



Empowering Your Digital Future

Your Trusted Gateway to 72+ Countries
with Our Seamless Services





ABOUT US

We will provide easy service to you

LeafTech.in is your trusted destination for cutting-edge website and software development solutions. With a team of skilled professionals, we transform your ideas into digital realities, crafting websites and software that empower your business for success in today's digital landscape

13Th

Year's of
Experiance

27⁺

Experianced
Team

5K⁺

Website's
Development

5223 CUSTOMER USING THIS APPLICATION

Modules we cover

1st

Purchase Module

We kick off the process by diving deep into your business's operations. We take the time to identify the exact problems you're facing.

2nd

Quotation Module

Our dedicated team works diligently to design a solution that not only tackles your problems but also aligns with your long-term goals.

3rd

Billing and Accounting

This stage ensures that you have a clear picture of what to expect and allows us to make necessary adjustments based on your feedback.

4th

Stock Management

We believe that your involvement in the development process is vital. Your approval and feedback matter at every step.



DEMO SOFTWARE

Testing Credentials

https://leaftech.co.in/customer_relationship_management/superadmin.php

Username : Superadmin
Password : 123456

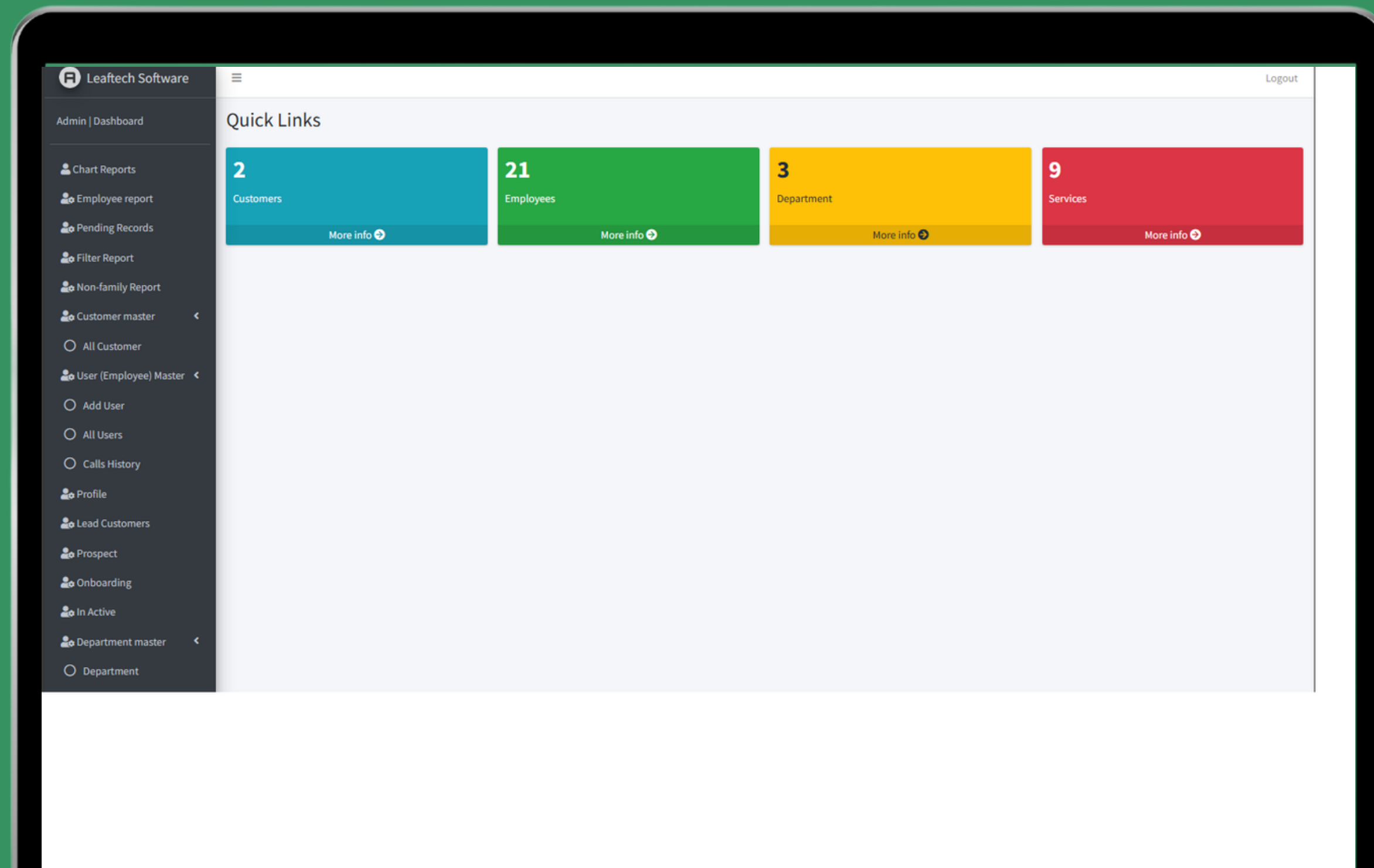
The features of the actual software may be different in understanding documentation is just a guideline of our proposed projects though we recommend you to test all features before purchase

Dashboard Overview

Super Admin Login

The Dashboard provides a snapshot of

- Customers
- Employees
- Department
- Services



Masters

- Adding a New User :
 - Navigate to the "Users" section in the application.
 - Click on the "Add User" button / Form to create a new User profile.
 - Input the required details, including User name, contact information, and any additional details.

Users

The screenshot displays the 'Add User details' form within the Leaftech Software application. The interface includes a dark sidebar with a navigation menu and a main content area with a light blue header and a white form body. The sidebar menu lists various sections like 'Chart Reports', 'Employee report', 'Pending Records', 'Filter Report', 'Non-family Report', 'Customer master', 'All Customer', 'User (Employee) Master', 'Add User' (highlighted), 'All Users', 'Calls History', 'Profile', 'Lead Customers', 'Prospect', 'Onboarding', 'In Active', 'Department master', 'Department', 'Service master', and 'Services'. The main content area has a header with the 'Add User details' title and a 'Logout' link. The form itself is organized into two columns. The left column contains fields for 'First Name' (with a mandatory asterisk), 'Email Id' (with a mandatory asterisk), 'Department' (a dropdown menu), 'Select higher authorities' (a dropdown menu), 'Password' (with a mandatory asterisk), and 'Age' (with a mandatory asterisk). The right column contains fields for 'Last Name' (with a mandatory asterisk), 'Mobile Number', 'Select designation' (a dropdown menu), 'Username' (with a mandatory asterisk), 'Date of Birth' (with a date picker icon), and 'Gender' (a dropdown menu). A green 'Add New User' button is positioned at the bottom of the form. A note at the bottom of the form states: '(Note : Fields with * are mandatory.)'.

Leaftech Software

Admin | Dashboard

Logout

Home / User

Add User details

First Name * Enter Name

Last Name * Enter Name

Email Id * Email id

Mobile Number Mobile Number

Department Select Department

Select designation Select

Select higher authorities Select

Username Enter username

Password Enter password

Date of Birth dd-mm-yyyy

Age Enter age

Gender Select

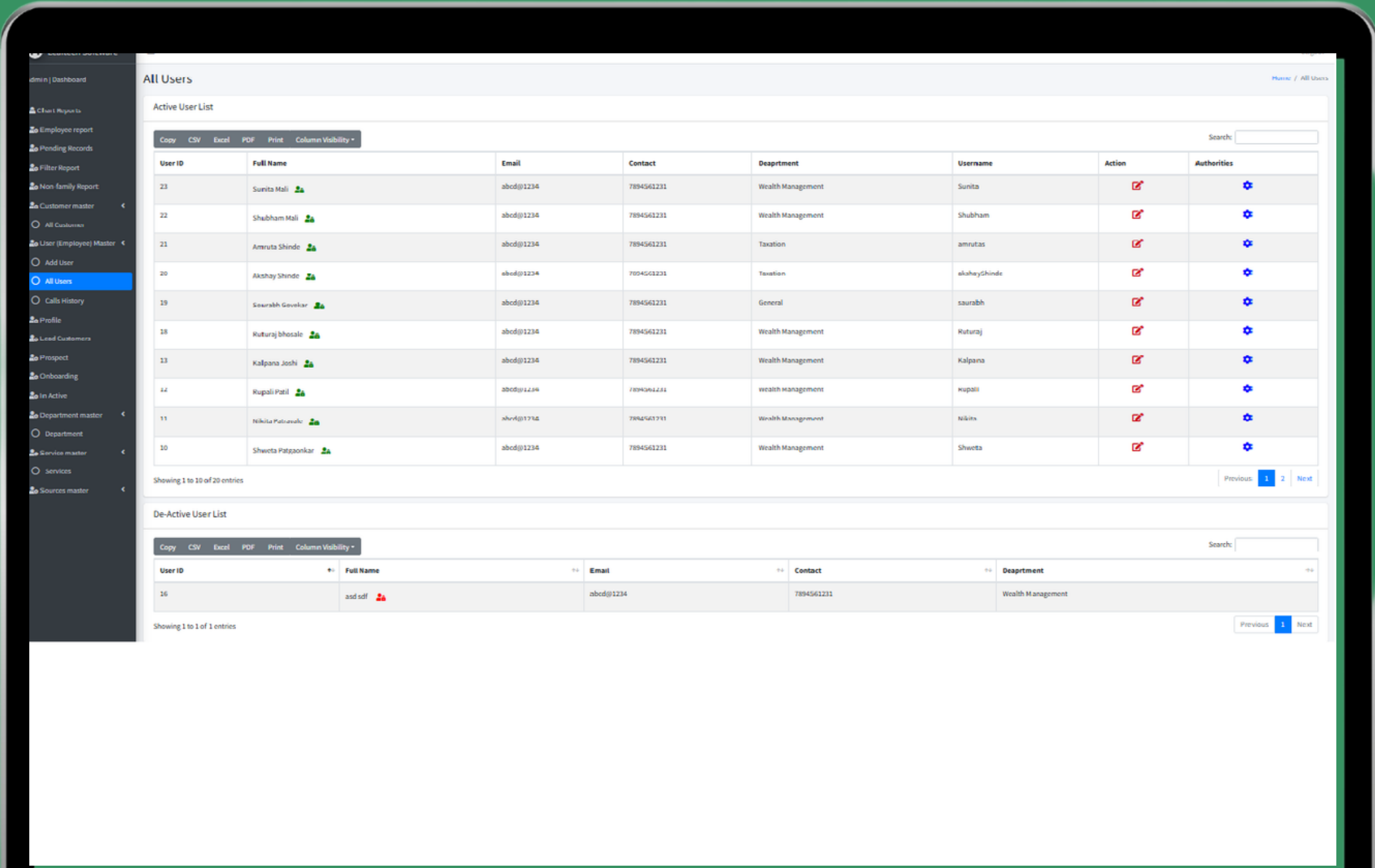
(Note : Fields with * are mandatory.)

Add New User

Masters

Users

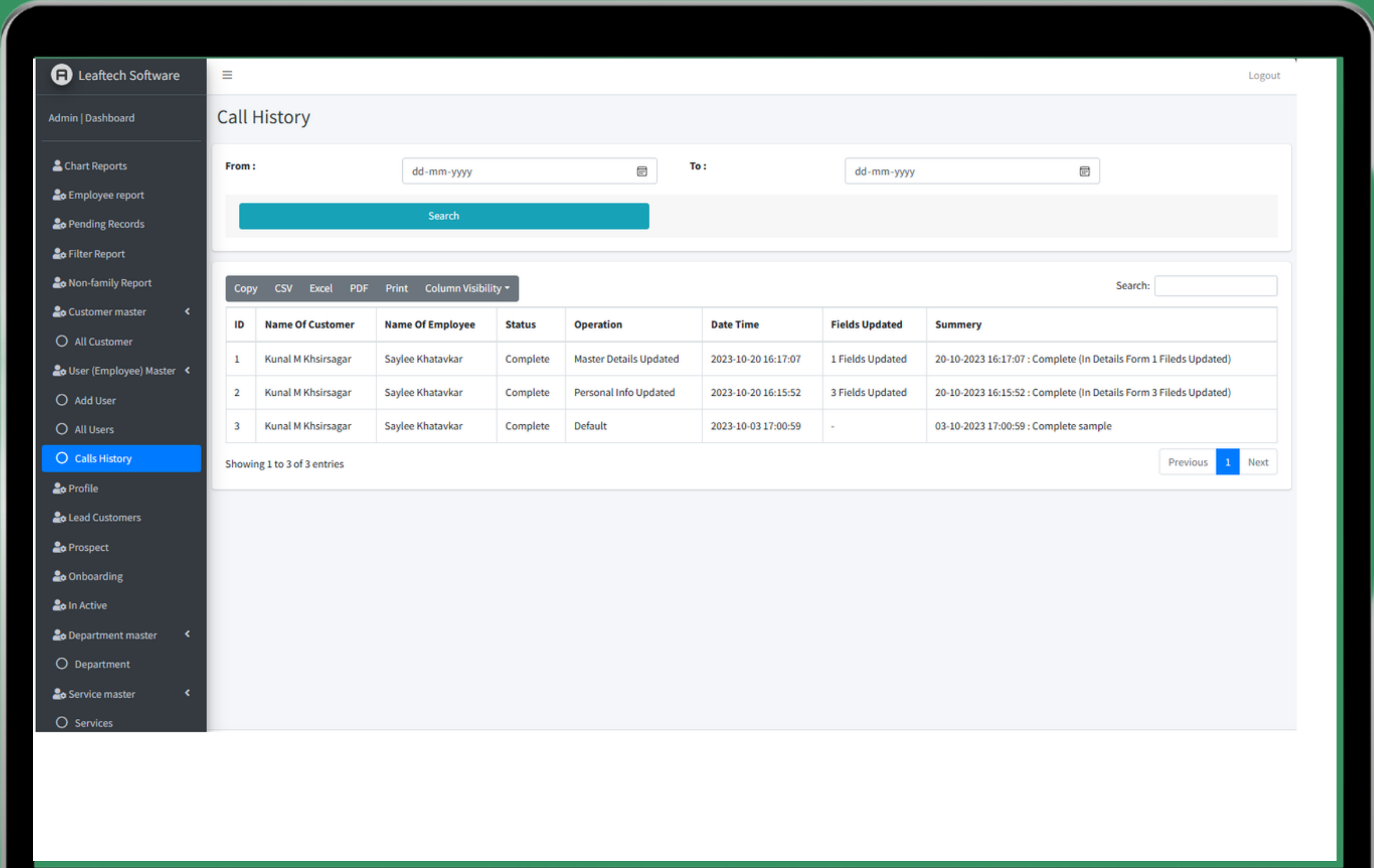
- 1. Accessing Users List:
 - Navigate to the "Customers" section in the application.
 - Explore the complete list of registered Users for a quick overview.
- 2. Viewing User Details from the List:
 - From the user list, click on the name of a user to access detailed information.
- 3. Filtering and Sorting Options:
- 4. Utilize filtering User Information:
 - To update user details, click the "Edit" button on the user profile.
 - Input the necessary changes and save the updated information.
- 5. Exporting, Updating and Deleting :
 - Exporting list in CSV, Excel, PDF, Print.



Masters

Users

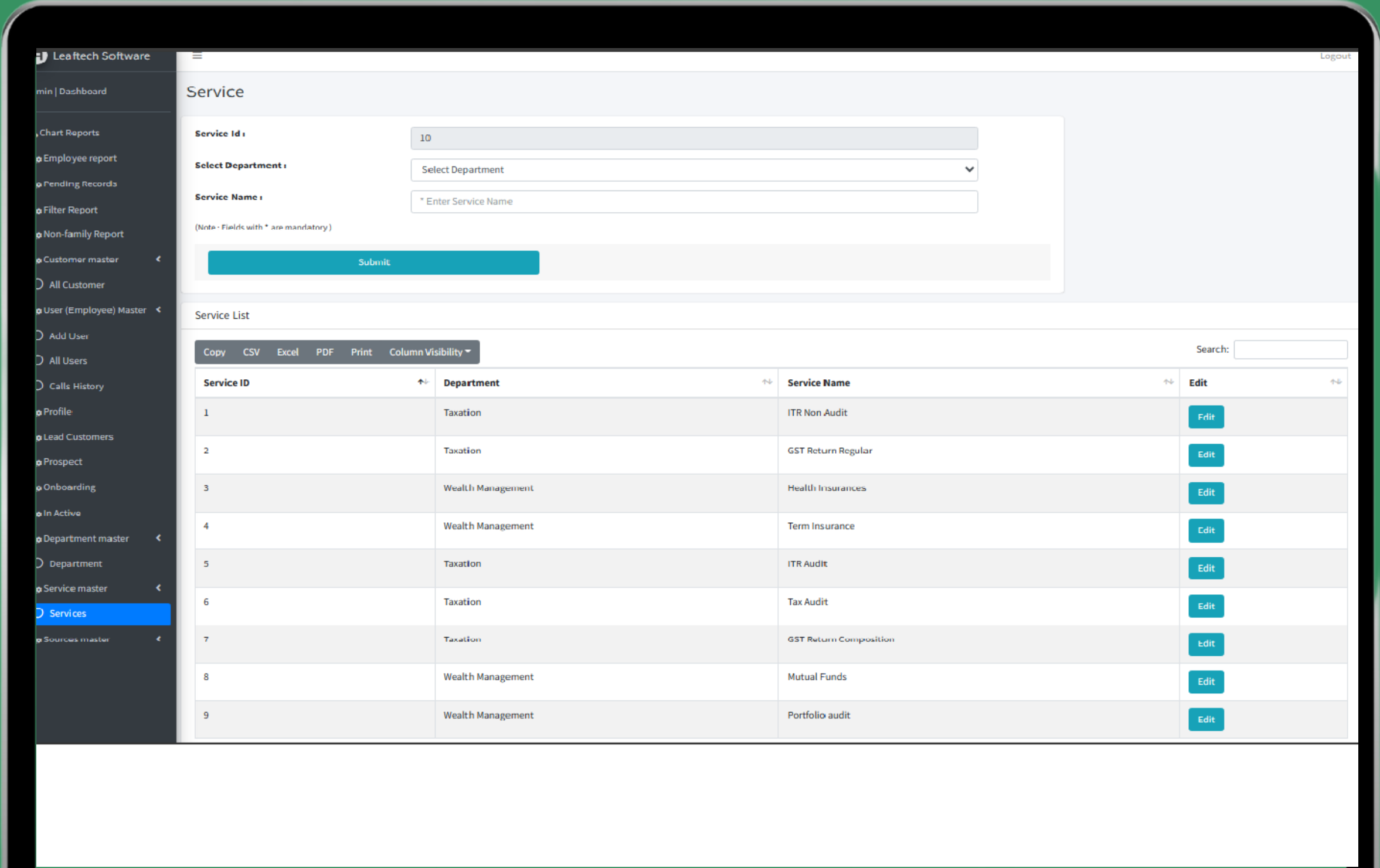
- Viewing Call History of User from Certain time period by using date form
- Exporting, Updating and Deleting : Exporting list in CSV, Excel, PDF, Print.



