



# Sales CRM

## Sales CRM Splash Screen





Username

Password

**SIGN IN**

**SYNTEL**  
Consider IT Done

# Sales CRM Login Screen



**ADITYA SAXENA**

Practice Director  
ESG Mobility

50%



LEADS



CONTACTS



ACCOUNTS



TASKS



OPPORTUNITIES



SETTINGS

# Sales CRM Left Menu Slider

## LEADS

16

Recent

04

Hot

20

This Month

## OPPORTUNITIES

06

Recent

03

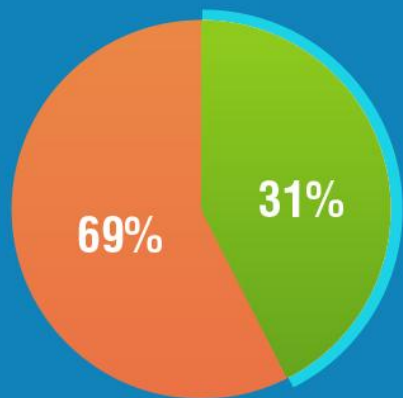
Hot

09

This Month

## ACHIEVEMENT

## TASKS



March 2015

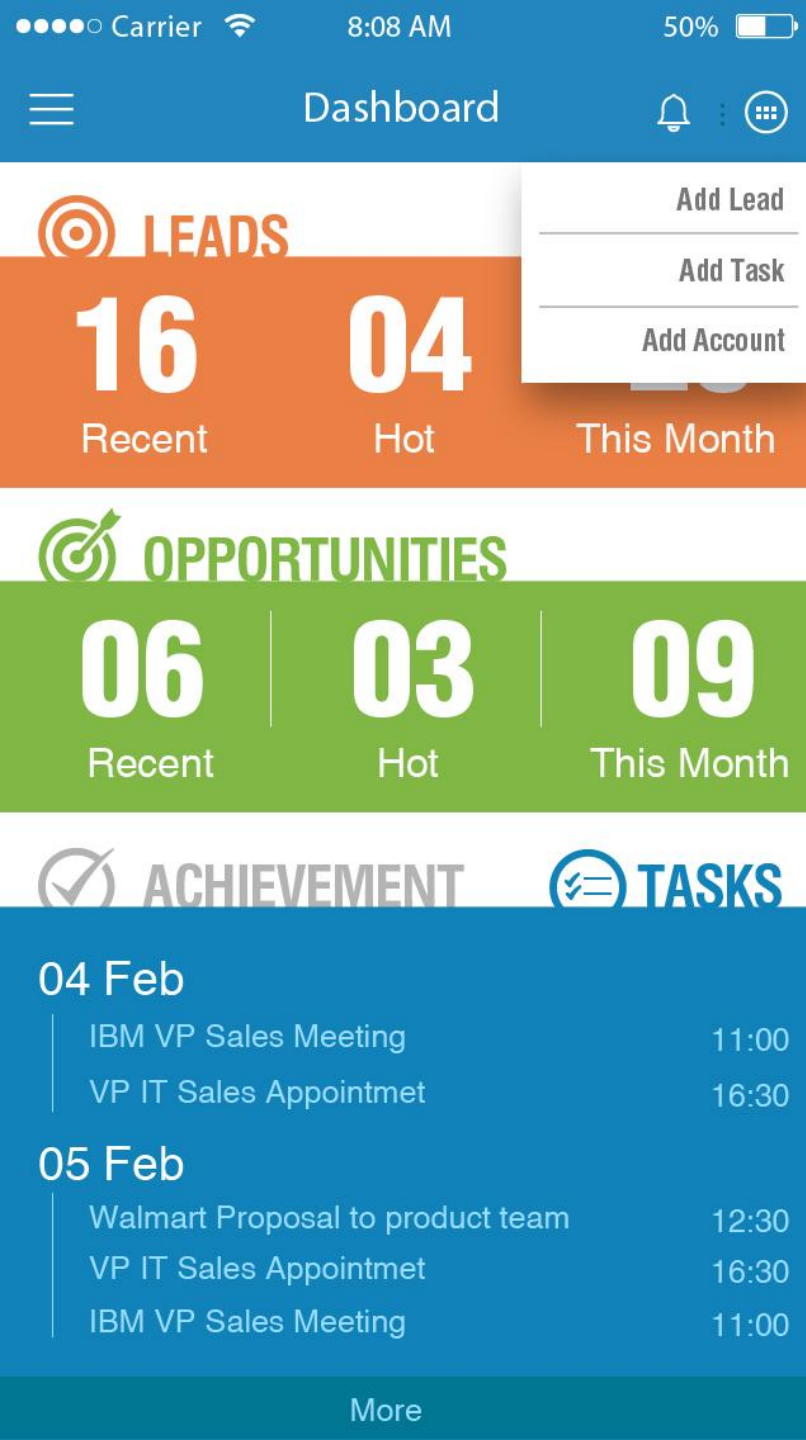
You have achieved

31%

OPPORTUNITIES

Leads Opportunities

# Sales CRM Dashboard



# Sales CRM Dashboard- Quick Menu

Lead

Personal Information



Company Name

Name

Designation

Account Name

Department

Contact Information

Email

Contact No.

