

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



5223 CUSTOMUSER USING THIS APPLICATION MODULES WE COVER

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.



st

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.



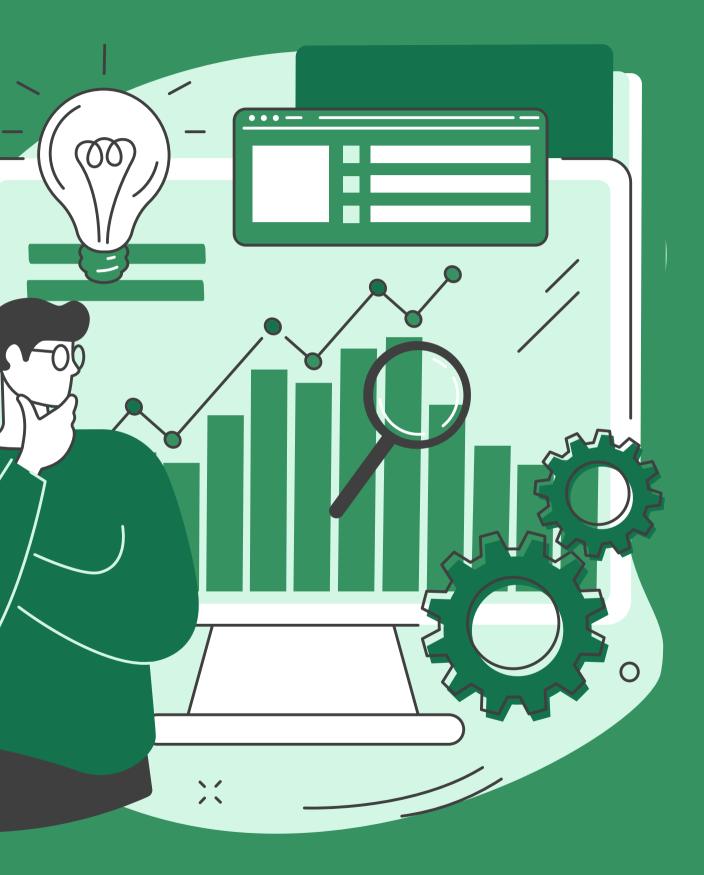
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Billing and Accounting

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

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**

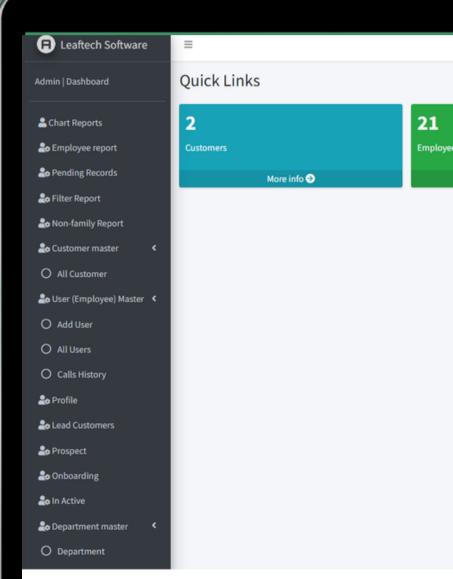
The features of the actual software may be different in understanding documentation is just a guideline of our proposed projects though we recommend you to test all features before purchase





Dashboard Overview

- The Dashboard provides a snapshot of
- Customers
- **—** Employees
- Department
- Services



Super Admin Login

		Logout
	3	9
ees	Department	Services
More info 🤿	More info 🔮	More info 🤿

• 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.

Leaftech Software	=
in Dashboard	Add User details
Chart Reports	First Name
Employee report	* Enter Name
Pending Records	Email Id
Filter Report	* Email id
Non-family Report	Department
Customer master 🔍	Select Department
All Customer	Select higher authorities
User (Employee) Master 🔇	Select
Add User	Password
All Users	Enter password
Calls History	Age
Profile	Enter age
Lead Customers	
Prospect	(Note : Fields with * are mandatory.)
Onboarding	Add New User
In Active	
Department master <	
Department	
Service master <	



	Log	out
	Home / U	Jser
	Last Name	
	* Enter Name	
	Mobile Number	
	Mobile Number	
	Select designation	
*	Select	•
	Username	
*	Enter username	
	Date of Birth	
	dd-mm-yyyy	
	Gender	
	Select	-

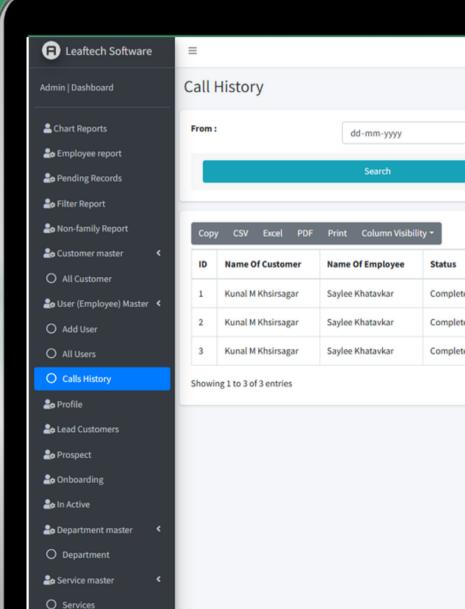
1. Accessing Users List:

- 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.

													All them
imin Dashboard	All Users												Hume / All Users
Chart Reports	Active User List												
e Employee report	Copy CSV Excel P	PDF Print Column Visibi	lity *									Search:	
e Filter Report	UserID	Full Name		Email		Contact	Deaprtme	ent	Usermame		Action	Authorities	
Non-family Report	23	Sunita Mali 🚨		abcd@1234		7894561231	Wealth Ma	lanagement	Sunita		C.		٠
Customer master All Customer	22	Shubham Mali 🔒		abcd@1234		7894561231	Wealth Ma	lanagement	Shubham		ß		٥
lø User (Employee) Master 《	21	Amruta Shinde		abcd@1234		7894561231	Taxation		amrutas		ß		٠
Add User All Users	20	Akshay Shinde		abcd()1234		7894561231	Texation		ekahayShind	ŝe	ß		٠
Calls History	19	Sourabh Govekar 🔒		abcd@1234		7894561231	General		saurabh		ß		٠
e Fronie le Lead Customers	18	Ruturaj bhosale 🔒		abcd@1234		7894561231	Wealth Ma	lanagement	Ruturaj		ß		٥
e Prospect e Onboarding	13	Kalpana Joshi 🔒		abcd@1234		7894561231	Wealth Ma	lanagement	Kalpana		ß		٥
e In Active	**	Rupali Patil 🔒		abcdgr12.5%		7894561231	wealth Mar	lanagement	нирал		ß		٠
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Service master 4	10	Shweta Patgaonkar		abcd(01234		7894561231	Wealth Ma	lanagement	Shwetta		ß		٠
Sources master	Showing 1 to 10 of 20 entries											Previo	ous 1 2 Next
	De-Active User List												
	Copy CSV Excel P	PDF Print Column Visibi	dity =									Search:	
	User ID	•-	Full Name	**	Email		++	Contact	**	Deaprtment			14
	16		asd sdf 🔒		nbcd@1234	4		7894561231		Wealth Management			
	Showing 1 to 1 of 1 entries												Previous 1 Next



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





				Logout
	То	:	dd-mm-yyyy	
				Search:
	Operation	Date Time	Fields Updated	Summery
ete	Master Details Updated	2023-10-20 16:17:07	1 Fields Updated	20-10-2023 16:17:07 : Complete (In Details Form 1 Fileds Updated)
		2023-10-20 16:17:07 2023-10-20 16:15:52	1 Fields Updated 3 Fields Updated	20-10-2023 16:17:07 : Complete (In Details Form 1 Fileds Updated) 20-10-2023 16:15:52 : Complete (In Details Form 3 Fileds Updated)
ete	Master Details Updated			

Viewing Services Report by using form and updating the data.

