

Using LeadCon Sales Companion! Step by Step Guide!



Your Sales Companion!

Capture & Convert
Prospects \Leftrightarrow Customers

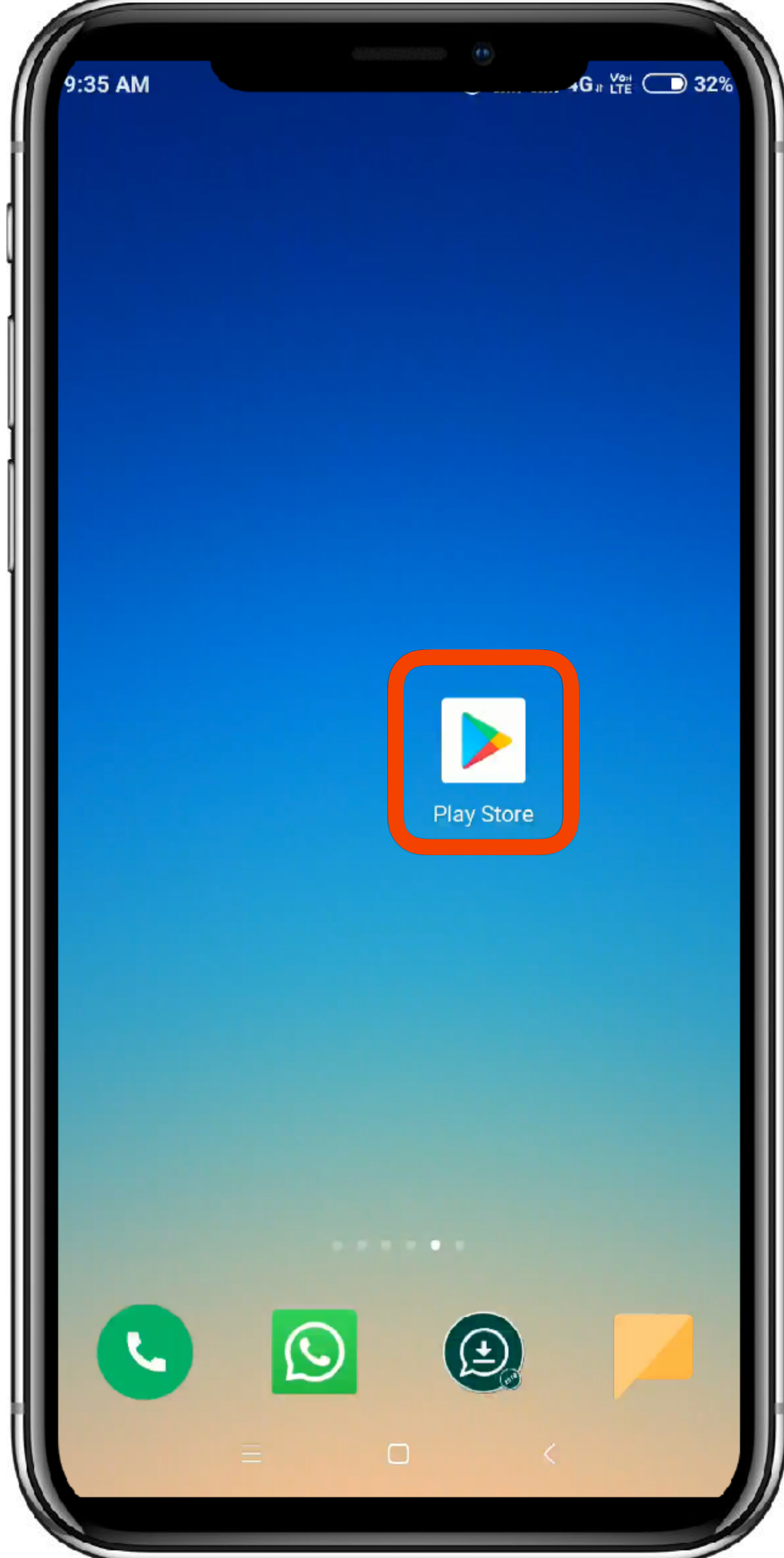
Part 1: Using Data CollectionZ App



LeadCon's
Data CollectionZ App
Lead Collector

Click on the Icon to get
to the Download link.



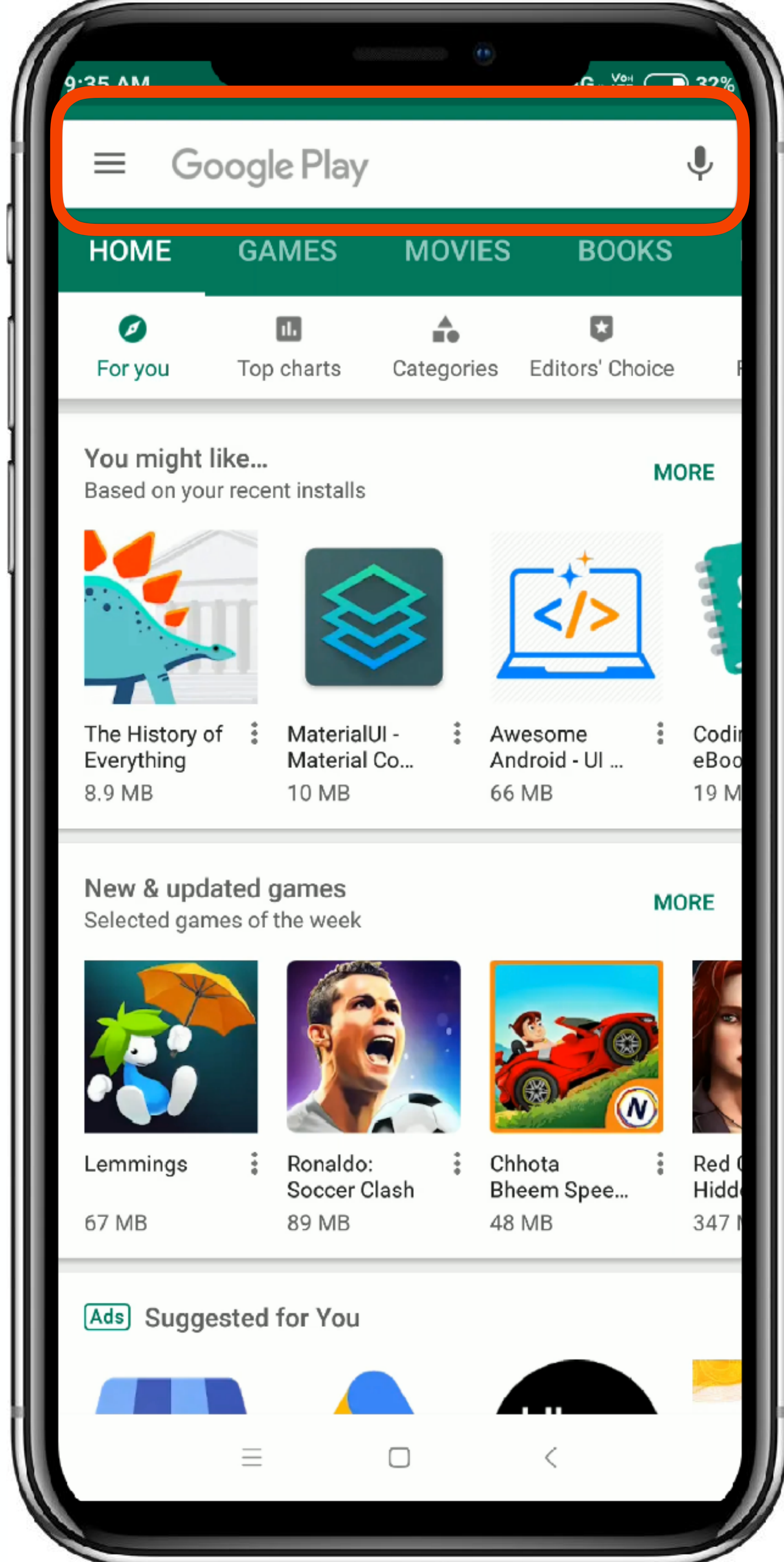


Step 1

To Download LeadCon Tools
Visit respective stores such
as,

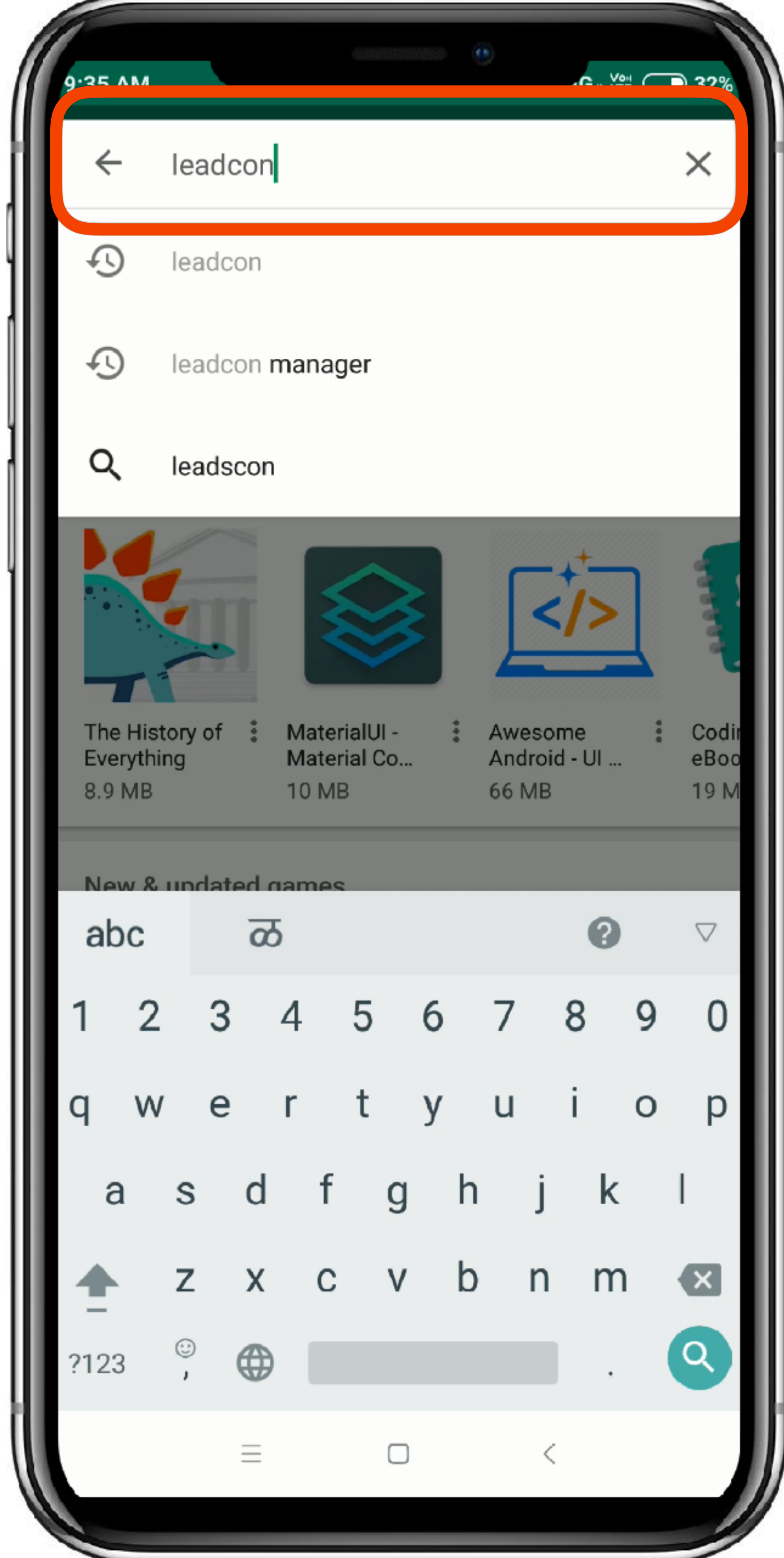
- AppStore
- PlayStore





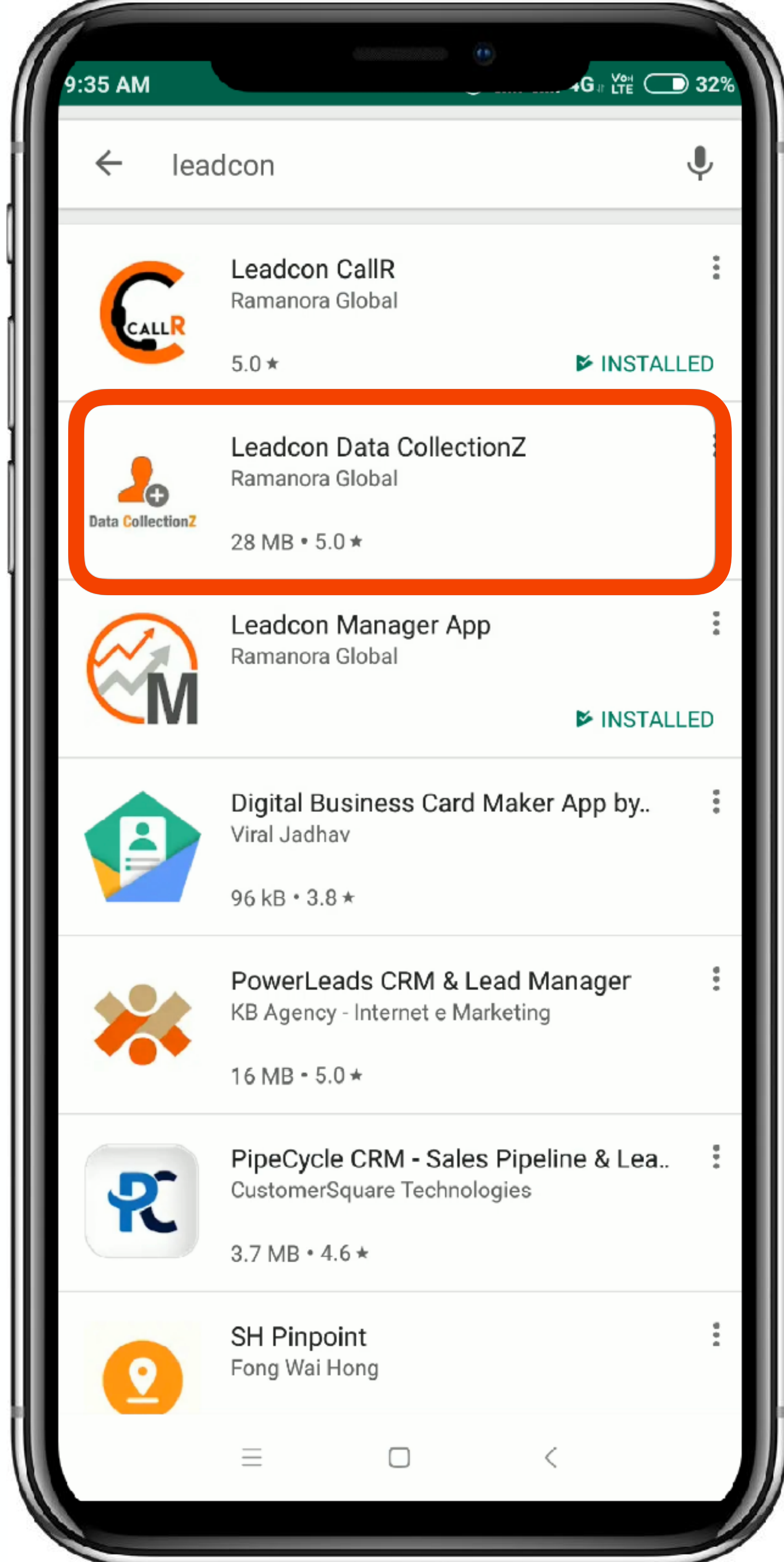
Step 2

Once you are at the Store go into your search window



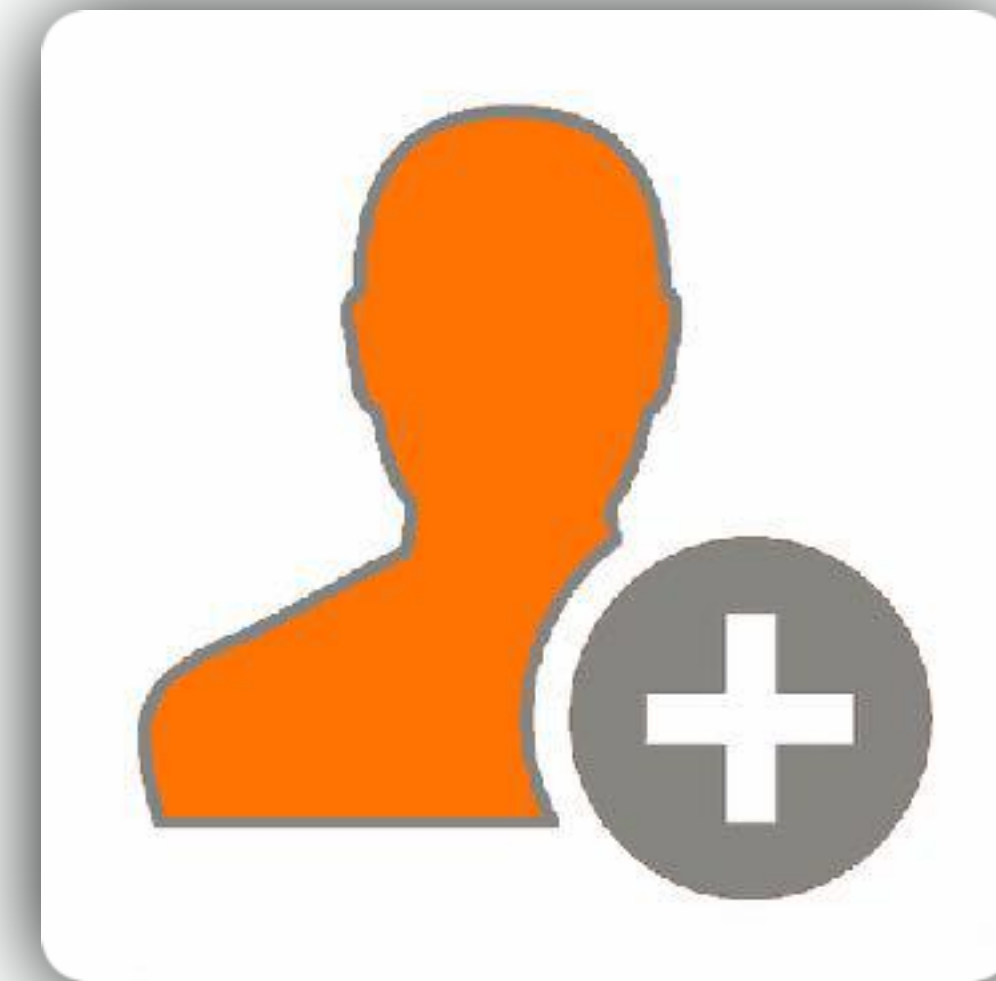
Step 3

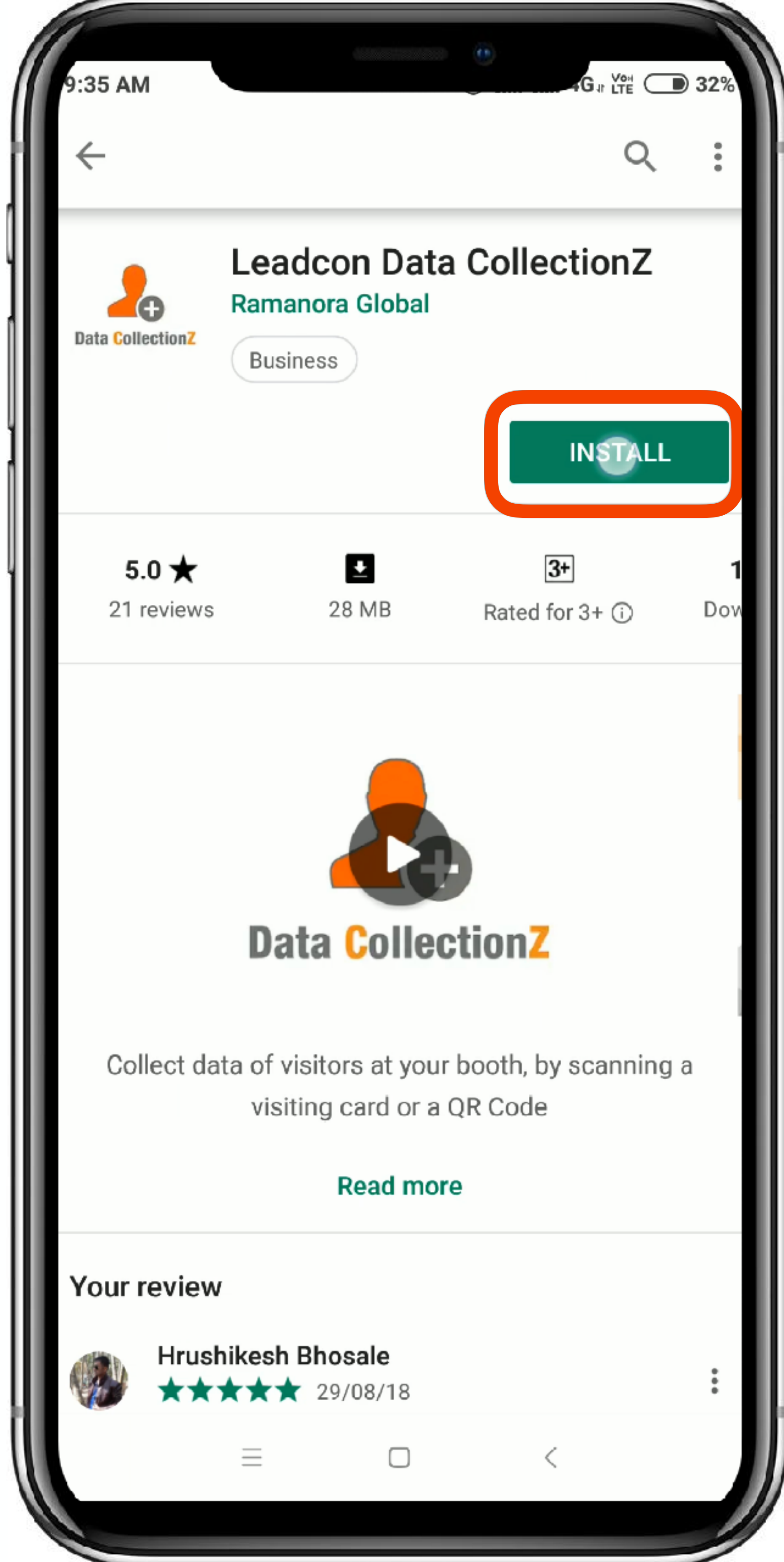
In your Search Window
search for
**'LeadCon Data
CollectionZ App'**