Website

Address

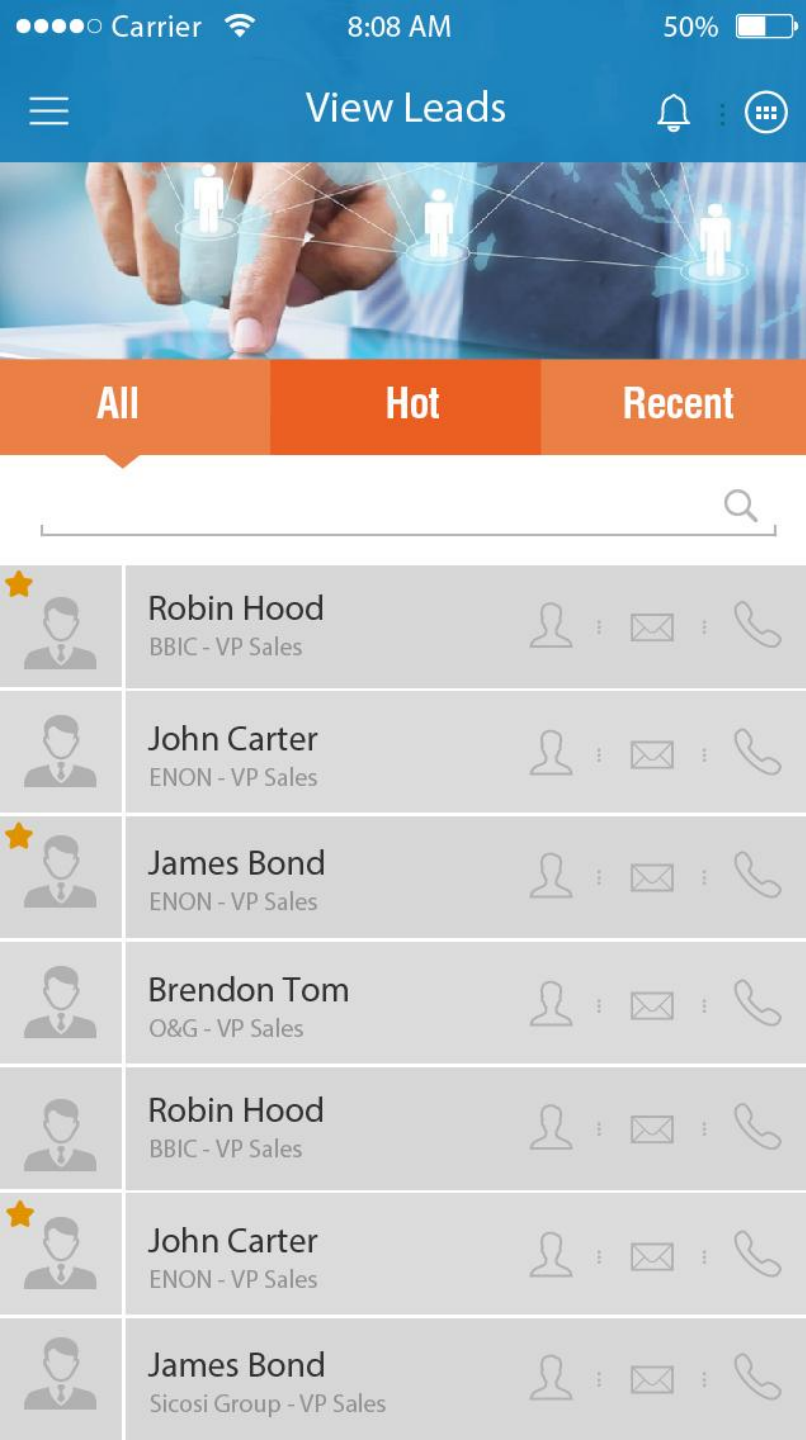
Lead Information

Lead Source

Lead Status

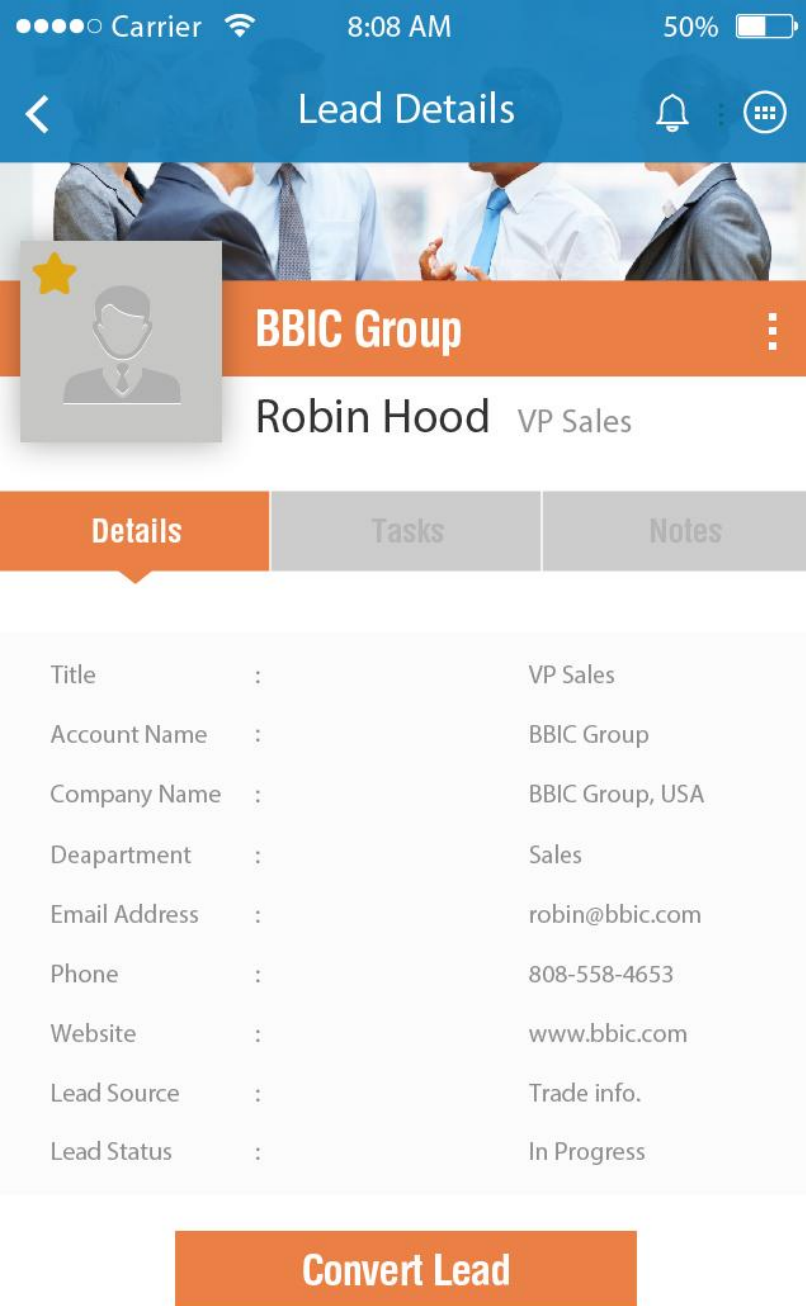
Notes

Create New Lead

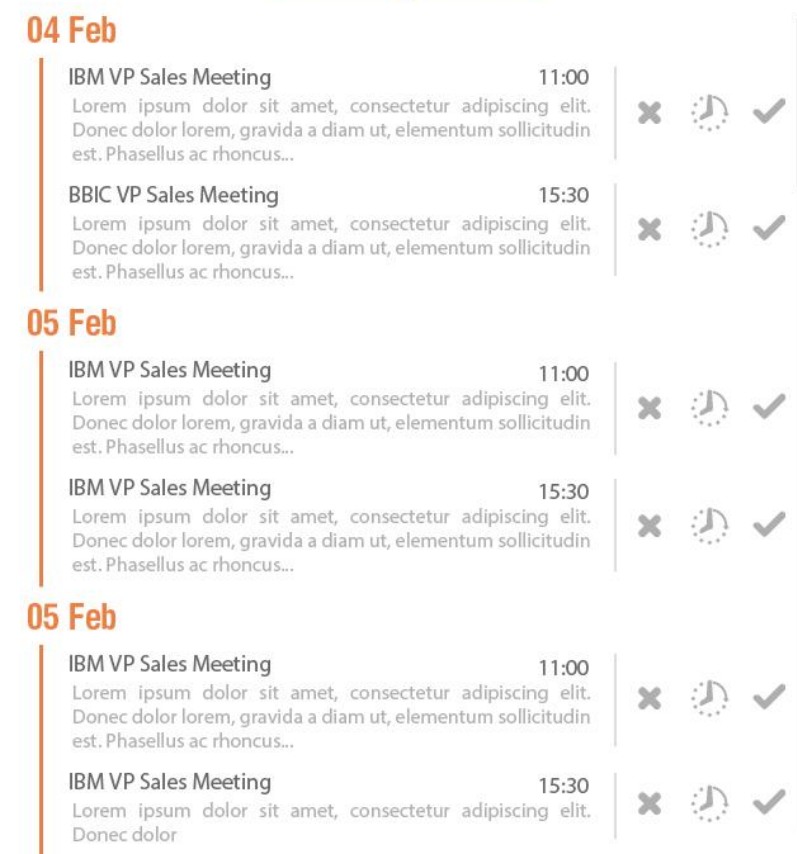