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

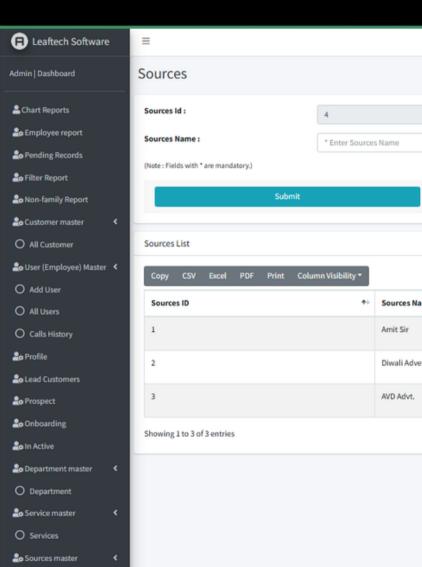
Leaftech Software	=			
min Dashboard	Service			
Chart Reports	Service Id :		10	
🗴 Employee report	Select Department :		Sel	ect Department
Pending Records				ect bepartment
o Filter Report	Service Name I		* Er	nter Service Name
o Non-family Report	(Note · Fields with * are mandatory)			
🖕 Customer master 🛛 ≮		Submit		
O All Customer				
o User (Employee) Master 🔇 🔇	Service List			
) Add User				
) All Users	Copy CSV Excel PDF	Print Col	umn Vi	sibility -
Calls History	Service ID		≁⊬	Department
ø Profile	1			Taxation
Dead Customers Prospect	2			Taxation
g Onboarding	3			Wealth Management
	4			Wealth Management
p Department master C Department	5			Taxation
Service master <	6			Taxation
) Services	U U			laxación
g Sources master 🛛 ≮	7			Taxation
	8			Wealth Management
	9			Wealth Management



			L	ogout
	~			
			Search:	
^↓	Service Name	^↓	Edit	^₩
	ITR Non Audit		Edit	
	GST Return Regular		Edit	
ıt	Health Insurances		Edit	
t	Term Insurance		_	
k.			Edit	
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	Tax Audit		Edit	
	GST Return Composition		Edit	
it	Mutual Funds		Edit	
t	Portfolio audit		Edit	

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

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





						Logout
					Search:	
ame	↑↓	Edit	₩	Delete		^↓
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ertising Post		Edit		Delete		
		Edit		Delete		

Previous 1 Next

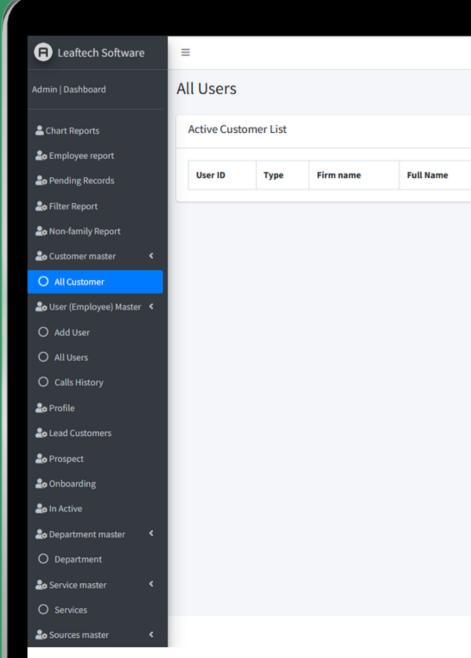
Viewing Department Id by using form and updating the data.

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

Leaftech Software	=					Logout
Admin Dashboard	Department					
Chart Reports	Department Id :	4				
🏖 Employee report	Department Name :	* Enter Department Name				
Le Pending Records	(Note : Fields with * are mandatory.)					
A Pitter Report	Submit					
😂 Customer master 🛛 <						
O All Customer	Department List					
🍰 User (Employee) Master 🤇	Copy CSV Excel PDF Prin	t Column Visibility ~			Search:	
 Add User All Users 	Department ID	*⊦	Department Name	∾	Edit	$\uparrow \!$
O Calls History	1		Taxation		Edit	
🚑 Profile	2		Wealth Management		Edit	
Lead Customers					=	
Le Prospect	3		General		Edit	
20 Onboarding	Showing 1 to 3 of 3 entries				P	revious 1 Next
🚔 In Active	L					
🚑 Department master 🛛 <						

Department

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



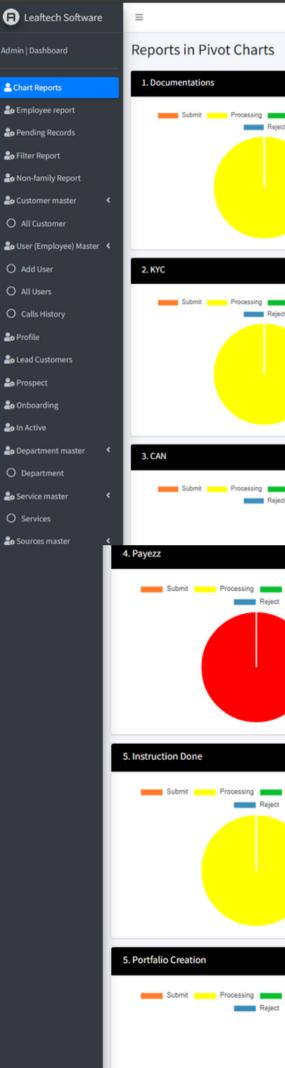


						Logout
		Ex	port Customer Details	Export Ma	aster Details	Export Calls Details
Proprietry firm name	Email	Whatsapp No.	Calling No.	City	Pincode	Action

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



				Home / ChartJ	
	Status : Processing (1)				
mplete Pending	Customer Name	LastInteraction Date	Next Date	Status	1
	Kunal	25-11-2023 12:00:00 AM	25-11-2023 12:00:00 AM	Processing	
	Status : Processing (2)				
Pending	Customer Name	LastInteraction Date	Next Date	Status	
	Akshay	03-11-2023 12:00:00 AM	10-11-2023 12:00:00 AM	Processing	
	Akshay	20-10-2023 12:00:00 AM	21-10-2023 12:00:00 AM	Processing	
	Status : Submit (0)				
mplete Pending	Customer Name	LastInteraction Date	Next Date	Status	
	Status : Payezz				
Pending	Customer Name	LastInteraction Date	Next Date	e Status	
	Status : Instruction Don	e			
plete Pending	Customer Name	LastInteraction Date	Next Date	e Status	
	Status : Portfalio Creatio	on			
plete Pending	Customer Name	LastInteraction Date	Next Date	Status Statu	s

