		456783457		5,040.00	O
7	Tritya Vehicles					0.00	O
8	BFT Gems	+971506 765 5678				-28,940.00	O
9	CEZCON Solution S	+97155 765 6544				0.00	O
10	Tarmesem					-340.00	O

Showing 1 to 10 of 23 entries

< 1 2 3 >

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Dashboard Task Marketing Lead Account Sales Stock In Report Settings

Add Stock In

Stock In Date: 20-10-2025 Supplier: Select Order: +New

Stock In Number: FRX 405LY 128 LPO/PO Number: Purchase Invoice Number: Purchase invoice number:

Store: Select Delivery Note: Delivery note number: Purchase invoice number:

DO File: Choose File No file chosen

Item	Unit	Purchase Rate	Selling Price	Stock In Quantity
Select Item				

+ Add More

Submit Back

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Dashboard Task Marketing Lead Account Sales Stock In Report Settings

Supplier: All

Stock In

Show: 10 Rows Search:

SL.No	Stock In Number	Stock In Date	Supplier	Purchase Invoice Number	Delivery Note	LPO Number	Actions
1	FRX 405LY 127	06-10-2025	NewCare	56		29	•
2	FRX 405LY 126	06-10-2025	NewCare	56		29	•
3	FRX 405LY 125	06-10-2025	ROYAL KEA	55		28	•
4	FRX 405LY 116	06-08-2025	KR General Trading			PO-25	•
5	FRX 405LY 115	06-08-2025	KR General Trading			PO-25	•
6	FRX 405LY 114	05-08-2025	AI Rayan				•
7	FRX 405LY 113	01-08-2025	Tameem				•
8	FRX 405LY 112	01-08-2025	Tameem				•
9	FRX 405LY 111	01-08-2025	KB Construction Dubai				•
10	FRX 405LY 109	22-07-2025	EcoMetals Supply Co.	P10077			•

Showing 1 to 10 of 84 entries

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Dashboard Task Marketing Lead Account Sales Purchase Payment Report Settings

Add Payment

Payment Number: Payment Date: 20-10-2025

Supplier: Select Supplier Amount:

Document: Choose File No file chosen Type: Cash

Description:

Submit Back

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Dashboard Task 72 Marketing Lead Account Sales Purchase Invoice Report Settings

PURCHASE INVOICE CREATED BY WILLIAM CLARK CZ ON 2 AM

Owner: William Clark CZ Date: 29-10-2025 Purchase Invoice Number: 1223 Supplier: Cezcon Software PO Number: FZN82320 Fire Fighting System | New Quality Order: Delivery Status: Pending Payment Status: Due File: Description:

Item	QTY	Purchase Rate	Selling Price
Fire Rated Cable	1	50.00	100.00
Plastic Bottle	1	80.60	100.00

[Edit](#) [Delete](#)

[Back](#)

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Dashboard Task 72 Marketing Lead Account Sales Purchase Invoice Report Settings

Add Purchase Invoice

Owner: Amjad	Amount:
Purchase Order Number:	Discount:
Purchase Invoice Number:	VAT Amount:
Supplier: Select	Adjustment:
Purchase Invoice Date: 20-10-2025	Total Amount:
Order: Select Order	Payment Due:
With Purchase Items? <input type="radio"/> Yes <input checked="" type="radio"/> No	File: Choose File No file chosen
Description:	

[Submit](#) [Back](#)

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Dashboard Task 72 Marketing Lead Account Sales Purchase Invoice Report Settings

Owner: All Owners Purchase Invoice Date: All Month & Year Supplier: Select Supplier Payment Status: Due

[Purchase Invoice](#) [+ Purchase Invoice](#)

