REFERRAL MANAGEMENT SYSTEM

User Manual

1. Login

1.1. Login to the Application-

1.1.1. Enter Login Id the email ID.

1.1.2. Password

1.1.3. Facilities

1.1.3.1. Change Password - facility to change the password

1.1.3.2. Forgot Password - facility to create the new password

2. Dashboard

2.1. This is the primary screen of the software which is known as dashboard. This screen gives you the overall working and the status of the leads and other features and facilities to manage the lead process.

2.2. Four Main tabs and their features.

2.2.1. Contact Required - this tabs shows us the contact required for the business.

2.2.2. Referral Partners - are the contacts through which we get the business and are the active referrals for our business.

2.2.3. Vendors - Are the contacts apart of the leads contacts.

2.2.4. Active leads - Are the active leads which are "In Progress" status.

2.2.5. Pending Tasks - These are the pending tasks of the user which are needed to be worked on. This tab is displayed with following two type of pending task.

2.2.5.1. Today's Pending Task

2.2.5.2. Total Pending Task

3. Set up

3.1. Update Company - Manage Company details here. (Allowed only for Superuser).

3.2. Email Signature - Super user can manage the Company Logo.

3.2.1. Manage Email Id, Password, Email Signature. This is a one time activity and can be updated at the later stage.

3.3. Invoices - Invoices will be the PDF invoices which are automatically generated by the system after the auto payment of the client via Credit Card according to the subscription type enrolled by the client. (Viewable only by Superuser).

4. Masters (Only for Superuser)

4.1. Users - Manage users according to the subscription.

4.2. Contact Groups - These are predefined groups which user can classify according to the business needs and can also be added in the later stage.

4.3. Task Type - Manage different Task types. Various task related to the lead can be created.

4.3.1. A Predefined Email template can be attached to the task type to be send if auto send facility is also added to the task type.

4.3.2. Auto add facility is to add the task automatically according to the duration days set in the task type.

5. Contacts

5.1. This screen is to manage the Lead contact details.

5.1.1. Contacts can be added by the Super user and User (Employee).

5.1.2. User can only view the contact details of the lead whose lead or task is assigned to him/her.

6. Lead

6.1. Leads are the business lead to be followed by the user to make it a success. Leads can be created by two ways.

6.1.1. One when you finish creating the new contact.

6.1.2. Two when you view contact which has a button on the right "View Leads" or "Create Lead".

7. Tasks

7.1. Manage Task of the various leads.

7.1.1. Super user can create task and execute the task.

7.1.2. User can create task for his own execution and can create the task for the contacts or leads assigned to employee.

7.1.3. Super user can create Multiple Tasks of one lead and assign it to the multiple users (Employee).

7.1.4. Super user can view all the task of all the users. But user(s) can only view their tasks.

7.1.5. Task can be viewed by using multiple filters like Pending, In Progress, Completed.

8. Emails

8.1. Templates - Super user and user can use the templates but the template creation facility is only given to the Super user.

8.2. Category - Pre-defined categories can be made to create multiple email to be send under a category. For Ex. Business General Emails, Product Emails, Festivals. (Super User has only this facility)

8.3. Compose - The email can be composed and send to a particular lead contact or a group of contacts.

8.4. Sent - This is the list were we can view the email sent by the user.

9. FAQ's

9.1. <u>How to create a Lead?</u>

Ans: Please follow the steps below.

9.1.1. Go to the contacts menu.

9.1.2. One way to create lead is that you are allowed to create a lead at the end of creating a contact.

9.1.3. Second way is to select the view contacts.

9.1.4. It will have a button on the right side of the contacts window name "Create Leads".

9.1.5. You can also create the multiple leads by selecting the button "View Leads"

9.1.6. After that you can see the existing lead and allowed to add a lead by selecting the button "Add Lead".

9.2. <u>How do I have any task auto Added when any lead is added?</u>

Ans: Please follow the steps below.

9.2.1. Go to Master Menu

9.2.2. Select the "Create Task Type".

9.2.3. Enter Description for Task Type.

9.2.4. Select the Email Template (Optional).

9.2.5. Click on the check box for Auto Send = "Yes"

9.2.6. Click on the check box for Add to Existing = "Yes"

9.2.7. Click on the check box for Auto Add = "Yes".

9.2.8. Add the number of day to add auto task from today in duration (In days).

9.2.9. Click on the button "Save Changes".

9.2.10. This will auto add the created task to any lead once it is created.

9.3. <u>How to Create the task.</u>

Ans: Please follow the steps below.

9.3.1. Go to Task Menu.

9.3.2. Enter Task Title

9.3.3. Select Task assigned.

9.3.3.1. Super user can assign task to himself and any user.

9.3.3.2. User can assigned task to himself as the assigned tab will only show the users name.

9.3.3.3. Task Status.

9.3.3.3.1. Pending (When the task is yet to be done and not completed.)

9.3.3.3.2. Completed (Select once the task is completed)

9.3.3.3.3. Unable Fail (Select if the user tries to call the lead several times and unable to contact).

9.3.3.3.4. In Progress (Select if the task process is to be carried out for more hours or whole day like events, training.)

9.3.3.4. Task Type (Type of task to be performed, can select a multiple task at a time depends upon the requirement.)

9.3.3.5. Due Date (Date on which task is to be done)

9.3.3.6. Lead (Select the lead name which is already in drop-down and need to be selected once while creating the task.

9.3.3.7. Priority. (Level of task level).

9.3.3.7.1. High

9.3.3.7.2. Medium

9.3.3.7.3. Low.

9.3.3.8. Remarks (Enter remarks regarding the task.)

9.4. <u>What are the various Lead Status, what are its meaning?</u>

Ans: Following are the meaning of various leads.

9.4.1. There are 5 type of Leads Status.

9.4.1.1. Junk Lead - The lead which is not for our business.

9.4.1.2. Contact in Future - Lead cant be contacted and worked on currently by can be contacted in future date.

9.4.1.3. Lost Lead - Lead which cant be capitalised and finalised.

9.4.1.4. Closed - Lead which is closed successfully.

9.4.1.5. In Progress - Lead is currently in the process of closing.

9.5. <u>How do I change the lead status?</u>

9.5.1. Ans: Please follow the Steps Below.

9.5.1.1. Click on the Lead Menu.

9.5.1.2. Click on the lead of which you want to change the status.

9.5.1.3. Click on the drop down of Lead Status.

9.5.1.4. Select the lead status.

9.5.1.5. Click on the "Update" button on the top right of the screen.