 Viewing Employee Report from Certain time period by using date form

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

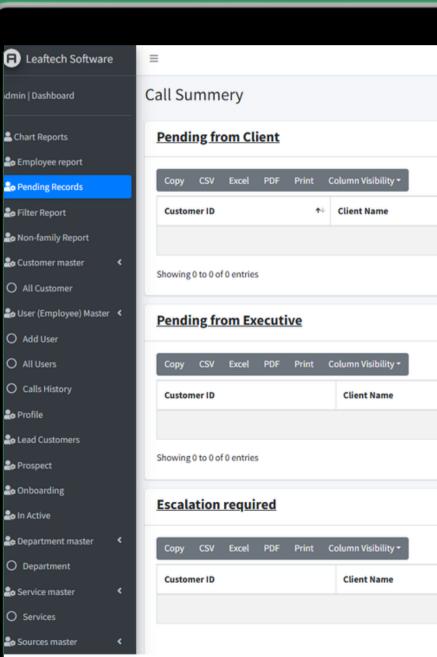
Leaftech Software	=							Logout
min Dashboard	Employe	e Report						
Chart Reports	From :	de	l-mm-yyyy		То :	dd-mm-yyyy	F	
e Employee report	_							
Pending Records			Search					
Filter Report								
Non-family Report	From : <u>20</u>	23-01-07 To: 2023	-12-07					
Customer master <	Copy CS	V Excel PDF Print	Column Visibility -				Search:	
All Customer	Sr. No.	Employee	No. Fileds Updated	No. of calls	Pending from Client	Pending from Executive	Escalation Required	Completed
User (Employee) Master <	1	Saylee Khatavkar	4	1	0	0	0	3
	Chaudian Lite	1 - 6 1					P	revious 1 Next
) All Users	Showing 1 to	1 of 1 entries					Pi	revious 1 Next
All Users Calls History	Showing 1 to	1 of 1 entries					Pi	revious 1 Next
) All Users) Calls History Profile	Showing 1 to	1 of 1 entries					P	revious 1 Next
) All Users) Calls History Profile Lead Customers	Showing 1 to	1 of 1 entries					P	revious 1 Next
) All Users) Calls History Profile Lead Customers	Showing 1 to	1 of 1 entries					P	revious 1 Next
All Users Calls History Profile Lead Customers Prospect Onboarding	Showing 1 to	1 of 1 entries					P	revious 1 Next
 All Users Calls History Profile Lead Customers Prospect Onboarding In Active 	Showing 1 to	1 of 1 entries					P	revious 1 Next
 All Users Calls History Profile Lead Customers Prospect Onboarding In Active Department master 	Showing 1 to	1 of 1 entries					Pi	revious 1 Next
) Department	Showing 1 to	1 of 1 entries					Pi	revious 1 Next
 All Users Calls History Profile Lead Customers Prospect Onboarding In Active Department master 	Showing 1 to	1 of 1 entries					P	revious 1 Next

Employee Report

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.



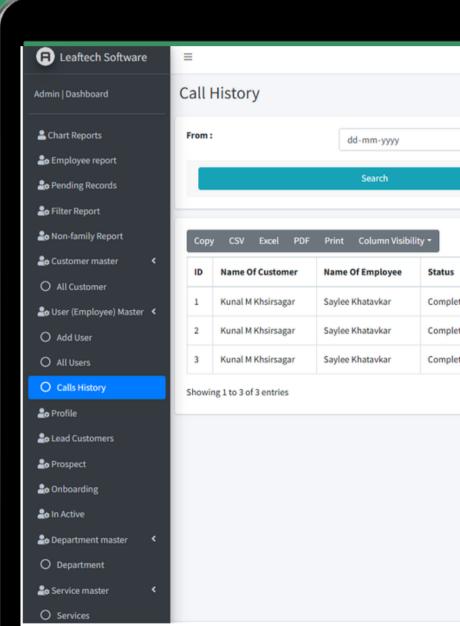
Pending Records

							Logout
						Complete Call	Details
					Search:		
₩	Туре 🗠	Contact	• Employee	$\uparrow \downarrow$	Summery		^↓
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						Previous	Next

			Search:		
Туре	Contact	Employee	Summery		
No data availab	le in table				
				Previous	Next

			Search:		
Туре	Contact	Employee	Summery		
No data availab	le in table				
				Previous	Next

 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.





				Logout	
	То	:	dd-mm-yyyy	(C)	
				Search:	
	Operation	Date Time	Fields Updated	Summery	
te	Master Details Updated	2023-10-20 16:17:07	1 Fields Updated	20-10-2023 16:17:07 : Complete (In Details Form 1 Fileds Updated)	
te	Personal Info Updated	2023-10-20 16:15:52	3 Fields Updated	20-10-2023 16:15:52 : Complete (In Details Form 3 Fileds Updated)	
te	Default	2023-10-03 17:00:59		03-10-2023 17:00:59 : Complete sample	
				Previous 1 Next	

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.

aftech Software	=						Logo		
Dashboard	Filter Active Customer Details						Filter De-active Customer Detai		
Reports	Require ITR	Require GST GST From Vision							
yee report	Select	✓ Select		Select	~	Select			
ng Records	Required 80-TC Deduction	Reuired Elss		Term Insurance		Term Insurance fro	om vision		
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family Report	Health Insurance	Health Insurance from	e from vision Demat A/C Demat from Vision						
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Customer	Married	Have Kids?		Mutual fund from vision	Mutual fund from vision Whatsapp g				
(Employee) Master 🔇	Select	Select V Select V				Select	```		
l User	Broadcaste List	Youtube Subscribe							
Users	Select	✓ Select		Submit					
ls History									
le	Copy CSV Excel PDF Print Colu	mn Visibility -					Search:		
Customers			No.			About			
pect	MF ID ↑↓ Customer ↑↓ investment ↑↓ Ma		have of Kid 1 Kids ↑↓ Kids ↑↓ Name	Kid 1 Kid 2 ↔ DOB ↔ Name ↔	Kid 2 Kid 3 Kid DOB ↑↓ Name ↑↓ DO	I3 Your B ↑→ Work ↑→	Type of Kind of business ↔ Profession ↔		
arding	ib to customer to investment to ma	Anniversary 10		bob to Name to	Name to Do	D IV WORK IV	Dusiness (* Profession (*		
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Filter Reports

