



# LEADFORCE CRM

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Leading the Modern Sales CRM – As Business Needs





## LEADFORCE

## About Us

Leadforce makes your time more productive and profitable by its **modern sales techniques** to engage more prospects and customers.

With right techniques and insights, they can sell faster and deliver a personalized experience to each customer.

*Do More of What is Seen!*

- ✓ Connect **key contact details** & Create **activity plans**
- ✓ Sell faster with **work flow automation**
- ✓ **Track entire sales** information from any device
- ✓ Organize your **sales process**, win more deals and **create happy customers**.

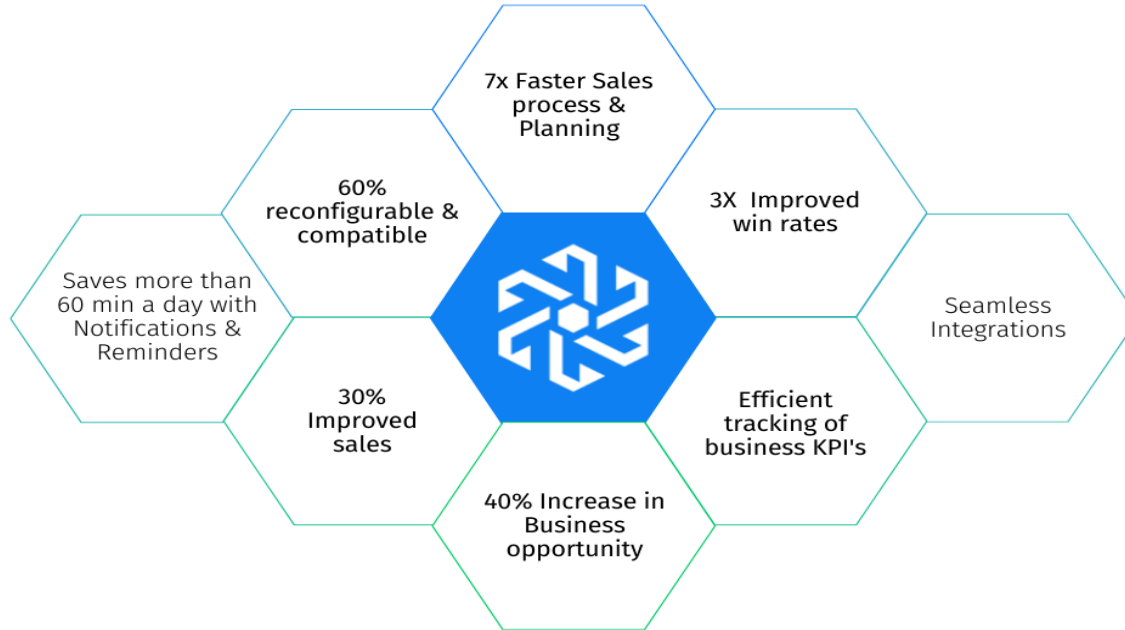
***“Smarter Sales CRM for Growing Sales Teams”***





## Know why business needs **Leadforce!**

Love Sales? Hate Boring Process? You Belong Here!!