Step 4

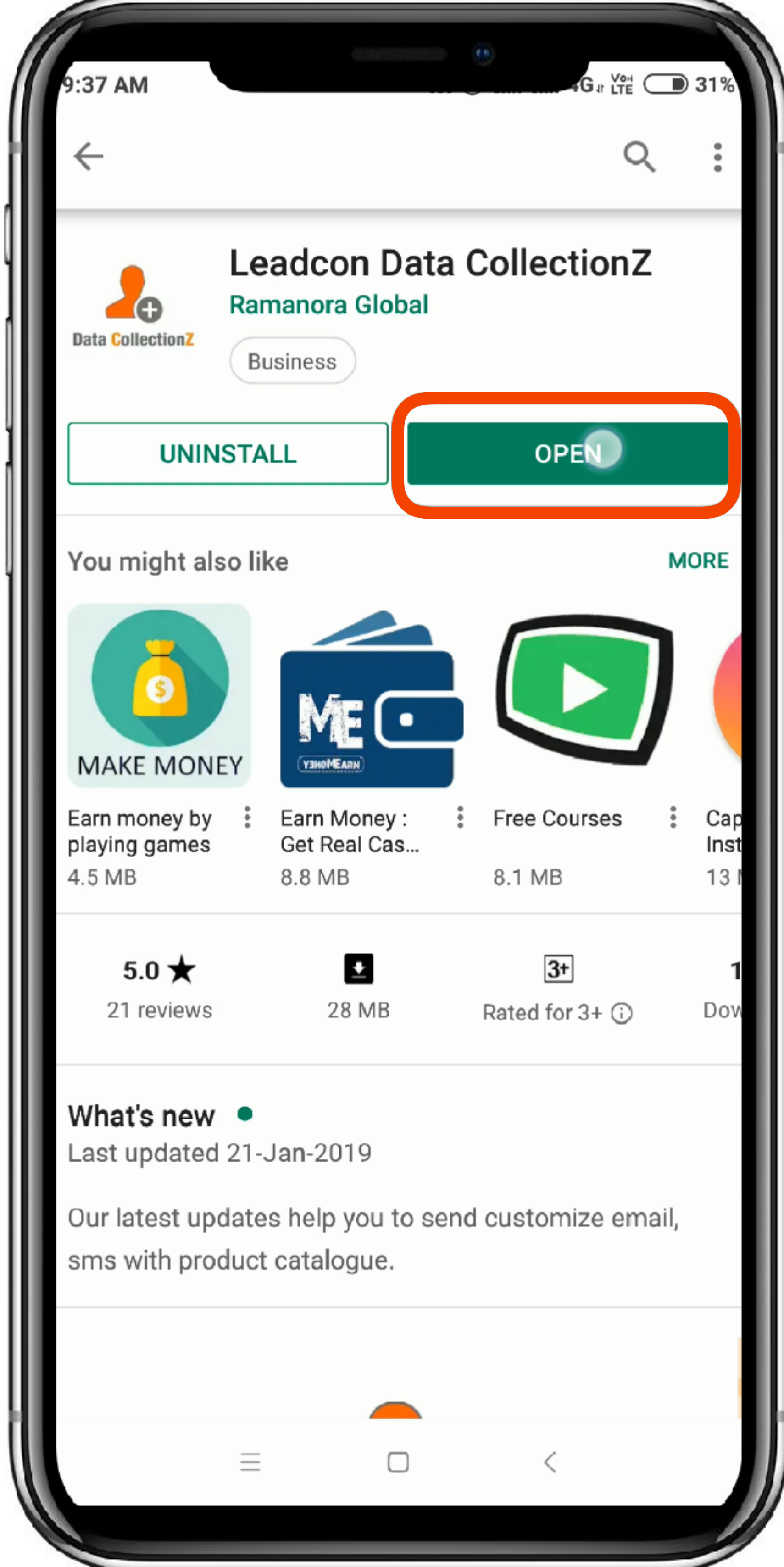
You can see the following icon to download the app





Step 5

Please Install the '**LeadCon Data CollectionZ**' App



Step 6

Once the Installation is complete
Click on **'Open'**



Step 7

Welcome to LeadCon's Data
CollectionZ App

11:25 AM 14%

Registration form

Please provide following information to get your demo key

Name
Enter Name

Organisation Name
Enter Organisation Name

Email Id
Enter Email

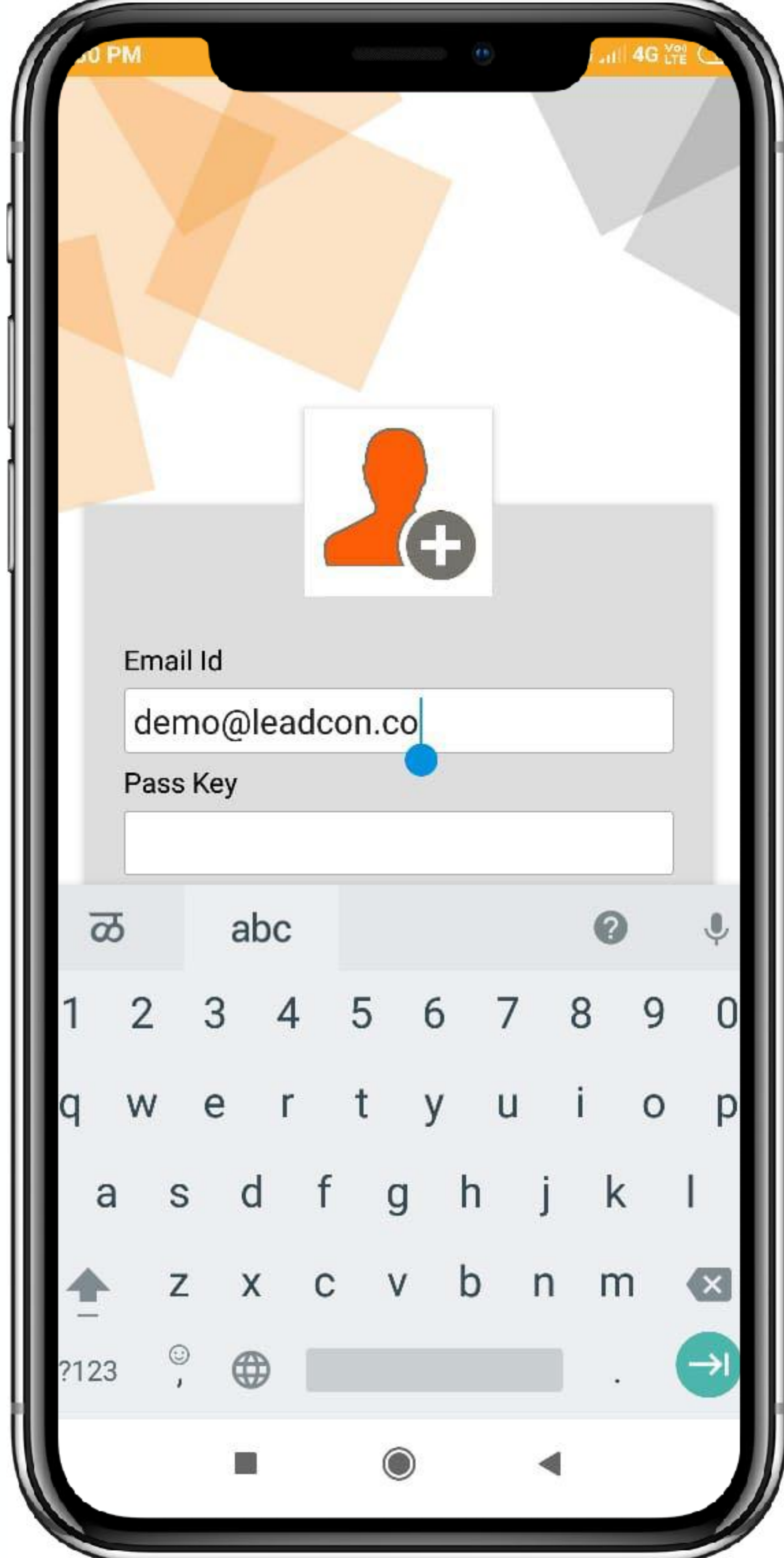
Mobile Number
Enter Mobile Number

GET OTP

Login

Step 8

In case your Login is created from the LeadCon platform, you can directly login using the given credentials.



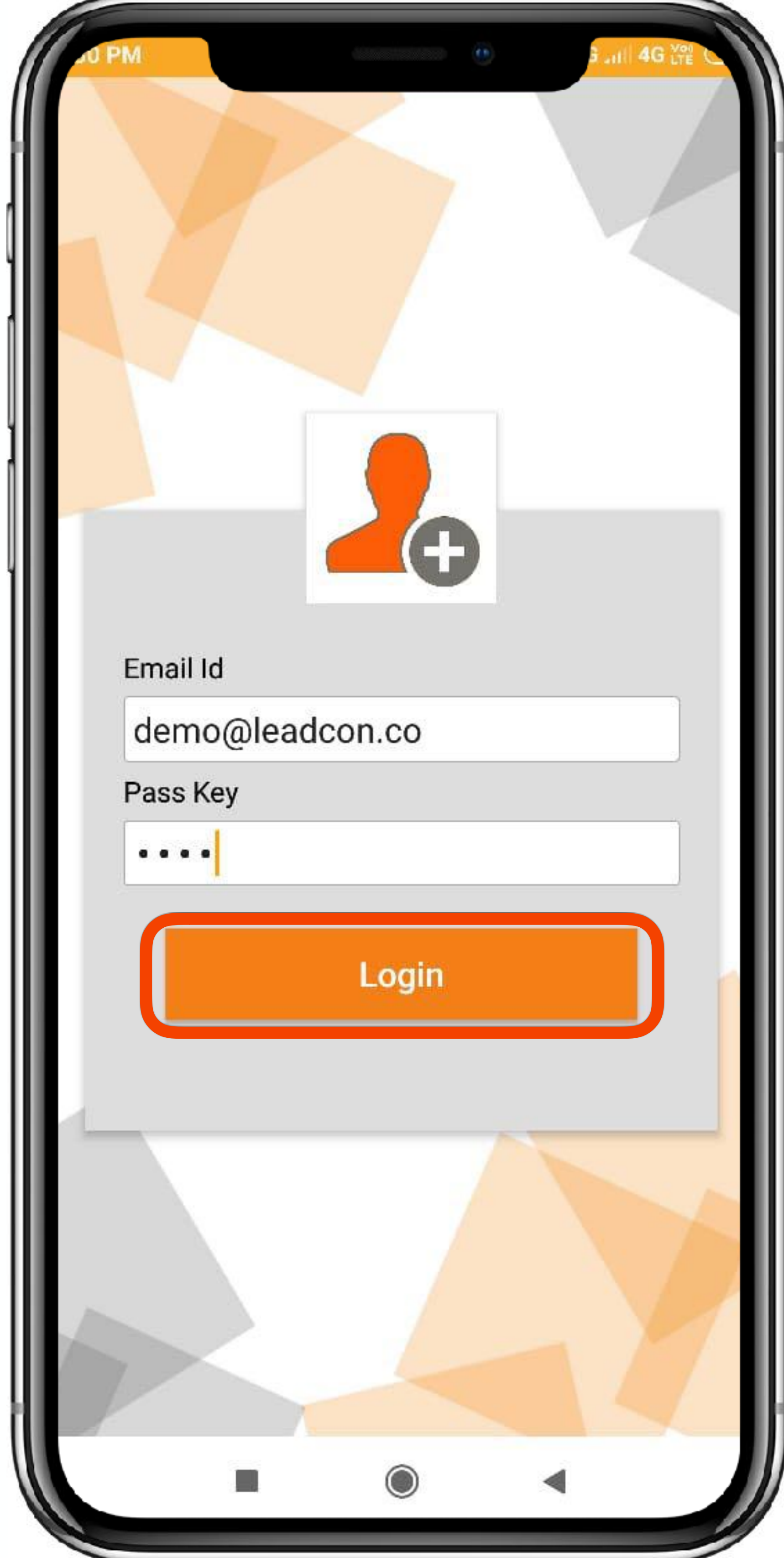
Step 9

In case your Login is created from the LeadCon platform, you can directly login using the given credentials.

If its the Demo you are accessing, you can Login using the following Credentials

ID: demo@leadcon.co

Pass key: demo



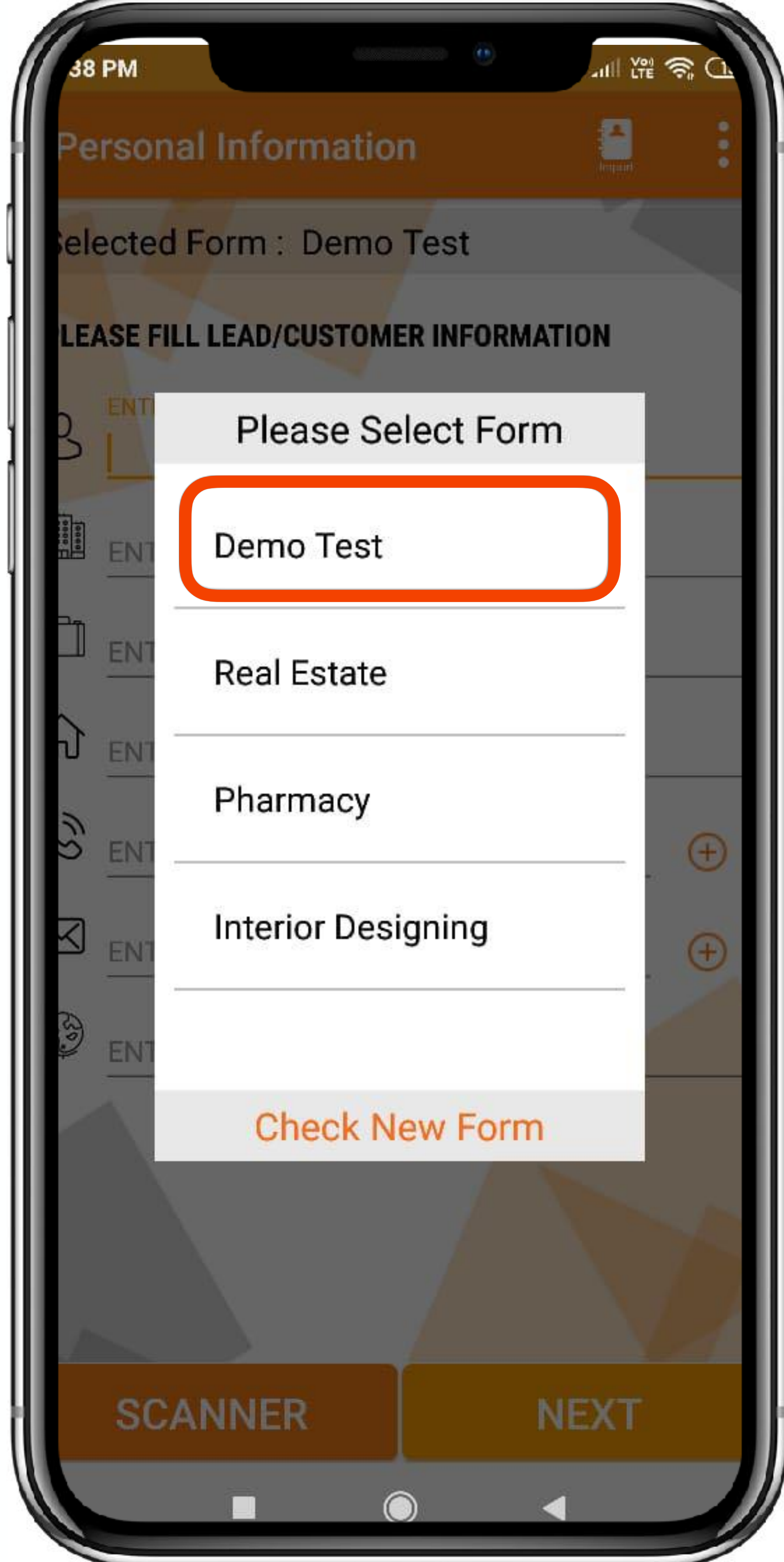
Step 10

Once necessary details are added, Click '**Login**'



Step 11

Once you have Logged In, you can click on '**Capture New**' to capture a **new Lead**.



Step 12

Firstly you Need to select a form in which you want to capture a Lead Into. These forms can be created by the manager in the Admins portal which can be accessed on <https://leadcon.co/>

For Demo, you can click on the '**Demo Test**' form we have created.