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

Eeaftech Software	=											Logout
lmin Dashboard						Leac	s					
Chart Reports	Filter: Select 🗸 Select 🗸 October, 2023 🖾 Add Leads CSV Uploa									Leads CSV Upload		
Employee report	-	_	_									
Pending Records	Сору	CSV Exc	el PDF Print	Column Visibility 🕶						S	earch:	
Filter Report Non-family Report	Action	Lead ID	Company name	Person name	Contact	Source	Executive	Location	Add Date	Last interaction	Next Action	FollowupCounts
Customer master <	e Ø	12	К14	Kaustubh Chandrashekhar Nagavekar	7972020764 kaustubh@gmail.com	1	Shubham Mali	At Kolhapur Kolhapur Maharashtra India 416005	01-10- 2023	01-10-2023	02-10- 2023	Whatsapp : 0 call : 0
User (Employee) Master <) Add User	0 2	18	Sodexo	Sayali Siddhesh Kesarkar	9967070913 sayali1@gmail.com	1	Saylee Khatavkar	At Kolhapur Kolhapur Maharashtra India 416005	01-10- 2023	01-10-2023	02-10- 2023	Whatsapp : 0 call : 0
All Users Calls History	0 2	19	Sayali Photography	Sayali Suman Kesarkar	7895643211 sayali@gmail.com	1	Shubham Mali	At Kolhapur Kolhapur Maharashtra India 416005	01-10- 2023	01-10-2023	02-10- 2023	Whatsapp : 0 call : 0
Profile Lead Customers	0 2	20	Matrix	Saiprasad Ulhas Kesarkar	8378865707 saiprasad@gmail.com	1	Saylee Khatavkar	At Kolhapur Kolhapur Maharashtra India 416005	01-10- 2023	01-10-2023	02-10- 2023	Whatsapp : 0 call : 0
Prospect Onboarding	0 2	21	Oracle	Ketaki Saiprasad Kesarkar	7456981234 ketaki@gmail.com	1	Saylee Khatavkar	At Kolhapur Kolhapur Maharashtra India 416005	01-10- 2023	01-10-2023	02-10- 2023	Whatsapp : 0 call : 0
In Active Department master	0	22	Mindtree	Sanket Sanjay Patil	7854123678 sanket@gmail.com	1	Shubham Mali	At Kolhapur Kolhapur Maharashtra India 416005	01-10- 2023	01-10-2023	02-10- 2023	Whatsapp:0 call:0
Department Service master	0 2	23	LTI	Sanket Pramod Kesarkar	1230456789 sanket1@gmail.com	1	Saylee Khatavkar	At Kolhapur Kolhapur Maharashtra India 416005	01-10- 2023	01-10-2023	02-10- 2023	Whatsapp : 0 call : 0
Services Sources master	e Z	24	Indira	Sakshi Sanjay Gawade	1470258963 sakshi@gmail.com	1	Saylee Khatavkar	At Kolhapur Kolhapur Maharashtra India 416005	01-10- 2023	01-10-2023	02-10- 2023	Whatsapp : 0 call : 0

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.

Leaftech Software	-							
	=							Logout
Admin Dashboard	Add New Lead Custon	her						Home / New Lead Customer
🚔 Chart Reports	Company Name							
🚑 Employee report	* Enter Name							
🔓 Pending Records	Abbr.	First Name		Middle Name		Last Name		
📕o Filter Report	Mr V	*Entor		*Entor		*Entor		
a Non-family Report	Email Id				Mobile Number			
Lustomer master <	* Email id				Mobile Number			
O All Customer	Source				Executive			
🚔 User (Employee) Master <	Select Street Address			-	Select			-
 Add User All Users 	Enter							
O Calls History								10
2 Profile	Country		State		city		pincode	
Lead Customers	Enter		Select State	~	Select City	~	Select Pincode	~
approspect	Needs							
20 Onboarding	Enter							4
🚑 In Active	Notes				Status			
🚑 Department master 🔇 <	Enter				Lead			~
O Department				h				
🔓 Service master 🛛 <	(Note : Fields with * are mandatory.)							
O Services	Add New Lead							
🔓 Sources master 🛛 <								

Lead Customer

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

an Calca Danart
on Sales Report

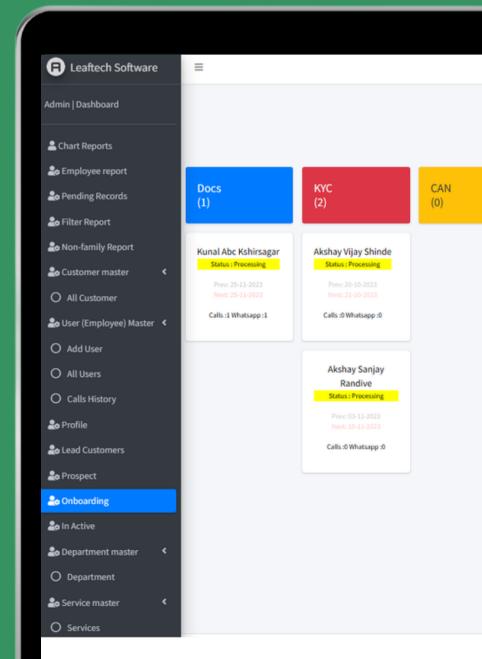
Eaftech Software	=						Logout
nin Dashboard				Prospects	5		
Chart Reports			Filter	Select	✓ Select	Sales Report	Employee Sales Report
Employee report							
Pending Records	Intrested (3)	Meeting Schedule (4)	Meedting Done (4)	Converted (1)	Lost (0)		
Filter Report			Vishakha Uday Kesarkar			•	
Non-family Report	Ruturaj Annasaheb Bhosale	Gayatri Abd Gavade	President and the second	Sourabh Sudhir Govekar			
Customer master <	bnosale		Calls :0 Whatsapp :0				
All Customer	Calls :1 Whatsapp :1	Calls :0 Whatsapp :0	← →	Calls :0 Whatsapp :0			
iser (Employee) Master < Add User	→	← →		← →			
Add User All Users		Shruti Pravin Kesarkar	Srushti Chandrashekhar Nagavekar				
Calls History	Sara Pravin Kesarkar						
Profile	Calls :0 Whatsapp :0	Calls:1Whatsapp:1	Calls :0 Whatsapp :0				
ad Customers	→	← →	← →				
ospect		Mar Caules Swash	Surgeril Abé Detil				
boarding	Mr. Prakash Ganapati	Mrs. Saylee Suyash Khatavkar	Swapnil Abf Patil				
Active	Mali		Calls : 1 Whatsapp : 1				
Department master <	Calls :1 Whatsapp :1	Calls :1 Whatsapp :1	← →				
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ervice master <		Mrs. Sunit Prakash Mali	Shubham Ravindra Patil				
Services			Calls :0 Whatsapp :0				
Sources master <		Calls :1 Whatsapp :1					

Prospect

Add New Task Concern Marci Say Parkin Maskin Concern Parkin Forderson Parkin							
Report Report Report Report Report Report Report Report Report Report Report Report Report Report Report Report Report Report Report Repo	Software Add New Task					×	Logout
Cellpoint Source: Andriff Massage 10 Not defaile 10 Not measure 10 Objourse report Interaction Interaction Not interaction Data Interaction Data Previous Interaction Datalis Interaction Interaction Data Interaction Data Interaction Data Contorner Not interaction Datalis Interaction Data Interaction Data Interaction Data Contorner Not interaction Datalis Interaction Data Interaction Data Output operation Data Contorner Not interaction Data Interaction Data Interaction Data Interaction Data Contorner Not interaction Data Interaction Data Interaction Data Output operation Data Contorner Not interaction Data Interaction Data Interaction Data Interaction Data Contorner Interaction Data Interaction Data Interaction Data Interaction Data Contorner Interaction Data Interaction Data Interaction Data Interaction Data Contorner Interaction Data Interaction Data Interaction Data Interaction Data Status Interaction Data Interaction Data Interaction D	Customer Name : Sara Pravin Kesarkar Company Name :Baghyalaxmi Constructions Curren	nt Status : Intre	sted call : 4	1561237898			
defactor refactor refac	Source : Amit Sir Executive : Saylee Knatavkar No of Calls : 0 No of messages : 0						Employee Sales Report
Analyse or mate oner mate Cohore Next interaction Mext interaction Date Iteraction Mext interaction Date Iteraction Date		Next Interac	tion Date				
Next interaction Customer Next interaction Details Uters Next interaction Details Uters Next interaction Data dd:mm-yyy -: dd:mm-yyy -: ters Satus customer intrested no<		Status	Interaction	Interaction Date		Interaction Date	
ustomer Engloyee) Matter Engloyee) Matter User MatterAction Details MatterAction Date MatterAction Date Imm-yyyy -: Immested Intrested No<	ster	Intrested	sample		sample		
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Next Interaction Date History dd-mm-yyyy -: Staus intrested intrested call Status valor valor <							
dd-mm-yyyy stomers Status Intrested Call Status ding No Whatsapp Message to Send Please Enter Message You want to send to customer Please Enter Message You want to send to customer							
stomers Intrested Intrested Call Status No Whatsapp Message to Send Please Enter Message You want to send to customer	dd-mm-yyyy: 🖻						
Intrested Call Status No Whatsapp Message to Send Please Enter Message You want to send to customer Attraction							
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nt master ent aster	No						
Please Enter Message You want to send to customer							
naster A	Please Enter Message You want to send to customer						
Close							
s master Close							
	Close					Save changes	