Shows 10 Rows

SL.No	Owner	Purchase Invoice#	Date	Supplier	Amount	VAT	Total Amount	Paid	Balance	Status	Delivery Status	Actions
1		1223	20-10-2025	Cezcon Software	130.60	6.53	137.13	0.00	137.13	Due	Pending	Edit
2		1113	18-10-2025	Al Rayan	55,023.00	2,751.15	57,774.15	0.00	57,774.15	Due	Pending	Edit
3		1112	18-10-2025	Al Rayan	500.00	25.00	525.00	0.00	525.00	Due	Pending	Edit
4		57	06-10-2025	Al Rayan	1,800.00	90.00	1,890.00	0.00	1,890.00	Due	Pending	Edit
5		56	06-10-2025	NewCare	6,050.00	0.00	6,050.00	0.00	6,050.00	Due	Delivered	Edit
6		55	06-10-2025	ROYAL KEA	4,800.00	240.00	5,040.00	0.00	5,040.00	Due	Partially Delivered	Edit
7		678	12-08-2025	Zahara Digital Marketing LLC	143,902.00	7,548.75	151,450.75	151,450.00	0.75	Due	Pending	Edit
8		9878	02-08-2025	EcoMetals Supply Co.	1,000.00	50.00	1,050.00	0.00	1,050.00	Due	Pending	Edit
9		123	24-07-2025	Al Jahan	1,000.00	50.00	1,050.00	0.00	1,050.00	Due	Pending	Edit
10		P10077	22-07-2025	EcoMetals Supply Co.	2,750.00	137.50	2,887.50	2,887.00	0.50	Due	Delivered	Edit

Showing 1 to 10 of 23 entries 1 2 3 >

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Search account, contact & lead

Dashboard Task 72 Marketing Lead Account Sales Purchase Order Report Settings

Email Campaign

Description	Code	Unit	Brand	QTY	Amount	Total
Select Item				1		

+ Add Description + Add Product / Service

Terms & Condition Select

Amount: 0.00
Discount:
VAT %: 5
VAT:
Adjustment:
Total Amount: 0.00

Submit Back

CEZCON CRM Your Business Advisor

Search account, contact & lead

Dashboard Task 72 Marketing Lead Account Sales Purchase Order Report Settings

Add Purchase Order

Owner: Amjad	Opportunity/Order: Select Opportunity/Order
PO Number: PO-33	Project Number:
Reference#:	Project Name:
PO Date: 20-10-2025	Vat Type: With VAT
Expected Delivery Date:	Attention:
Supplier: Select Supplier	Prepared By: Amjad
Ship to:	Prepared By Mobile:
Purchase Order Type: Manual Creation	Prepared By Email: amjad@cezconcrm.com
Description:	Prepared By Designation:

Description	Code	Unit	Brand	QTY	Amount	Total
Select Item				1		

+ Add Description + Add Product / Service

Terms & Condition Select

Amount: 0.00
Discount:
VAT %: 5
VAT:
Total Amount: 0.00

CEZCON CRM Your Business Advisor

Search account, contact & lead

Dashboard Task 72 Marketing Lead Account Sales Purchase Order Report Settings

Purchase Order

Owner: All Owners	Purchase Order Date: 21-09-2025 - 20-10-2025	Supplier: Select Supplier	Purchase Order Type: Select Purchase Order Type										
Shows 10 Rows	Search Purchase Order												
SL.No	Owner	PO#	Date	Exp. Delivery	Supplier	Reference	Amount	VAT	Total Amount	Invoice Received	Approval	Delivery Status	Actions
1		PO-32	18-10-2025		KB Construction Dubai		200.00	10.00	210.00	Pending	Pending	Deliver	
2		PO-31	11-10-2025		KB Construction Dubai		50.00	2.50	52.50	Pending	Pending	Deliver	
3		PO-30	06-10-2025		AI Rayan		1,800.00	90.00	1,890.00	Pending	Pending	Deliver	
4		PO-29	06-10-2025		NewCare		6,050.00	0.00	6,050.00	Pending	Delivered	Deliver	
5		PO-28	06-10-2025		ROYAL KEA	aal maha	3,300.00	165.00	3,465.00	Pending	Partially Delivered	Deliver	

Showing 1 to 5 of 5 entries

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Dashboard Task Marketing Lead Account Sales Stock Report Settings

Stock

Stock Movement

Select Store: Select Account: Date: 01-10-2025 - 20-10-2025 **Print** **Reset**

FIRE HOSE REEL

CODE: ITM0007
NAME: Fire Hose Reel
BRAND: UPS
UPC:
CATEGORY: Retail
COST: 1,500.00
PRICE: 1,900.00

