

Agenda for meeting on 14/07/2025

1. CRM e-mail integration (SMTP error)
2. CRM Quotation updates and Addition of Terms and Conditions.
3. CRM General points
4. CMS duplication issue
5. CRM--BDM and Project manager portals
6. E-invoicing process
7. HRMS – Test Cases and follow-Up
8. Server Upgrade
9. Folder Structure and Files names created in IT end.

CRM Points :--

- 1.addtion of Automobile sector ---Addition of Sector option @Superadmin level
2. Status flow distortion—

The screenshot displays a CRM application interface. At the top, a pink header bar shows 'Mentor Name : Sandesh' and 'All Bookmarks'. The main content area is divided into several sections:

- Left Sidebar:** Contains a 'Status' section with 'Dashboard' and 'List' tabs, a search bar, and a 'Summary' table.
- Main Form (LEAD ID: 1311):**
 - Company & Personal:** Fields for Company Name (Ajay Infotech Pvt Ltd), Mobile No. (9512458254), Alternative No., Person Name (Ajay Mahata), Company Area (Mumbai), Company Address (Gandhi Nagar, Mumbai 411055), Sector (Information Technology), Nature of sector (IT Services), Position (Owner), Email Id (Ajayinfotech@gmail.com), Concern Person, Position, and Mobile No.
 - Opportunity:** Fields for Project (VideoWala Bus Stand), Creatives (YES), and buttons for 'Preview' and 'Create Link'.
 - Advertisement Area:** Fields for Payment Mode (Onlinee) and a plus icon.
 - Payment Details:** Fields for UTR (85421585632), GST No., TDS (One - 2%), Grand Total (28000.00), Total Payable Amount, and Paid Amount.
- Right Panel:**
 - Order Status:** A vertical timeline showing stages: BDE (2023-07-08 15:26:19), ERP (), Quality Assurance (Ankita Londhe) (2023-07-08 15:27:19), Higher Authority (MD) (2023-07-08 18:02:04), and IT (IT) (2023-07-08 18:58:48).
 - History:** A section with a table showing lead history, including columns for Lead Up, Done, and Reason.

Here also—

Mentor Name : Sandesh

LEAD ID: 1319

Status

Dashboard List

Name*

Enter Name

Mobile*

Enter Mobile No.

Lead Id

Enter Lead Id

Search

Summary

New Lead	3
Payment Done	4
Procced To QC	24
Rejected	7
ERP Approved	0
Total	38

Company & Personal

Company Name

Khanna Industries

Mobile No.

9512485623

Alternative No.

Enter Alternative Mobile No

Person Name

Rajesh Khanna

Company Area

Mumbai

Company Address

Kala Ghoda Bandar, Mumbai 4

Sector

Manufacturing and Sma...

Nature of sector

Manufacturing Industries

Position

Owner

Email Id

Khannaindustries@gmail.com

Concern Person

Enter Concern Person

Position

Enter Concern Position

Mobile No.

Email Id

Opportunity

Project

VideoWala Bus Stand

Creatives

YES

Preview

Create Link

Advertisement Area

Payment Mode

Onlinee

Payment Details

UTR

951248523548

GST No.

Enter GST Number

TDS

One - 2%

Grand Total

55999.99

Total Payable Amount

Paid Amount

Order Status

BDE

2025-07-09 11:26:21

ERP (Suhas)

2025-07-09 11:21:27

Quality Assurance ()

Higher Authority (MD)

2025-07-09 11:32:04

IT ()

3. preview button at Documents

Mobile No.

8589448484

Alternative No.

Enter Alternative Mobile No

Person Name

Enter Person Name

Company Area

Enter Company Area

Company Address

Enter Company Address

Sector

Select sector

Nature of sector

Enter Nature of sector

Position

Enter position

Email Id

darshan@gmail.com

Concern Person

Enter Concern Person

Position

Enter Concern Position

Mobile No.

