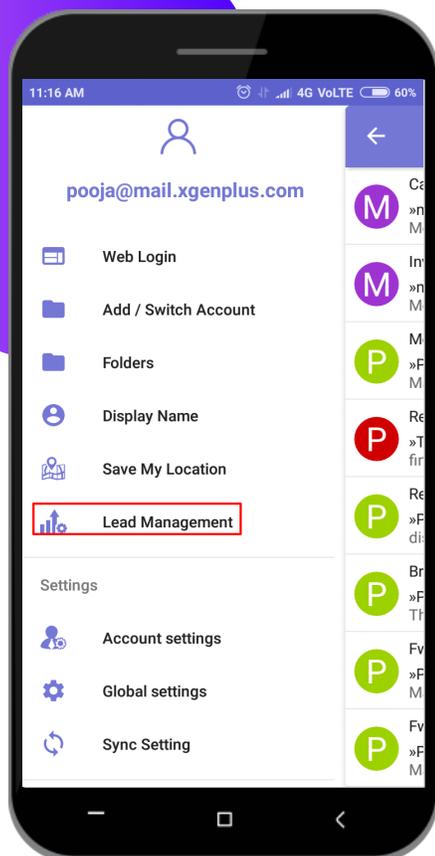# LEAD MANAGEMENT

## Effective Solution for Sales Activities

Xgen Lead Management is specially designed for the Sales Team that helps team in Adding, tracking and nurturing sales leads. In this activity the team lead also gets the opportunity to see the lead status of his team member so that he can intervene as and when required.

Steps to Access
Lead Management

- **Login Xgen Mail Mobile App**
- **Go to Menu Option**

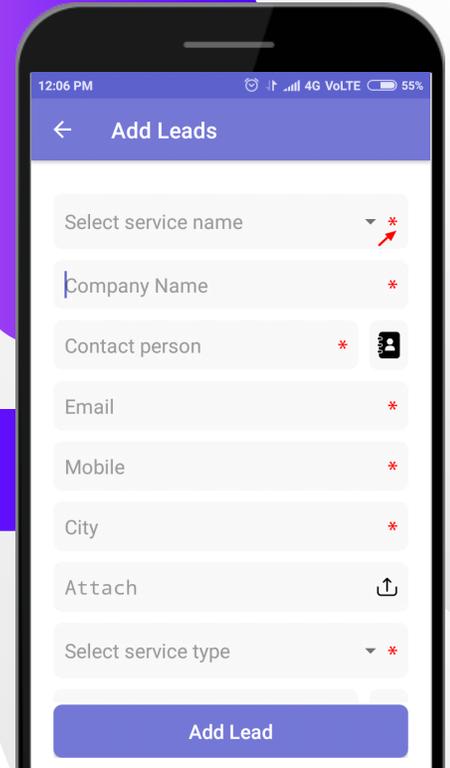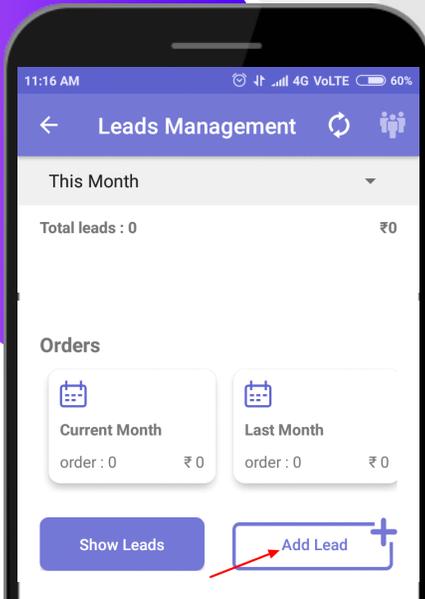Click on the Lead Management option to land on Lead Management Dashboard.
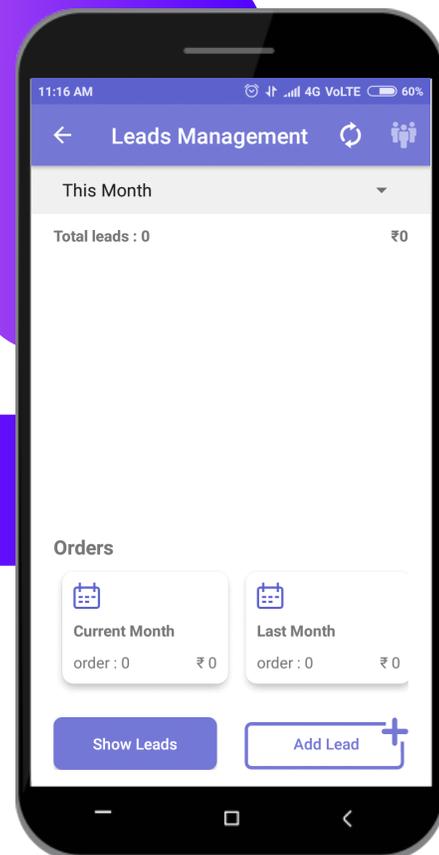
This is the dashboard for Lead Management from where a user can keep track of the leads generated. This page will further help him to view his progress on a single page.
The options available are:

