

A close-up photograph of a man with short dark hair and round glasses, smiling warmly. He is wearing a light blue collared shirt. The background is blurred, showing another person in a blue shirt.

# LEAD MANAGEMENT SOFTWARE

## KEY FEATURES

- Life time ownership with unlimited users
- Extremely user friendly.
- Complete data security –all executive level
- Complete monitoring of each lead activity from allocation to conversion / lost
- Bulk Leads Upload /distribution and allocation
- Option of Local network and cloud based hosting
- Automated leads distribution from web or social media
- Duplicate leads control / elimination
- Automated / compulsory reminders for each leads
- Telephone / WhatsApp and email integration and option of call logs and call recordings and bulk sms /emails
- Documents uploads e.g. DL/ Reg card Quotes / Policy saved in the system forever
- Customized reports and data fields set up based on preference
- Performance monitoring by each individual / team / Dept.
- Leads analysis – lost sales / converted / cold / hot etc.
- Dash Boards / Daily sales report etc.



### Automate Leads Systems

Get rid of adding leads from different sources manually. Insource has inbuilt feature to fetch leads automatically from different sources Indiamart, PharmaHoppers, Leads From Website etc.

#### Features

- Automatically Lead Fetch
- Save time of team
- Fast lead updating in dashboard



### Secured Application

Security is the major concern which is faced in many lead management software. But Insource has the full security features that make it best lead management software like

#### Features

- No one can see the other leads in team.
- IP based security is also available for premium members.
- 100% secured.



### Track Leads Activity

Track lead activity is the awesome feature of Insource In this feature you can track the leads sources wise. Like which lead is generated through which source.

#### Features

- Easy to differentiate sources.
- Easy to find most important lead sources.
- Easily find the source with high conversion rates.



### Team Productivity

Team productivity is the major concern which almost 90% of organizations are facing nowadays. So in Insource we have taken care of this thing. Here are the features

#### Features

- Track complete activity of employee like meeting update.
- Hot lead, Cold lead and dead lead concept also available.
- Total calls/meetings status team wise, manager wise & individual.



### Manage Your Teams

Get rid of all the hassle of managing the big teams. Insource bring the most effective and easy to use hierarchy that can handle any team size.

#### Features

- Top level hierarchy. Manage team leaders, executives and other staff easily.
- Assign leads team wise of staff wise.
- Track complete activity of employee individually.



### IP Based Security

Our lead Management system have IP based security feature too. As we all know data security is the most important thing for any business. If you want that your Insource lead management software will be login in your office only then it can be done with this feature.

#### Benefits

- Easy to assign IP Address to access the backend panel
- Highly secure.
- Easy to maintain.



### Bulk Lead Assignment

One more feature that Insource Lead management system has is assigning leads in bulk. So that you can save time in assigning leads one by one.

#### Features

- Easily select leads for bulk assignment.
- Save precious time and efforts of your team members.
- Increase team performance.



### Duplicate leads Check

In Insource you can also check duplicate leads. If there are common sources and you have assigned leads for different team members. So in Insource they can easily check duplicate leads.

#### Benefits

- It saves time for individual team members.
- You can also improve team performance.
- It is also helpful in sorting the returning customers.



### Bulk Upload Leads

Insource has not only automatic lead fetch feature but also has manual one. If you have leads in bulk on csv or excel sheet then you can upload leads in one go.

#### Features

- Drag and Drop facility for bulk upload.
- Bulk upload leads and assign to individual team members.
- Time saving and Data saving.



### Daily Sales Report

Insource Lead Management Software has the daily sales report feature that allows you to track the daily sales done by the sales team individually.

#### Benefits

- You can track individual sale executive performance on daily basis.
- Increase the productivity of the team individually
- Also the data is helpful in planning the individual incentives of the team.



Dashboard



Dashboard



Global Search



9,301  
Total Leads



1,468  
New Leads This Month



0  
Unassigned Leads

AED

218,787.00  
Total Revenue

### Lead Types

+ Add Lead

HOT

44

FOLLOWUP

455

COLD

987

LOST

1982

NEXT YEAR

1290

CONVERTED

88

Repeat

0

Reminders

302

Today Leads

0

Daily Sales

Report

TRASH

2

### My Team

[Print](#) [Excel](#)