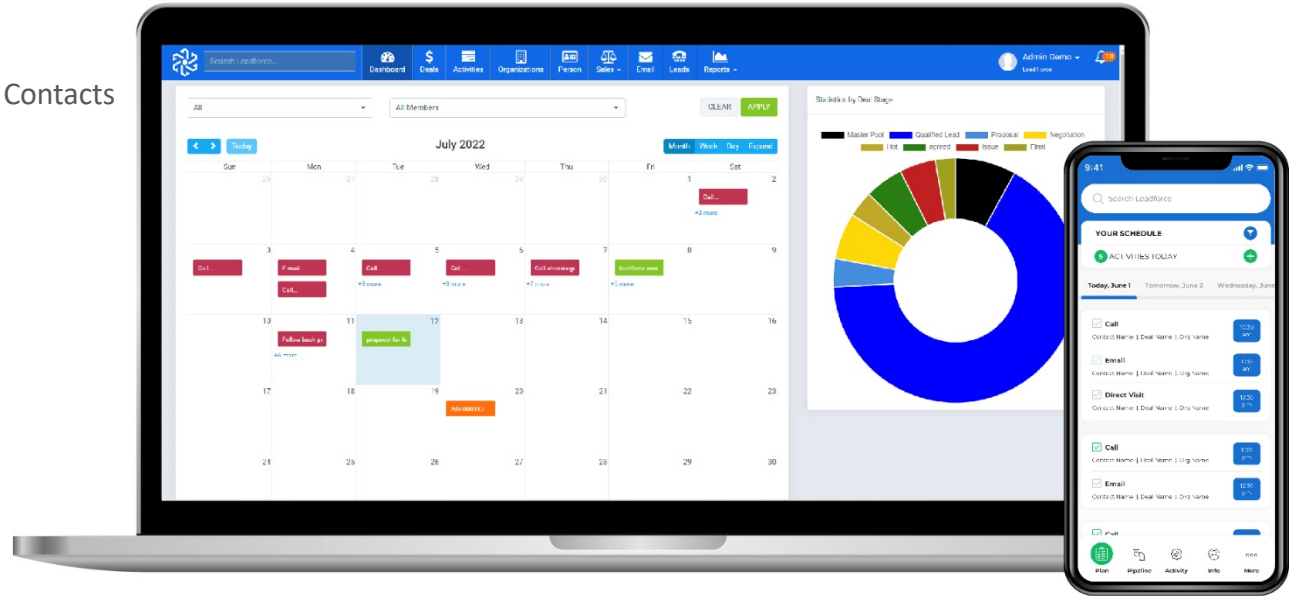
***“Streamline and Optimize Your Sales for Peak Profits”***