- **Data Synchronization-** Data Sync option allows user to synchronize data or file for any update.
- **Team Lead-** Team lead option will allow the leader to view his team's data if enabled by admin.
- **Show Leads-** Here user can see all leads generated in detail.
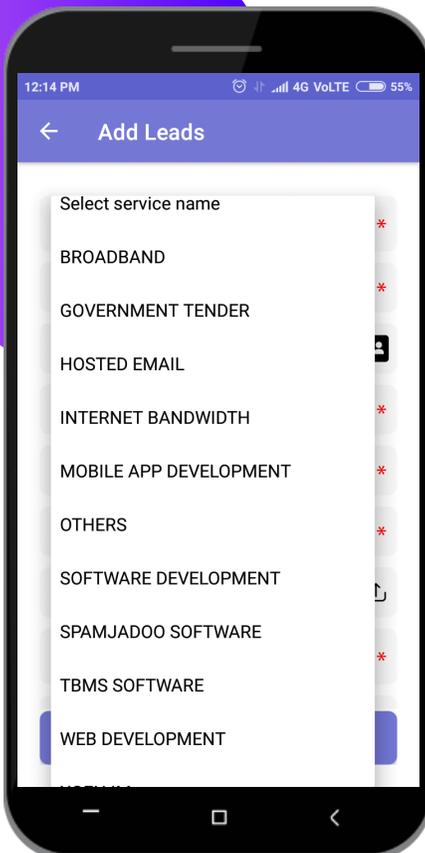- **Add Lead-** After choosing this option user can add a fresh lead.

Add Lead -

11:16 AM 4G VoLTE 60%

← **Leads Management**

This Month ▾

Total leads : 0 ₹0

Orders

Current Month
order : 0 ₹ 0

Last Month
order : 0 ₹ 0

Show Leads | Add Lead +

Fill in the fields for adding the lead. Fill all the mandatory details about the lead.
(all fields are mandatory mark as *)

