LEAD VICTOR
Track ▶ Convert ▶ Grow

thinkinno
technologies pvt. ltd.

# Referral Management System.

**Start Up and a Step by Step Reference Manual**

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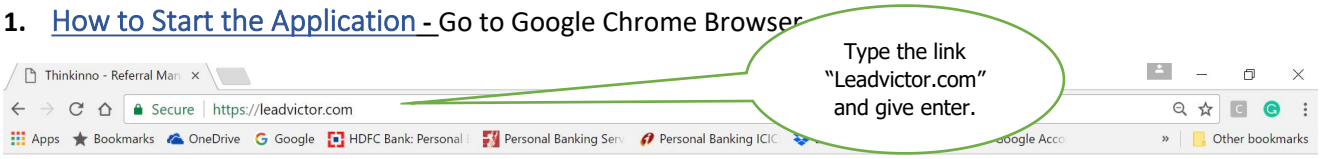
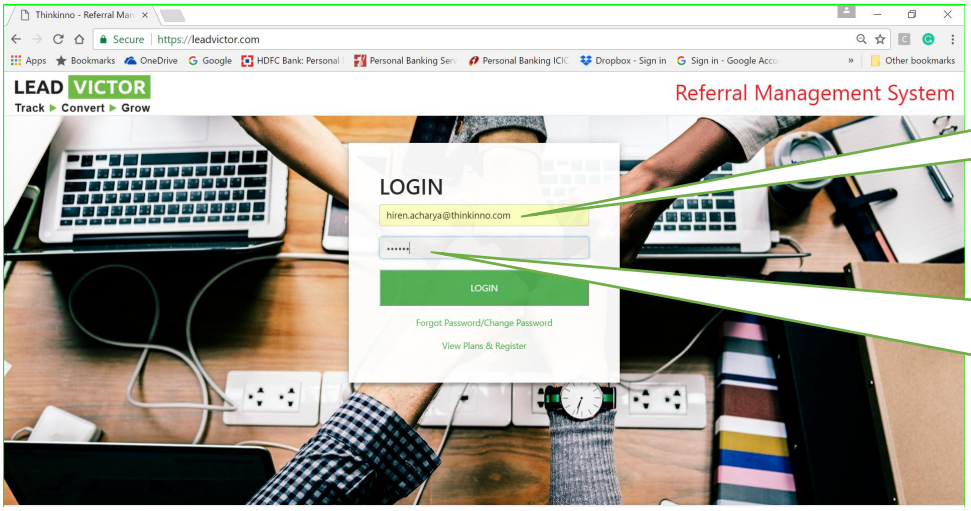
1. How to Start the Application - Go to Google Chrome Browser

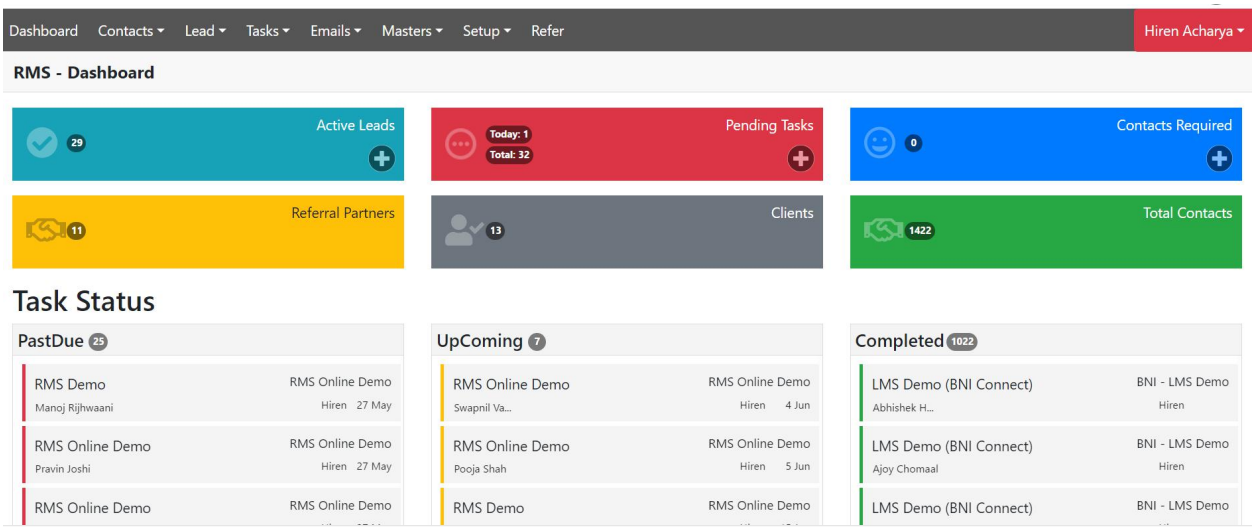


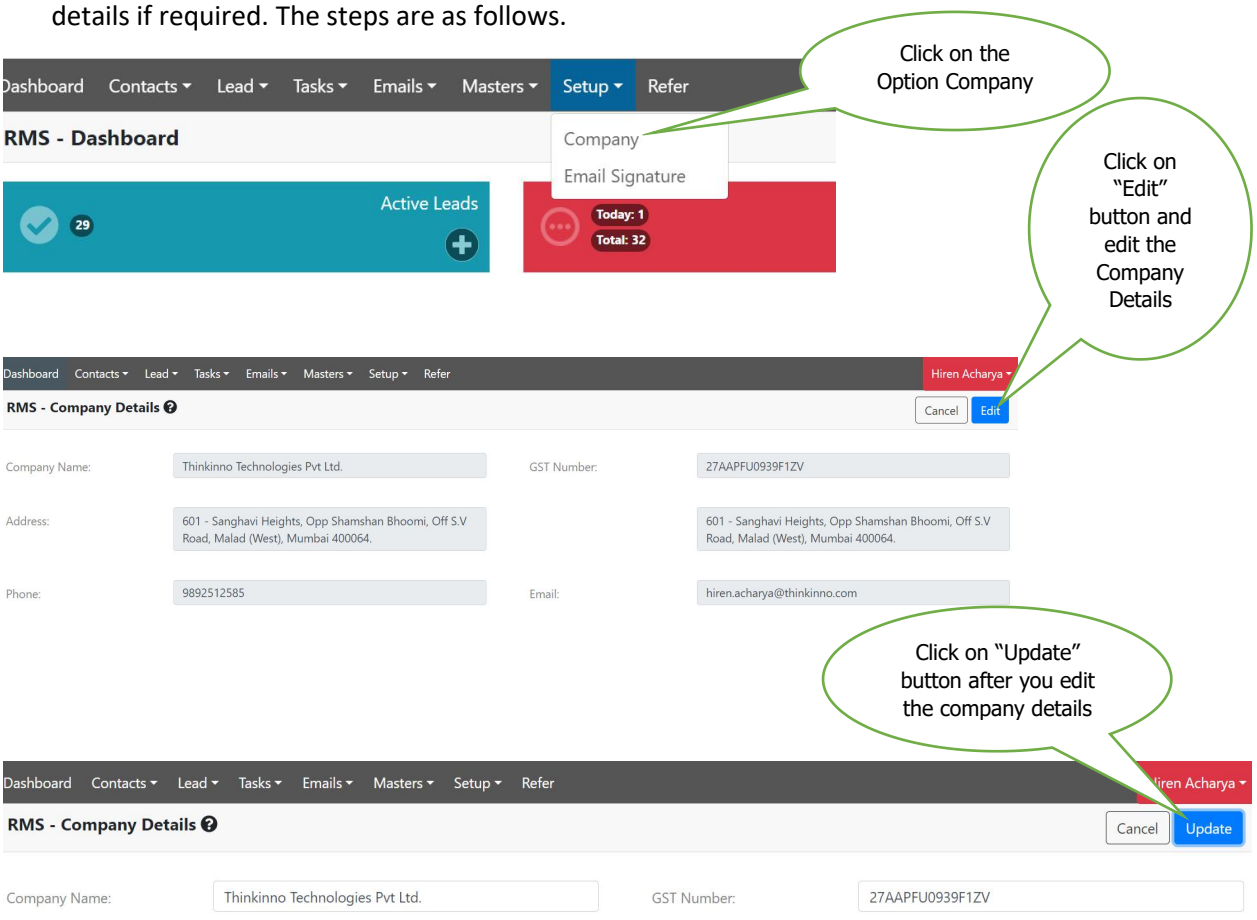

Enter your login ID possibly your Email ID.

Type in the password provided in the email by Thinkinno Technologies.

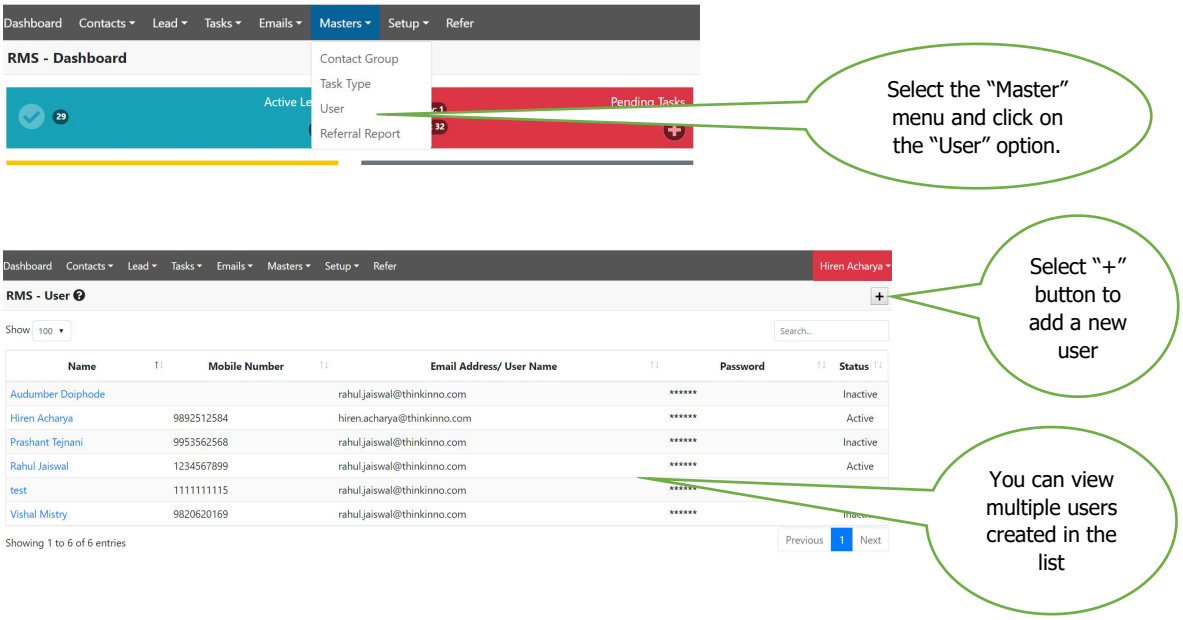
2. Viewing the Dashboard of Application. – Once you successfully login you can see the Dashboard screen as follows.



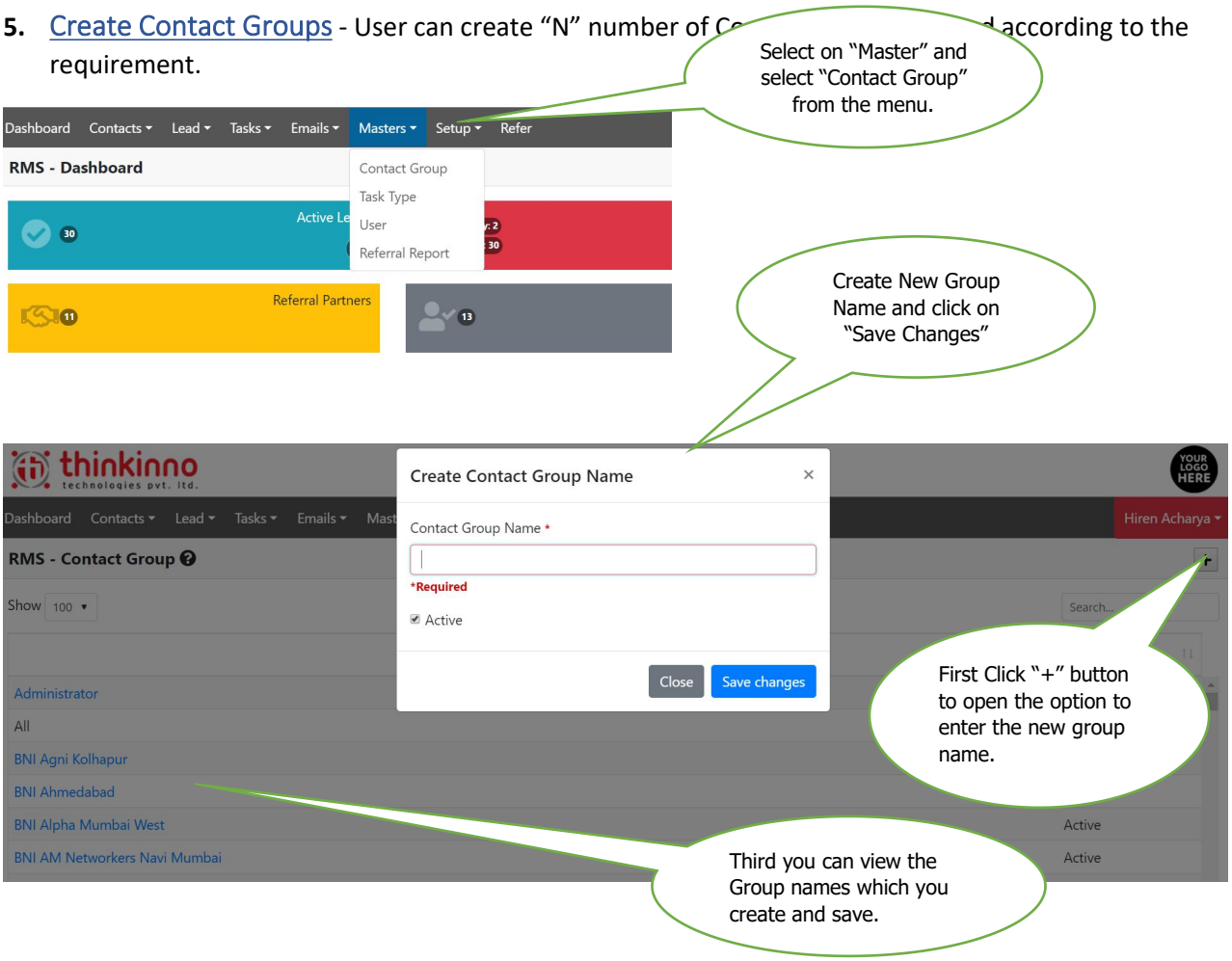
**3.** Check your Company Details – Check-up the company details of the Company. Edit and update the details if required. The steps are as follows.



