

**Sales Lead
Tracker**



SALES LEAD TRACKER

SALES LEAD MANAGEMENT SOLUTION

ONLINE LEAD MANAGEMENT SYSTEM

**EMPOWERING YOUR SALES
SUCCESS**





Introducing Sales Lead Tracker, a cutting-edge software designed to redefine the way you approach sales and marketing activities. More than just a lead and inquiry management solution, Sales Lead Tracker is your comprehensive tool for end-to-end sales excellence. From efficient contact and product management to streamlined document handling, quotation management, and insightful campaign tracking, this software is your all-in-one solution.

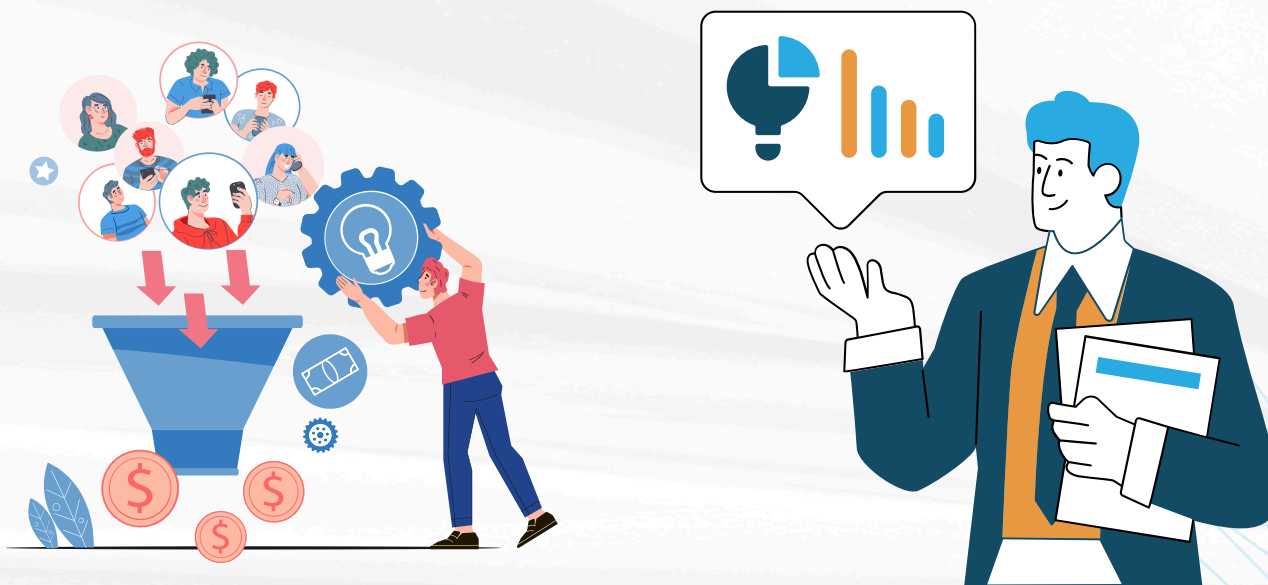
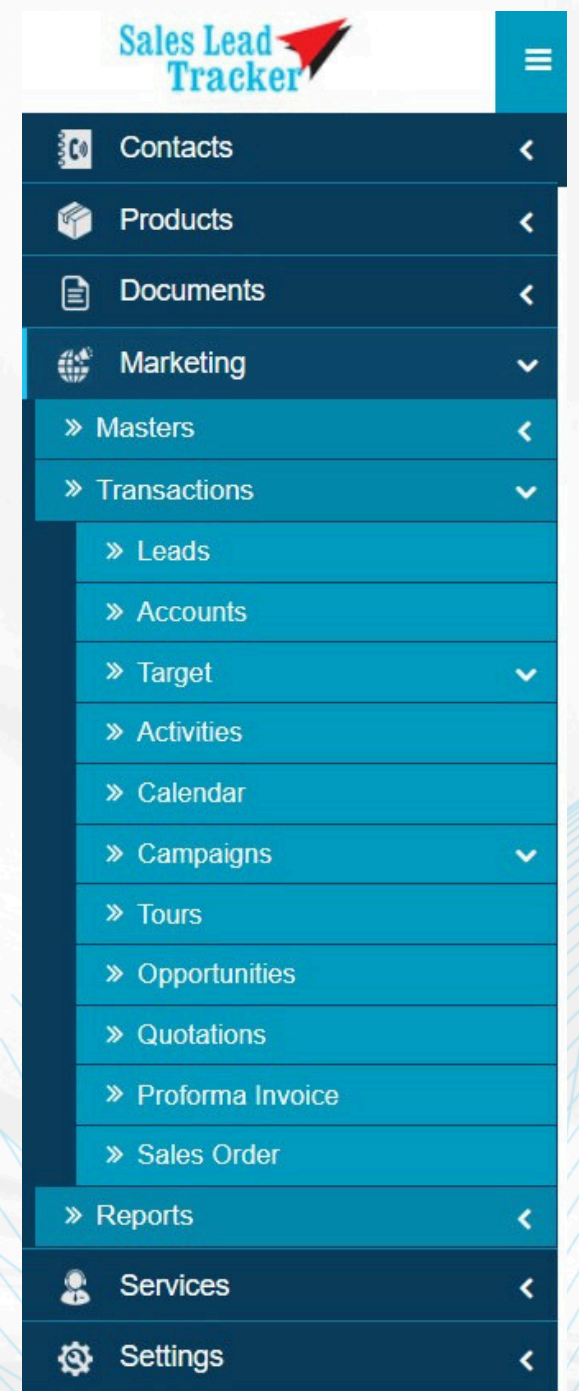
Elevate your operations with detailed reports, empowering your team to make informed decisions and drive unparalleled success. Sales Lead Tracker is not just a software; it's the catalyst for optimizing your entire sales process.