Prospect

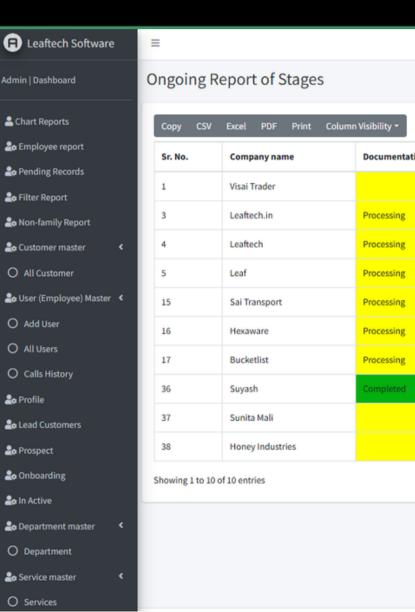
On Onboarding, after the customer is converted there is a process to join Documentation, KYC, CAN, Payezz, Instruction raised, Portfolio Creation.



Onboarding Leads

Select Select Select Select Onboarding Reports Status Reports Status Reports Status Reports Onboarding Reports Status Reports
Payezz (1) Instruction raised (1) Portfolio Creation(0) Vrushabh Vidhyadhar Birnale Siddhesh abv Kesarkar Siddhesh abv Kesarkar Status: Completed Sidtus: Processing Prev: 20-10-2023 Prev: 20-10-2023
(1) raised (1) Creation(0) Vrushabh Vidhyadhar Birnale Siddhesh abv Kesarkar Status: Completed Siddhesh abv Kesarkar Prev: 20-10-2023 Prev: 20-10-2023
Birnale Kesarkar Status: Completed Status: Processing Pres: 20-10-2023 Pres: 20-10-2023
Prev: 20-10-2023 Prev: 20-10-2023
Calls :0 Whatsapp :0 Calls :0 Whatsapp :0

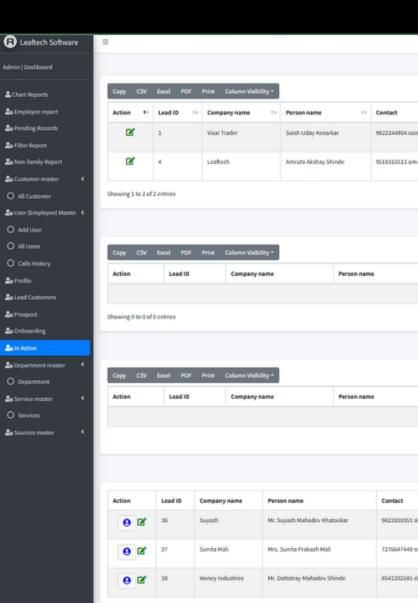
As the process starts with Documentation then it goes to KYC then it goes to CAN then it goes to Payezz, if there is instruction raised then the last process is Portfolio Creation.



Onboarding Leads

					Logout
					Search:
ion	кус	CAN	Payezz	Instruction raised	Portfolio Creation
	Processing				
		Pending			
	Processing				
			Completed		
				Processing	
	Completed	Completed	Completed		
					Previous 1 Next

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

				_			_		_						
															Logout
			Snooze l	Lead	ls										
													Sear	ech:	
	•• 5	Source ++	Executive	te La	Location		44	Add Date	14	Last inter	raction ++	Next Action	on 💠	FollowupCounts	14
aish@gmail.com	1	1	Saylee Khatavkar	R	At Pawashi Kudal Maharashtra	ra India 416416		01 10 2023		26 11 2023	3	25 11 2023	8	Whatsapp : 1 call : 3	
mruta@gmail.com	2	2	Saylee Khatavkar	N	At Kolhapur Kolhapur Maharashtra India 416005			01-10-2023	1	26 11 2023	3	26 11 2023	3	Whatsapp : 5 call : 2	
														Previous 1	Next
			Lost Le	ads	,										
													Sear	nch:	
Contact	Sc	iource	Executive		Location	Add Date	Last interaction Next Action				Followup	Counts			
			No data available	de in table											
														Previous	Next
		Ţ	Blocked	Lead	ds										
													Sea	arch:	
Contact	8	lource	Executive	Executive Location Add Da			Last in	teraction			Next Action		Followup	Paunts	
			No data available	de in table							The second se				
			110 0000 0000											Previous	Next
														FIGHUS	NES
		1	Inactive	Lead	ds										
		Source		Location						d Date	Last interact		Next Action	FollowupCounts	ł
skhatavkar@gmail.com		3	Sunita Mali	Plot no 23	3 sai colony Hu[ari Kolhapur I	Maharashtra India 416203			22.10	10 2023	28 11 2023	29	29 11 2023	Whatsapp:0 call:4	
smali@gmail.com		3	Sunita Mali	Plot No 3/	18 Shramik Society Kagal KOlt	hapur Maharashtra India 43	6216		22 10	10 2023	28 11 2023	25	29 11 2023	Whatsapp:3 call:3	

08 11 2023 28 11 2023

29 11 2023

Whatsapp:0 call:1

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

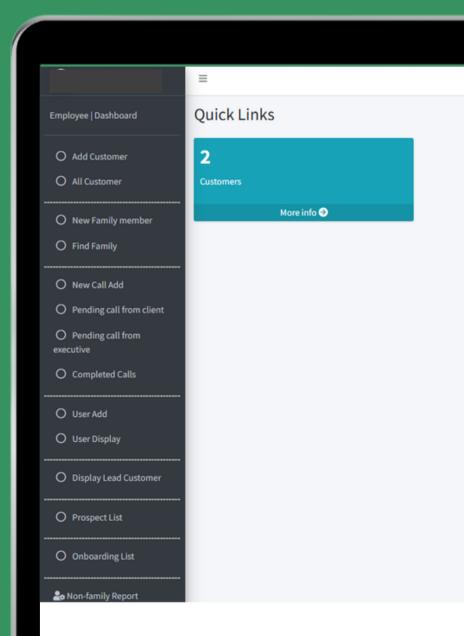
Leaftech Software	=
Admin Dashboard	Profile Details
🚢 Chart Reports	Username
🌲 Employee report	Superadmin
🏖 Pending Records	Email Id
🍰 Filter Report	abcd@gmail.com
🍰 Non-family Report	
🍰 Customer master 🛛 <	(Note : Fields with * are mandatory.)
O All Customer	Update
🍰 User (Employee) Master 🔇 <	
O Add User	
O All Users	
O Calls History	
a Profile	
Lead Customers	
arrospect	
🍰 Onboarding	
🍰 In Active	
🏖 Department master 🛛 <	
O Department	
🏖 Service master 🛛 <	
O Services	



Logout
Home / Profile
Password
123456
Mobile Number
1234567891

Dashboard Overview

- The Dashboard provides a snapshot of
- Customers
- **—** Employees
- Department
- Services



Employee Login

Logout	

Adding a New Customer: Navigate to the "Customers" section in the application. O Add C

O All Custo

O New Far

O Find Fam

O New Call

O Pending

O Pending executive

O Comple

O User Add

O Display

O Prospe

O Onboa

ano Non-fami

20 Filter Rep

Lo Employee

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.

