



MAXIMISE CONVERSIONS & POWER UP YOUR PIPELINE

EFFORTLESS LEAD & SALES MANAGEMENT

Capture leads, nurture relationships, and close faster with a unified CRM tool.

Sales Lead Tracker 



Why choose Sales Lead Tracker?

The Smart Choice for Smart Sales.

Empower your sales team with a smart, scalable and user-friendly CRM solution designed for modern businesses. From automation and mobile access to deep analytics and seamless integrations, our platform delivers everything you need to convert lead faster and grow smarter.



Centralized Lead Management

Easily capture, assign, and track leads from multiple sources. Streamline follow-ups and boost conversion rates with intelligent lead prioritization.

Efficient Quotation & Sales Order Handling

Create professional quotations and convert them into sales orders seamlessly. Built-in tracking and revision history ensure better control and faster client approvals.

Real-Time Insights & Reporting

Get actionable insights with detailed dashboards and reports. Monitor team performance, campaign effectiveness, and sales trends to make informed business decisions.

Automated Task & Activity Tracking

Never miss a follow-up. Automate tasks, receive timely reminders, and manage all sales activities efficiently to stay on top of your pipeline.

Scalable Cloud-Based Solution

Access your CRM anytime, anywhere with secure cloud hosting. Whether you're a start-up or an enterprise, the system grows with your business needs.

Integrated Marketing & Campaign Tools

Plan and manage campaigns, segment contacts, and track engagement metrics—all from within the CRM. Drive more qualified leads and improve marketing ROI.

Feature Overview



Contact Management



Product Management



Document Management



Marketing Management



Lead Management



Target Management



Activities Management



Campaign Management



Tour Management



Quotation Management



Sales Order Management



Proforma Management

Core Features



Dashboard

- **Centralized Access** - Centralized and visually engaging hub to access key information and metrics.



Contact Management

- **Quick Contact** - Capture and manage contact information efficiently.
- **Contact Details** - Store key data: name, type, industry, source and lead manager along with statutory information.



Product Management

- **Product Name and Details** - Organize parent products with industry and service specific information such as name, category, and type.
- **HSN/SAC Code Integration** - Easily incorporate HSN/SAC codes for precise product identification.
- **Packaging Details** - Store details of product packaging like type of packaging and packaging weight for accurate quotation.



Document Management

- **Email Templates** - Save multiple templates and customize them instantly with client information.
- **Document Attachment** - Easily attach documents to enhance collaboration and accessibility.



Sales Lead Management

- **Lead Management** - Capture, organize, and track leads in one centralized system for faster follow-ups, improved conversions and future prediction.
- **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.

Core Features



Target Management

- **Target Creation** - Allows to create and assign targets for the team members in number or percentage.
- **Activity Tracking** - Easy to track the real-time status of team members' activity, whether they are progressing towards achieving the target.



Activity Management

- **Task Assigning** - Allows to assign various marketing activities such as telemarketing, product demonstrations, 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.



Campaign Management

- **Campaign Scheduling** - Offers a distinct ability to schedule and manage online campaigns effectively.



Calendar

- **Functionality** - Schedule appointments and other marketing activities on a daily, weekly, or monthly basis. Helps track and analyze activities
- **Follow-up** - Manage and arrange follow-ups effortlessly by date.



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.
- **Activity Tracking** - Tracks and capture 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.

Core Features



Quotation Management

- **Hassle-free Quotation Creation** – Create quotations quickly with basic, product, tax, and T&C details. Supports industry-wise quotation validity.
- **Basic Details** – Auto-fetch quotation number, contact person, party name, and address. Add currency, payment type, tax, and date. Choose from multiple currencies.
- **Product Details** – Auto-fetch product type and HSN code. Add packing type, unit, quantity, rate, discount, tax, and advance payment.
- **Tax Details** – Use predefined tax structures for accurate quotations. Easily set discounts and final amounts.
- **Sales Funnel Analysis** – Track sales funnel with quotation counts. Compare quotations vs. order conversions for efficiency.
- **Discount on Variance** - Apply flexible discount on price variations with controlled approvals, ensuring profitability while closing deals faster.
- **Revision of Quotation** - Easily modify and resend quotations with full version tracking, ensuring accuracy throughout the sales cycle.
- **Line Item-wise Control** - Manage pricing, quantity, and discount at an individual item level for precise and transparent quotations.



Sales Order Management

- **Smart Functionality** – Automatically creates sales orders using approved quotations, saving time and effort.
- **Reduces Human Error** – Fills in product details, prices, and quantities to avoid manual mistakes.



Proforma Management

- **Effortless Data Navigation** - Generates a pro forma invoice by automatically fetching the necessary data with the reference of a quotation.