Why Sales Lead Tracker ?

Setting a New Standard in End-to-End Sales Excellence

In the dynamic landscape of sales and marketing, managing leads effectively can be the key differentiator between success and stagnation. Sales Lead Tracker is designed to empower your team with robust features, ensuring that no opportunity is overlooked. With this software, you gain a competitive edge, maximize efficiency, and witness unprecedented growth.

Unlike other software, our platform is not confined to singular functionalities; it's a comprehensive suite that revolutionizes your workflow. From the initial point of contact management to the final stages of sales order and itemized reporting, Sales Lead Tracker ensures a holistic approach.



OVERCOMING LEAD MANAGEMENT CHALLENGES WITH SALES LEAD TRACKER

CHALLENGES

Difficulty in tracking and recording marketing and sales activities

Scattered lead data across Excel sheets & notepads

Collaboration challenges within the sales team

Difficulty in categorizing the next follow-up activity

Lack of automation in managing leads manually

Absence of records or reports to track the work done by sales personnel daily or monthly

Slow and time-consuming manual entry of leads

Difficult & time-consuming to build reports on sales activity in your tour management

Not able to view sales funnel, especially in quotation and order stage

Not able to view real time funnel for specific products or selling price

No method to transfer leads and account data in case of transfer of executive

No reports and data on missed follow-ups

No procedure for escalation

Absence of mass mailing and tracking campaign efficiency

No feature to send groupwise quotations

SOLUTIONS

Sales Lead Tracker offers seamless activity tracking, ensuring every interaction is recorded and analyzed for strategic decision-making.

Sales Lead Tracker consolidates all your lead information in one centralized platform for easy access and organization.

Enhance teamwork with Sales Lead Tracker's collaborative features, fostering seamless communication and shared insights among team members.

Streamline follow-up processes with Sales Lead Tracker's intuitive interface, making it simple to categorize and prioritize follow-up activities.

Embrace automation with Sales Lead Tracker, minimizing manual efforts and maximizing efficiency in lead management.

Gain actionable insights with Sales Lead Tracker's detailed reports, offering a comprehensive view of your team's productivity over any given period.

Speed up lead entry processes with Sales Lead Tracker's efficient data entry features, ensuring that no time is wasted in capturing crucial information.

Utilize the customizable reporting features to quickly generate detailed reports on sales activities in your sales tours. View automatically generated tour activity reports.

Utilize SLT features to track & visualize your sales funnel, including the quotation & order stages.

View itemized reports of repeat orders of products with prices at which items are sold.

Sales Lead Tracker's data transfer tools seamlessly transfers leads data ensuring continuity management.

Reporting capabilities to generate reports on missed follow-ups and take proactive measures to address them.

Utilize Sales Lead Tracker's escalation features to establish clear procedures for handling escalated issues.

Utilize Sales Lead Tracker's mass mailing and campaign tracking features to efficiently manage and track your marketing campaigns.