=			Logou			
Add Customer details			Home / Custon			
Customer Type						
Select	~					
First Name	Middle Name		Last Name			
* Enter Name	* Enter Name		* Enter Name			
Email Id		Whatsapp Number				
* Email id		Whatsapp Number	\$			
Calling Number (Same as whatsapp number)		Minor/Non Minor				
Calling Number		Select	~			
Vision Money Mantra Email Id						
* Email id						
Proprietry firm name		firm Type				
Enter Firm name		Partnership Pvt. Ltd. HUF				
Department		PAN Number				
Select Department	~	Enter PAN number				
CAN Number						
Enter CAN number						
Taxation						
ITR Non Audit GST Return Regular ITR Audit Tax Audit GST R Wealth Management	eturn Composition					
Health Insurances Term Insurance Mutual Funds Portfolio audit						
General						
Permanant Address		Present Address (Same as Permanar	nt Address)			
Enter Permanant Address		Enter Present Address				



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.

	=												
hboard	All Custor	All Customers											
omer	Active Customer List												
mer		Search:											
ily member	User ID	Туре	Firm name	Full Name	Proprietry firm name	Email	Whatsapp No.	Calling No.	Pincode	Edit Profile	View Profile		
ily	2	Personal	Kunal	Kunal M Khsirsagar	abc	kunal@gmail.com	9658741230	9658741230	416003	٠.	θ		
Add	1	Personal	Sourabh Trader	sample sample sample	45	sample@gmail.com	8574125896	8574125896		2/	9		
all from client all from d Calls		Showing 1 to 2 of 2 entries Previous 1 Next De-active Customer list											
										Search:			
ıy	User ID	†∿ Туре	💠 firm name	💠 🛛 Full Name	** Proprietry firm name	↑↓ Email ↑	Whatsapp No.	↑↓ Calling	\o. ↔	Pincode	Action		
ad Customer					No da	ta available in table							
	Showing 0 to	Showing 0 to 0 of 0 entries											
List													
ing List													
- B List													
/ Report													



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.

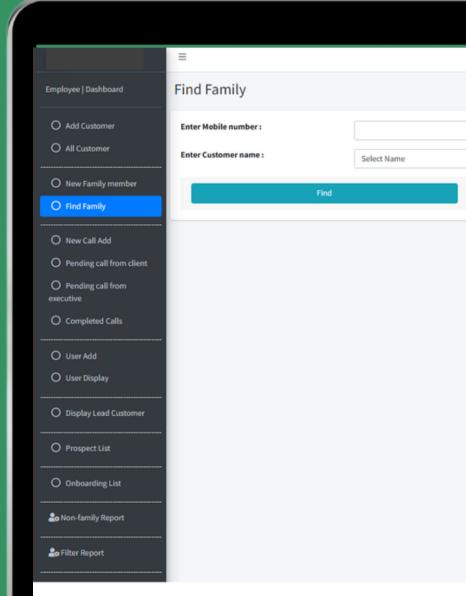
Click on a customer's name to access and edit their information.

	=
Employee Dashboard	Add User details
O Add Customer	Select Customer
O All Customer	Select
O New Family member	Select family member
O Find Family	Select a member
C Find Family	Relationship with person
O New Call Add	Select
O Pending call from client	Family Priority
O Pending call from executive	Select
O Completed Calls	(Note : Fields with * are mandatory.)
O User Add	Add Member
O User Display	
O Display Lead Customer	
O Prospect List	
O Onboarding List	
🍰 Non-family Report	
20 Filter Report	



Logout	
Home / User	
	•
	•
	•
	~

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





Logout

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

	=	Logout
ployee Dashboard	Add New Call Summery	Home / User
) Add Customer) All Customer	Date & Time 2023-12-16 05:41:45 pm	
)New Family member)Find Family	Select Customer Select Name Call Summery	
New Call Add Pending call from client Pending call from ecutive		
Completed Calls	Disposal status Select	Next Follow up date dd-mm-yyyy
) User Add		
) User Add) User Display	Select	
 Completed Calls User Add User Display Display Lead Customer Prospect List 	Select	
) User Add) User Display) Display Lead Customer	Select	
) User Add) User Display) Display Lead Customer) Prospect List	Select	

New Call

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

	=								Logout		
mployee Dashboard	Call Summery										
O Add Customer	Pending from Client										
O All Customer							Search:				
 New Family member Find Family 	Customer ID 💠	Client Name 💠	Гуре 💠	Contact 💠	Call Date 💠	Next Followup Date	lime 💠	Edit	*		
	No data available in table										
New Call Add Pending call from client	Showing 0 to 0 of 0 entries							Previous	Next		
O Pending call from executive	Escalation required										
O Completed Calls	Search:										
O User Add	Customer ID	Client Name	Туре	Contact	Call Date	Next Followup Date	Time	Edit			
O User Display	No data available in table										
O Display Lead Customer	Showing 0 to 0 of 0 entries							Previous	Next		
O Prospect List											
O Onboarding List											
♣ Non-family Report											
20 Filter Report											

Pending Call

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

=							Logout
Call Summery							
Pending from Executive							
						Search:	
Customer ID	Client Name	Туре	Contact	Call Date	Next Followup Date	Time	Edit
			No data ava	ilable in table			
Showing 0 to 0 of 0 entries							Previous Next
Escalation required							
						Search:	
Customer ID	Client Name	Туре	Contact	Call Date	Next Followup Date	Time	Edit
			No data ava	ilable in table			
Showing 0 to 0 of 0 entries							Previous Next
	Call Summery Pending from Executive Customer ID Showing 0 to 0 of 0 entries Escalation required Customer ID Customer ID	Call Summery Pending from Executive Customer ID Client Name Showing 0 to 0 of 0 entries Escalation required Customer ID Customer ID Client Name	Call Summery Pending from Executive Customer ID Client Name Type Showing 0 to 0 of 0 entries Escalation required Customer ID Client Name Type	Call Summery Pending from Executive Customer ID Client Name Type Contact Showing 0 to 0 of 0 entries No data ava Escalation required Image: Customer ID Client Name Type Contact Customer ID Client Name Type Contact Image: Customer ID No data ava	Call Summery Pending from Executive Customer ID Client Name Type Contact Call Date Kowing 0 to 0 of 0 entries Showing 0 to 0 of 0 entries Escalation required Customer ID Client Name Type Contact Call Date Modera available Type Contact Call Date No data available in table Type Contact Call Date	Call Summery Pending from Executive Customer ID Client Name Type Contact Call Date Next Followup Date No data available in table Showing 0 to 0 of 0 entries Escalation required Type Contact Call Date Next Followup Date Lot of 0 entries Customer ID Client Name Type Contact Call Date Next Followup Date Lot of 0 entries Customer ID Client Name Type Contact Call Date Next Followup Date Lot of data available in table	Search: Search: Customer ID Cilient Name Type Centact Call Date Next Followup Date Showing 0 to 0 of 0 entriles Showing 0 to 0 of 0 entriles Escalation required Stowing 0 to 0 of 0 entriles Stowin