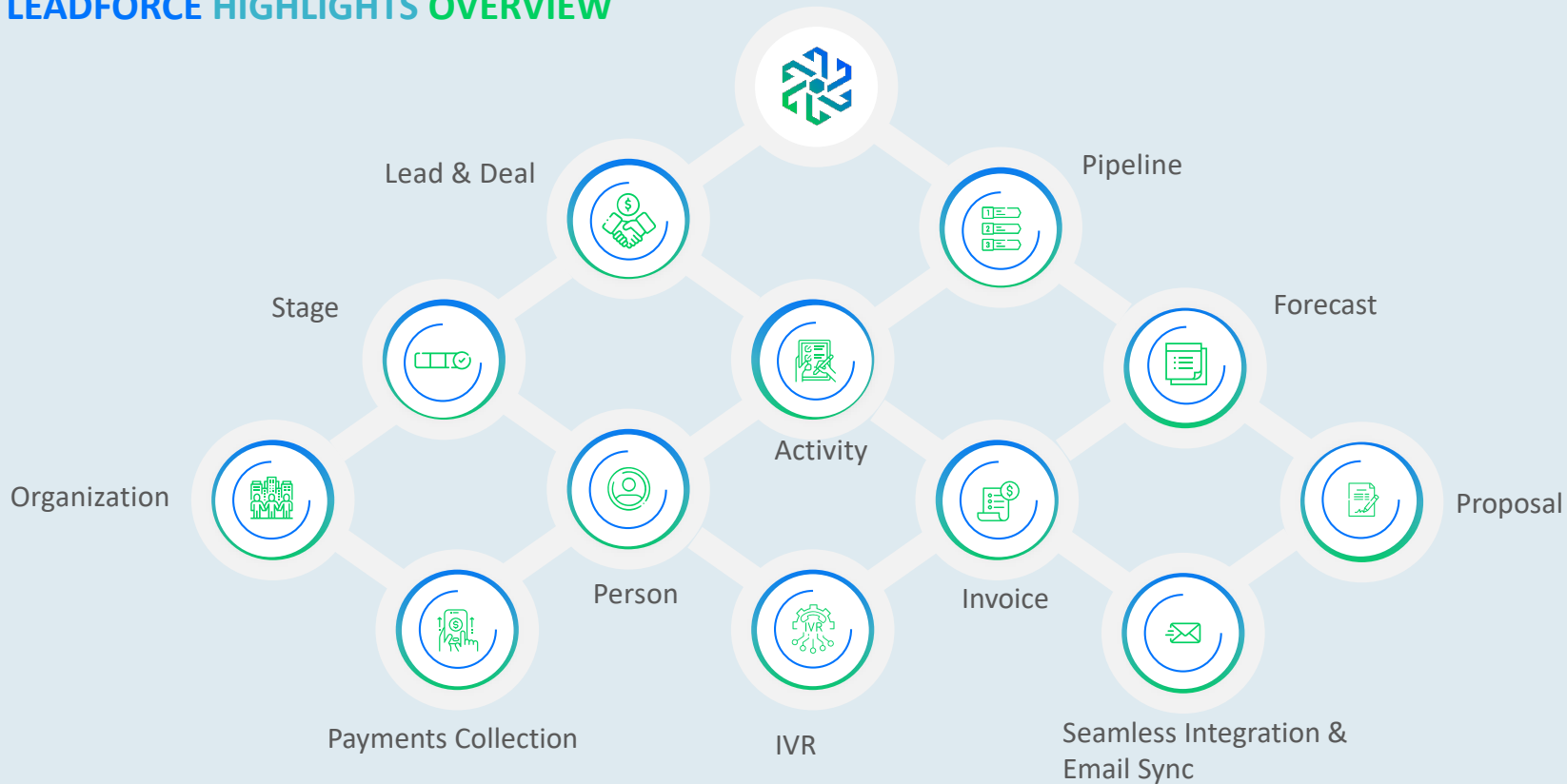
## Application Compatibility

- ✓ Planned Activity Notification
- ✓ List of Deals, Organization and Contacts
- ✓ Updating Activity
- ✓ App is available in Play Store
- ✓ Very User-Friendly
- ✓ Available in mobile application





## LEADFORCE HIGHLIGHTS OVERVIEW





## Lead Management

- ✓ Lead can be created and integrated from web sites
- ✓ Lead can be integrated with business portal India mart
- ✓ Lead can be converted Deal
- ✓ In Lead you can create Activity, Proposal and Invoice

The screenshot displays the 'Add new lead' form within a CRM application. The form is divided into two main sections: 'Profile' and 'Address'. The 'Profile' section includes fields for Name (Prakash), Position (Director), Email Address (director@oberoigroup.com), Website (oberoy.com), Phone (798980067677), Organization (oberoy), Source (Manual), and Tags. The 'Address' section includes fields for Address (Teynampet), City (Chennai), State (Tamilnadu), Country (India), and Zip Code. An 'Assigned' dropdown menu is set to 'Admin Demo'. A 'Description' text area is located at the bottom of the form. The interface features a sidebar with a 'Filter by' dropdown set to 'Assigned' and a list of leads. The top right corner shows the user 'Admin Demo' and a 'Lead Profile' link. The bottom right corner has 'CLOSE' and 'SAVE' buttons.

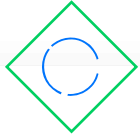




## Deal

Any person or a company which offers potential business opportunity.

Managing deals is one of the most crucial responsibilities of sales reps as it directly affects revenue growth.



### Define Deal Status

Simplify deal management by filtering deals according to their status



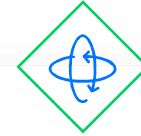
### Identify Lead Sources

Generate quality leads by looking back and evaluating their source



### Intelligent Deal Assignment

Multiple Sales Reps can be assigned for better track of a deal



### Deal-tracking Made Easy

Get access to a 360-degree view of any deal in your sales pipeline





## Pipeline & Stage

A sales pipeline is a visual way to manage complex and lengthy sales processes and move your **deals to Won**.