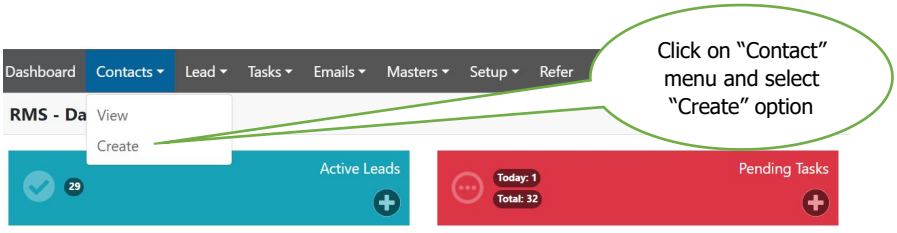

**4.** Add Users to the Application – Add multiple users to your Application by the following steps

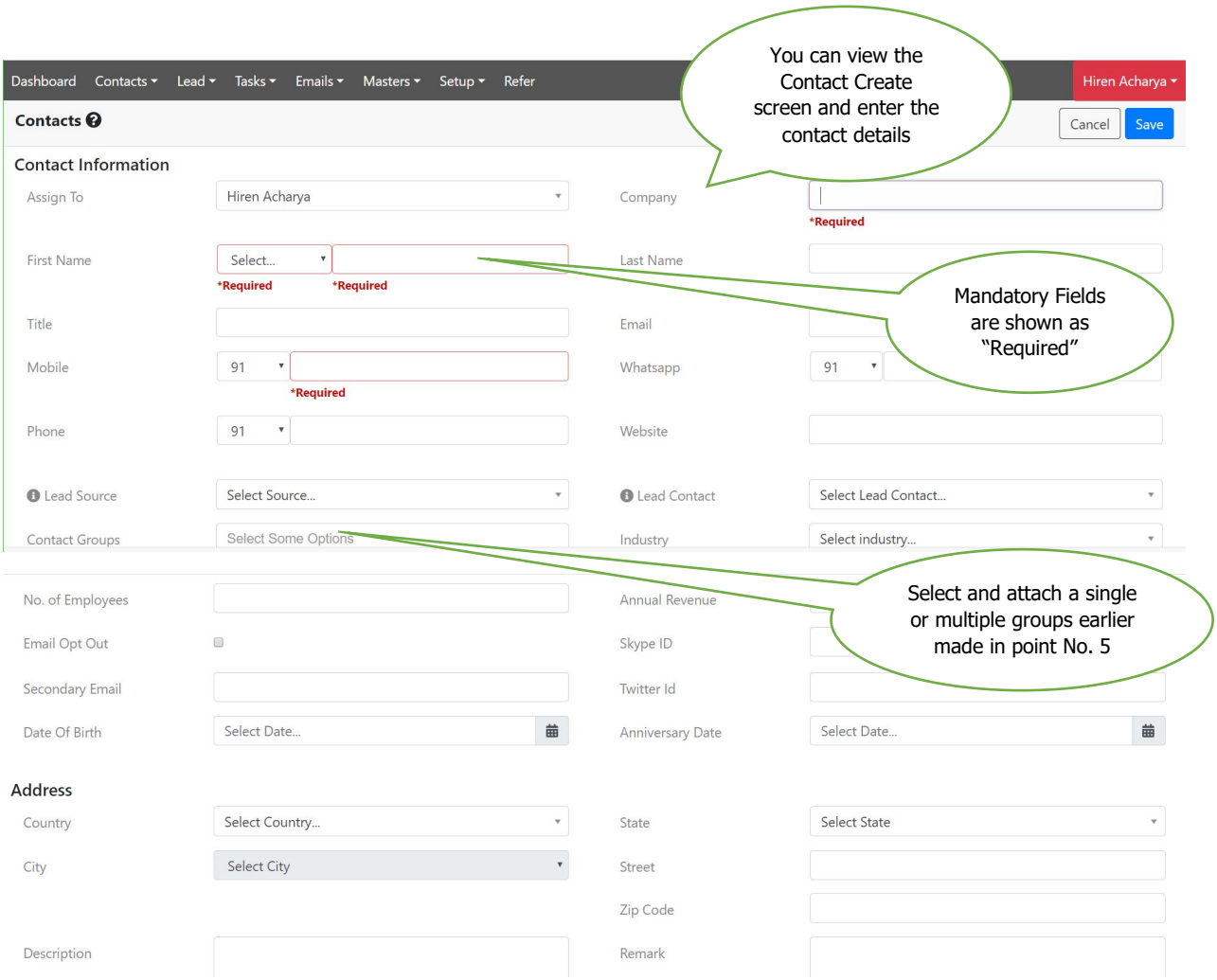


**5.** Create Contact Groups - User can create "N" number of Co d according to the requirement.

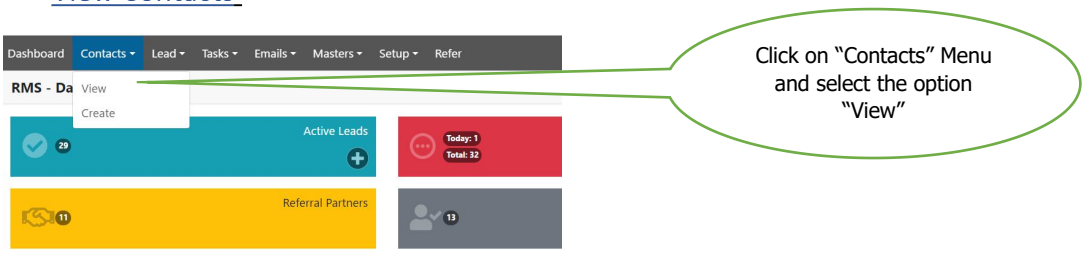


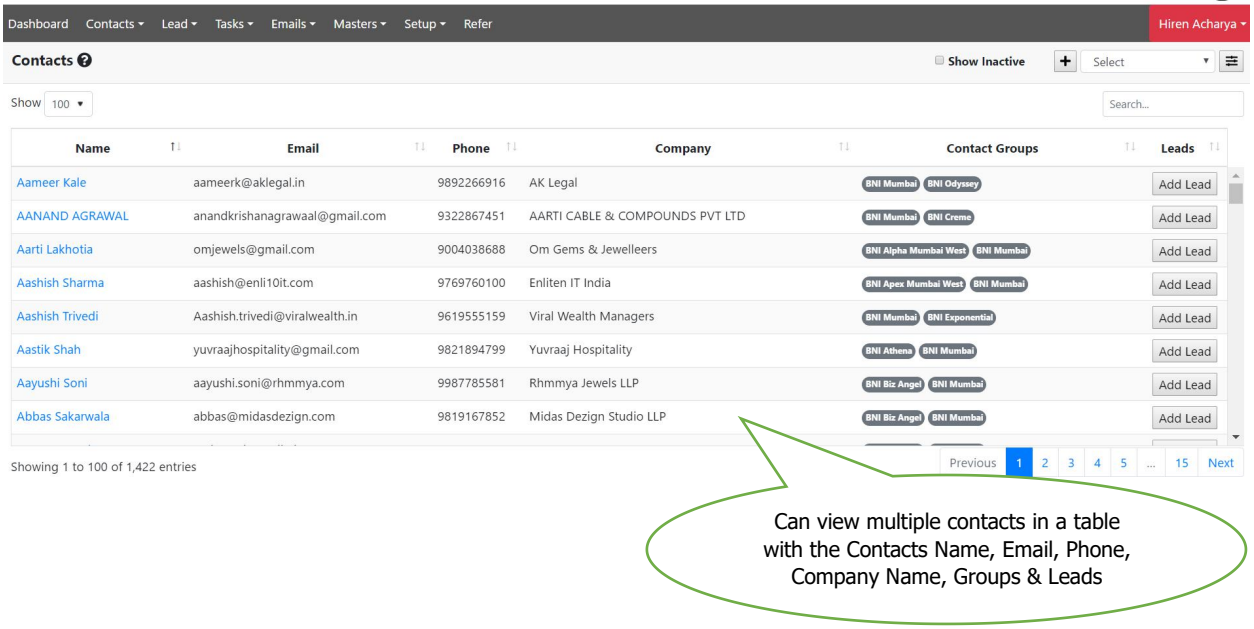

**6.** Create Contact – Create a first contact by the following steps.



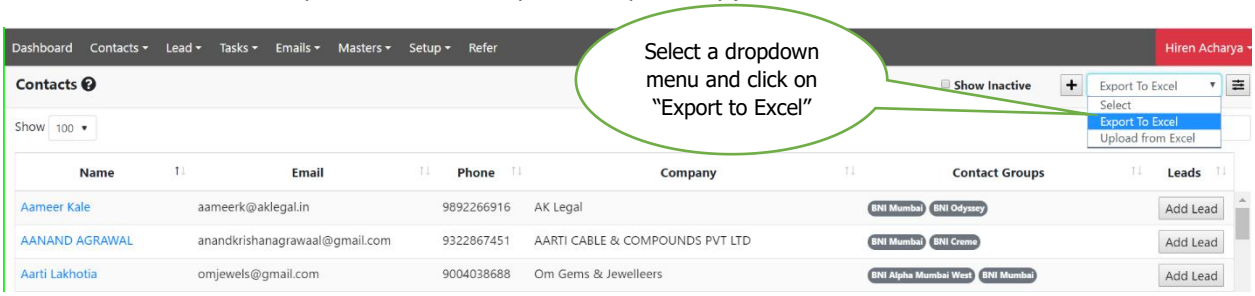



## 7. View Contacts.

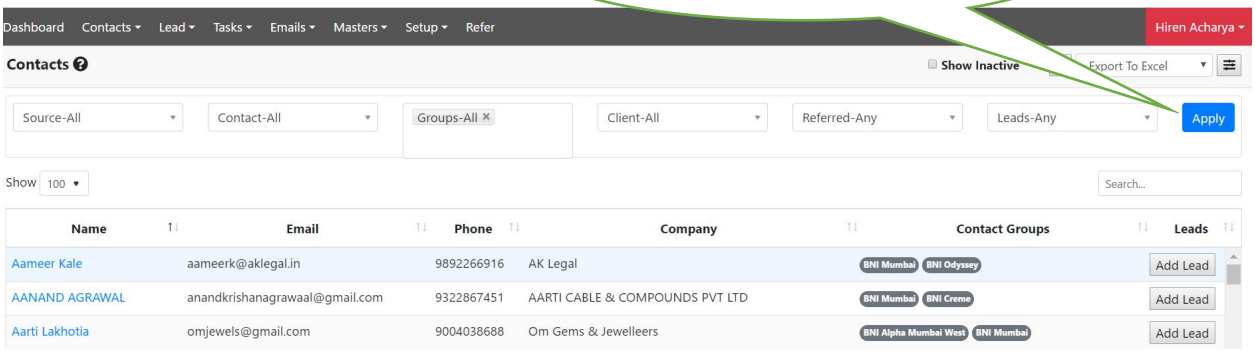




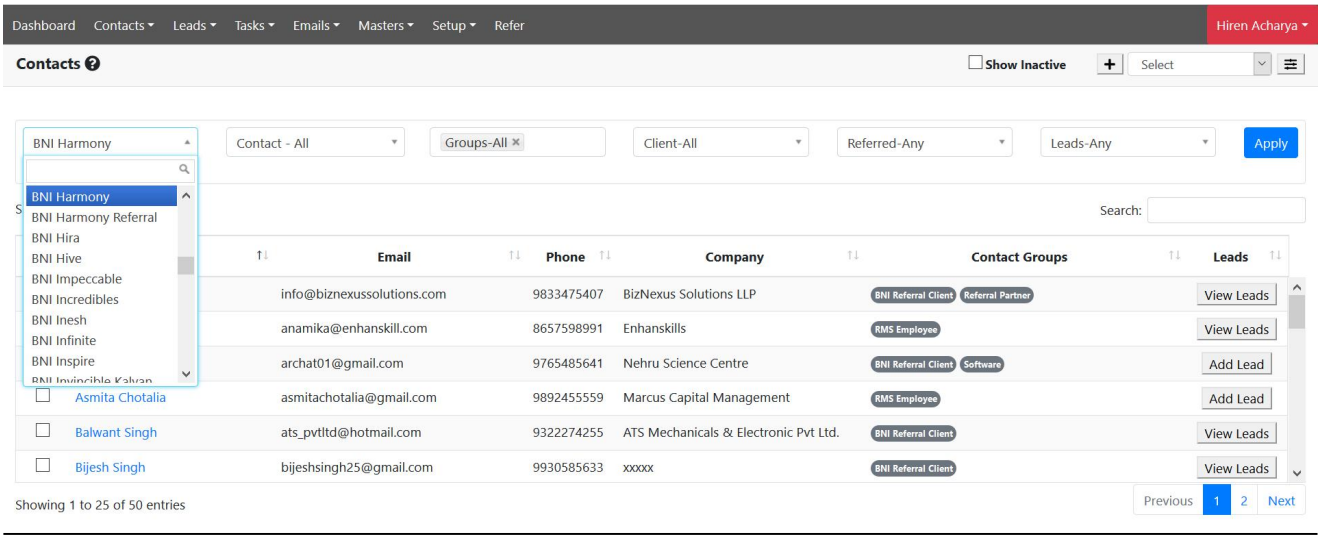

**8.** Export to Excel of Contacts. – Exporting to Excel you can export all your contacts on to the excel file which is automatically downloaded on your computer by just once click.