User	Total	HOT	FOLLOWUP	COLD	LOST	NEXT YEAR	CONVERTED
Abrar	1587	9	30	70	136	158	40
ahmed	1440	13	92	80	505	240	1
amer	274	11	13	27	51	20	0
Dabboo	204	3	25	0	1	1	0
hisham	1151	0	30	148	534	208	16
Ilham	1099	1	25	345	233	181	11
joy	767	0	0	173	201	75	1

### Latest Leads

[View All](#)

ERGA SERVICES & CONSEILS  
1 month ago

Mr. Mohamed Ali Saleh Mohamed Al Karbi  
1 month ago

Mr. Nuaman Easa Mohamed Al Ali Al Shamsi  
1 month ago

Mr. Ahmed Abdellatif Youssef Mohamed Emara  
1 month ago

Ms. Alya Ali Hassan Mohamed Al Marzooqi  
1 month ago

Mr. Murad Abdallah Mohammed Saleh  
1 month ago

Ms. Sara Abdul Qader Abdul Rahman



## Leads



-- Lead Status --



ahmed hammady



-- Lead Source --



-- Reminder --



+ Lead

-- All Divisions --



-- All Service --



All leads



-- Lead Type --



Export

-- Cities --



All Leads



Select year



Select Month



Data type



☐ Select All 15

935 Leads Found

Action		Name	Vehicle Type	Model Year	Depricited Value	Chassis No	Last Update	To be Reopen	Month	Data Type	Assigned to	
<input type="checkbox"/>	1	Ms. Hind Ahmed Alhanaee	MASERATI Levante	2017	195,190.00	ZN6YU61FXHX219854	STILL WAITING DOCS	04 Jul, 2021 11:30	JUN	INS LOST DATA	ahmed hammady(Executive)	
<input type="checkbox"/>	2	Mr. Omar Hussain Omar Hebri	MASERATI Levante	2017	213,259.00	ZN6YU61F8HX252772	INTERNATIONAL CALL	30 Jun, 2021 03:30	JUN	INS LOST DATA	ahmed hammady(Executive)	
<input type="checkbox"/>	3	James Richard Thorn	Maserati LEVANTE S	2017	197,676.00	ZN6YU61F2HX190138	IN JUL 20	20 Jul, 2021 04:00	JUN	INSURANCE	ahmed hammady(Executive)	
<input type="checkbox"/>	4	Mr. Reza Sabetnia	MASERATI Levante	2019	275,400.00	ZN6YU61F0KX325687	STILL IN AUG	15 Jul, 2021 11:15	JUN	INVOICING	ahmed hammady(Executive)	
<input type="checkbox"/>	5	Mrs. Fatma Ibrahim Mohamed Al	MASERATI Levante	2018	254,745.00	ZN6XU61F9JX274488	renew allready	05 May, 2022 03:45	JUN	INVOICING	ahmed hammady(Executive)	
<input type="checkbox"/>	6	Mr. Nassim Haider	MASERATI Levante	2017	199,776.00	ZN6XU61F6HX243936	MOBILE CLOSE	01 Jul, 2021 11:30	JUN	INVOICING	ahmed hammady(Executive)	



AYESHA MOHAMMAD HASSAN TAHER



Leads

AYESHA MOHAMMAD HASSAN TAHER



Global Search



## AYESHA MOHAMMAD HASSAN TAHER

ATM

Plate No :  
SALGA2BE0KA

Vehicle Type : RANGE ROVER

Model Year: 2019

previous value : 553,500.00

Depreciated Value : 498,150.00

Issue Date : 2019-07-27

Expiry Date: 2020-08-26

Reference :

Nationality :

Month : JUL

Data Type: INSURANCE

Data Classification : CURRENT

MONTH

insurer : OMAN

Lead Since 1 week ago

971559

971559

Edit Lead

Update Latest

Leads History

Customer Ledger

Assigned History

## Sales

Abrar Khalid

## Report To

Pinky Figueredo

Lead Type ☐ HOT ☒ COLD ☐ LOST ☐ NEXT YEAR ☐ CONVERTED ☐ FOLLOWUP

-- Select Purpose --

x insurance x

## Remarks

Remarks

## CC to:

-- Select Members --

Unassign To Me

## Attachment

Choose Files No file chosen

CC to Customer:

Reminder on

Reminder

Update Details

## Requirement

[Read more](#)

## Last Activities

No answer .. 18 Jul, 2021 at 04:40 PM

**Purpose:** Call **Service:** insurance , **Call Status:** Not Answered **Lead Type:** COLD  
**Reminder:** 27-07-2021 at 03:09 PM