LEAFTECH.IN

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

13 Th	27 +	5K +
Year's of Experiance	Experianced Team	Website's Development

5223 CUSTOMUSER 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

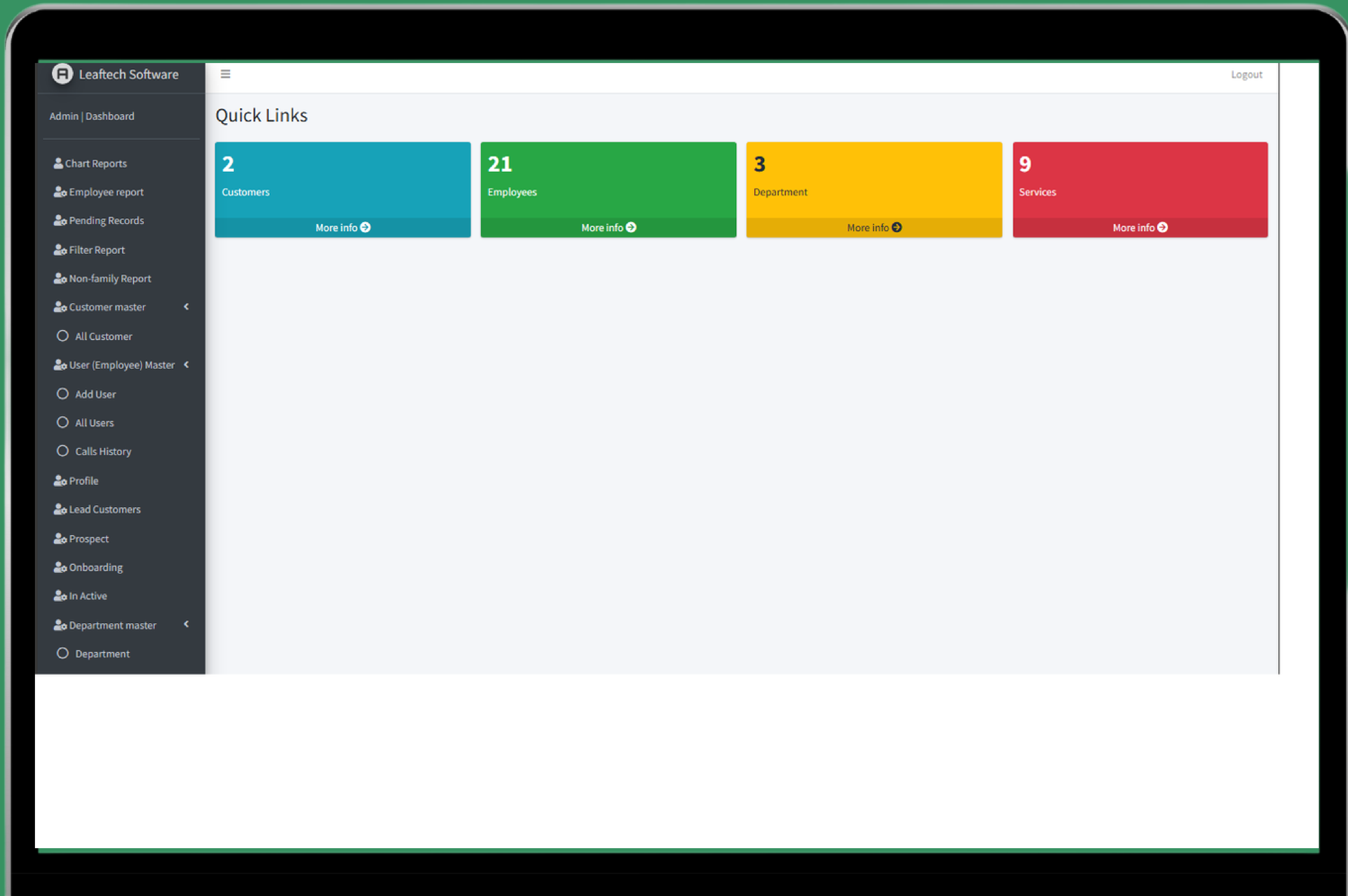
The features of the actual software may be different in understanding documentation is just a guideline of our proposed projects though we recommend you to test all features before purchase

Dashboard Overview

Super Admin Login

The Dashboard provides a snapshot of

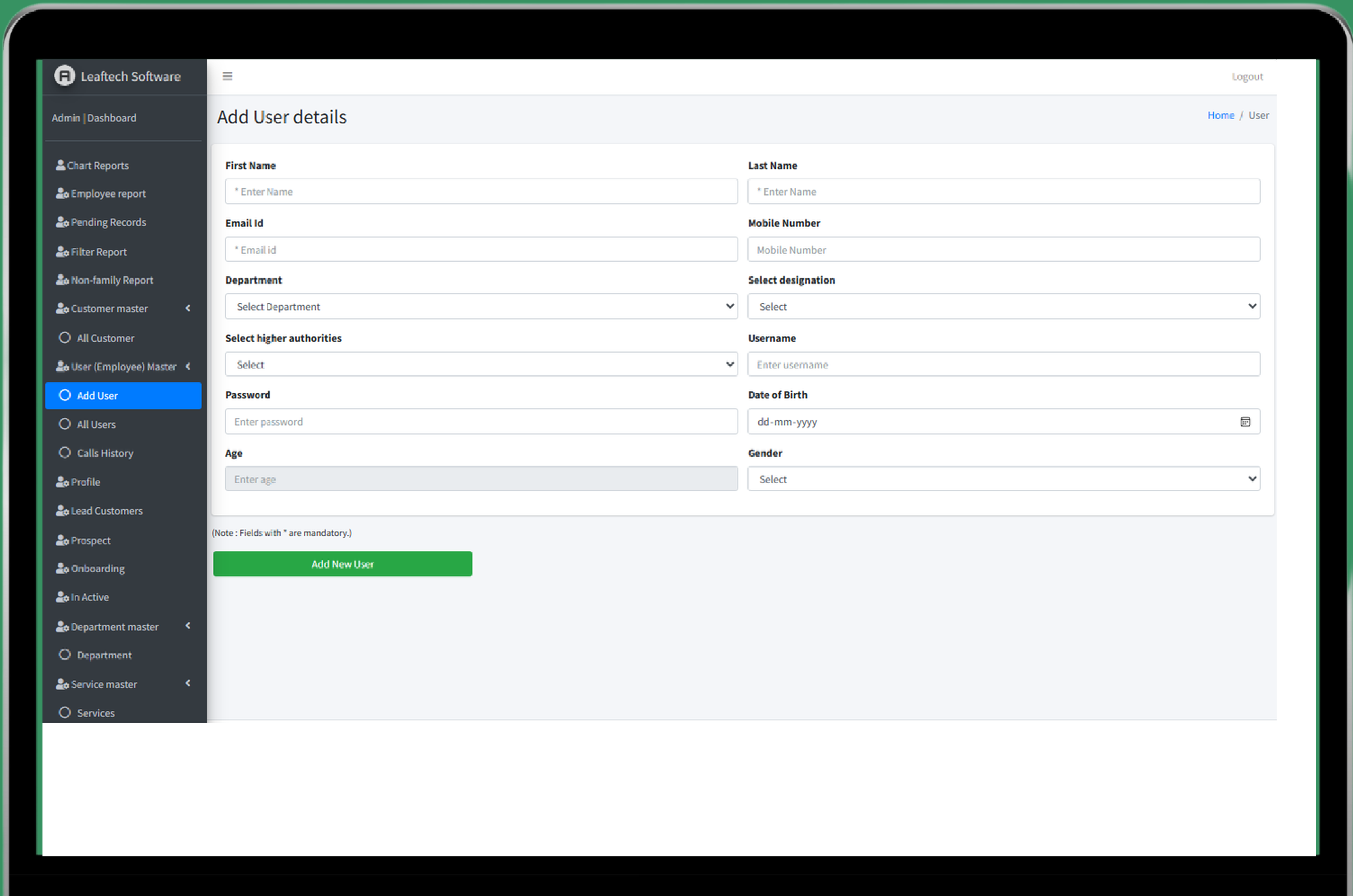
- Customers
- Employees
- Department
- Services



Masters

Users

- 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.



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Users

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   - Navigate to the "Customers" section in the application.
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2. Viewing User Details from the List:
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4. Utilize filtering User Information:
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5. Exporting, Updating and Deleting :
   - Exporting list in CSV, Excel, PDF, Print.

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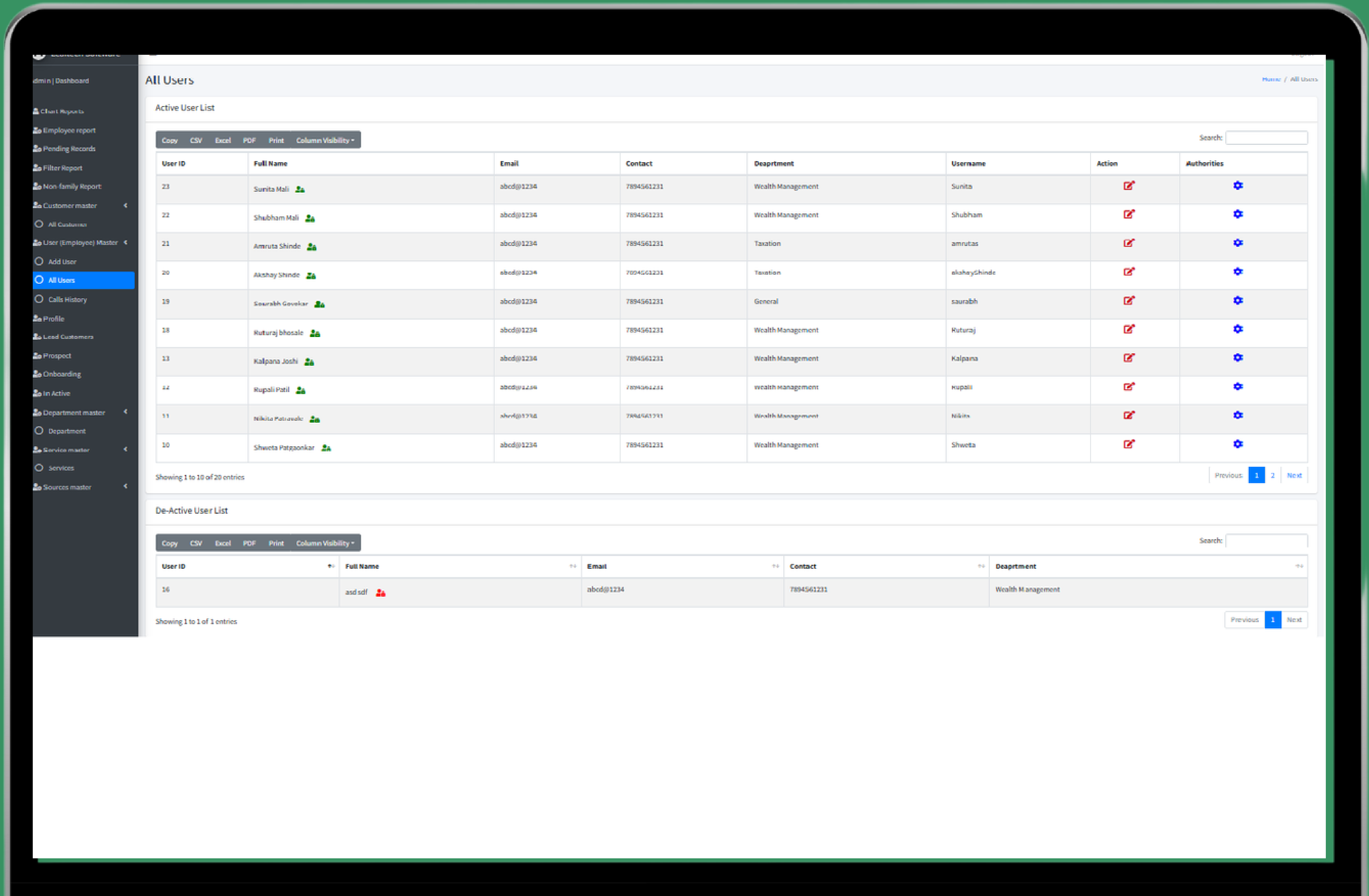
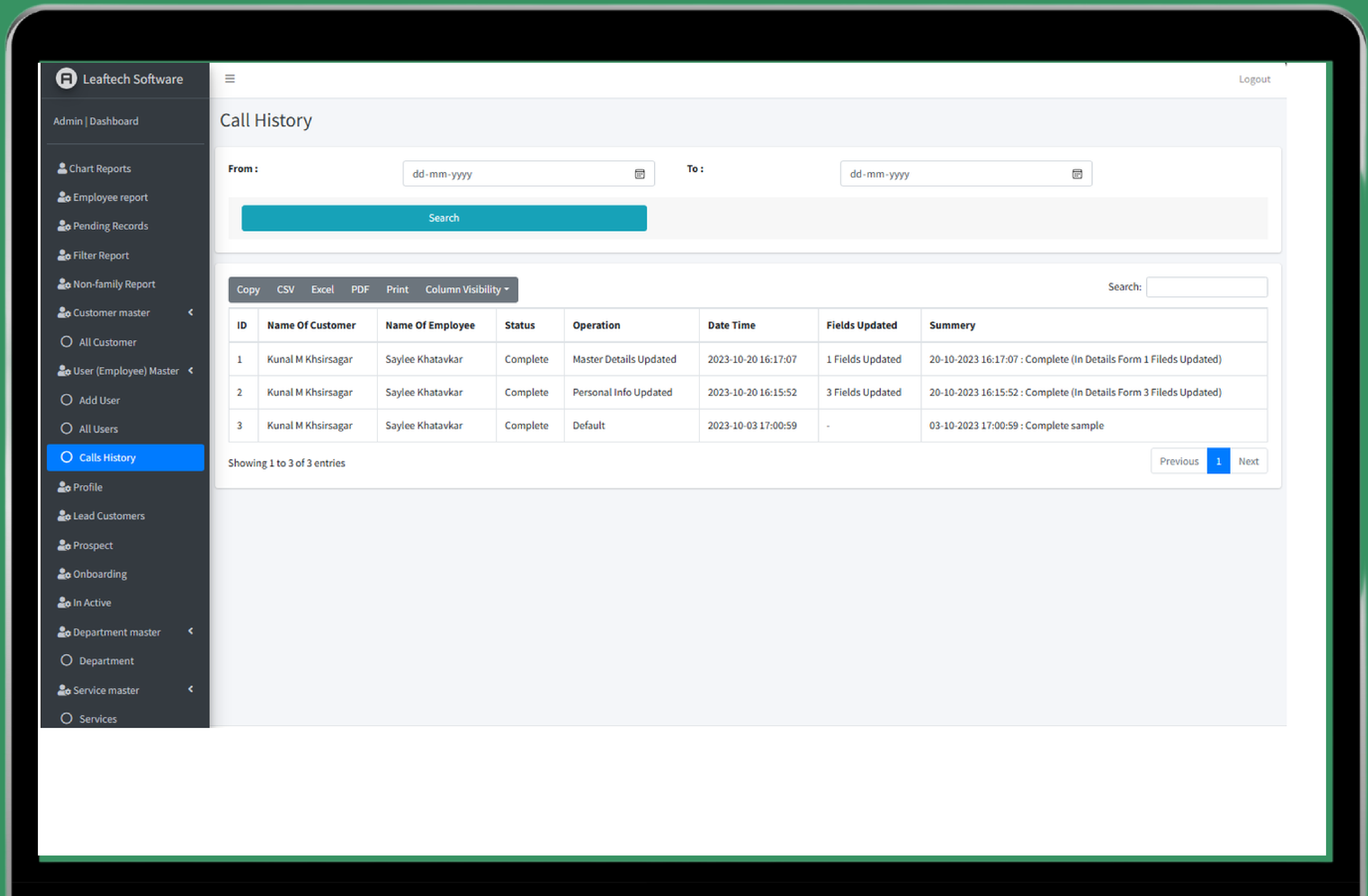


Masters

Users

- Viewing Call History of User from Certain time period by using date form

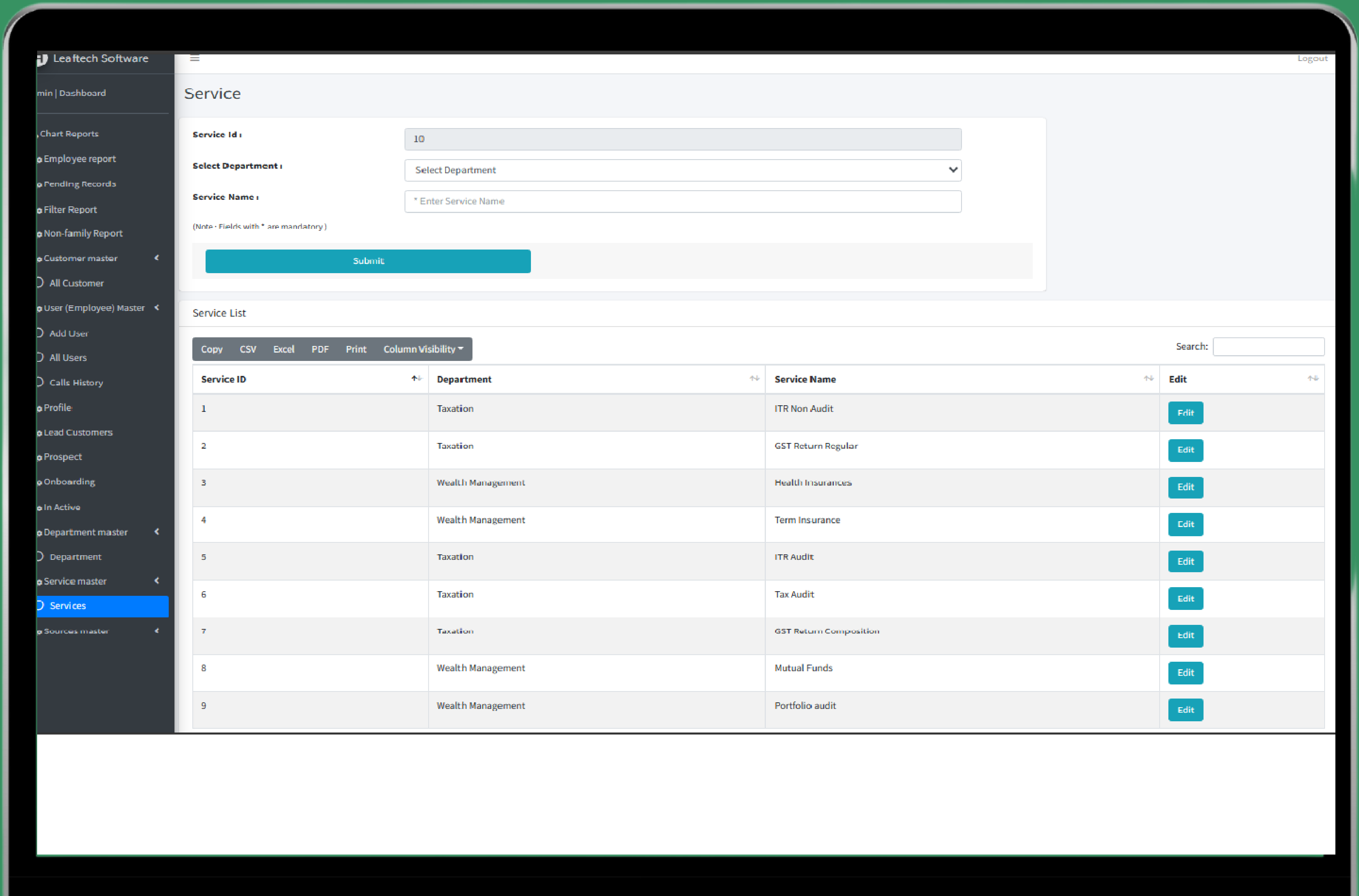
- Exporting, Updating and Deleting : Exporting list in CSV, Excel, PDF, Print.