Utilize Sales Lead Tracker's group quotation feature to streamline the quotation process and send quotations to multiple groups simultaneously.

No option to manually estimate targets vs achievement

No data to see which product is fast moving or selling or not

Sales Lead Tracker allows the user to enter monthly targets for each sales representative and also view their monthly targets achieved. Thus recording data on target vs efficiency.

Utilize Sales Lead Tracker's product analytics features to analyze sales data and identify top-selling products.

FUNCTIONALITY OF SOFTWARE

Contact Management

- **Quick Contact:** Efficiently capture and manage contact information.
- **Contact Details:** Store essential details like name, type, industry, source, & lead manager. Record basic details, statutory information, & additional addresses.

Product Management

- **Product Name and Details:** Organize products with information such as name, category, and type.
- **HSN Code Integration:** Easily incorporate HSN codes for precise product identification.
- **Parent Product Details:** Gain insights into parent product details for a holistic view.
- **Industry and Service Specifics:** Categorize products based on industry and service details.

Document Management

- **Correspondence:** Manage all communication with robust correspondence management.
- **Email Templates:** Streamline communication with customizable email templates.
- **Document Attachment:** Easily attach documents to enhance collaboration and accessibility.

Intuitive Dashboard:

- Centralized and visually engaging hub to access key information and metrics.
- Offers a comprehensive snapshot of critical data

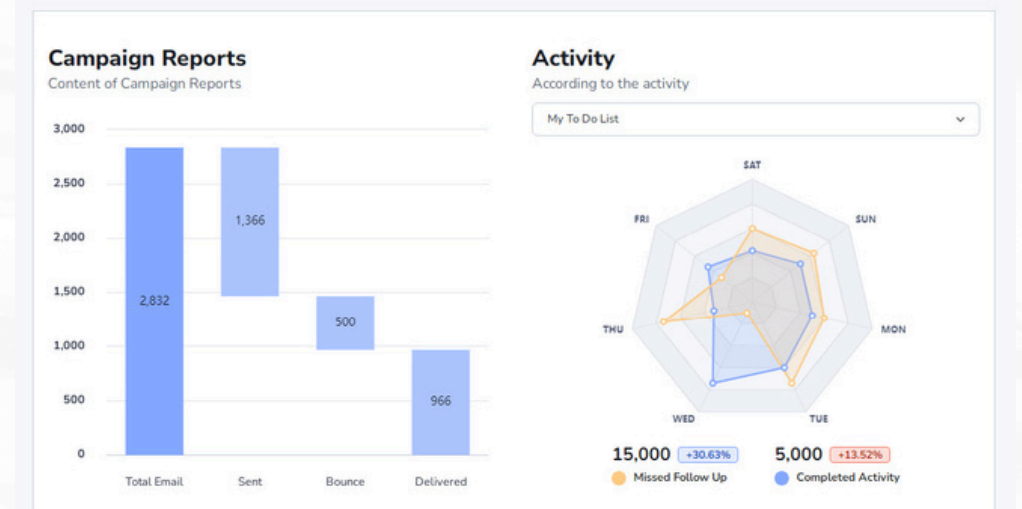
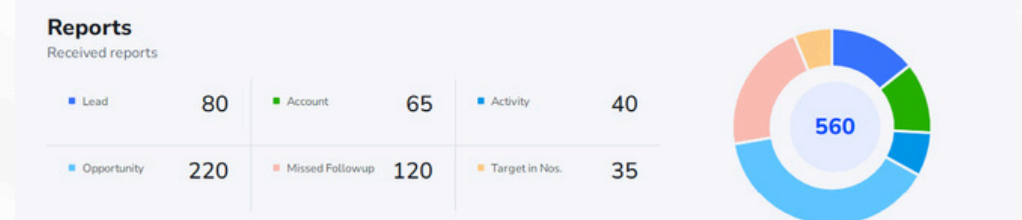
Marketing Activity Management

Sales Lead Management

- **Lead Management:** Easy and secure access to navigate leads with cutting-edge mechanisms.
- **Data Storage:** Facilitates secure lead data storage management. Eliminates the risk of errors and safeguards against all types of data harm.
- **Lead Tracking Management:** Easy monitoring of team member's lead-related activities at any stage