Pending Call From Executive

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

	=		
	Complete Call S	Summery	
	Customer ID	Client Name	Туре
ber	3	Kunal M Khsirsagar	Personal
	2	Kunal M Khsirsagar	Personal
	1	Kunal M Khsirsagar	Personal
n client	Showing 1 to 3 of 3 entrie	25	
tomor			
tomer			

Employee | Dashbe

O Add Customer

O All Customer

O New Family m

O Find Family

New Call Add
 Pending call fro
 Pending call fro

O Completed

O User Add

O Display Lead C

O Prospect List

O Onboarding L

ano Non-family Report

Lo Filter Report

Completed Call

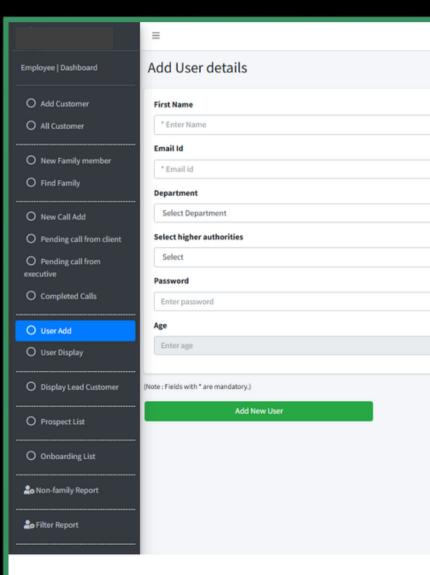
Logout				
Home / All Users				
Search:				
Contact	Date	Time	Details View	
Whatsapp - 9658741230 , Calling - 9658741230	20-10-2023	16:17:07	8	
Whatsapp - 9658741230 , Calling - 9658741230	20-10-2023	16:15:52	8	
Whatsapp - 9658741230 , Calling - 9658741230	03-10-2023	17:00:59	8	
			Previous 1 Next	
	Whatsapp - 9658741230 , Calling - 9658741230 Whatsapp - 9658741230 , Calling - 9658741230	Whatsapp - 9658741230 , Calling - 9658741230 20-10-2023 Whatsapp - 9658741230 , Calling - 9658741230 20-10-2023	Contact Date Time Whatsapp - 9658741230, Calling - 9658741230 20-10-2023 16:17:07 Whatsapp - 9658741230, Calling - 9658741230 20-10-2023 16:15:52	Kome / All Users Secure Secure Kotact Date Time Detais View Whatsapp - 9658741230, Calling - 9658741230 20-10-2023 16:17:07 Image: Calling - 96:06:00 Whatsapp - 9658741230, Calling - 96:06:741230 03-10-2023 16:15:52 Image: Calling - 96:06:00 Whatsapp - 96:06:741230, Calling - 96:06:741230 03-10-2023 17:00:59 Image: Calling - 96:06:00

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.



User

	Logout
	Home / User
	Last Name
	* Enter Name
	Mobile Number
	Mobile Number
	Select designation
*	Select 🗸
	Username
*	Enter username
	Date of Birth
	dd-mm-yyyy
	Gender
	Select 🗸

1. Accessing User List:

- Navigate to the "Users" 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:

- Utilize filtering options to streamline your view based on user status, alphabetical order, or other criteria.
- Experiment with sorting options to organize the list as per your preference.
- 4. Editing user Information:
 - To update user details, click the "Edit" button on the usrs profile.
 - Input the necessary changes and save the updated information.
- 5. Exporting, Updating and Deleting : Exporting list in CSV, Excel, PDF, Print.

	≡	
Employee Dashboard	All Users	
O Add Customer	Active User Lis	t
O All Customer		
O New Family member	User ID	Full Name
Find Family	23	Sunita Mali 🔒
 New Call Add Pending call from client 	22	Shubham Mali 🛔
Pending call from executive	20	Akshay Shinde 🔒
O Completed Calls	18	Ruturaj bhosale 🔓
O User Add	13	Kalpana Joshi 🔒
O User Display	12	Rupali Patil
O Display Lead Customer	п	Nikita Patravale
O Prospect List	10	Shweta Patgaonkar
O Onboarding List	9	Poonam Mane
Lo Non-family Report	5	Renu Patil 🚨
	Showing 1 to 10 of	f 12 entries

User

					Logou
					Home / All Us
				Search:	
Email	Contact	Deaprtment	Username	Action	
abcd@1234	7894561231	Wealth Management	Sunita	Ø	٥
abcd@1234	7894561231	Wealth Management	Shubham	Ø	٠
abcd@1234	7894561231	Taxation	akshayShinde	ß	٥
abcd@1234	7894561231	Wealth Management	Ruturaj	ß	۰
abcd@1234	7894561231	Wealth Management	Kalpana	Ø	٠
abcd@1234	7894561231	Wealth Management	Rupali	ß	۰
abcd@1234	7894561231	Wealth Management	Nikita	ß	٠
abcd@1234	7894561231	Wealth Management	Shweta	ľ	•
abcd@1234	7894561231	Wealth Management	Poonam	ľ	٠
abcd@1234	7894561231	Wealth Management	Renu	ľ	•
				Previous	1 2 Next

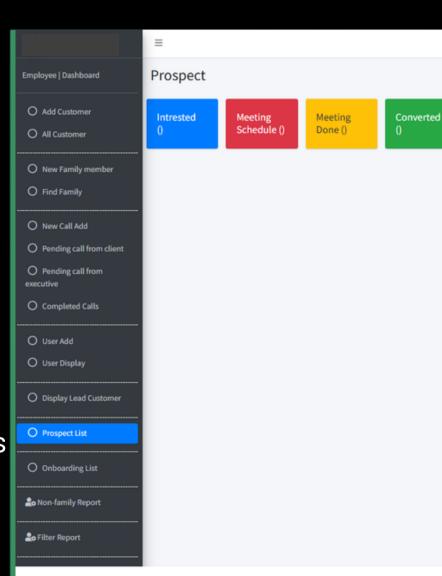
Viewing Lead Customer Report

= Leads O Add Customer Company name Lead ID Action Person name O New Family member Showing 0 to 0 of 0 entries O New Call Add O Pending call from client O Pending call from O Completed Calls O User Display O Display Lead Custom O Prospect List O Onboarding List a Non-family Report a Filter Report



Logout									
ł	Add Leads CSV Upload	This Month	July, 2023						
Search:									
	FollowupCounts	Next Action	Last interaction	Add Date	Location	Executive	Source	Contact	
	No data available in table								
	Previous Next								

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 \setminus 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