Masters

Service

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

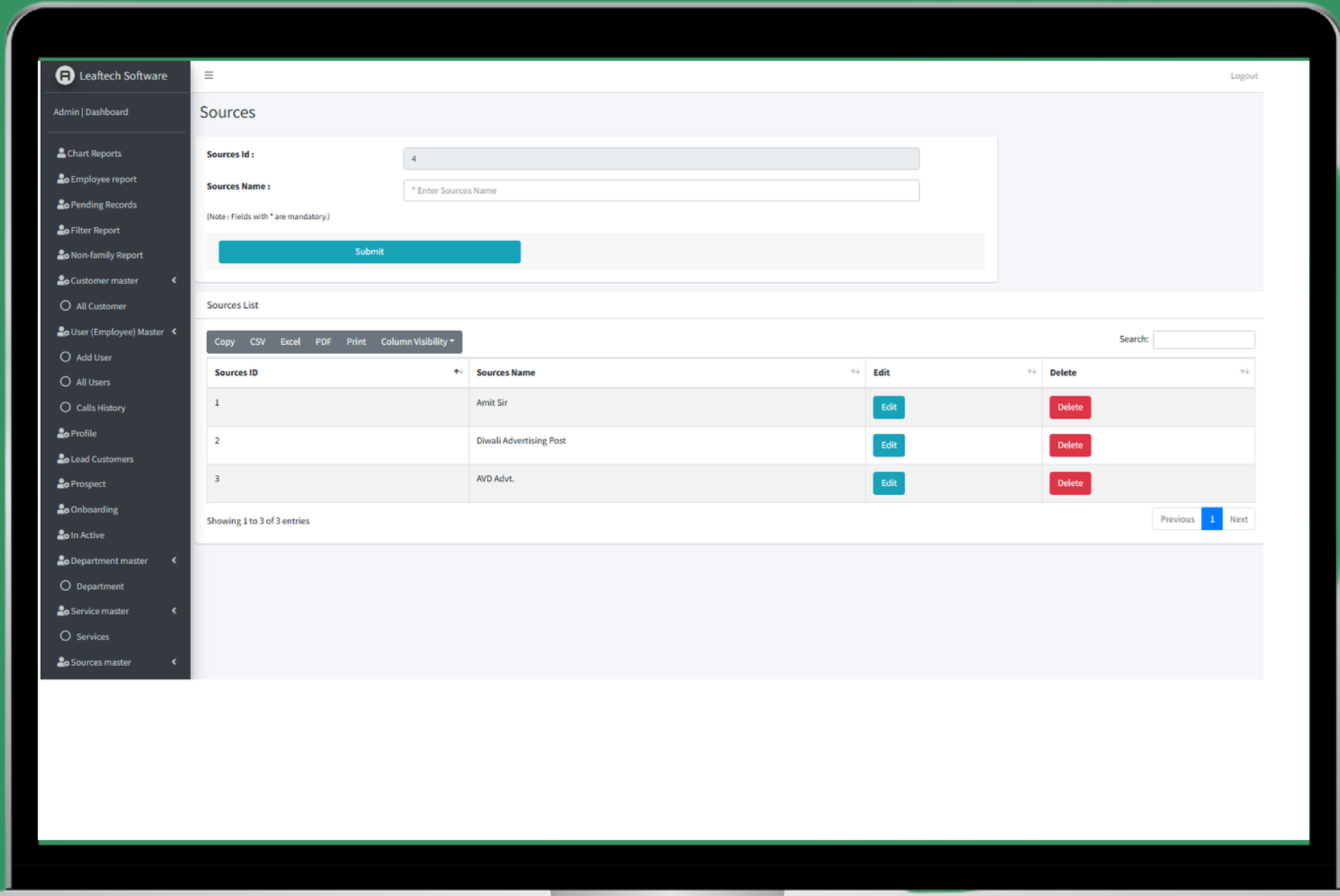


Masters

Source

- Viewing Sources Report by using form and updating the data.

- Exporting, Updating and Deleting : Exporting list in CSV, Excel, PDF, Print.

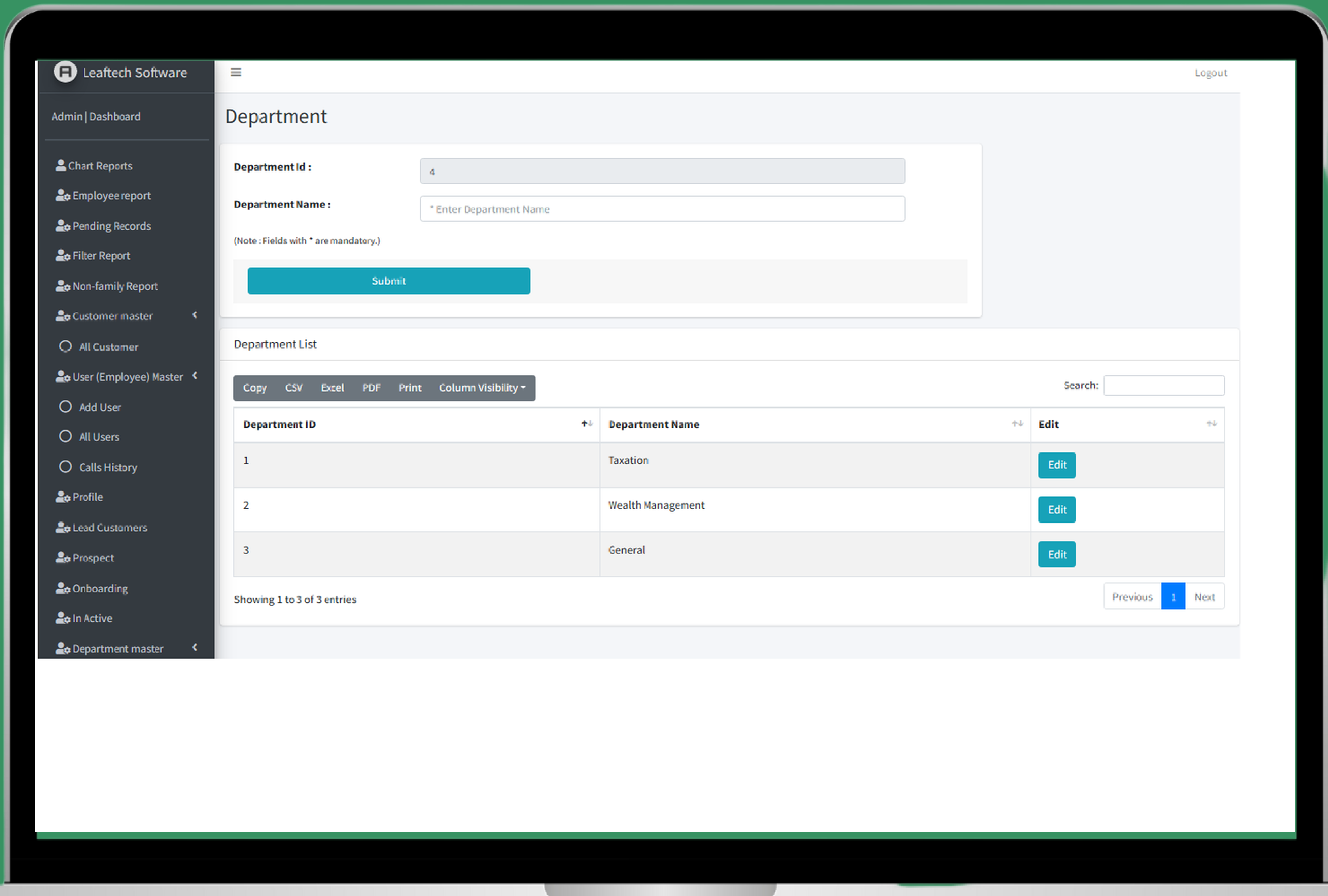


Masters

Department

- Viewing Department Id by using form and updating the data.

- Exporting, Updating and Deleting : Exporting list in CSV, Excel, PDF, Print.



Masters

Customers

- 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.

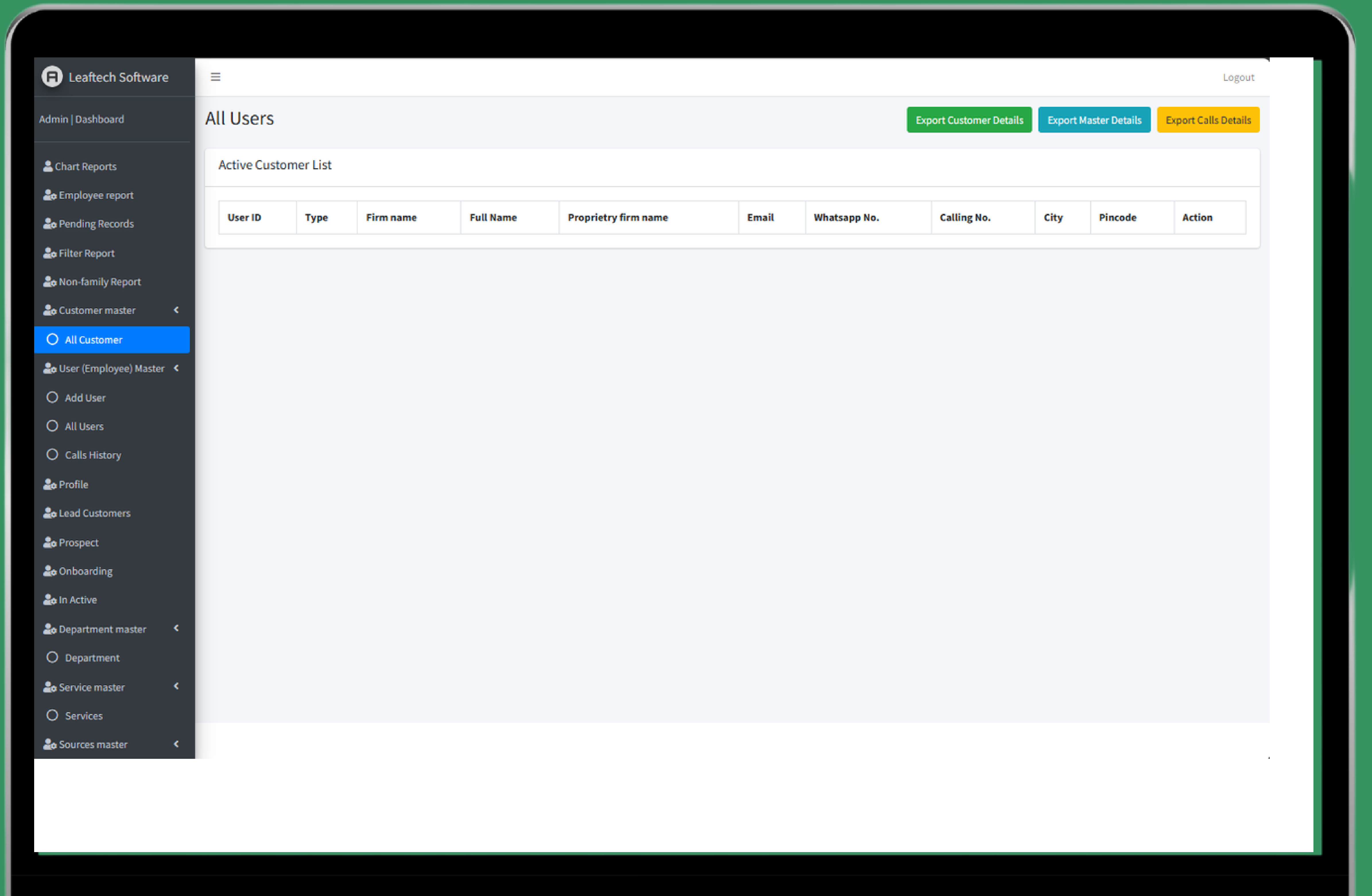
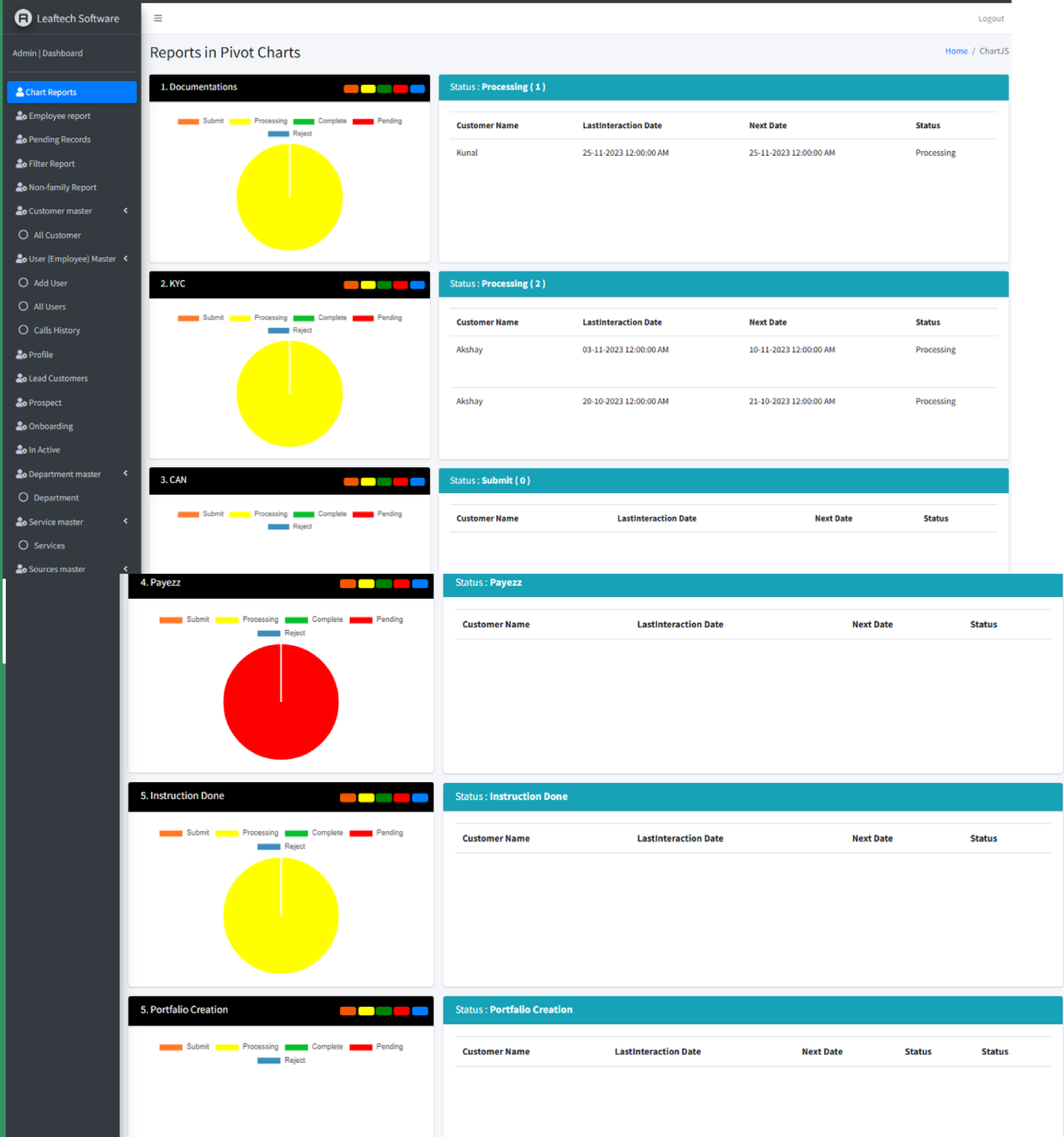


