





CRM


Key Features



User Management


Inventory Management


Leads Management


Customer Management


Invoice/Billing





Reports

User Management

- ✓ Add New User
- ✓ Edit User
- ✓ Delete User
- ✓ Enable/Disable User
- ✓ Multiple User Roles (**Super Admin**, **Sales Coordinator**, **Manager**, **Employee**, **Engineer**, **Accountant**)

Users					
Add User					
Show <input type="text" value="10"/> entries					
ID	Name	Role	Email	Phone	City
27	wsfsdfsd	Service Engineer	engineer@gmail.com	0999998887	Kolkata
26	test Accountant	Accountant	accountant@gmail.com	00099999988	Kolkata

Inventory Management

All Products(107)		
Add product		
Show <input type="text" value="10"/> entries		
Sl no	Image	Title
1		ASD 35 B- Battery operated Scrubber Drier
2		Fogging Machine
3		VAC-530, 7.5 HP, Side Channel Blower, 3 Phase

- ✓ Add Product Category
- ✓ Edit Category
- ✓ Delete Category
- ✓ All Categories
- ✓ Add Product
- ✓ Edit Product
- ✓ Delete Product
- ✓ All Products
- ✓ Stock Management

Leads Management

- ✓ Add New Lead
- ✓ Edit Lead
- ✓ Assign Lead/Lead Distribution
- ✓ Follow Up
- ✓ Demo & Visit
- ✓ Lead Stages (**Opportunity**, **Order Recieved**, **Irrelevant**, **Restore**)
- ✓ Search & Filter
- ✓ Send Quotation (PDF)

Opportunities (19)

New Leads
Opportunity
Order Received
Irrelevant

With selected: Select Submit

Filter Demo

ID	Query
4512	Glass Jar Manufac
4510	Glass Jar Manufac

Lead Details

← Back

Highlight: Yellow

Opportunity Stage	Assigned Manager	Assigned Employee
	test manager	

Customer Management

ngal	8787878	Jessore Road West	Manager One	+ ✎ 🔒 🗑	✓ Add New Customer
ENGAL	admin@gmail.com	Jessore Road West, Banamalipur, Barasat, kolkata 700124	Admin Panel	+ ✎ 🔒 🗑	✓ Edit Customer
ngal	0000000	Jessore Road West	Manager 11	+ ✎ 🔒 🗑	✓ Delete Customer
ngal	000000	Jessore Road West	Sales	+ ✎ 🔒 🗑	✓ All Customers
ngal	000000	Jessore Road West	Sales	+ ✎ 🔒 🗑	✓ Customer Booking
ngal	000000	Jessore Road West	Admin Panel	+ ✎ 🔒 🗑	✓ Booking Status
ngal	000000	Jessore Road West	Admin Panel	+ ✎ 🔒 🗑	

Invoice/Billing

- ✓ User Roles: **Admin**, **Accountant**
- ✓ Create Payment
- ✓ One Time Payment/Milestone Payment
- ✓ Send to Customer
- ✓ Invoice History
- ✓ Demo & Visit

mail: changei814@gmail.com

mobile: +91-9830766610

+ Add Payment

Payment	Outstanding	Date
100.00	3000.00	12-07-2023 📅
200.00	2800.00	06-07-2023 📅
Total: Rs.3,100.00		Payment: Rs.300.00 Out Standing: Rs.2,800.00

Report

Generate Report

Type: Opportunity | Date From: dd-mm-yyyy | Date To: dd-mm-yyyy

[Export in Excel](#)

ID	Query	Name	Mobile
4510	Glass Jar Manufacturers	User	+9XXXXX
4307	Phone Inquiry via NumberMasking, 2023-04-18 16:30:34, IN, +919810253339	Phone Inquiry	+919810253339

- Filter Leads
- Per Day report
- Weekly Report
- Monthly Report
- Format: CSV, Excel

Other Features

- Interactive Dashboard
- Lead Automation using APIs and Cron Job
- After sale services
- Todo List
- Auto Assign
- Webmail Integration
- Whatsapp Integration
- Fully Customizable

Dashboard Overview:

- New Leads: 4460
- Opportunities: 18
- Completed: 25

Latest Members:

- wsfsdfs
- test Accountant
- test employee1 Employee
- test manager Manager
- Employee Two Employee
- Employee One Employee
- CRM Admin

Note: ** We can customize the functionalities as per client's requirement. We can add new modules, modify modules and remove modules.

Thank You