Date: 20 Oct 2025

Stock Movement Of The Period : From 01-10-2025 To 20-10-2025

Sl No.	Date	Number	Account	Description	Stockin	Stockout	Stock
	01-10-2025			Opening Stock		Total	216
							Closing Stock : 216

STOCK DETAILS

COMO UAE - OFFICE FURNITURE SOLUTIONS	: 19
SHARJAH	: 134
TEMPORARY STOCK	: 29
LPO STOCK	: 0
WAREHOUSE DUBAI	: 14
WAREHOUSE UAO	: 30
MURIBLAH	: 11
DIGITAL PRINTING IMPRINT	: 20
DIGITAL PRINTING WORKING	: 0
UNIVERSITY SCHOOL	: 5
RAK	: 0
INDIA	: 0
SCARF	: 0
TIRA STORE	: 0
VILLA INTERIORS STORE	: 0
ACCOUNTING SOFTWARE FOR PENDA	: 0
LAVISH WOOD STORE	: 0

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Dashboard Task 72 Marketing Lead Account Sales Stock Report Settings

Stock

Stock

Select Category: Select Brand: Select Status: Select Store: Shows: 10 Rows

Select Unit: Select Type: Search Product/Services

Purchase Order **Purchase Invoice** **Purchase Payment** **Stock In** **Supplier** **Products** **Store** **Manufacturing**

SL.No	Serial No.	Code	Name	Image	Unit	Brand	Category	Type	Purchase Rate	Selling Price	VAT%	Stock	View
1		ITM0007	Fire Hose Reel			UPS	Retail	Product	1,500.00	1,900.00	5	282	
2		ITM0008	Fire Rated Cable		Box (Carton)	UPS	Retail	Product	50.00	100.00	5	271	
3		ITM0005	Fire Sprinkler			PCS	UPS	Retail	60.00	75.00	5	2410	
4		ITM0004	Fire Extinguisher			PCS	UPS	Retail	200.00	260.00	5	10.5	
5		ITM0003	Ball Pen			Pack	UPS	Retail	6.00	9.00	5	254	
6	123	ITM0002	Plastic Bottle			PCS	UPS	Retail	80.00	100.00	5	373	
7		ITM0001	16 Channel DVR Full HD SIRA Approved			PCS	UPS	Retail	375.00	580.00	5	118	

DELIVERY NOTE CREATED BY JOHN DOE ON MON 20-10-2025 11:53:21 AM

Owner: John Doe	Date: 20-10-2025
Type: Customer DN	Number: FZE11942
Customer: Parsons Tea Outlet	Received By:
Order: FZN82322/Gypsum and Interior Work for Parsons Tea Outlet	Location:
Store: Lavish Wood Store	State/Region:
Invoice: 448	Contact Number: Abu Dhabi
Cost Update: <input checked="" type="checkbox"/> Yes	Reference:
Remarks:	

Serial No. **Code** **Item Description** **Unit** **Brand** **Qty** **Cost** **Total**

	PC327	Teak wood			1	2,500.00	2,500.00
		3D Designs & Visualization with Gypsum Work			4	0.00	0.00
		3d Ceiling Design			3	0.00	0.00

Print **Edit** **Delete** **Back**

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Dashboard Task (72) Marketing Lead Account Delivery Note Purchase Report Settings

Search account, contact & lead

Select Owner Order Invoice Type

All Owners Select Order Select Invoice All

Cost Update

Add Delivery Note

Show 10 Rows

SL.No	Owner	Number	Date	Order	Invoice	Type	Location	Received By	Approved By	Approved Contact Number
1	FZE11943	INFZE1	20-10-2025	Select Order	Select Invoice	Customer Delivery Note	Amjad			
2	INFZE1	INFZE1								
3	INFZE2	INFZE2								
4	INFZE3	INFZE3								
5	FZE11943	INFZE4								
6	FZE11943	INFZE5								
7	INFZE6	INFZE6								
8	FZE11943	INFZE7								
9	INFZE8	INFZE8								
10	INFZE9	INFZE9	05-09-2025	INFLOKS LLC						

Remarks

✓ Update material cost to order Close Submit

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Dashboard Task (72) Marketing Lead Account Delivery Note Purchase Report Settings