# View Lead Screen

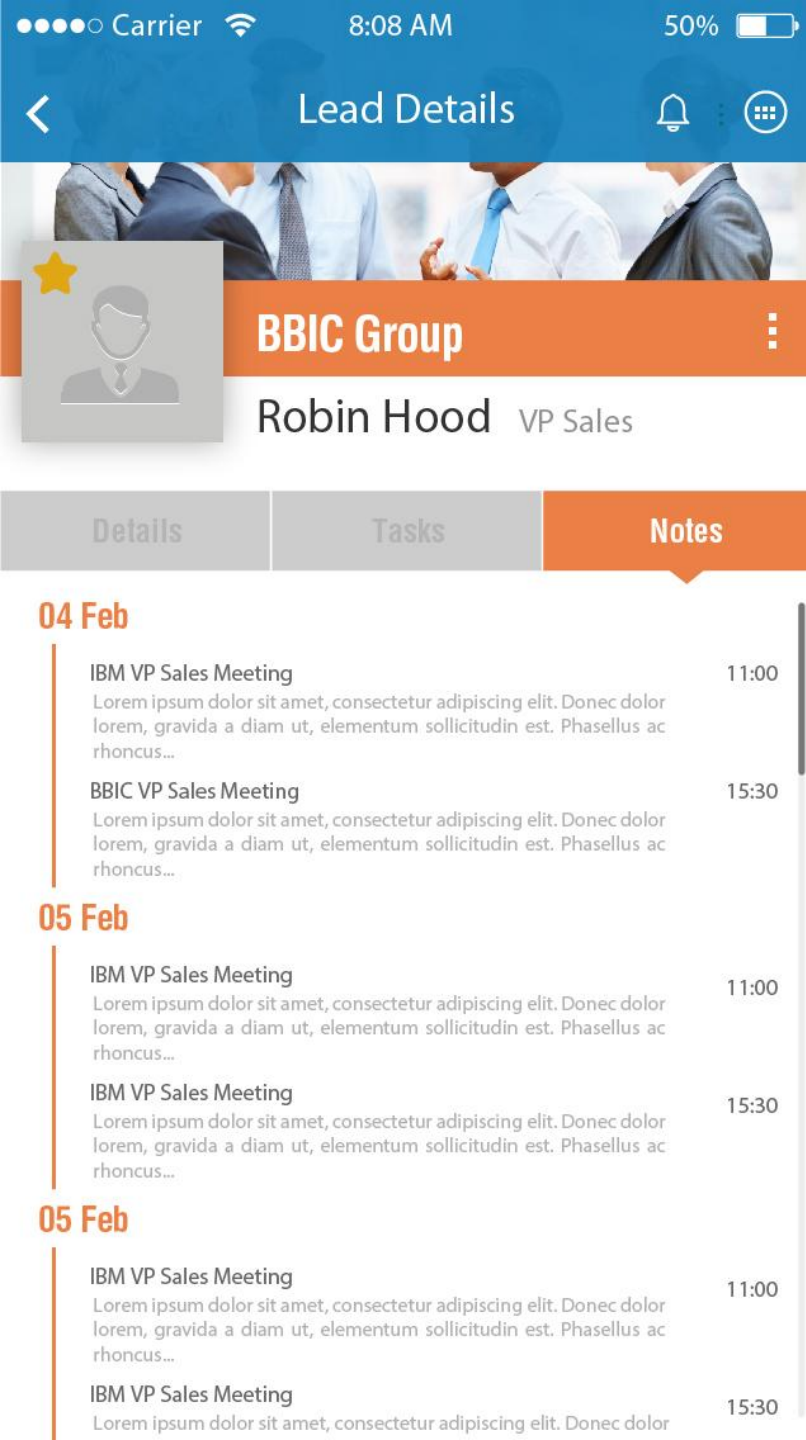




# Lead Detail Screen



Lead- Task Screen



## Lead Notes Screen

Personal Information

BBIC Group, USA