Masters

Service

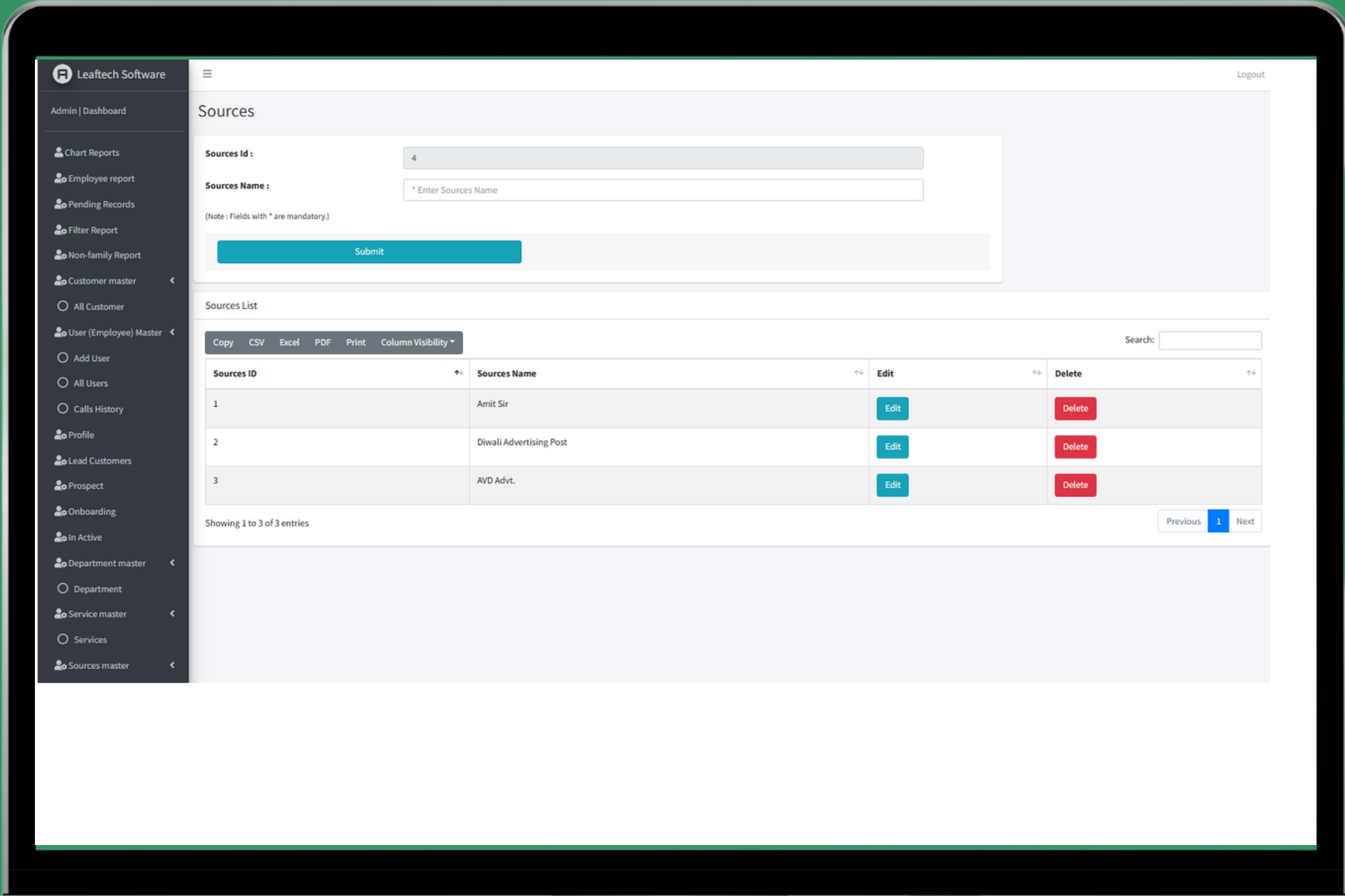
- Viewing Services Report by using form and updating the data.
- Exporting, Updating and Deleting :
Exporting list in CSV, Excel, PDF, Print.



Masters

Source

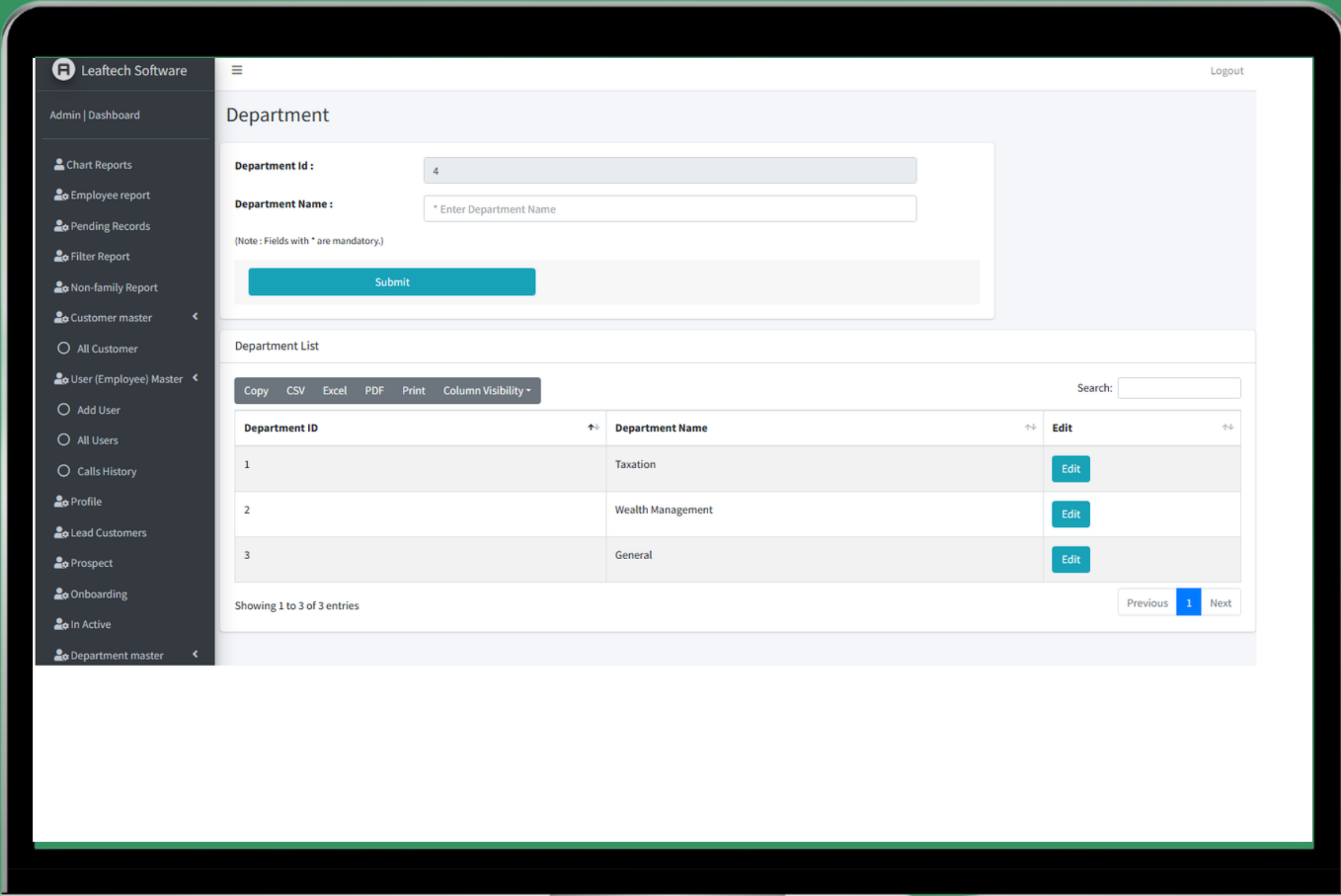
- Viewing Sources Report by using form and updating the data.
- Exporting, Updating and Deleting :
Exporting list in CSV, Excel, PDF, Print.



Masters

Department

- Viewing Department Id by using form and updating the data.
- Exporting, Updating and Deleting :
Exporting list in CSV, Excel, PDF, Print.



Masters

- Active customers list and all user list
- Click on Export customer details to access and edit their information.
- Click on Export master details to access and edit their information.
- Click on Export call details to access and edit their information.

Customers

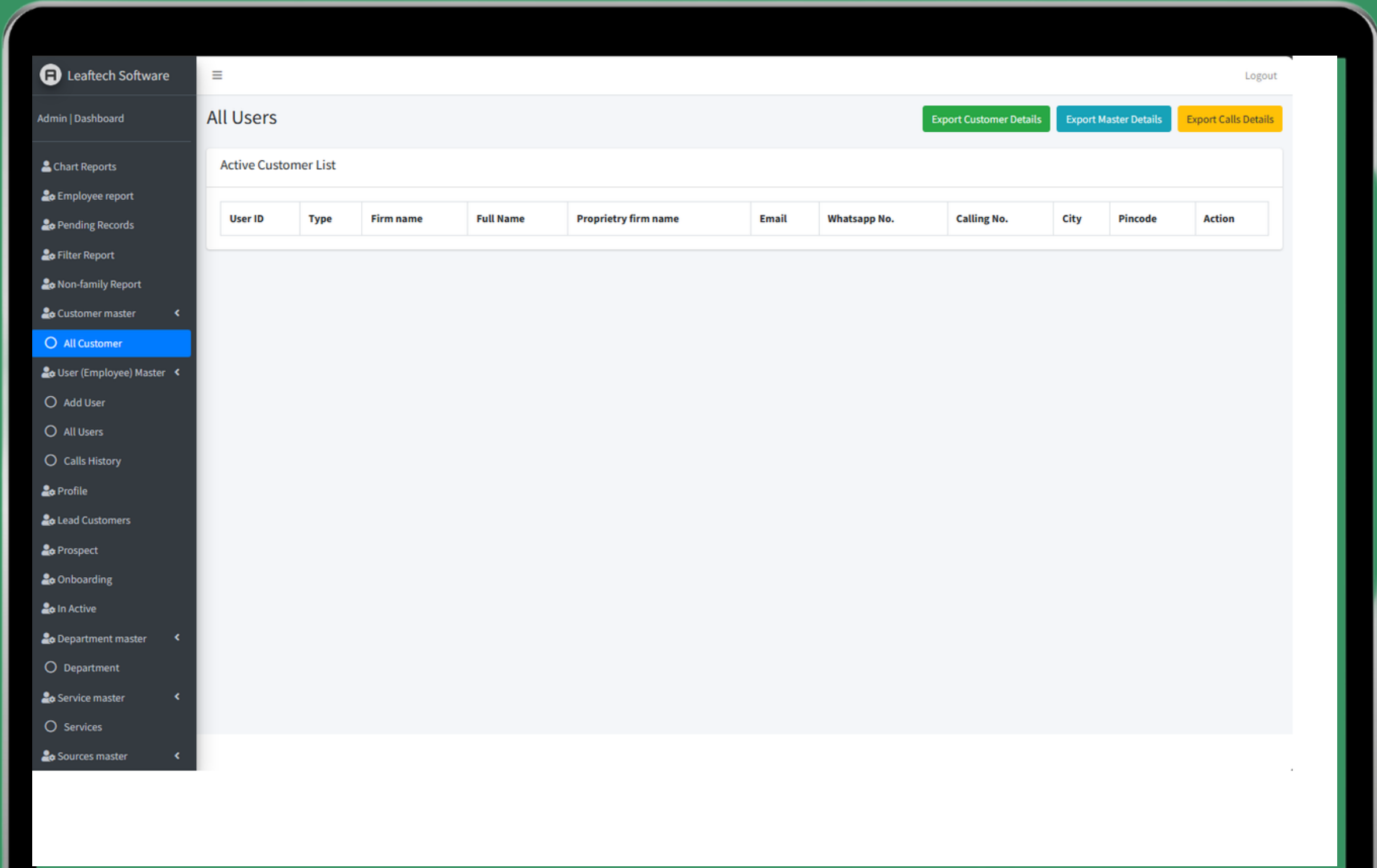
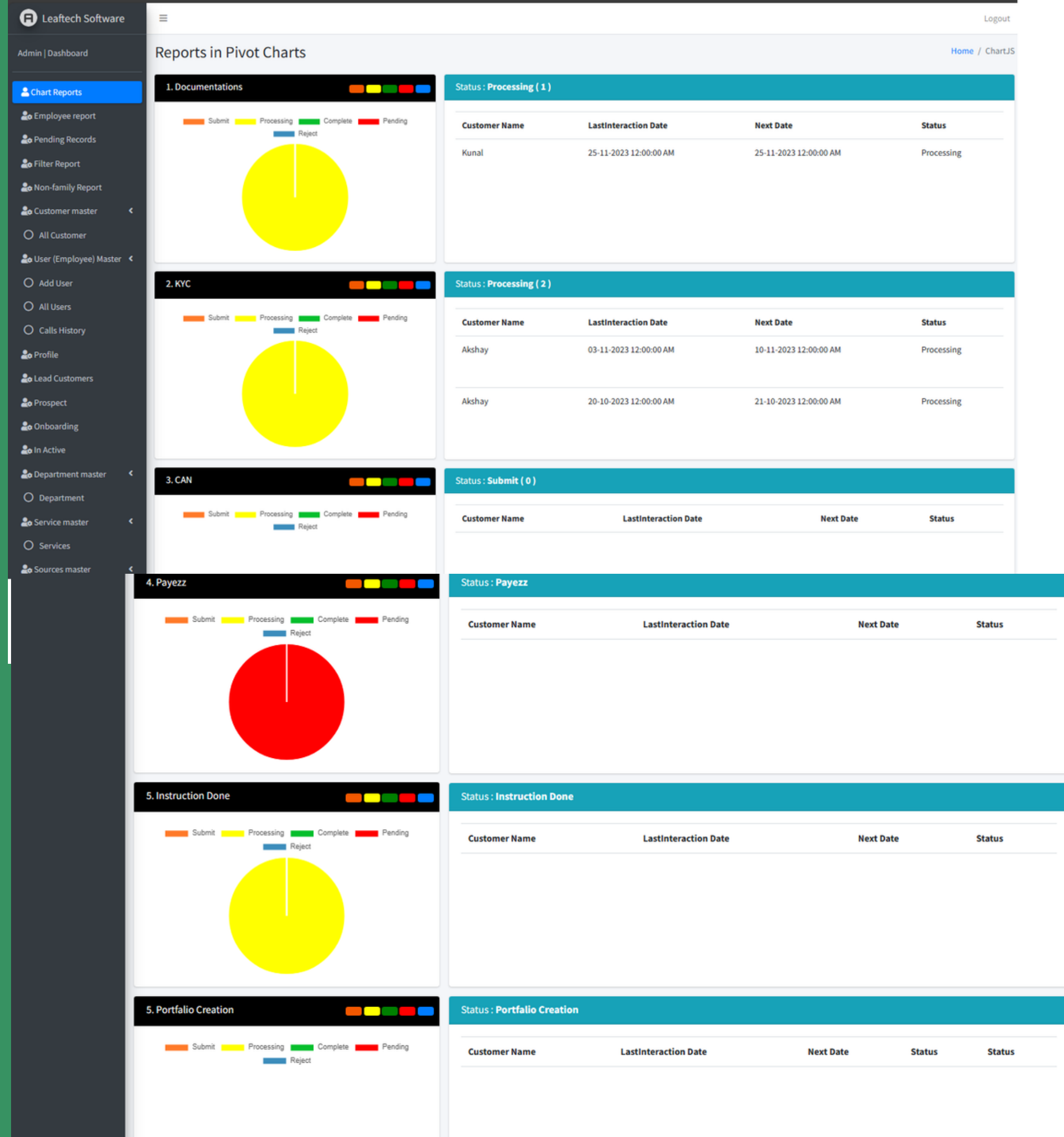


Chart Report

— Chart Report is all about analysis of the work that either it is submitted/ In Process/Completed/Pending/ Rejected