- ✓ Custom Fields
- ✓ Intuitive Drag & Drop Interface
- ✓ No restrictions / Multiple views
- ✓ Find deal stats easily
- ✓ Categorized by Stage

Assign **win probability** for each stage of a sales pipeline for sales forecast

**Customize your pipeline** to match your sales process

Create **multiple Pipelines** for better control and clarity over a product or team

Assign multiple or single pipeline **based on role or Hierarchy** of Sales Rep

**Track sales process** and diagnose the health of your pipeline.

Monitor key **Pipeline metrics**

**Define deal stages** and customize to reach your business goals and manage deals better



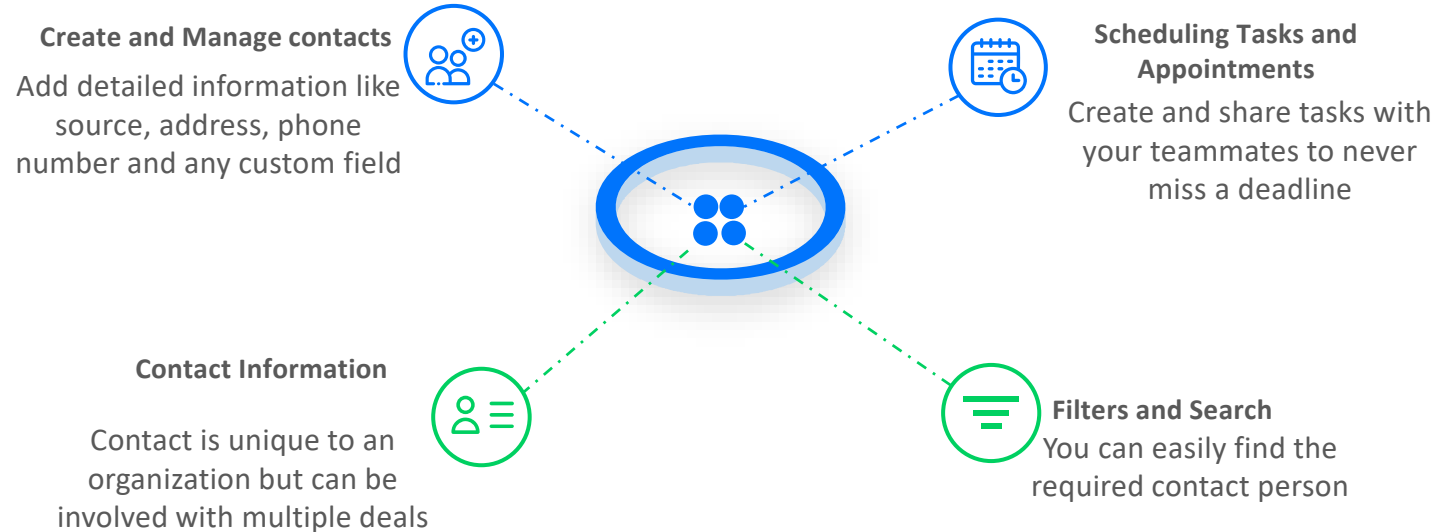




## Person

Maintain a healthy relationship with your prospects and customers.

Personalize customer interactions through various insights on your contacts over a single platform.





## Organization Management

Get all the information related to different organizations at your fingertips to effectively convert customers into profitable long-term relationships.

It visually expresses activities, deals and deal size of the Organization.

- ✓ Comprehensive **Organization Details**.
- ✓ Add an Activity, Opportunity or Contact Person.
- ✓ Map **multiple opportunities and deals**.
- ✓ Share information to Sales Rep based on necessity.
- ✓ Create group of Customers for **Specific Performance Analysis**.
- ✓ Attach multiple documents or Proposals.
- ✓ Map different **primary contact person to different deals**.