Robin Hood

VP Sales

BBIC Group, USA

BBIC - Sales

Contact Information

robin\_hood@bbic.com

650-9088-4839

www. bbic.com

Address

Lead Information

Lead Source

Lead Status

Notes

Cancel

Update

Edit Lead

Account

Account Information

Account Name

Account Owner

Type

Industry

Description

Contact Information

Email

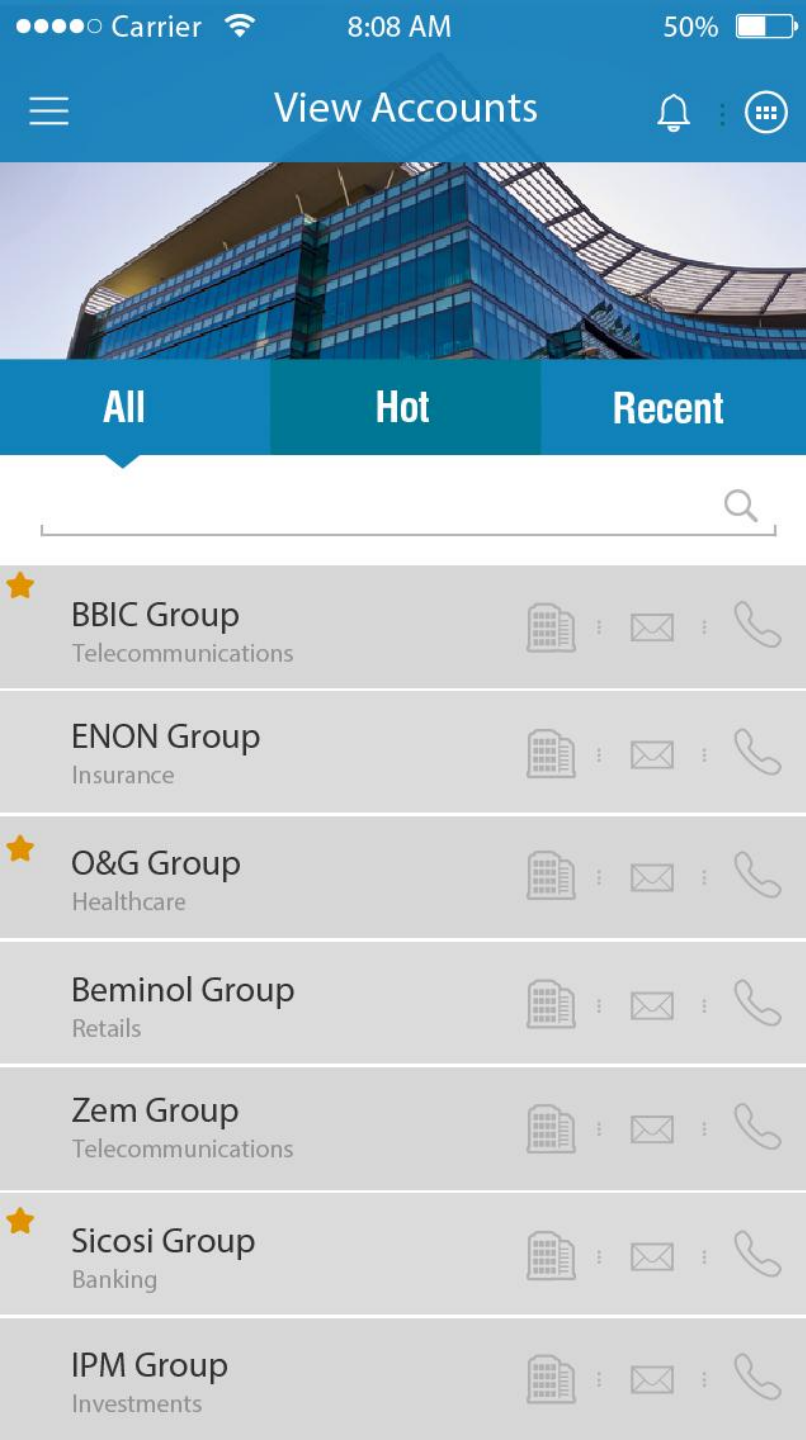
Contact No.