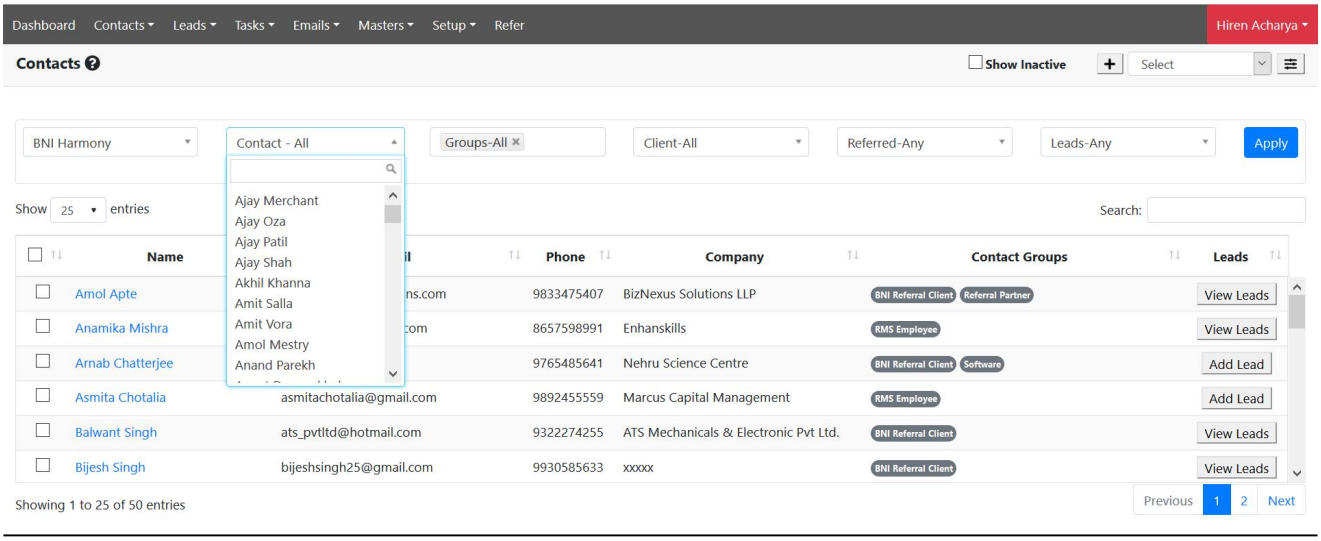

**9.** Viewing Contacts with Multiple Filters



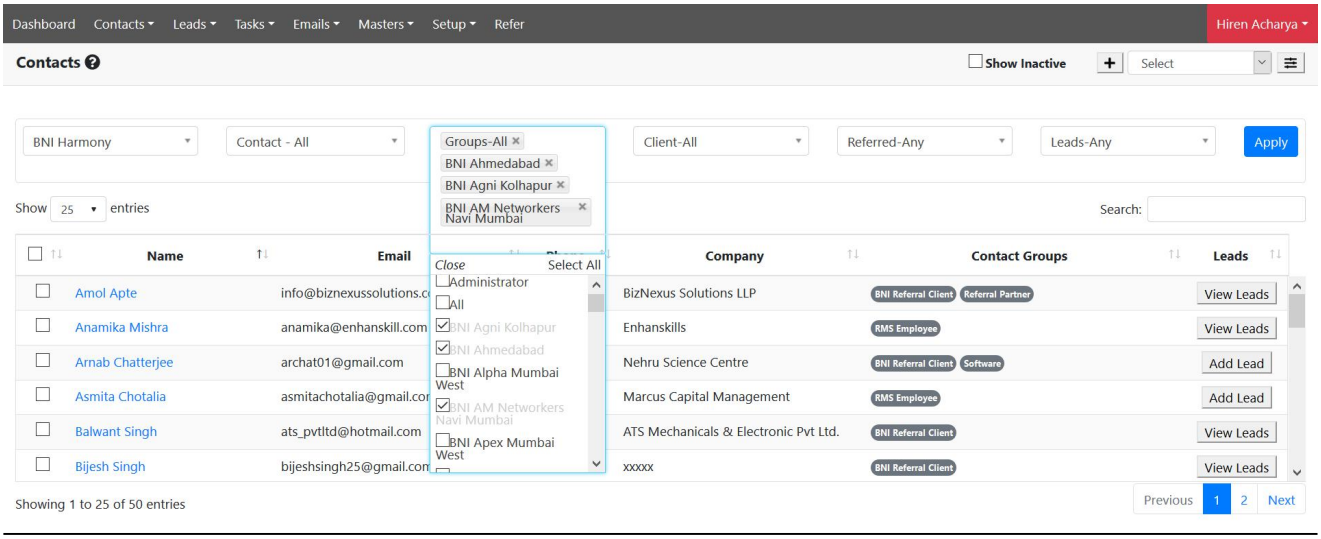
## 9.1. Listing contacts selecting the Source Group.



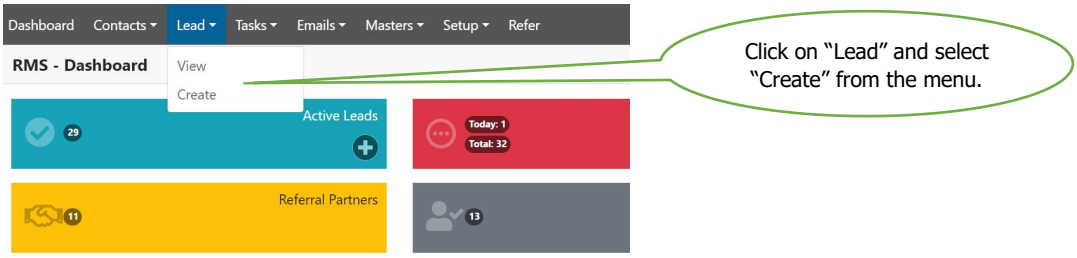

## 9.2. Listing Contacts selecting the Source Contact.



### 9.3. Listing Contacts from Single group or multiple Groups.

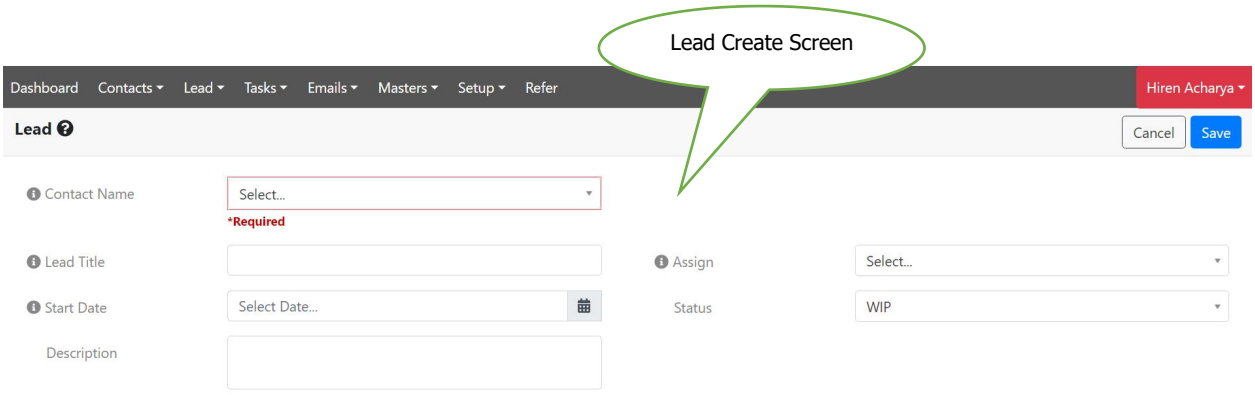



## 10. Create Lead.

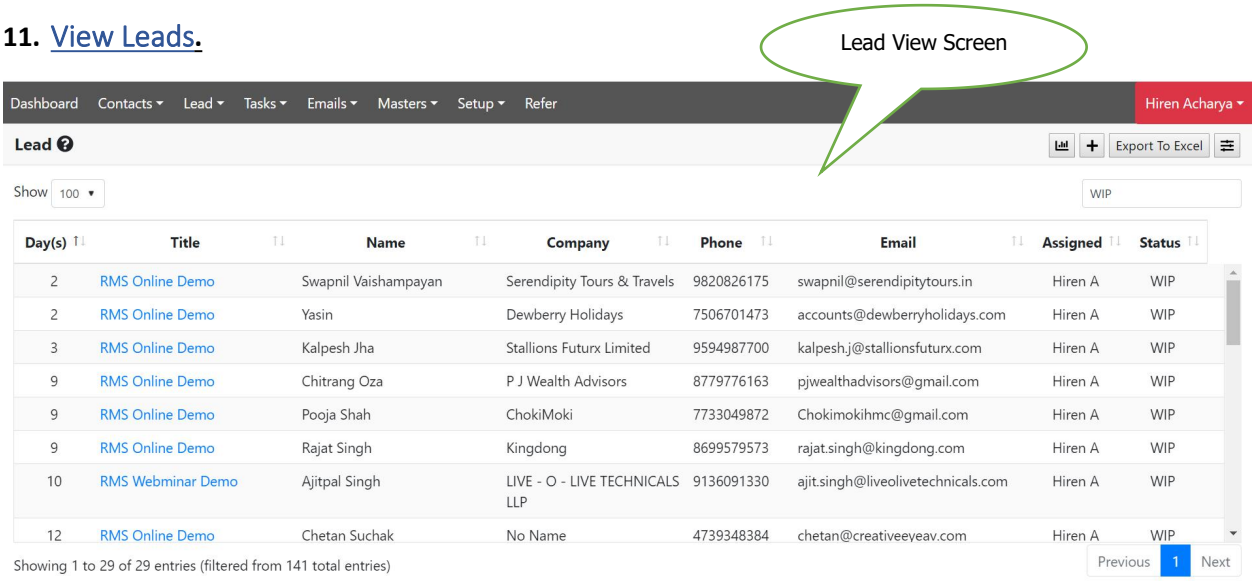



### 10.1. Lead Create points.

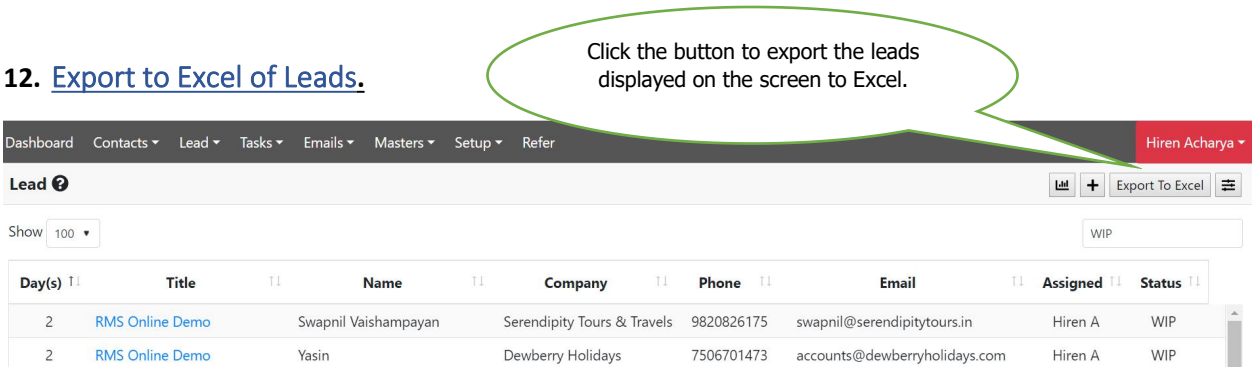
10.1.1. Enter Contact Name – (Mandatory Field)
10.1.2. Enter Lead Title.
10.1.3. Lead Start Date
10.1.4. Assign lead to – (User)
10.1.5. Status – (By default it will be WIP – Work in Progress)
10.1.6. Lead Description – (250 characters detailed input)