## Activities Management

Never drop any deal again. Carry forward every time with your sales activities.

Various activities to bring a prospect through a particular stage, and into the next one.

- ✓ Easily Organize and Prioritize your day.
- ✓ Create multiple custom activity types.
- ✓ Automatic reminders for Sales Reps.
- ✓ Improve individual and overall activity progress.
- ✓ Pipeline centric activity types.
- ✓ Overdue activity and deals for quick action.
- ✓ Administrators and Managers can schedule activities for Sales Reps.
- ✓ Work trends and Statistics Monitoring.
- ✓ Maximize and boost sales effectiveness.
- ✓ Customizable Activity Summary.
- ✓ Mandatory follow-up activity option.
- ✓ Multiple views for better transparency.
- ✓ Alerts and reminders on overdue activities.





## Proposal & Invoice

- ✓ Proposal to your Deal, Organization
- ✓ List the Proposal in Pipeline View
- ✓ Configure your Proposal Format
- ✓ Tax can be Created from the Master
- ✓ Send your Proposal to your Customers
- ✓ Proposal converted to Invoice
- ✓ Select or Create Email Template for your Proposal
- ✓ Maintain difference stages for the Proposal
- ✓ Customer can post their comments about Proposal and we can also reply
- ✓ About the proposal we can internally discuss using chat message
- ✓ Email tracking facility like viewed or not and time also.

Proposal #	Title	To	Total	Date	Open Till	Tags	Date Created	Status
PRO-000081	Ramesh Lead	Ramesh - Ramesh	₹4,000.00	06-06-2022	13-06-2022		06-06-2022 12:18:35	SENT
PRO-000080	Test gopal	Gopal - gopal pharma	₹4,000.00 <i>INVOICED</i>	26-05-2022	02-06-2022		26-05-2022 17:15:54	ACCEPTED
PRO-000079	Lead proposal	prakash	₹4,000.00	26-05-2022	02-06-2022		26-05-2022 11:55:48	SENT
PRO-000078	test proposal	ramesh raj 23	₹4,000.00	23-05-2022	30-05-2022		23-05-2022 16:43:30	DRAFT
PRO-000077	Test Props 20	Test Lead 20	₹0.00	20-05-2022	27-05-2022		20-05-2022 10:41:18	DRAFT
PRO-000076	Test Proposal for Lead	Ramesh Raj - Ramesh Raj	₹4,000.00	19-05-2022	26-05-2022		19-05-2022 11:33:31	DRAFT
PRO-000075	Reminder test	CASID PHARMACEUTICALS - March 2022 - Imported org 1	₹1,000.00	13-05-2022	13-05-2022		13-05-2022 11:42:11	SENT
PRO-000074	New Proposal	Deal 10/05-2 - Imported org 1	₹3,000.00	11-05-2022	12-05-2022		12-05-2022 16:58:55	SENT
PRO-000073	Proposal Test	CASID PHARMACEUTICALS - March 2022 - Imported org 1	₹4,000.00	09-05-2022	13-05-2022		09-05-2022 14:13:35	SENT
PRO-000072	testing	miller	₹0.00	09-05-2022	16-05-2022		09-05-2022 14:04:54	SENT





## A cloud Telephony System

- ✓ IVR API can be updated from Admin Login
- ✓ Call recording voice is automatically stored against deal
- ✓ Click to Call facility
- ✓ Call Start time and Time
- ✓ Call will be automatically record as a activity