Website

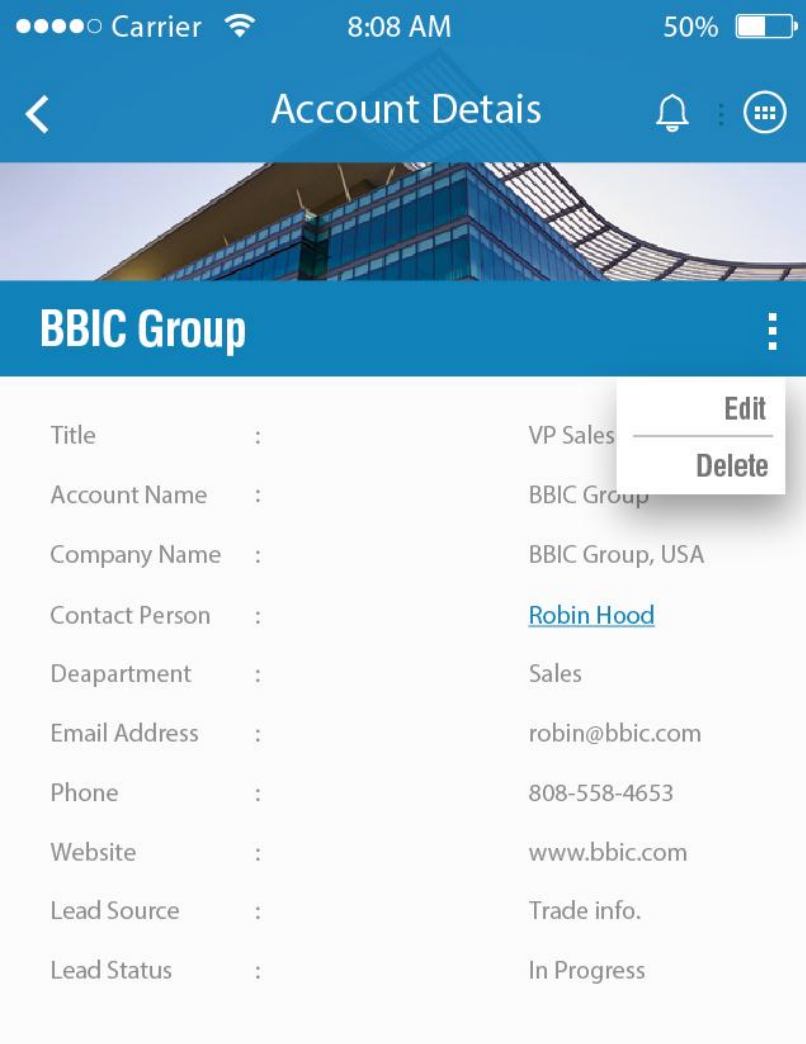
Address

Notes

Create New Account



# View Accounts List Screen



## Account Detail Screen



Account Information

BBIC Group

Robine Hood

Lead

Telecommunication

Description

Contact Information

robin\_hood@bbic.com

650-502-5145 www.bbic.com

Address

Notes

View Account  
Screen

# Contacts

Personal Information



Company Name

Name

Designation

Account Name

Department

Contact Information

Email

Contact No. Website

Address

# New Contacts Screen

Cancel














































Create



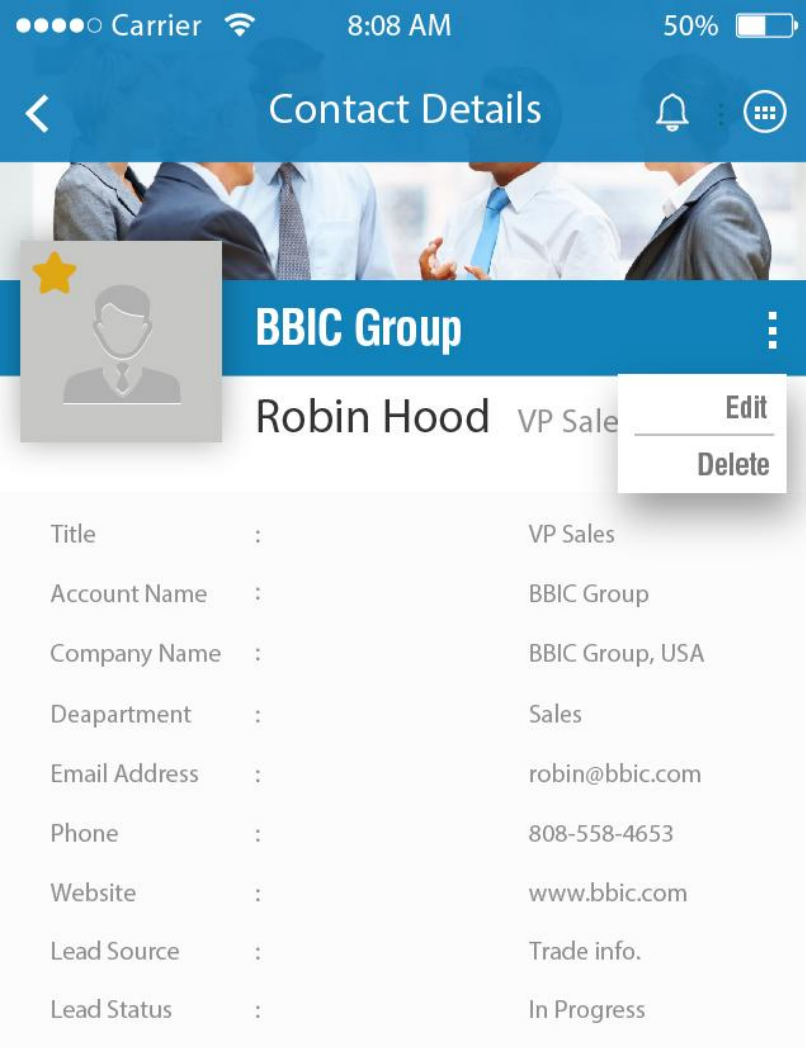
All

Recent



 	<b>Robin Hood</b> BBIC - VP Sales	    
	<b>John Carter</b> ENON - VP Sales	    
 	<b>James Bond</b> ENON - VP Sales	    
	<b>Brendon Tom</b> O&G - VP Sales	    
	<b>Robin Hood</b> BBIC - VP Sales	    
 	<b>John Carter</b> ENON - VP Sales	    
	<b>James Bond</b> ENON - VP Sales	    