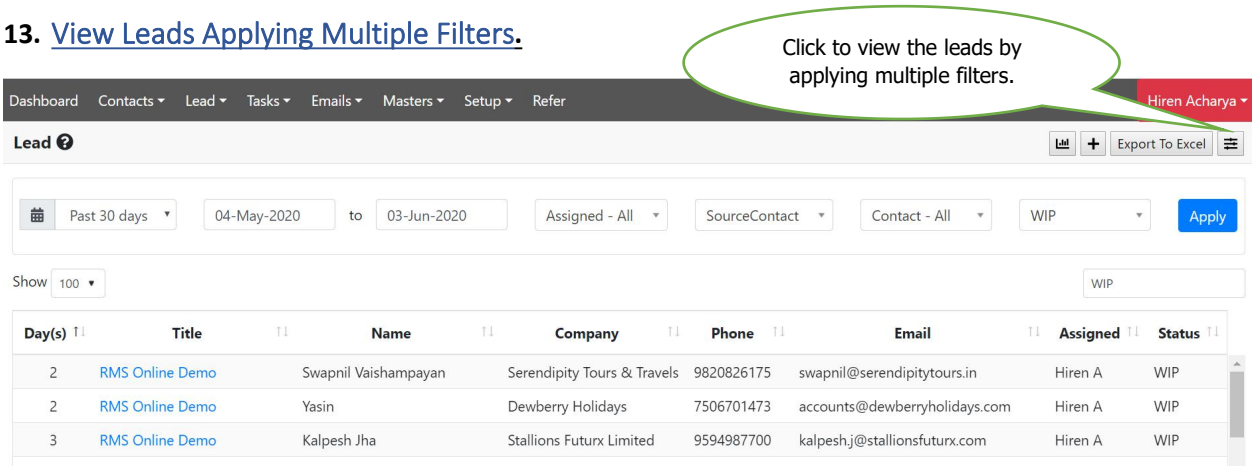

## 11. View Leads.



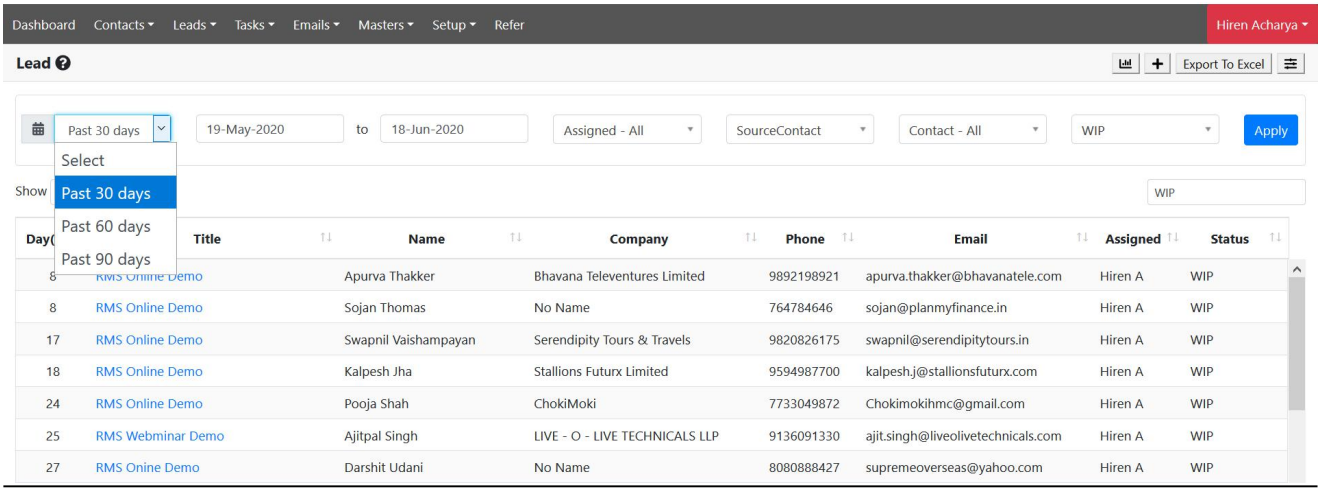

## 12. Export to Excel of Leads.



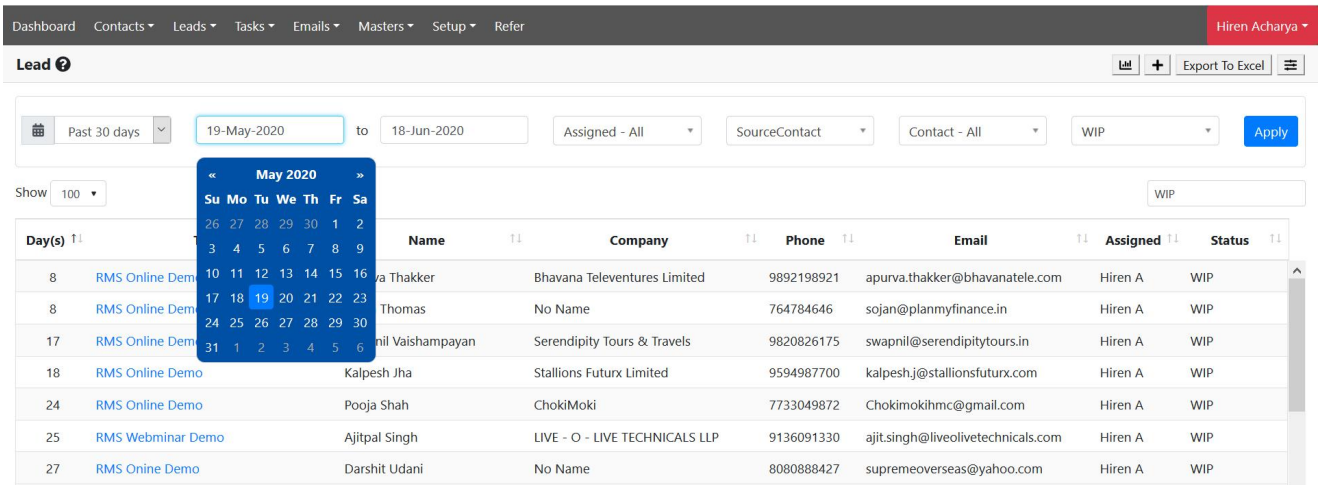
## 13. View Leads Applying Multiple Filters.



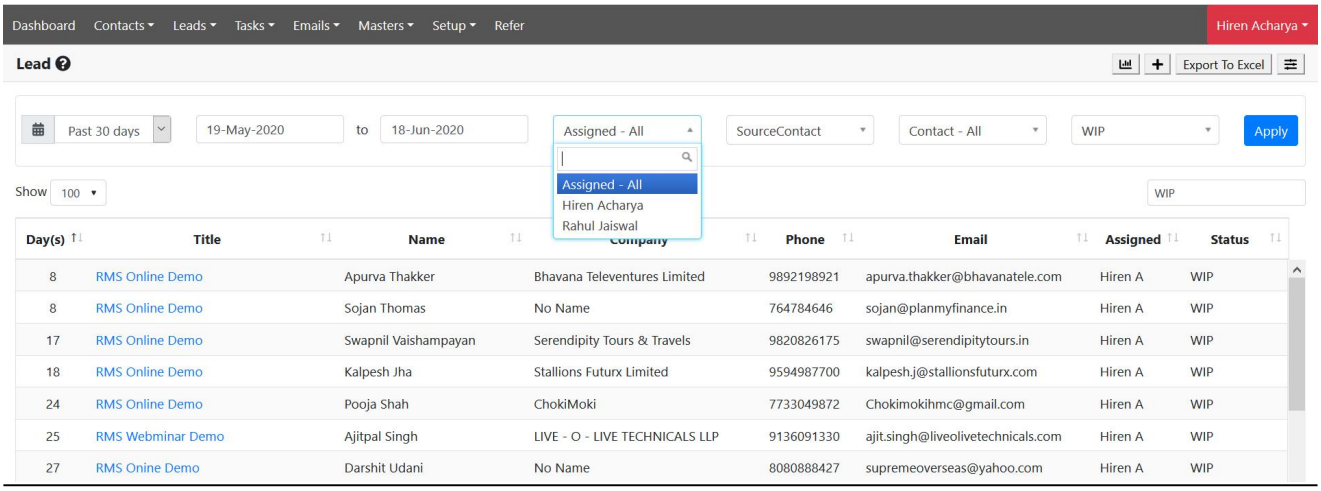

### 13.1. Listing leads with Old Days. – i.e. 30 days, 60 days and 90 days.



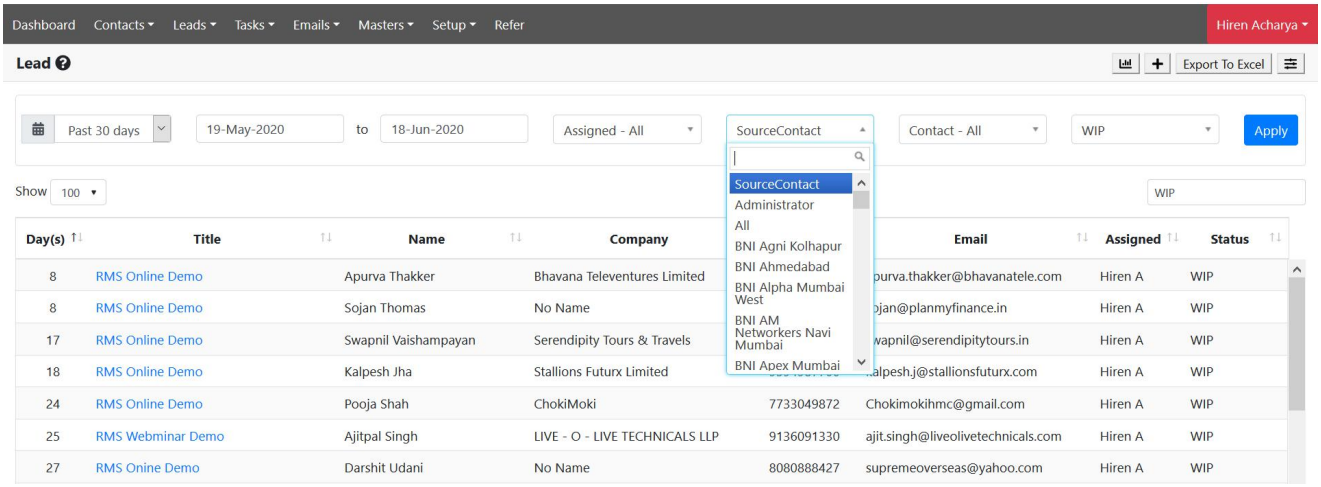
## 13.2. Listing leads with Date Range.



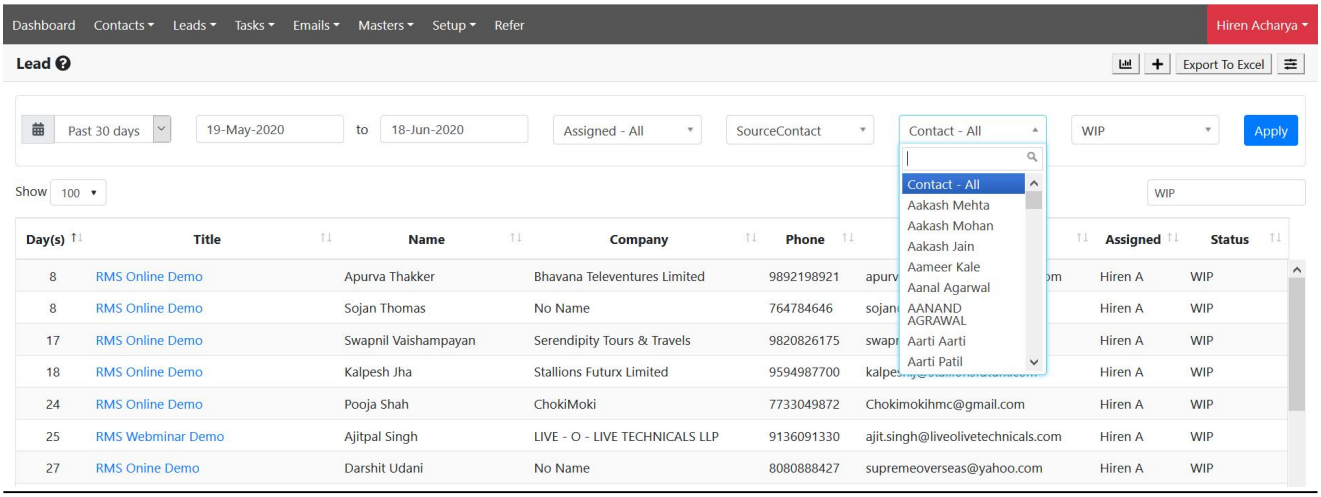

## 13.3. Listing leads assigned to Users.



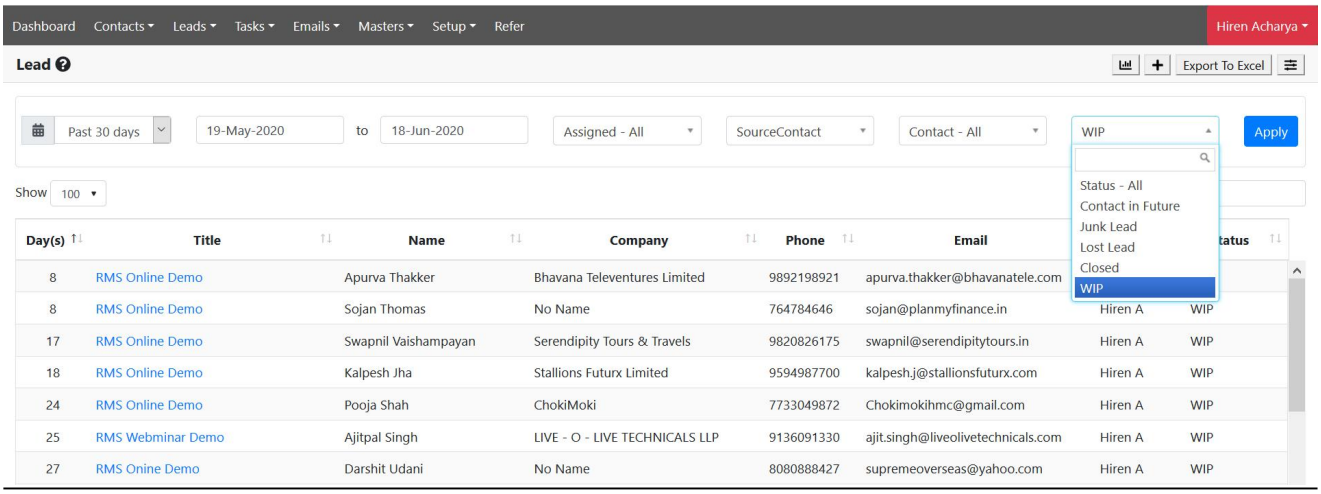
## 13.4. Listing leads from the Groups.



