



Aqqurate Solutions Lead Management Software User Guide

TRACK AND CONVERT

www.aqqurate.net

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1. DASHBOARD

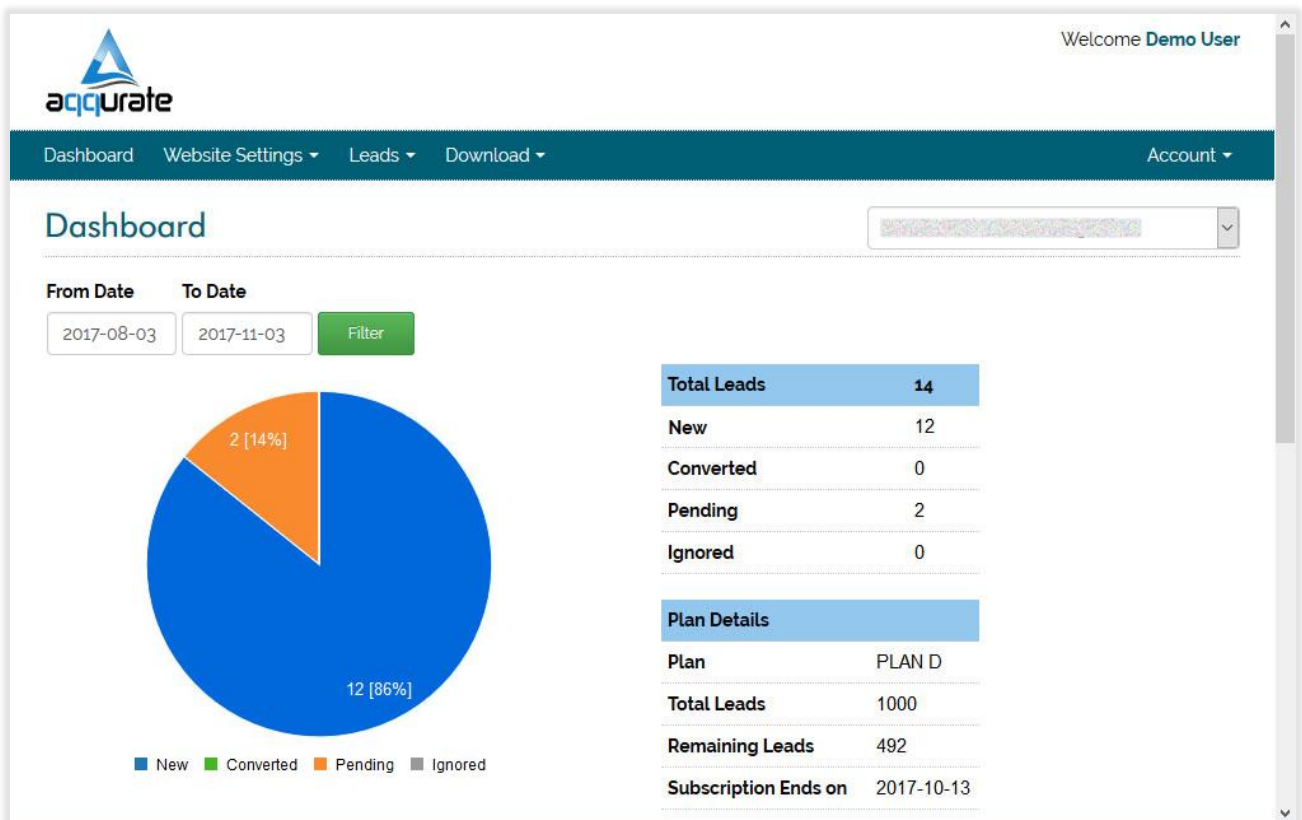
Dashboard

The Dashboard displays all available leads as smart diagrams or pie charts. This helps you to understand your website’s performance in a single snapshot.

The pie charts represent total leads generated vs

- Converted
- Ignored
- Pending

The Dashboard also calls for action or reminds you to attend to pending or New leads.



The above demo Pie chart shows the percentage and leads counts for a certain website during a particular time period.