Chart Report

- 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

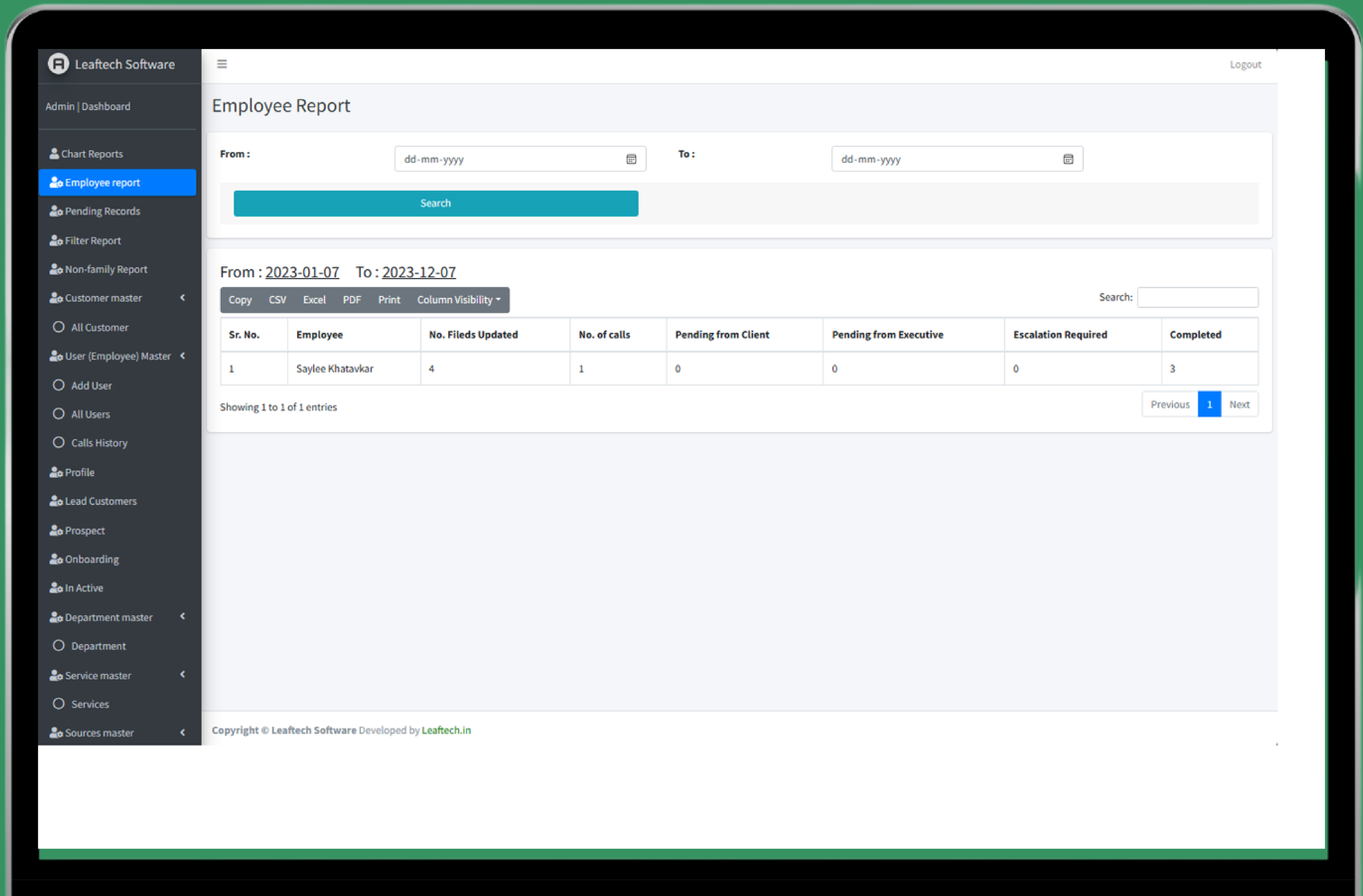


Masters

Employee Report

— Viewing Employee Report from Certain time period by using date form

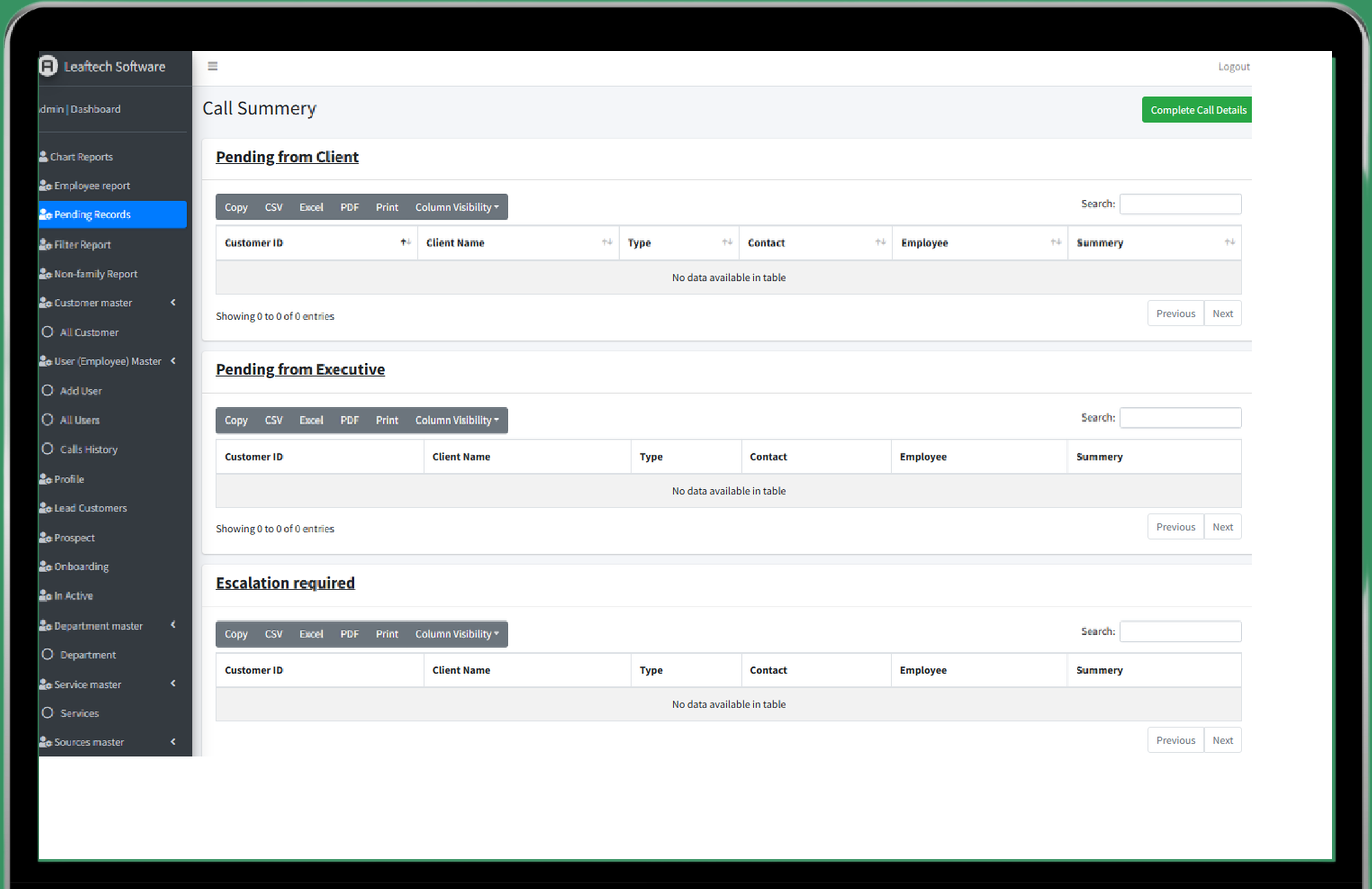
— Exporting, Updating and Deleting : Exporting list in CSV, Excel, PDF, Print.



Masters

Pending Records

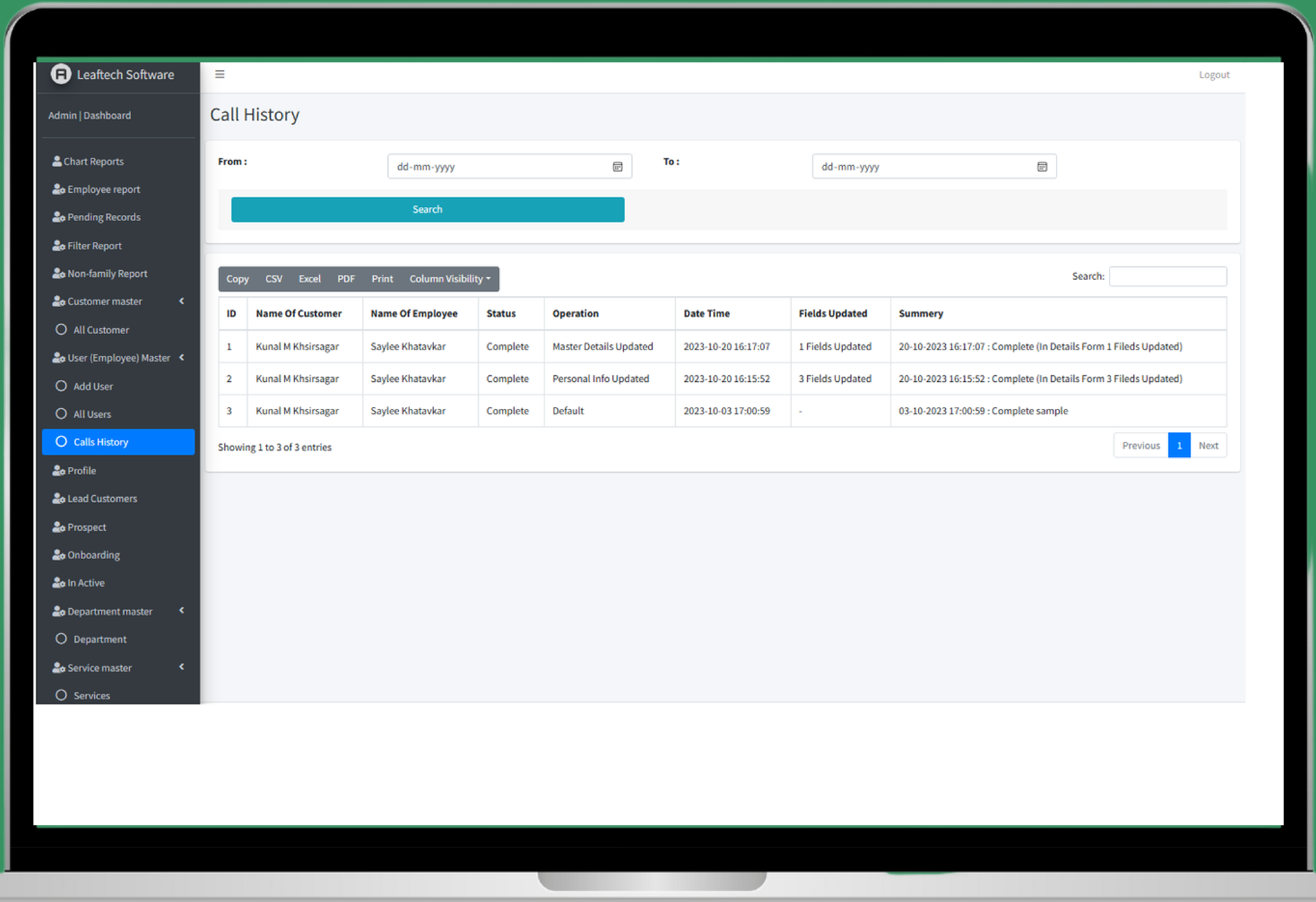
- We can View, Update and complete pending records of clients can Exporte, Update and Delete records, Exporte list in CSV, Excel, PDF, Print.
- We can View, Update and complete pending records of Executive can Exporte, Update and Delete records, Exporte list in CSV, Excel, PDF, Print.
- We can View,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



Masters

Call History

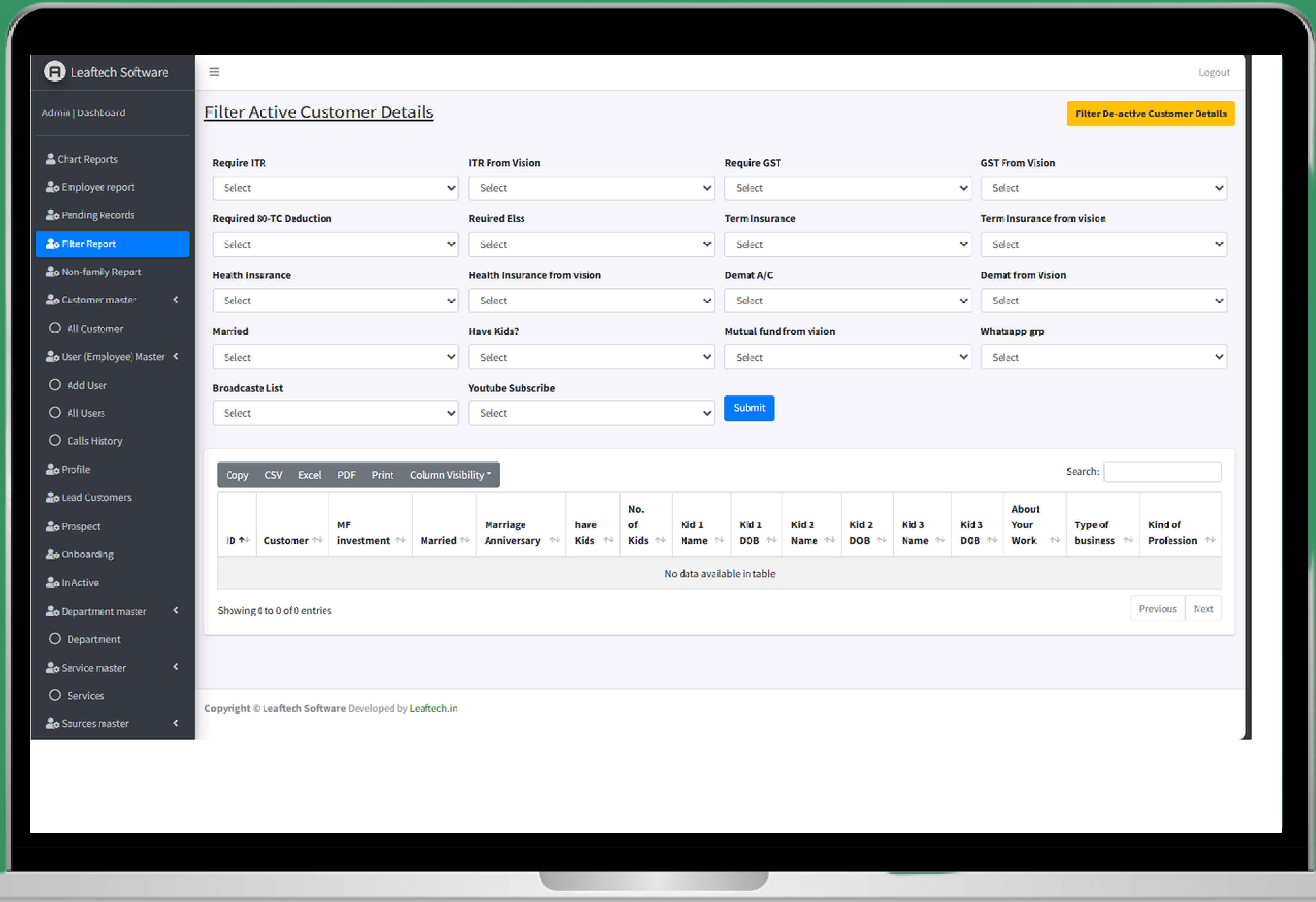
- We can check users particular call record from specific date records/work and can Exporte, Update and Delete records, Exporte list in CSV, Excel, PDF, Print.



Masters

Filter Reports

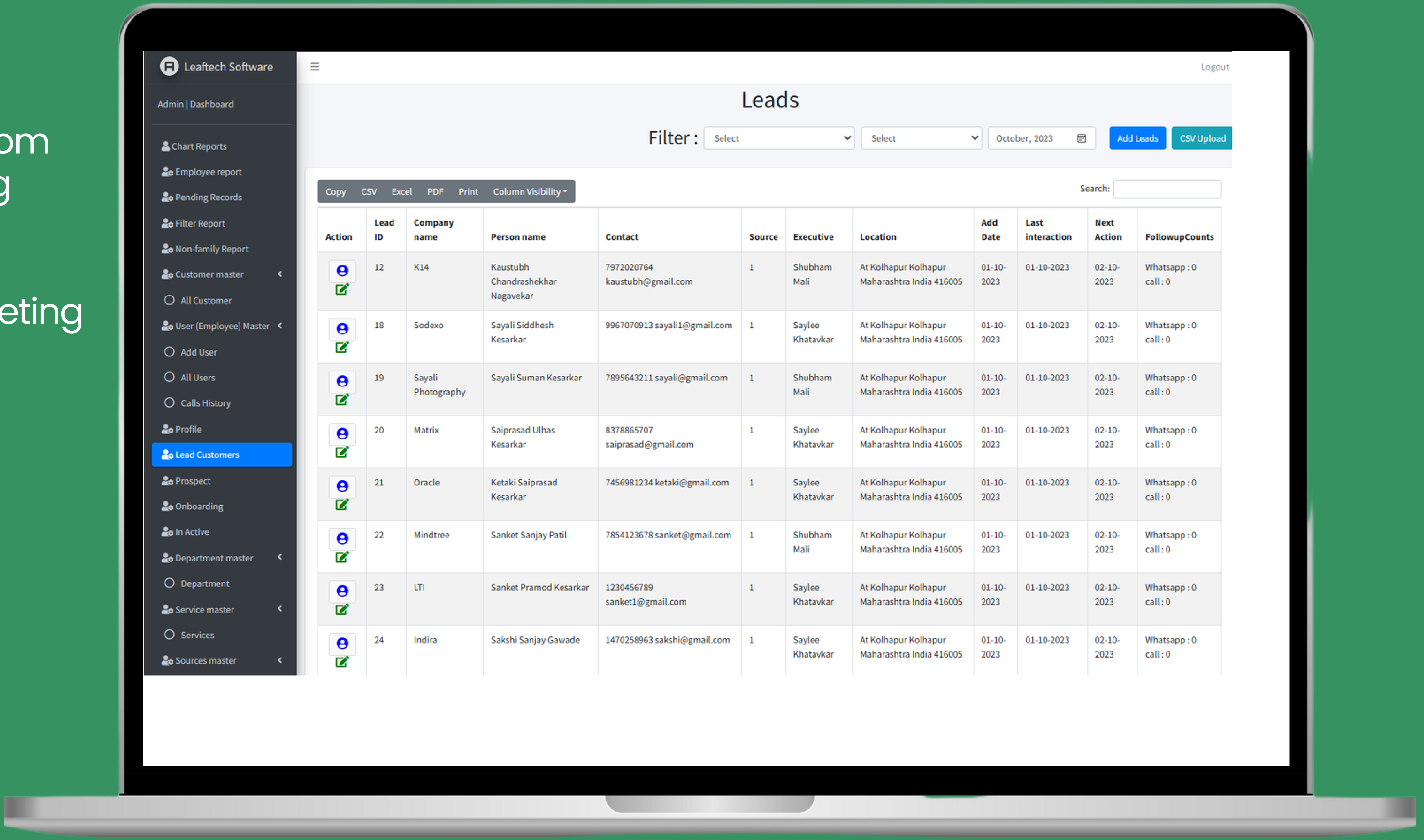
We can Filter active customers details using several activites shown on image and can Exporte, Update and Delete records, Exporte list in CSV, Excel, PDF, Print.



Masters

Lead Customer

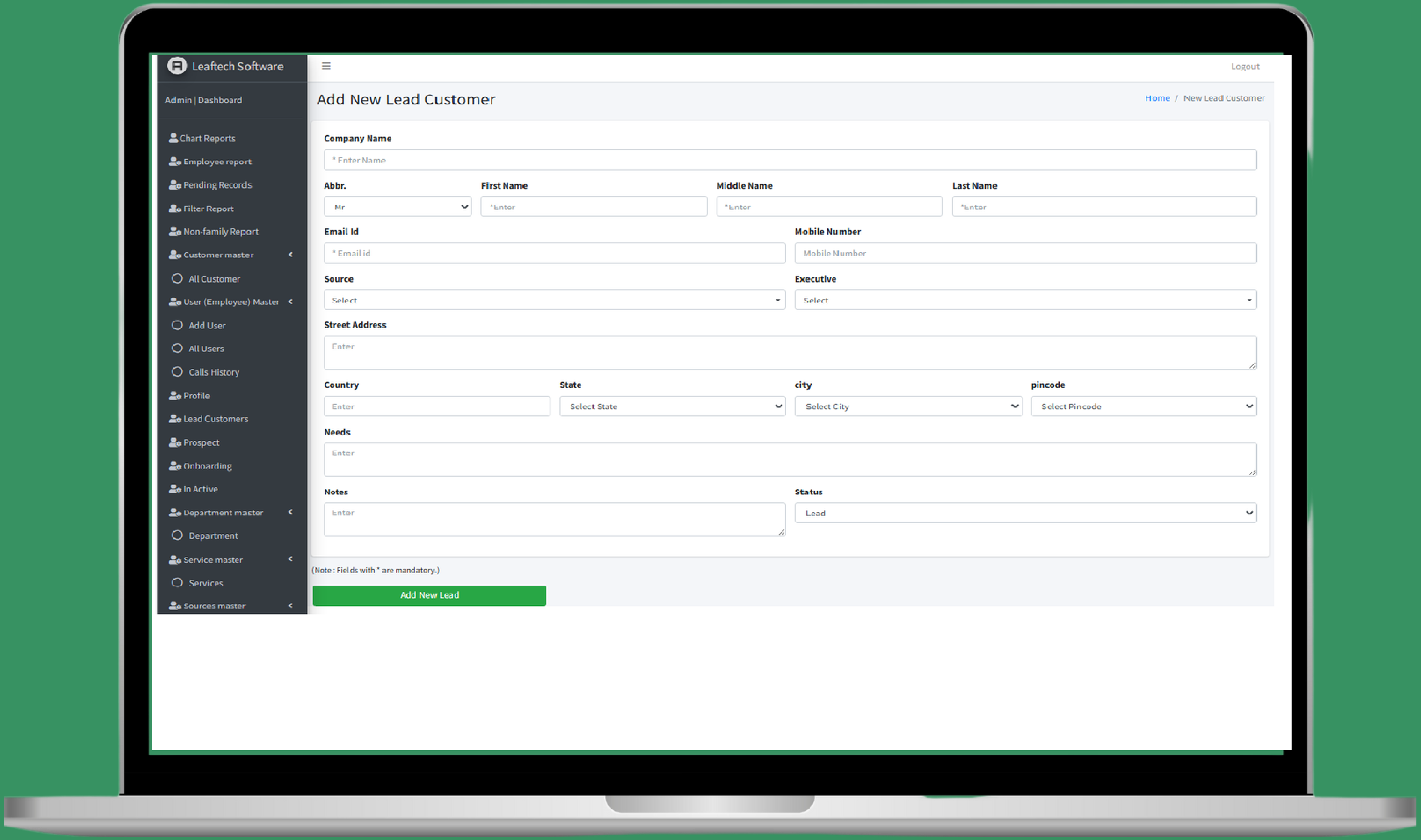
- Viewing Employee Report from Certain time period by using date form
- Exporting, Updating and Deleting Exporting list in CSV, Excel, PDF, Print.