12:06 PM 4G VoLTE 55%

← **Add Leads**

Select service name ▾ *

Company Name *

Contact person *

Email *

Mobile *

City *

Attach ⬆

Select service type ▾ *

Add Lead

12:14 PM 4G VoLTE 55%

← **Add Leads**

Select service name

BROADBAND

GOVERNMENT TENDER

HOSTED EMAIL

INTERNET BANDWIDTH

MOBILE APP DEVELOPMENT

OTHERS

SOFTWARE DEVELOPMENT

SPAMJADOO SOFTWARE

TBMS SOFTWARE

WEB DEVELOPMENT

Select Service Name from the dropdown. This includes all the services offered within an organization.
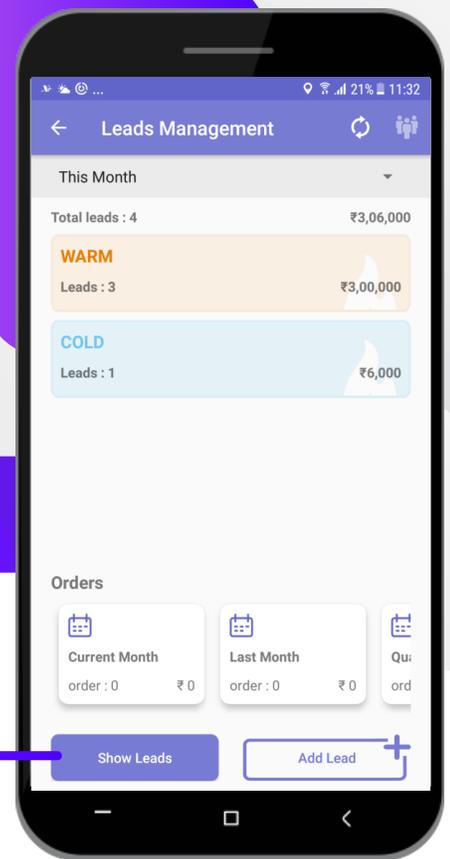
For Eg. Software Company could offer services for Mobile App Development, Software Development, Web Development etc. so the sales people will pitch for these services and generate lead for them, so the organization will provide these services in the dropdown for the user to select.

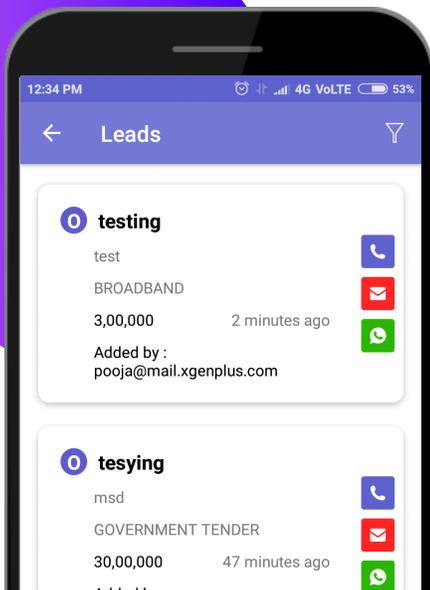**These Services are added by the Server Admin.**

- Company name will be the Company to which the user is pitching.
- **Contact person –** Write the Contact person name or select from the phone directory if details are added. (In case id contact is selected form phonebook, mobile number will be automatically added in the mobile no field)
- Email should be added of the prospect.
- Mobile No of the prospect.
- City of the prospect.
- Attach any document, files if available for future reference.
- Select Service Type from the drop. This will include the type of lead whether hot cold etc.
- These Services are added by the Server Admin.
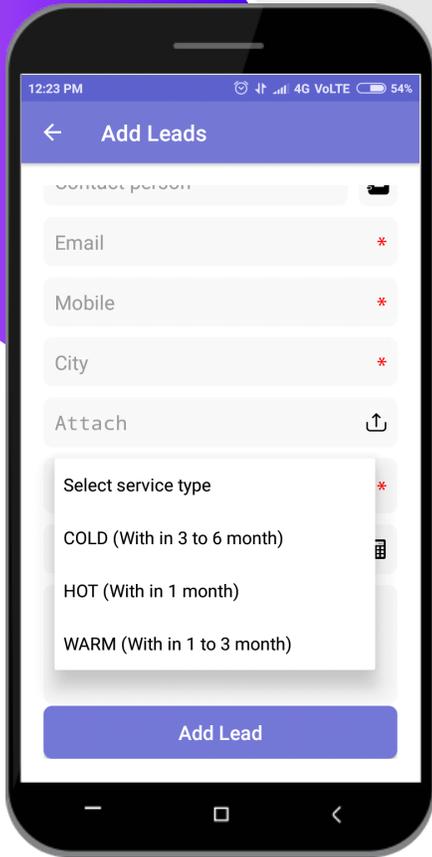
Monetary amount of the lead.
Add notes if any
After filling all these leads hit add button to add lead.