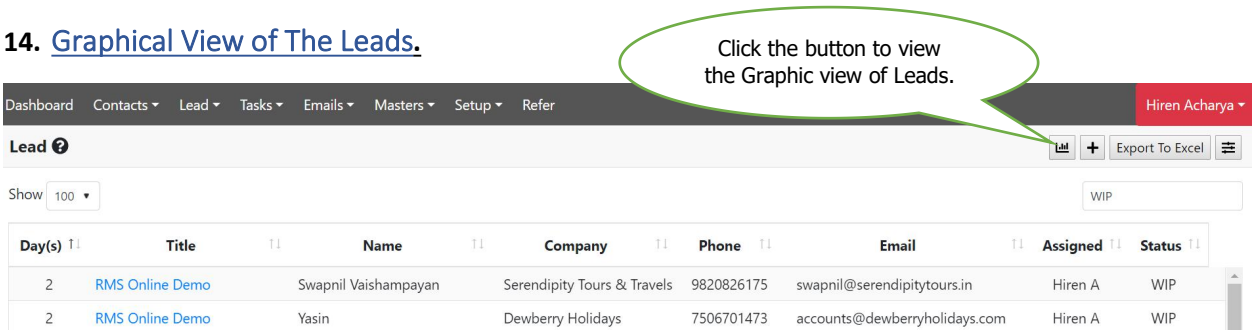

## 13.5. Listing leads from the Contacts.

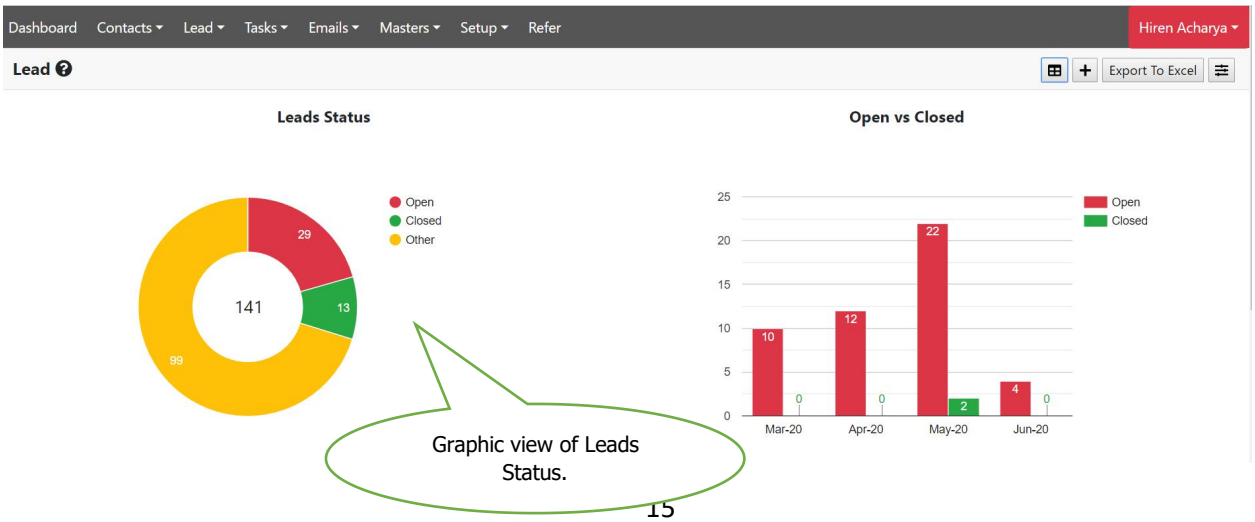


## 13.6. Listing leads by the Lead Status.

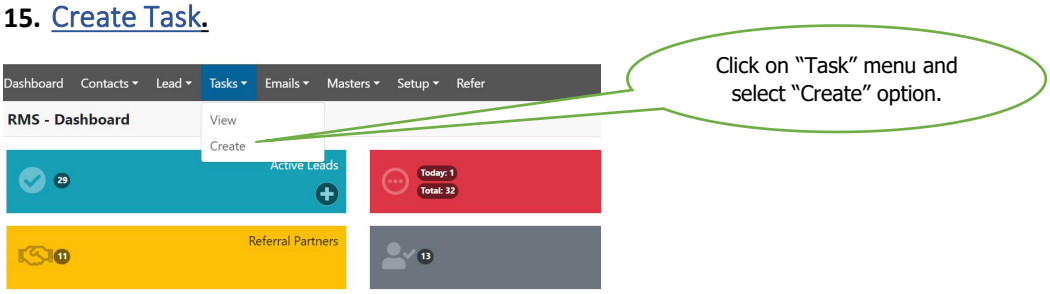



## 14. Graphical View of The Leads.



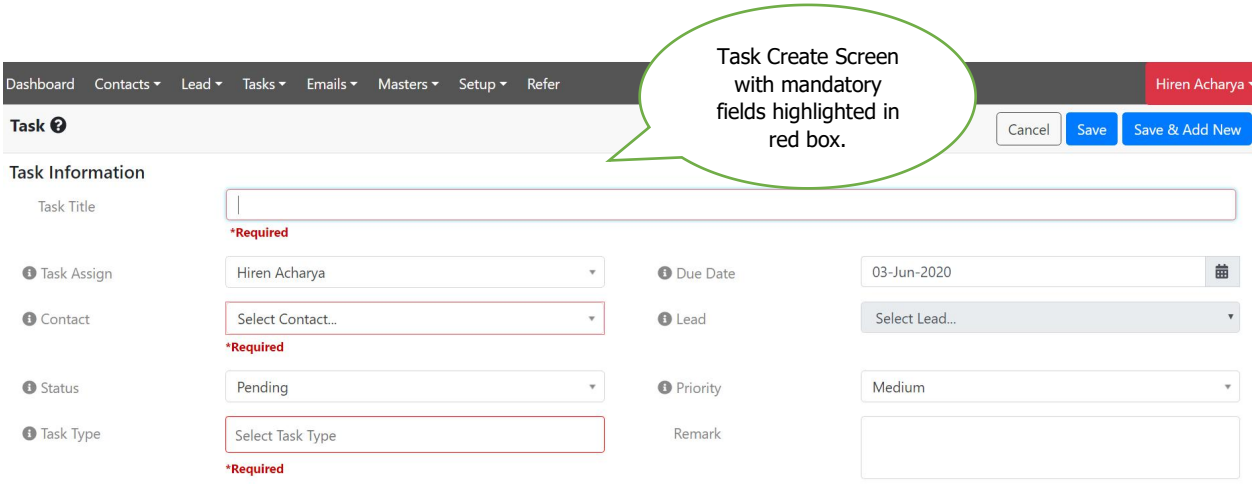



## 15. Create Task.

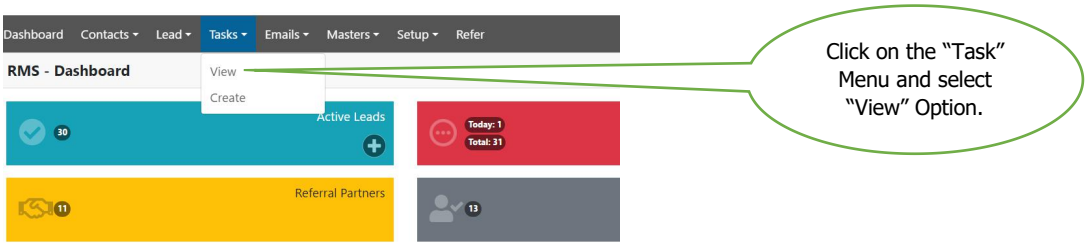


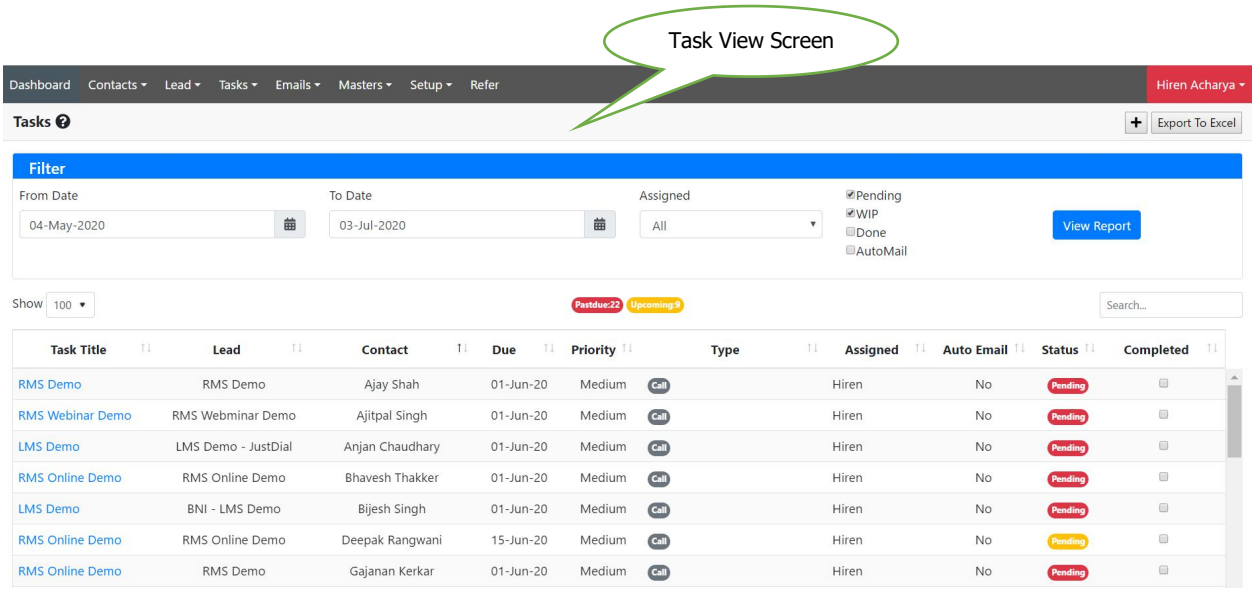

## 16. Task Create Points.

16.1. Enter Task Title - (Mandatory)
16.2. Task Assign – To which user you want to assign the task.
16.3. Task Contact – Select the Contact for whom we want to create the task. (Mandatory)
16.4. Task Status – Can select Pending, Done, WIP -Work in Progress
16.5. Task Type – Can select any one task from the predefined as well as User defined task (Mandatory).
16.6. Due Date – Due date of the Task to be performed.
16.7. Lead Name – Auto display If Contact is having one lead for multiple lead you can select.
16.8. Priority – Can select High, Medium and Low priority of the task.
16.9. Remark - Can input the text remarks up to 250 characters.

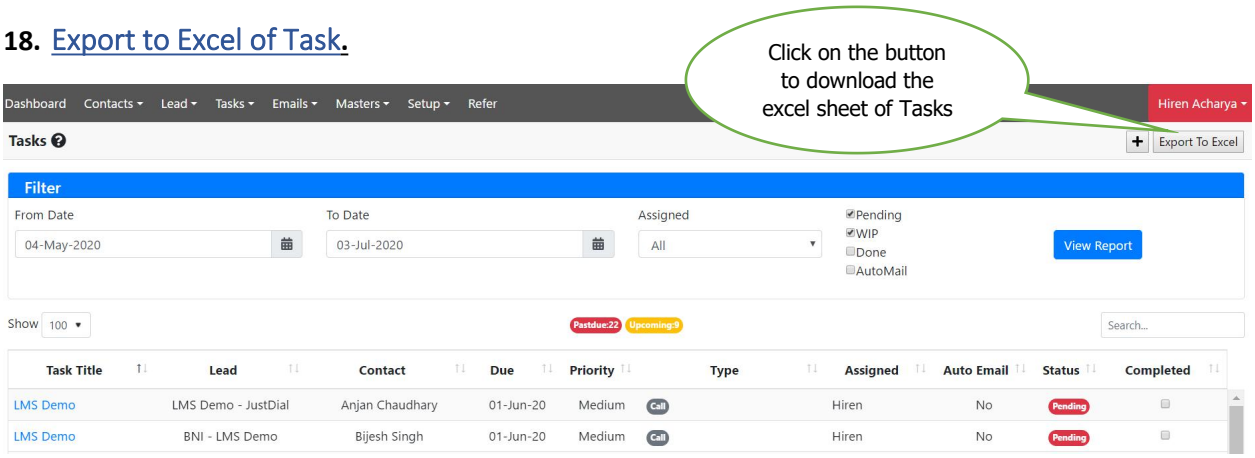



## 17. View Task.

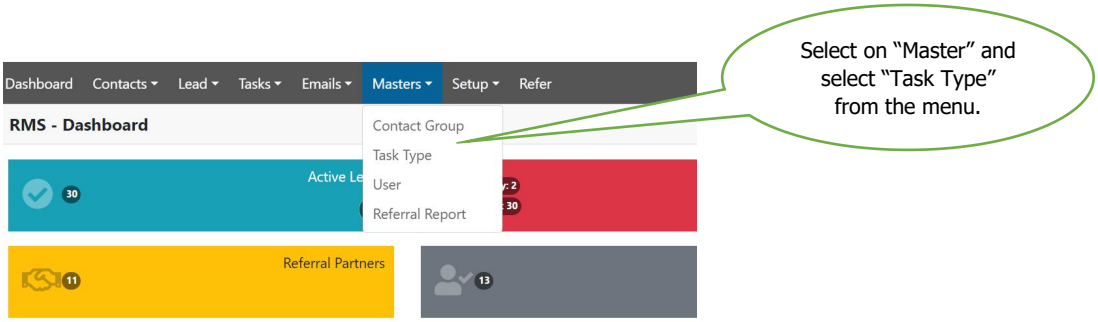


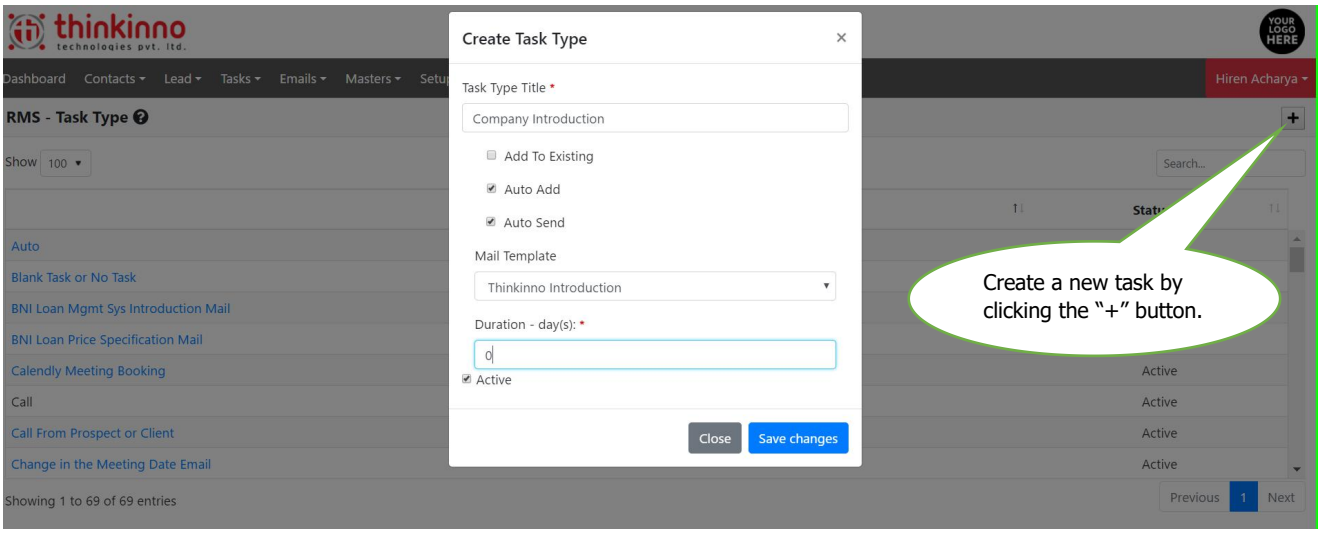



## 18. Export to Excel of Task.




## 19. Create Task Types. – User can create "N" number of tasks type as per the business requirement.

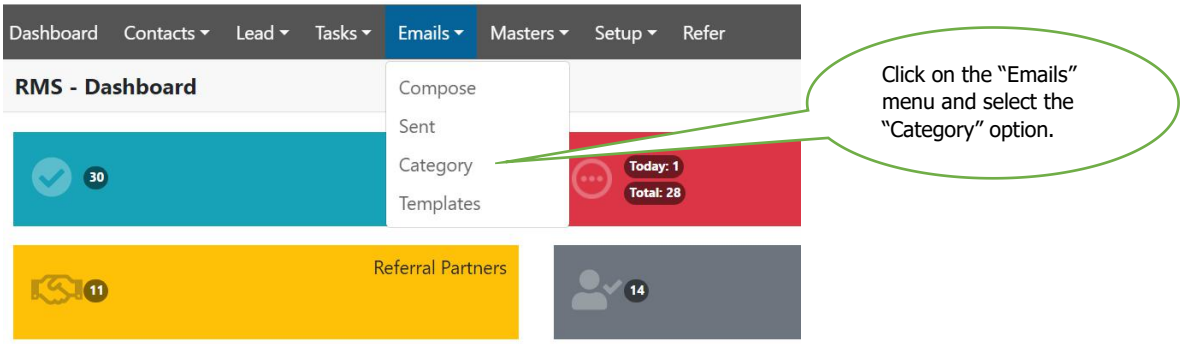


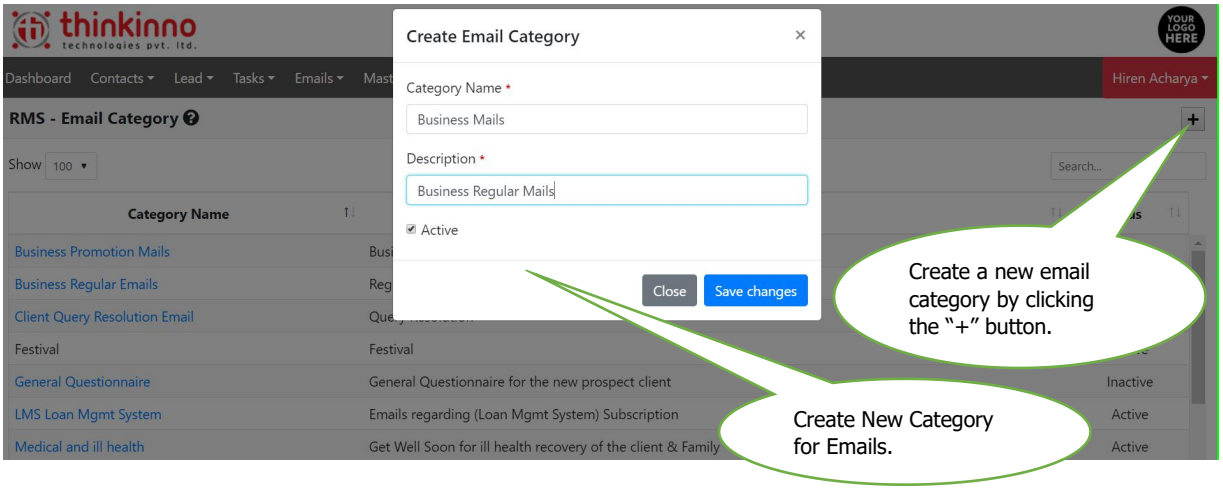



19.1. Auto Add Facility - This option is selected while creating a task type when you want to add a particular task automatically while creating any lead. This task will be auto listed once the any lead is created for the contact.