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.



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

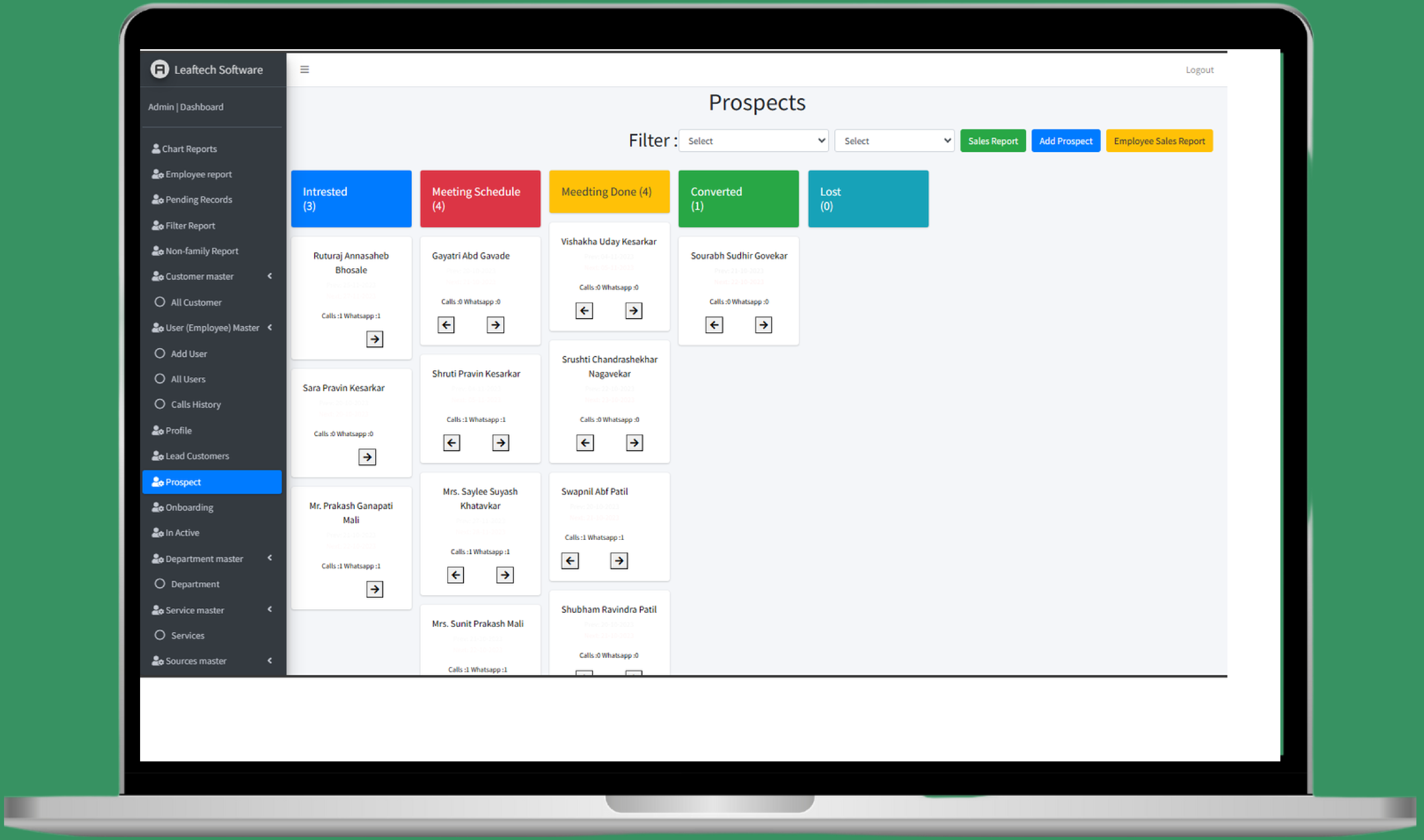
through clicking on Add prospect or if want to view

Employee sales report filtering using date ways

we can do it by clicking on Employee Sales Report

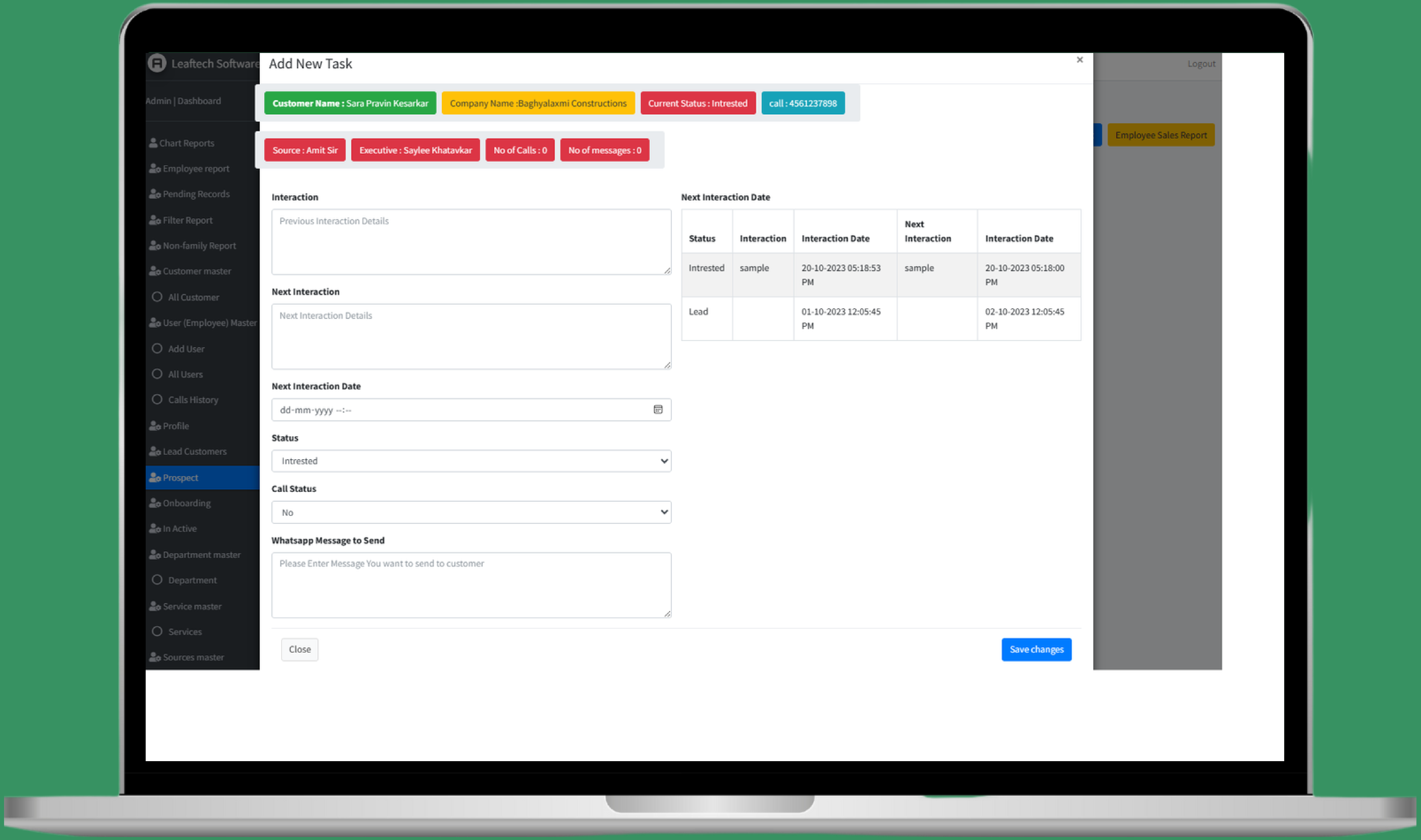
button, also we can view details of Sales Report by

clicking on Sales Report



Masters

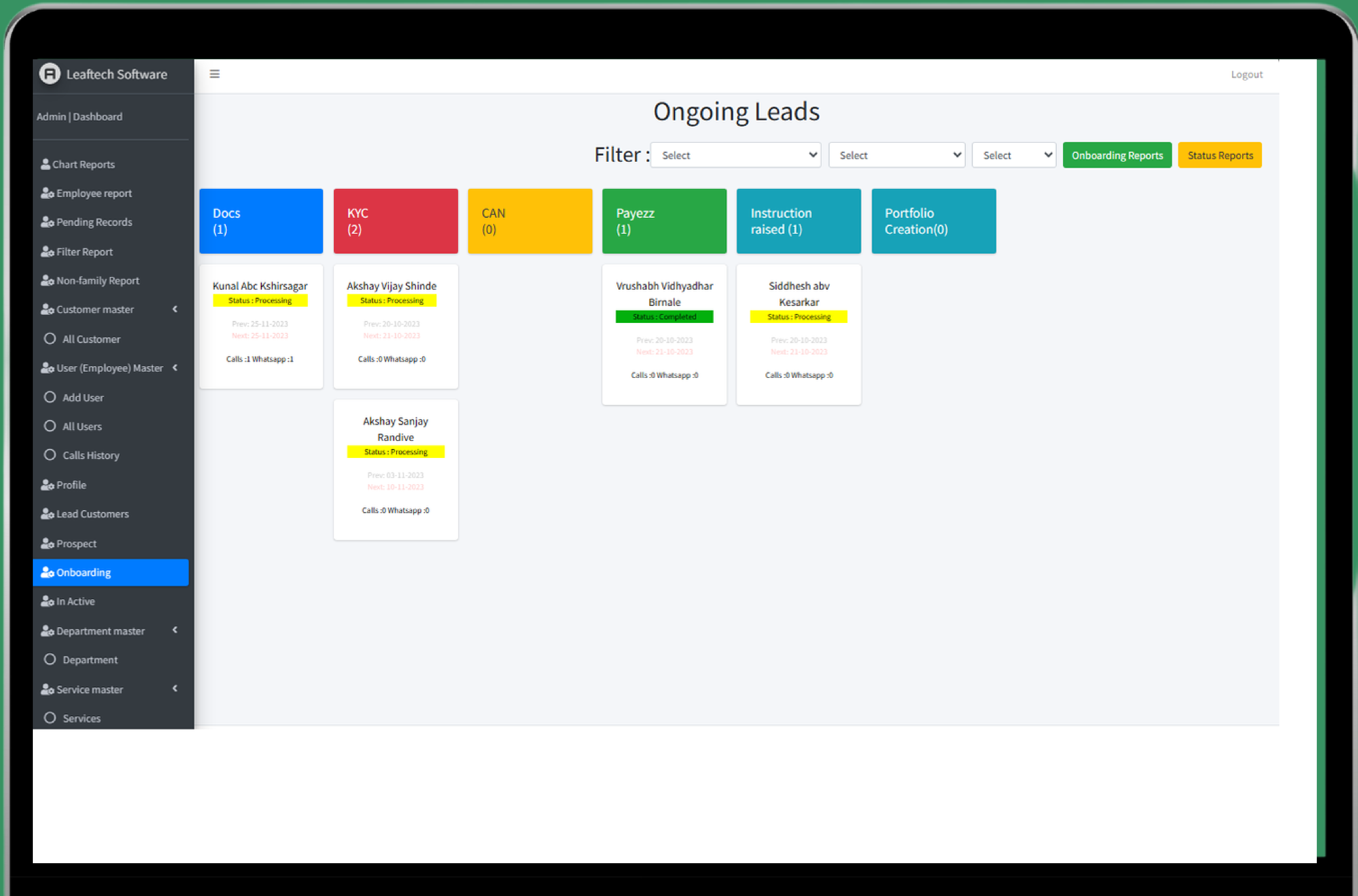
Prospect



Masters

Onboarding Leads

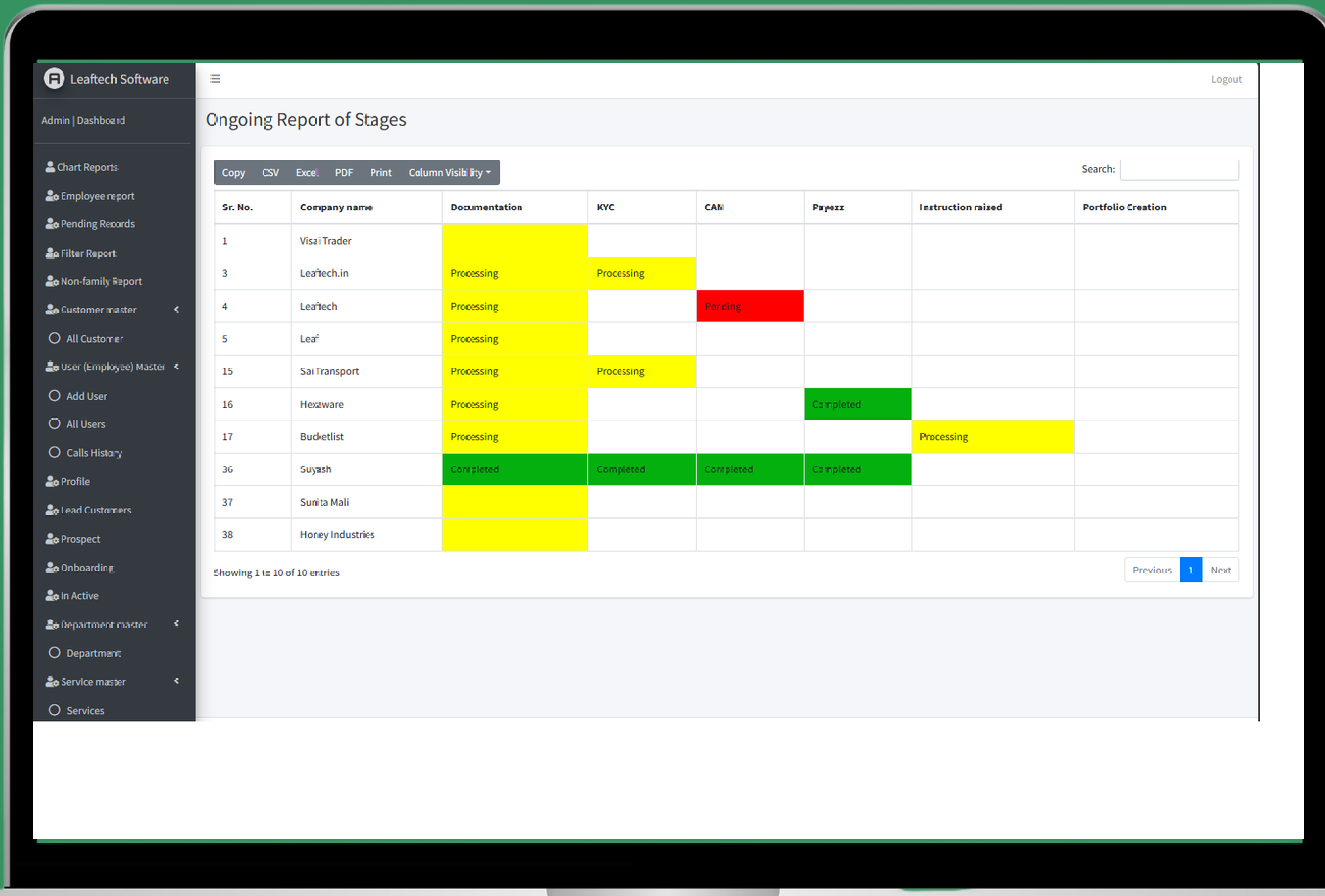
On Onboarding, after the customer is converted there is a process to join Documentation, KYC, CAN, Payezz, Instruction raised, Portfolio Creation.



Masters

Onboarding Leads

- 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.