11:25 AM 14%

Personal Information

Selected Form : IMTEX 2019 Inquiry

PLEASE FILL LEAD/CUSTOMER INFORMATION

ENTER NAME

ENTER ORGANIZATION NAME

ENTER DESIGNATION

ENTER ADDRESS

ENTER CONTACT NUMBER1

ENTER EMAIL ID1

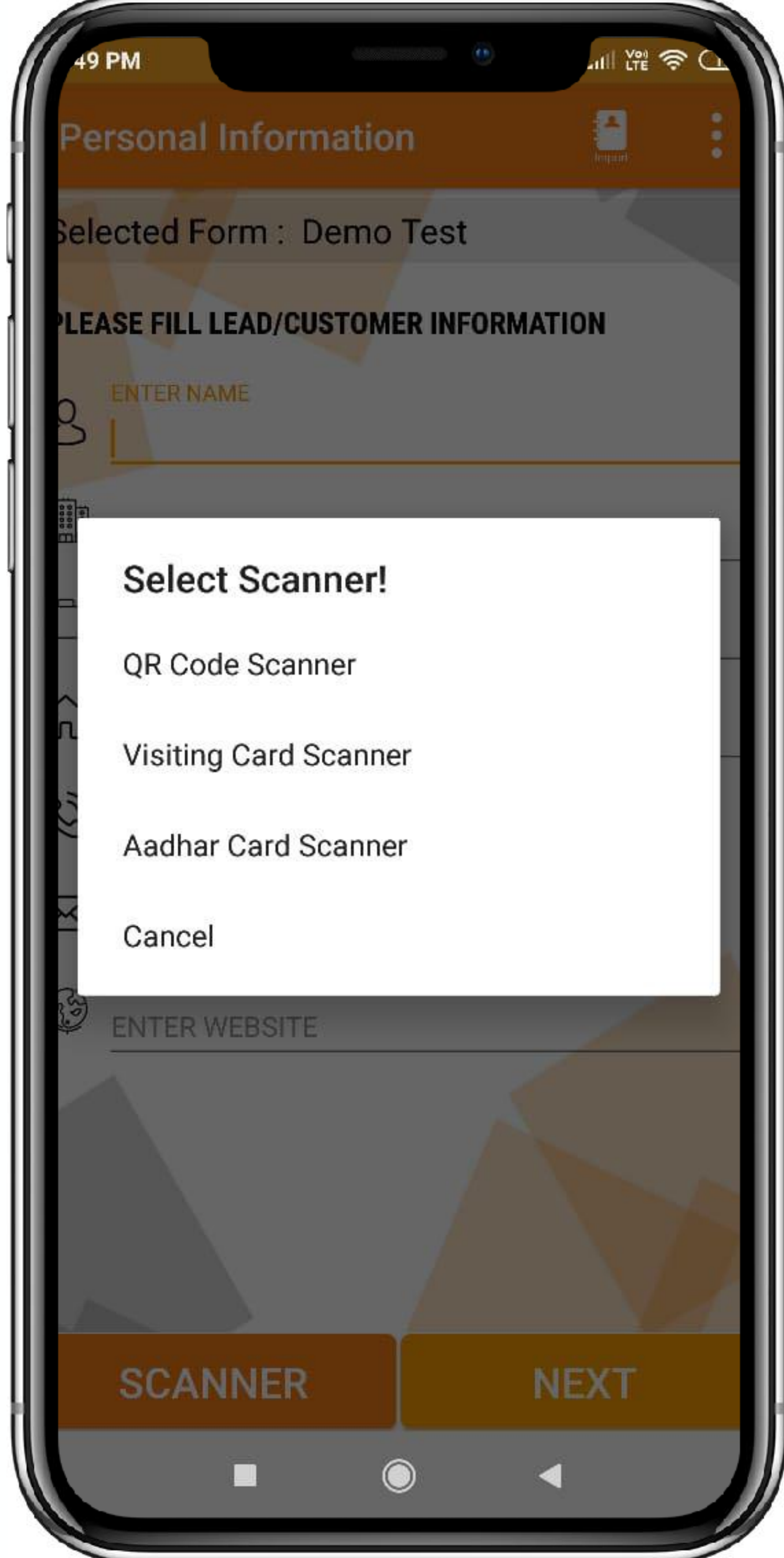
ENTER WEBSITE

SCANNER NEXT

Step 13

For the purpose of '**Demo**' we are going to add the Personal Details manually.

Click on the 'Name section' to add Name of the Lead/Prospect



Additional Information

You can capture the Lead in 5 different ways.

Watch: https://www.youtube.com/watch?v=7_Wy_p_pelk&t=

11:25 AM 13%

Personal Information

Selected Form : IMTEX 2019 Inquiry

PLEASE FILL LEAD/CUSTOMER INFORMATION

ENTER NAME
PRASAD GANPULE

ENTER ORGANIZATION NAME
RAMANORA GLOBAL Pvt. Ltd.

ENTER DESIGNATION

ENTER ADDRESS
Flat no 15, A Wwg, 4th floor, Krishnai CO- Piex, above

ENTER CONTACT NUMBER1
+919767176377

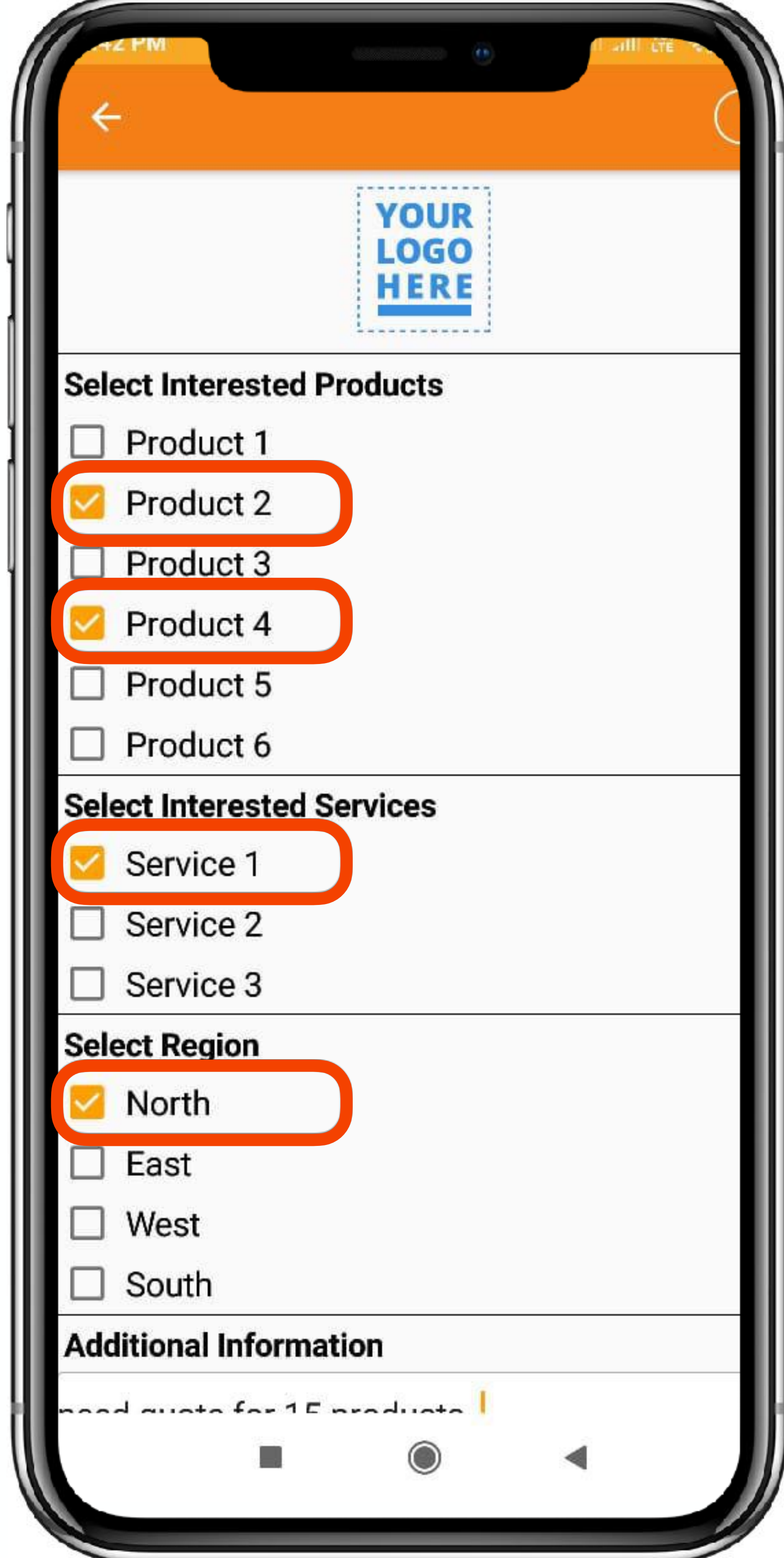
ENTER EMAIL ID1
prasad@ramanoracom

ENTER WEBSITE
www.ramanora.com

SCANNER NEXT

Step 14

Once you have filled the **Personal Information**, click '**Next**' to fill up the Custom form.

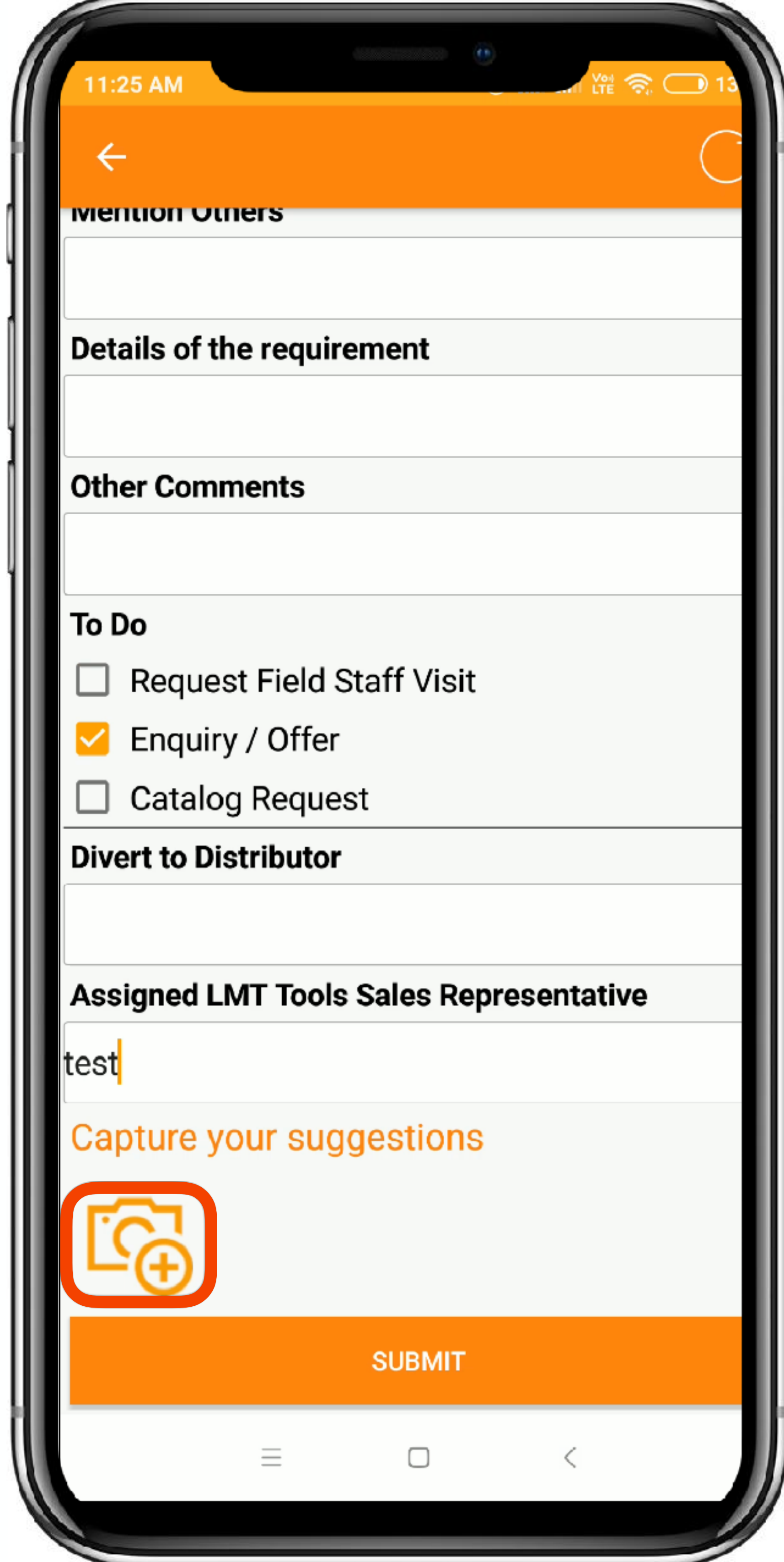


Step 15

On the next page, it will open the **Custom Form** which is built from the Admins portal

In the Form, you can add all the different questions you may ask your prospects to ensure you have the right information for the leads.

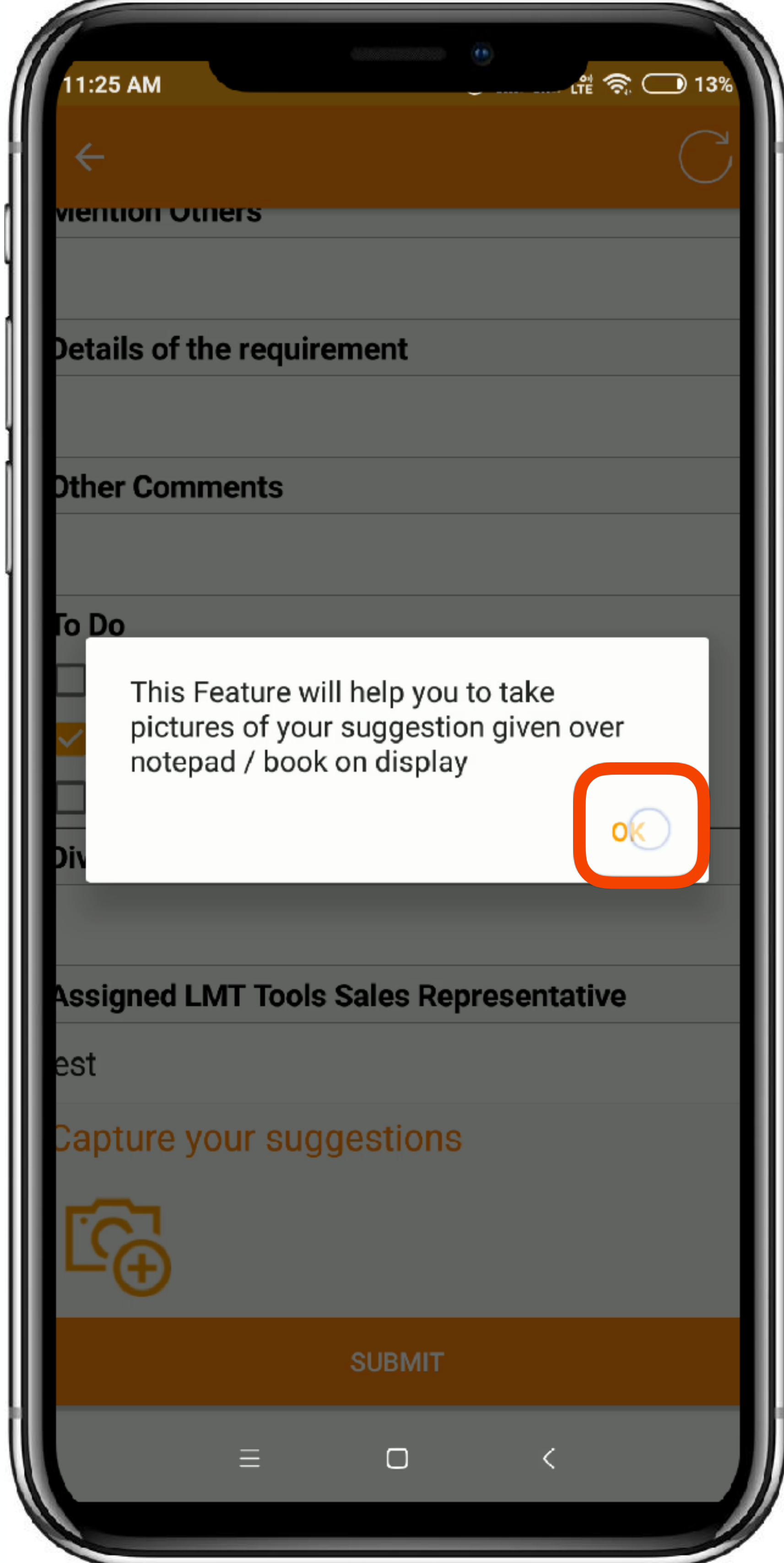
You can select the multiple options and also add the relevant ones.



Step 16

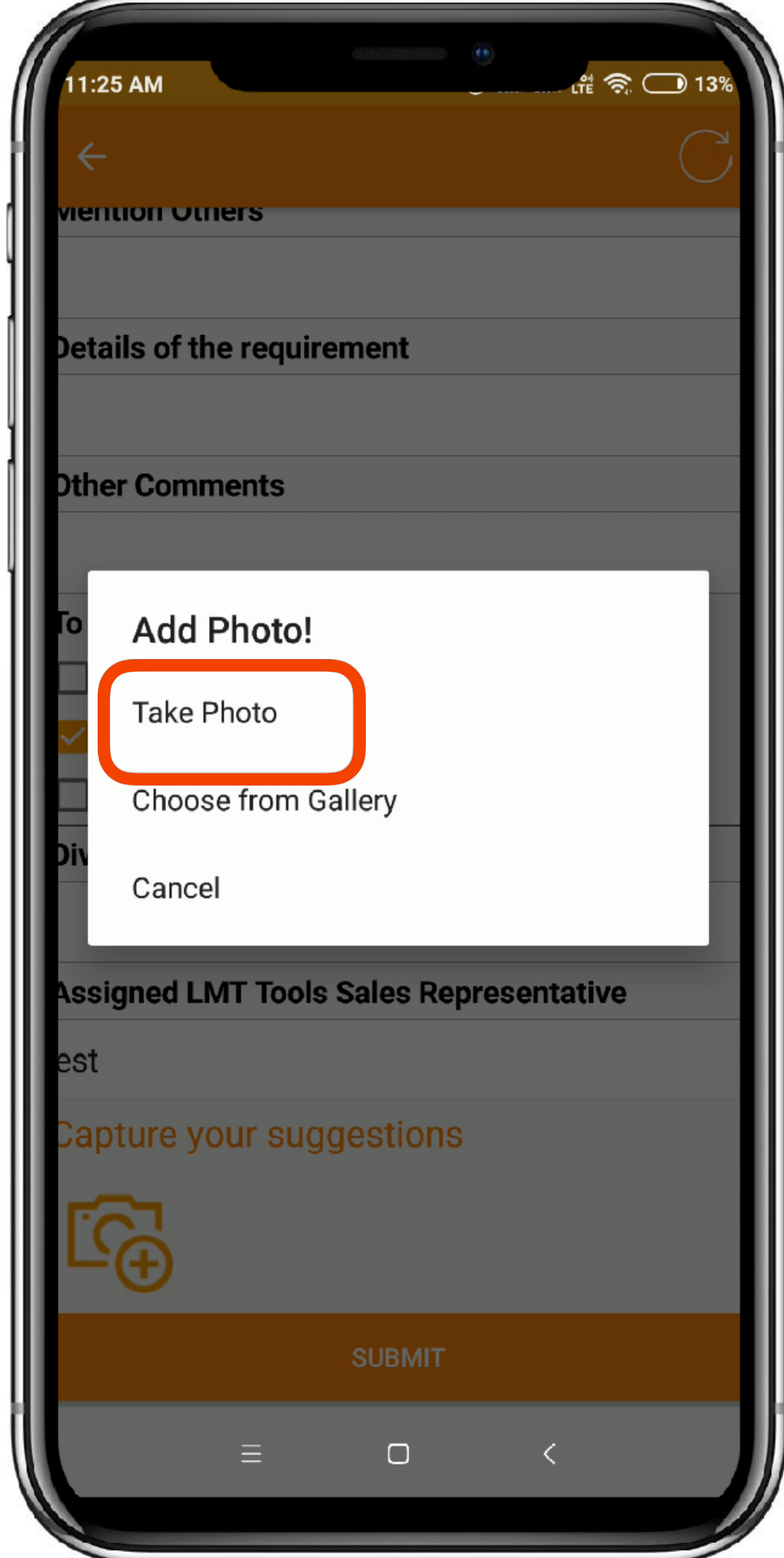
In the LeadCon Data CollectionZ App, you can also capture the notes/ suggestions that you might have taken down while having discussions and want to keep a track for a later use.

Click on the **Camera Icon** to activate the notes capture tool.