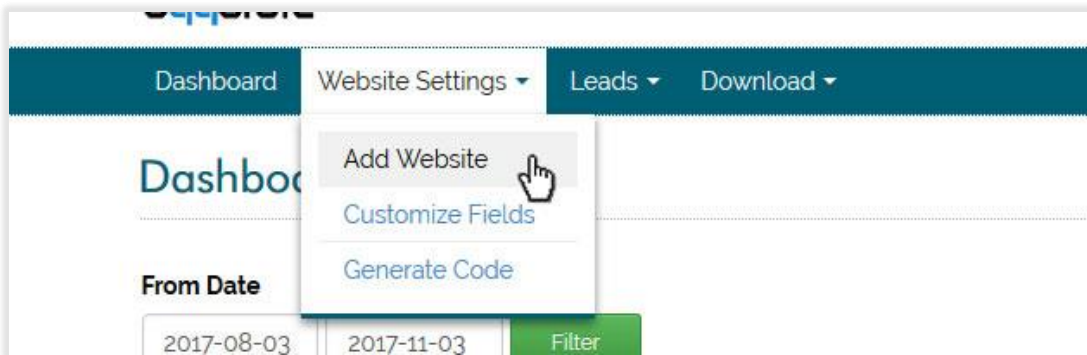
Legend is displayed below the chart to indicate colour references for each type of lead.