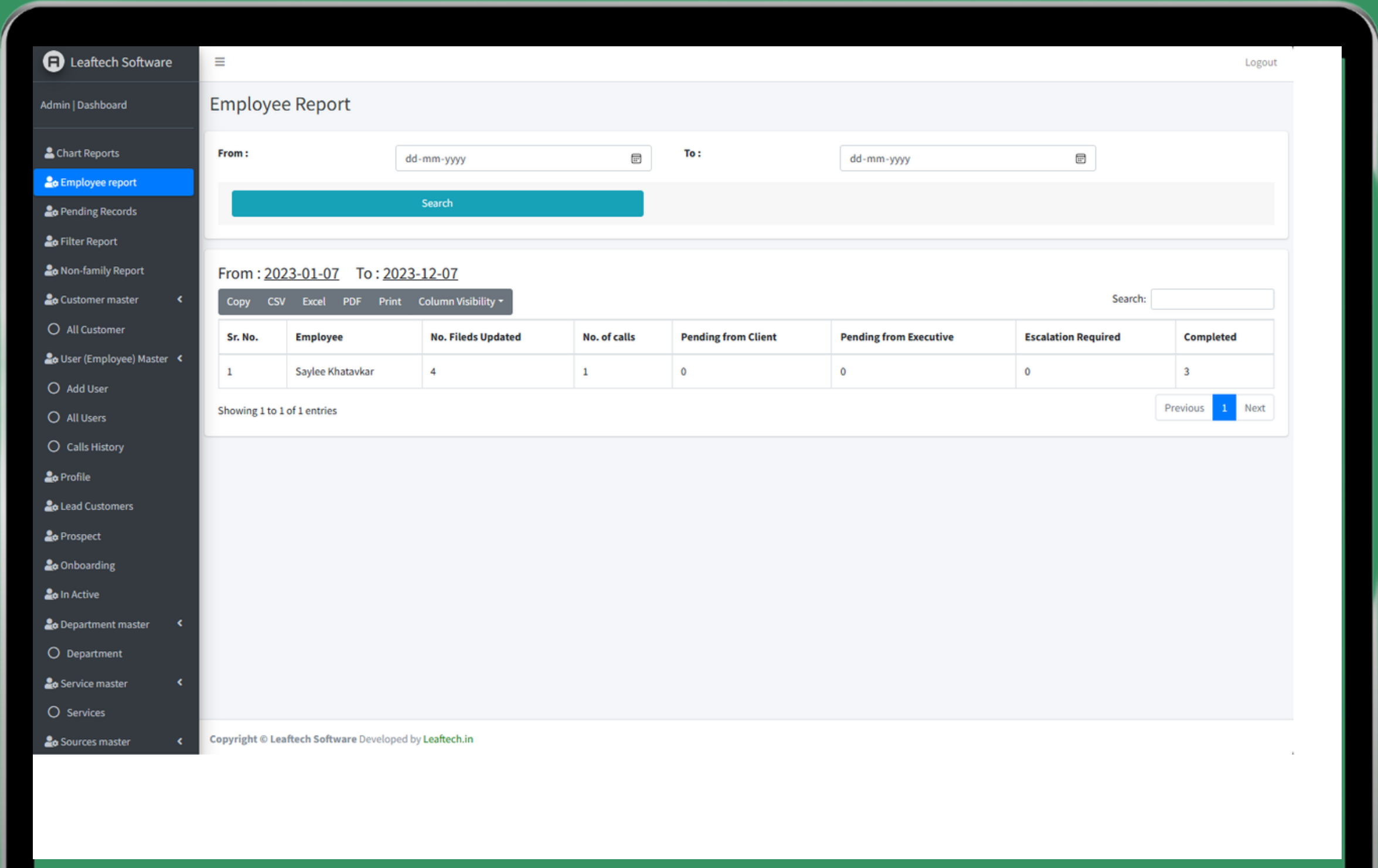
— It shows a Flow chart in front on the bais of the following work which is submitted/In Process/Completed/ Pending/ Rejected



Masters

Employee Report

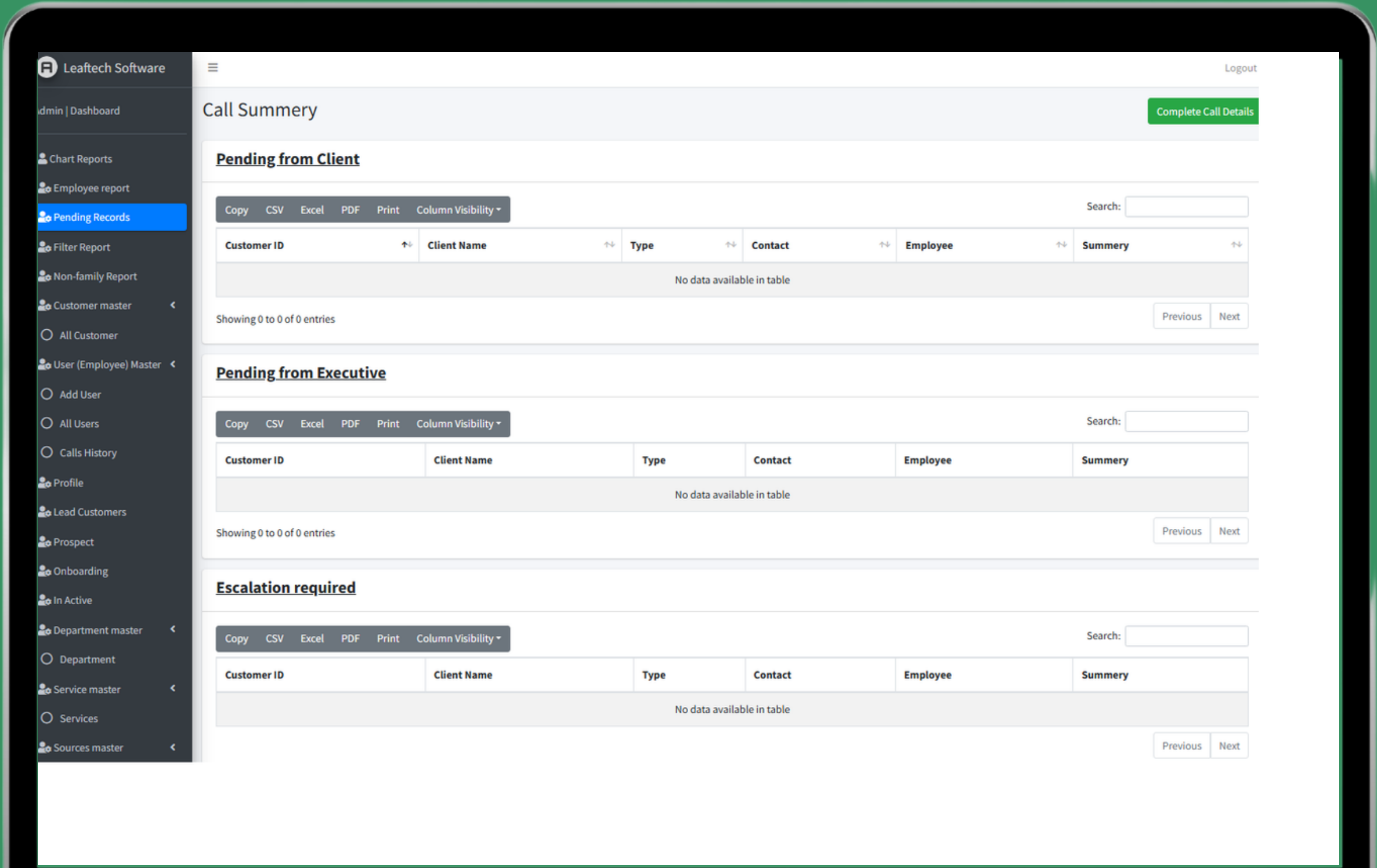
- Viewing Employee Report from Certain time period by using date form
- Exporting, Updating and Deleting :
Exporting list in CSV, Excel, PDF, Print.



Masters

- We can View, Update and complete pending records of clients can Exporte, Update and Delete records, Exporte list in CSV, Excel, PDF, Print.
- We can View, Update and complete pending records of Executive can Exporte, Update and Delete records, Exporte list in CSV, Excel, PDF, Print.
- We can View, Update and Escalate pending records/work and can Exporte, Update and Delete records, Exporte list in CSV, Excel, PDF, Print.

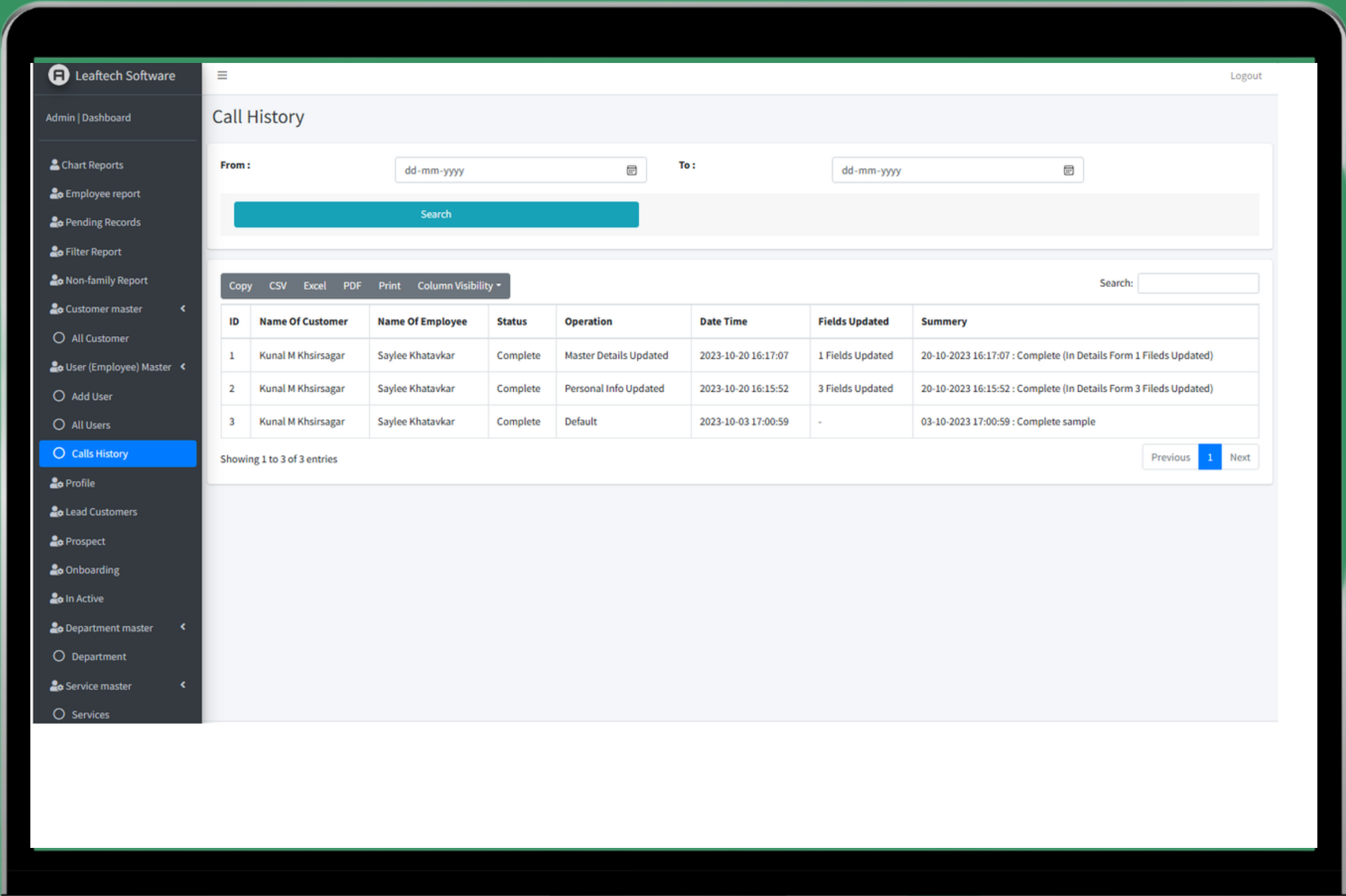
Pending Records



Masters

— We can check users particular call record from specific date records/work and can Exporte, Update and Delete records, Exporte list in CSV, Excel, PDF, Print.

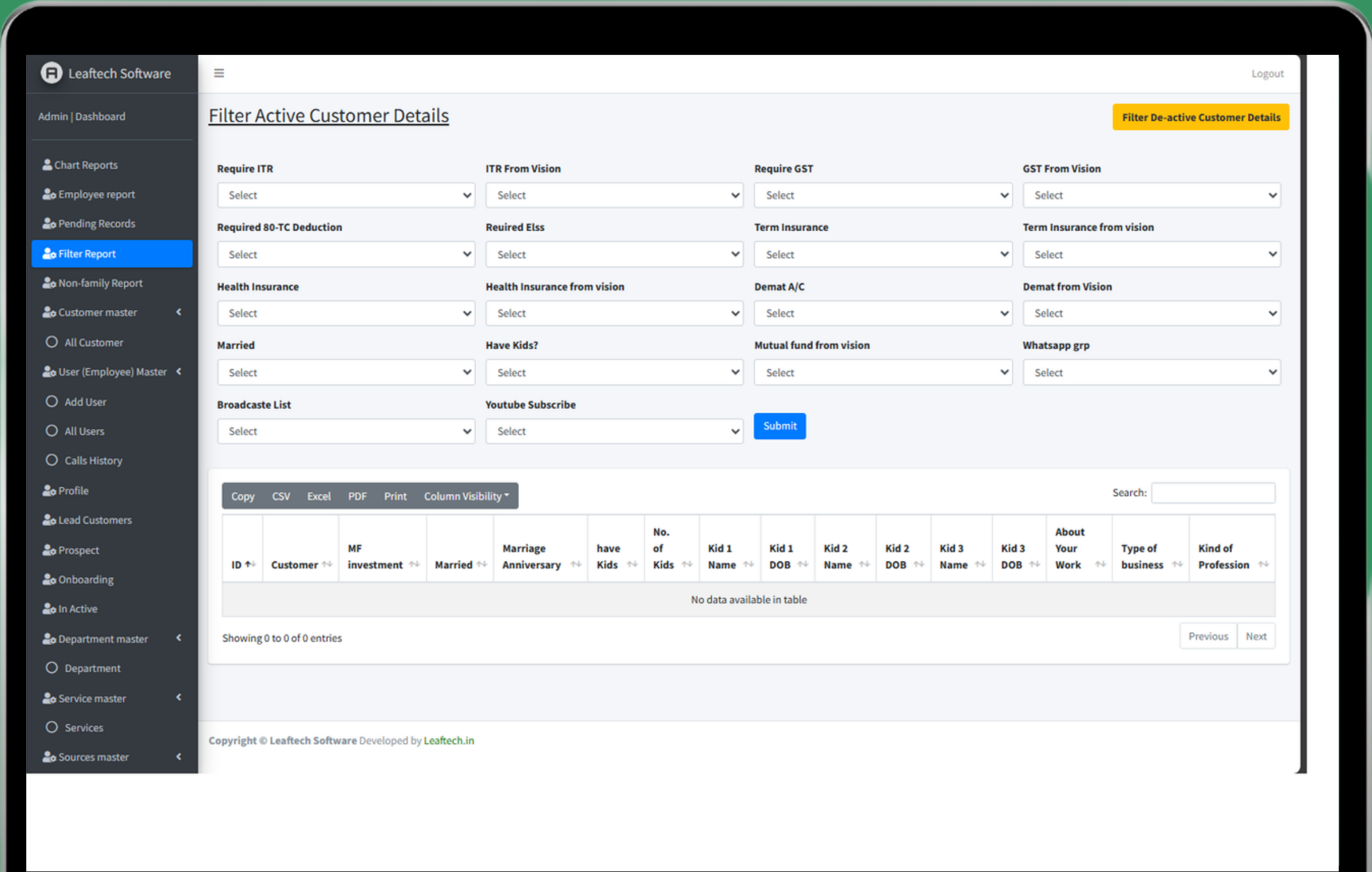
Call History



Masters

We can Filter active customers details using several activites shown on image and can Exporte, Update and Delete records, Exporte list in CSV, Excel, PDF, Print.

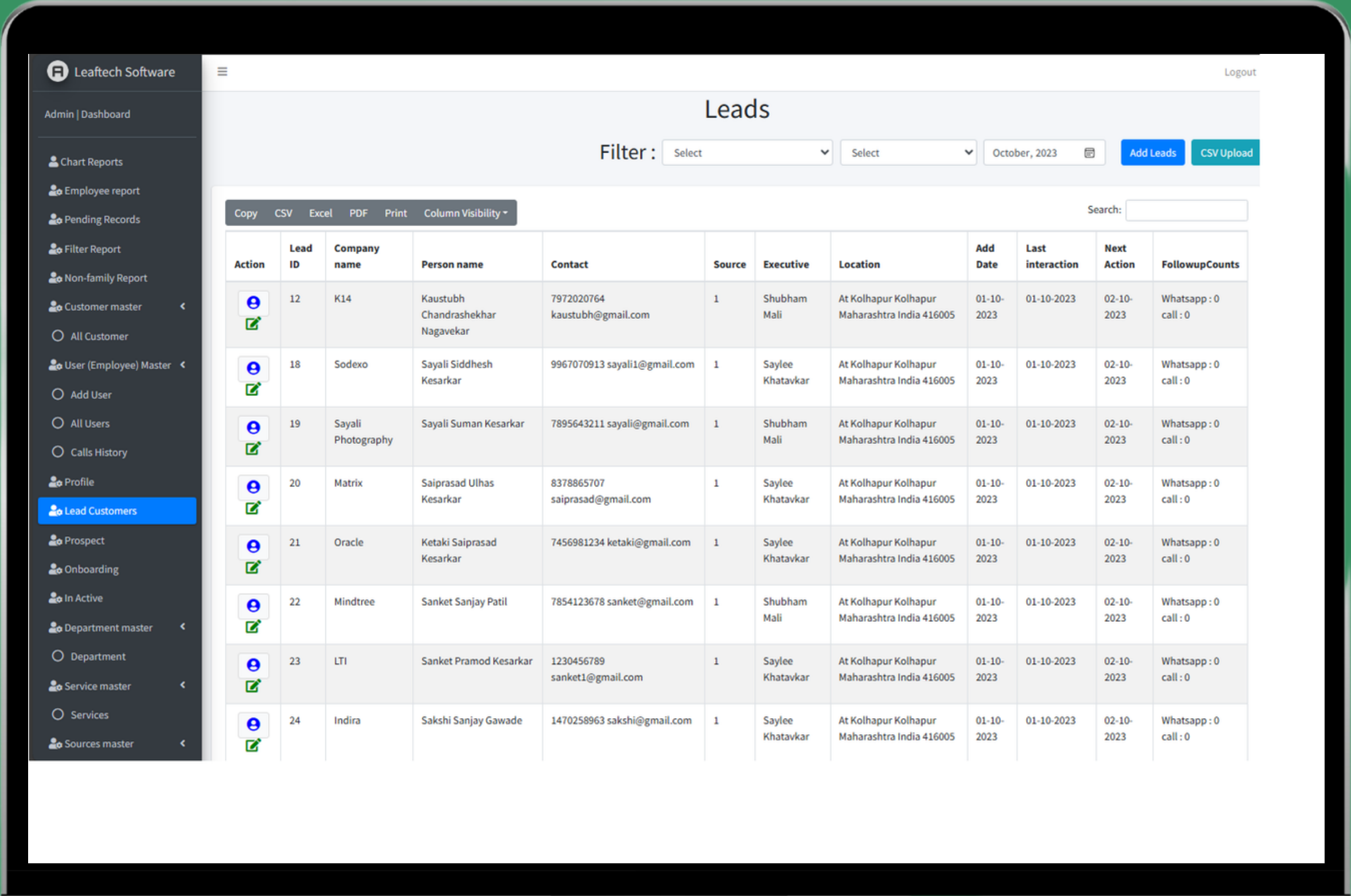
Filter Reports



Masters

Lead Customer

- Viewing Employee Report from Certain time period by using date form
- Exporting, Updating and Deleting
Exporting list in CSV, Excel, PDF, Print.