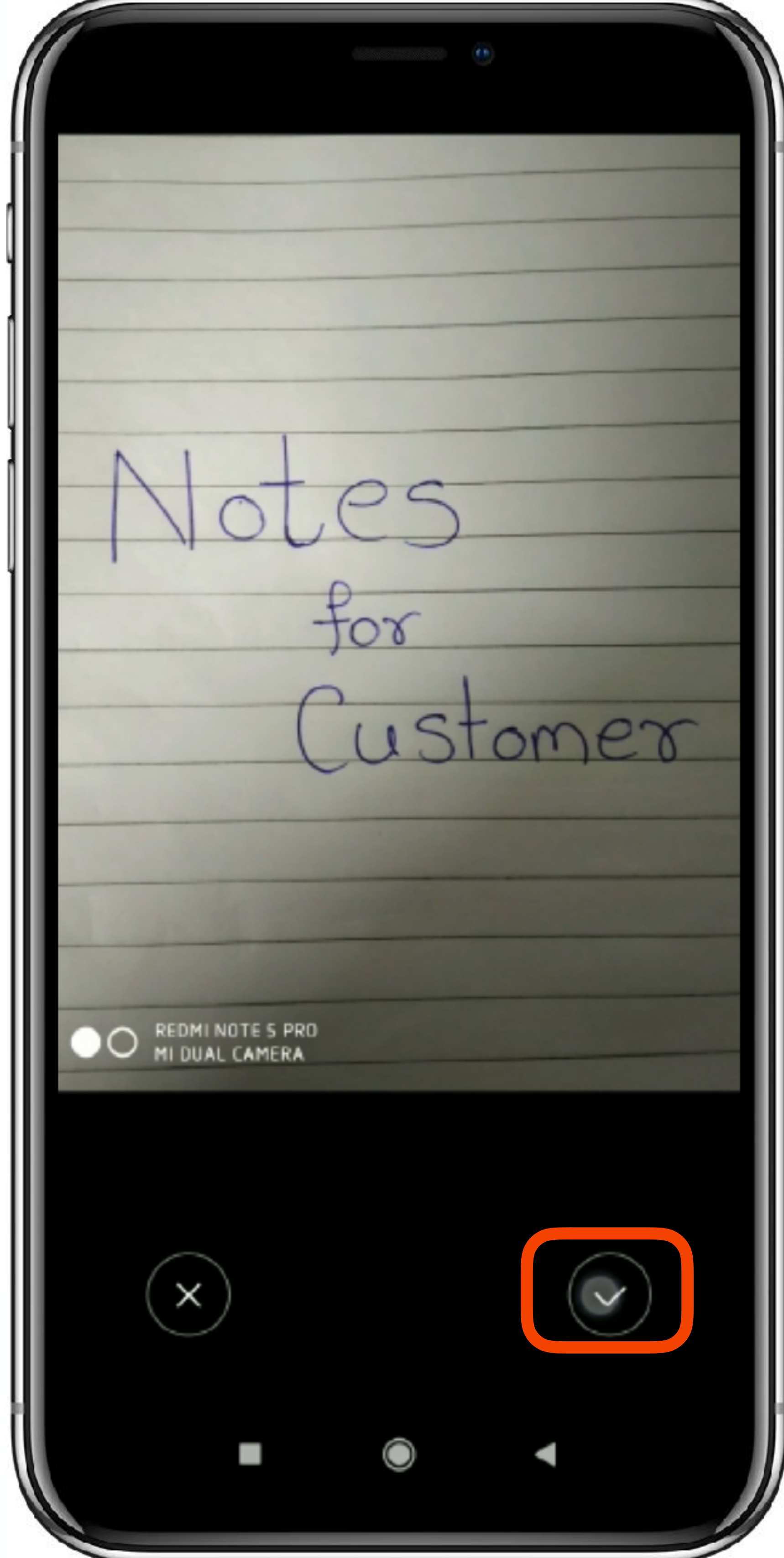
Step 17

Click '**Ok**' to open camera



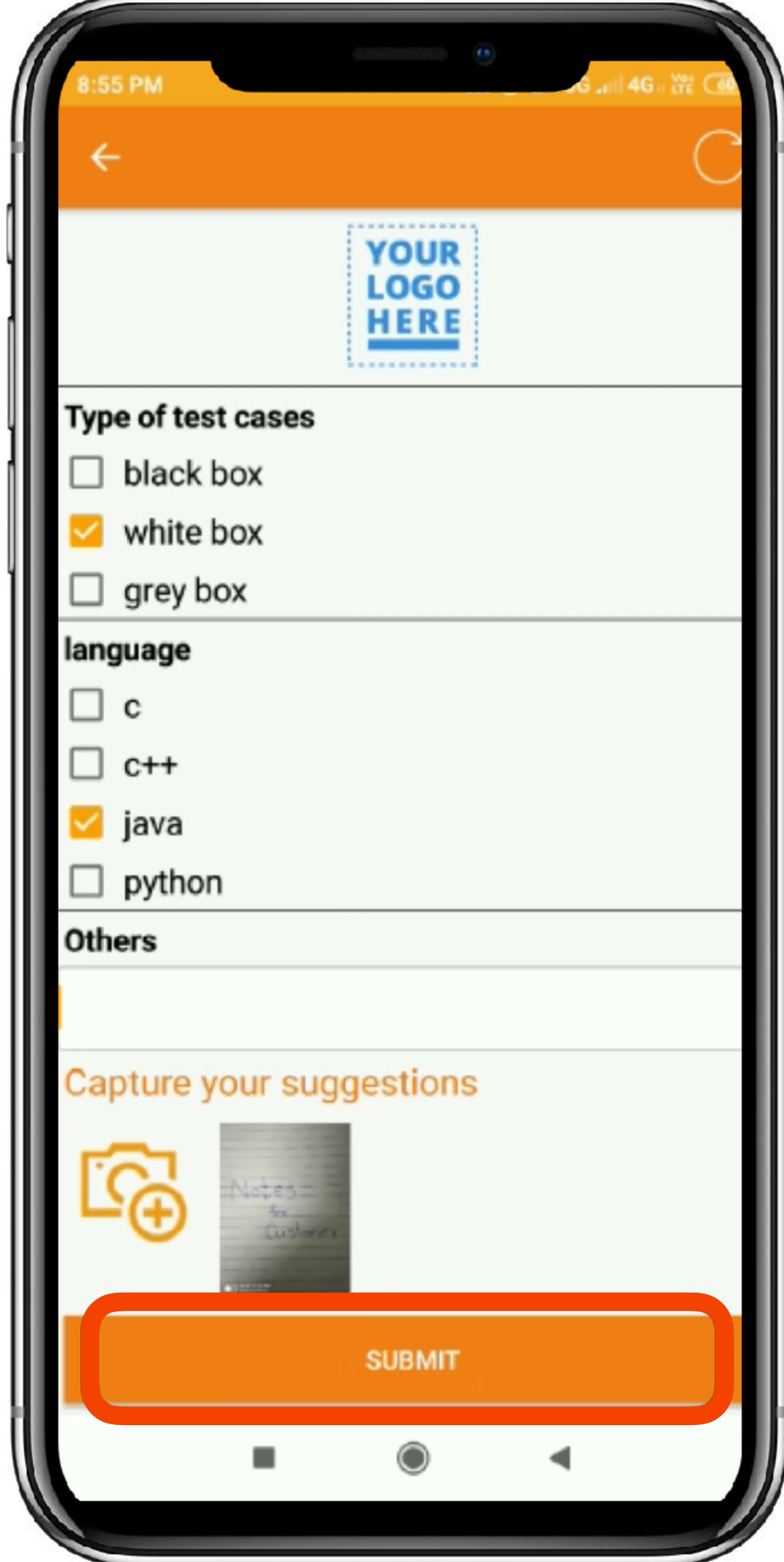
Step 18

You can either take a new photo or even choose from library



Step 19

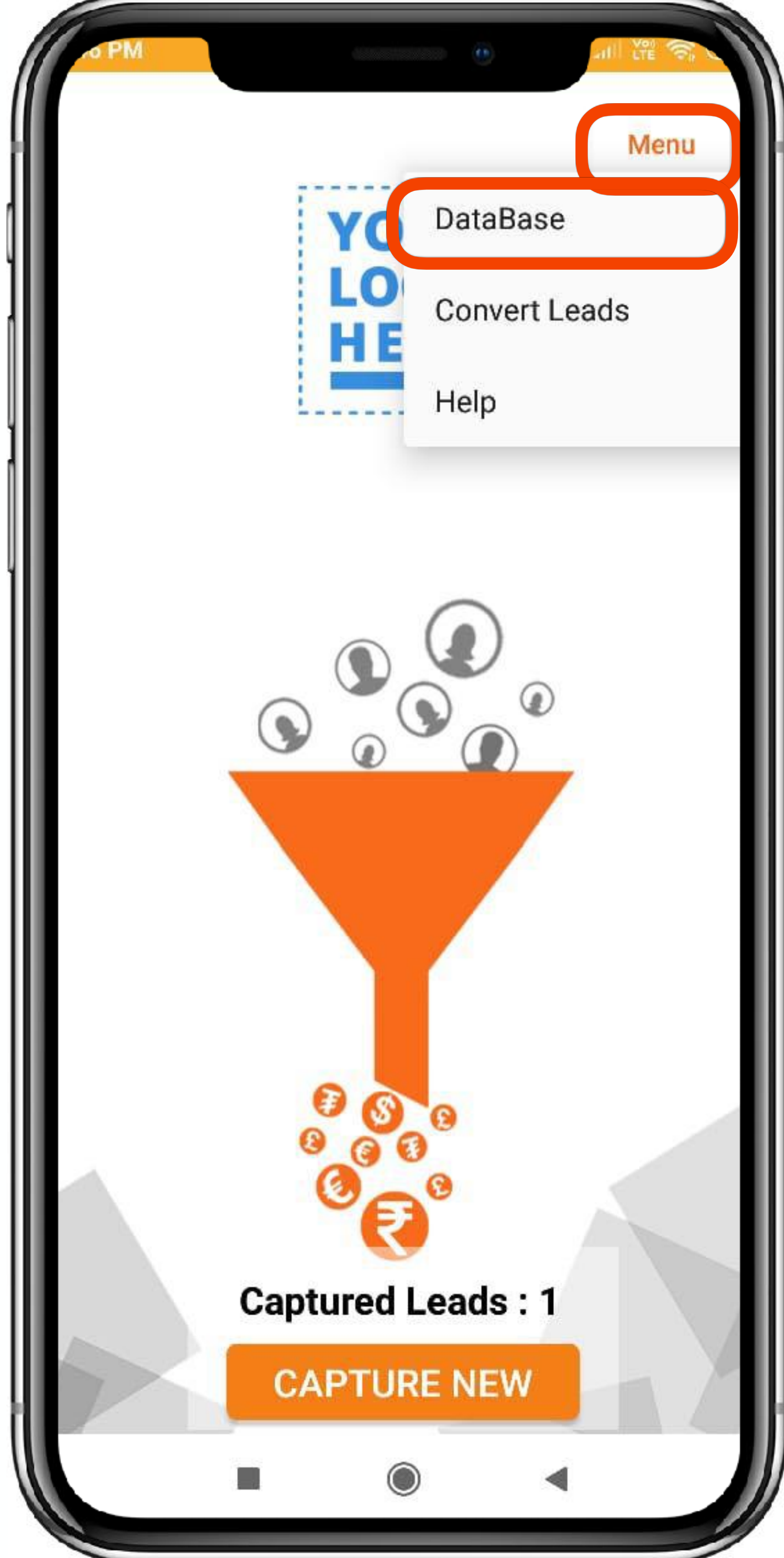
Once you have taken the Picture, click on the **'Ok'/'Tick'** to confirm the picture.



Step 20

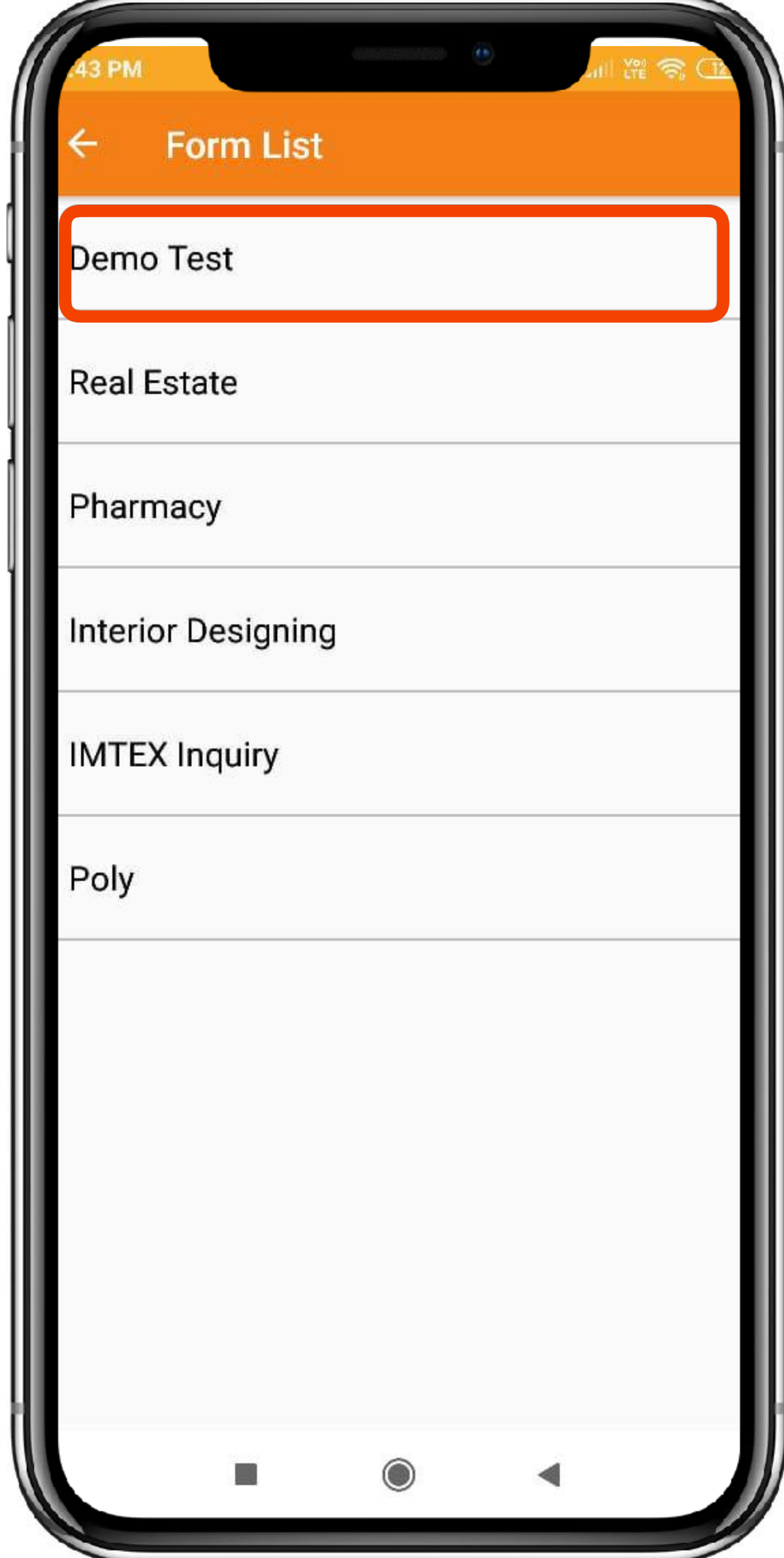
Once confirmed, you can see the taken picture attached in the '**Capture your Suggestions**' section.

And Click on '**Submit**' to confirm submission of the 'Lead'



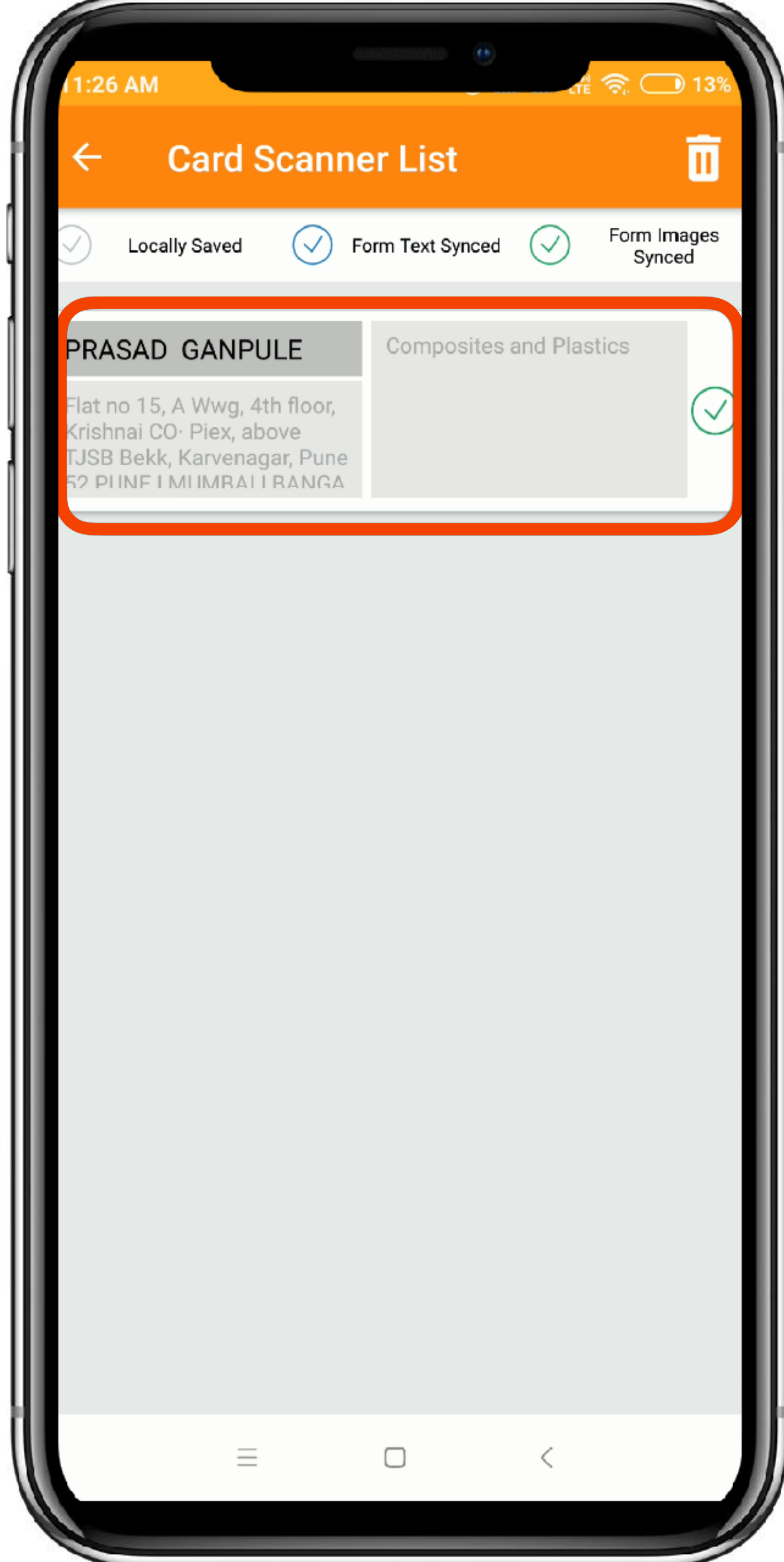
Step 21

To view your captured
'Lead',
Click on '**Menu**'
Click on '**Database**'



Step 22

Click on the '**Form Name**' that you have captured a lead into

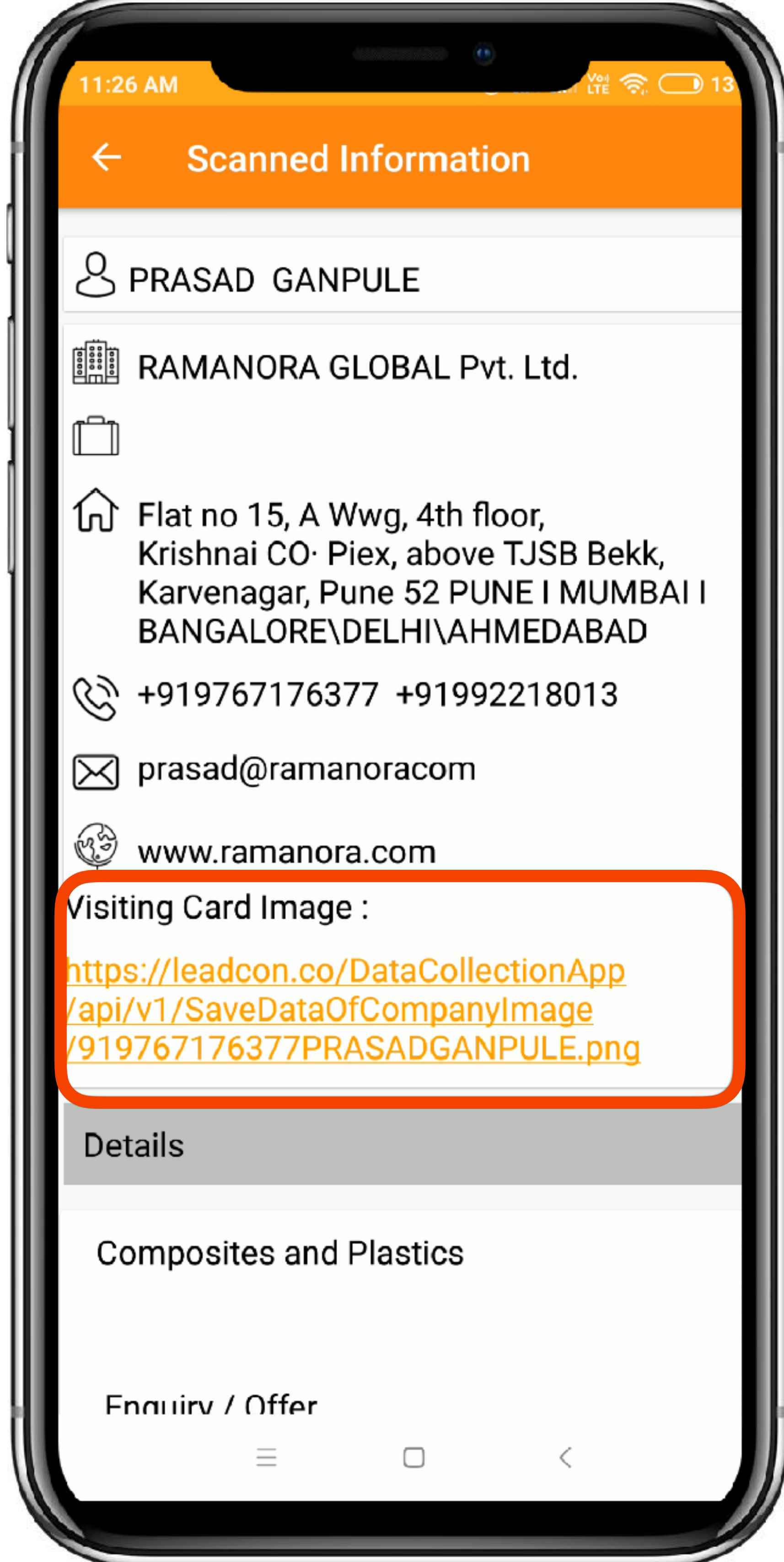


Step 23

You shall see the recently captured Lead on the top.