Add Leads

Email *
Mobile *
City *
Attach

Select service type *
COLD (With in 3 to 6 month)
HOT (With in 1 month)
WARM (With in 1 to 3 month)

Add Lead

User can view all the added leads from Show Leads option or by clicking on the lead details.

Leads Management

This Month

Total leads : 4 — ₹3,06,000

WARM
Leads : 3 — ₹3,00,000

COLD
Leads : 1 — ₹6,000

Orders

Current Month
order : 0 — ₹ 0

Last Month
order : 0 — ₹ 0

Qua
ord

Show Leads | **Add Lead** +

Leads

O **testing**
test
BROADBAND
3,00,000 — 2 minutes ago
Added by :
pooja@mail.xgenplus.com

O **tesying**
msd
GOVERNMENT TENDER
30,00,000 — 47 minutes ago

Leads details will appear. Now User can call, Email, whatsapp the concern person directly from here.
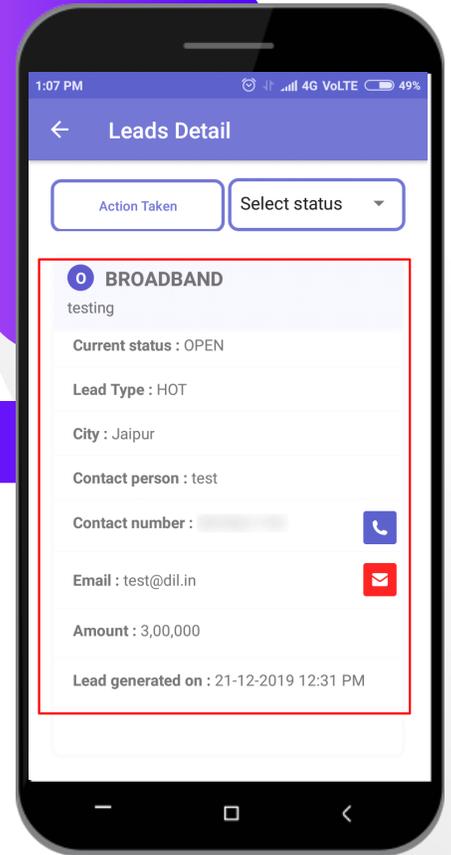
Click on the lead to view lead in detail. Lead details are non editable.
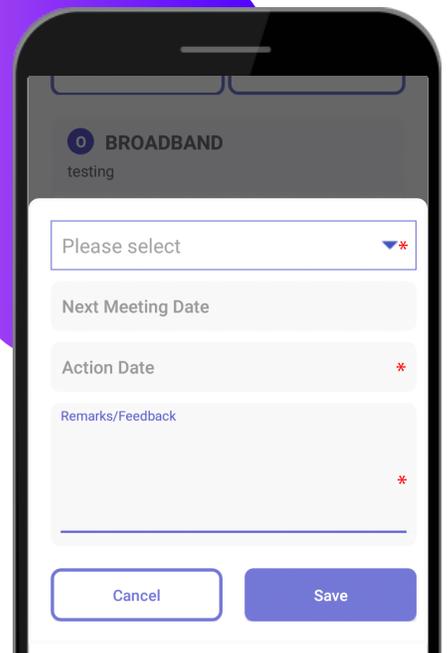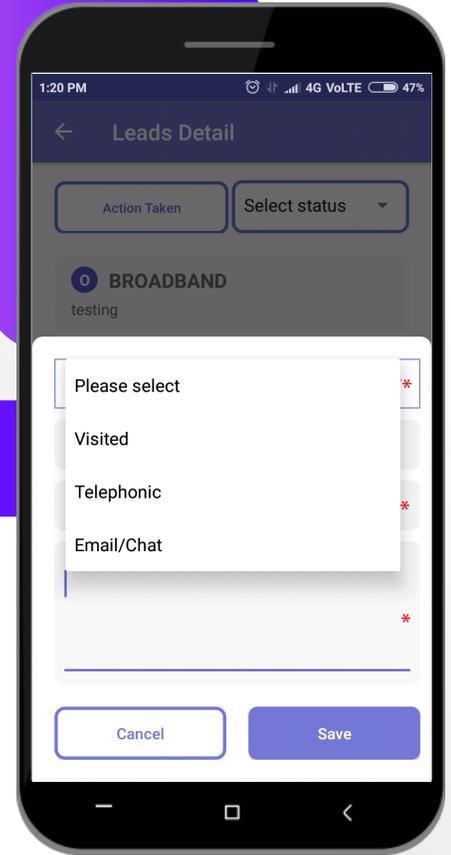
User can perform two actions:
Action Taken
Status.
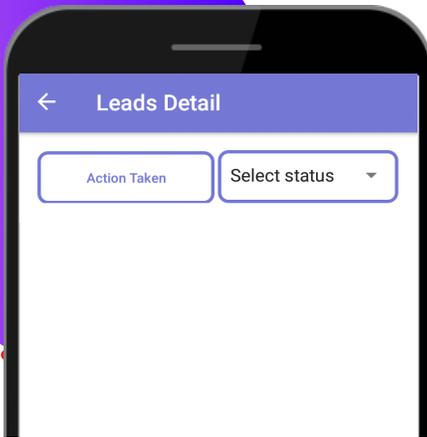
Action Taken- This option allows user to view the lead actions taken and required to be taken in future.
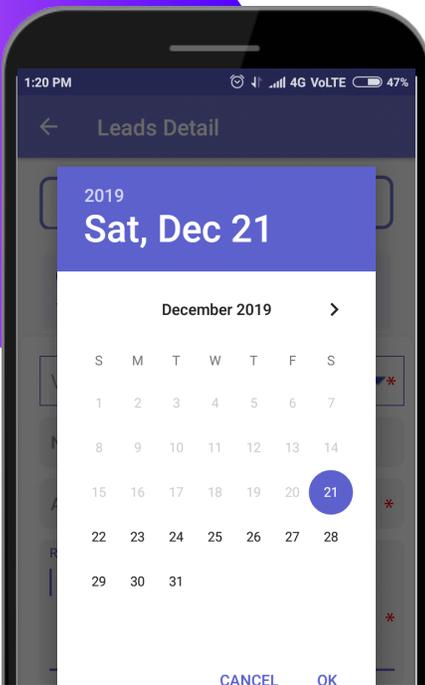
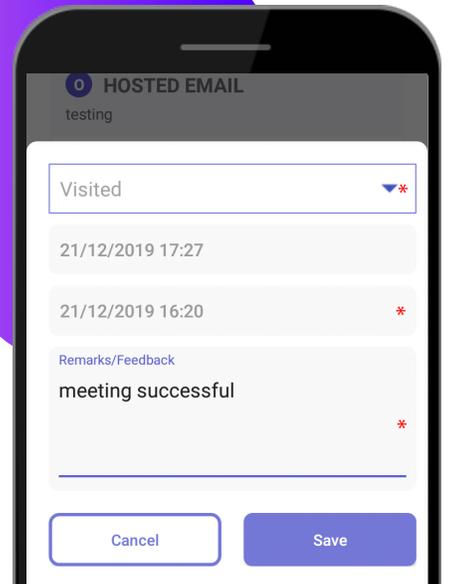This includes—