The screenshot displays the 'Call Settings' configuration page in the Leadforce Admin interface. The left sidebar contains a menu with options: Setup, EMPLOYEE, ORGANIZATIONS, LEADS, PIPELINE STAGE, ACTIVITY TYPES, EMAIL TEMPLATES, CUSTOM FIELDS, PIPELINE, DEAL LOST REASONS, IMPORT DATA, ASSIGN FOLLOWERS, ACCOUNT TRANSFER, CURRENCIES, SETTINGS, EMAIL CONFIG, ACTIVITY TRANSFER, TARGET, CALL SETTINGS (highlighted), TAXES, DEAL FIELDS, INVOICE PDF SETTINGS, and REMINDER SETTINGS. The main content area is titled 'Call Settings' and includes a search bar for 'agent'. The configuration fields are as follows:

- Enable Call:** Radio buttons for Yes (selected) and No.
- Vendor:** A dropdown menu with 'Dialpad' selected. Below it, a list of vendors is shown: 'Telle CRM', 'TATA Tele Services', and 'Dialpad' (highlighted in blue).
- Country:** A dropdown menu with 'India' selected.
- Webhook id:** A text field containing '42f903fe-5b49-403f-873e-770044257537'.
- Bridge No.:** A text field containing '8068287825'.
- Record Calls:** Radio buttons for Yes (selected) and No.

A 'SAVE SETTINGS' button is located at the bottom right of the form.





## Notifications & Reminder

- ✓ All notification will go to Email
- ✓ On click the notification icon you can see the details
- ✓ Configure your notification frequency
- ✓ Notification for Activity, Proposal, Target and Customers (Deal, Lead)
- ✓ Notification field and template can be created

The screenshot shows the 'Reminder' configuration page in the Leadforce CRM. The left sidebar contains a navigation menu with options like Setup, EMPLOYEE, ORGANIZATIONS, LEADS, PIPELINE STAGE, ACTIVITY TYPES, EMAIL TEMPLATES, CUSTOM FIELDS, PIPELINE, DEAL LOST REASONS, IMPORT DATA, ASSIGN FOLLOWERS, ACCOUNT TRANSFER, CURRENCIES, SETTINGS, EMAIL CONFIG, ACTIVITY TRANSFER, TARGET, CALL SETTINGS, TAXES, DEAL FIELDS, INVOICE PDF SETTINGS, and REMINDER SETTINGS (which is highlighted). The main content area is titled 'Reminder' and includes the following sections:

- Enable Reminder:** A toggle switch set to 'Yes'.
- Reminder Settings:** A dropdown menu currently showing 'Company Level'.
- Activity Reminder:** Four checkboxes for 'Activity Reminder', 'Proposal Reminder', 'Target Reminder', and 'Customer Reminder' are all checked.
- Customer Reminder:** A radio button for 'All Activities' is selected over 'Required Activities'.
- Send Email Reminder Before Activity Start:** Three dropdown menus for days, hours, and minutes, all set to '0'.
- Activity Reminder (Detailed):** Checkboxes for 'Show Alert', 'Send Separate Email', and 'Include Summary Email' are all checked. Below them, another set of day/hour/minute dropdowns is shown, also set to '0'.
- Include Summary Email:** A dropdown menu set to 'Daily' and a text field with the placeholder 'please select time'.
- Proposal Reminder:** A checkbox for 'Show Alert' is checked, and 'Include Summary Email' is unchecked. Below are day/hour/minute dropdowns set to '0' and a 'Please Select Time' text field.
- Target Reminder:** This section is partially visible at the bottom of the screen.



## Seamless Integrations!

- ✓ Can be integrated with many social media platforms like Facebook, LinkedIn, WhatsApp etc.,
- ✓ Every lead forms can be integrated.

### Email Integration & Sync

- ✓ Seamless email integration
- ✓ Send email from Lead Force
- ✓ Email sync with Deal
- ✓ Send email from Deal
- ✓ Email Template can be created

Company Mail Settings

Deal

Email in Local

Mail Server Setting

Company

SMTP Settings IMAP Settings

Mail Server

Yahoo

SMTP Host

smtp.mail.yahoo.com

Email Encryption

TLS

SMTP Port

587

Email

rameshraj346@yahoo.com

SMTP Username

rameshraj346@yahoo.com

SMTP Password

\*\*\*\*\*

SAVE SETTINGS



## Set Targets!

The image shows a CRM interface with a 'Set Targets!' section. It features two modal windows for setting targets.