LeadCon's Data CollectionZ App is the first app, which saves all your captured leads offline and once you are in internet connectivity you can sync the data with the servers ensuring safety and security of your data.

Once synced, there is a Auto '**Thank You eMail and SMS**' which is delivered to the captured leads which can be activated from the Admins Portal.



Step 24

Once the data is synced, You can see all the details once you click further on the Lead.

If the Lead is synced with the server you can also see the visiting card image which was captured.

Part 1 Using Data CollectionZ App



Using LeadCon's Data CollectionZ App, we have now captured a new Lead into the system

You can capture lead in 5 different ways in DC App

1. QR Code Scanning
2. Visiting Card Scanning
3. Adhar Card
4. Import from Contacts
5. Manual Entry

Part 2 - LeadCon's CallR App

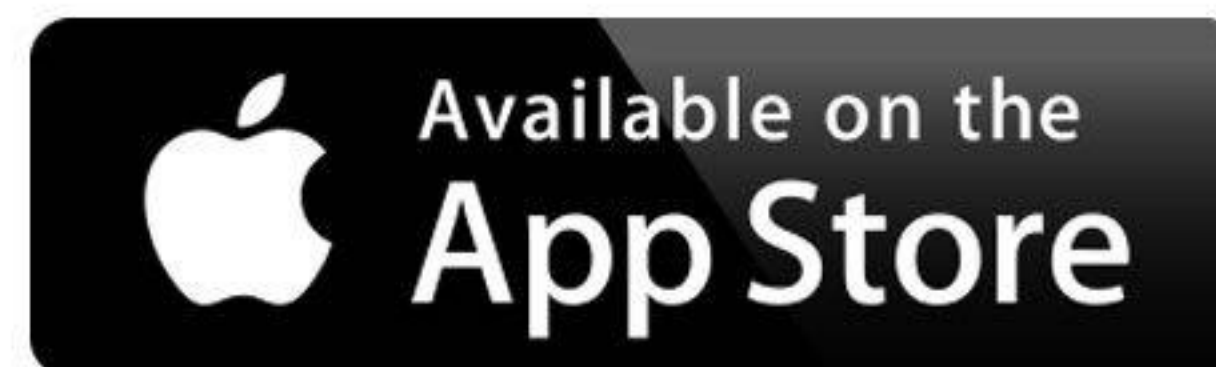


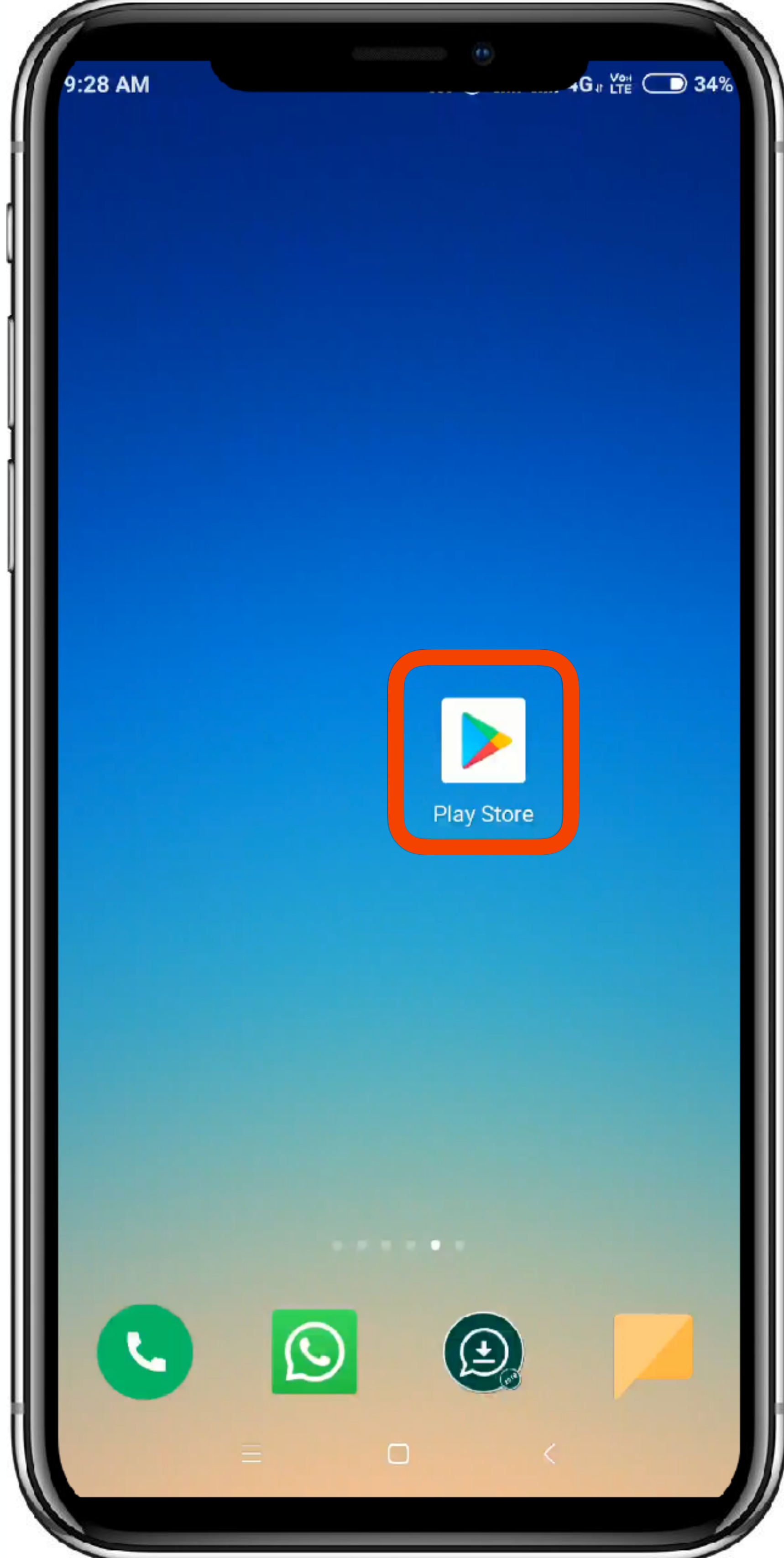
CallR App

Lead Converter

Capturing Leads is not Sales, but Converting Leads into Customers is Sales, That's where CallR App helps you to automate your complete sales followup, which is the only way you can get faster sales.

Click on the Icon to get to the Download link.