Email Id

Select Creatives

Advertisement Area

Payment Mode

Select Payment Mode

Document

Adharcad

Choose File

No file chosen

666343444

Choose File

No file chosen

123456

Choose File

No file chosen

New Lead

2025-07-09

14:5

Remark

Remark

Update

History

Tarvi

2025-07-09 14:51:00

New Lead

4. Action button at BDE Reports.

ReachOut

Page Expired

Linux

Google

crm.reachoutmediattech.com/report/counselor-report

Name : Tarvi Email : tarvi_bde@reachoutmediattech.com

BDE Wise Report

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#	Lead Id	Company Name	Contact	Email	Address	Lead Creation Date	Last Update Date	Next Action Date	Status	Remark	Action
1	1082	Tushar Kharate	2225259915	customercare@everestspices.com	5th Floor, Krushal Commercial Complex, G. M. Road, Amar Mahal, Chembur (West), Mumbai - 400099	19-06-2025	08-07-2025	19-06-2025	Procced To QC	Creatives Receive	
2	1098	Renuka sharma	9847551236	renuka@gmail.com	pune	19-06-2025	30-06-2025	30-06-2025	Rejected	Lead Updated By Suhas And Transferred In Rejected And Reason: not showing the amt (not credited to account)	
3	1105	Mr. Jay Mangal Jay Mangal	8037248167	KHUSHIHERBAL17@GMAIL.COM		19-06-2025	07-07-2025	07-07-2025	Rejected	Lead Updated By Poopa pawar And Transferred In Rejected And Reason: Not visible	
4	1113	Mohan L. Yadav	8047024420	mrmmedtech@gmail.com	Plet No. 368, Sector 68, IMT, Faridabad, Haryana, India - 121004	19-06-2025	19-06-2025	19-06-2025	Payment Done	Payment Done	
5	1115	Manish Mittal	8448536009	sales@biofootprintshealthcare.com	70A-29, Najafgarh Road, Industrial Area, New Delhi - 110015	19-06-2025	19-06-2025	19-06-2025	Payment Done	Payment Done	
6	1118	Minesh Patel	9974051019	krupal.minesh@gmail.com	1st Floor, Shivam, Nr. Post Office, Asanwa, Ahmedabad, Gujarat, India - 380008	19-06-2025	19-06-2025	19-06-2025	Payment Done	Payment Done	
7	1119	Ashish Dhawan	8588868641	office@hemodiaz.com	954, DOA Colony, Pocket-C, Group-III, Haatsal, Vikaspuri, Uttam Nagar, New Delhi, 110059	19-06-2025	19-06-2025	19-06-2025	Payment Done	Payment Done	
8	1121	Kiran Patel	9033842026	rudramarketingsolution@gmail.com	F-43, City Square Mall, Godrej Garden City Behind Nirma University, Off Sakinaka Gandhinagar Highway, Village Jagatpur, Ahmedabad-382470, Gujarat, India	19-06-2025	19-06-2025	19-06-2025	Payment Done	Payment Done	
9	1124	hanshyam Tripathi Tripathi	9805512297	ecom@manzpharma.com	Rampur Ghat., Rampur Ghat Road, Paoonta Sahib, Simrour, Himachal Pradesh, India - 173025	19-06-2025	08-07-2025	08-07-2025	Rejected	Lead Updated By Poopa pawar And Transferred In Rejected And Reason: Not Visible	
10	1125	Nikunj Kedia	804986135	belcrossmedical@gmail.com	Belcross Industries Private Limited229, Santia,	19-06-2025	19-06-2025	19-06-	Procced	Creative Done	

5. Client Name should get added in following(Quotation)

Page Expired Linux Google

ReachOut
L. Media Web Pvt. Ltd

Name : Tanvi Email : tanvi_bde@reachoutmediatech.com

Dashboard
Quotations
HRMS
Attendance
Reports

Create New Quote

Search by Quote Number Search by Name --Select Status -- Search Reset

Quotation List:

No	Quote Number	Company Name	Client Name	Date	Valid Until	Action	
1	QTN-445	Renuka sharma		2025-06-21	2025-06-25		Quote History
2	QTN35	Adidas Footwear Footwear Footwear		2025-07-18	2025-07-27		Quote History
3	QTN361000001	VOLTAS BEKO BEKO		2025-07-05	2025-07-09		Quote History
4	QTN/VBS/2024-25/37	Sakshi Joshi		2025-07-10	2025-07-11		Quote History
5	QTN/VBS/2024-25/38	film production house		2025-07-10	2025-07-18		Quote History
6	QTN/VBS/2024-25/39	Bank of India		2025-07-10	2025-07-12		Quote History
7	QTN/VBS/2024-25/43	Oriflame Pvt Ltd Pvt Ltd		2025-07-11	2025-07-17		Quote History

Showing 1 to 7 of 7

6. Clients should be arranged in Date wise manner in search or in Bucket

Status

Dashboard **List**

Company Name*
Enter Company Name

Mobile*
Enter Mobile No.

Lead Id
Enter Lead Id

Search

Nilkamal

PUMA

Usha

Summary

New Lead	1
Payment Done	13
Procced To QC	32
Notified	0

Also (It should be arranged as per updated date—It will convenient for BDE to track)

	Next Date :2025-07-07			
6	PUMA	8956212112,7798465111	puma89@gmail.com	i
	Date Creation Date: 2025-07-07 13:38:41 Update Date : 2025-07-09 16:31:21 Next Date :2025-07-07		Remark : Creatives Received	
7	Nilkamal	7986563133,	nilkamal89@gmail.com	i
	Date Creation Date: 2025-07-07 13:36:08 Update Date : 2025-07-14 16:04:47 Next Date :2025-07-07		Remark : handed To QC	
8	Borosil	8986532114,	borosil89@gmail.com	i
	Date Creation Date: 2025-07-07 13:18:21 Update Date : 2025-07-14 16:01:53 Next Date :2025-07-07		Remark : handed to QC	
9	Oreva	7865321311,8564553131	Oreva34@gmail.com	i
	Date Creation Date: 2025-07-07 13:10:41 Update Date : 2025-07-07 15:37:58 Next Date :2025-07-07		Remark : Payment Done	
10	Sleepwell	8962336221,8945612311	sleepwell08@gmail.com	i
	Date Creation Date: 2025-07-07 13:05:50 Update Date : 2025-07-07 16:01:15 Next Date :2025-07-07		Remark : Payment Done	
11	Priya Gold Gold	7796656232,7863213211	priya45@gmail.com	i
	Date Creation Date: 2025-07-07 13:01:13 Update Date : 2025-07-07 15:31:59		Remark : Payment Done	