Masters

Lead Customer

Adding a New Lead Customer

- Navigate to the "Customers" section in the application.
- Click on the "Add Customer" button / Form to create a new customer profile.
- Input the required details, including customer name, contact information, and any additional details.

The screenshot displays the 'Add New Lead Customer' form within the Leaftech Software application. The interface includes a dark sidebar with navigation options such as 'Admin | Dashboard', 'Chart Reports', 'Employee report', 'Pending Records', 'Filter Report', 'Non-family Report', 'Customer master', 'User (Employee) Master', 'Add User', 'All Users', 'Calls History', 'Profile', 'Lead Customers', 'Prospect', 'Onboarding', 'In Active', 'Department master', 'Department', 'Service master', 'Services', and 'Sources master'. The main form area is titled 'Add New Lead Customer' and contains the following fields:

- Company Name:** A text input field with a placeholder '* Enter Name'.
- Abbr.:** A dropdown menu with 'Mr' selected.
- First Name:** A text input field with a placeholder '*Enter'.
- Middle Name:** A text input field with a placeholder '*Enter'.
- Last Name:** A text input field with a placeholder '*Enter'.
- Email Id:** A text input field with a placeholder '* Email id'.
- Mobile Number:** A text input field with a placeholder 'Mobile Number'.
- Source:** A dropdown menu with 'Select' selected.
- Executive:** A dropdown menu with 'Select' selected.
- Street Address:** A text input field with a placeholder 'Enter'.
- Country:** A text input field with a placeholder 'Enter'.
- State:** A dropdown menu with 'Select State' selected.
- city:** A dropdown menu with 'Select City' selected.
- pincode:** A dropdown menu with 'Select Pincode' selected.
- Needs:** A text input field with a placeholder 'Enter'.
- Notes:** A text input field with a placeholder 'Enter'.
- Status:** A dropdown menu with 'Lead' selected.

At the bottom of the form, there is a green button labeled 'Add New Lead'. A note at the bottom left states: '(Note : Fields with * are mandatory.)'. The top right corner of the application shows a 'Logout' link and a breadcrumb trail: 'Home / New Lead Customer'.

Masters

Here in Prospect there are Interested, meeting Schedule, meeting Done, Converted, Lost tabs.

We can visualize if the customer is in Interested or in Meeting Schedule or Meeting Done or Converted or Lost.

If one of The customer is about to schedule meeting or want to move to next or into previous stage we can do it through arrow assigned to that particular customer \

Now we want to add details to that particular customer

we can click on that particular customer and new \window will be pop up and we can fill details of Interaction or Next Interaction Field and we can add next Interaction Date and we can change the status as well and we can send details to Same goes

with Meeting Schedule, Meeting Done process

If you want to filter out with that particular employee details

of customer we can do it using Filter option given on the top

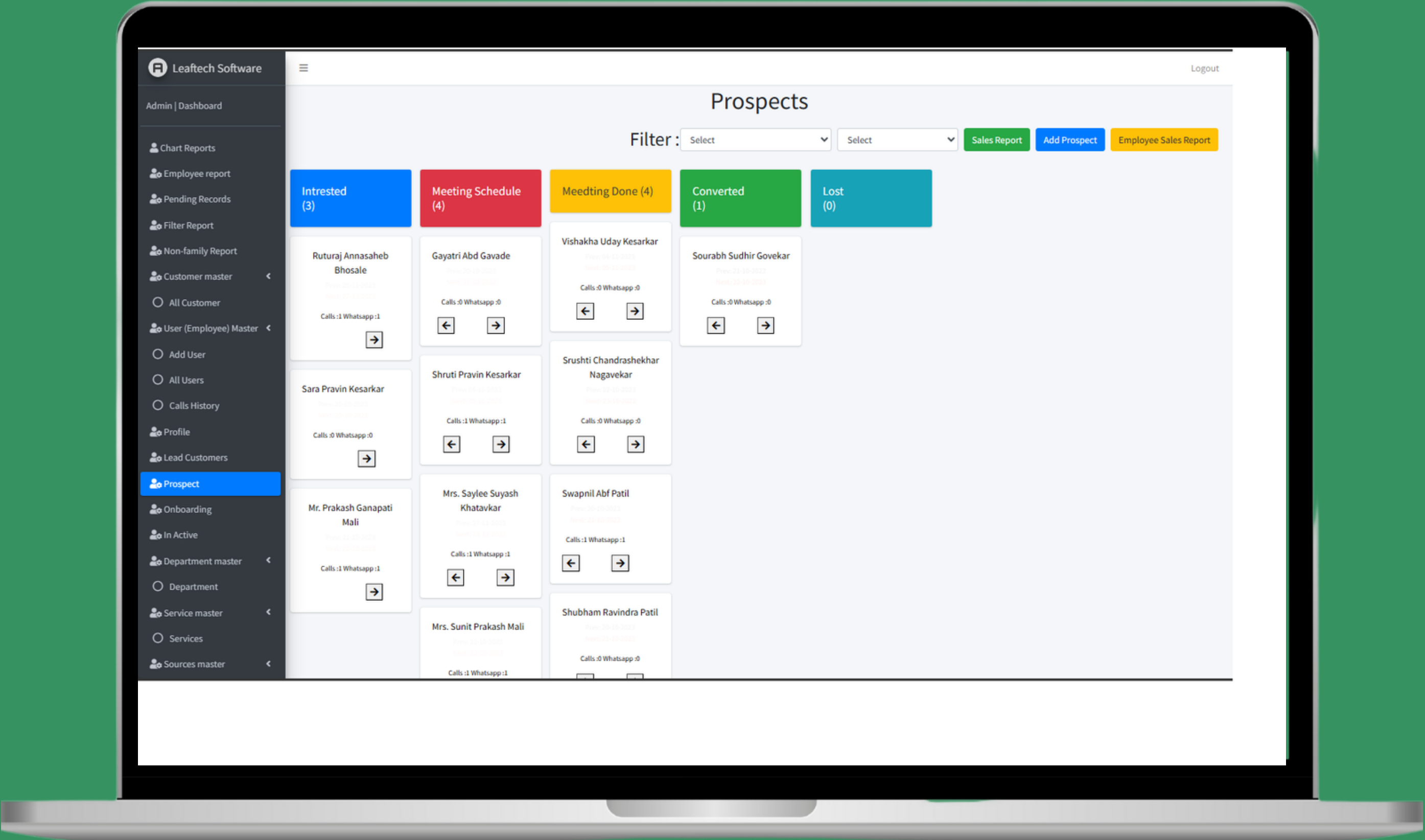
If you want to add a new Prospecct we can do it through clicking on Add prospect or if want to view

Employee sales report filtering using date ways

we can do it by clicking on Employee Sales Report

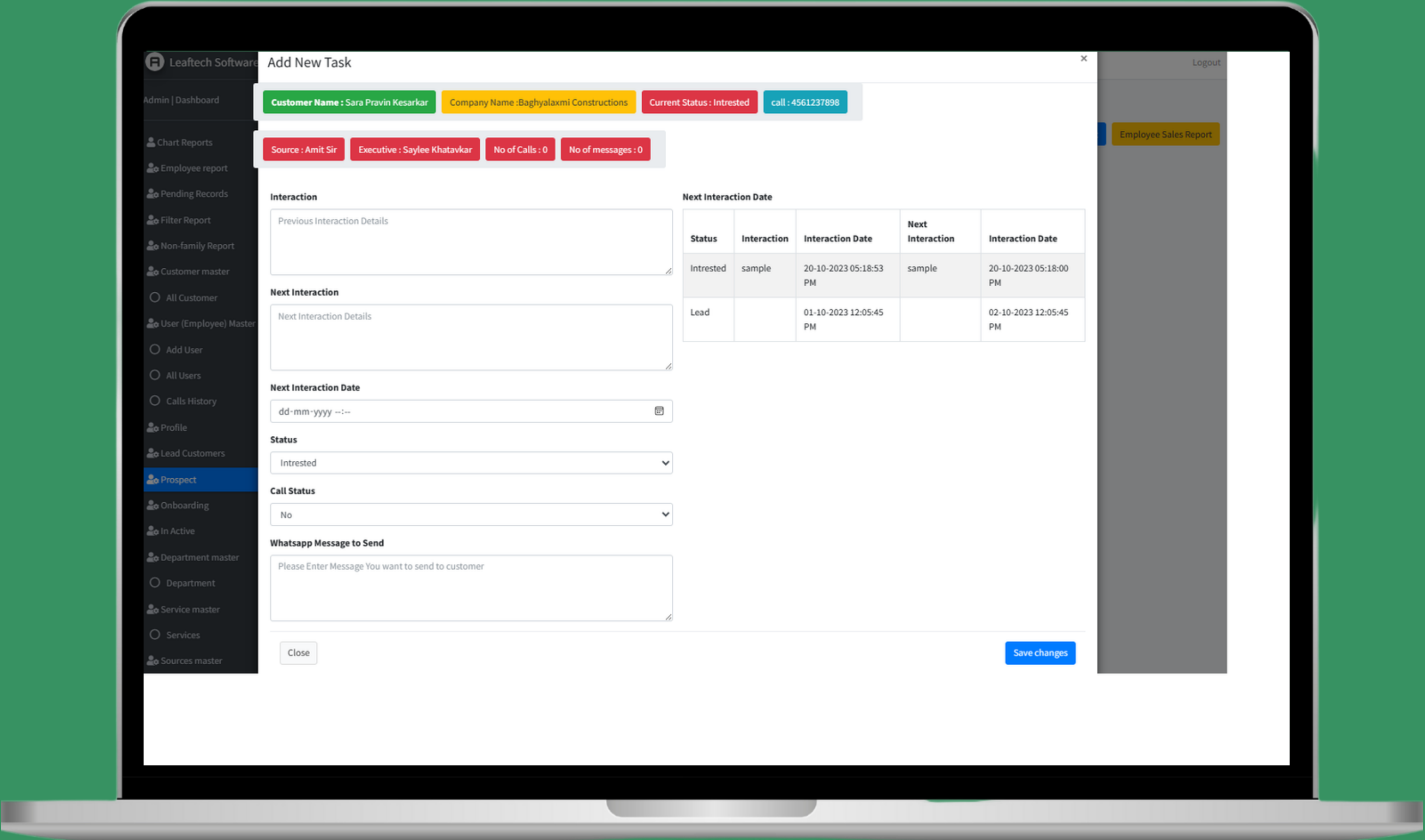
button, also we can view details of Sales Report by clicking on Sales Report

Prospect



Masters

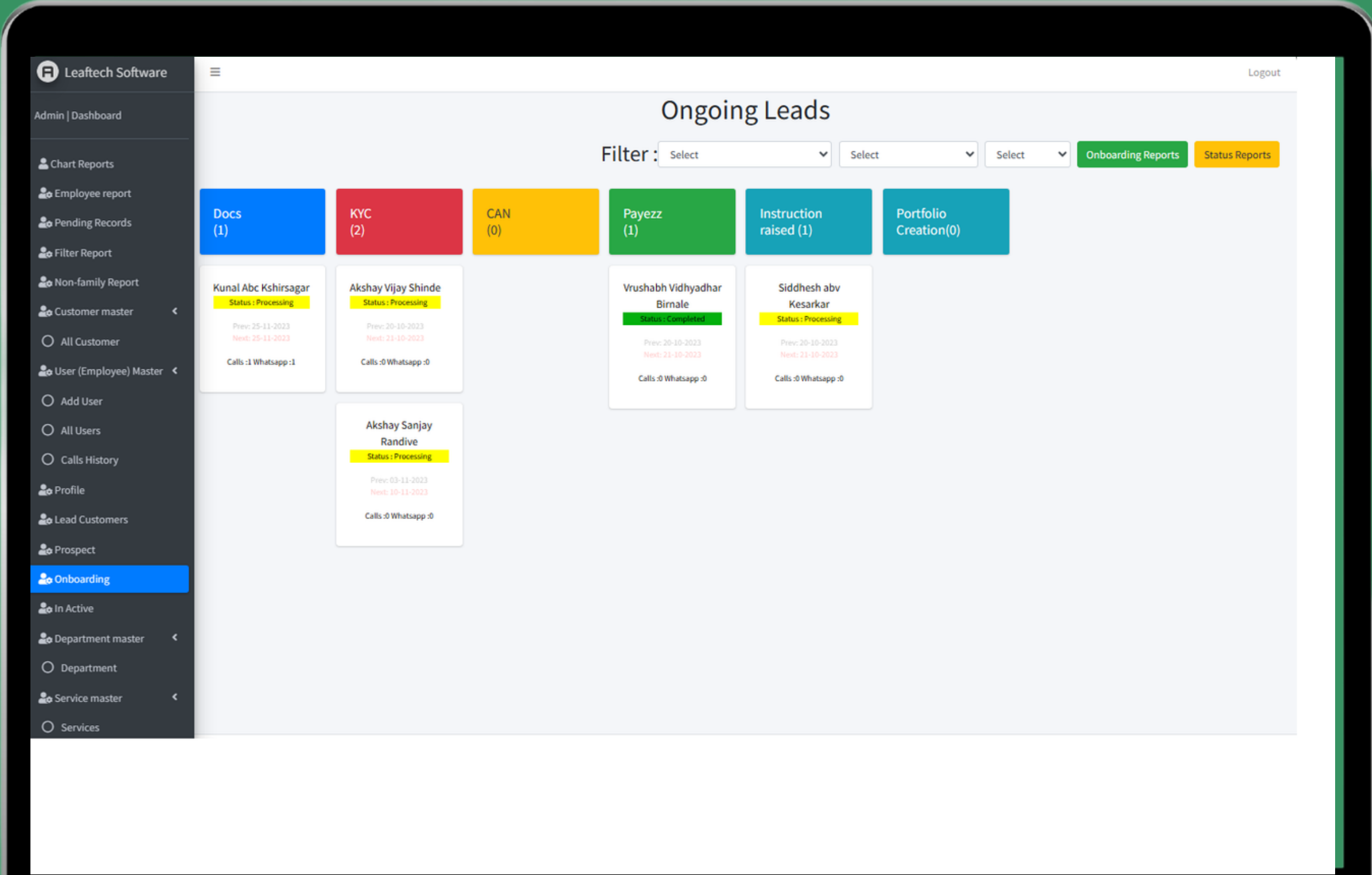
Prospect



Masters

On Onboarding, after the customer is converted there is a process to join Documentation, KYC, CAN, Payezz, Instruction raised, Portfolio Creation.

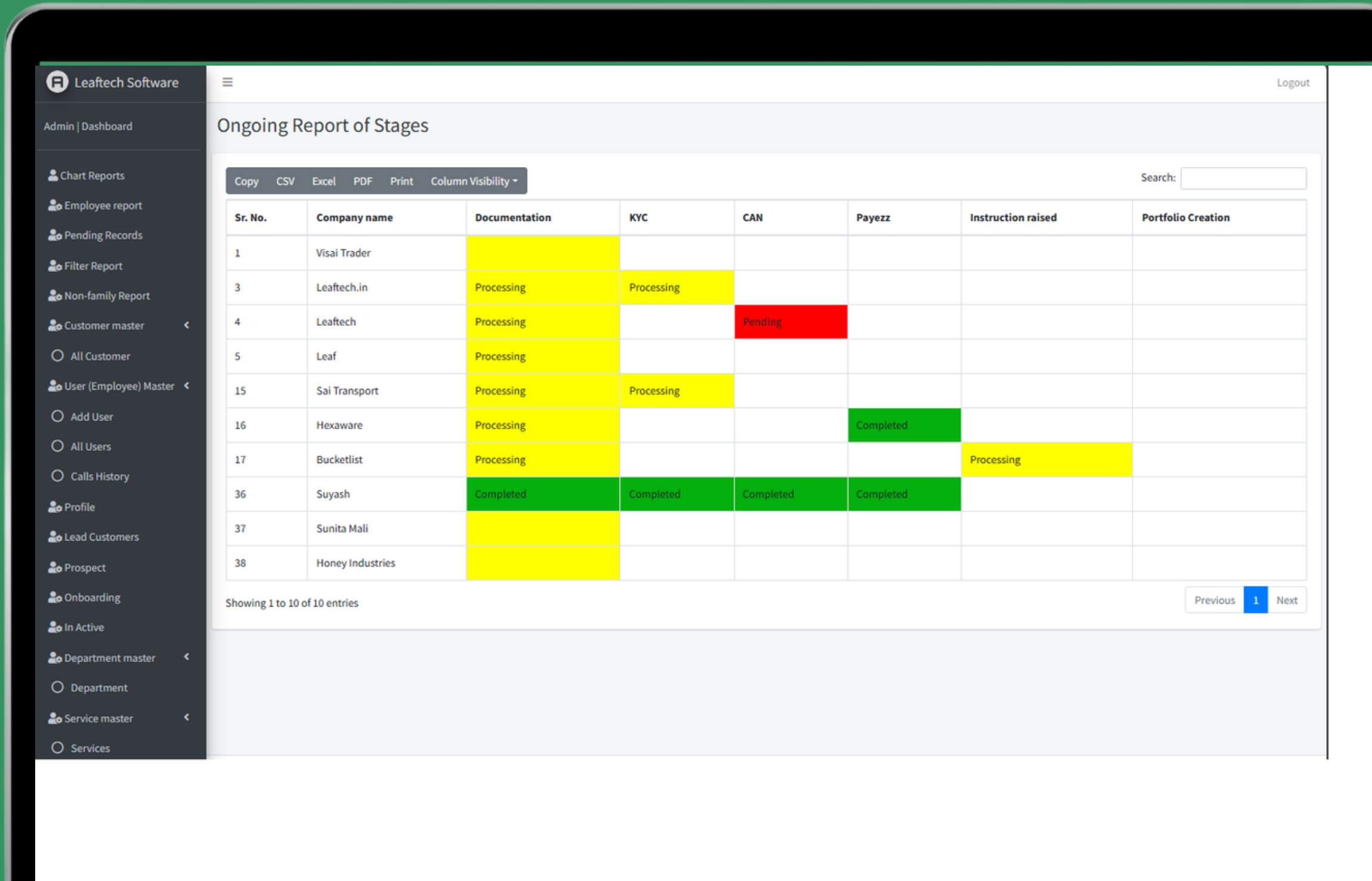
Onboarding Leads



Masters

As the process starts with Documentation then it goes to KYC then it goes to CAN then it goes to Payezz, if there is instruction raised then the last process is Portfolio Creation.