2. WEBSITES

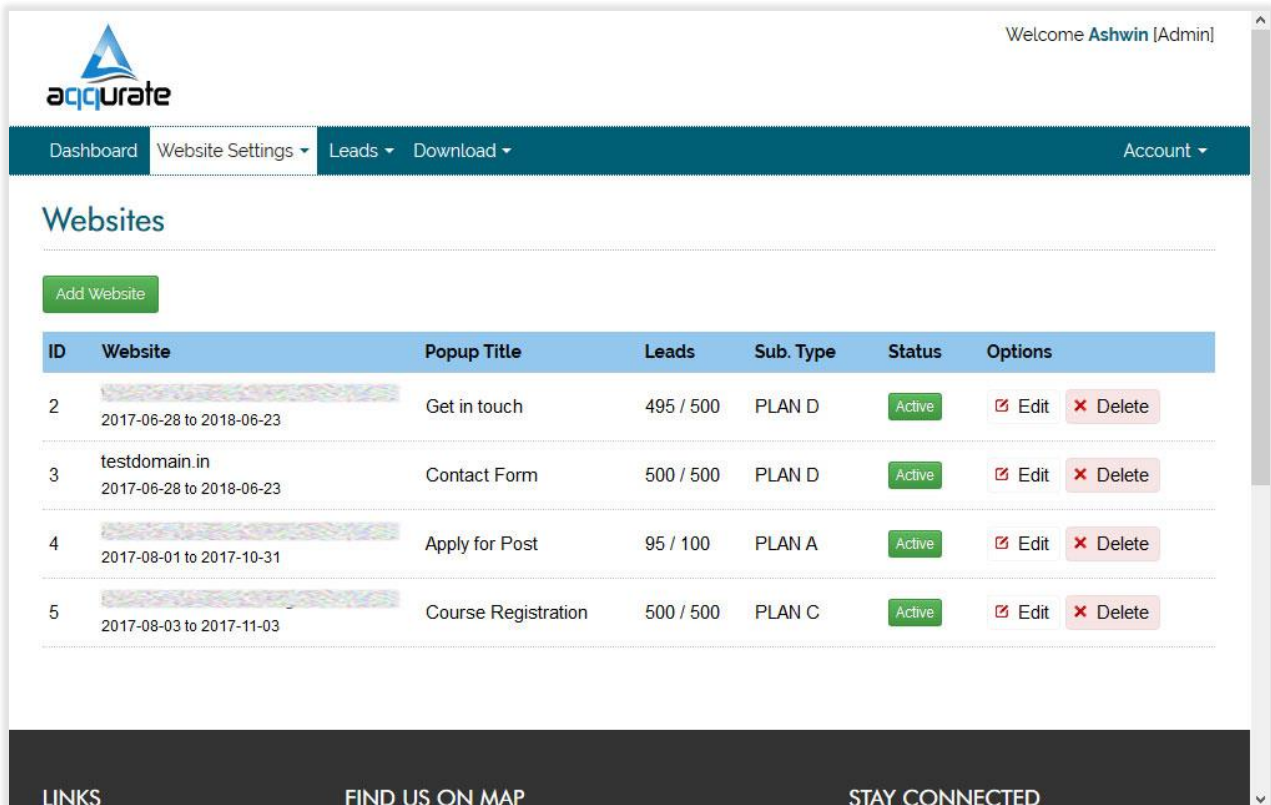
Websites

Adding your Website to the software is the first step towards generating leads. When you add your Website, you will be able to create / generate your own customised pop-up enquiry form. This module allows you to add any number of domains or websites that your business has. Each domain will receive a unique pop-up code which you need to copy paste to your website's code. Once you publish the code, the pop-up form will be activated and will start collecting leads when users visit your website.

To navigate to Website page, follow the link Account > Login > Websites Settings > Add Website.



This page will display a list of all websites that you have added under your account and the respective status, available leads vs total leads and validity type etc.



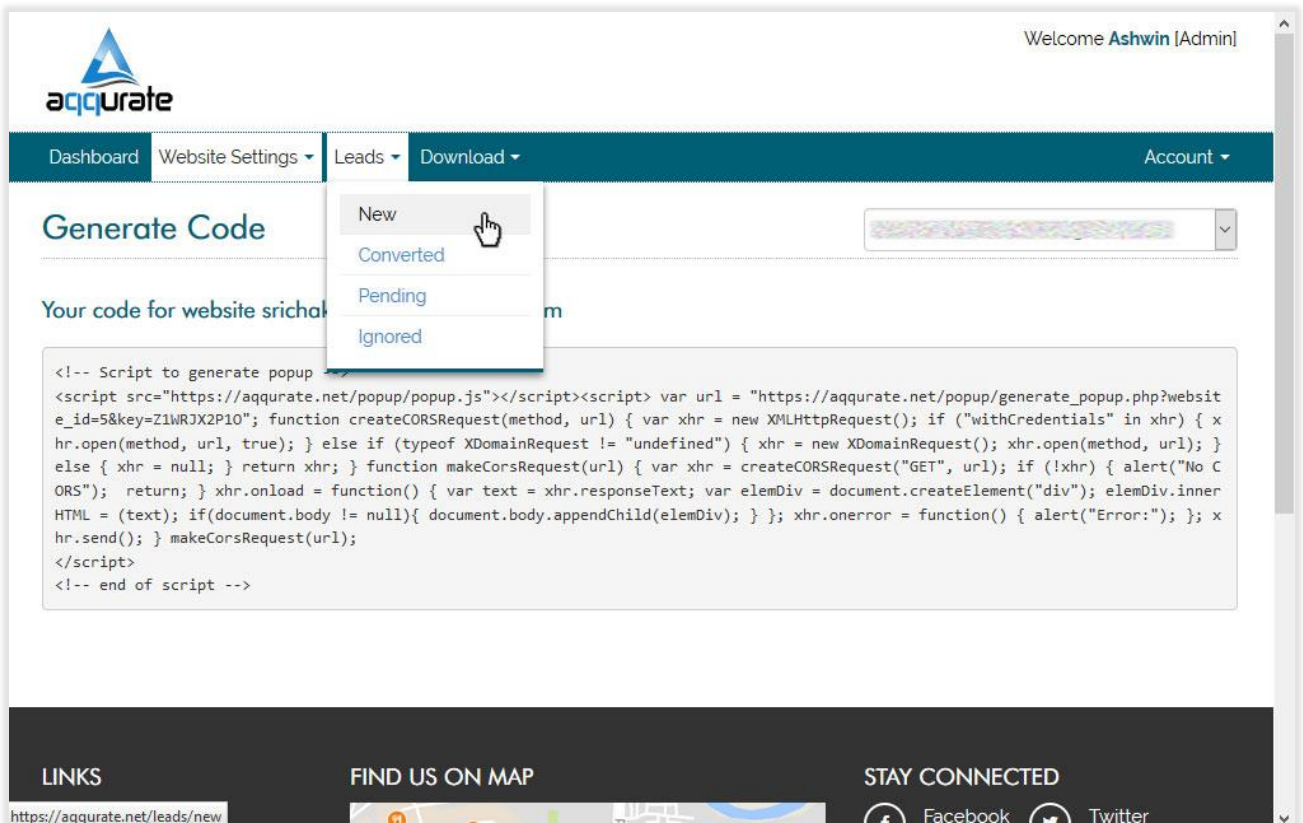
3. LEADS

Leads

This module allows you to view information pertaining to all leads. Leads are mainly sorted into four types: New!, Converted, Ignored and Pending.