7. Current Monday should not be selected for campaign as lead will go through approval cycle.

Select

PIS Location

AATRAJI CENTRAL BUS STAND

SHIRALA CENTRAL BUS STAND

Calendar

< > today

July 2025

month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Set Campaign

Select Campaign

One Week

Start Date

2025-07-21

End Date

2025-07-27

Minimum Slot Selection

350

Max Slot Selection

15120

Select Slot

350

Total Screen

1

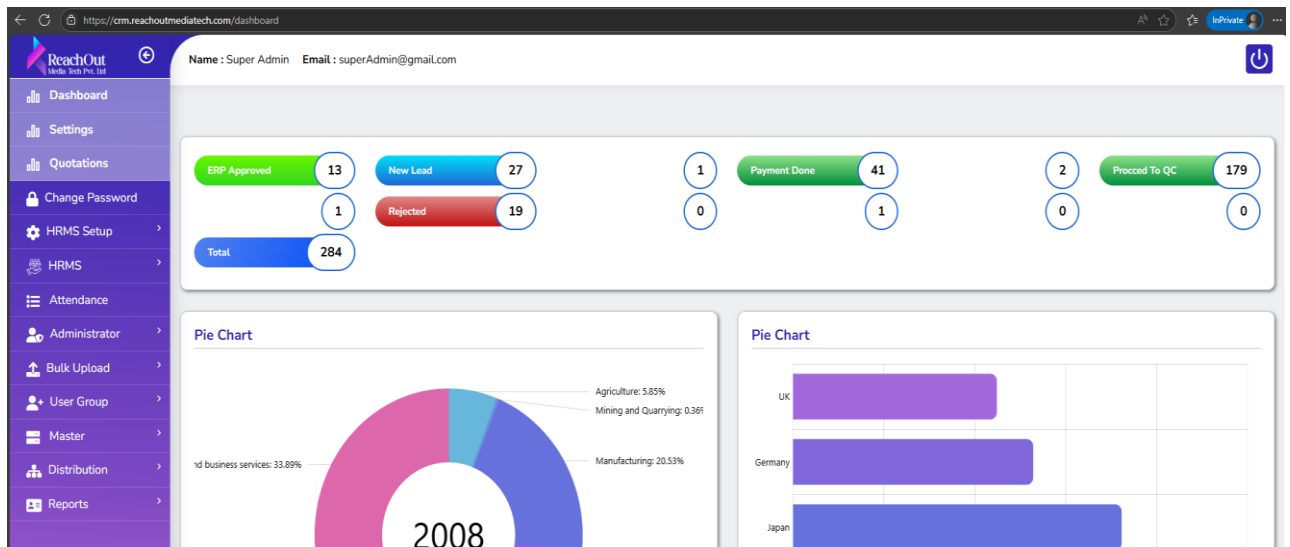
Proceed Bill

Total Days	14
Total Screen	3
Total Amount	842372.755 Rs/-
SGST	9.00%
CGST	9.00%
Grand Total	993,999.85

8. In Quotation, Amount should be in two decimals only.(round function **round()** can be used here)

SuperAdmin :-

--All tabs in dashboard are distorted



--All Quotations should be shown in Superadmin bdewise.

The screenshot shows the Quotations list with the following data:

No	Quote Number	Company Name	Client Name	Date	Valid Until	Action
1	OTN-445	Renuka sharma		2025-06-21	2025-06-25	Quote History
2	OTN35	Adidas Footwear Footwear Footwear		2025-07-18	2025-07-27	Quote History
3	OTN361000001	VOLTAS BEKO BEKO		2025-07-05	2025-07-09	Quote History
4	OTN/VBS/2024-25/37	Sakshi Joshi		2025-07-10	2025-07-11	Quote History
5	OTN/VBS/2024-25/38	film production house		2025-07-10	2025-07-18	Quote History
6	OTN/VBS/2024-25/39	Bank of India		2025-07-10	2025-07-12	Quote History
7	OTN/VBS/2024-25/43	Oriflem Pvt Ltd Pvt Ltd		2025-07-11	2025-07-17	Quote History

Showing 1 to 7 of 7

--Close button is not working on this end. (Reports>>BDE wise Report>> Action button>>close button)

The screenshot shows the Counselor-wise report with the following data:

#	Lead Id	BDE	Company Name	Contact	Email	Address	Lead Creation Date	Last Update Date	Next Action Date	Status	Remark	Action
1	1080	Nikhil Ghan	R. Srinivasan	8422890082	smile@suryodayabank.com		19-06-2025	30-06-2025	19-06-2025	Procced To QC	pay	
2	1085	Nikhil Ghan	Nikhil	9645857585	Nikhil@gmail.com	pune	19-06-2025	05-07-2025	19-06-2025	Procced To QC	pay recvd	
3	1089	Nikhil Ghan	Apeksha Shandare	8788991995	apeksha123@gmail.com	hadapsar	19-06-2025	25-06-2025	19-06-2025	Procced To QC	CREATIVES RECVD	

--lead distribution cycle (leads from other sources website, social media)

ReachOut
MEDICAL EDUCATION

Dashboard
Settings
Quotations
Change Password
HRMS Setup
HRMS
Attendance
Administrator
Bulk Upload
User Group
Master
Distribution
Lead Distribution
Reports

Name : Super Admin Email : superAdmin@gmail.com

Leads Cycle Distribution :

No	Employee Name	Demo Active	Demo Present/Absent	closed Active	closed Present/Absent
1	Kalpita				
2	Tanvi				
3	Nikhil Ghan				

--User Group – there is no team lead position.

Bulk Upload

User Group

-- BDM

-- Team Lead

-- BDE

Master

Distribution

Reports