Search account, contact & lead

Select Owner Order Invoice Type

All Owners Select Order Select Invoice All

Cost Update

Add Delivery Note

Show 10 Rows

SL.No	Owner	Number	Date	Customer	Order	Invoice	Type	Location	Received By	Cost	Actions
1	FZE11942	20-10-2025	Parsons Tea Outlet	FZN82322 Gypsum and Interior Work for Parsons Tea Outlet	448	Customer DN	Abu Dhabi			✓	o-
2	INFZE10	20-10-2025	Parsons Tea Outlet	FZN82322 Gypsum and Interior Work for Parsons Tea Outlet	448	Internal DN				✓	o-
3	INFZE9	20-10-2025	Parsons Tea Outlet	FZN82322 Gypsum and Interior Work for Parsons Tea Outlet	417	Internal DN				✓	o-
4	INFZE8	10-10-2025	AL TAJ LLC	FZN82316 VAT Submission for a Year		Internal DN				✓	o-
5	FZE11941	24-09-2025	Anfal 050893544	FZN82309 Camry Mechanical Work		Customer DN	Anfal 050893544			✓	o-
6	FZE11940	24-09-2025	Anfal 050893544	FZN82309 Camry Mechanical Work		Customer DN	Anfal 050893544			✓	o-
7	INFZE7	22-09-2025	Al Wadif LLC	FZN82307 FIT OUT WORK		Internal DN				✓	o-
8	FZE11938	22-09-2025	Al Wadif LLC	FZN82307 FIT OUT WORK		Customer DN	Al Wadif LLC			✓	o-
9	INFZE6	22-09-2025	Royal Cargo LLC	FZN82308 Trading for YMF		Internal DN				✓	o-
10	INFZE5	05-09-2025	INFLOKS LLC	FZN82303 3D Designs & Visualization with gypsum work - INFLOKS Meeting Hall		Internal DN				✓	o-

Showing 1 to 10 of 133 entries

< 1 2 3 4 5 >

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Dashboard Task 72 Marketing Lead Account Receipt Purchase Report Settings

Add Receipt

Receipt Number: R#388

Account: Contact:

Receipt Date: 20-10-2025

Company: Select Company

Received Amount:

Document: Choose File No file chosen

Type: Cash

Receipt Tagging: Keywords attached to the receipt

Description:

Terms & Conditions: Select Terms & Conditions

Rich Text Editor:

body p

Submit Back

Select Account First.

Select Account First.

Select Account First.

CEZCON CRM Your Business Advisor

Dashboard Task 72 Marketing Lead Account Receipt Purchase Report Settings

Search account, contact & lead

Created By: All

Receipt Type: All

Receipt Date: 01-10-2025 - 31-10-2025

Company: Select Company

Receipt Tagging: Select

Receipt

ADD INVOICE REF TO ADVANCE PAYMENT + RECEIPT

SI No.	Date	Created By	Receipt No.	Company	Type	Tagging	Amount	Action
1	18-10-2025		R#387	Rameez Group of Industries	Cash		2,269.00	
2	18-10-2025		R#388	New Quality Fire and Safety	Cash		10,000.00	
3	14-10-2025		R#385	SMART EDGE	Cash		7,350.00	
4	11-10-2025		R#384	Xess Advertising	Cash		52,500.00	
5	10-10-2025		R#383	valley sports equipment trading LLC	Bank Transfer		1,312.50	
6	10-10-2025		R#382	valley sports equipment trading LLC	Cash		1,312.50	
7	09-10-2025		R#381	AL TAJ LLC	Cash		666.25	
8	08-10-2025		R#380	KIDS CLUB GAME TIME FZCO	Cash		7,500.00	
9	08-10-2025		R#379	KIDS CLUB GAME TIME FZCO	Cash		4,500.00	

Showing 1 to 9 of 9 entries

* indicates required field

Add Invoice

Invoice Details

Invoice Number *	449	Invoice Date	20-10-2025
Company *	Select Company	Invoice Due Date	
Opportunity/Order *	Select	Order	Order Name Order Number
LPO Number		LPO Date	
Invoice Type	File Upload <input type="button" value="Choose File"/>	With VAT	Reference Number
Document	<input type="button" value="Choose File"/> No file chosen	Amount *	
Discount		VAT	5 % <input type="button" value="VAT Amount"/>
Adjustment		Total	
Payment Location	Search location	Description	