Onboarding Leads



The screenshot displays the 'Ongoing Report of Stages' interface in the Leaftech Software. The interface includes a sidebar with navigation options and a main table showing the progress of 10 leads through various stages of the onboarding process.

Leaftech Software
Admin | Dashboard

Navigation Menu:

- Chart Reports
- Employee report
- Pending Records
- Filter Report
- Non-family Report
- Customer master
 - All Customer
- User (Employee) Master
 - Add User
 - All Users
 - Calls History
- Profile
- Lead Customers
- Prospect
- Onboarding
- In Active
- Department master
 - Department
- Service master
 - Services

Ongoing Report of Stages

Copy CSV Excel PDF Print Column Visibility Search:

Sr. No.	Company name	Documentation	KYC	CAN	Payezz	Instruction raised	Portfolio Creation
1	Visai Trader						
3	Leaftech.in	Processing	Processing				
4	Leaftech	Processing		Pending			
5	Leaf	Processing					
15	Sai Transport	Processing	Processing				
16	Hexaware	Processing			Completed		
17	Bucketlist	Processing				Processing	
36	Suyash	Completed	Completed	Completed	Completed		
37	Sunita Mali						
38	Honey Industries						

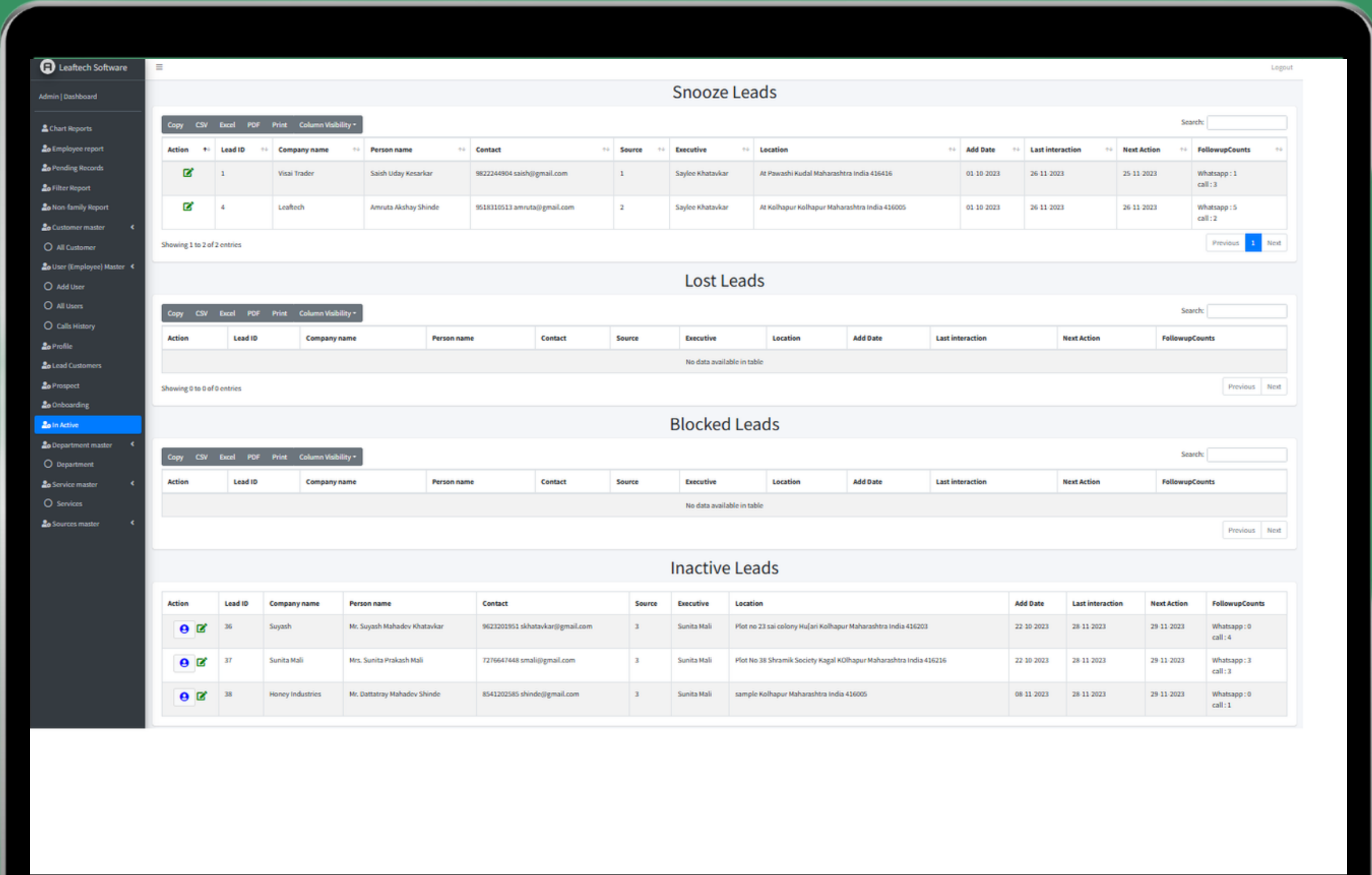
Showing 1 to 10 of 10 entries

Previous 1 Next

Masters

Inactive list, here we can find out that the customer who are not interested will be in the Inactive particular list. If the customer is not interested from the snooze one will be displayed in the snooze inactive list Same as if the customer is not interested from the Lost leads will be displayed in the lost lead or if the customer has blocked the campaign will get into blocked list.

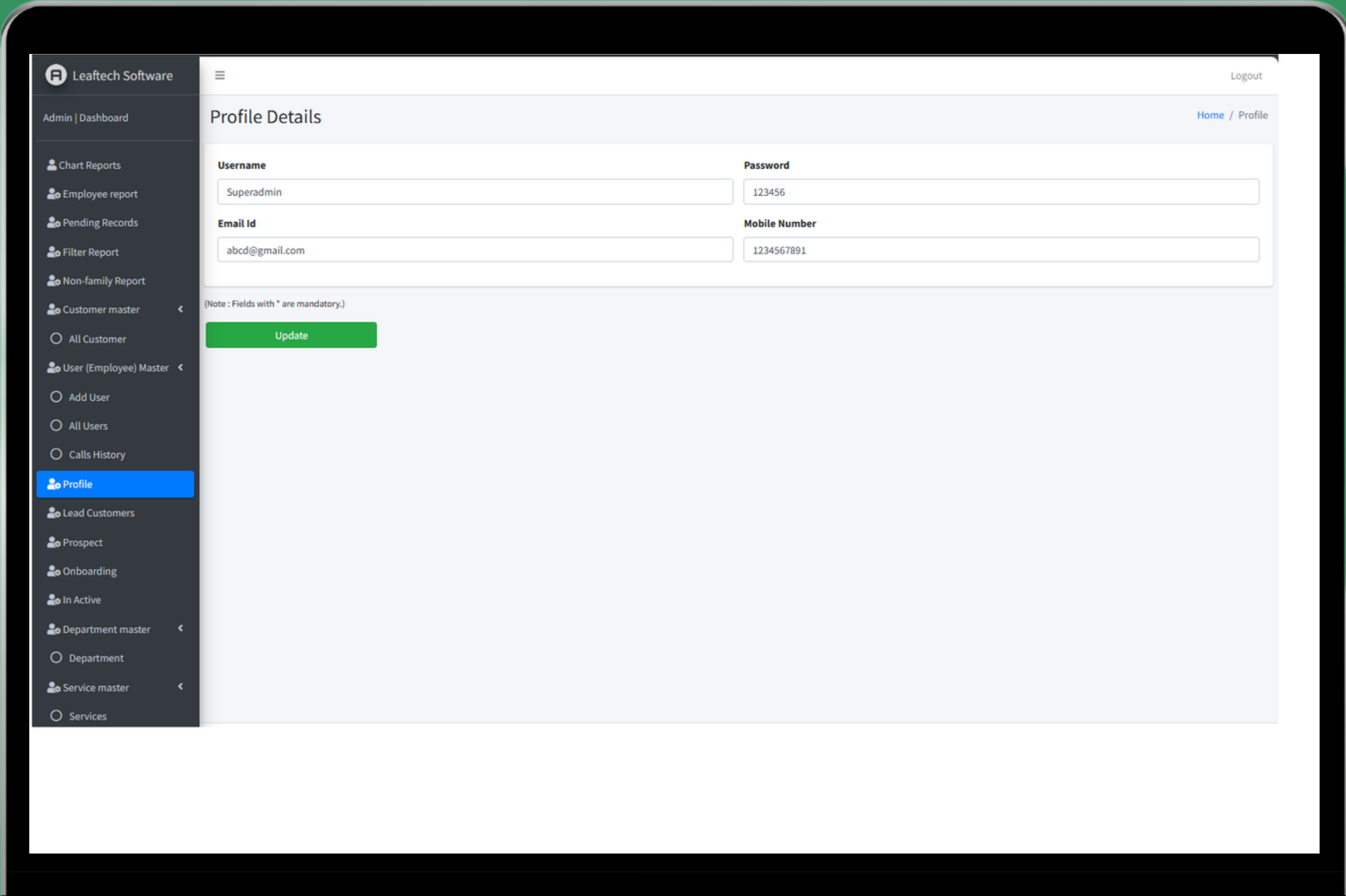
In Active



Masters

Add Profile details of user on certain form and Update the details using Update button

Profile

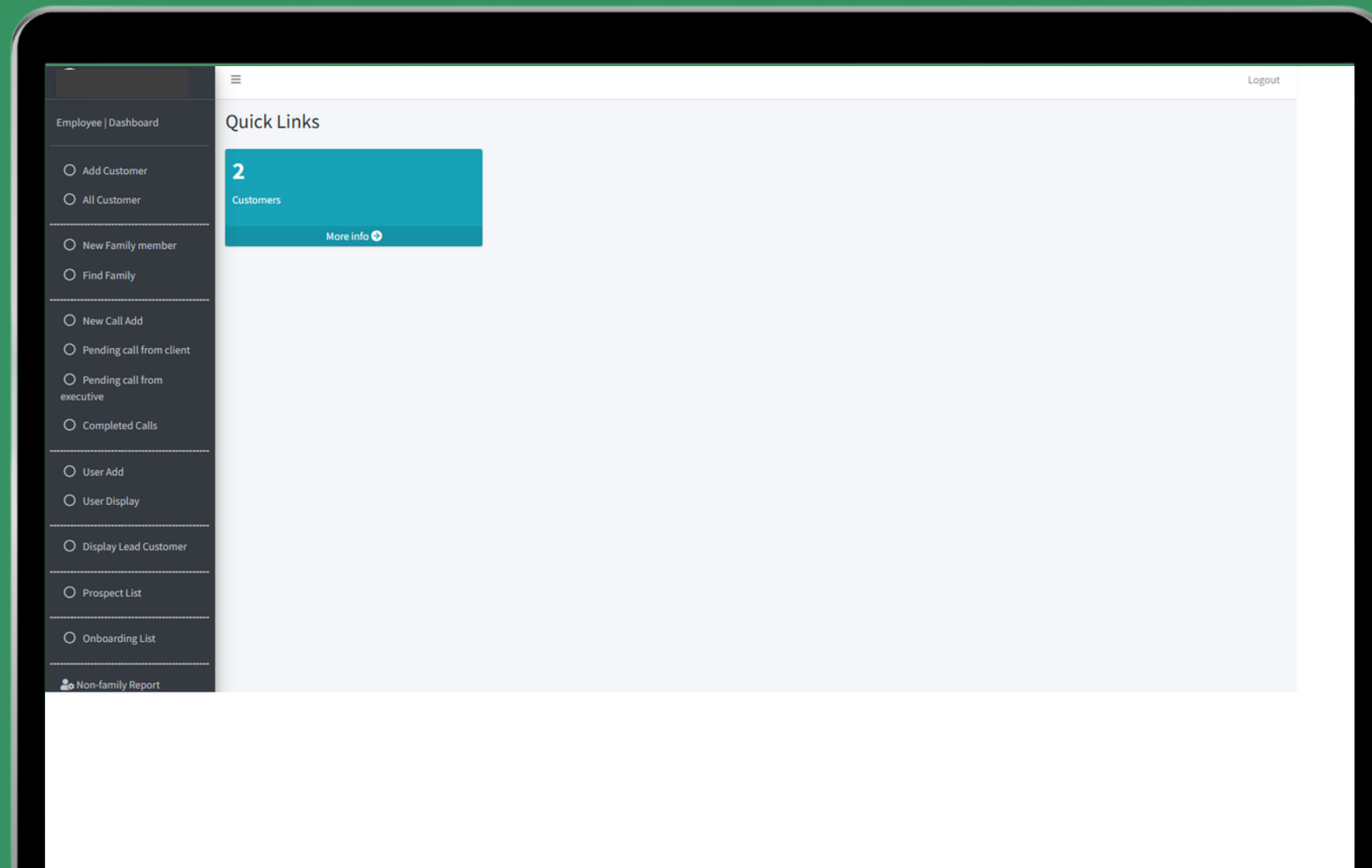


Dashboard Overview

Employee Login

The Dashboard provides a snapshot of

- Customers
- Employees
- Department
- Services



Masters

Customers

Adding a New Customer:

Navigate to the "Customers" section in the application.

Click on the "Add Customer" button / Form to create a new customer profile. Input the required details, including customer name, contact information, and any additional details.

2. Managing Customer Information:

Access the "Customers" section to view and manage a list of all registered customers.

Click on a customer's name to access and edit their information.

Employee | Dashboard

Add Customer

All Customer

New Family member

Find Family

New Call Add

Pending call from client

Pending call from executive

Completed Calls

User Add

User Display

Display Lead Customer

Prospect List

Onboarding List

Non-family Report

Filter Report

Employee Report

Department Master

Services Master

Logout

Home / Customer

Add Customer details

Customer Type

Select

First Name

* Enter Name

Middle Name

* Enter Name

Last Name

* Enter Name

Email Id

* Email id

Whatsapp Number

Whatsapp Number

Calling Number (☐ Same as whatsapp number)

Calling Number

Minor/Non Minor

Select

Vision Money Mantra Email Id

* Email id

Proprietry firm name

Enter Firm name

firm Type

☐ Partnership
☐ Pvt. Ltd.
☐ HUF

Department

Select Department

PAN Number

Enter PAN number

CAN Number

Enter CAN number

Taxation

☐ ITR Non Audit
☐ GST Return Regular
☐ ITR Audit
☐ Tax Audit
☐ GST Return Composition

Wealth Management

☐ Health Insurances
☐ Term Insurance
☐ Mutual Funds
☐ Portfolio audit

General

Permanant Address

Enter Permanant Address

Present Address (☐ Same as Permanant Address)

Enter Present Address

Masters

Customers

Key Functionalities:

1. Accessing Customer List:

- Navigate to the "Customers" section in the application.
- Explore the complete list of registered customers for a quick overview.

2. Viewing Customer Details from the List:

- From the customer list, click on the name of a customer to access detailed information.

3. Filtering and Sorting Options:

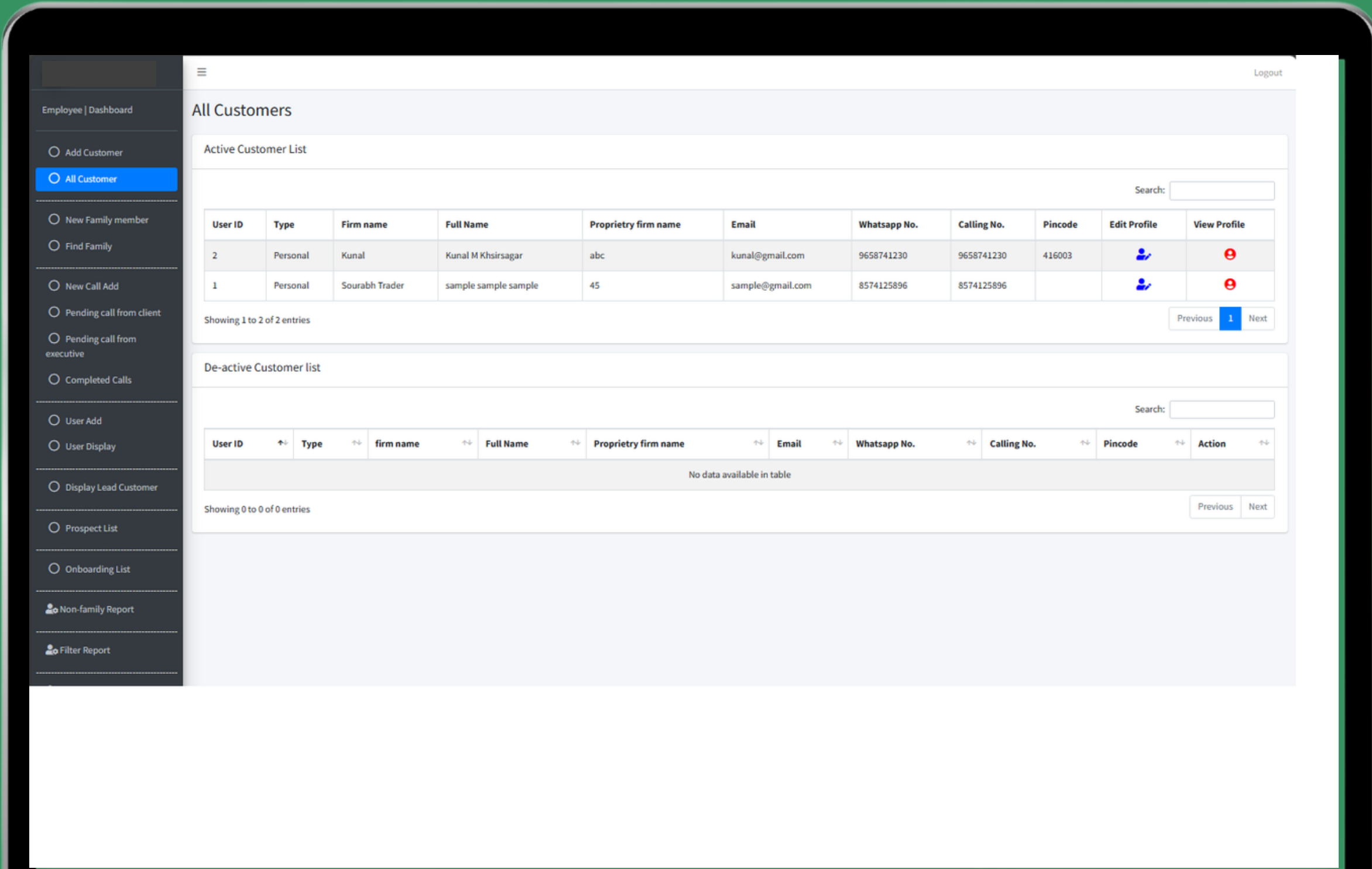
- Utilize filtering options to streamline your view based on customer status, alphabetical order, or other criteria.
- Experiment with sorting options to organize the list as per your preference.