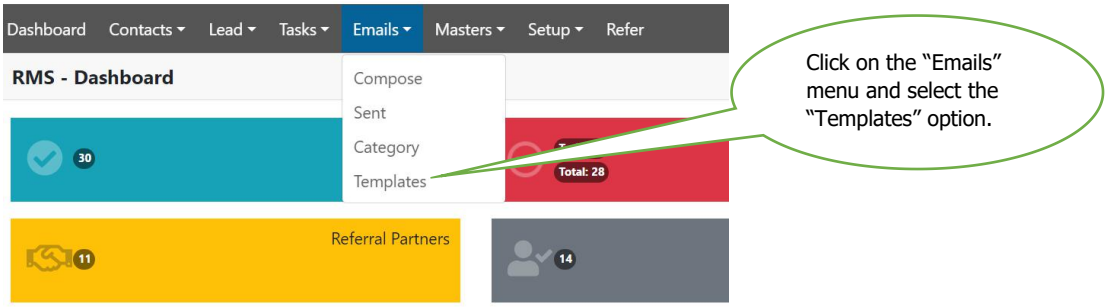
19.2. Auto Send Facility – This option is used while creating a task type in which you can send a selected email automatically on creation of any lead. You can also provide the days in the "Duration – Days" box that after how many days you would like to send this email automatically. If you input "0" zero means you would like to send it as soon as lead is created and if numeric "1" ,"2" that means you would like to send the email automatically after number of days entered in the box.

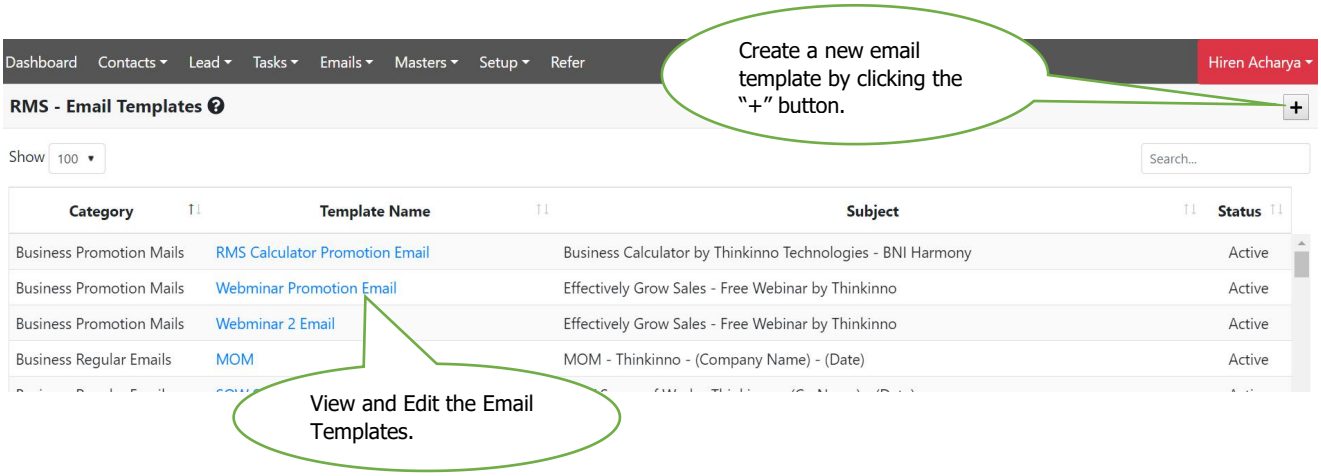
## 20. Create Email Category.





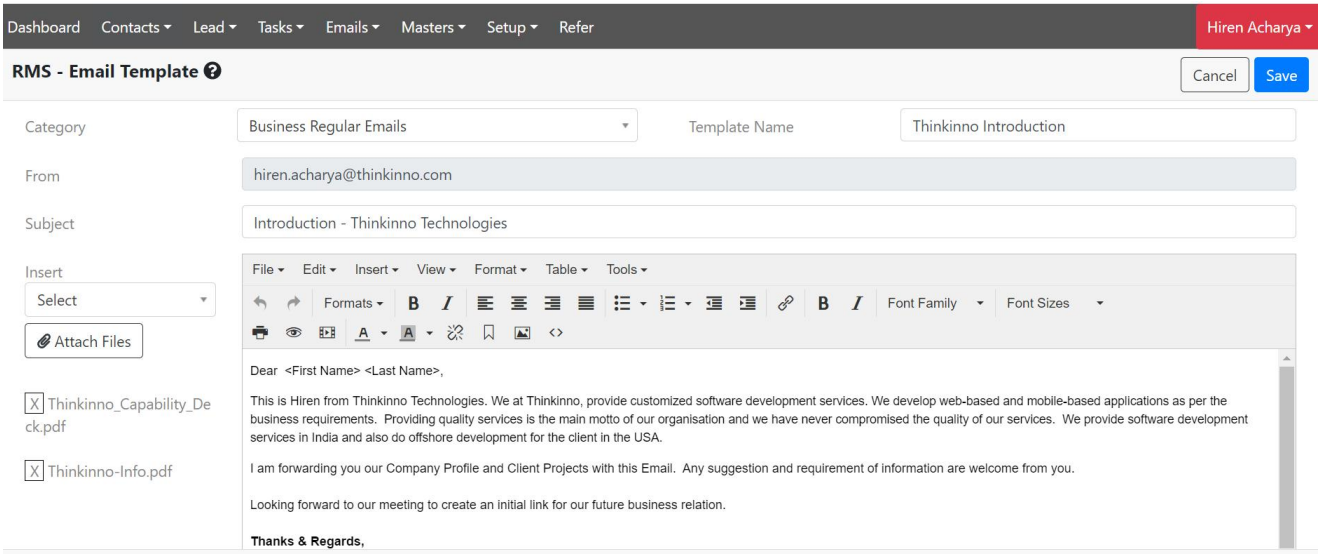

## 21. Create Email Template.



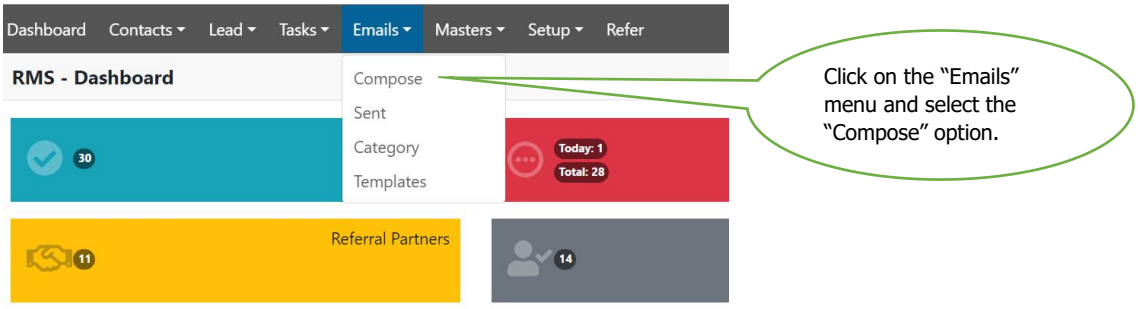



21.1. Steps to Create a new Email Template.

21.1.1. Select the “Category”.
21.1.2. Enter “Template Name”.
21.1.3. Enter “Subject”.
21.1.4. Insert First Name and Last Name from the Dropdown “Insert”.
21.1.5. Create or Copy paste the Body text of the email.
21.1.6. There is a facility to “Attach Files” to the email.
21.1.7. “Save” the Email Template.




## 22. Compose an Email.



22.1. Steps to Compose an Email Selecting a ready Template.

22.2. Select the “Template” .

22.3. Select the “To” – The Contact name, Email Id, Group Name.

22.4. Select “Cc” and “Bcc” – If any.

22.5. Click the button “Send”.

**Note:** You can edit or add the body text of the email. You can remove or add the attached files.

22.6. Steps to Compose an Customized Email.

22.6.1. Select “To” – The Contact name, Email Id, Group Name.

22.6.2. Select “Cc” and “Bcc” – If any.

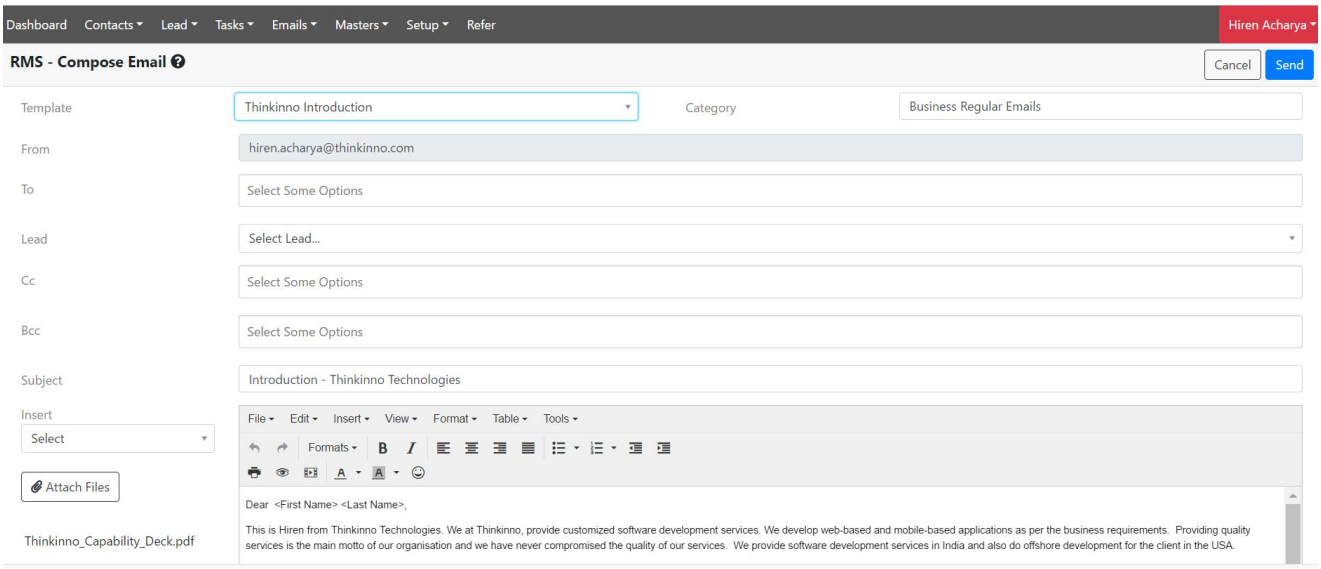
22.6.3. Enter “Subject” of the Email.

22.6.4. Insert First Name and Last Name from the “Select” dropdown.

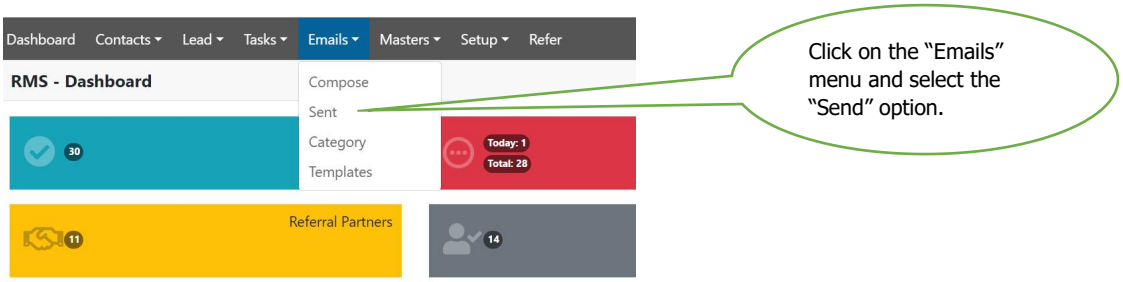
22.6.5. Enter or Copy paste the Body text of the Email.