Contact Name	Account Name	Designation	Department	Created By	Company-Branch	UDF
Bhavik Bharatbhai Khakhar	Aaswad foods	Partner	--	Mayank	EVEREX INFOTECH LTD.-H.O. PVT.	
Bhavjit Navsukhrai Vatshnav	Bhavjit & Co	proprietor	--	Nitesh	EVEREX INFOTECH LTD.-H.O. PVT.	
C.ANIL BHANDARI	ANIL BHANDARI & ASSOCIATES	Proprietor	--	Pradnya	EVEREX INFOTECH LTD.-H.O. PVT.	
C.A KISHORE SHYAMLAL PESHORI	K S PESHORI & CO	Owner	--	Nitesh	EVEREX INFOTECH LTD.-H.O. PVT.	
C.A Madhuri Sakhaika	Sakhaika & Associates	Partner	--	Nitesh	EVEREX INFOTECH LTD.-H.O. PVT.	
C.A Sanjay Dagia	Dagia Associates	--	--	Pradnya	EVEREX INFOTECH LTD.-H.O. PVT.	
C.A Sanjay jain	J JAIN & CO	--	--	Pradnya	EVEREX INFOTECH LTD.-H.O. PVT.	
C.A SUJEET R SHUKLA	S R SHUKLA & ASSOCIATES	Partner	--	Nitesh	EVEREX INFOTECH LTD.-H.O. PVT.	
C.A Swapnil Modi	G R Modi & Co.	Partner	--	Nitesh	EVEREX INFOTECH LTD.-H.O. PVT.	

Product	Description	Type	Category	Sub-Category	UDF
KDOCPlus - Server		Software	Software	WEB APPLICATION	
Sky ERP - GST Plus		Software	Software	WEB APPLICATION	
SKY Export Plus		Software	Software	Desktop Application	
Wisetrack - PRO		Software	Software	Desktop Application	
SKY ERP - HRM Plus		Software	Software	WEB APPLICATION	
KDOC - Document Management Software		Software	Software	Desktop Application	
Sales Lead Tracker	LAN - Desktop Base - Lead Management Software	Software	--	--	
Sales Lead Tracker Plus		Software	Software	WEB APPLICATION	
SKY ERP Export Plus		Software	Software	WEB APPLICATION	
eSecretary		Software	Software	Desktop Application	



Accounts Management

- **Accounts Activity:** Effortlessly manage and track sales activity with the lead
- **Data Accessibility:** Provides a secure, faster, and reliable data access mechanism to navigate various details of the client.

Account Name	City	Country	Phone No.	Mobile	E-Mail	Created By	Account Manager	Company-Branch	UDF
MITTALAAL LALAH & SONS	Chennai	India		91-7804821560,91-	qaq@lalahs.com	vineet	MAYANK PAREKH	EVEREX INFOTECH PVT. LTD.-H.O.	
AL GHIZA EXPORTS	Noida	India		91-9358202627	danishhayatadvocate@gmail.com	dashrath	DASHRATH CHAUDHARY	EVEREX INFOTECH PVT. LTD.-H.O.	
BHARATI AHS POWERTECH PVT.LTD	Nashik	India		91-099607 23111	bharatish@gmail.com	rahul	Rahul Mohandas	EVEREX INFOTECH PVT. LTD.-H.O.	
BNI LABORATORIES PRIVATE LIMITED	Nashik	India		91-9372074014	sonametal@rediffmail.com	rahul	Rahul Mohandas	EVEREX INFOTECH PVT. LTD.-H.O.	
RAINBOW EXPORT	Kolkata	India		91-9434251148	rice.rainbowexport@gmail.com	dashrath	DASHRATH CHAUDHARY	EVEREX INFOTECH PVT. LTD.-H.O.	
ROHIT ENT	Siliguri	India		91-9832584604	aganwalharishchandra@gmail.com	dashrath	DASHRATH CHAUDHARY	EVEREX INFOTECH PVT. LTD.-H.O.	

Target Management

- **Target Setting:** Allows to create and assign targets for the team members on a daily and monthly basis.
- **Target Creation:** The target can be set in numbers or percentages.
- **Activity Tracking:** Easy to track the real-time status of team members' activity, whether their work is progressing towards achieving the target or not.