New information which is latest from popup window on your website captured will come under New! section of Leads. You may then take action and mark each lead to be either converted, ignored or kept pending.

Each of these links can be accessed by following Account > Leads and then view drop downs.

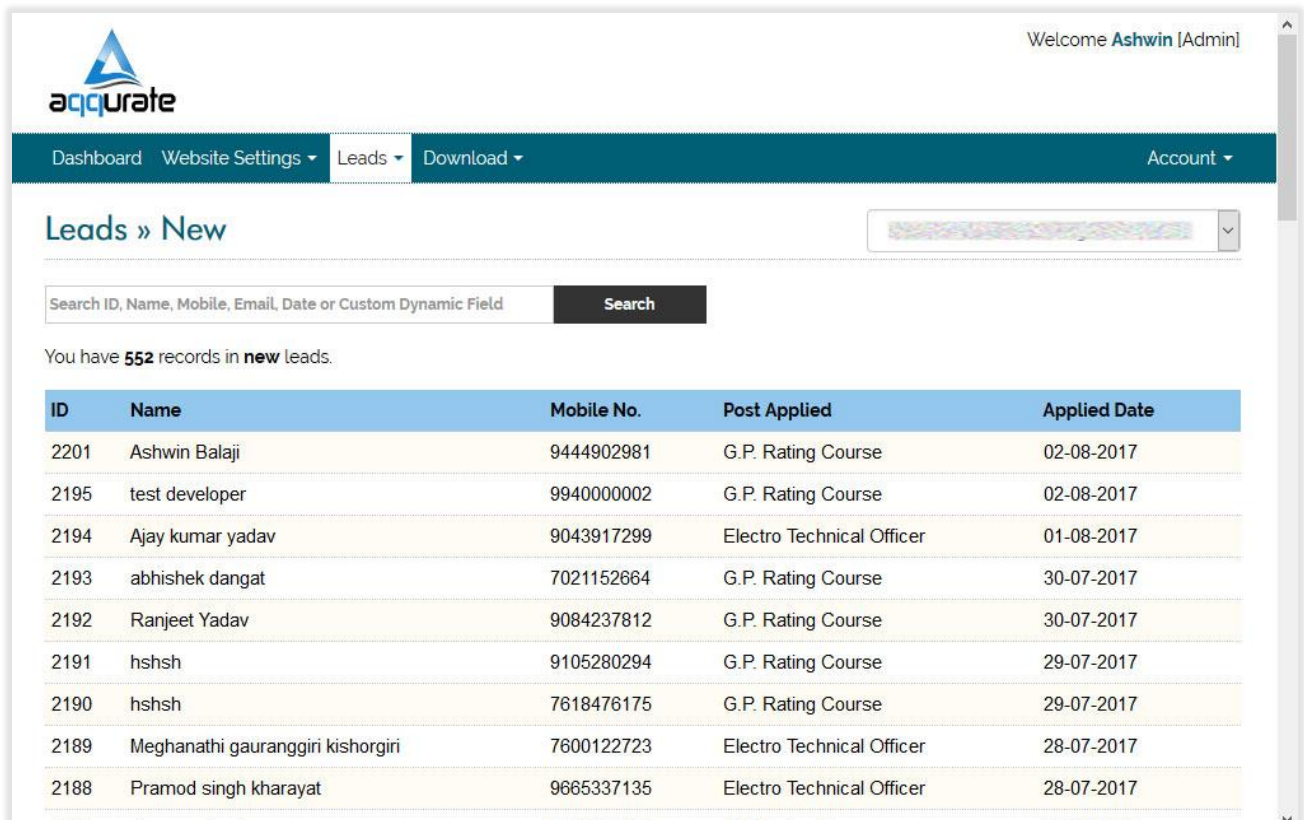


4. New!

All Leads

This page will reflect all new leads as and when they are generated, on a real-time basis. This information can be searched by ID, name of lead, mobile number, email or date registered.

