

## Lead Victor Features

### Contact Management

- Source Tracking
- Contact Grouping
- Track Referral Partners
- Excel Upload
- Excel Download
- Column Selector
  
- Automatic Birthday Wishes
- Automatic Anniversary Wishes
- Quick Sort
- Smart Filters
- Quick Search

### Lead Management

- Add Lead & Contact Quickly
- Source Tracking
- Lead Assignment
- Lead Status
- Configure Average Lead Conversion
- Lead Age Tracking
- Interaction Tracking
- Categorize Your Leads
- Graphical View - Open / Closed Leads
- Graphical View - Monthly Views
  
- Graphical View - Lead Sources
- Assignment Report
- Status Report
- Sources Report
- Automatically send profile / catalog
- Automatically send emails
- Sort Leads as per Lead Age, Assigned, Status
- Filter Leads as per Lead Age, Assigned, Status
- Excel Upload / Excel Download

- Quick Search
- Column Selector

## **Task Management**

- Configure Standard Tasks
- Set task to be added automatically
- Set task to perform automatically
- Task View
- Daily Reminders
- Weekly Reminders
- Configure Task Types
- Task Tagging
  
- Task Notes
- Speech to Text - Notes (NEW)
- Add to Calendar
- Track connections required
- Sort Task as per Priority, Due Date, Assigned, status
- Filter Task as per Priority, Due Date, Assigned, status
- Excel Download
- Quick Search
- Recurring Task

## **User Management**

- Manage Users
- Access Rights
- Assign Leads
- Assign Tasks
- Review Performance
- Manage Contact Group
- Manage Task Type
- Manage Lead Status
- Manage Categories
- Manage Sub-categories
- Manage Template
- Manage Quotation

- *Contacts Export to Excel*
- *Leads Export to Excel*
- *Task Export to Excel*
- *Contacts Delete*
- *Contacts Disable*
- *Multi-level User Hierarchy*
- *Multi-level Reporting*

## **SMS**

- *Configure SMS*
- *SMS Templates*
- *Auto send SMS*
- *SMS Report*

## **Whats app**

- *Configure Whats app*
- *Whats app Templates*
- *Auto send messages*
- *SMS Report*

## **Email**

- *Personalized Email*
- *Use your existing Email*
- *Configure Your Email*
- *Email Templates*
- *Auto Email*
- *Email Signature*
- *Email Report*
- *Visible in your Sent mails*

## **Training**

- *In Person*
- *Online*
- *Videos*
- *Self Starter Kit*

- *Documentation*

## **Integration**

- *Web-hook Integration*
- *Email Integration*
- *Calendar Integration*
- *SMS Integration*
- *Whats app Integration*
- *Website Ingratiation.*
- *India Mart Integration*
- *Facebook Integration (Upcoming)Just Dial Integration (Upcoming)*
  
- *Linked In Integration (Upcoming)*
- *Google Integration (Upcoming)*

## **Security**

- *256 Bit SSL - Secure Site*
- *Secure Connection*
- *Authentication*
- *Authorization*
- *Secure Data*
- *Encrypted Data*
- *Geo-located Data Backup*
- *Access Rights*

## **Automation**

- *Configure Rules*
- *Manage Events & Actions*
- *When This happens Then do That*
- *Automate Notifications*
- *Automate Reminders*
- *Automate Reporting*
- *Daily Auto Report of Pending Tasks*
- *Weekly Auto Report of Summary*

## **Quotations (Add-on)**

- *Manage Quotations*
- *Assign Task as Create Quotation*
- *Quickly access Quotations for every lead*
- *Generate Quotation as PDF*
- *Attach Quotation PDF in the Email*
- *View multiple quotations for a lead*
- *Configure Product/Service Categories*
  
- *Configure Product/Service Sub-categories*
- *Configure Prices*
- *Set Discounts*
- *Auto-computed GST/VAT*
- *Configurable Terms & Conditions*
- *Configurable Header & Footer*
- *Auto-add bank details, Payment links, and QR Code in the Quotation*
- *Create your own unique Quotation format*