4. Editing Customer Information:

- To update customer details, click the "Edit" button on the customer's profile.
- Input the necessary changes and save the updated information.

5. Exporting, Updating and Deleting :

Exporting list in CSV, Excel, PDF, Print.



Masters

Adding a New Family Member/New Customer:
Navigate to the "New Family Member" section in the application.

Click on the "Add Customer" button /
Form to create a new customer profile.
Input the required details, including
customer name, contact information,
and any additional details.

2. Managing Customer Information:
Access the "Customers" section to view
and manage a list of all registered
customers.

Click on a customer's name to access
and edit their information.

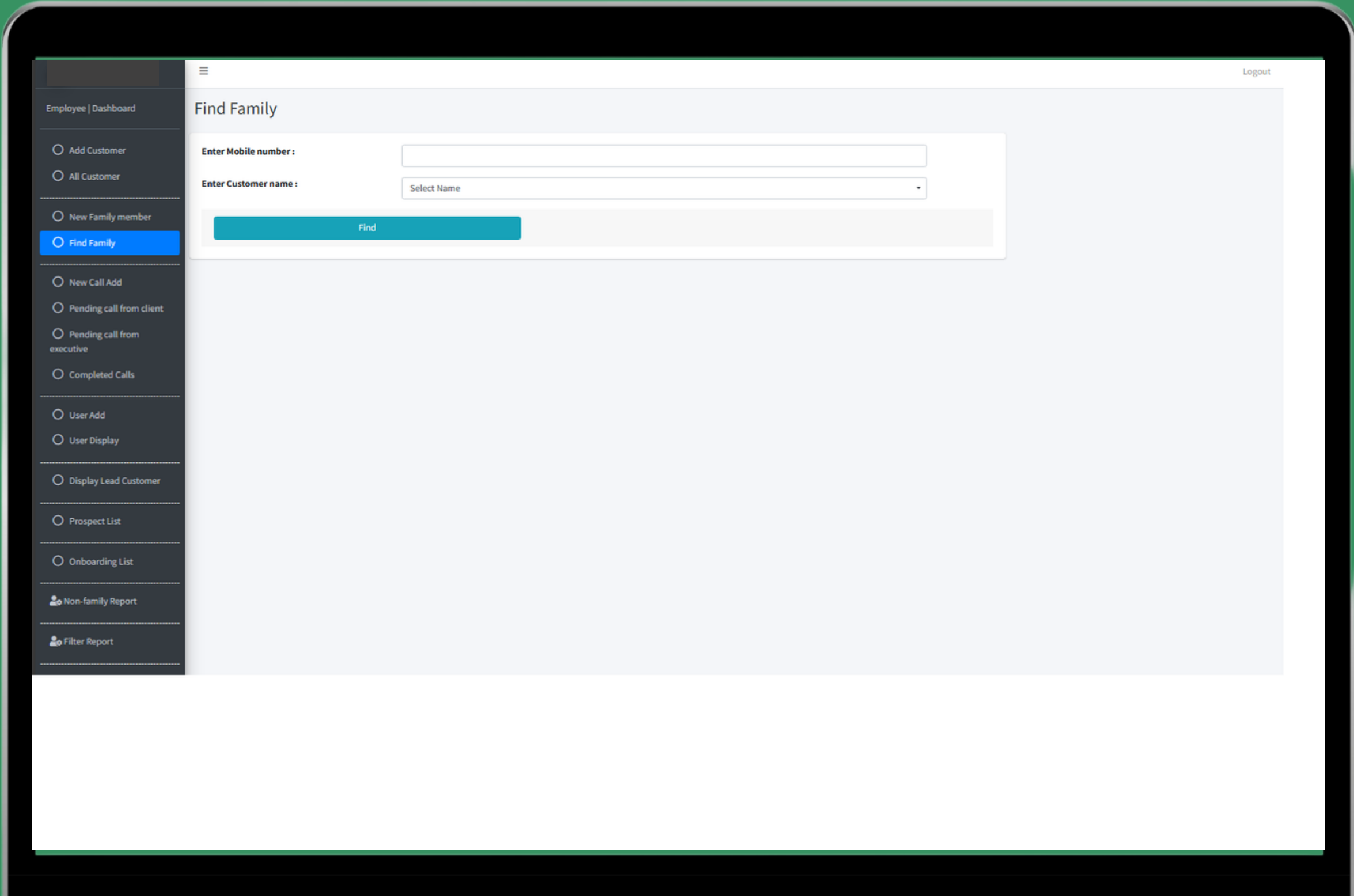
Customers

The screenshot displays a web application interface for adding user details. On the left is a dark sidebar menu with the following options: 'Employee | Dashboard', 'Add Customer', 'All Customer', 'New Family member' (highlighted in blue), 'Find Family', 'New Call Add', 'Pending call from client', 'Pending call from executive', 'Completed Calls', 'User Add', 'User Display', 'Display Lead Customer', 'Prospect List', 'Onboarding List', 'Non-family Report', and 'Filter Report'. The main content area is titled 'Add User details' and contains four dropdown menus: 'Select Customer' (with 'Select' as the current choice), 'Select family member' (with 'Select a member' as the current choice), 'Relationship with person' (with 'Select' as the current choice), and 'Family Priority' (with 'Select' as the current choice). Below these fields is a note: '(Note : Fields with * are mandatory.)'. At the bottom of the form is a green button labeled 'Add Member'. In the top right corner of the application, there are links for 'Logout', 'Home', and 'User'.

Masters

After Adding a New Family Member
We can search existing family members
by mobile number or customers name

Customers



— Add New Call Summary update date and time status of call update new follow up date and disposal status

Employee | Dashboard

Add Customer

All Customer

New Family member

Find Family

New Call Add

Pending call from client

Pending call from executive

Completed Calls

User Add

User Display

Display Lead Customer

Prospect List

Onboarding List

Non-family Report

Filter Report

Logout

Home / User

Add New Call Summery

Date & Time

2023-12-16 05:41:45 pm

Select Customer

Select Name

Call Summery

Disposal status

Select

Next Follow up date

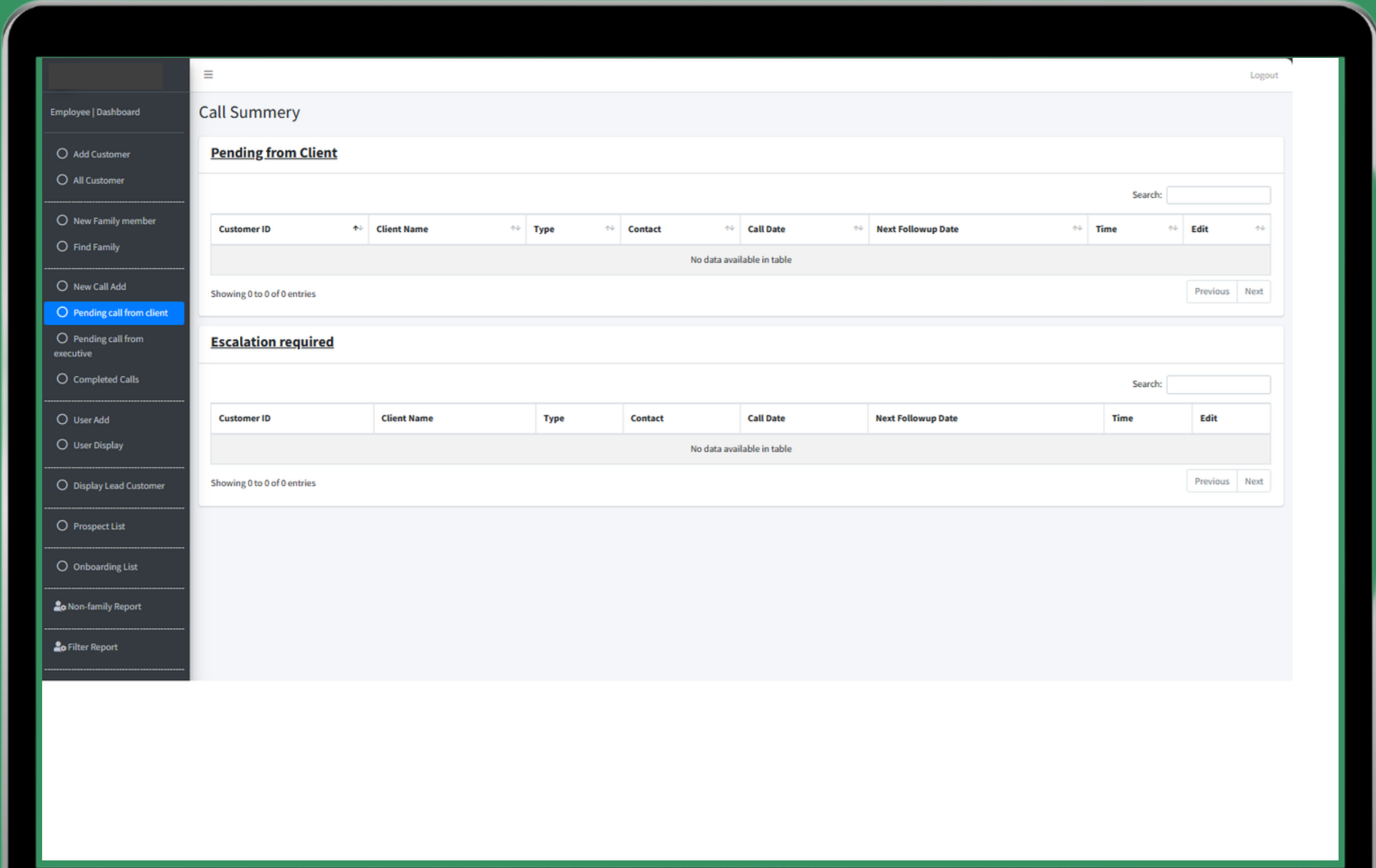
dd-mm-yyyy

Submit

Masters

Pending Call

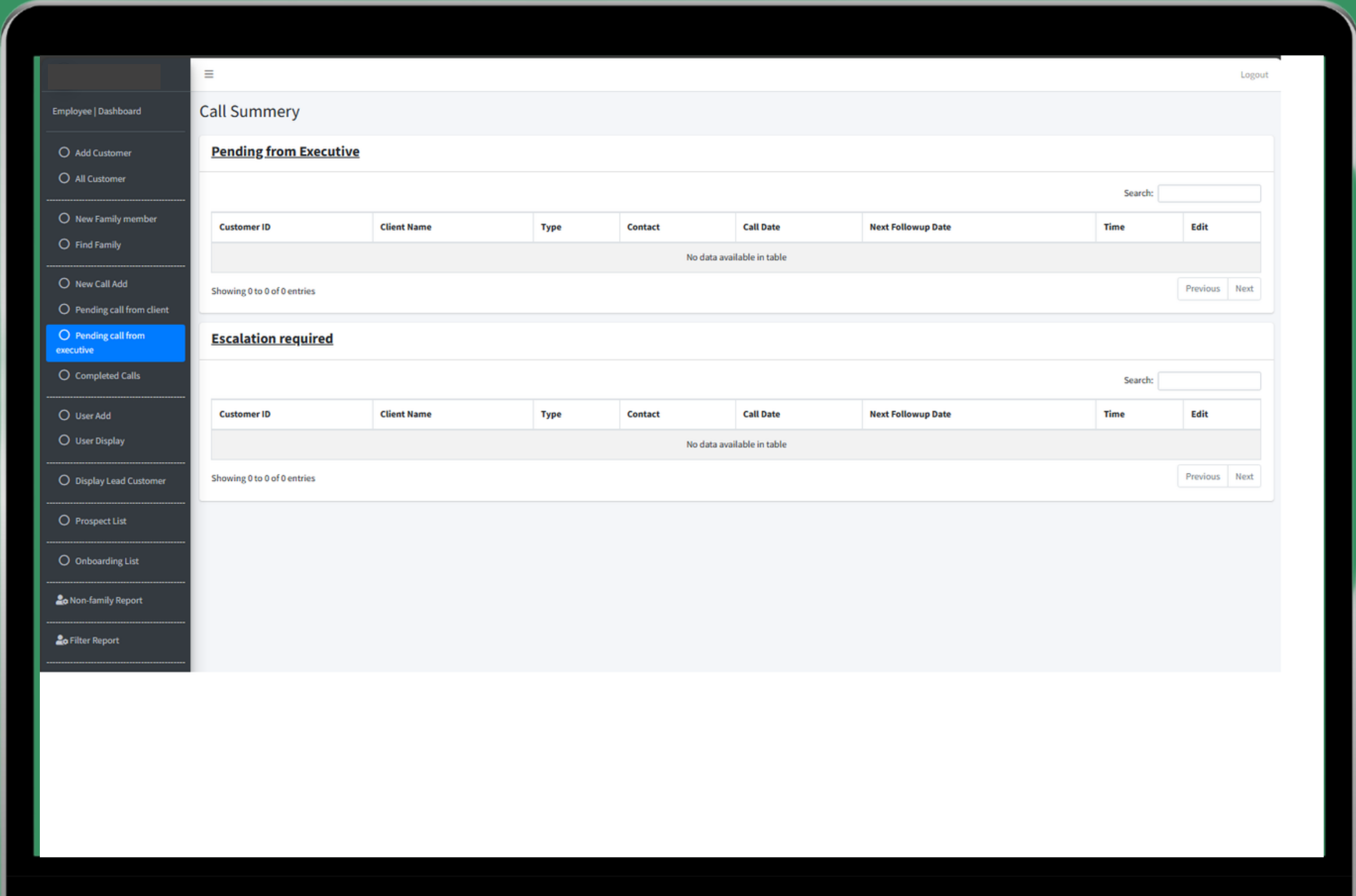
— Pending Call Summary update of individual client data such as time,client info,date,etc



Masters

Pending Call From Executive

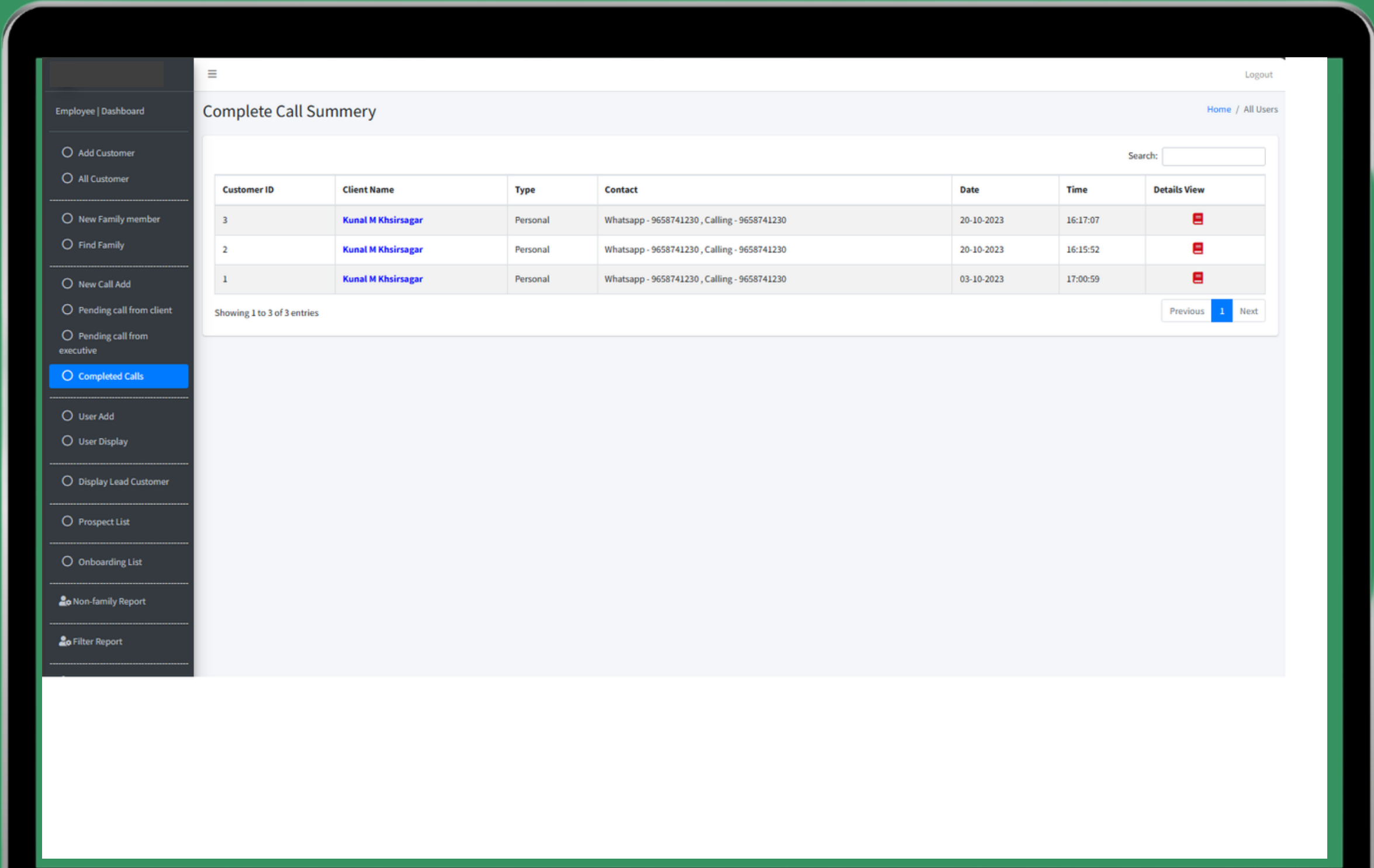
— Pending Call Summary update of individual Executive data such as time,client info,date,etc



Masters

Completed Call

Completed Call Summary update of individual data such as time,client info,date,etc



Masters

User

Adding a New Family Member/New Customer: Navigate to the "New Family Member" section in the application.