# View Contacts



# Contact Detail Screen

**TASK**

Task Information

Task Name

Subject

Start Date & Time

Due Date & Time

Status

NewIn ProgressNot AssignedCompleted

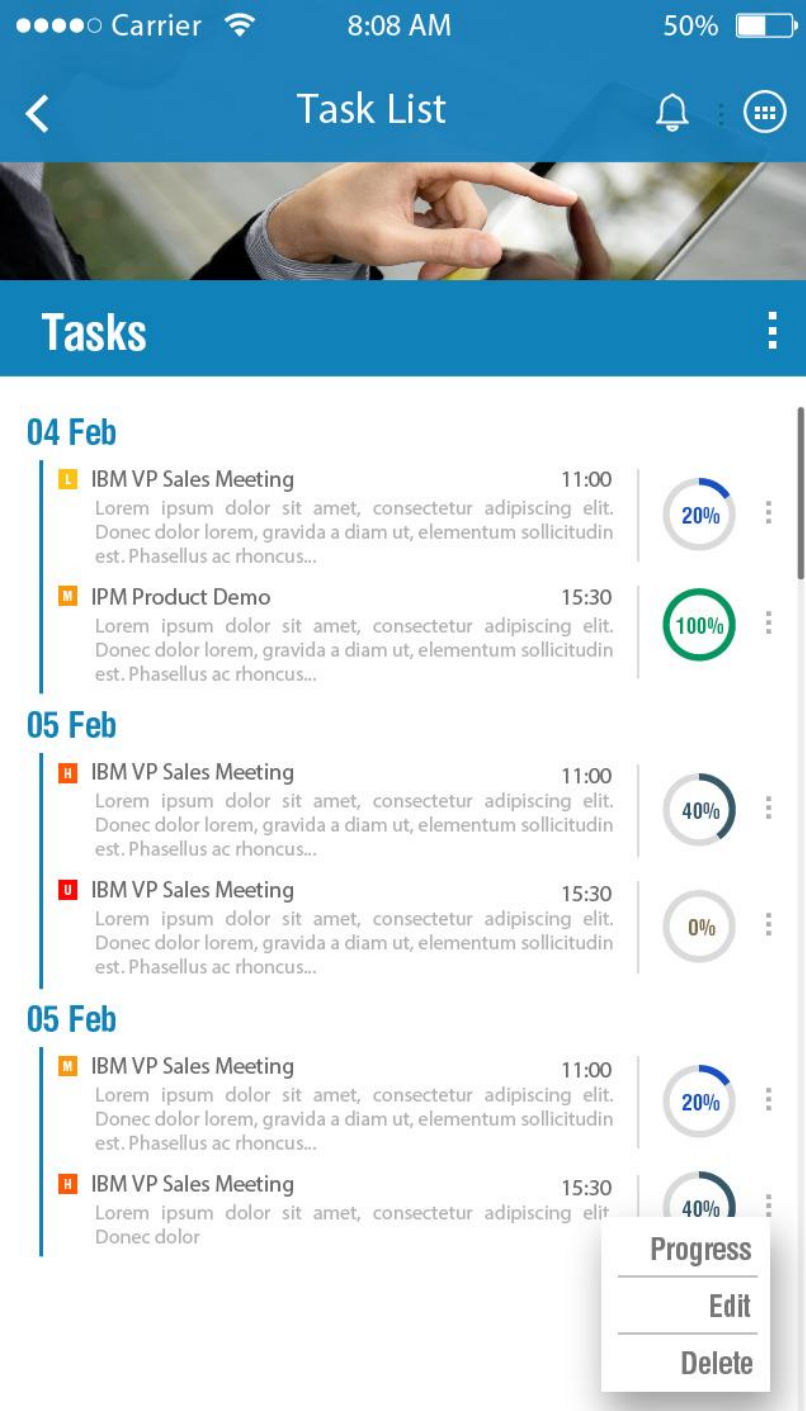
Priority

LowMediumHighUrgent

Comments

Set Reminder

Create New Task



# Task List Screen





## Tasks



04 Feb

**IBM VP Sales Meeting** 11:00  
Lorem ipsum dolor sit amet, consectetur adipiscing elit.  
Donec dolor lorem, gravida a diam ut, elementum sollicitudin  
est. Phasellus ac rhoncus...



**IPM Product Demo** 15:30  
Lorem ipsum dolor sit amet, consectetur adipiscing elit.



### Progress



Donec dolor lorem, gravida a diam ut, elementum sollicitudin  
est. Phasellus ac rhoncus...

**IBM VP Sales Meeting** 15:30  
Lorem ipsum dolor sit amet, consectetur adipiscing elit.  
Donec dolor lorem, gravida a diam ut, elementum sollicitudin  
est. Phasellus ac rhoncus...



05 Feb

**IBM VP Sales Meeting** 11:00  
Lorem ipsum dolor sit amet, consectetur adipiscing elit.  
Donec dolor lorem, gravida a diam ut, elementum sollicitudin  
est. Phasellus ac rhoncus...



**IBM VP Sales Meeting** 15:30  
Lorem ipsum dolor sit amet, consectetur adipiscing elit.  