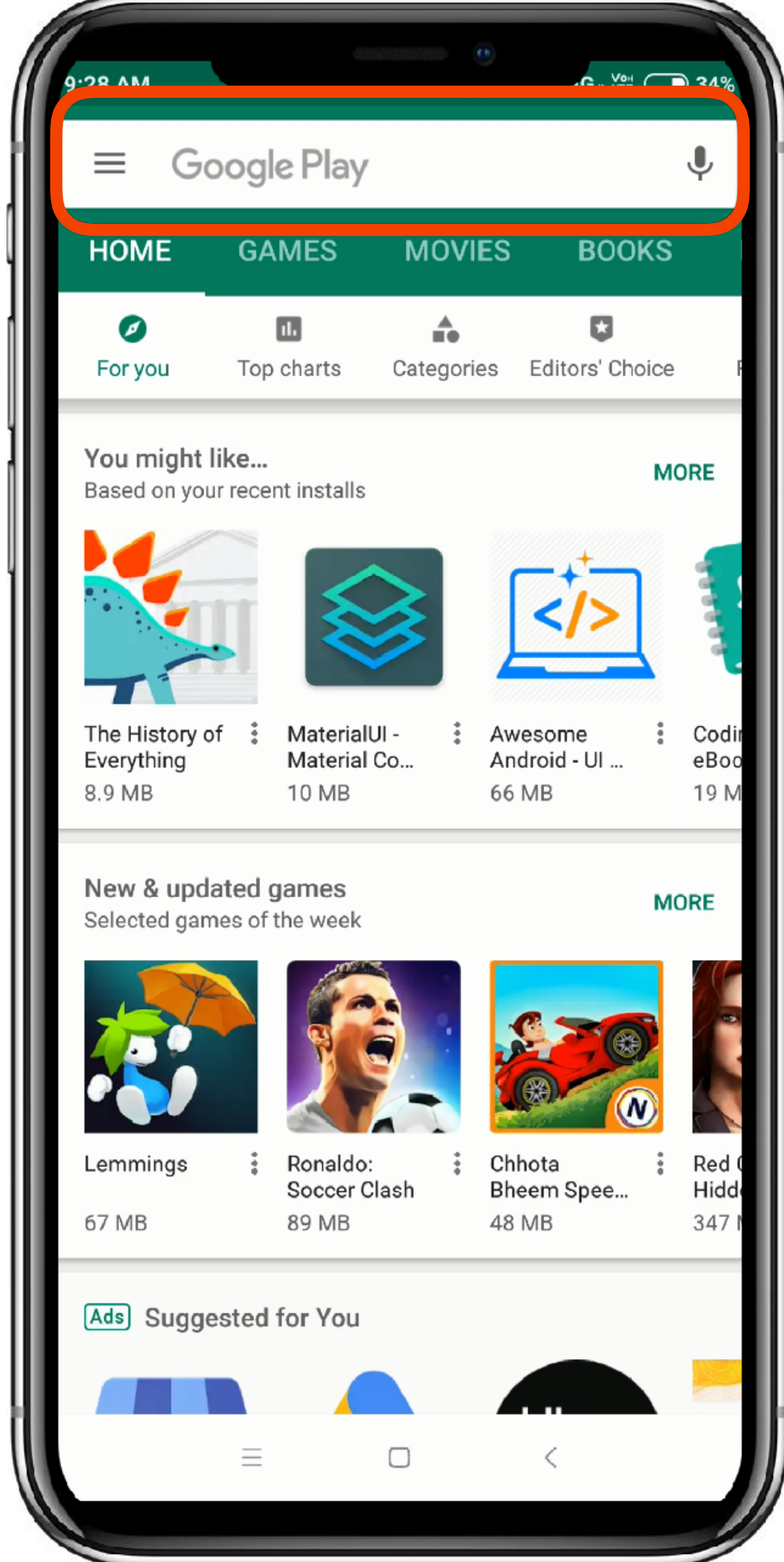


Step 1

To Download LeadCon Tools
Visit respective stores such
as,

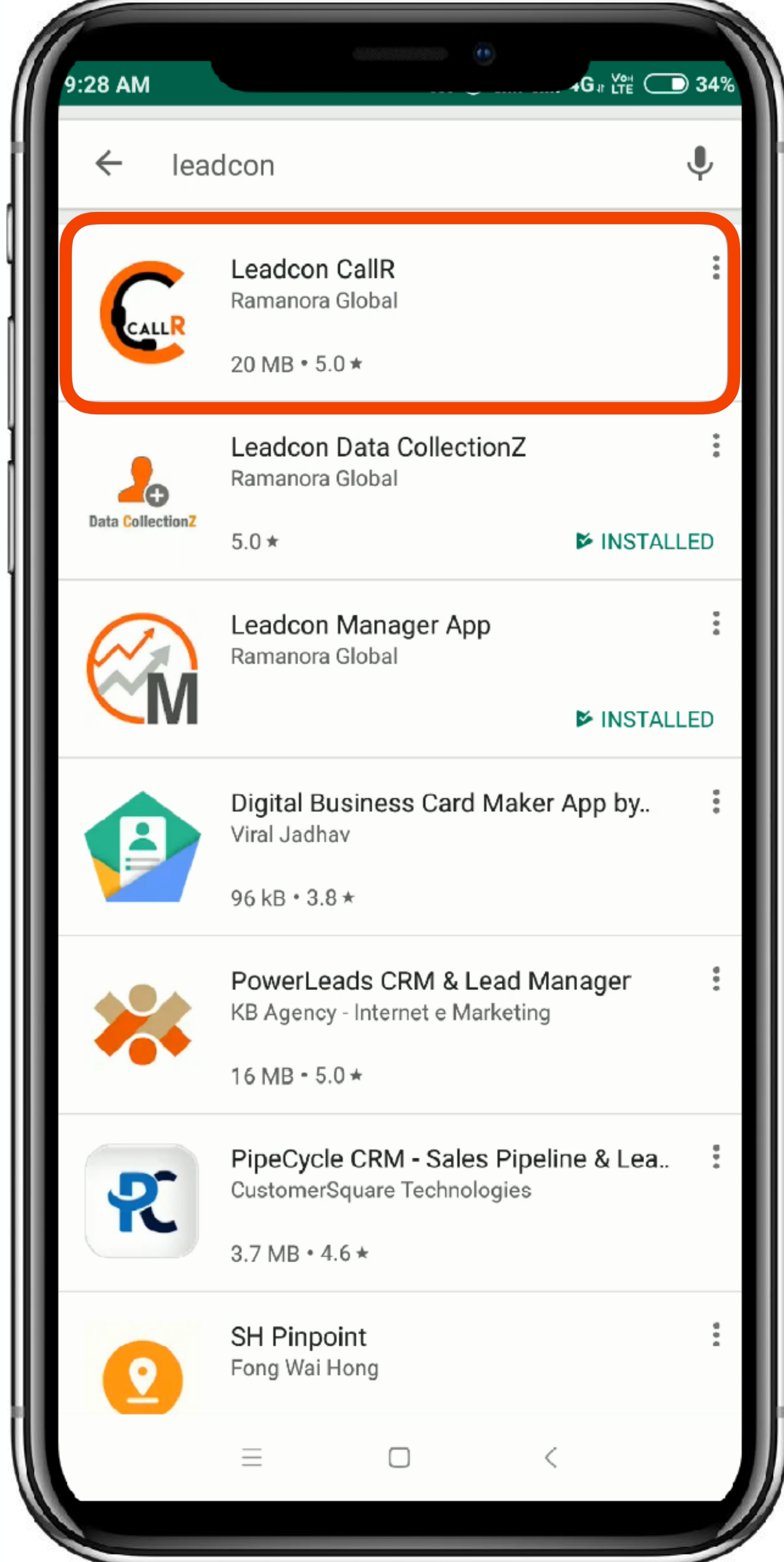
- AppStore
- PlayStore





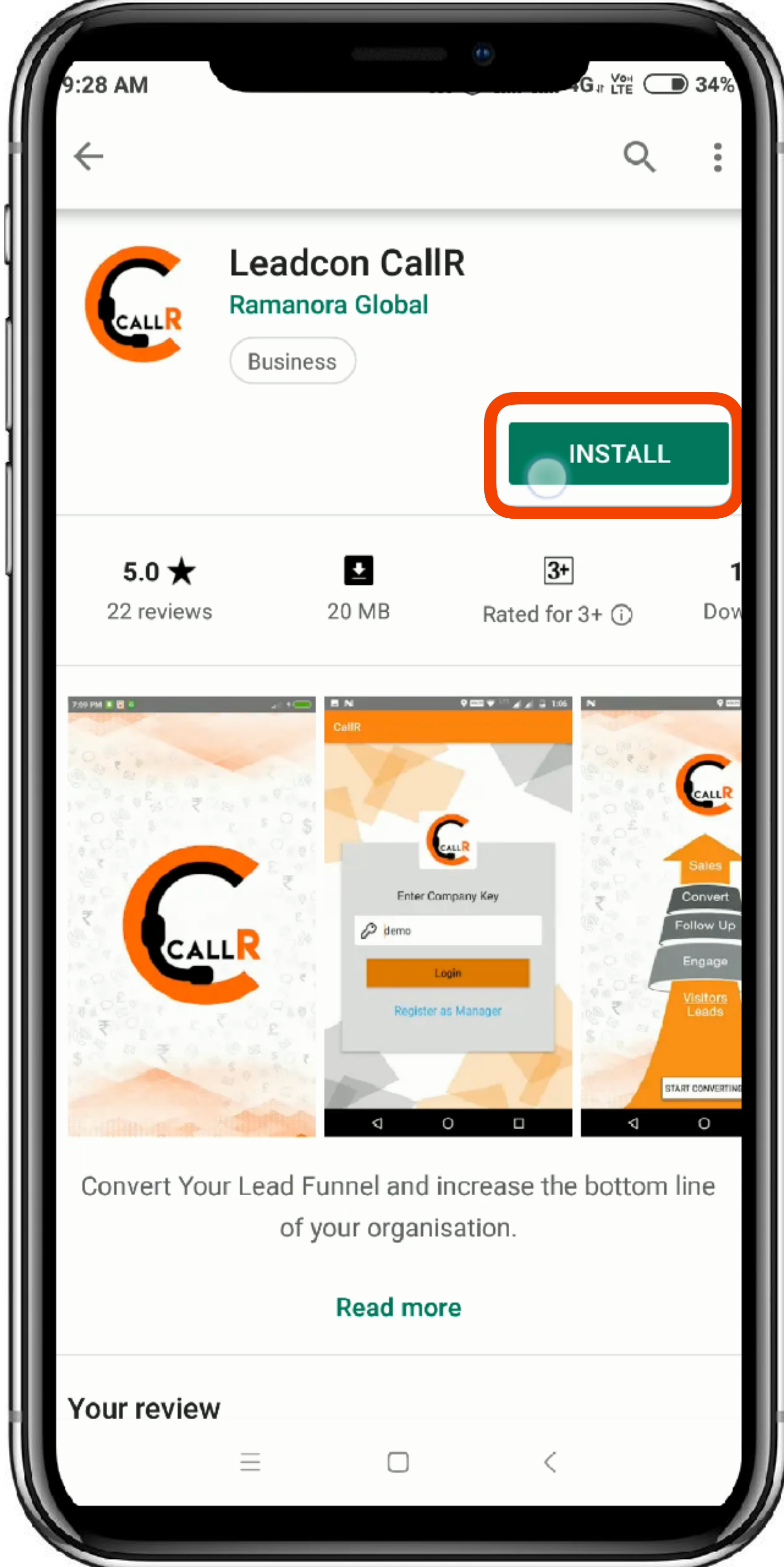
Step 2

Once you are at the Store go into your search window



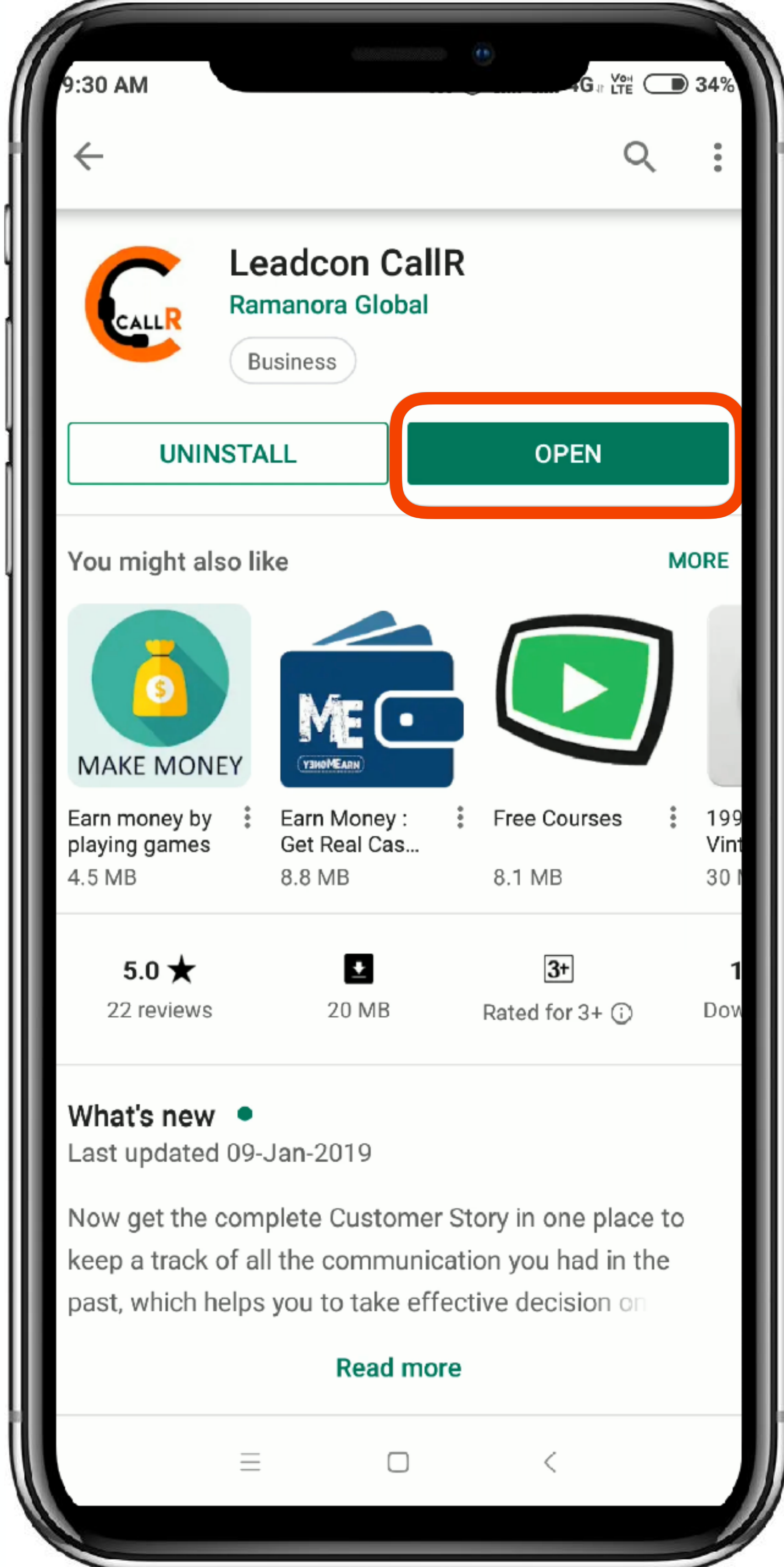
Step 3

In your Search Window
search for
‘LeadCon CallR App’



Step 5

Please Install the CallR App



Step 6

Once the Installation is complete
Click on **'Open'**



Step 7

Welcome to LeadCon's
CallR App

9:30 AM 4G LTE 33%

Registration form

Please provide following information to get your demo key

Name

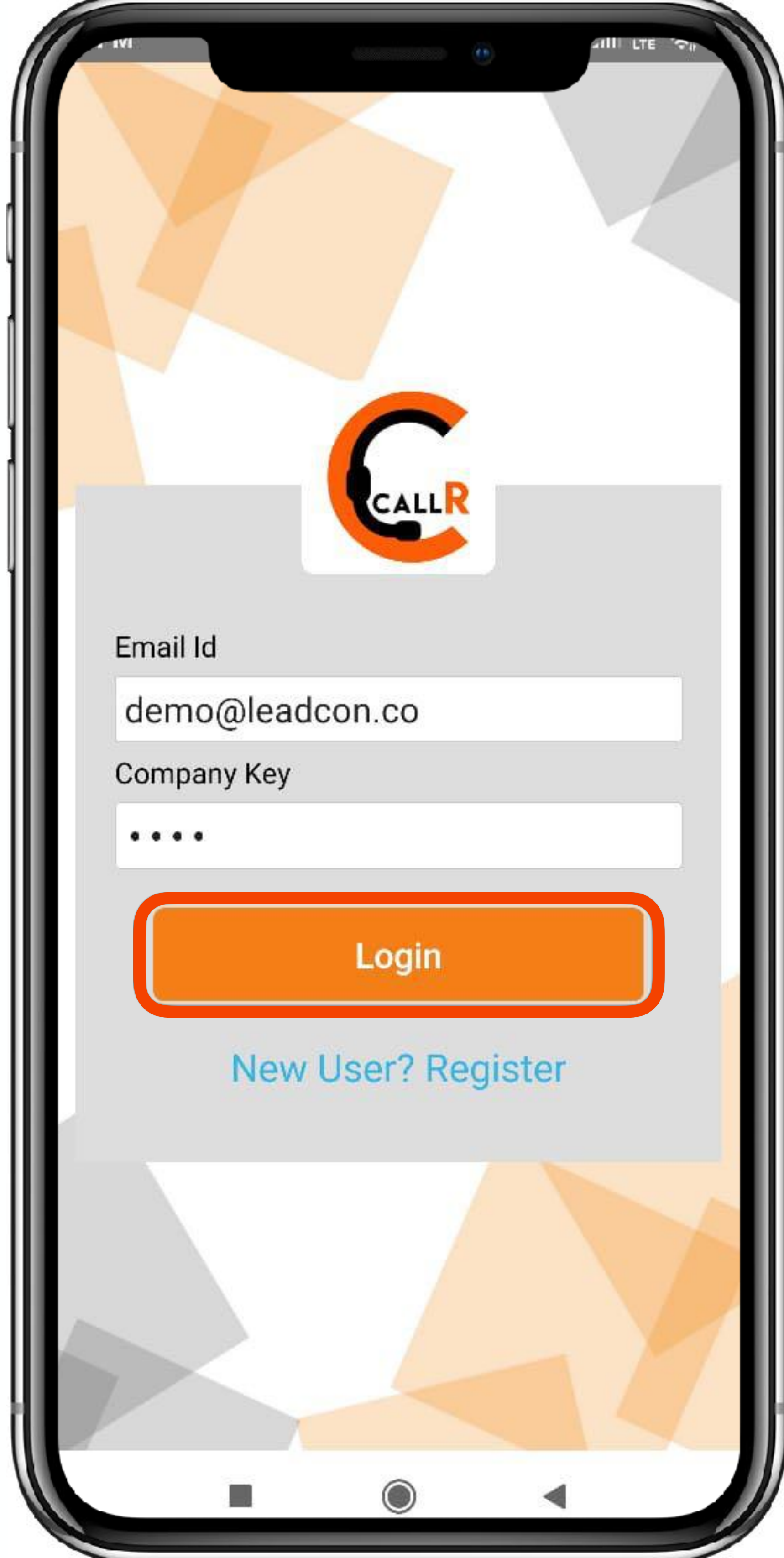
Organisation Name

Email Id

Mobile Number

Step 8

In case your Login is created from the LeadCon platform, you can directly login using the given credentials.



Step 9

In case your Login is created from the LeadCon platform, you can directly login using the given credentials.

If its the Demo you are accessing, you can Login using the following Credentials

ID: demo@leadcon.co

Pass key: demo



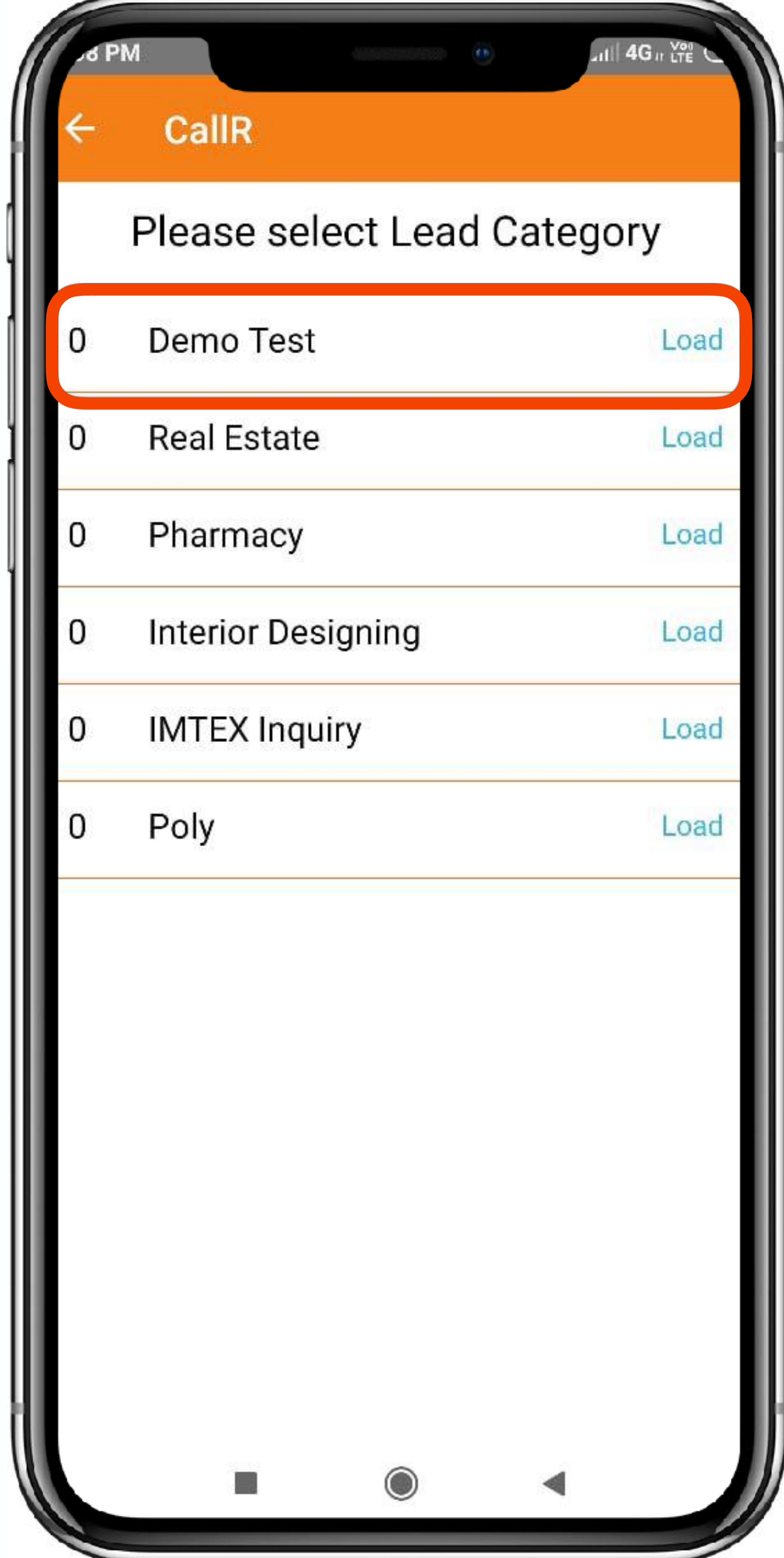
Step 10

Once you have Logged In, you can click on **'Begin Sales'** to convert captured Leads into Sales.



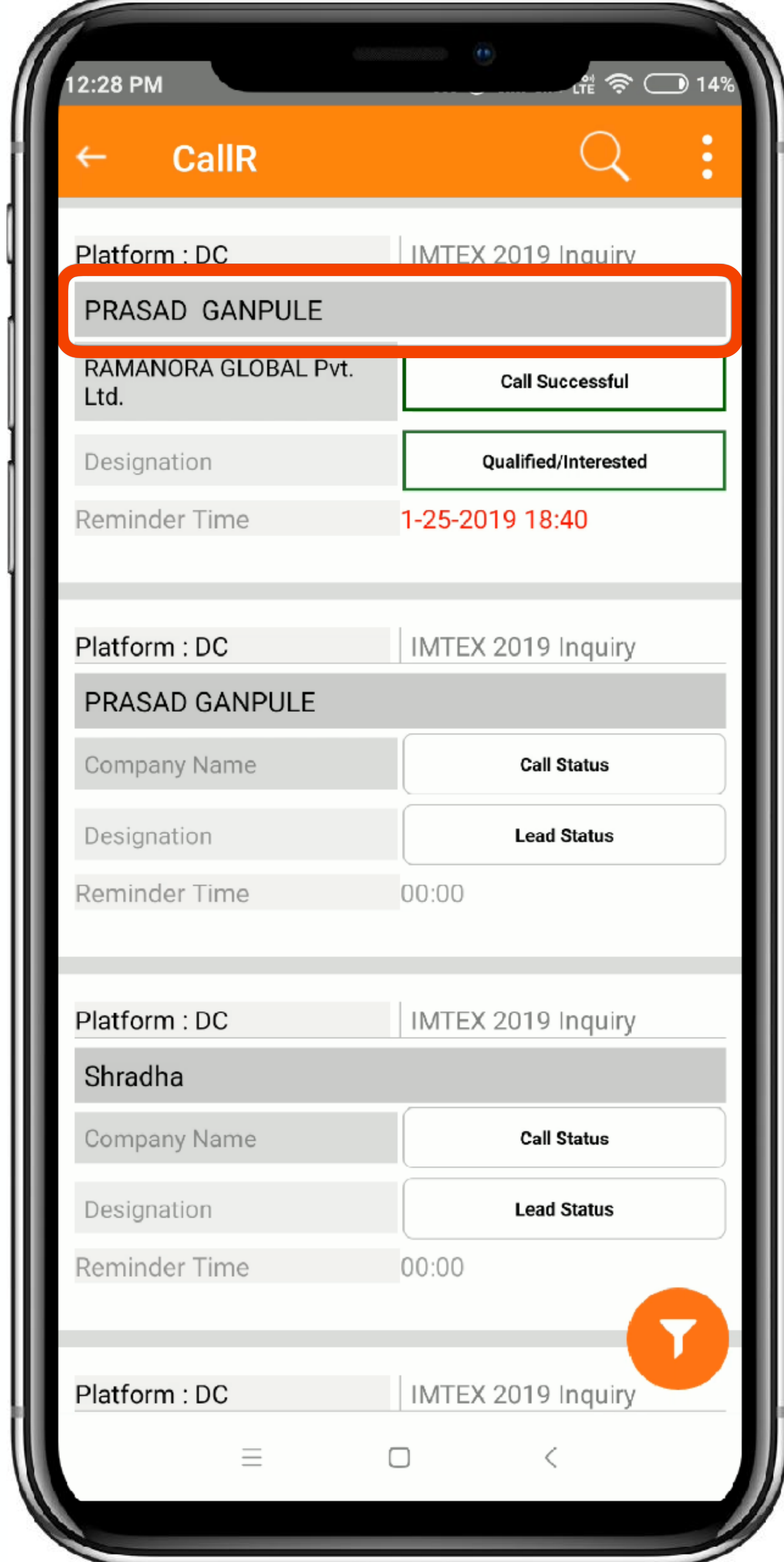
Step 11

To access the lead that was captured using the Data CollectionZ App Click on the DC section in CallR



Step 12

Choose the Inquiry form in which you have captured a lead.

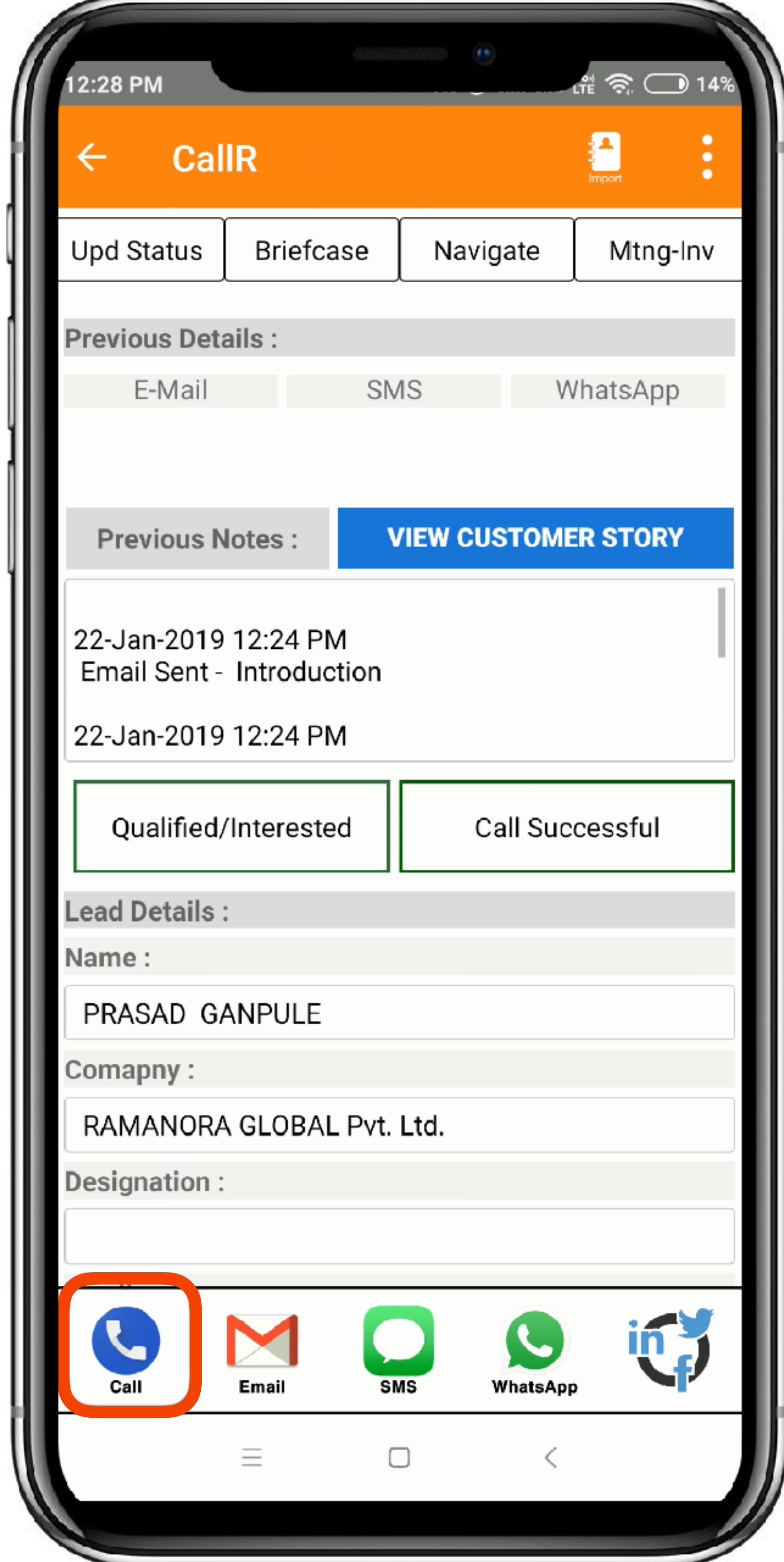


Step 13

Once the List is loaded, you shall see the recently added lead on the top.