Add Receipt

Submit Back

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Your Business Advisor

Search account, contact & lead

Dashboard Task 72 Marketing Lead Account Invoice Purchase Report Settings

Invoice

Show: 10 Rows Search Invoice + INVOICE

SI No.	Date	Owner	Invoice No.	Opportunity/Order	Account	Amount	VAT	Total	Paid	Balance	Status	Action
1	20-10-2025		448	FZN82322 / Gypsum and Interior Work for Parisons Tea Outlet Interior Designing	Parsons Tea Outlet Mr. Abdul Jaleel +971504564232 +9715493458869	45,000.00	2,250.00	47,250.00	6,000.00	42,250.00	Due	
2	18-10-2025		446	FZN82320 / Fire Fighting System New Quality Fire Alarm	New Quality Fire and Safety Mr. Rizwan +971971254626	27,500.00	1,375.00	28,875.00	10,000.00	18,875.00	Due	
3	16-10-2025		445	FZN8209 / Product order 1 Ac Cleaning	Abraj Al Mansourah Const (LLC) +971 6 5720933	5,400.00	270.00	5,670.00	0.00	5,670.00	Due	
4	08-10-2025		438	FZN8381 / Supply And Installation Of SIRA Approved IP CCTV Surveillance System And Authority Approval CC TV Installation	KIDS CLUB GAME TIME FZCO Mr. Mohan raj	10,047.62	802.38	10,850.00	12,000.00	4,850.00	Due	
5	04-10-2025		437	Cz - 8374 / RK group/Electrical Electronics	RK Group of Company Mr. Samad K +97156786043 +97152366745 samad@gmail.com	9,500.00	475.00	9,975.00	0.00	9,975.00	Due	
6	03-10-2025		434	FZN82274 / Flat-Parisons Cofee Outlet Construction	Parisons Coffee outlet Mr. Sanaya Mirsa +9715007860032 +9715556720073	5,000.00	250.00	5,250.00	0.00	5,250.00	Due	
7	27-09-2025		432	Cz - 8374 / RK group/Electrical Electronics	RK Group of Company Mr. Samad K +97156786043 +97152366745 samad@gmail.com	8,350.00	417.50	8,767.50	0.00	8,767.50	Due	
8	25-09-2025		430	Cz - 8376 / Auditing Consulting for ROYALTECH LLC Audit Consulting	ROYALTECH LLC Mr. ROHAN	100,000.00	0.00	100,000.00	4,000.00	96,000.00	Due	
				E7N82274 / Parisons Cofee Outlets	Anfal 050803544							

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Dashboard Task 72 Marketing Lead Account Proforma Invoice Purchase Report Settings

Add Proforma Invoice

Company *	Select Company	Opportunity/Order *	Select
Quotation		Proforma Number *	PRN-32
Invoice Date	20-10-2025	LPO Date	
LPO Number		Type	File Upload With VAT
Remarks		Discount	
Amount		Adjustment	
VAT	5 %	VAT Amount	
Total Amount			
File	<input type="button" value="Choose File"/> No file chosen		
<input type="button" value="Submit"/> <input type="button" value="Back"/>			

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Dashboard Task 72 Marketing Lead Account Proforma Invoice Purchase Report Settings

Proforma Invoice

Select Owner	Proforma Invoice Date	Company	Opportunity
All Owners	<input type="button" value="All Month & Year"/>	Select Company	Select Opportunity
Proforma Invoice Type	Product/Service		
Select Invoice Type	Select Product/Service		