- Visited
- Telephonic
- Email/Chat

Select "Visited" if user has visited the prospect or "Telephonic" if the conversation took place over phone or Email/Chat if done over EMail

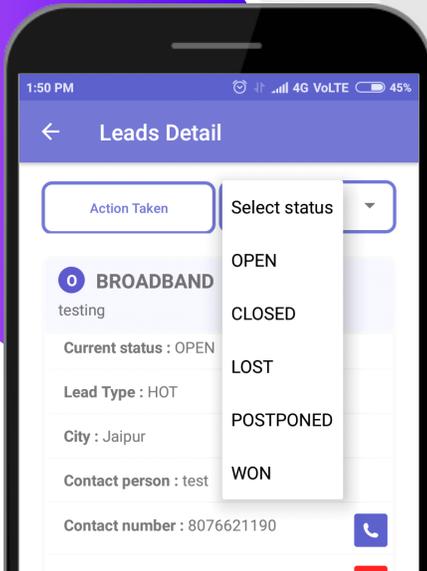Action Date- user can select the date & Time of visit and can plan for the next visit as well.

Remarks/ Feedback- User can enter the remarks/ feedback for the lead if required.

Click on save icon.
Now the Action on the lead will be saved.

• Select status-

User can select the status of the Lead if the Lead is-

- Open
- Closed
- Lost
- Postponed
- Won.

**User can update the status by selecting the desired option.**

For Each Status user will receive a status box where he/she can update the remarks along with the status. This will further enable to review the lead with status and description of each stage of lead.

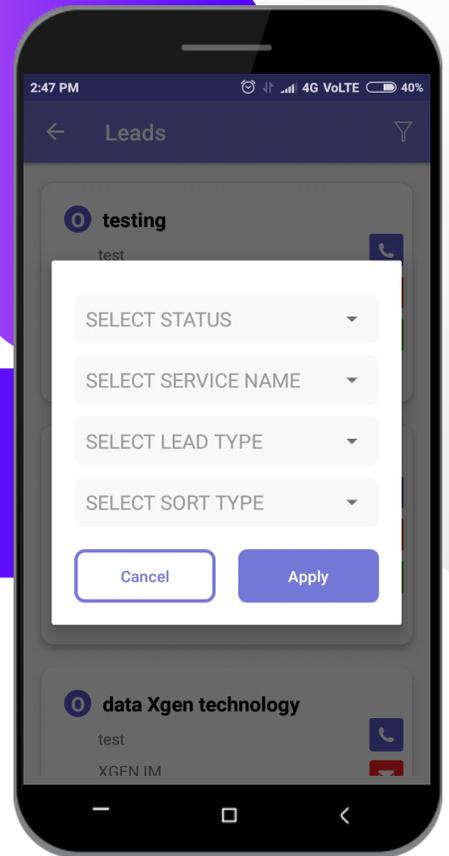Click on Save to view the Status of all leads together.
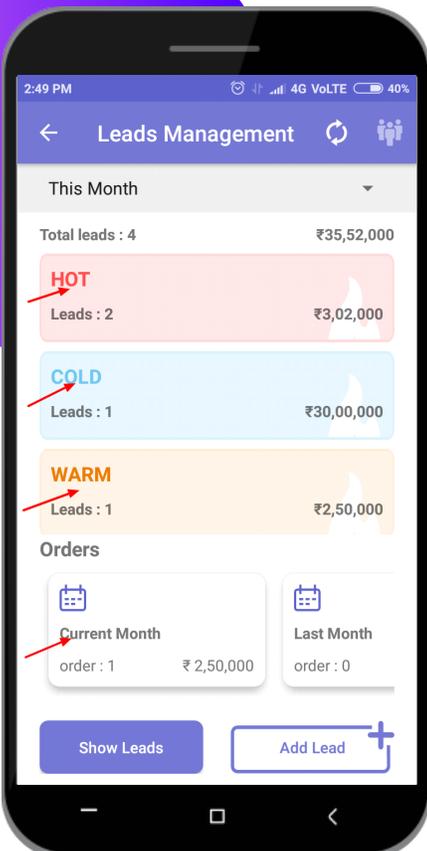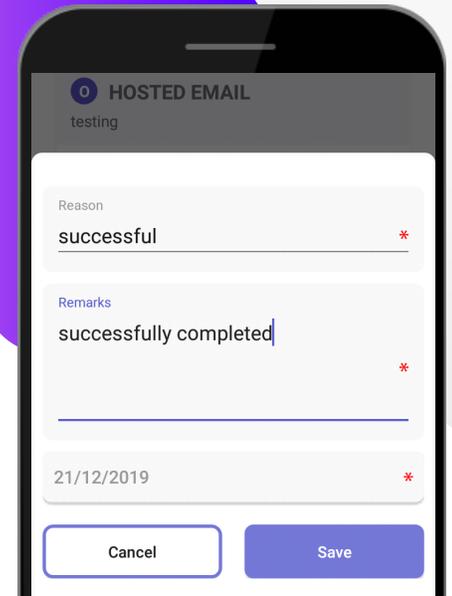
View Leads -