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						

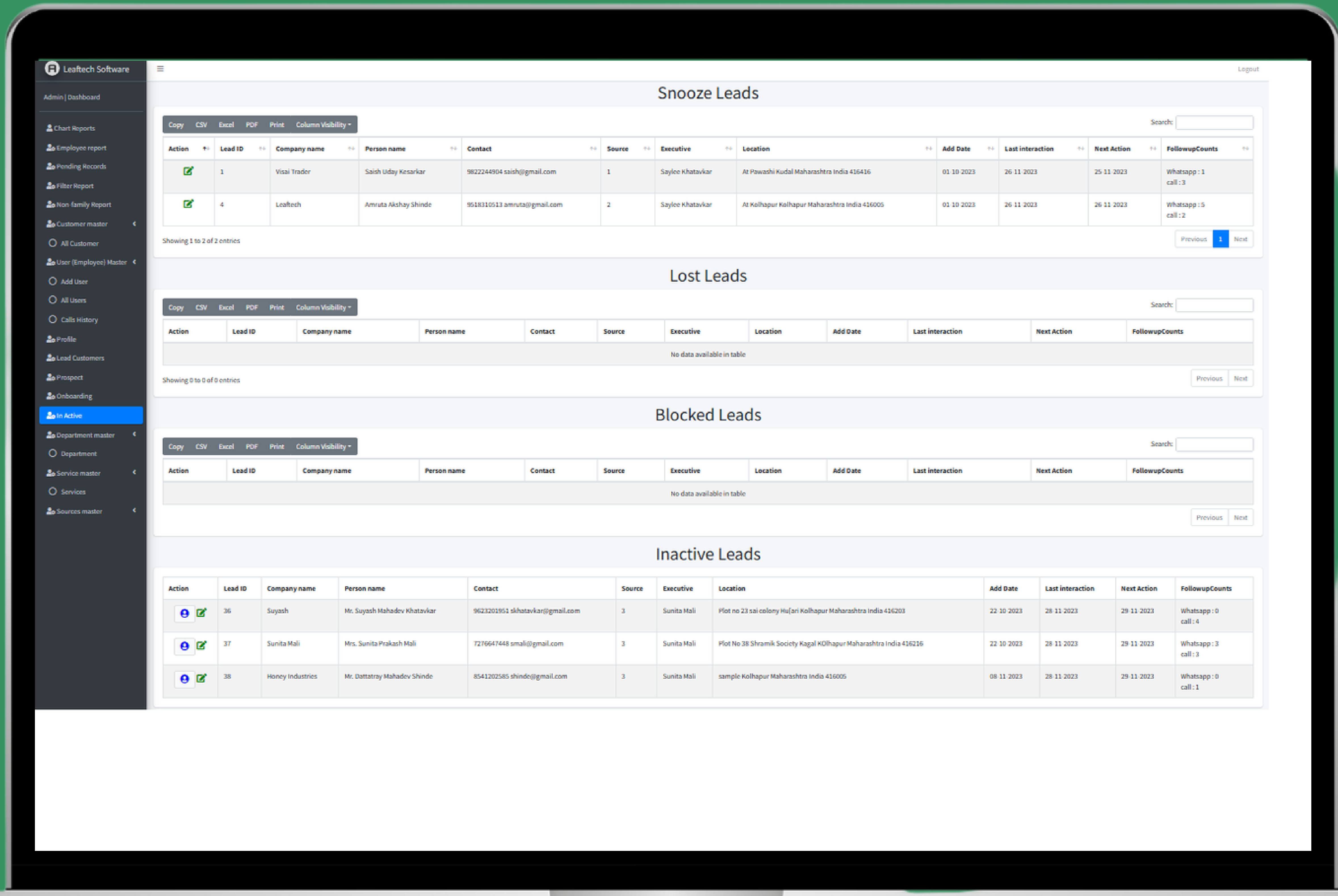
Showing 1 to 10 of 10 entries

Previous 1 Next

Masters

In Active

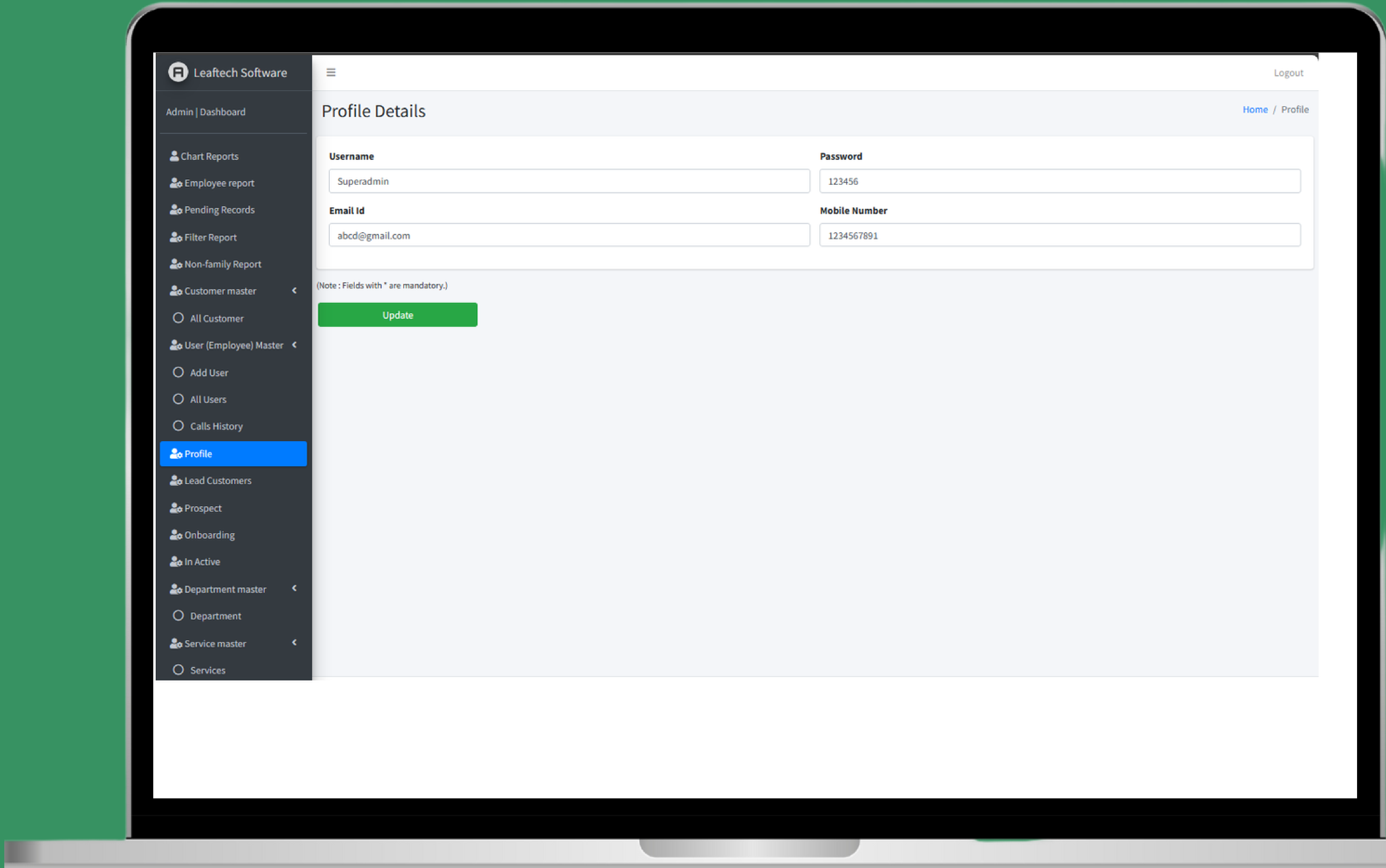
Inactive list, here we can find out that the customer who are not interested will be in the Inactive particular list. If the customer is not interested from the snooze one will be displayed in the snooze inactive list Same as if the customer is not interested from the Lost leads will be displayed in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



Masters

Profile

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

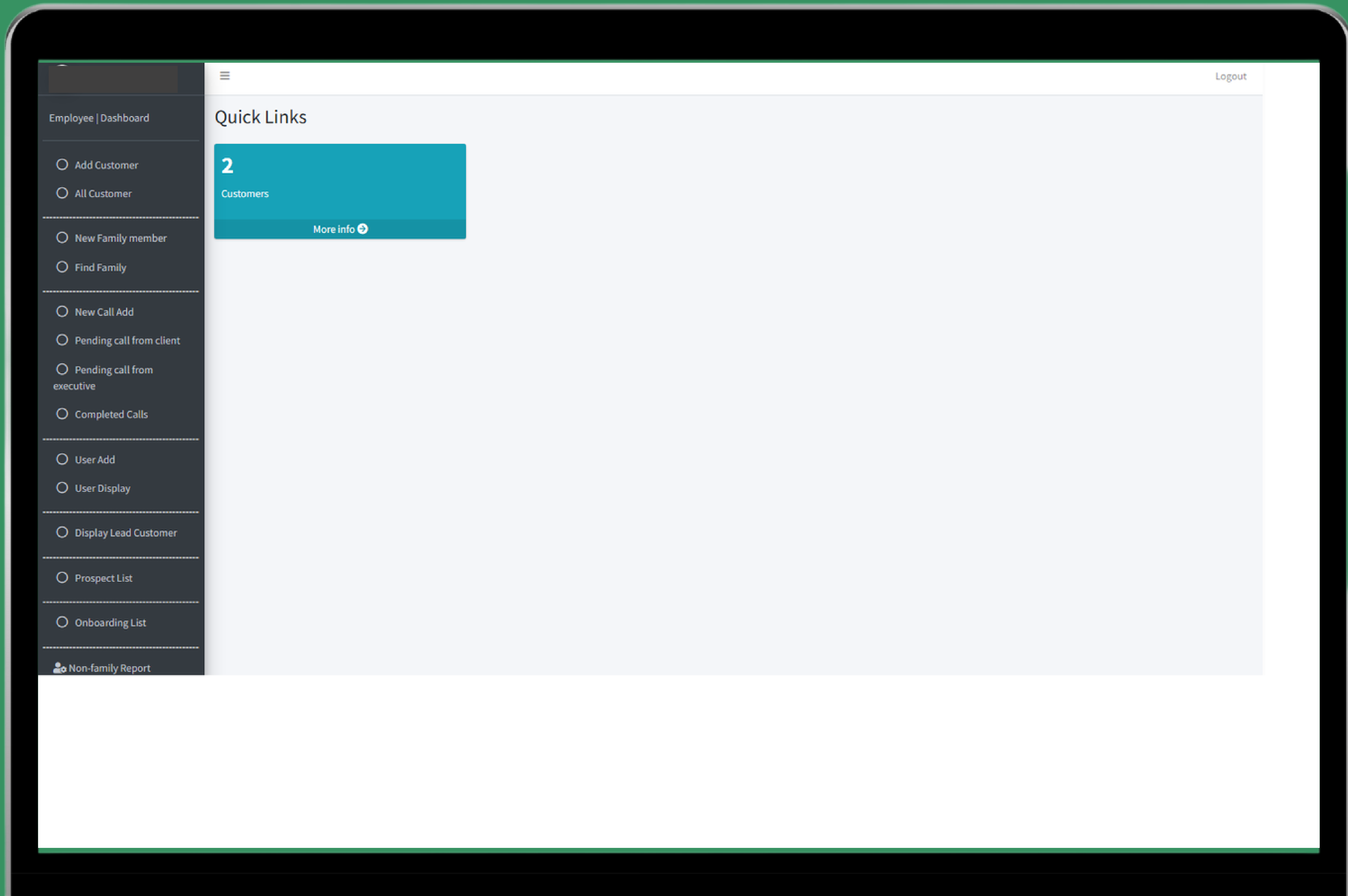


Dashboard Overview

Employee Login

The Dashboard provides a snapshot of

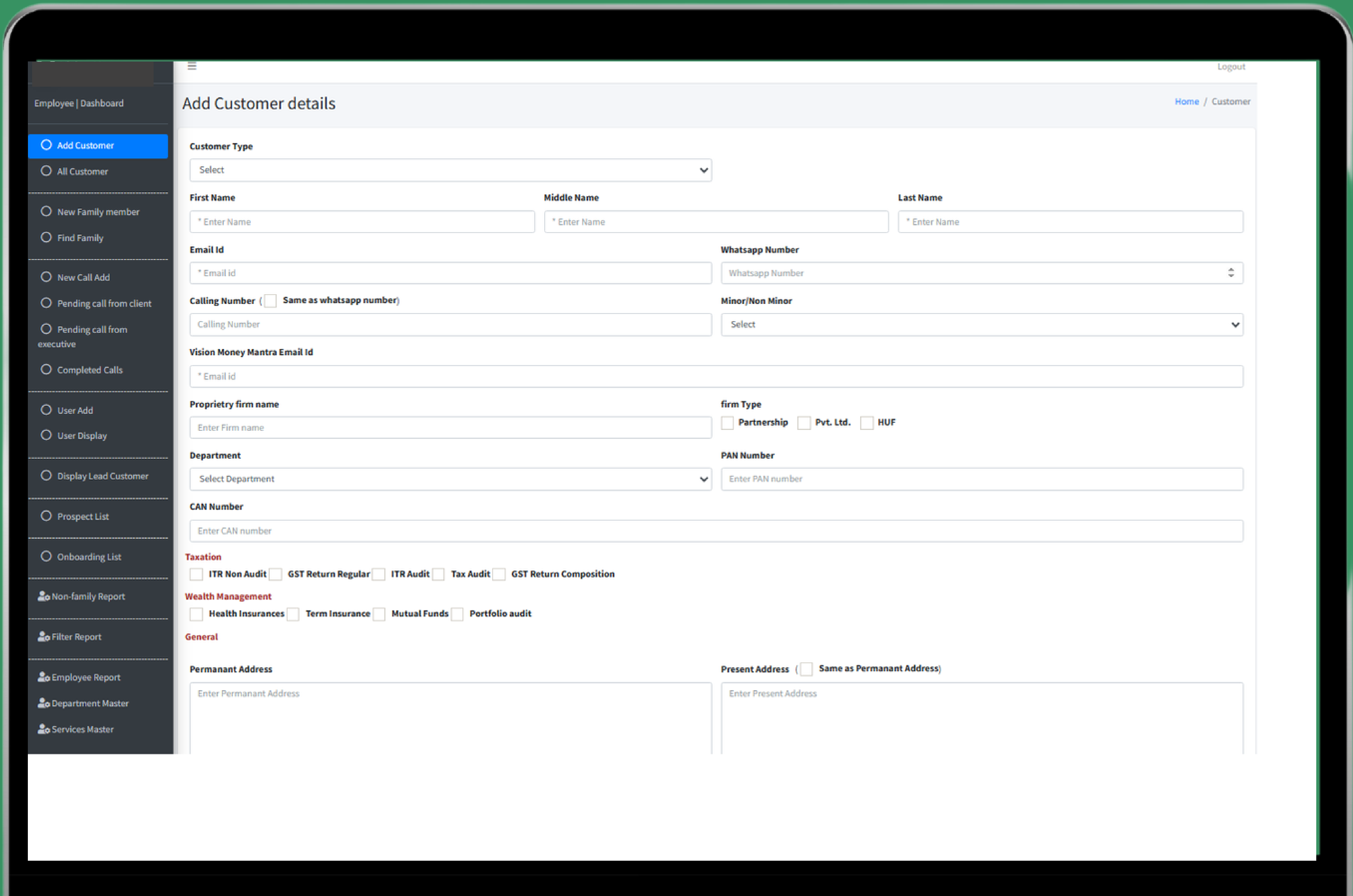
- Customers
- Employees
- Department
- Services



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.



Masters

Customers

Key Functionalities:

1. Accessing Customer List:
    - Navigate to the "Customers" section in the application.
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3. Filtering and Sorting Options:
    - Utilize filtering options to streamline your view based on customer status, alphabetical order, or other criteria.
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4. Editing Customer Information:
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5. Exporting, Updating and Deleting :
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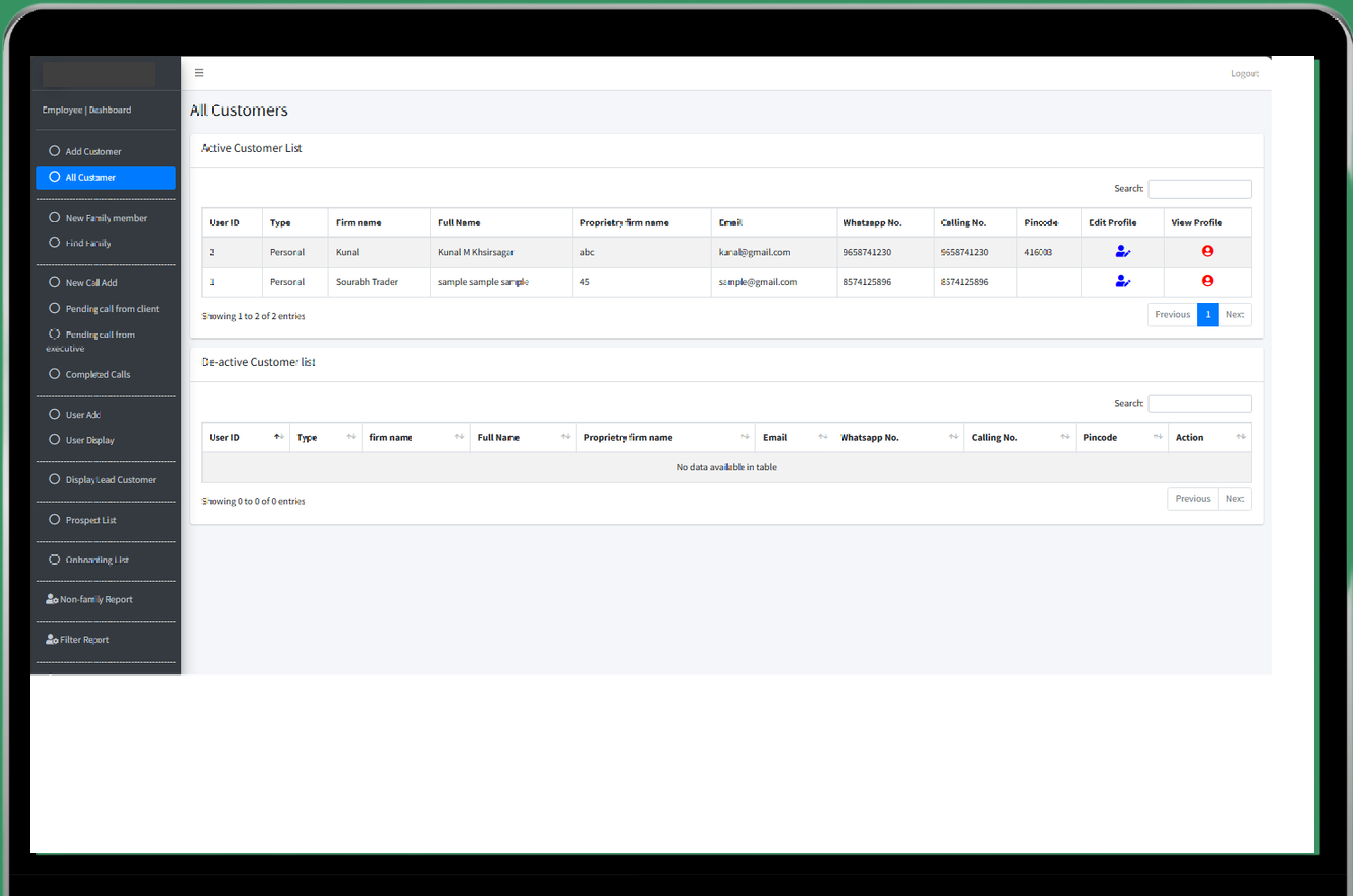
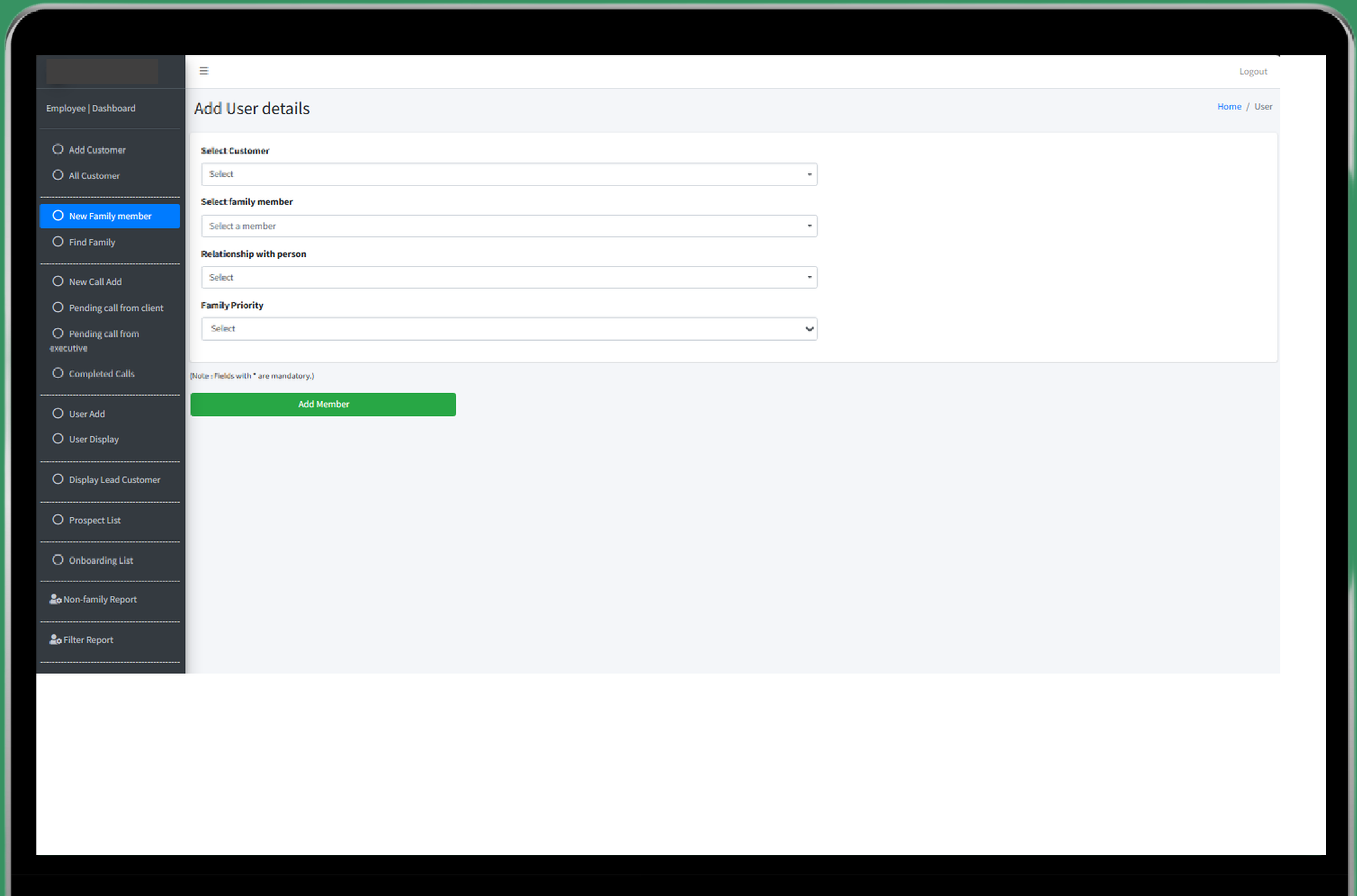