In this module, any lead can be converted with few other features.



The screenshot shows the Acqurate web application interface. At the top right, it says "Welcome Ashwin [Admin]". The navigation menu includes "Dashboard", "Website Settings", "Leads", "Download", and "Account". The main heading is "Leads » New". Below this is a search bar with the placeholder text "Search ID, Name, Mobile, Email, Date or Custom Dynamic Field" and a "Search" button. A message states "You have 552 records in new leads." Below this is a table with the following data:

ID	Name	Mobile No.	Post Applied	Applied Date
2201	Ashwin Balaji	9444902981	G.P. Rating Course	02-08-2017
2195	test developer	9940000002	G.P. Rating Course	02-08-2017
2194	Ajay kumar yadav	9043917299	Electro Technical Officer	01-08-2017
2193	abhishek dangat	7021152664	G.P. Rating Course	30-07-2017
2192	Ranjeet Yadav	9084237812	G.P. Rating Course	30-07-2017
2191	hshsh	9105280294	G.P. Rating Course	29-07-2017
2190	hshsh	7618476175	G.P. Rating Course	29-07-2017
2189	Meghanathi gauranggiri kishorgiri	7600122723	Electro Technical Officer	28-07-2017
2188	Pramod singh kharayat	9665337135	Electro Technical Officer	28-07-2017

CONVERT LEAD OPTIONS:

ID	Name	Mobile No.	Post Applied	Applied Date
150	Tambe gorakhanath tatoba	9822591374	G.P. Rating Course	18-07-2016
<input checked="" type="radio"/> Converted <input type="radio"/> Pending <input type="radio"/> Ignored Comments <input type="text"/> <input type="button" value="Add New"/> <input type="button" value="Save Data"/>				
149	ankush kumar	9857033113	G.P. Rating Course	16-07-2016
148	surendra kumar	8173034265	G.P. Rating Course	13-07-2016
147	Madhan	9095748183	Other Courses	12-07-2016
146	Madhan	9095748183	Other Courses	12-07-2016

When you click on a lead, the entire row will expand as seen in the above image. You can then select any of the options to either convert, ignore or pending.

For Converted:

While converting, you can add comments in the field provided and then clicking **“Add New”** . After adding comments, you can click **“Save Data”** to complete the step.

For Pending:

You can add comments for pending lead conversion. You also have an option to set SMS and Email reminder for you to take action later.

ID	Name	Mobile No.	Post Applied	Applied Date
150	Tambe gorakhanath tatoba	9822591374	G.P. Rating Course	18-07-2016
<input type="radio"/> Converted <input checked="" type="radio"/> Pending <input type="radio"/> Ignored Comments <input type="text"/> <input type="button" value="Add New"/> Reminder <input type="radio"/> Remind me on <input type="text"/> <input type="radio"/> Remind me every <input type="text"/> <input type="button" value="v"/> <input checked="" type="radio"/> Do not Remind me <input type="button" value="Save Data"/>				

You can set the reminder with specific date or time frame in terms of hours, days, weeks or months.



SMS and email will be sent on the specific date or time frame.

For Ignored:

Just as the previous options, you can simply add any comments and mark it as ignored.

ID	Name	Mobile No.	Post Applied	Applied Date
150	Tambe gorakhanath tatoba	9822591374	G.P. Rating Course	18-07-2016
<input checked="" type="radio"/> Converted <input type="radio"/> Pending <input type="radio"/> Ignored				
Comments				
<input type="text"/>				
<input type="button" value="Add New"/>				
<input type="button" value="Save Data"/>				
149	ankush kumar	9857033113	G.P. Rating Course	16-07-2016
148	surendra kumar	8173034265	G.P. Rating Course	13-07-2016
147	Madhan	9095748183	Other Courses	12-07-2016
146	Madhan	9095748183	Other Courses	12-07-2016
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All these leads will reflect under the respective section of Leads.

You can convert any lead from any section by expanding row and then clicking on lead row.

5. THANK YOU

Thankyou!