The leads are added in the exact order they are collected/synced.

Click on the **Name of the Lead**, to access Lead Information

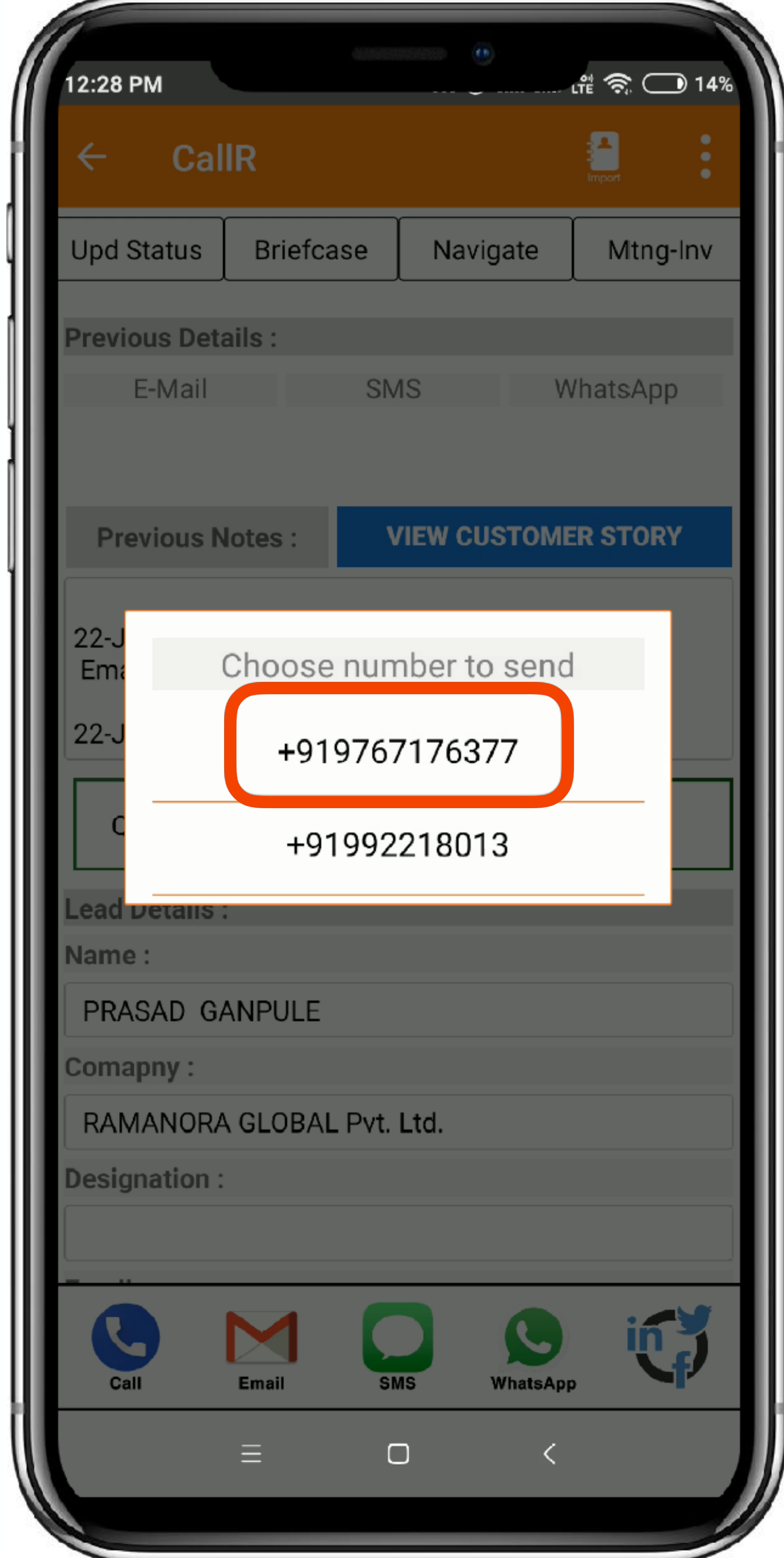


Step 14

This is the Details page of the Captured lead, you can view all the information of the Lead here, including the form details that were filled.

To begin FollowUp, first we will Call the Lead/Prospect

Click on the **Call** icon to choose numbers to call and call from the app.



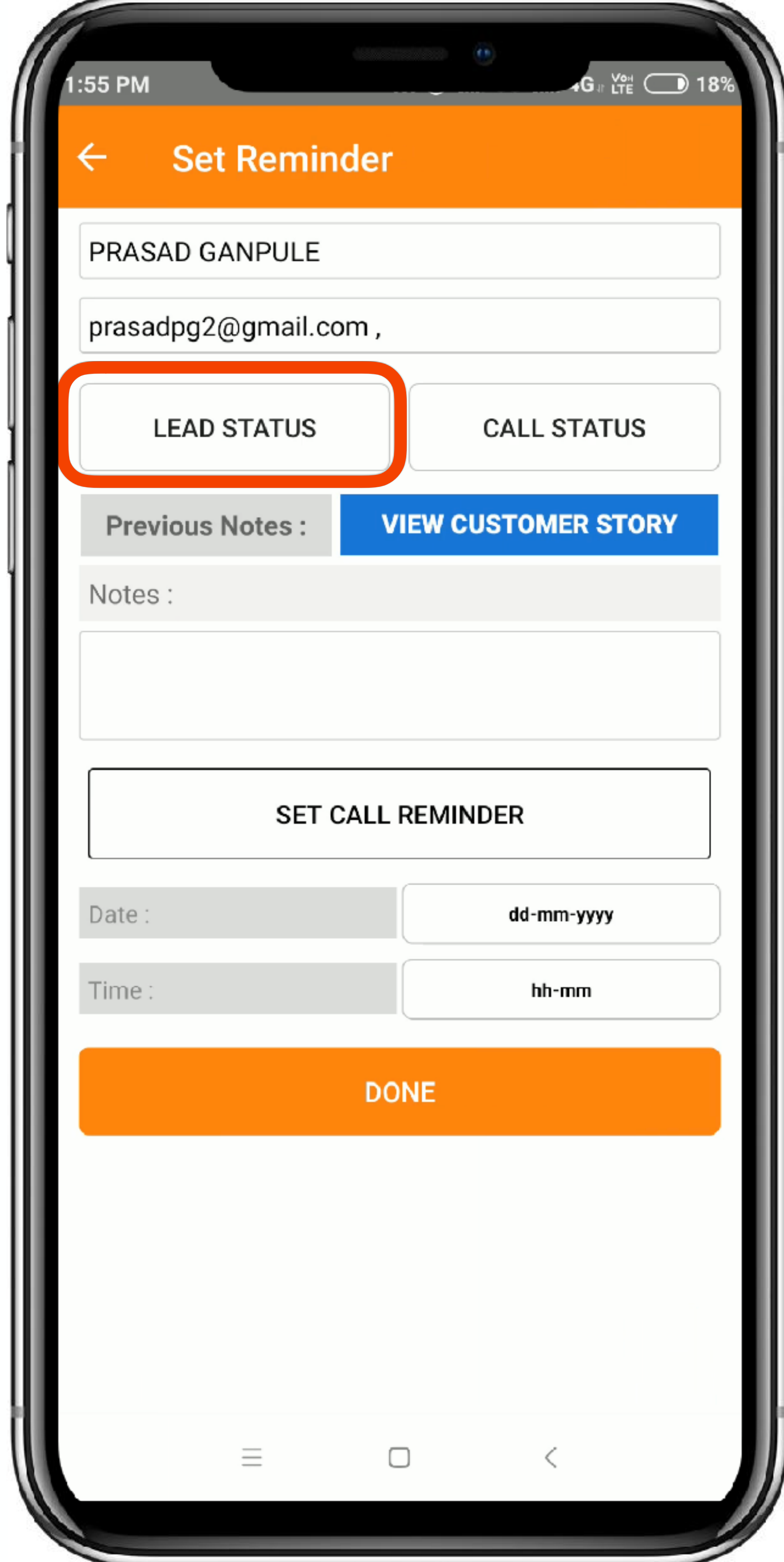
Step 15

Choose the Number you want to place a **Call** on



Step 16

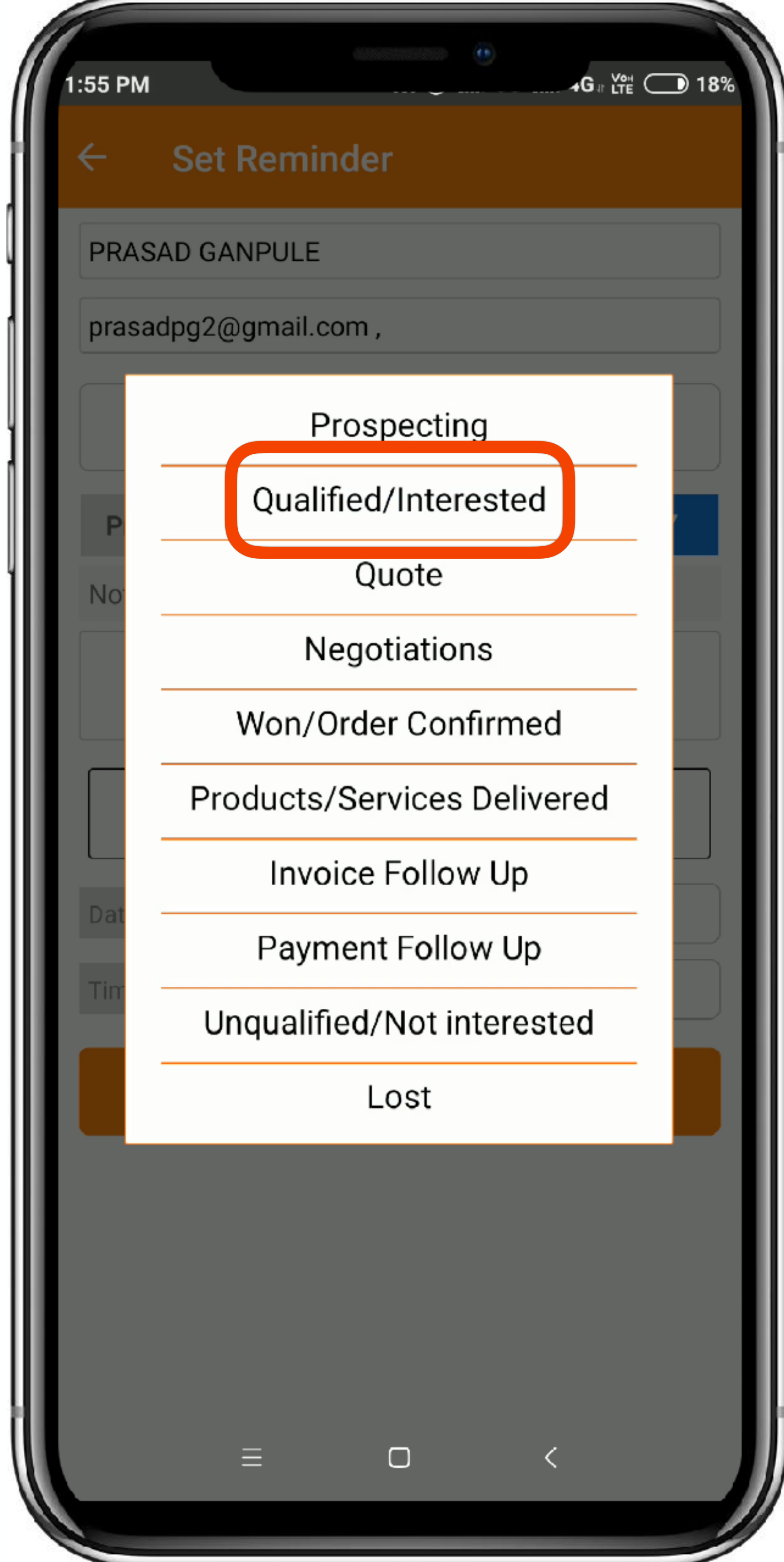
Your respective devices will place a call, they may also ask to choose a sim card to call in case of multi sim mobile phones.



Step 17

Once the Call is complete, an auto update screen will open in the CallR App where you can update the Lead Status, Call Status, Notes, Call back reminders, etc.

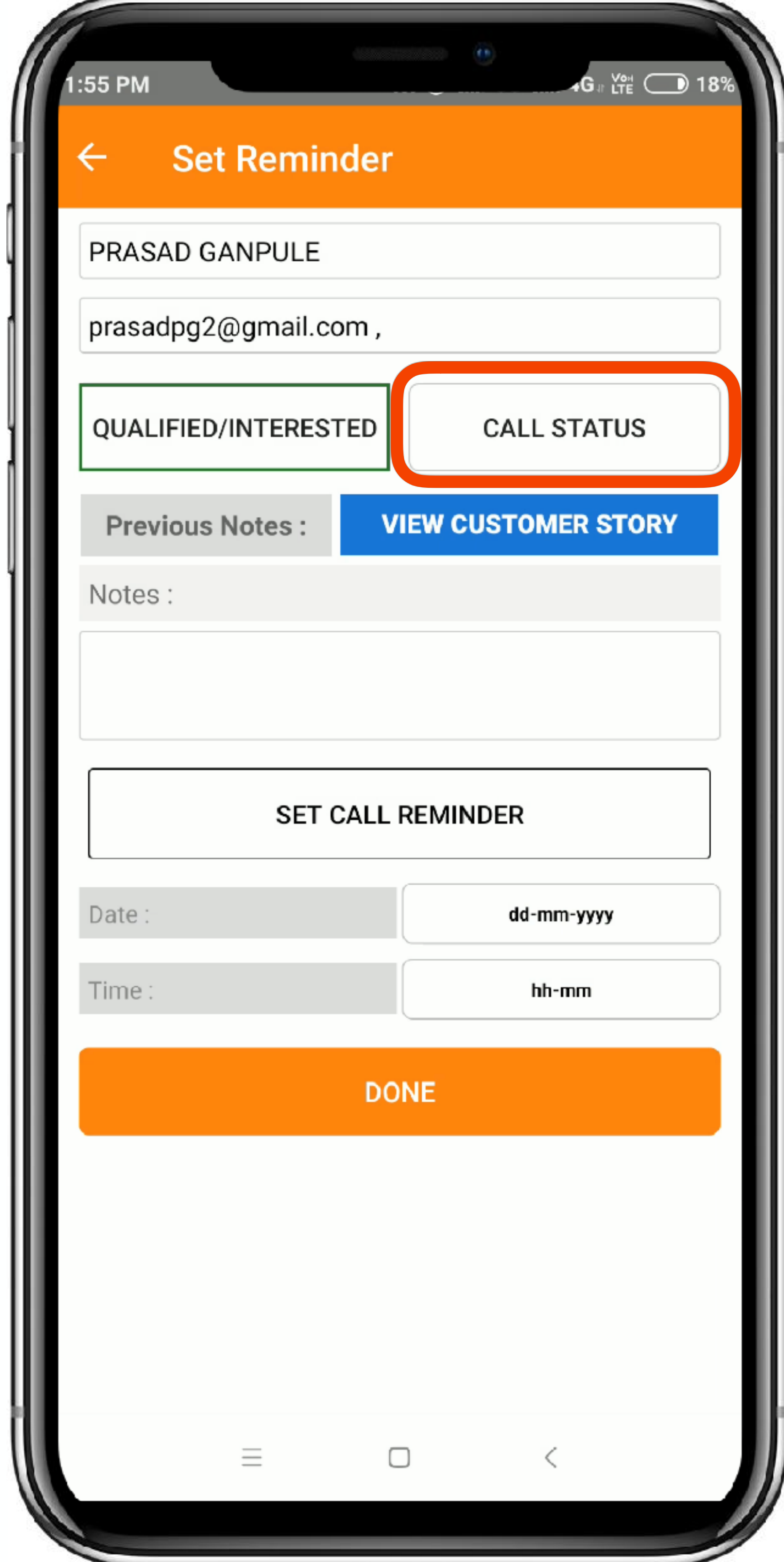
Now you can click on **Lead Status** icon to update the Lead Status



Step 18

There are different Lead Statuses that we have offered for you to update, You can choose any option depending upon your understanding about the Lead.

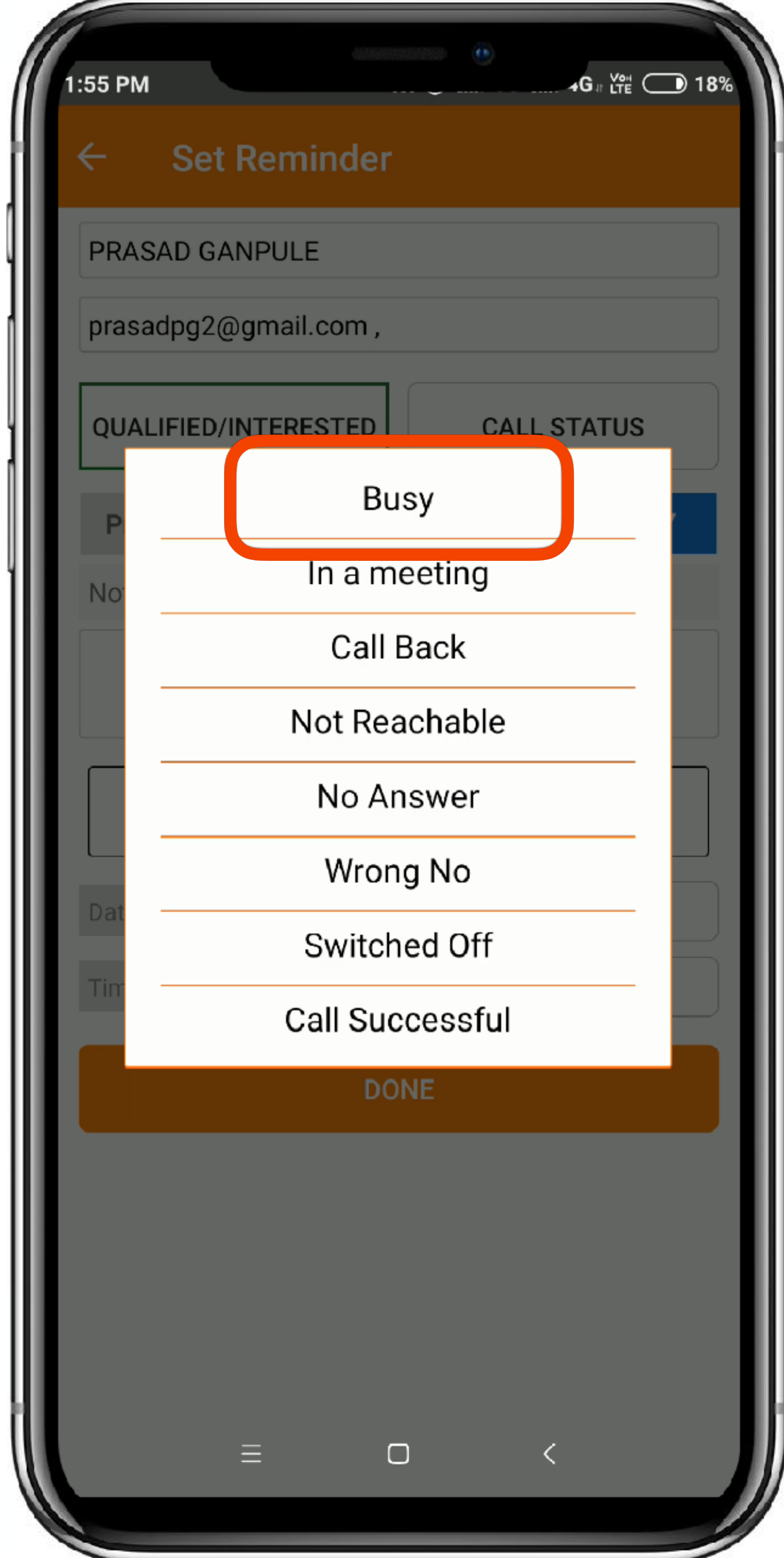
For the Demo you can click on **‘Qualified/Interested’**



Step 19

You can also update the Call Status, considering leads being busy, out of reach, in meetings.