Activity Assigned

Activity Type: Call

Search Party: Mr Anil (All Time Plastics Pvt Ltd)

Leads: All Time Plastics Pvt Ltd

Call With: Mr Anil, Mr Nilesh Shah, Mr Rajiv Rajda

For/Subject: CALL FOR INACTIVE TO ACTIVE & kdocplus demo

Next Date-Time: 15/05/2024, 03:57 PM

Concluded/Discussed: [Empty]

Notes: [Empty]

Status: Assigned, Priority: Medium

Close Reason: [Empty]

Product List: [Empty]

Activity Management

- **Task Assigning:** Allows to assign various marketing activities such as telemarketing, product demonstration, meetings, and so on.
- **Real-time Tracking:** Easily navigates the activity with details such as actual activity date and time, purpose, subject, party name, status, priority, assign to, assign by, activity creation date & time,
- **Missed Follow-up:** Facilitates a checklist of missed follow-ups related to various activities.

Calendar

- **Functionality:** Schedule appointments and other marketing activities on a daily, weekly, or monthly basis. Helps to manage campaigns and tours.
- **Activity Analysis:** This makes it easy to track and analyze activities by selecting specific dates.
- **Follow-up:** Manage follow-ups effortlessly, arranged by date.

Marketing->Transactions->Calendar

today May 2024 month week day

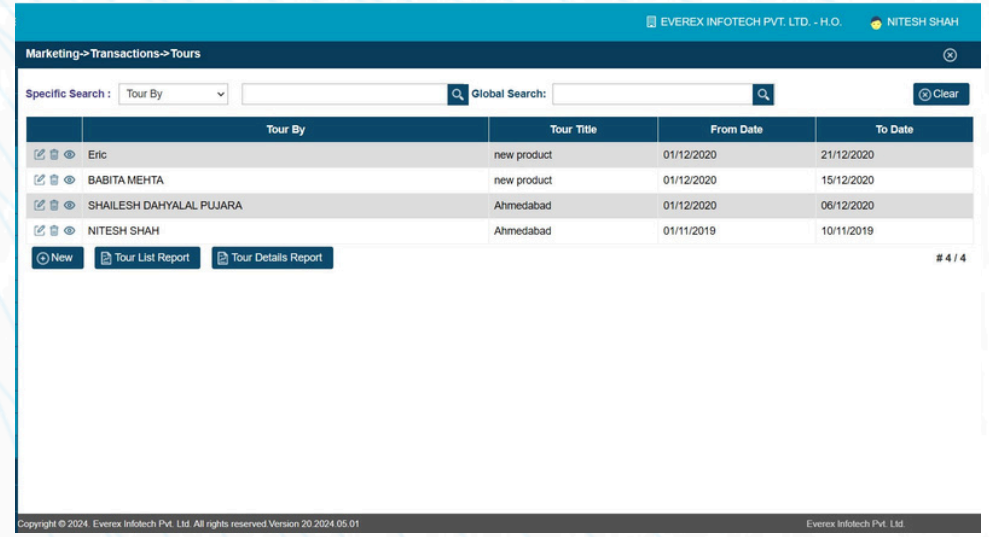
W	Sun	Mon	Tue	Wed	Thu	Fri	Sat
18	28	29	30 1:26p Call : Jam D 2:15p Call : JNSV	1	2	3	4
19	5	6	7	8	9	10	11
20	12	13	14	15 1:01p Call : RAMES 1:39p Call : ANIL B 3:57p Call : All Tim	16 12:58p Call : Shah 3:36p Call : J.H.Ga 4:17p Call : POWE 4:19p Call : Speed	17 3:46p Call : Sunj f 4:30p Call : The M 4:59p Call : Padma +2 more	18
21	19 12:19p Call : Delhi 5:16p Call : Multir	20 3:31p Call : Ion Ex 4:07p Call : Tru-Fil 5:10p Call : A.R.So 5:22p Call : Global	21	22	23 3:14p Call : Chinut	24 1:22p Call : V.D.A 5:47p Call : Cresce	25
22	26 1:28p Call : Resnox	27 3:55p Call : Allied 4:12p Call : Bharat 5:16p Call : 18tram	28 12:03p Call : Alcor 12:37p Call : TEEA 1:04p Call : Logis	29	30 2:44p Call : CHICA	31	1

Campaign Management

- **Scheduling:** Offers a distinct ability to schedule and manage online campaigns effectively. Allows to conduct telemarketing.
- **Communication:** Facilitates schedule-wise bulk email sending with 'Outlook' support.
- **Email Status Checking:** Email status checking provision for checked or unchecked. Enables tracking the exact number of times the email goes to view.