Masters

Customers

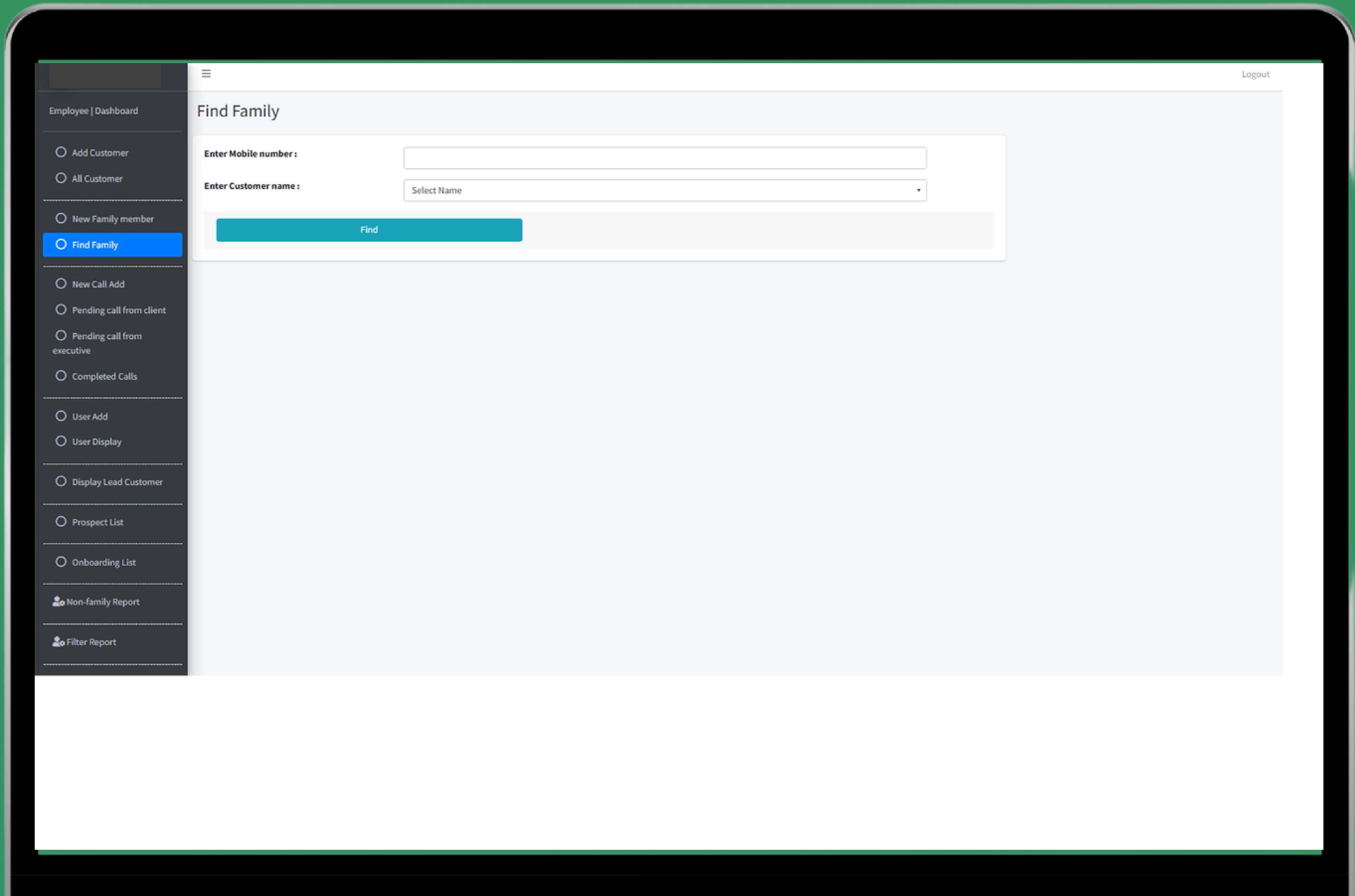
- Adding a New Family Member/New Customer: Navigate to the "New Family Member" section in the application.
- Click on the "Add Customer" button / Form to create a new customer profile.
- Input the required details, including customer name, contact information, and any additional details.
- 2. Managing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



Masters

Customers

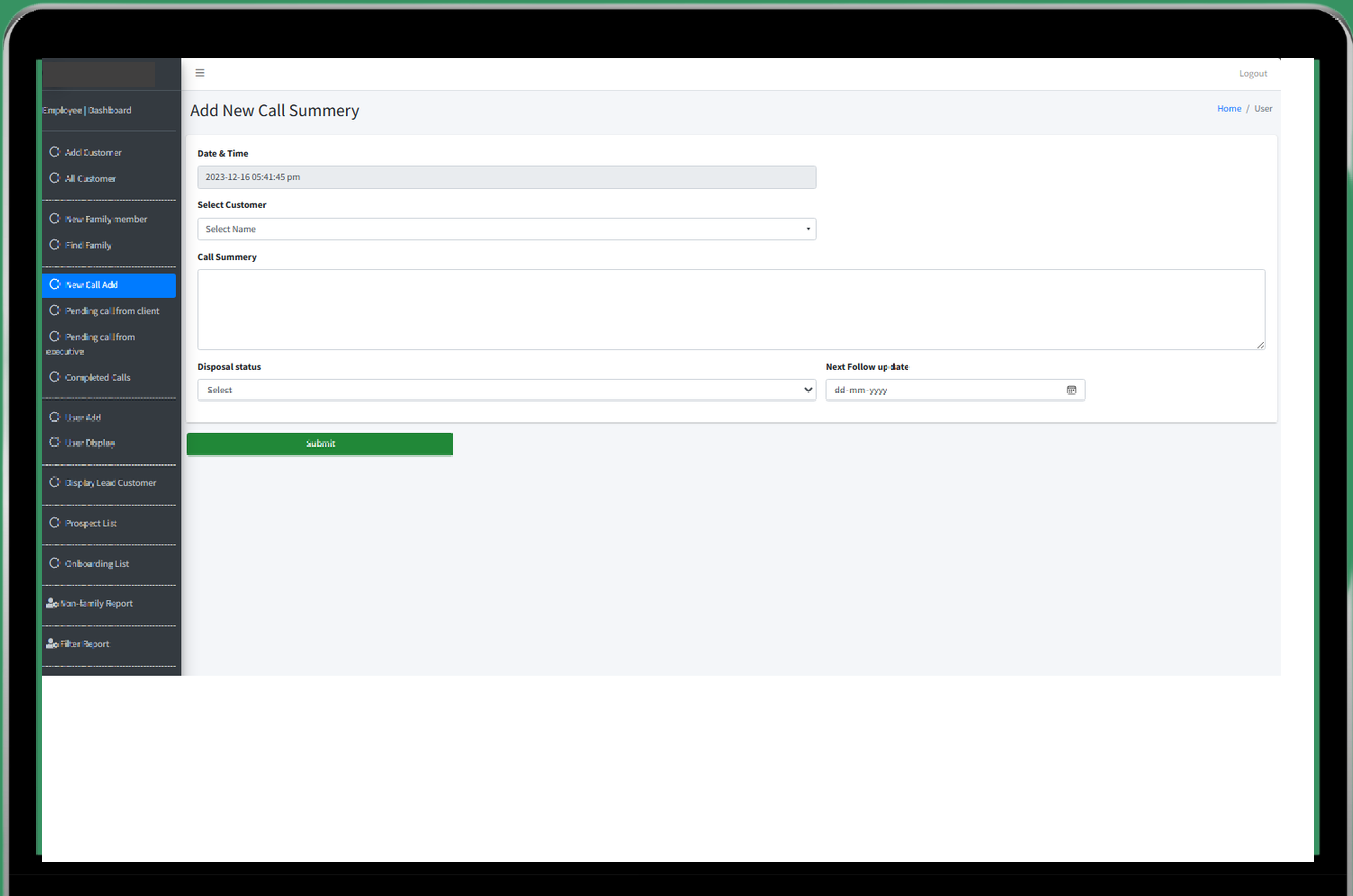
After Adding a New Family Member
We can search existing family members by mobile number or customers name



Masters

New Call

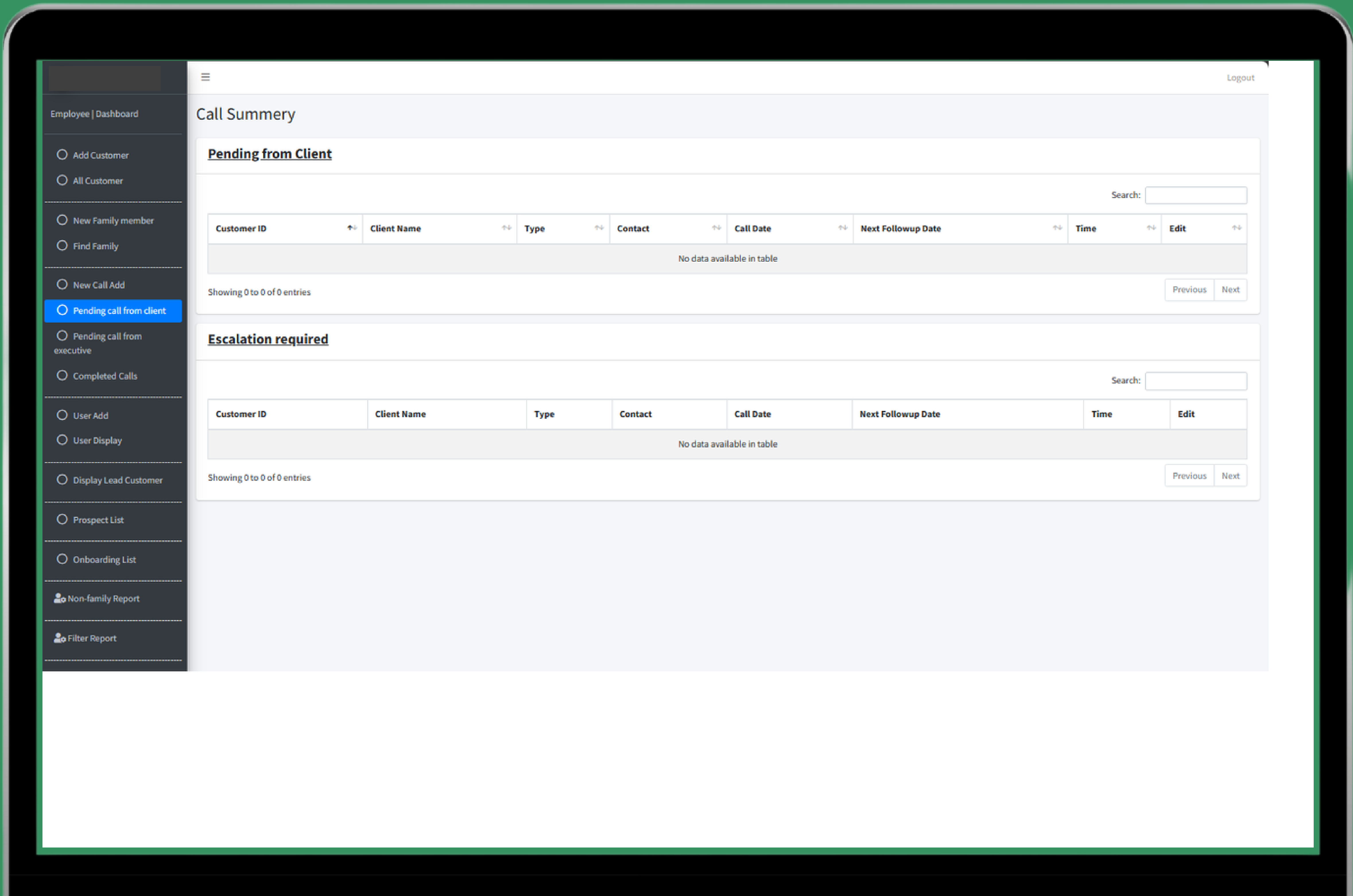
Add New Call Summary update date and time status of call update new follow up date and disposal status



Masters

Pending Call

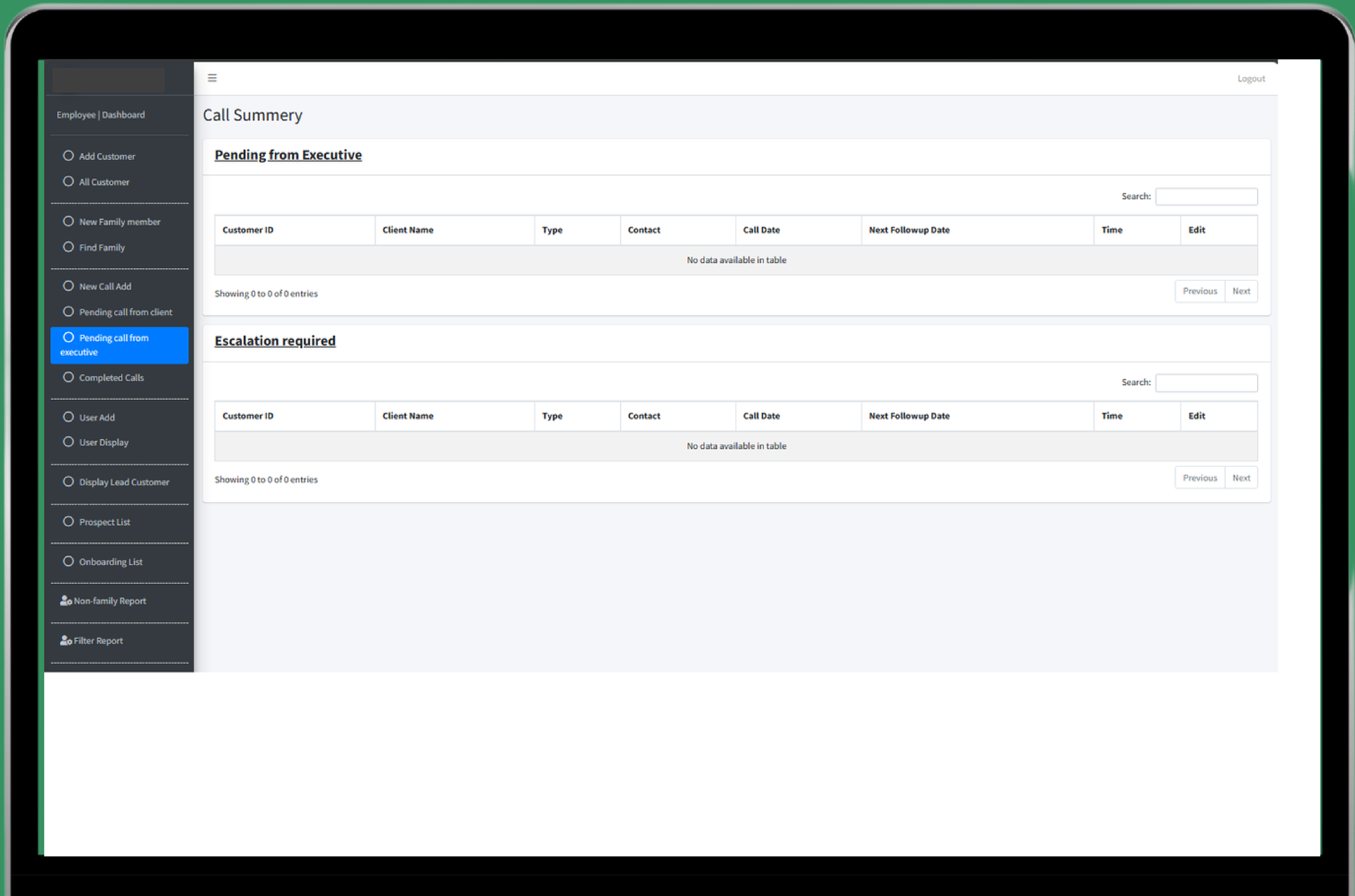
Pending Call Summary update of individual client data such as time,client info,date,etc