Core Features



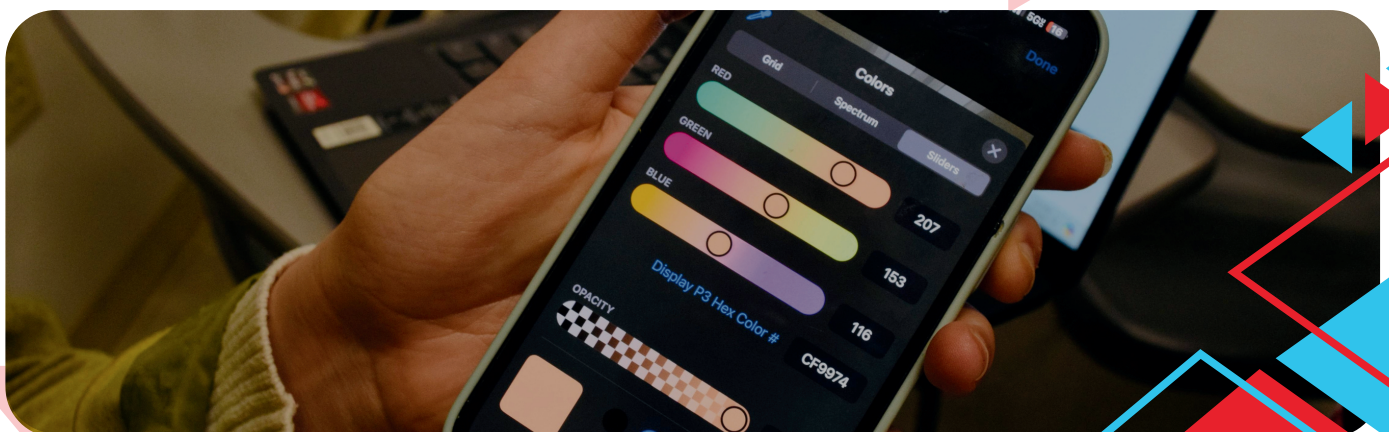
Report Management

- **Lead Report** – View leads by date range, manager, location, product, etc., showing lead counts per manager.
- **Account Report** – Check how many accounts each manager has created.
- **Opportunity Report** – Track opportunities by member from start to close date. Filter by won, lost, pipeline, and view quotation status.
- **User Defined Alerts** – Set alerts for missed follow-ups, to-do lists, targets, and more.
- **Activity Report** – Generate completed or missed follow-up activity reports for leads and accounts.
- **Quotation Report** – Access system-generated reports to view funnel size.
- **Target Report** – Get targets in numbers and amounts to analyze team performance.
- **MIS Report** – Generate MIS reports for overall sales and marketing analysis.
- **Auto Push Reports** – Automatically send customized reports to your inbox or team at scheduled intervals.



Mobile App

- **Quick Contact Management** – Add client contact details anytime, anywhere.
- **Activity Management** – Record client information anytime, anywhere.
- **Quotation Management** - View, edit and print quotation on the go.
- **Target Management** – Track targets assigned by managers in real time.
- **Lead Management** – Access leads information in just a few clicks.
- **Funnel Management** – See each client's stage in sales funnel by products.
- **Tour Management** – Plan and track sales tours efficiently.
- **Calendar Management** – View scheduled meetings and visits on the go.
- **Report Management** – View and download lead, quotation, activity and target reports.



OVERCOMING LEAD MANAGEMENT CHALLENGES WITH SALES LEAD TRACKER

CHALLENGES	SOLUTIONS
Scattered lead data across a spreadsheet.	Centralized database for storing and accessing all leads in one place.
Missed follow-ups and delayed response.	Automated reminder and follow-ups scheduling.
Lack visibility into the sales funnel.	Real-time dashboards with funnel and pipeline tracking.
Manual lead entry is time consuming and error prone.	Quick lead capture and auto-data fetching tools.
Lack of automation in managing leads manually.	Embrace automation with Sales Lead Tracker, minimizing manual efforts and maximizing efficiency in lead management.
Poor team collaboration and communication gaps.	Shared access, activity logs, and internal communication features.
Difficulty in tracking campaign performance.	Integrated campaign management and mass mailing with analytics.
No standard process for assigning or escalating leads.	Lead routing, escalation workflows, and user role.
Inconsistent reporting and lack insights.	Customizable, auto-generated reports for leads, activities, and conversions.

About Company

Everex Infotech is customercentric 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”

Reg. Office

- 26, Champa Gully, M. J. Market Lane, Mumbai – 400002. INDIA
- +91-22-4226 4444
- +91-81-0434 5257
- info@everexinfotech.com
- www.everexinfotech.com