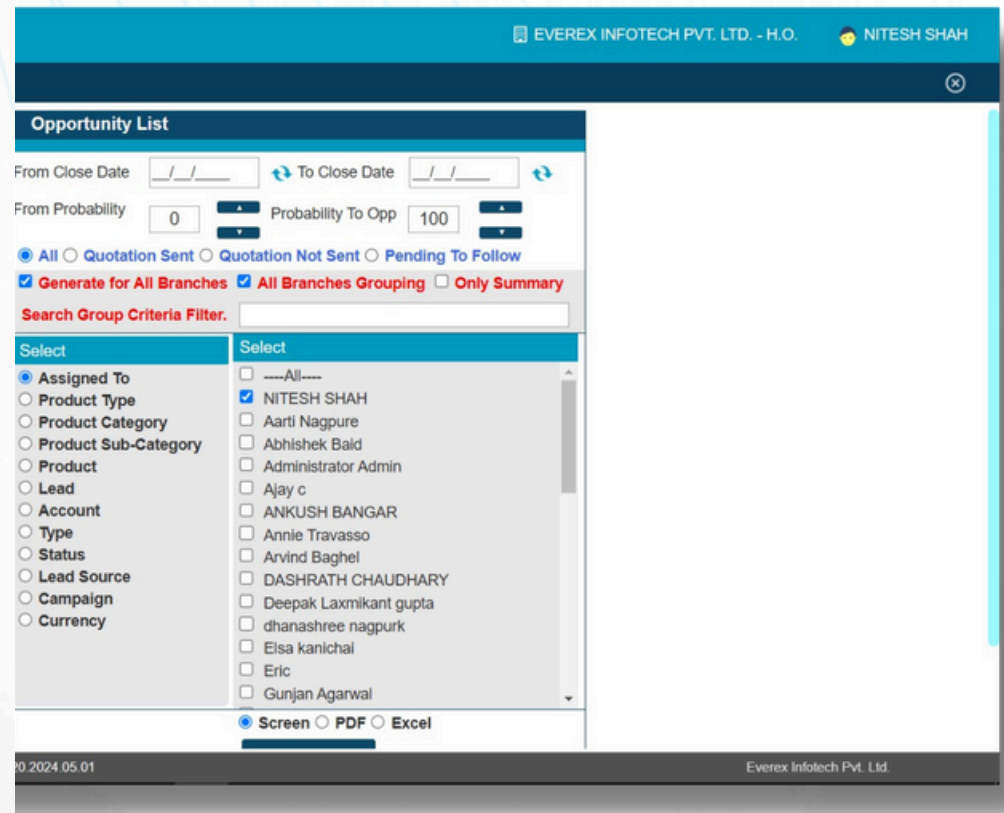
Tour Management

- **Tour Assignment:** Easily assign tours to multiple team members.
- **Location Selection:** Facilitates location-wise tour allocation such as within a city, national, or international.
- **Tour Data Management:** Allows to insertion of details such as tour assigning person name, tour title, start date, end date, party name, meeting start time, meet end time, total meeting time, product name, and comments.
- **Activity Tracking:** Tracks marketing and lead generation activities during the tour.



Opportunity Management

- **Data Auto-fetching:** Enables the creation of an opportunity by automatically retrieving client information from leads.
- **Product-wise Opportunity Creation:** Ensures various businesses create an opportunity according to their products. Streamlines different marketing activities.
- **Rapid Response to Demands:** The opportunity module helps to create a quotation rapidly according to the client's demands and streamlines the sales funnel



Quotation Management

- **Hassle-free Quotation Creation:** Easily create a quotation with the addition of basic details, product details, tax details, terms and conditions details. Facilitates setting of industry-wise quotation validity.
- **Basic Details:** Data Auto-fetching for quotation number, contact person name, party name, and address. Options to insert details like currency, payment type, tax structure, and date. Offers to choose the desired currency from multiple currency options.
- **Product Details:** Data auto-fetching mechanism to add product details like product type and HSN code. Allows to insert other details such as packing type, unit, quantity, rate, discount, and tax. Offers to reflect advance payment in a quotation.
- **Tax Details:** The system enables a predefined tax structure to generate appropriate quotations. Easily can set discounts and finalize product amounts.
- **Terms & Conditions Details:** Provision to create and add Industry-wise terms and conditions details in quotation. Enables to make terms group.
- **Quotation Revision:** Provision to revise quotation multiple times.