22.6.6. Attach files using “Attach Files” options.

22.6.7. Click the button “Send”.



## 23. How to View the Sent Emails.



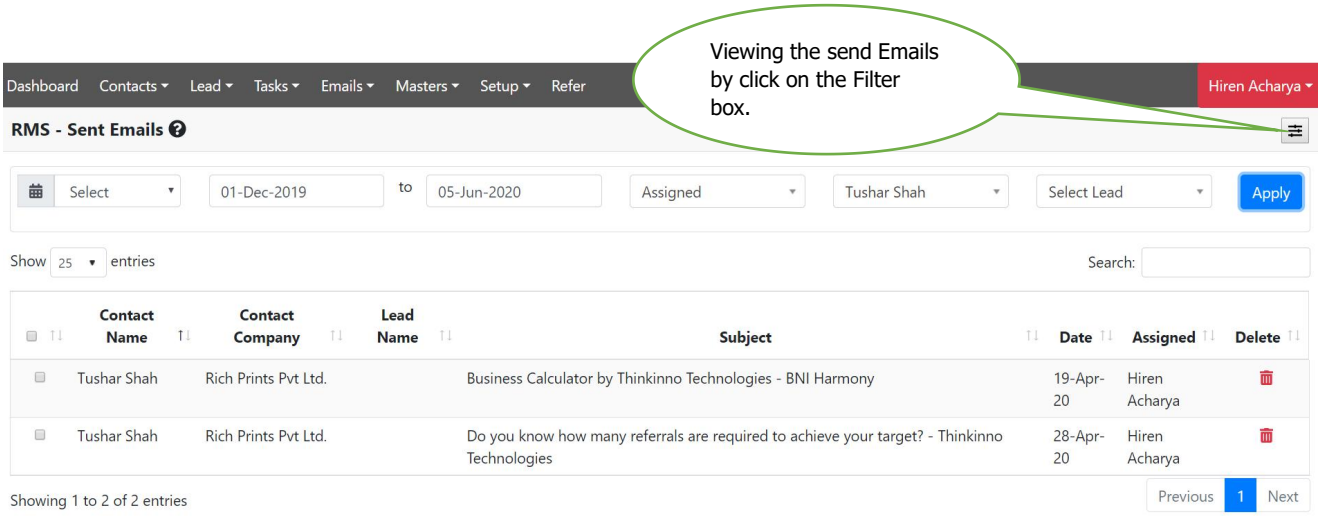

### 23.1. Points to view the Sent mails applying Filters.

23.1.1. Mails can be viewed for last 30, 60 and 90 Days.

23.1.2. Mails can be viewed by selecting "From" and "To" date range.

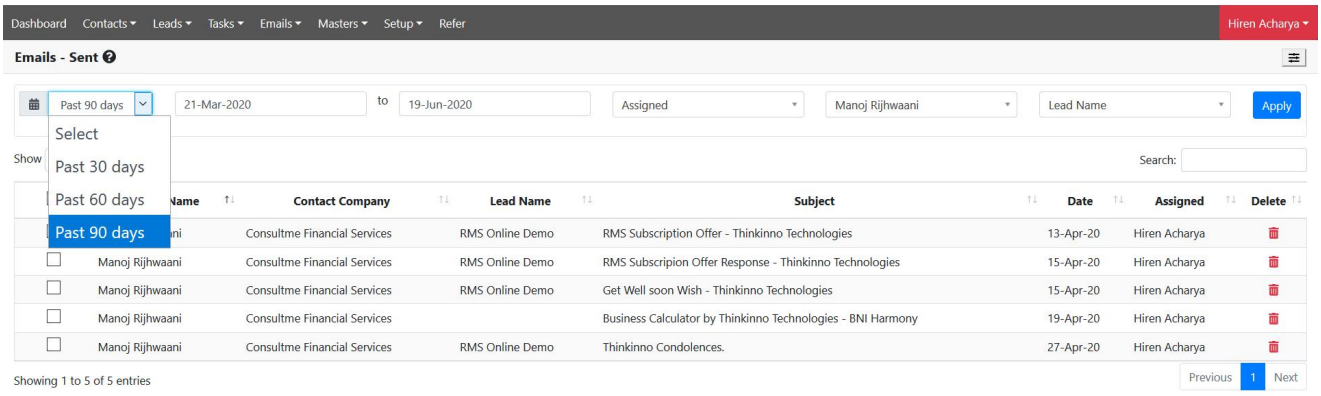
23.1.3. Mails issued by various user can be viewed by selecting the "Assigned" dropdown.

23.1.4. Mails can be viewed for a particular contact by selecting the "Contact Name" dropdown.

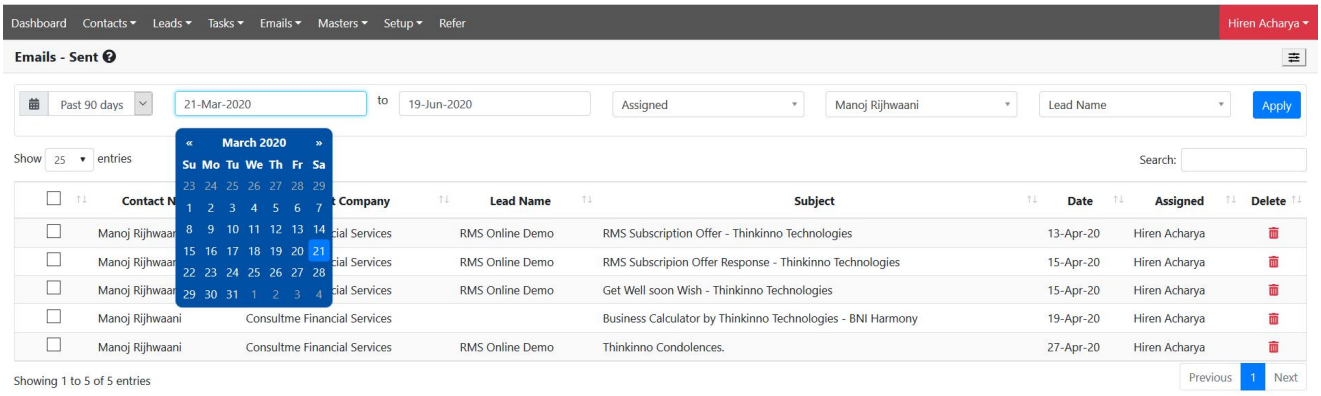


## 24. View Send Mails Applying various Filters.

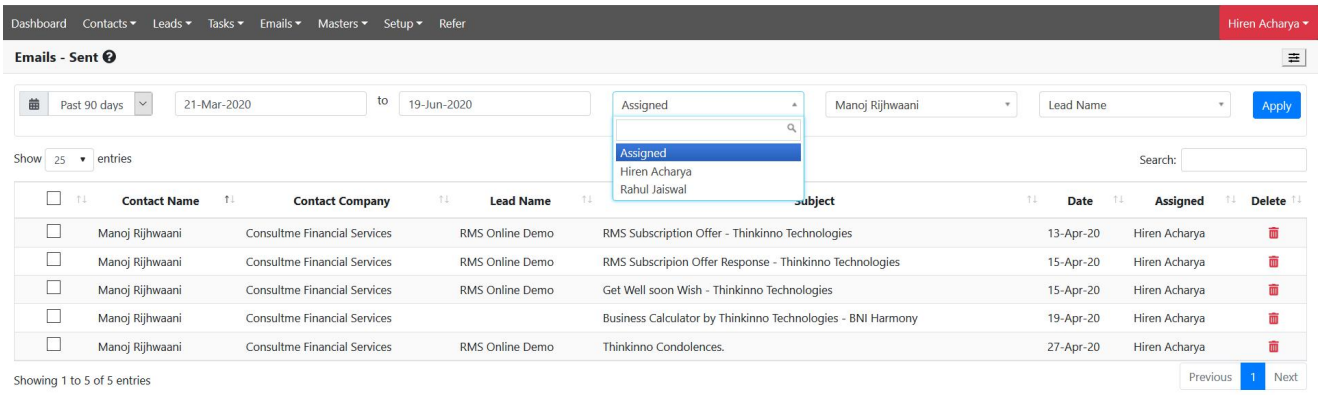
### 24.1. View Mails for last 30, 60 or 90 days emails.



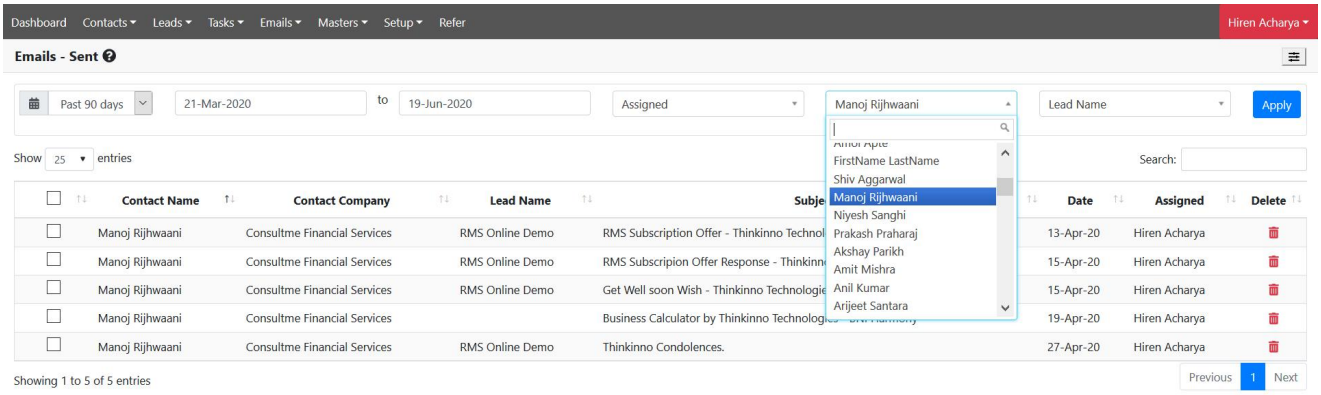

### 24.2. View Mails applying Date range.



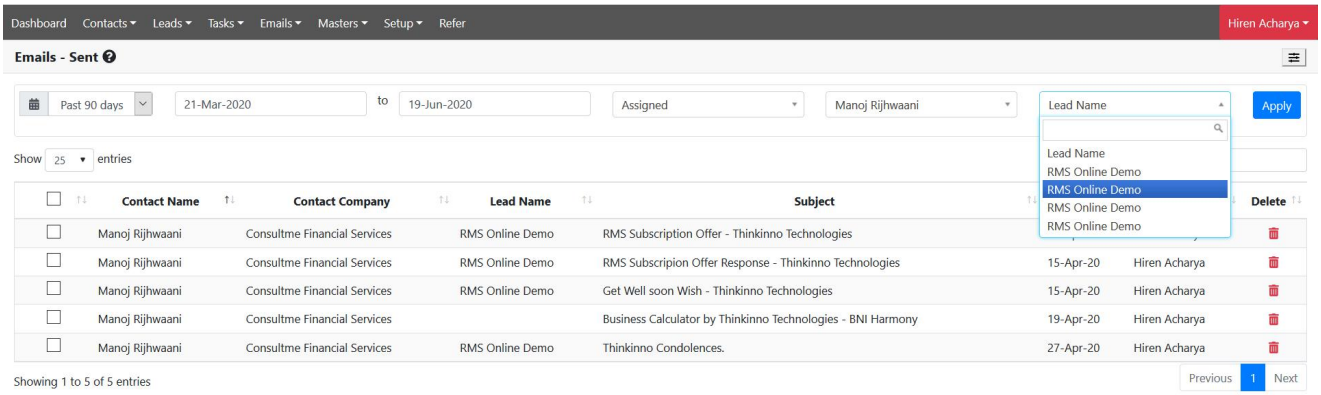

### 24.3. View Mails Send by the Users.



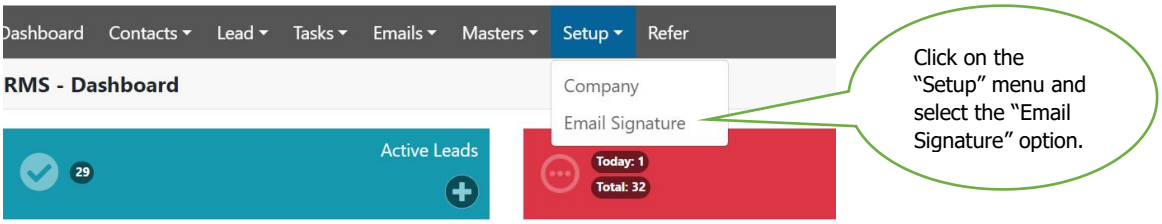
### 24.4. View Mails send to one Contact.




### 24.5. View Mails send for the Lead Type.




## 25. Setting up Email Signature.




## 26. Setting up Email Signature screen has three options, setup is as follows.

### 26.1. Steps to Add an Email ID .

26.1.1. Select the Domain of your email ID from the dropdown, i.e. Google, Yahoo, Hotmail.

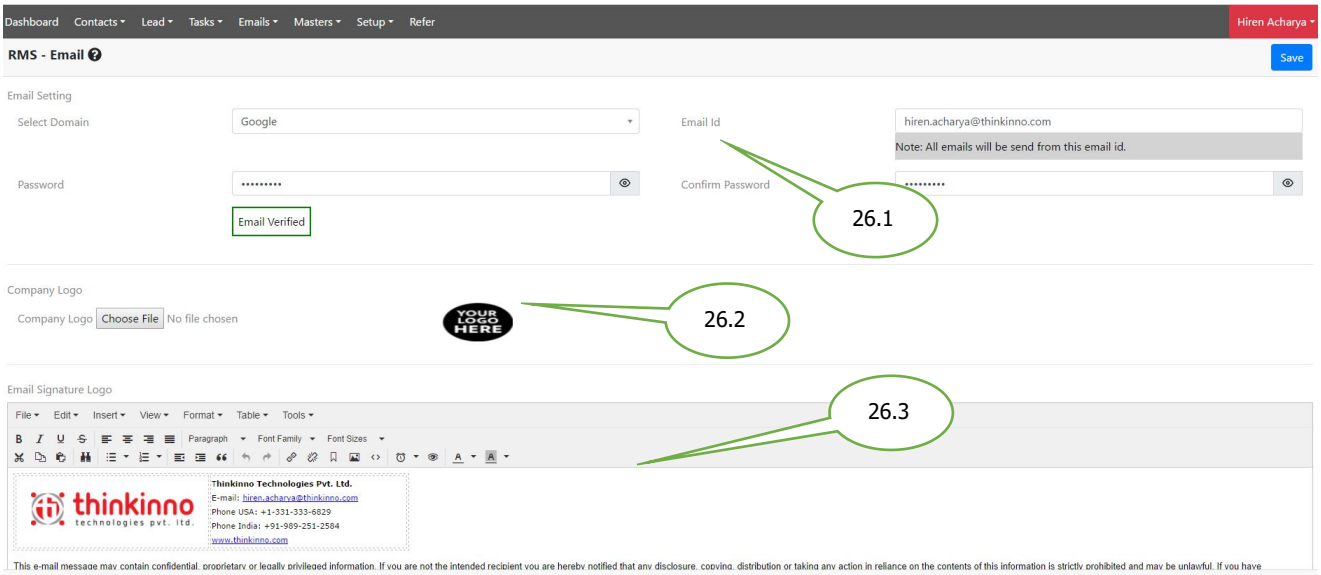
26.1.2. Add Email ID for the use to send the Emails.
26.1.3. Enter Password
26.1.4. Enter Confirm Password.
26.1.5. Note: Both the passwords should match each other.
26.1.6. Once you "Save" the Email ID settings you will receive the verification email in your email id mailbox.
26.1.7. Click on the link from the email send to you email id to login the APPLICATION application.
26.1.8. You can view the message "Email Verified" by again selecting the Setup menu and "Email Signature" option.