**Add Target Modal (Left):**

- CHOOSE ENTITY:** A dropdown menu with 'Deal' selected.
- CHOOSE GOAL TYPE:** Three options are listed: 'Added' (Based on the number or value of new deals), 'Progressed' (Based on the number or value of deals entering a certain stage), and 'Won' (Based on the number or value of won deals). The 'Added' option is highlighted.
- Buttons:** 'CANCEL' and 'CONTINUE'.

**Add Target Modal (Right):**

- Assign:** A dropdown menu with 'Company' selected. A list of options is shown below: 'Company', 'User', 'Team', and 'Select Pipeline'. 'User' and 'Team' are highlighted.
- Tracking Metric:** Radio buttons for 'Value' and 'Count'. 'Count' is selected.
- Interval:** A dropdown menu with 'Weekly' selected.
- Duration:** Two input fields for 'Start Date' and 'End Date'.
- EXPECTED OUTCOME:** A section with two columns: 'Interval' and 'Count'. The 'Interval' column has a dropdown menu with 'Weekly' selected. The 'Count' column has an empty input field.
- Buttons:** 'PREVIOUS STEP', 'CANCEL', and 'SAVE'.

- ✓ Fix target for User, Team and Company
- ✓ Fix Target Financial Year and Calendar Year
- ✓ Fix Target for Weekly, Monthly, Quarterly, Yearly
- ✓ Fix Target Sales and Activities



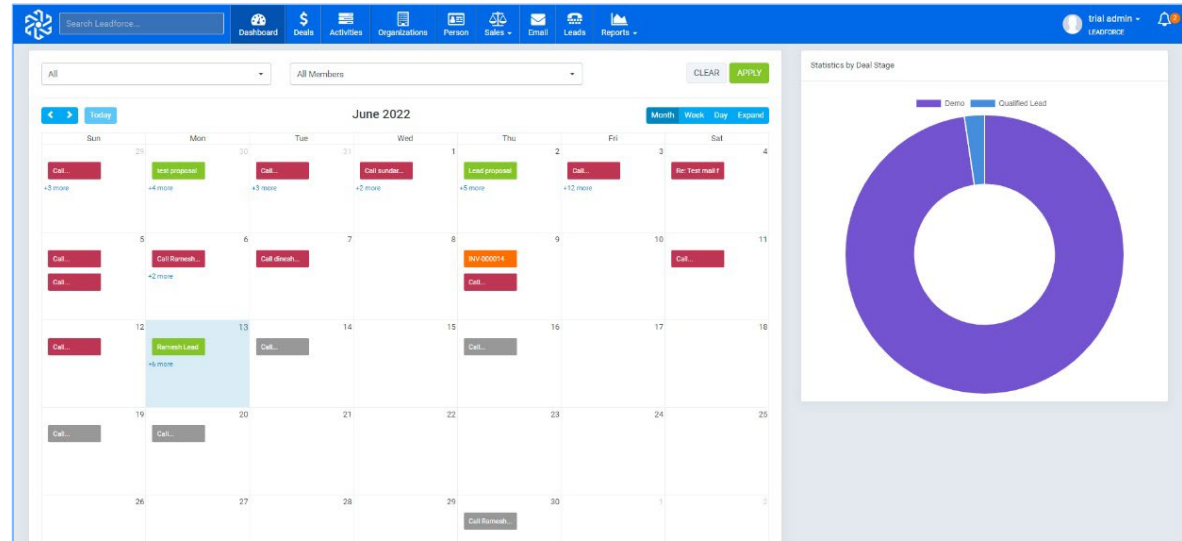




## Hyper-intelligent Dashboards!

### Deal Dashboard

- ✓ Top Sales Reps
- ✓ Sales Pipeline Funnel
- ✓ Total Sales
- ✓ Weighted Sales Pipeline
- ✓ Lost Opportunity by Reason
- ✓ Total Value by Opportunity
- ✓ Win Rate