User can see his/ her Lead Status Monthly, Quarterly, & Total.
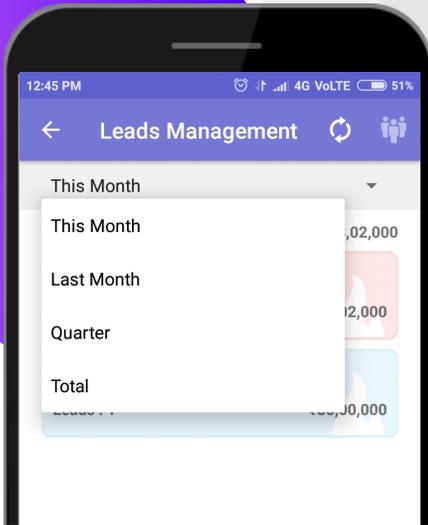
On the Dashboard click the dropdown.

Filter Lead - ▽

Lead Filter allows user to Search Leads. From this option user can Search For the specific lead, as sales persons have many leads so it becomes difficult to find previous leads & their status quickly. So this filter allows user to Search for the lead by sorting easily. User can search for a specific lead and the lead opens.

Filter lead can be done as -

- **Select Status-** user can select status whether the lead is Open, Closed, Lost, Postponed or Won.
- **Select Service Name-** Which kind of service offered for the lead.
- **Select Lead Type-** To search for a lead user have to enter lead type Cold, Hot, or Warm
- **Select Sort Type-** User can sort leads by last updated date, Amount or Company Name.