+ PROFORMA INVOICE

Show	10 Rows	Search								
SL.No	Proforma Invoice	Date	Owner	Company	Opportunity	Quotation	Amount	VAT	Total	Actions
1	PRN-31	2025-10-11	Xess Advertising	Office Furniture for Xess Advertising / Office Furniture for Xess Advertising	Qn 567855	50,000.00	2,500.00	52,500.00	<input type="button" value="Edit"/>	
2	PRN-30	2025-10-09	ALT AJ LLC	VAT Submission for a Year / VAT Submission for a Year		5,000.00	250.00	5,250.00	<input type="button" value="Edit"/>	
3	PRN-29	2025-10-02	ADACC LLC	Kitchen interior designing for ADACC LLC / Kitchen interior designing for ADACC LLC	Qn 567868	1,350.00	67.50	1,417.50	<input type="button" value="Edit"/>	
4	PRN-28	2025-09-25	AI Wadif LLC	FIT OUT WORK / FIT OUT WORK		0.00	0.00	0.00	<input type="button" value="Edit"/>	
5	PRN-27	2025-09-22	AI Wadif LLC	FIT OUT WORK / FIT OUT WORK	Qn 567858	12,900.00	645.00	13,545.00	<input type="button" value="Edit"/>	
6	PRN-26	2025-08-28	Vibe Concepts General Maintenance Contracting	Interior Work for Vibe Concepts / Interior Work for Vibe Concepts	Qn 567842/1	50,950.00	2,547.50	53,497.50	<input type="button" value="Edit"/>	
7	PRN-25	2025-08-21	ADACC LLC	Kitchen interior designing for ADACC LLC / Kitchen interior designing for ADACC LLC		2,500.00	125.00	2,625.00	<input type="button" value="Edit"/>	
8	PRN-24	2025-08-20	Shafi	CompressionShaft / CompressionShaft	Qn 567835	950.00	50.00	1,000.00	<input type="button" value="Edit"/>	
9	PRN-22	2025-08-20	Renz Group of Companies	Fire Alarm/Renz Group / Fire Alarm/Renz Group		3,239.00	162.00	3,401.00	<input type="button" value="Edit"/>	
10	PRN-21	2025-08-12	CAD Group	UPPLY & INSTALLLTION FCU CAD Group / UPPLY & INSTALLLTION FCU CAD Group	Qn 567821	0.00	0.00	0.00	<input type="button" value="Edit"/>	

Showing 1 to 10 of 30 entries

1 2 3 >


Your Business Advisor

Dashboard
Task 72
Marketing
Lead
Account
Order Order
Purchase Purchase
Report Report
Settings Settings






Add Order
Accounts +Accounts

Company Name *

Order Title *

Source ?

Order Date *  

Amount

VAT Type

Adjustment

Order Tagging

Business Opportunity *

LPO Number

Location 

Type

Order Owner 

Point of Contact

Source Name

Order Number * 

Opportunity Number * 

Discount

VAT 

Total Amount

Campaign ?

Delivery Date

LPO Date 

Comments

Order Status

Order Form

Submit
Back

Order										Business Opportunity				Campaign									
Order Date			Order Owner			Business Opportunity			Campaign														
All Month & Year			All Owners			Select			Select Campaign														
Tagging			Order Status			Order Type			Invoice Status														
Select			All			All			All														
Order										Business Opportunity				Campaign									
Shows 10 Rows										Search Order													
SL. No	Owner	Order Date	Order Details			Company			Order Status	Amount	VAT	Total	Profit	Receivable	Actions								
1		20-10-2025 9:20 AM	FZN82322 / Cz - 8337 Gypsum and Interior Work for Parsons Tea Outlet 			Parsons Tea Outlet Mr. Abdoul Jaleel +9715045642312 +971549345889				45,000.00	2,250.00	47,250.00	-2,631.25	31,750.00									
2		18-10-2025 3:28 PM	FZN82321 / Cz - 8392 Advertising/Rameez Group 			Rameez Group of Industries Mr. Kadeejah +971457976878 +9710556707			Document Pending	2,160.00	108.00	2,268.00	2,160.00	0.00									
3		18-10-2025 12:28 PM	FZN82320 / Cz - 8390 Fire Fighting System New Quality 			New Quality Fire & Safety Mr. Rowan +971971254020				27,500.00	1,375.00	28,875.00	27,362.87	18,875.00									
4		18-10-2025 3:49 PM	FZN82319 / Cz - 8388 Interior design for Abc traders 			3 Star				0.00	0.00	0.00	0.00	0.00									
5		11-10-2025 12:42 PM	FZN82318 / Cz - 8364 Office Furniture for Xess Advertising 			Xess Advertising Mr. Biju			Pending	50,000.00	2,500.00	52,500.00	44,850.00	0.00									
6		10-10-2025 3:45 PM	FZN82317 / Cz - 8384 order 			valley sports equipment trading LLC Mr. Mutasa sabir +971507752066 mutasa@valley-sport...			Document Pending	1,250.00	62.50	1,312.50	1,250.00	-1,312.50									
7		08-10-2025 4:05 PM	FZN82316 / Cz - 8382 VAT Submission for a Year 			AL TAJ LLC Mr. Thwaha Bin Abdullah +9715082774578 +9715176370873 thwaha@al-tajllc...			Started	625.00	31.25	656.25	595.00	0.00									