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EVEREX INFOTECH PVT. LTD. - ALL BRANCHES

ASSIGNED TO-WISE (ALL STAGES) OPPORTUNITY LIST REPORT HAVING ALL STATUS (BRANCH-WISE GROUPING) AS ON : 15/05/2024

SrNo	Creation Date	Created By	Exp Cl. Date	Related	Lead/AC Name	Lead Source	Assigned To	Campaign	Opp. Type	Product	Category	Sub-Category	Type	Close Qty.	Close Rate	Close Amt.	Cur
1	06/04/2019	admin	06/04/2019	Account	Space Office Systems P. Ltd.	Existing Customer	NITESH SHAH			KDOCPlus - Server	Software	WEB APPLICATION	Software	2,000	85000.00	170000.00	INR
2	23/07/2019	admin	07/08/2019	Lead	DESAI SAKSENA & ASSOCIATES	Directory	NITESH SHAH			KDOC - Document Management Software	Software	Desktop Application	Software	0.000	0.00	0.00	
3	16/09/2019	Nitesh	31/10/2019	Lead	MulUrban Infra Services Pvt Ltd	Inbound call	NITESH SHAH		New Business	KDOC - Document Management Software	Software	Desktop Application	Software	1,000	35000.00	35000.00	RS.
4	11/10/2019	Nitesh	31/10/2019	Lead	Challaram Shipping Pvt Ltd	Inactive Customer	NITESH SHAH		New Business	KDOCPlus - Server	Software	WEB APPLICATION	Software	10,000	85000.00	850000.00	RS.
5	14/10/2019	Nitesh	14/10/2019	Lead	S. K. Singh & Co.	Panther Technologies	NITESH SHAH		New Business	KDOCPlus - Additional User	Software	WEB APPLICATION	Software	25,000	7500.00	187500.00	RS.
6	06/11/2019	Nitesh	08/11/2019	Account	Precise Chempharma Pvt Ltd - Vidhyawhar Div. AC	Existing Customer	NITESH SHAH		New Business	KDOCPlus - Server	Software	WEB APPLICATION	Software	1,000	20000.00	20000.00	RS.
7	09/01/2020	Nitesh	09/01/2020	Lead	Existing Customer Sales Stimulator	Existing Customer	NITESH SHAH		New Business	Watrack - PRO	Software	Desktop Application	Software	1,000	35000.00	35000.00	
8	30/01/2020	Nitesh	30/01/2020	Lead	Robinsons Cargo & Logistics Pvt Ltd.	Existing Customer	NITESH SHAH		New Business	KDOCPlus - Additional User	Software	WEB APPLICATION	Software	1,000	7500.00	7500.00	RS.
9	16/04/2020	Nitesh	16/05/2020	Account	Prism Calibration	Existing Customer	NITESH SHAH		New Business	KDOCPlus - Server	Software	WEB APPLICATION	Software	1,000	85000.00	85000.00	RS.
									New Business	KDOCPlus - Additional User	Software	WEB APPLICATION	Software	1,000	7500.00	7500.00	RS.

- **Quotation Sending:** Allows product image attachment in a quotation. Outlook email support to send a quotation. Can add or attach a quotation in the email.
- **Sales Funnel Analysis:** Analyze and ensure the available sales funnel through the exact number of quotations. Simplifies the analysis of the efficiency of quotations through comparison with the exact number of order conversions

Sales Order Management

- **Agile Functionality:** Ensures the release of accurate sales orders by referencing approved client quotations automatically.
- **Overcomes Human Error:** Auto-data fetching mechanism enables insertion of product name, price, quantity, and other details precisely in sales orders.

Order No.	Order Date	Party	Total Amount	Comp-Branch
EIPL00015	01/02/2024	S R SHUKLA & ASSOCIATES	188800.00	EVEREX INFOTECH PVT. LTD. - H.O.
EIPL00014	27/12/2023	Art Yam Exports	177000.00	EVEREX INFOTECH PVT. LTD. - H.O.
EIPL00013	06/12/2023	Mesco Springs	84960.00	EVEREX INFOTECH PVT. LTD. - H.O.
EIPL00012	04/08/2023	Bhavi International Pvt Ltd	118000.00	EVEREX INFOTECH PVT. LTD. - H.O.
EIPL00010	13/06/2022	Sanjyot Metal Industries	194700.00	EVEREX INFOTECH PVT. LTD. - H.O.
EIPL00009	14/02/2022	Vital Healthcare Pvt.Ltd	56640.00	EVEREX INFOTECH PVT. LTD. - H.O.
EIPL00008	12/04/2020	NEEL SINDHU INDUSTRIES	200600.00	EVEREX INFOTECH PVT. LTD. - H.O.