Donec dolor



# Task Progress

## Task Information

Meeting with IPM VP Sales

New mobile app

More

Due

Set Date & Time

Mon, April 06, 2015 19:37

+	+	+	+	+
06	Apr	2015	19	37
-	-	-	-	-

Set Clear

Status

New In Progress Not Assigned Completed

Priority

Low Medium High Urgent

## Comments

Set Reminder



Cancel Create

# Task Screen -Setting Reminder

OPPORTUNITY

Opportunity Detail

Opportunity Name

Opportunity Owner

Account Name

Close Date

Type

Stage

Probability (%)

Amount

Additional Information

Next Step

Lead Source

Created By





Description

Create  
Opportunity



All

Recent

 <b>BBIC</b> Marketing <a href="#">Robin Hood</a>	\$140,000.00 Need Estimate Due: May, 2016	80% Prospecting
 <b>ENON Group</b> Mobile App. <a href="#">John Carter</a>	\$10,48,000.00 Need Estimate Due: Dec, 2016	60% Need Analysis
 <b>O&amp;G Group</b> Software Solution <a href="#">Brendon Tom</a>	\$440,000.00 Need Estimate Due: Feb, 2016	55% Value Proposition
 <b>Sicosi Group</b> Mobile App. <a href="#">James Bond</a>	\$13,40,000.00 Negotiation/Review Due: Jan, 2017	70% Close the deal!

# View Opportunity