Click on the "Add Customer" button / Form to create a new customer profile. Input the required details, including customer name, contact information, and any additional details.

2. Managing Customer Information:

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Employee | Dashboard

Add Customer

All Customer

New Family member

Find Family

New Call Add

Pending call from client

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Completed Calls

User Add

User Display

Display Lead Customer

Prospect List

Onboarding List

Non-family Report

Filter Report

Logout

Home / User

First Name

* Enter Name

Last Name

* Enter Name

Email Id

* Email id

Mobile Number

Mobile Number

Department

Select Department

Select designation

Select

Select higher authorities

Select

Username

Enter username

Password

Enter password

Date of Birth

dd-mm-yyyy

Age

Enter age

Gender

Select

(Note : Fields with * are mandatory.)

Add New User

Masters

User

1. Accessing User List:

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3. Filtering and Sorting Options:

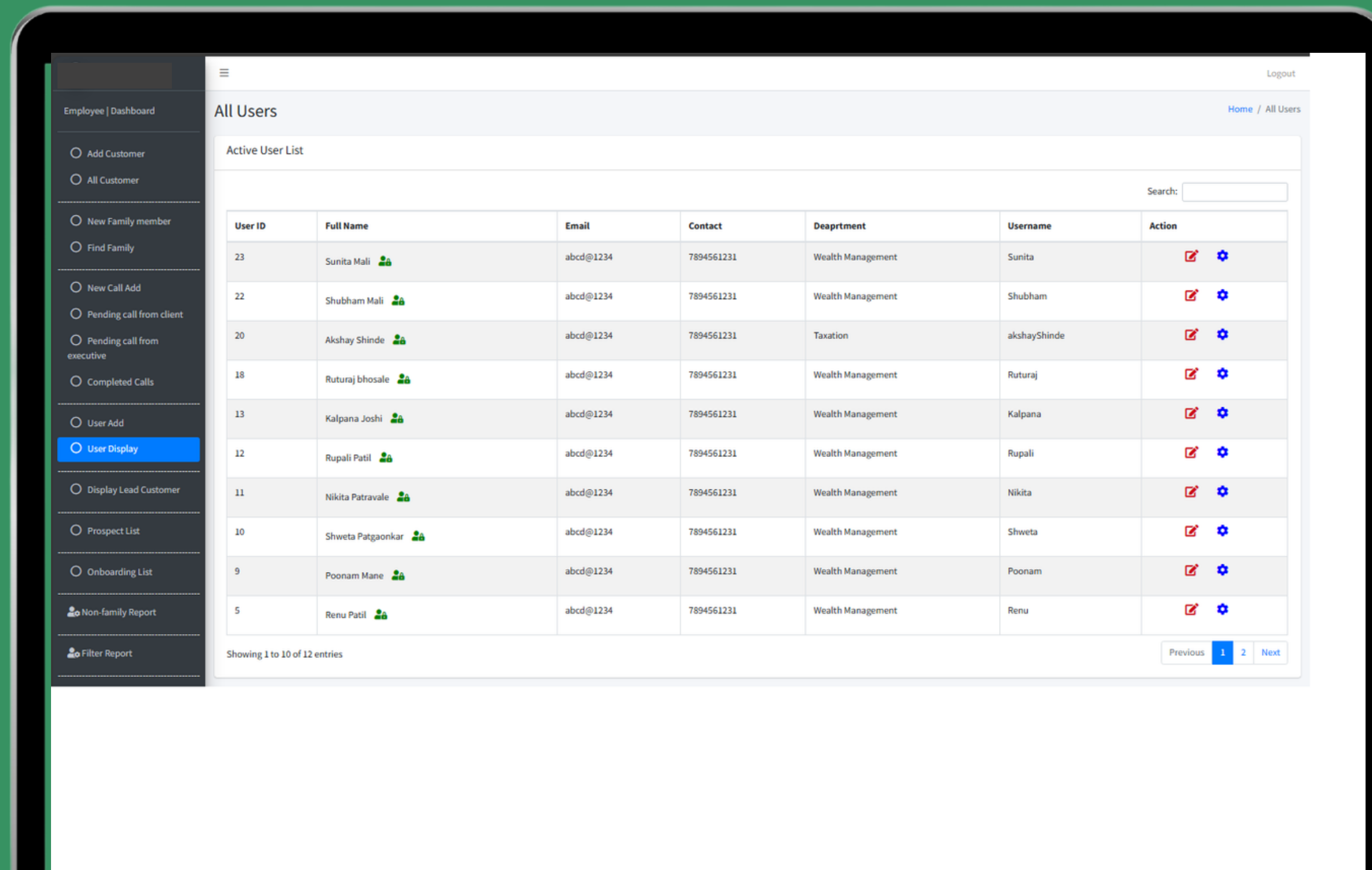
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- Experiment with sorting options to organize the list as per your preference.

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- Input the necessary changes and save the updated information.

5. Exporting, Updating and Deleting :

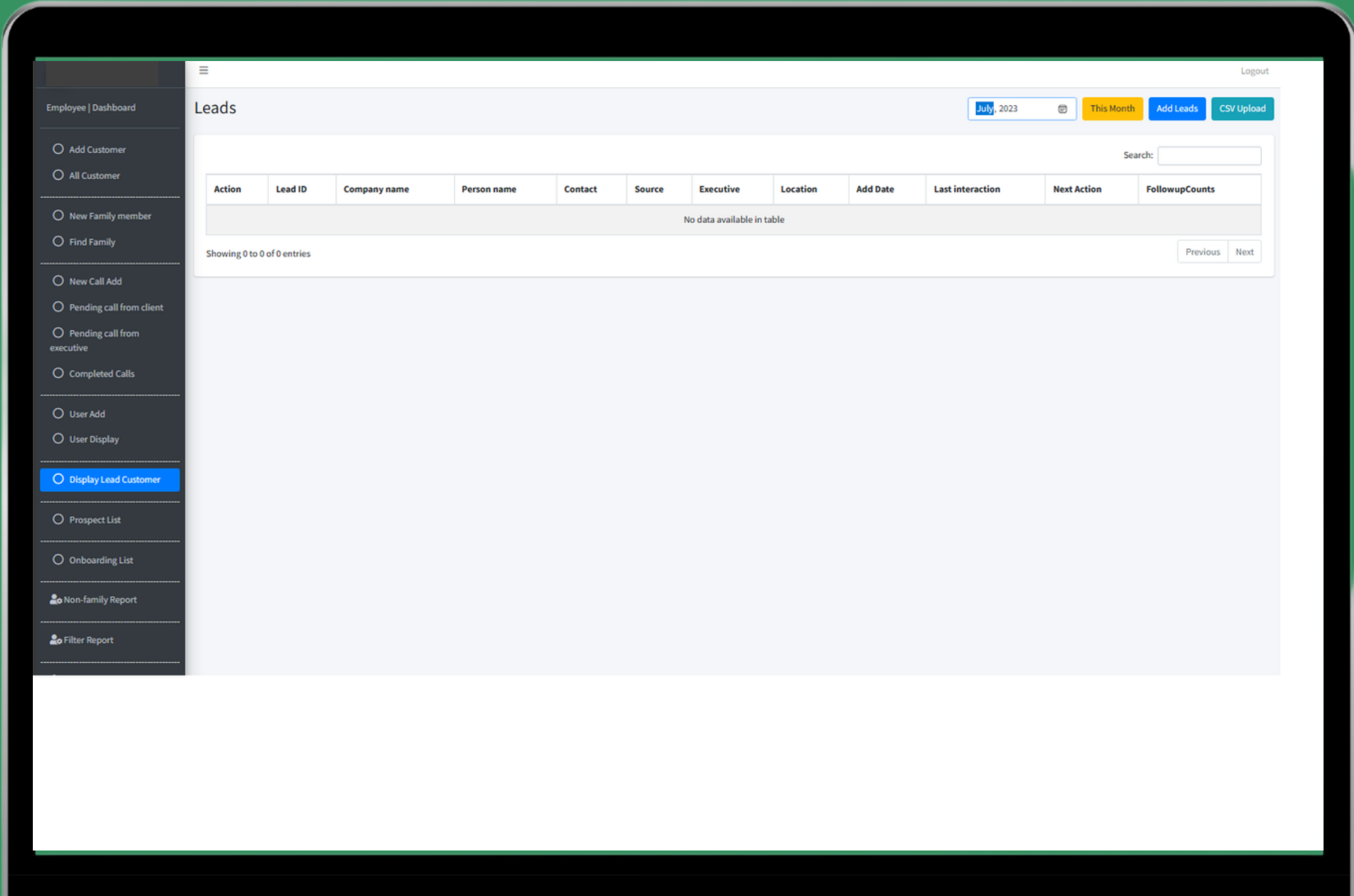
Exporting list in CSV, Excel, PDF, Print.



Masters

Lead

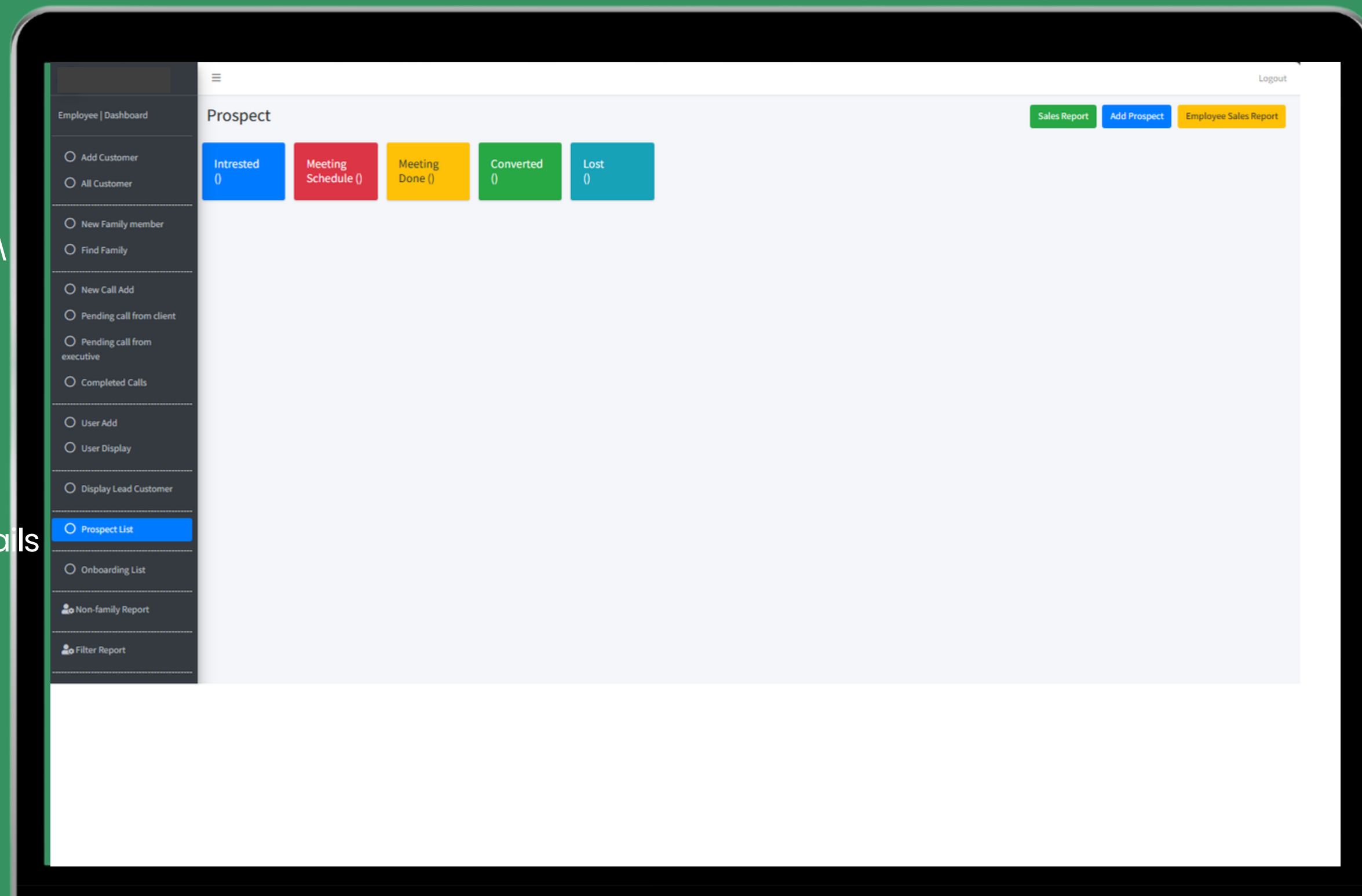
Viewing Lead Customer Report



Masters

Prospect

Here in Prospect there are Interested, meeting Schedule, meeting Done, Converted, Lost tabs. We can visualize if the customer is in Interested or in Meeting Schedule or Meeting Done or Converted or Lost. If one of The customer is about to schedule meeting or want to move to next or into previous stage we can do it through arrow assigned to that particular customer \ Now we want to add details to that particular customer we can click on that particular customer and new \ window will be pop up and we can fill details of Interaction or Next Interaction Field and we can add next Interaction Date and we can change the status as well and we can send details to Same goes with Meeting Schedule, Meeting Done process If you want to filter out with that particular employee details of customer we can do it using Filter option given on the top If you want to add a new Prospecct we can do it through clicking on Add prospect or if want to view Employee sales report filtering using date ways we can do it by clicking on Employee Sales Report button, also we can view details of Sales Report by clicking on Sales Report

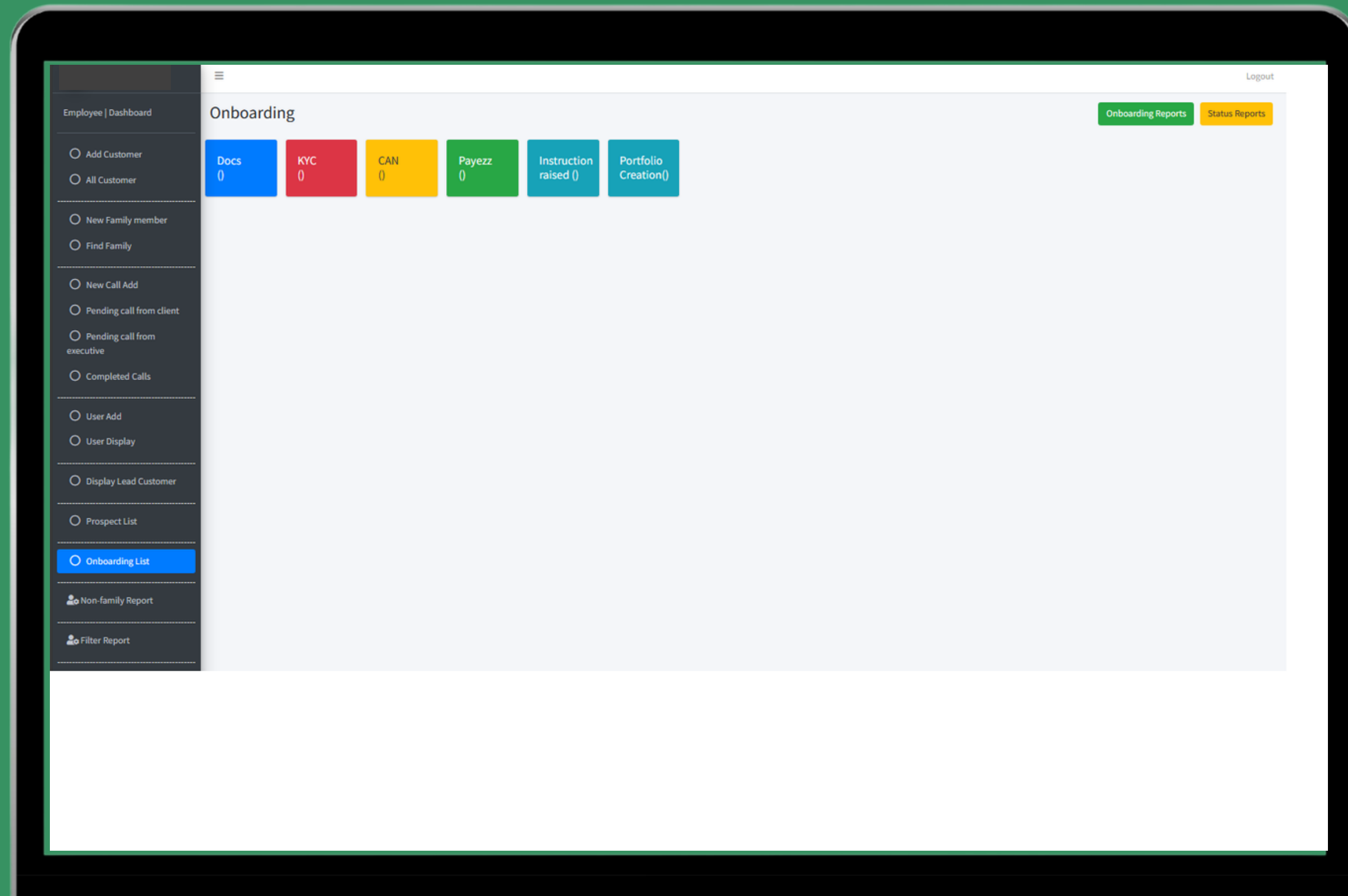


Masters

Onboarding

In Onboarding, after the customer is converted there is a process to join Documentation, KYC, CAN, Payezz, Instruction raised, Portfolio Creation.