Select Owner	Quotation Date	Select Quotation Type	Status							
All Owners	21-09-2025 - 20-10-2025	Select Quotation Type	All							
Company	Select Opportunity	Product/Service								
Selected Company	Select Opportunity	Select Product/Service								
Quotation			+ QUOTATION							
Shows 10 Rows		Search Quotation								
SL.No	Quotation#	Owner	Date	Opportunity	Company	Amount	VAT	Total	Status	Actions
1	SBCQ-3919		20-10-2025	Gypsum and Interior Work for Parsons Tea Outlet Interior Designing	Mr. Abdhil Jaleel +9715049542312 +971540345889	45,000.00	2,250.00	47,250.00	Rejected	
2	SBCQ-3918		20-10-2025	Supply of Steel for YFC LTD Trade License	Mr. SHAHID +9715542568 +97156473837	10,000.00	500.00	10,500.00	Pending	
3	SBCQ-3912		20-10-2025	Supply of Steel for YFC LTD Trade License	Mr. SHAHID +9715542568 +97156473837	8,519.05	0.00	8,519.05	Awarded	
4	SBCQ-3911		20-10-2025	Supply of Steel for YFC LTD Trade License	Mr. SHAHID +9715542568 +97156473837	120,000.00	6,000.00	126,000.00	Rejected	
5	SBCQ-3910		18-10-2025	Visa/Res Hospital 30 days visa	Dr. Prasad +971456788787 +9713456588888	1,000.00	50.00	1,050.00	Waiting For Approval	
6	SBCQ-3909		18-10-2025	Fire Fighting System New Quality Fire Alarm	Mr. Rizwan +971971254626	27,500.00	1,375.00	28,875.00	Awarded	
				An maintenance Valley Sports	Mr. Mutea sahir					

[Add Quotation](#)

Quotation Number *	SBCQ-3920	Quotation Date	20-10-2025
Opportunity *	Select Opportunity	Quotation Type *	File Upload With VAT
File	<input type="file" value="Choose File No file chosen"/>	Description	
Amount		Discount	
VAT	5 %	VAT Amount	Adjustment
Total Amount			
<input checked="" type="checkbox"/> Update quotation amount in opportunity <input type="button" value="Submit"/> <input type="button" value="Back"/>			

Search account,contact & lead Q 9+ 📈 🌐

Dashboard Task 72 Marketing Lead Account Opportunity Purchase Report Settings

All 123 Unread 44 Open 412 Today 2 Overdue 596 Upcoming 1 Lost 53 Order 734

Open Opportunities

Show 10 Rows

SL.No	Owner	Opportunity Date	Opportunity	Company	Last Activity	Close Date	Stage & Win Probability	Amount	Actions
1		20-10-2025 Today	Cz - 8394 Construction work for Mr Rahman's Project Construction	Rahman Residential House Mr. Rahman +919719714753776 +91971971569757 rahman@gmail.com	20-10-2025 Today	25-05-2026 217 days	New Enquiry 33%	225,000.00	Edit
2		20-10-2025 Today	Cz - 8393 Supply of Steel for YFC LTD Trade License	YFC LTD Mr. SHAHID +91715542566 +917156473837	20-10-2025 Today	20-10-2025 - Today	Quotation Sent 100%	10,000.00	Edit
3		18-10-2025 2 days	Cz - 8391 VisaRea Hospital 30 days visa	Rea Hospital Dr. Prasad +9171458768787 +917134955886868	18-10-2025 2 days	30-10-2025 10 days	New Enquiry 30%	1,000.00	Edit
4		19-10-2025 2 days	Cz - 8389 Ac maintenance Valley Sports Ac Cleaning	valley sports equipment trading LLC Mr. Mutea sabir +9171507752666 mutea@val...	18-10-2025 2 days	22-10-2025 2 days	Quotation Sent 65%	1,500.00	Edit
5		11-10-2025 3 days	Cz - 8385 blinds for Home Cezon CRM	SMART EDGE Mr. ANIL CHANDRA +9171569848833 anil@smart...	20-10-2025 Today	10-10-2025 - 10 days	Price issue	7,000.00	Edit
6		10-10-2025 10 days	Cz - 8383 Sheer Curtains for Amana Sheer Curtains	Amana AZ Mr. Muhammed +917167854538	20-10-2025 Today	31-10-2025 11 days	Quotation Created 60%	4,500.00	Edit
7		08-10-2025 12 days	Cz - 8381 Supply And Installation Of SIRA Approved IP CCTV Surveillance System And Authority Approval CC TV Installation	KIDS CLUB GAME TIME FZCO Mr. Mohan raj	08-10-2025 12 days	23-10-2025 3 days	New Enquiry	17,550.00	Edit
				valley sports					

