

Task of the day

New web lead

~~need more info~~
waiting for Response

~~let sent~~
opportunity made

case open

~~handover done~~

close close



need more info

All document received

service

~~document list sent~~

full payment received

case submitted

file close → waiting for High commission Response

Stage 1

Stage 2

Stage 3

New web lead
waiting for Response
opportunity made
~~case~~ case close

case open
~~handover done~~
~~need more info~~
~~handover done~~
Handover done

~~need more info~~
all document received
full payment received
case submitted

stage 4
file close
waiting for

conclusion

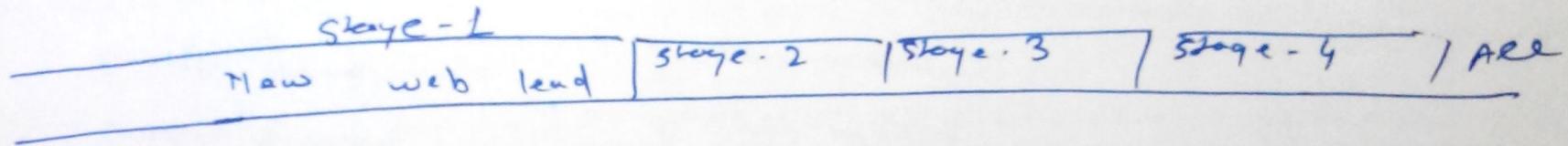
freq. ABC

Task of the day

create
New word

- How web land
- waiting for response
- opportunity made
- some open

Lead Management



assign to	Name	Type	Remark
Branch <input type="text"/>	Ram chandra	CAD - PR	→
DAP <input type="text"/>	Shantamu kumar	DEM - SR	
Name <input type="text"/>	Shyam chandra	AUS - PR	
	Gobhara kanyap	NLR - WP	
	Rakesh Parikshit	CAD - UT	

condition - Normal as New *

* - if close lead
Lead will assign in new lead column.

Account

—
—
—

Branch
Dep.
~~all~~
all

~~clients~~ consultant

Home

invoice ~~sent~~ quote

Payment Received

Service Tax

Balance amount -

Payment Not Received

commission made

commission issue

This week

This month

from

To

office Exp.

→

—

Branch

Petty cash

Rent

Internet

Electricity

Phone Bill

Printing Exp.

other

Client Login Panel

Profile

curr details

invoice

inbox

Document check list

write to us

Account

1.

2.

3.

4.

5.

6.

upload

~~important msg~~

important msg.

Next Payment date

admin panel

access type

- consultant
- service
- mktg
- Accountant

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|
└

segment

- Lead management ✓
- Account
- Report
 - Lead ✓
- client
- HR