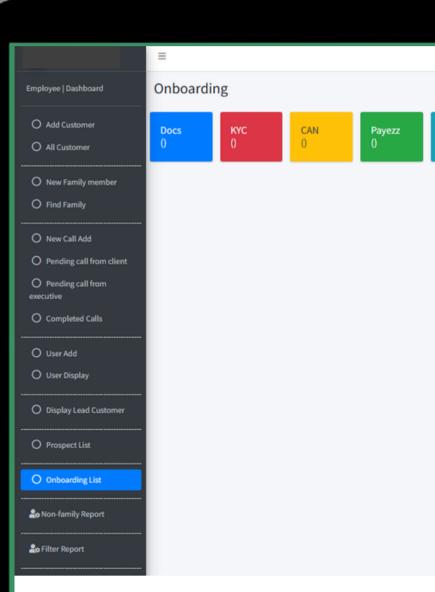


Prospect

	Logout
	Sales Report Add Prospect Employee Sales Report
Lost 0	

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

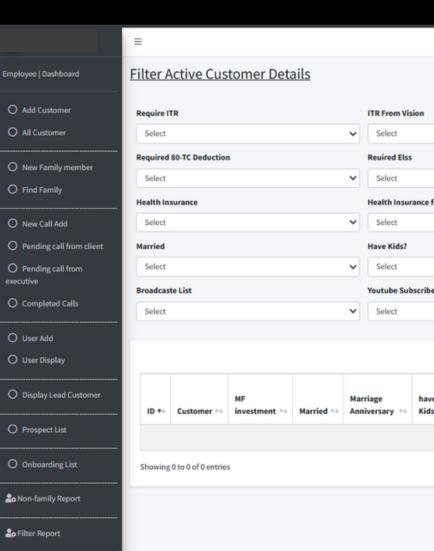
Portfolio Creation.



Onboarding

		Logout
	Onboarding Reports	Status Reports
Portfolio Creation()		

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 Report

Logout

Filter De-active Customer Details

n	Require GST						GST From Vision								
				✓ Sele	ect				~	Select					~
	Term Insurance				Term Insurance from vision										
	✓ Select				~	Select					~				
nce from vision Demat A/C Demat from Vision															
~				✓ Sele	ct				~	Se	lect				~
	Mutual fund from vision						What	tsapp grp							
	✓ Select ✓				~	Se	lect				~				
cribe				✓ Subr	mit										
												Search:			
have Kids ↔	No. of Kids ↔	Kid 1 Name 💠	Kid 1 DOB ↔	Kid 2 Name 💠	Kid 2 DOB ↑↓	Kid 3 Name 💠	Kid 3 DOB ↑↓	About Your Work ↔	Type of busines		Kind of Profession ↔	Job Industry ∾	File ITR ↔	ITR from vision	6
			No data	available in	table										
													Previo	ous Next	:

Viewing Employee Report from Certain time period by using date form

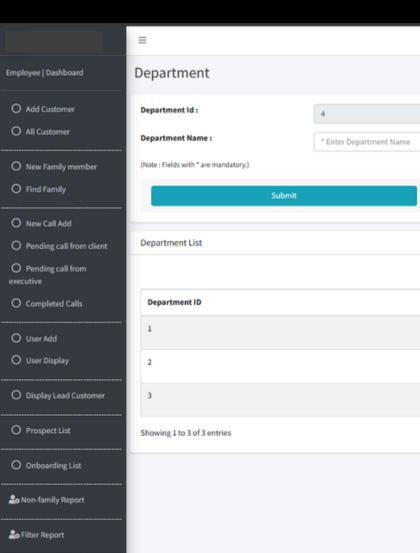
Exporting, Updating and Deleting : Exporting list in CSV, Excel, PDF, Print.

	=							Logout
nployee Dashboard	Employee	Report						
) Add Customer	From :		dd-mm-yyyy		To :	dd-mm-yyyy		
All Customer			Search					
New Family member	_							
Find Family	From : 202	3-01-16 To: 2023-	12-16					
New Call Add							Search:	
Pending call from client	Sr. No.	Employee	No. Fileds Updated	No. of calls	Pending from Client	Pending from Executive	Escalation Required	Completed
Pending call from itive	1	Saylee Khatavkar	4	1	0	0	0	3
Completed Calls	Showing 1 to 1	of 1 entries						Previous 1 Next
User Add								
User Display								
Display Lead Customer								
Display Lead Customer Prospect List								
User Display Display Lead Customer Prospect List Onboarding List Non-family Report								

Employee Report

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

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

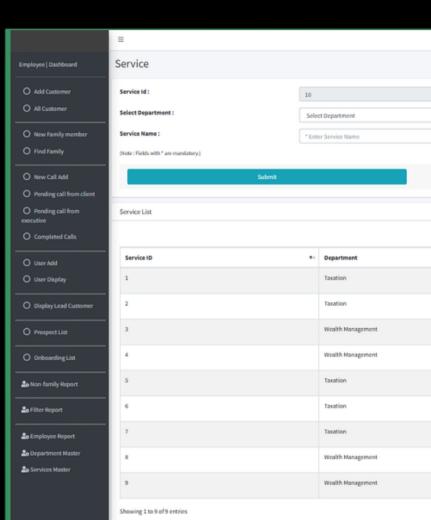




				Logo	ut
			Search:		
↑ ↓	Department Name	₩	Edit	•	-
	Taxation		Edit		
	Wealth Management		Edit		
	General		Edit		
				Previous 1 Next	

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

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





				Logout
	~			
			Search	
**	Service Name	14	Edit	++
	ITR Non Audit		Edit	
	GST Return Regular		Edit	
			_	
	Health Insurances		Edit	
	Term Insurance		Edit	
	ITR Audit		Edit	
	Tax Audit		Edit	
	GST Return Composition		Edit	
	Mutual Funds		=	
			Edit	
	Portfolio audit		Edit	
			Previous 1	-

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Ethical and transparent transactions

One point communication

24/7 support for maintenance

FESTIMONIAL 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.





<u>Sales and</u> <u>Distribution E.R.P.</u>

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

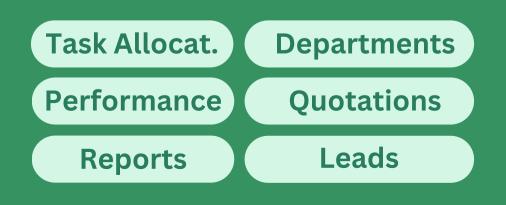


FESTIMONIAL Future of Software Solutions with LeafTech



Task Management

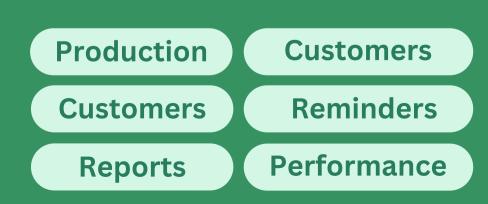
it's a tool that helps you regain control of your tasks and be more productive. Here's why LeafTech is the ideal choice for your task





Manufacturing E.R.P.

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





Appointment Management

we understand the significance of seamless appointment management in today's fastpaced world.



Future of Software Solutions with LeafTech

WEBSITE DEVELOPMENT	SOFTWARE DEVELOPMENT	MOBILE APPLICATIONS DEVELOPMENT	BRANDING SOLUTIONS	VIDEO MAKING & PHOTOGRAPHY	DIGITAL MARKETING
1. Static 2. Dynamic 3. E-Commerce 4. Online ERP 5. CRM 6. CMS	 Network Stand Alone ERP Custmised Electronic Device Interface 	1. Android 2. IOS 3. Windows 4. Hybrid 5. Web U Interface	 Logo Presnetation Stationary Clothing Email Designs 	 Short Films Presentation Candid Photo. Product Photo. Factory Photo. WildLife Photo. 	 Social Media Email SMS SEO Content Designs

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.