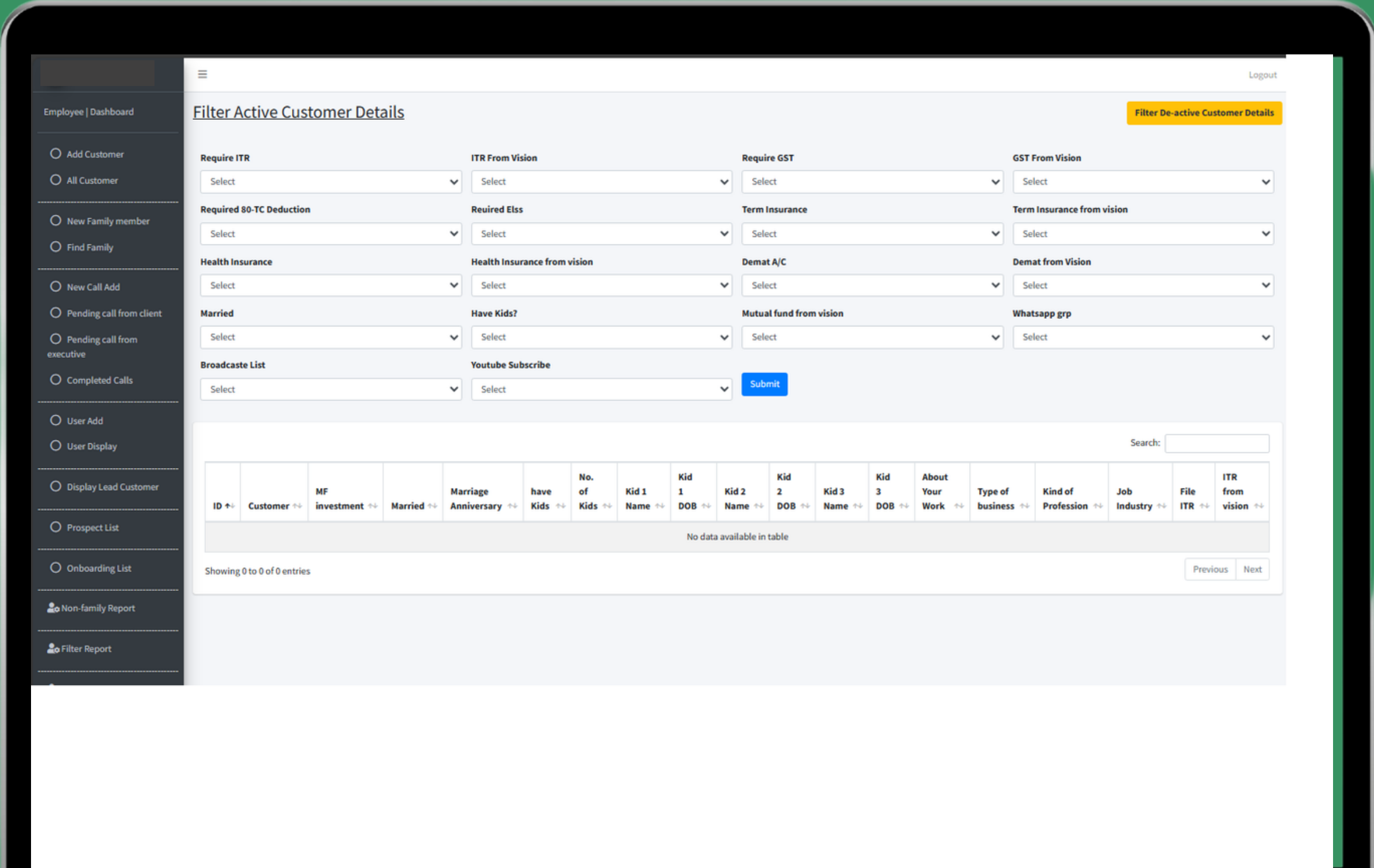
As the process starts with Documentation then it goes to KYC then it goes to CAN then it goes to Payezz, if there is instruction raised then the last process is Portfolio Creation.



Masters

Filter Report

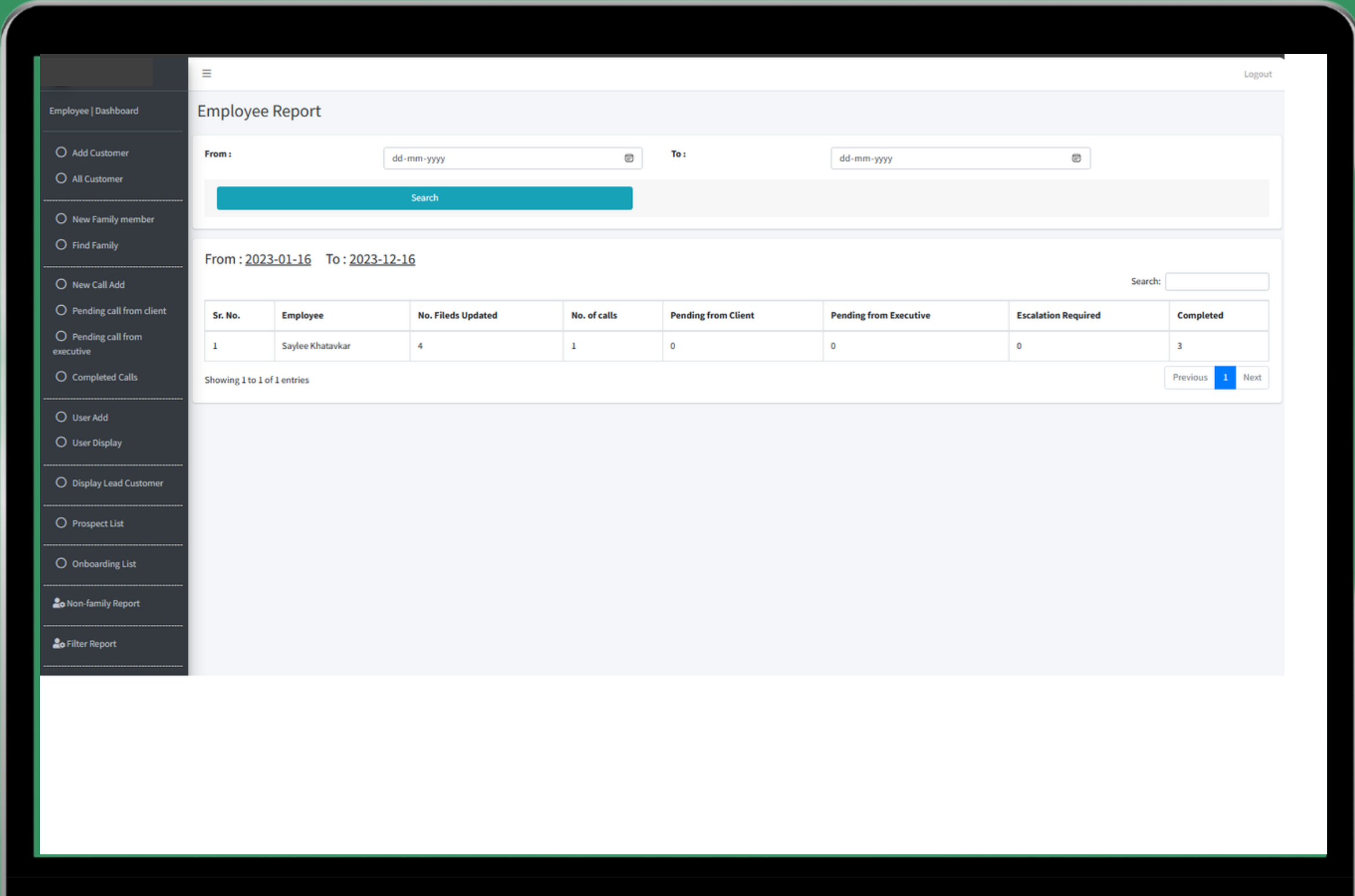
We can Filter active customers details using several activities shown on image and can Export, Update and Delete records, Export list in CSV, Excel, PDF, Print.



Masters

Employee Report

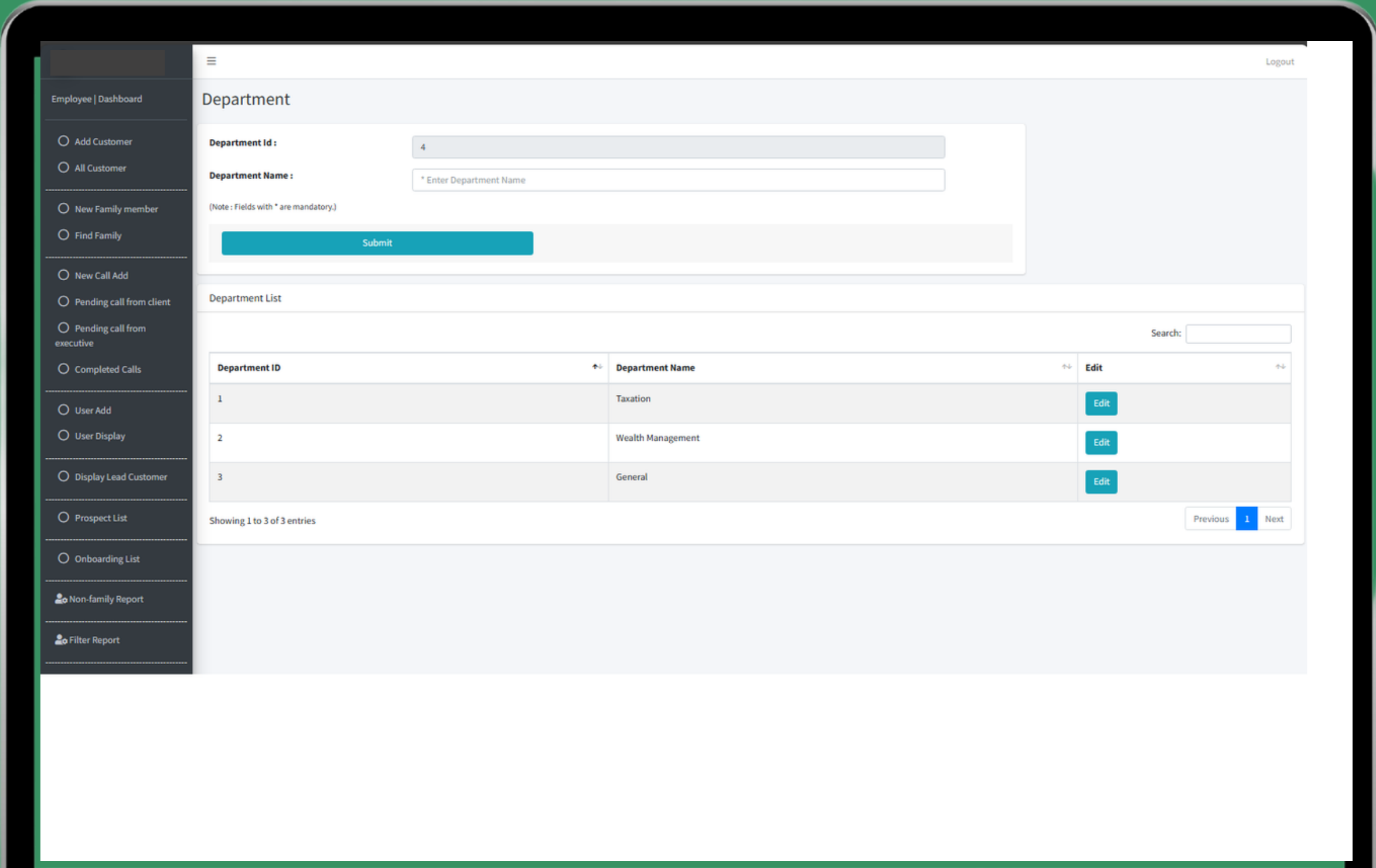
- Viewing Employee Report from Certain time period by using date form
- Exporting, Updating and Deleting :
Exporting list in CSV, Excel, PDF, Print.



Masters

Department

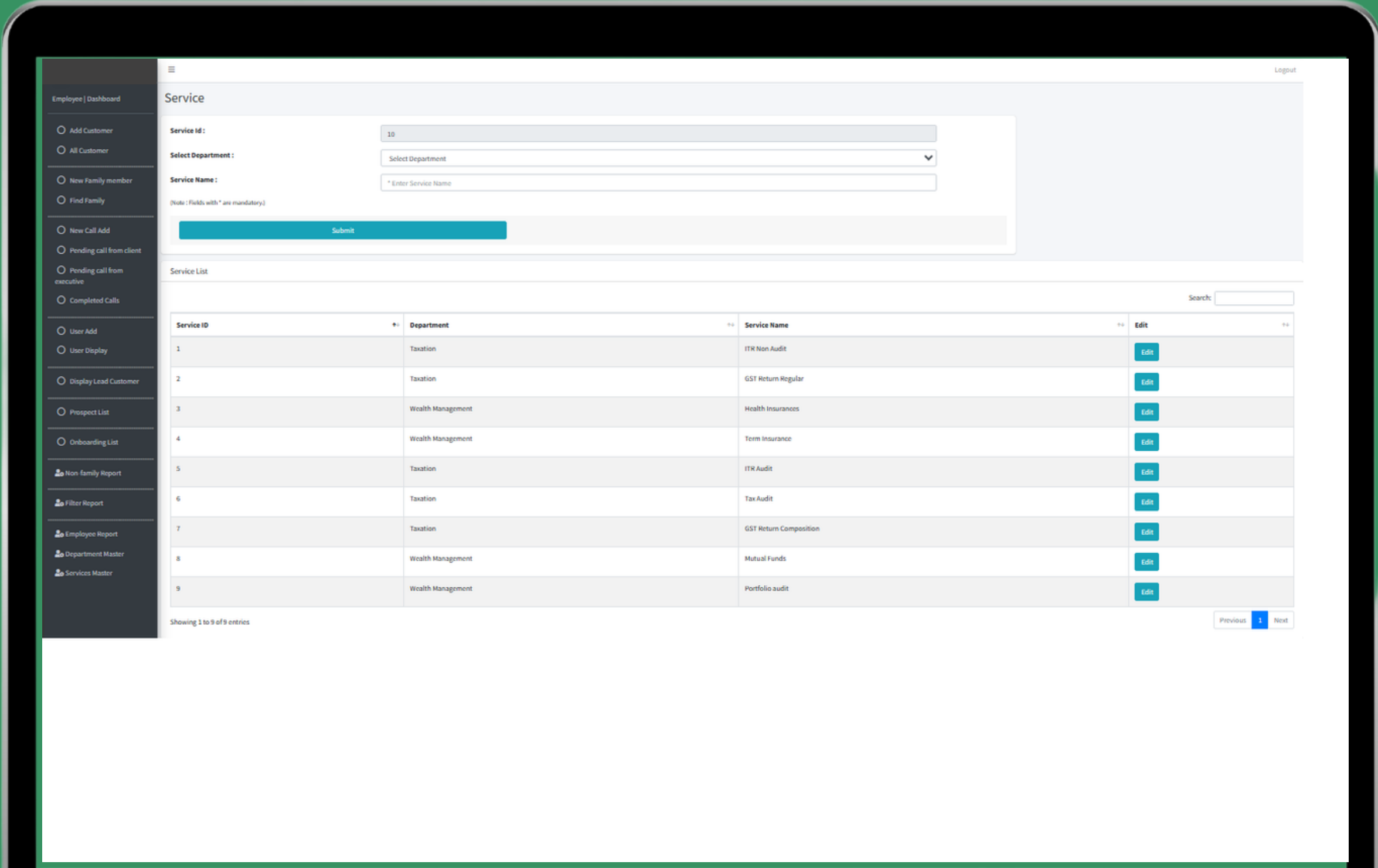
- Viewing Department Id by using form and updating the data.
- Exporting, Updating and Deleting :
Exporting list in CSV, Excel, PDF, Print.



Masters

Service

- Viewing Services Report by using form and updating the data.
- Exporting, Updating and Deleting :
Exporting list in CSV, Excel, PDF, Print.



FEATURED

LEAFTECH.IN Guarantee

- ✿ Bug free delivery
- ✿ Priority on site support
- ✿ Friendly and supportive staff
- ✿ Focusing more on satisfactory service than commercial benefit
- ✿ Continued relations for decades
- ✿ Ethical and transparent transactions
- ✿ One point communication
- ✿ 24/7 support for maintenance

Get Free Consultation



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TESTIMONIAL

Future of Software Solutions with LeafTech



Billing and Stock Management Application

With our billing application, you can effortlessly create, customize, and send professional invoices to your clients, saving you time.

Inventory

Accounting

Purchase

Recovery

Reports

Billing



Customer Relationship Management (C.R.M.)

empowers your organization to excel in building, maintaining, and nurturing those all-important customer connections.

Leads

Task Manag.

Meeting

Notifications

Reports

Production



Sales and Distribution E.R.P.

In the dynamic world of commerce, managing sales and distribution operations efficiently is crucial for your business's success.

Godowan

Sales Login

Accounts

Recovery

Reports

Billing

TESTIMONIAL

Future of Software Solutions with LeafTech



Task Management

it's a tool that helps you regain control of your tasks and be more productive. Here's why LeafTech is the ideal choice for your task

Task Allocat.

Departments

Performance

Quotations

Reports

Leads



Manufacturing E.R.P.

we offer a comprehensive and tailored Manufacturing Enterprise Resource Planning (ERP) solution designed specifically for Factories.

Production

Customers

Customers

Reminders

Reports

Performance



Appointment Management

we understand the significance of seamless appointment management in today's fast-paced world.

Reception

Medicine

Accounts

Que Manag.

Reports

Billing

OUR SERVICES

Future of Software Solutions with LeafTech



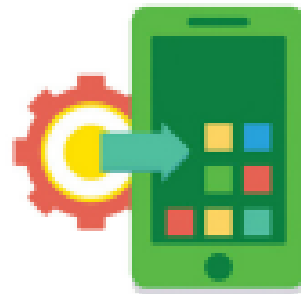
WEBSITE DEVELOPMENT

1. Static
2. Dynamic
3. E-Commerce
4. Online ERP
5. CRM
6. CMS



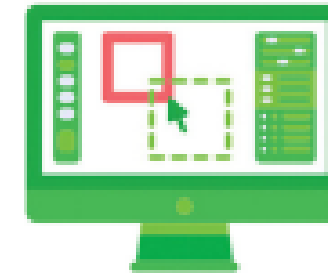
SOFTWARE DEVELOPMENT

1. Network
2. Stand Alone
3. ERP
4. Custmised
5. Electronic
Device Interface



MOBILE APPLICATIONS DEVELOPMENT

1. Android
2. IOS
3. Windows
4. Hybrid
5. Web U
Interface



BRANDING SOLUTIONS

1. Logo
2. Presnetation
3. Stationary
4. Clothing
5. Email
Designs



VIDEO MAKING & PHOTOGRAPHY

1. Short Films
2. Presentation
3. Candid Photo.
4. Product Photo.
5. Factory Photo.
6. WildLife Photo.



DIGITAL MARKETING

1. Social Media
2. Email
3. SMS
4. SEO
5. Content
Designs

C O N T A C T

Get in Touch

We're just a message away! Reach out to us via phone, email, or the contact form below. Our dedicated team of experts is ready to assist you with your inquiries and provide tailored solutions that meet your specific needs.



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