Fill all or relevant fields and hit Apply.
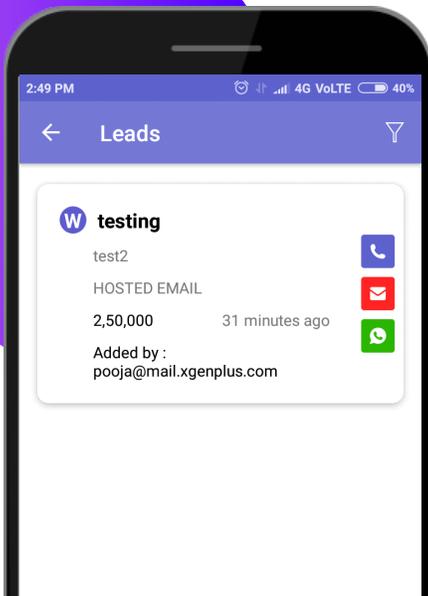
As per above screenshot, user can see all the details through Lead Filter.
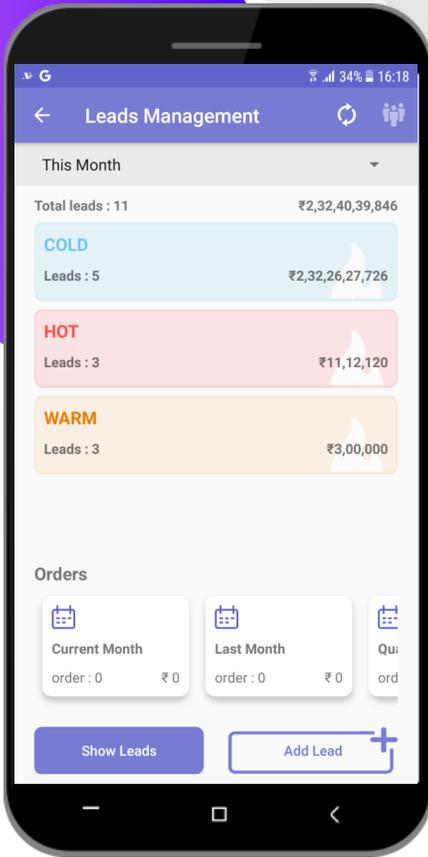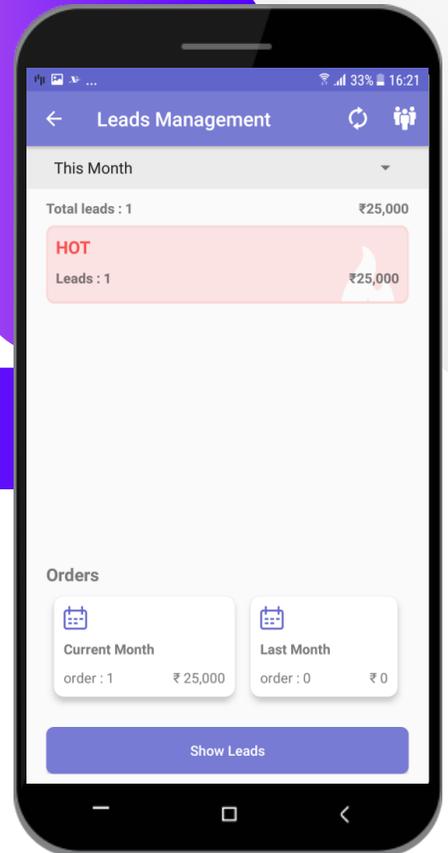
The Sales Manager can view the lead status of his team. Simply click on the people icon (👥) to view your team progress. To view specific progress, filter the criteria.
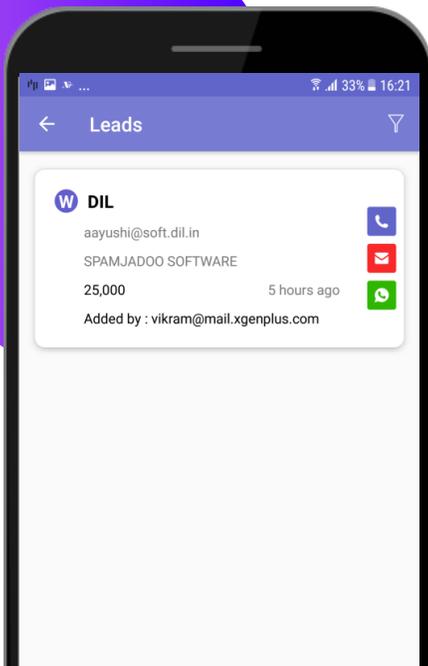
For Eg:
Mahima is the Team Leader and has John, Vikram under her team who reports to Mahima. So Mahima has the authority to see their progress.
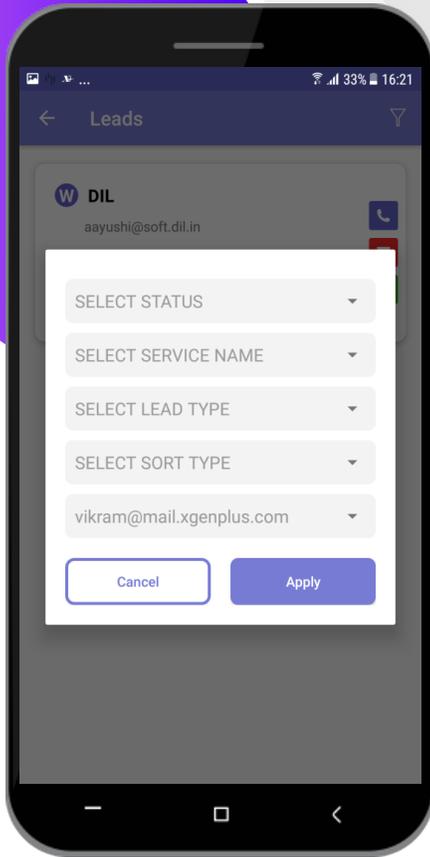
Mahima's dashboard looks like:

Click on the people button on top right corner (👥) to view team leads. On click teams lead will look like:

Click on the lead to view details.

Under added by heading user can view which team member has added the lead or to figure out who has created this lead use the filter feature.

XGEN PLUS

Most Advanced Enterprise E-mail

Note:

Lead Management feature currently available only on Android App.
To Experience Lead Management Download the Xgen Email App From Playstore.

ANDROID APP ON
Google Play