### Activity Dashboard

- ✓ Calendar view of Activity by Sales Reps
- ✓ Insights of Activities like Activities added, completed, overdue
- ✓ Call average of Sales Rep
- ✓ Deal progress, started, velocity and conversion





## Dynamic Dashboard/Reports & Insights!

Leadforce handles vast amounts of sales and customer data, which, if analyzed strategically, can be instrumental in optimizing marketing and sales. They help in enhancing sales performance and develop meaningful interactions with customers.

### Dynamic Report Generator makes your report

#### Deal

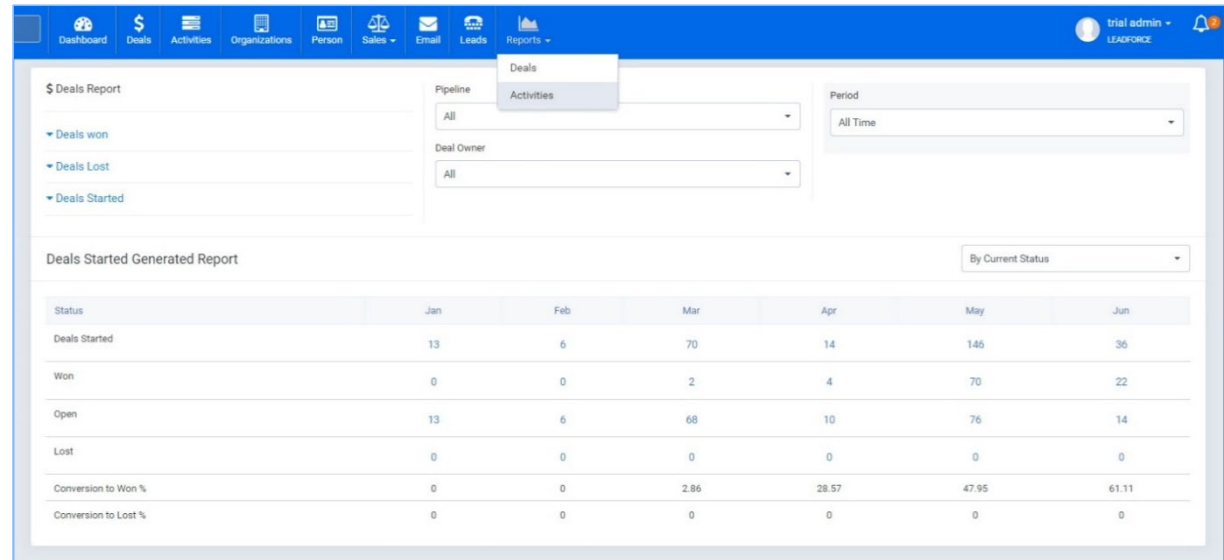
- ✓ Stage Duration Report
- ✓ Deal Progress Report
- ✓ Sales Process Report
- ✓ Conversion rate Report
- ✓ Source Effectiveness Report

#### Activity Report

- ✓ Contact Person
- ✓ Deal
- ✓ Organization

#### Lost sales Report

- ✓ Time to First Action by User Report





## Work Flow Automation – Automate your Sales process, make process smarter!

- ✓ Custom Field
- ✓ Activity & Account Transfer
- ✓ Hierarchy
- ✓ Import Data from Excel
- ✓ Assign Follower

- ✓ Multi Currency
- ✓ Configure
- ✓ Reminder Settings
- ✓ Invoice Settings
- ✓ Call Settings





[REQUEST DEMO](#) 



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<https://leadforce.in/>

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