## 26.2. To Update the Company Logo.

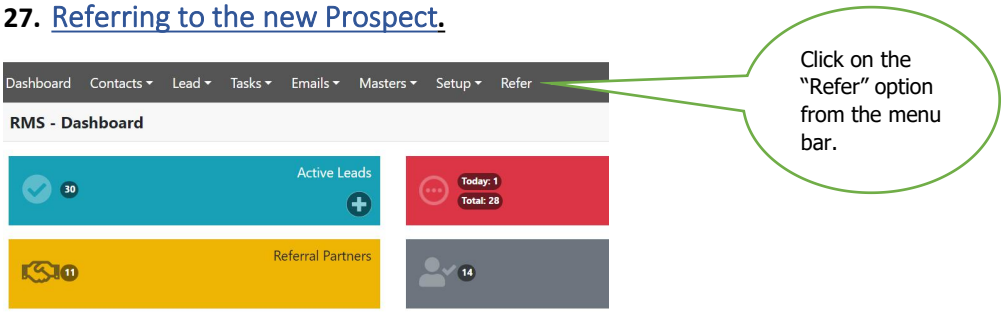
26.2.1. Click on the "Choose File" button to select the Graphic Logo File.
26.2.2. You can view your company logo on the top right corner of the screen.

## 26.3. To Add an Email Signature.

26.3.1. Facility to add a Company Logo in the email signature section.
26.3.2. Facility to add the text in the email signature.



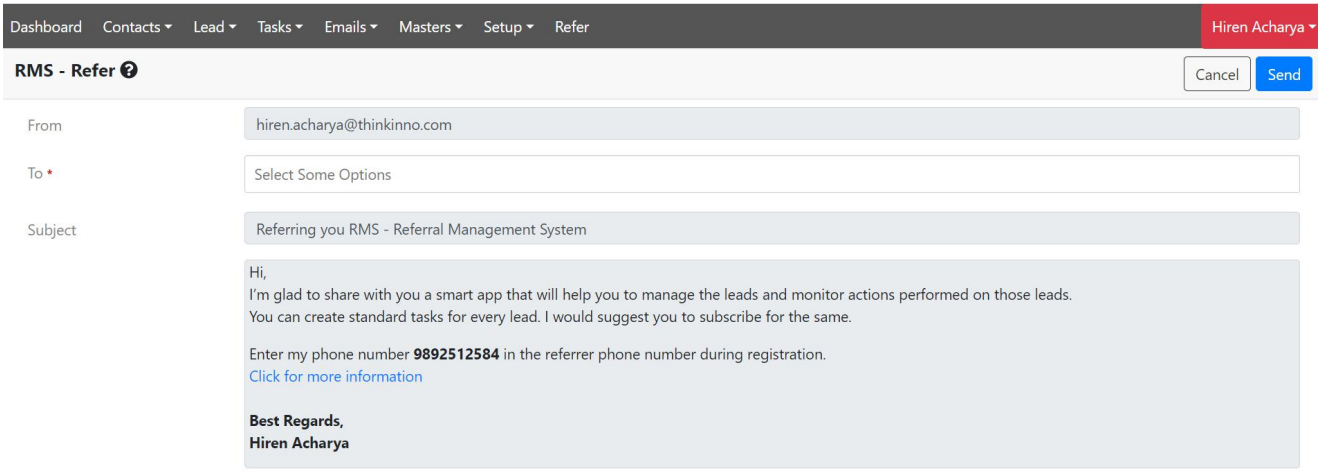

## 27. Referring to the new Prospect.



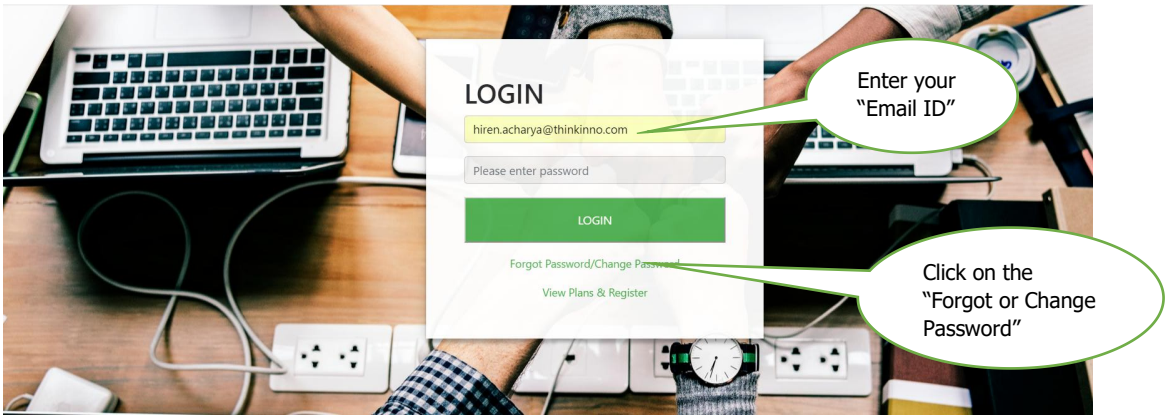
27.1. Steps to refer a new Prospect.

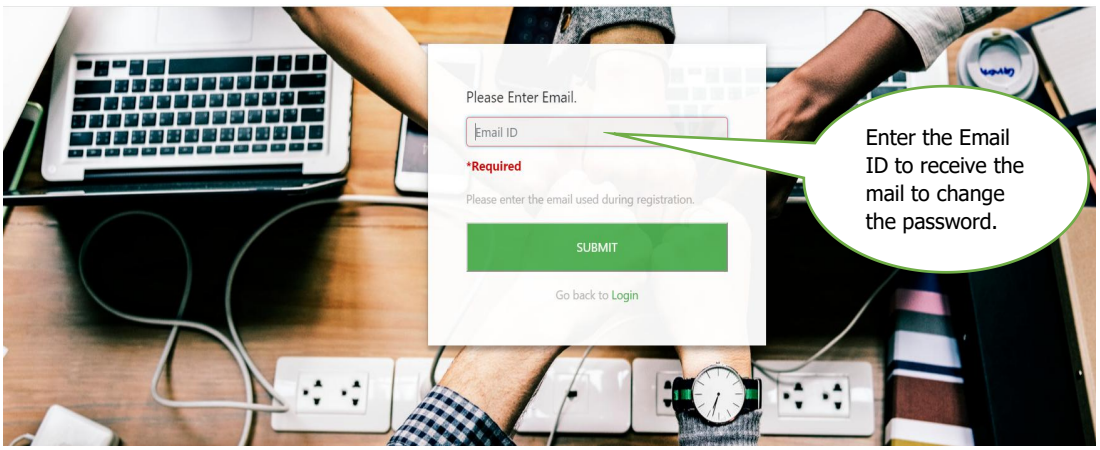
27.1.1. Select the Contact name or email to whom you want to refer in the “To” selection.

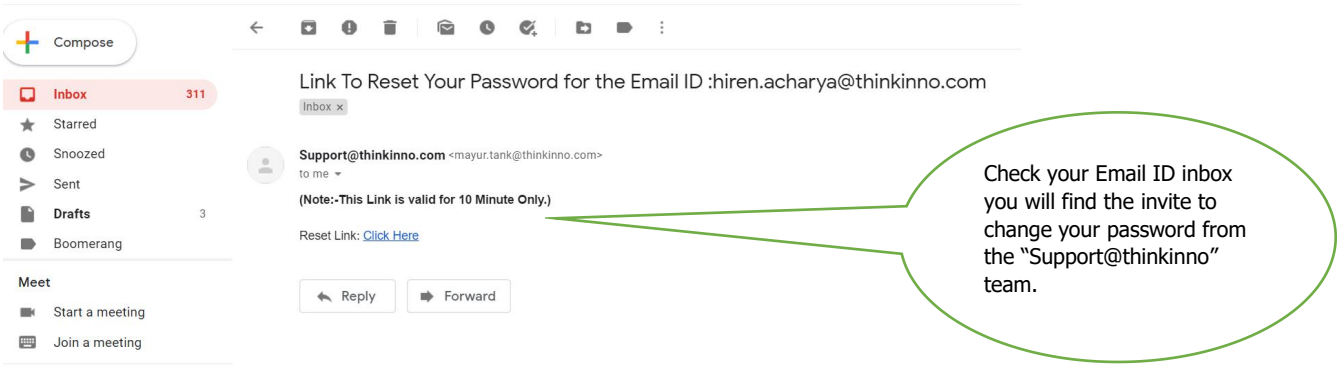
27.1.2. Click on the “Send” button.

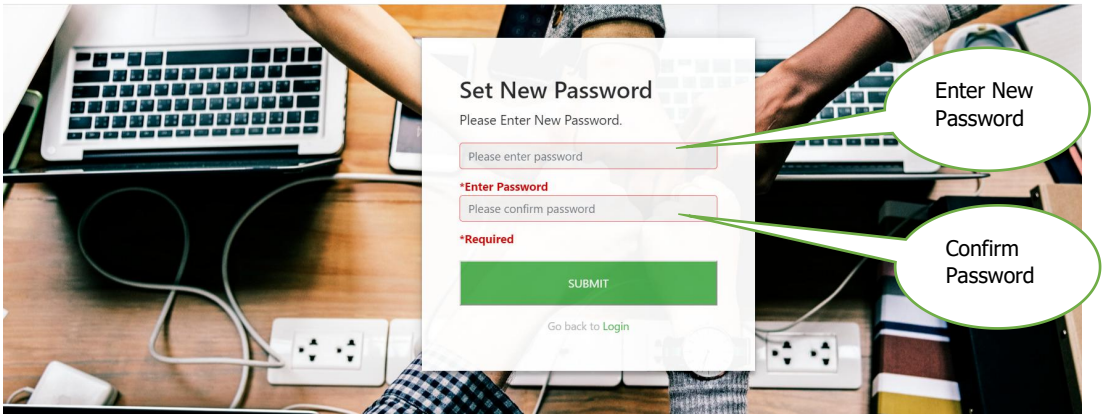



**28.** Change or Forgot Password step by step.

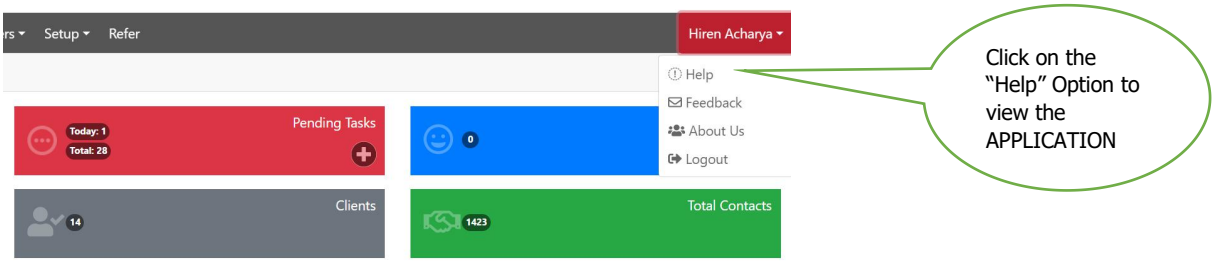


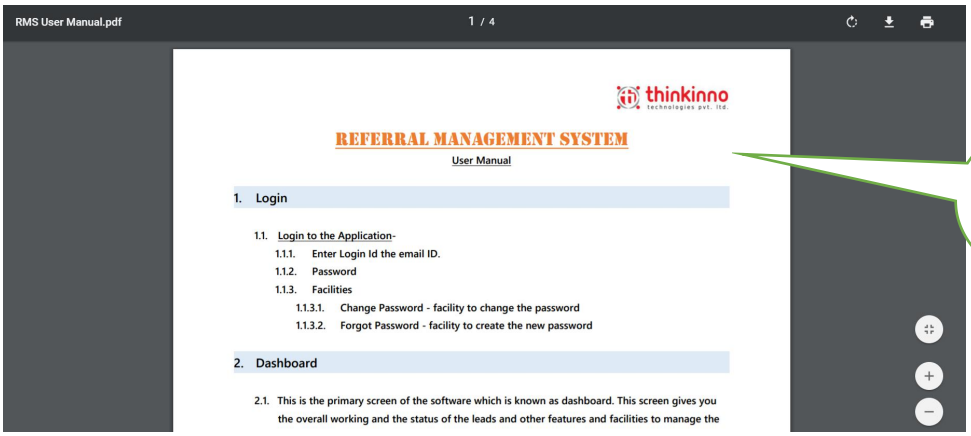





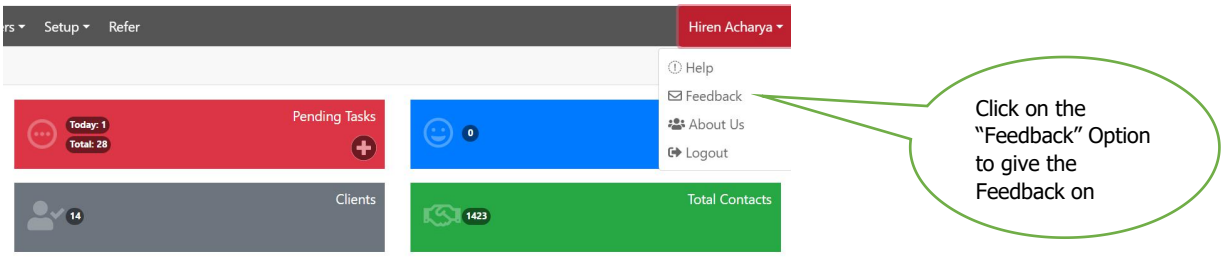



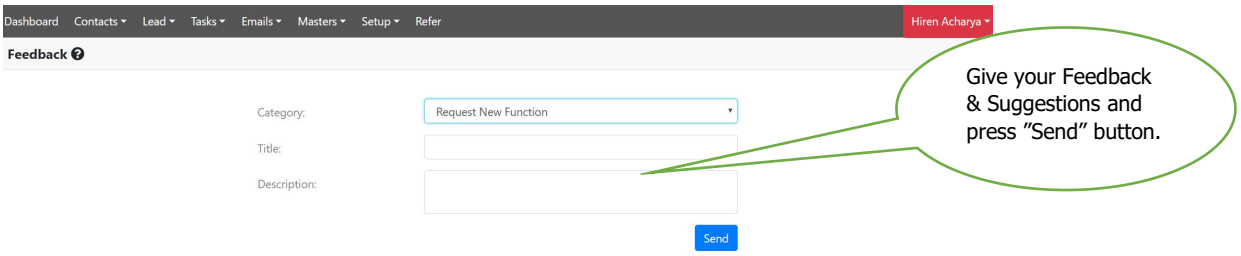

## 29. How to find the Help?






## 30. How to give a Feedback and Suggestions?




## 31. Where to write for the Query?

**Email ID –** support@thinkinno.com