Masters

Pending Call From Executive

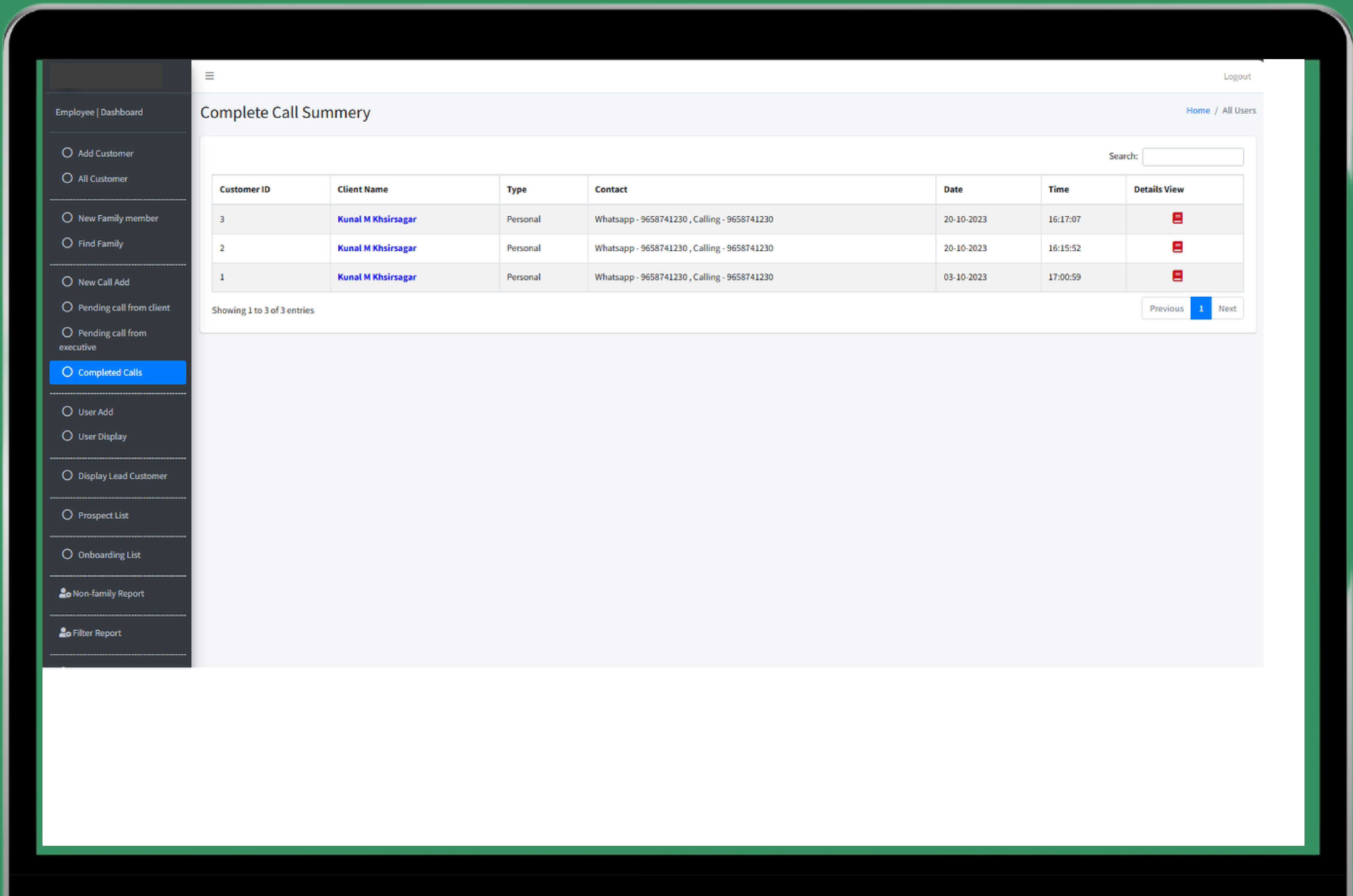
Pending Call Summary update of individual Executive data such as time,client info,date,etc



Masters

Completed Call

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



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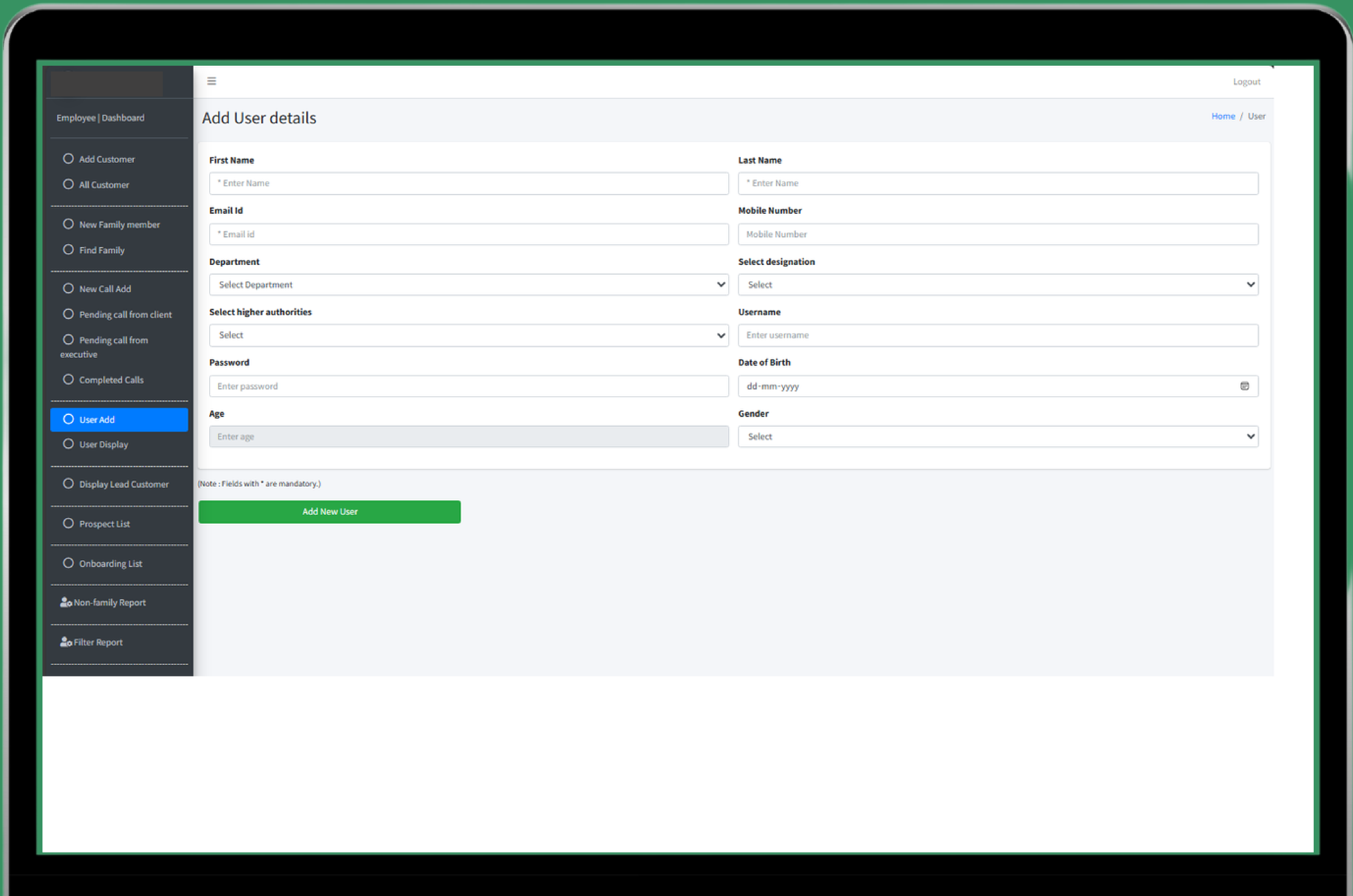

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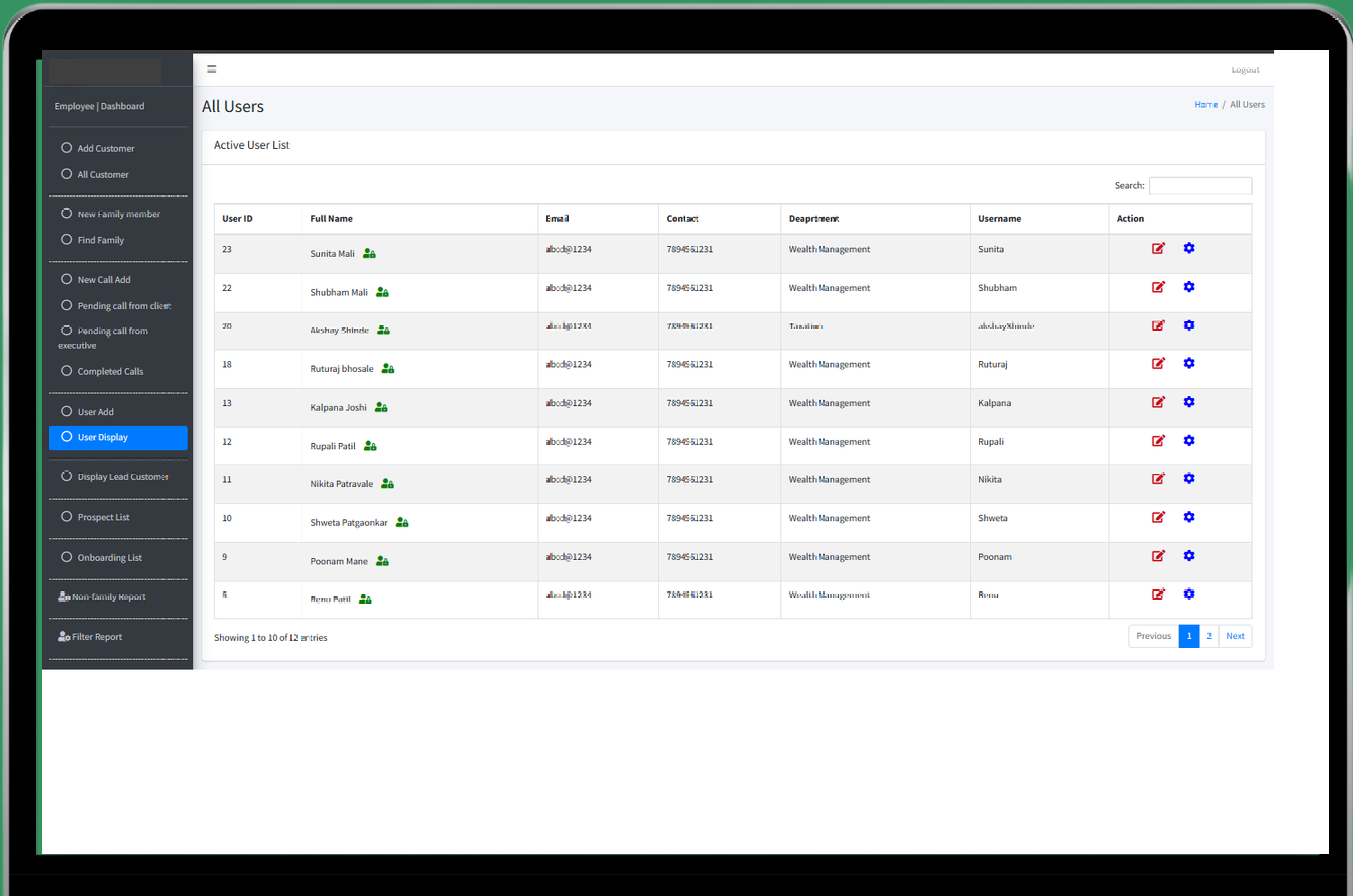
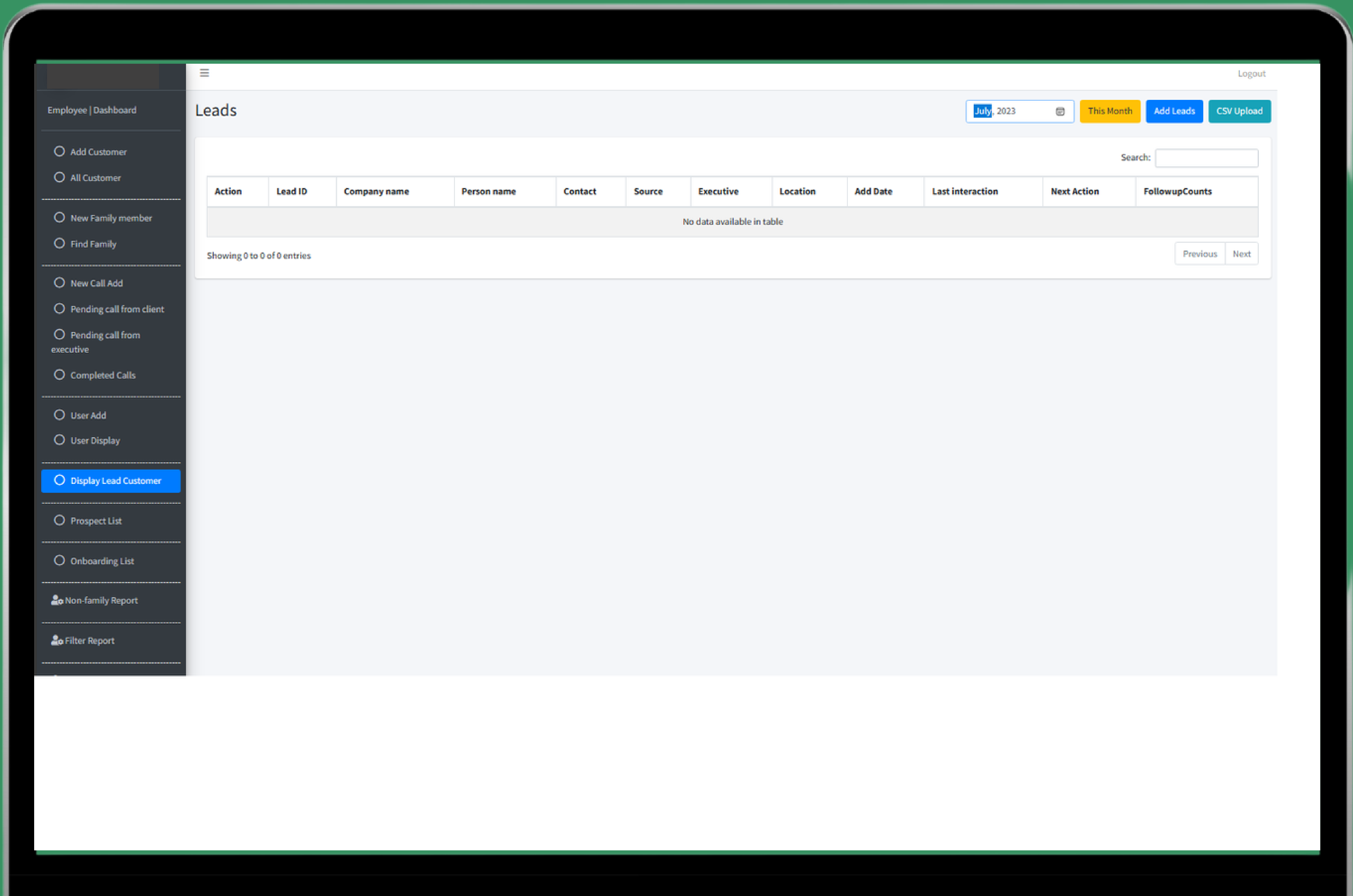


Masters

Lead

Viewing Lead Customer Report



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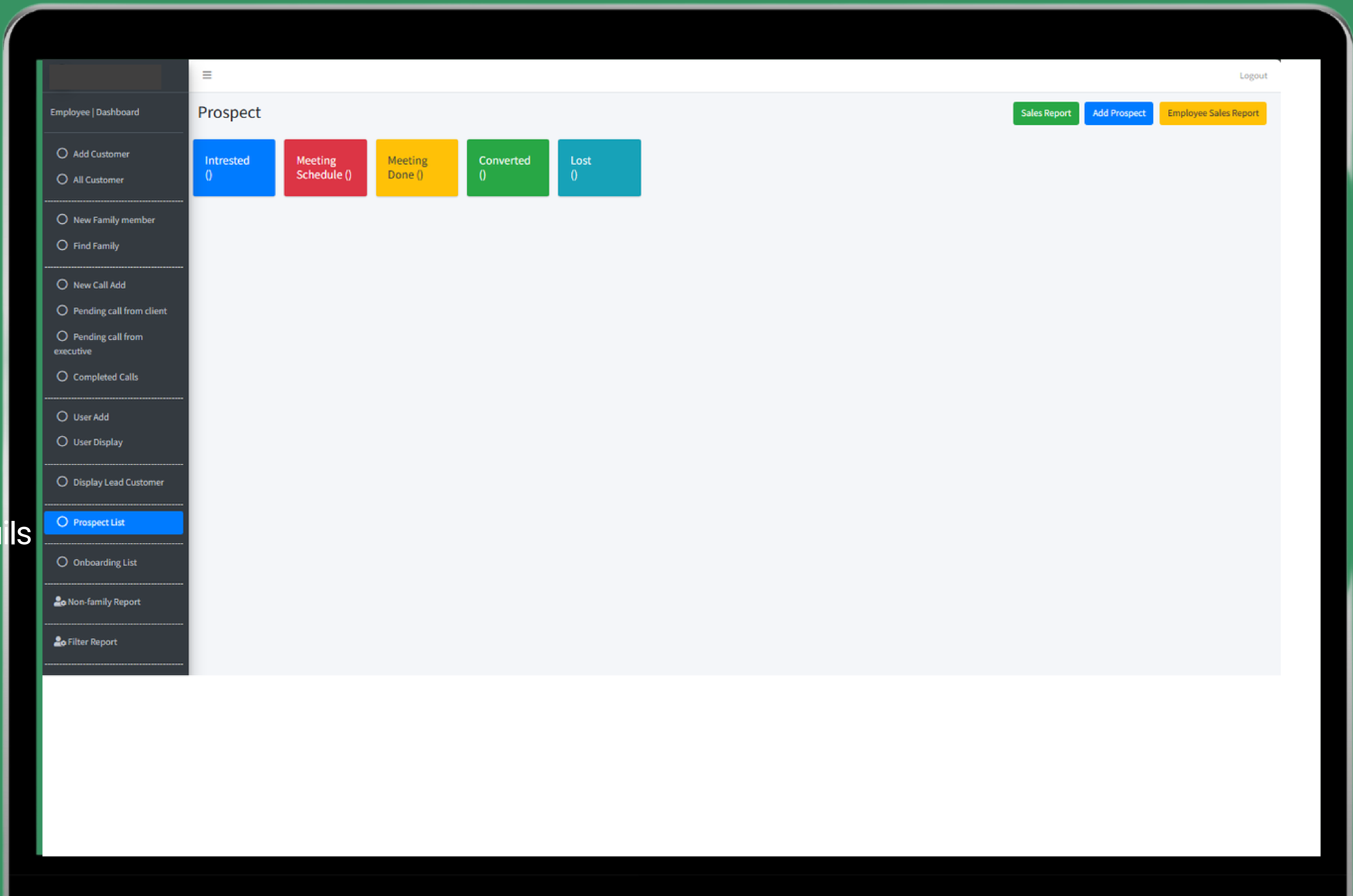