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Search account,contact & lead Q 9+ 📈 🌐

Dashboard Task 72 Marketing Lead Account Opportunity Purchase Report Settings

Add Opportunity

Account **Contact** **+ Account** **X**

Company Name *	Select Company	Opportunity Number *	Cz - 8395
Opportunity Owner	Amjad	Opportunity Date	20-10-2025
Opportunity Title *		Point of Contact	Select Company First
Source ?	Select Source	Source Name	Name of the source. Eg Google, LinkedIn
Rating ?	COLD WARM HOT	Stage	New Enquiry
Close Date *	Expected Closing Date	Amount	Proposed Amount
Opportunity Tagging	Keywords attached to the opportunity	Campaign ?	Select Campaign
Business Opportunity *	Select Business Opportunity	Delivery Date	
LPO Number		LPO Date	
Next Action		Competitors Details	
Win Probability	10%	Location	Search location
Comments		Type	Select Type

Add Contact

Contact Owner	Amjad	Opportunity
Company Name	Select Company	Quotation
Source Name	Name of the source. Eg Google, LinkedIn	Order
Designation	Eg: CEO/Manager	Proforma Invoice
Business Mobile	+971	Invoice
Email	Add multiple emails by pressing Tab button.	Receipt
Nationality	Select	Delivery Note
Comments		
Submit Back		

Add Contact

Contact Owner	Amjad	Contact Name *	Mr. Point of contact
Company Name	Select Company	Source	Select
Source Name	Name of the source. Eg Google, LinkedIn	Campaign	Select Campaign
Designation	Eg: CEO/Manager	Tel(Ext)	+971 Extension number of point of contact
Business Mobile	+971	Personal Mobile	+971
Email	Add multiple emails by pressing Tab button.	Address	Address of point of contact
Nationality	Select	Spoken Language	Select
Comments			
Submit Back			


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Search account, contact & lead
Search
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Add Account
Edit
X

Account Details

Account Owner	Amjad	Company Name *	
Parent Company	Select Parent Company	Account Tagging	Keywords attached to the company
Key Customer?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Industry Type	Select
Source ?	Select	Source Name	Name of the source. Eg Google, LinkedIn
Campaign ?	Select	No. of Employees	
Tel	+971 Landline	Website	https://www.example.com
Email	Add multiple emails by pressing Tab button.	Address	Office No, PO Box, Street, City etc...
Country	United Arab Emirates	State/Region	Select
Location	Search location	Comments	
Logo	Choose File	TRN	
Is Supplier?	<input type="checkbox"/>		

Add contact details



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Your Business Advisor

9+

Dashboard
 Task 72
 Marketing
 Lead
 Account
 Sales
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 Report
 Settings

Add Lead

Mr.
Point of contact

+971
Business Mobile

Add multiple emails by pressing Tab button.

Select Campaign

Name of the source. Eg Google, LinkedIn

Pending
Contacted
Disqualified

Search location

Lead Date

Designation

+971
Personal Mobile

Nationality
Select Nationality

+971
Landline

Lead Tagging

Select Source

COLD
WARM
HOT

Business Opportunity
Select Business Opportunity

Comments

Submit
← Back