



How To
Generate Lead



Online

PIYUSH CHHAGANBHAI KALS

Last Login: 07-09-2023 11:43 AM

🔍 Search in menu...

- 🏠 Dashboard
- 📁 Download Section
- 👤 Organization
- 👥 Customer
- 🏢 Company
- 📅 Tasks
- 🖋️ Digital Signature
- 💰 Expense
- 📦 Items
- 🛒 Sales
- 🛒 Purchase
- 🏦 Auto Bank Reconciliation (ABR)
- ⚖️ Company Law
- 🤖 Robot
- 👤 Human Resource

Human Resource

Departments

Departments

Announcement

Announcement

Users

User

Apply & Track Your Leave

Leave Management

Marketing & Lead

Leads

You Can Also Make
Generate a Lead From
Quick Generate Option As Well

⬅️ Clock Out

Step 1

To generate a Lead You've
To "Select" the same Tab in
'Human Resource' By Following Diagram

Click On The Human Resource Module & Click On Leads



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- Human Resource

Leads

Thursday 7th September - 2023, Time 1:40:59 PM

Clock Out

Filter

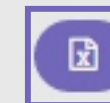
Batch Action

Select Organization

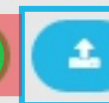
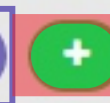
Select State

Select City

Switch to KANBAN



Export



Import

All Leads

Show 10 entries

Search:

	Lead No	Title	Contact name	Organization Name	Email	Mobile	Last Contact	Last Message	Tags
	LEAD51016	COMPANY LAW	Motilal & Associates	DEEPAK A. VARIYA & CO.	cahariagarwal007@gmail.com		2023	Test Call Summary	PCS
	LEAD51017	COMPANY LAW	KKRK & CO	DEEPAK A. VARIYA & CO.	kkrkandco@gmail.com	9137407535	Add	Add	
	LEAD51018	COMPANY LAW	URVI GANDHI & ASSOCIATES	DEEPAK A. VARIYA & CO.	URVI.GANDHI@GMAIL.COM			Add	
	LEAD51019	COMPANY LAW	R A RAJPUT & CO	DEEPAK A. VARIYA & CO.	rajputr2004@gmail.com	9821320521	Add	Add	
	LEAD51020	COMPANY LAW	M. S. KULKARNI & ASSOCIATES	DEEPAK A. VARIYA & CO.	msk.associates87@gmail.com	9820050424	Add	Add	
	LEAD51021	COMPANY LAW	Rakesh kanthawala and co	DEEPAK A. VARIYA & CO.	rakeshca480@gmail.com	8208468704	Add	Add	VIP
	LEAD51022	COMPANY LAW	R S Sawale And Co	DEEPAK A. VARIYA & CO.	rsawale1@gmail.com	02225330350	Add	Add	VIP
	LEAD51023	COMPANY LAW	A P Mishra & Associates	DEEPAK A. VARIYA & CO.	ca.ashishpmishra@gmail.com	8691832155	Add	Add	

Step 2

NOW "CLICK" ON THE
+ BUTTON SHOWN YOU
IN THE DIAGRAMYou can also add data
by Importing Excel Sheet



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Communication

**Now Fill the Mandatory Fields
& Submit The Form By “clicking”
Submit Button**

Thursday 7th September - 2023, Time 1:41:50 PM

[← Clock Out](#)

New Leads

COMPANY LAW

Leads Status	Interested
--------------	------------

DEEPAK A. VARIYA & CO.

Lead Source	CA Client
-------------	-----------

Motilal & Associates

Email *

+919322373977

Mobile* +9987365384

India

Zip code

Maharashtra

Address	THANE
---------	-------

Mumbai

English

Twitter URL

Facebook URL

You Just Have To pick a date from the calendar It'll Automatic reflect in the column 

Tags *

Short Note

Here You can Write The Description Or Note.

Assigned To  Everyone?

← This Permission Allow / Restrict As Per Selection

← This Perm
Customize Permission?

After Completing The Form Press On Updates Button

Updates

Cancel



Online

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-  Dashboard
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-  Digital Signature
-  Expense
-  Items
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-  Auto Bank Reconciliation (ABR)
-  Company Law
-  Robot
-  Human Resource

Leads

Thursday 7th September - 2023, Time 1:47:45 PM

[← Clock Out](#)

Filter

Batch Action

Select Organization

Select State

Select City

Switch to KANBAN



All Leads



Show 10 entries

Search:

	Lead No	Title	Contact name	Organization Name	Email	Phone	Mobile	Last Contact	Last Message	Tags
	LEAD51016	COMPANY LAW	Motilal & Associates	DEEPAK A. VARIYA & CO.	cdhagpradhi@gmail.com	9820000000	9820000000	11-07-2023 12:19:00	Test Call Summary	PCS
Source	CA Client									
Status	Interested 									
Action	   									
	LEAD51017	COMPANY LAW	DEEPAK A. VARIYA & CO.	DEEPAK A. VARIYA & CO.	cdhagpradhi@gmail.com	9820000000	9820000000		Add	Add
	LEAD51018	COMPANY LAW	URVI GANDHI & ASSOCIATES	DEEPAK A. VARIYA & CO.	cdhagpradhi@gmail.com	9820000000	9820000000		Add	Add
	LEAD51019	COMPANY LAW	R A RAJPUT & CO	DEEPAK A. VARIYA & CO.	cdhagpradhi@gmail.com	9820000000	9820000000		Add	Add
	LEAD51020	COMPANY LAW	M. S. KULKARNI & ASSOCIATES	DEEPAK A. VARIYA & CO.	cdhagpradhi@gmail.com	9820000000	9820000000		Add	Add
	LEAD51021	COMPANY LAW	Rakesh kanthawala and co	DEEPAK A. VARIYA & CO.	cdhagpradhi@gmail.com	9820000000	9820000000		Add	Add VIP

You Get Many Action Here
Edit, Delete, Download & Whats App.

Great.. You've Successfully Completed The Session See You In Next Slide..