Pro Forma Invoice Management

- **Effortless Data Navigation:** Generates a pro forma invoice by automatically fetching the necessary data with the reference of a quotation.
- **Modification:** Easily modify pro forma invoice with required changes

Sr. No.	Particular	HSN	Unit	Qty	Rate	Amount
1	SPUNBOND BICO HYDROPHILIC UV : PP NONWOVEN FABRIC : --	54079200	Rolls	150.00	150.00	22,500.00

Report Management

- **Variety of Reports Facilitation:** Generate various types of reports including lead, account, opportunity, activity, missed follow-up, target in numbers, target in amounts,
- **Lead Report:** Generate a report including the start date, to-date, lead manager, country, city, state, product, and so on. The report reflects lead generation in numbers for the specific lead manager.
- **Account Report:** Easy to check the number of accounts created by a specific account manager.
- **Opportunity Report:** Analyse number of opportunities created by a specific member from the start date to the close date. Obtain filter-wise opportunity reports as won, lost, or in the pipeline. It's easy to check the status of quotations as sent, unsent, and pending follow-up.
- **User Defined Alerts:** Set defined alerts like missed follow up, to do list, target details etc.

Sr. No.	Particular	HSN	Unit	Qty	Rate	Amount
1	Additional Company creation : Software : WEB APPLICATION	998313	CM	40.00	30.00	1,200.00
2	Additional User : -- : --	85238020	CM	50.00	30.00	1,500.00

- **Activity Report:** The system offers activity reports in two types such as completed and missed follow-up. Can create reports for missed follow-ups related to leads and accounts. Provision of hassle-free completed activity report generation.
- **Quotation Report:** System-generated quotation reports help to check available funnel size.
- **Target Report:** Target in numbers and target in amounts reports facilitation, which helps to analyze the actual target status and efforts of a specific team member.
- **MIS Report:** As a centralized system for managing and tracking sales leads and marketing activities, the system offers to generate MIS reports for better analysis purposes.
- **Auto Push of Reports:** Allows users to automatically send customized reports to their inbox or team members at set intervals.

Sr. No.	Creation Date	Lead Name	Lead Manager	Rank	Type	Sub Type	Industry Type	Lead Source	Address Type	Origin	Address	City	Mo
1	22/04/2019	shubh	Administrator Admin	--	--	--	--	Word of Mouth	Office	Meeting		Mumbai	--
2	06/04/2020	lead888	Administrator Admin	A+	Government	Equipment	Aluminium Manufacturing (Die Casting Mfg)	Office	Office			Villapuri Gul	Wa
3	03/08/2023	Check Opportunity by Administrator	Administrator Admin	A	--	--	--	Office	Office			Haggur	Ha
4	05/08/2023	Test - abc	Administrator Admin	A	Acute course	Hospital	Electronics	Office	Office			Mumbai	Ha
5	20/03/2024	Mult - Trip Course	Administrator Admin	--	MANUFACTURER	healthcare	Paint	Cold Call	Office				Ha
6	04/04/2024	Testing read	Administrator Admin	B	Government	--	--	Office	Office			Pune Cantonment	Ha
6	LEAD MANAGER : ADMINISTRATOR ADMIN TOTAL												
6	BRANCH : H.O. TOTAL												

About Company

Everex Infotech is customer-centric and aims to provide technology with comprehensive solutions to simplify your IT environment, overcome your business challenges, increase your sales, maximize returns, and achieve your goals.

We at **Everex Infotech**, endeavour to provide a cost-effective delivery methodology while focusing on quality standards, exceeding user expectations and creating an extraordinary business environment for both employees and end customers.

Our Other Products & Services

- Sky ERP GST Plus
- Sky ERP GST Plus with Financial Accounting
- Sky ERP Export Plus
- KDOC Plus
- E Secretary
- Wise Track
- Tele Check
- Website Design & Development
- Graphic Design
- Digital Marketing
- IT Infrastructure

We aspire your association

“A business that consistently enriches lives is a wealthy business”

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