Masters

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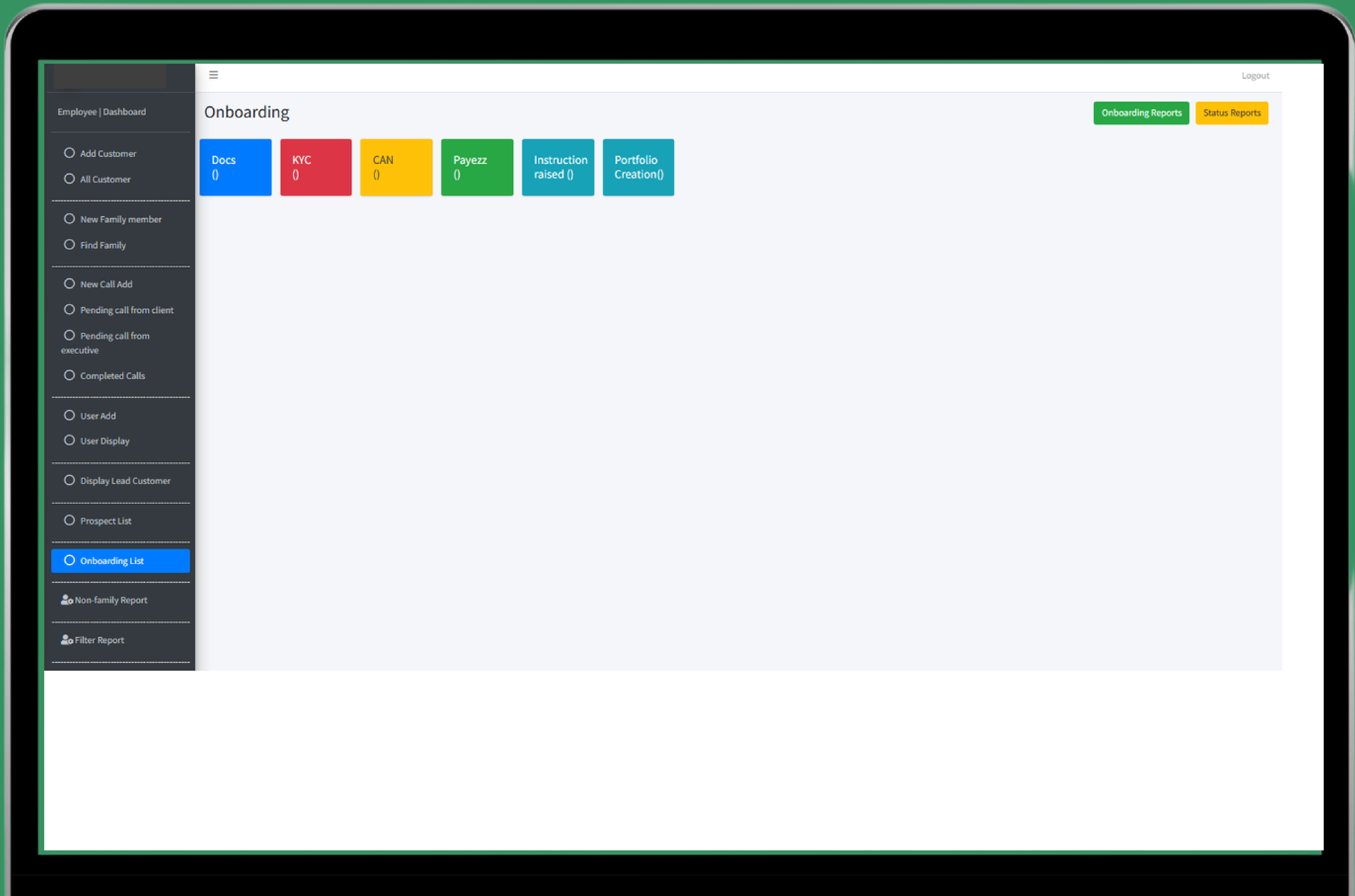
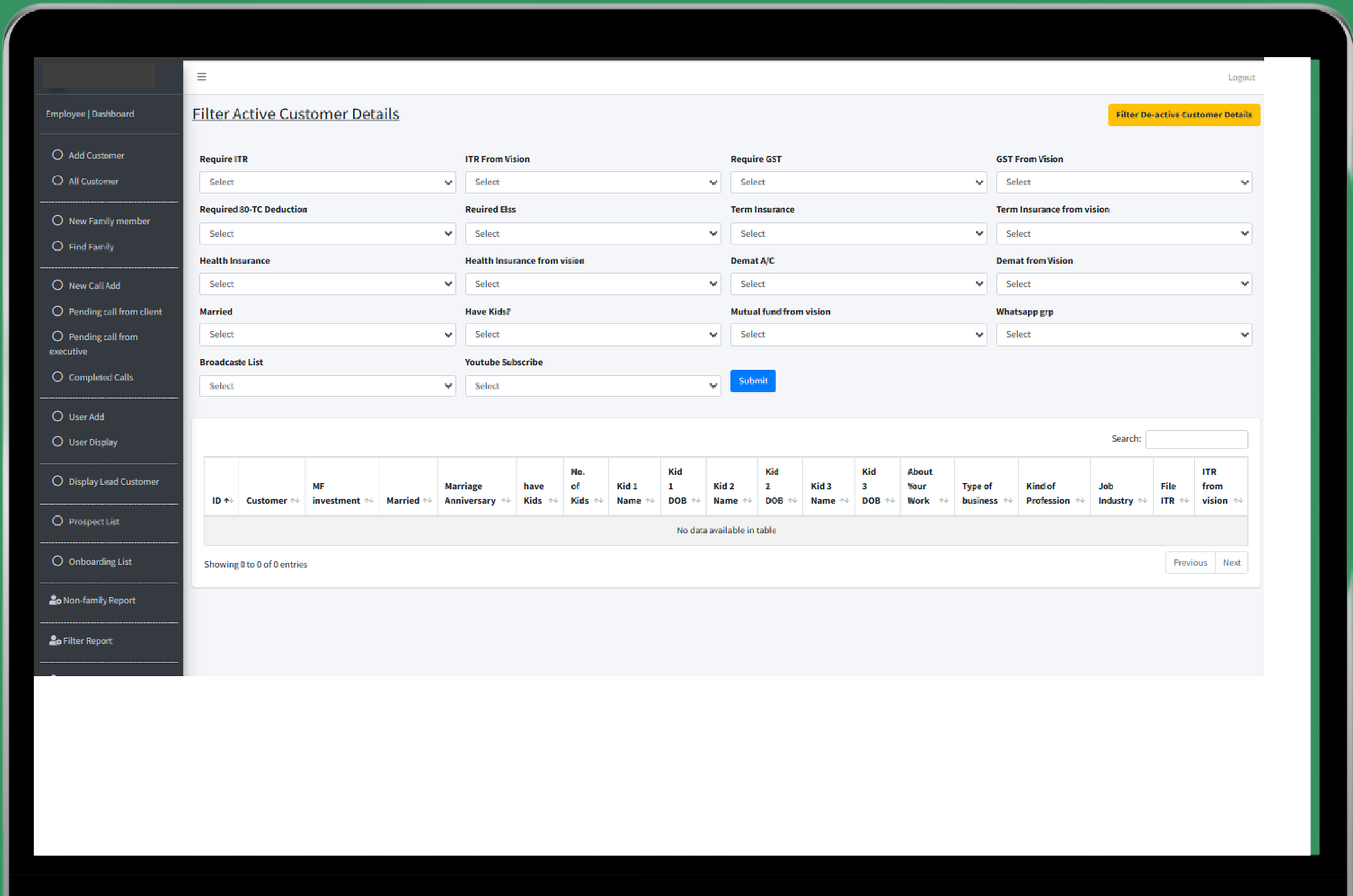


Masters

Filter Report

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.



Masters

Employee Report

- Viewing Employee Report from Certain time period by using date form

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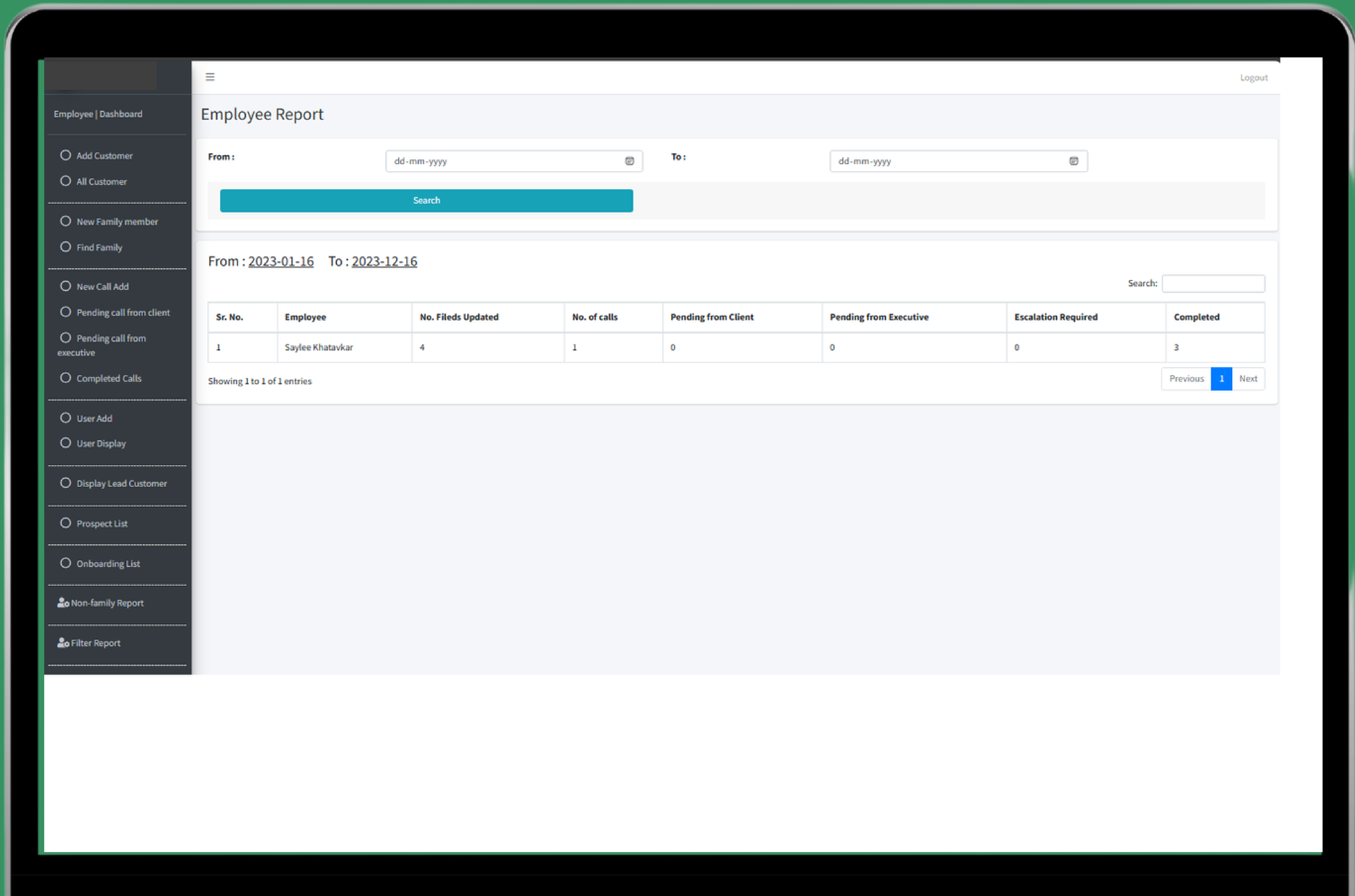

Masters

Department

- Viewing Department Id by using form and updating the data.

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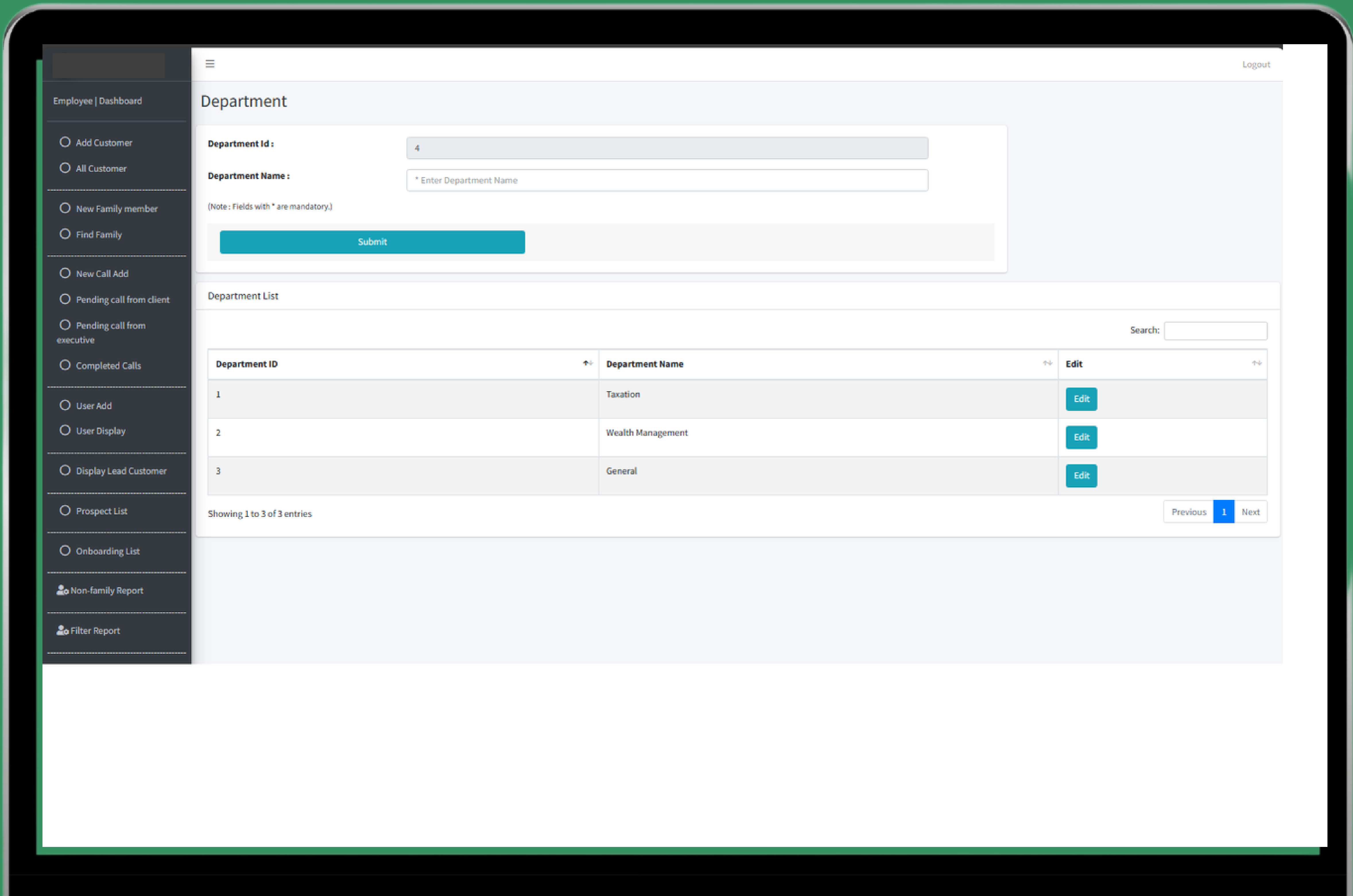

Masters

Service

- Viewing Services Report by using form and updating the data.

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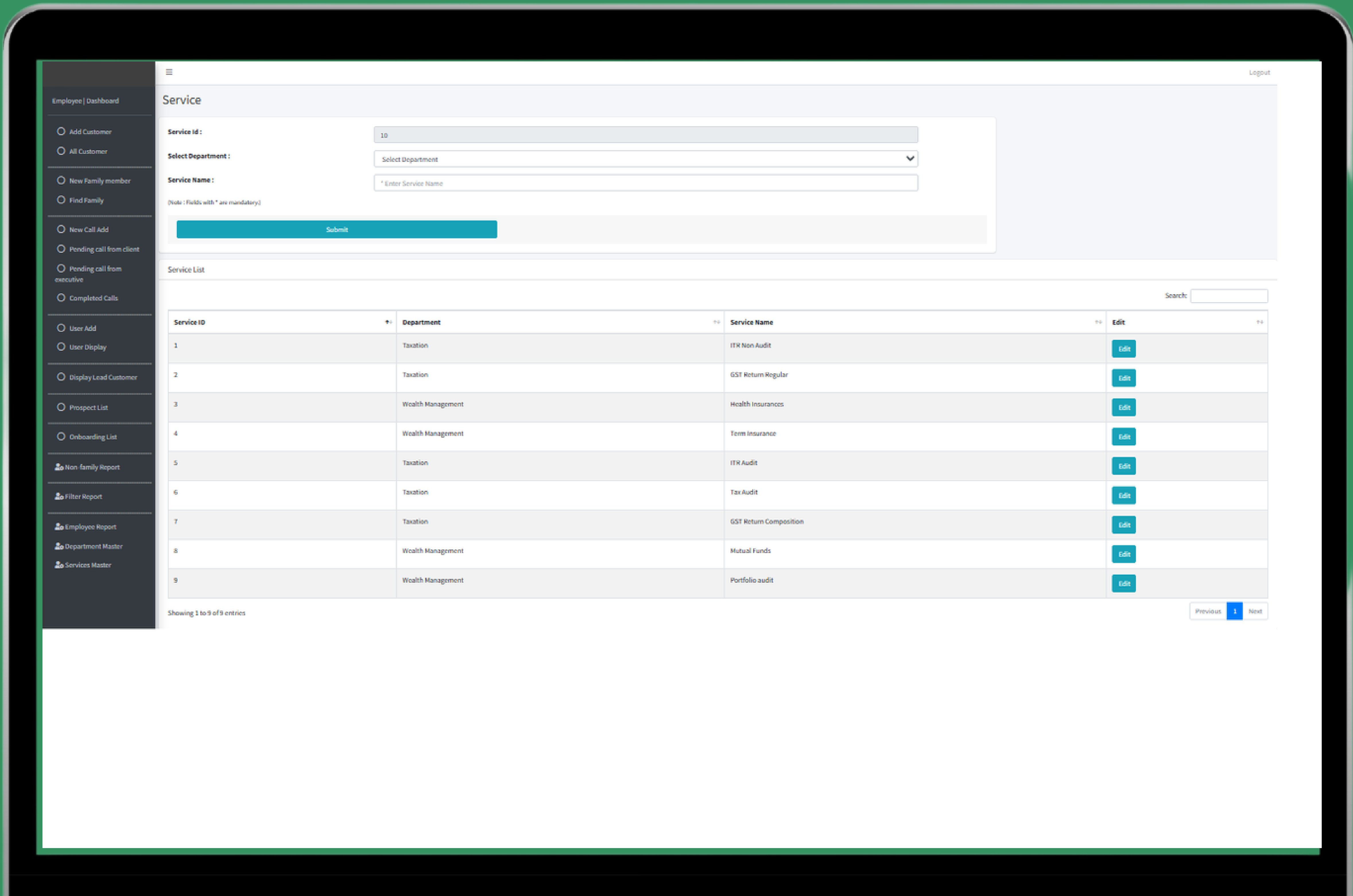

FEATURED

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

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TESTIMONIAL

Future of Software Solutions with LeafTech

Billing and Stock Managment 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

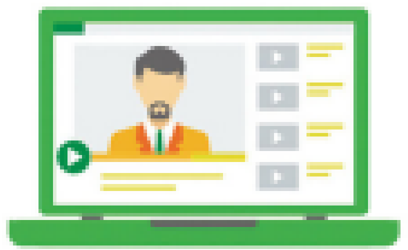
1. Network
2. Stand Alone
3. ERP
4. Custmised
5. Electronic Device Interface

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

CONTACT

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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