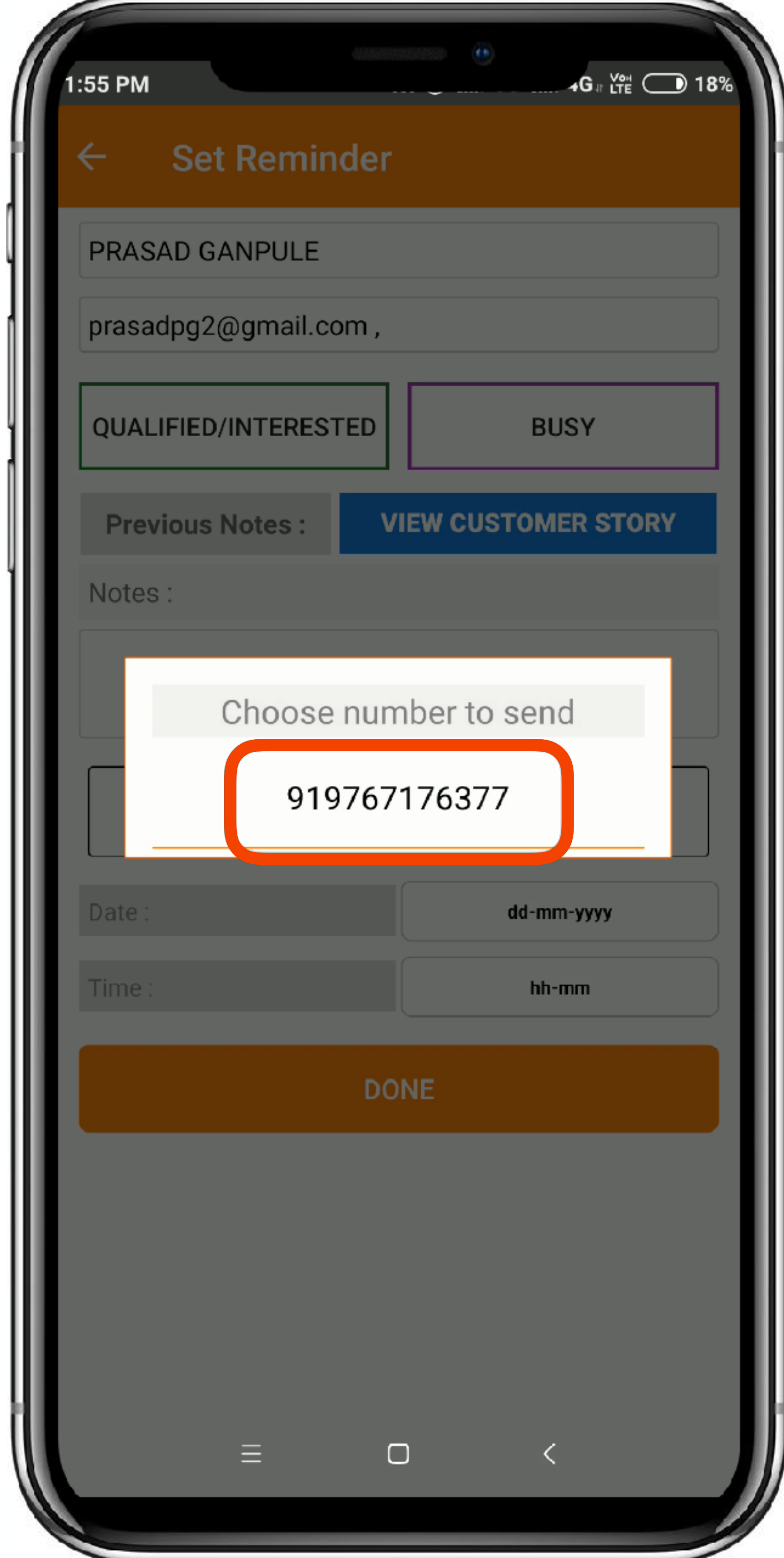
Click on '**Call Status**' to open options to choose.



Step 20

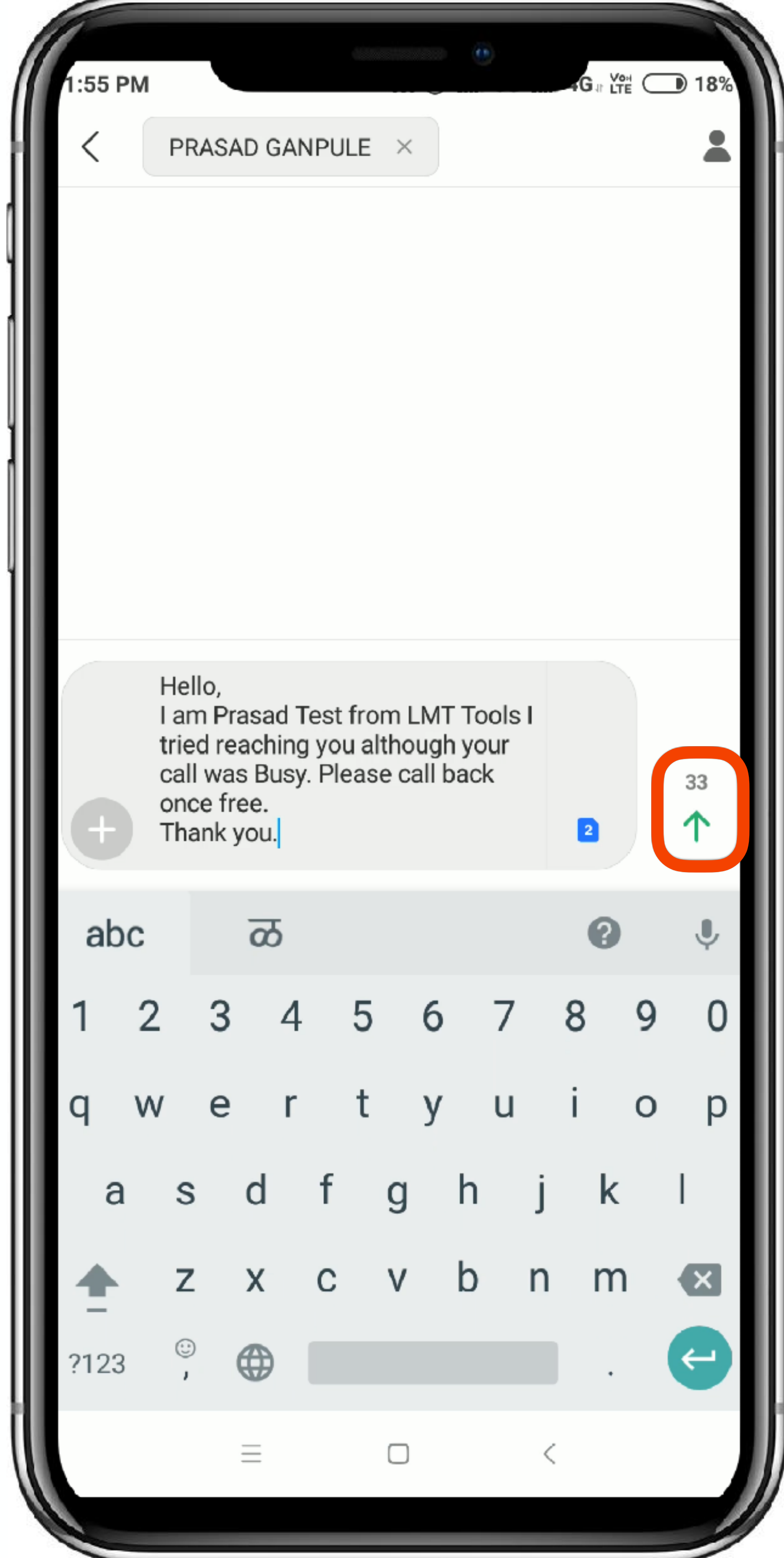
Now you can choose the status of the Call.

For the purpose of demo, you can choose '**Busy**' as there is a specific automation which helps in having a quick communication with the lead in case of unanswered calls.



Step 21

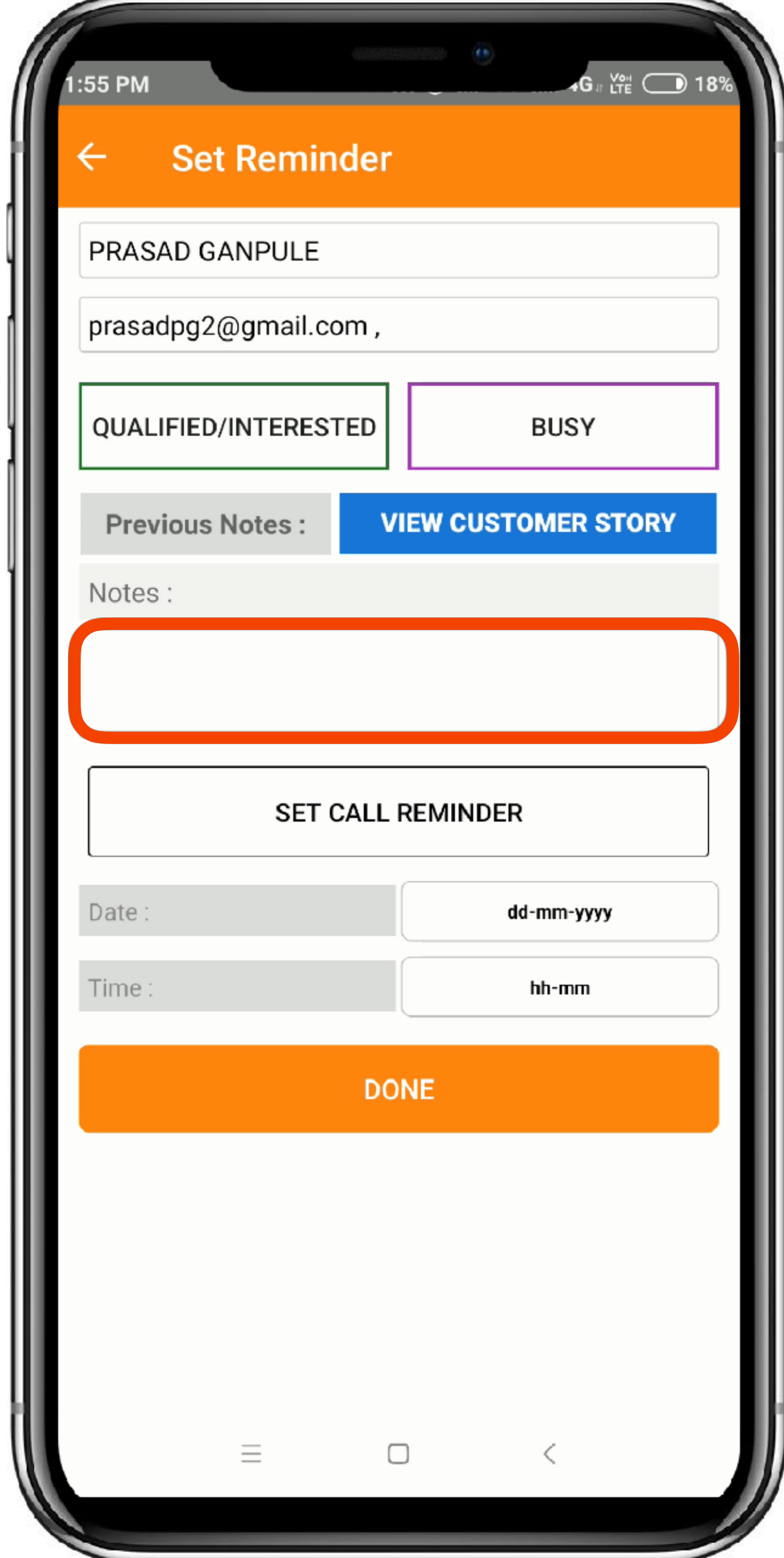
Once you choose Busy, choose the number on which you had placed a call on.



Step 22

you can see, an automated SMS is generated in the sms section of the number you had selected, the messages are designed in a way to help you connect and inform the lead in just 1 click about your call.

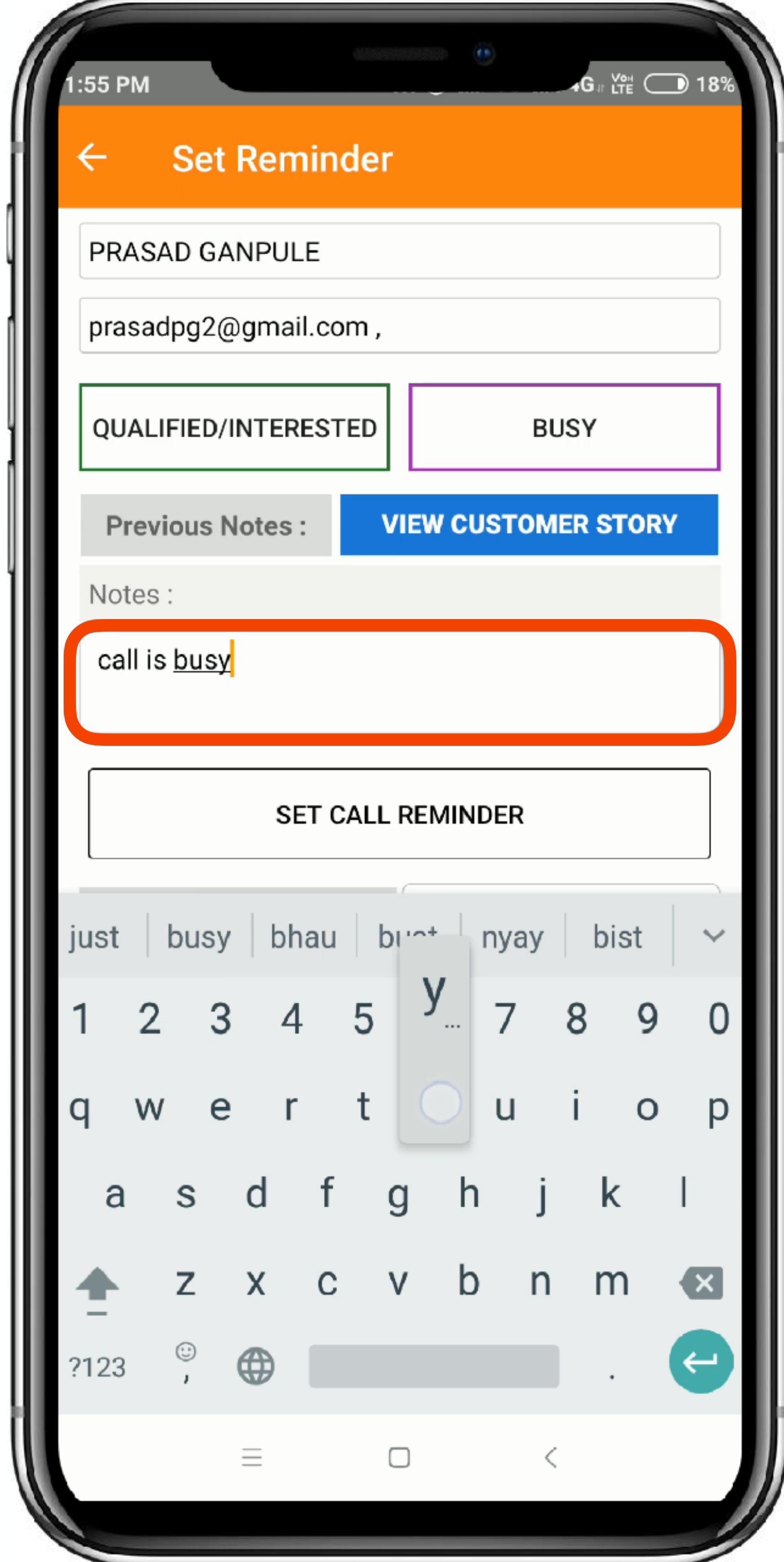
Click on '**Send**' to send message to the Lead to call back.



Step 23

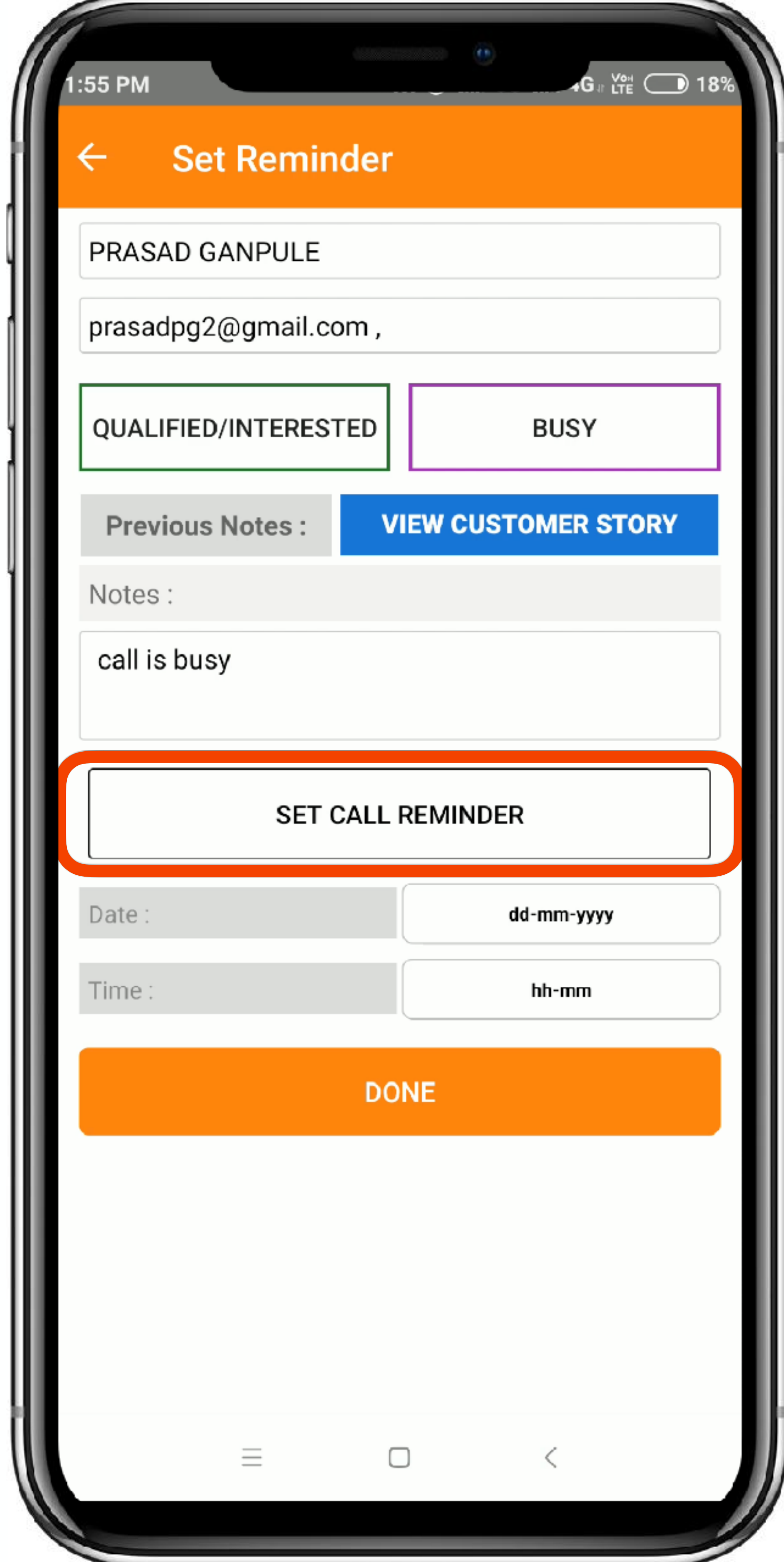
Now you can also update the Notes section, to keep a track of the discussion you had with the customer, so that next time you connect, you know the previous discussion at your finger tips.

Click in the '**Notes**' Section to call the keyboard.



Step 24

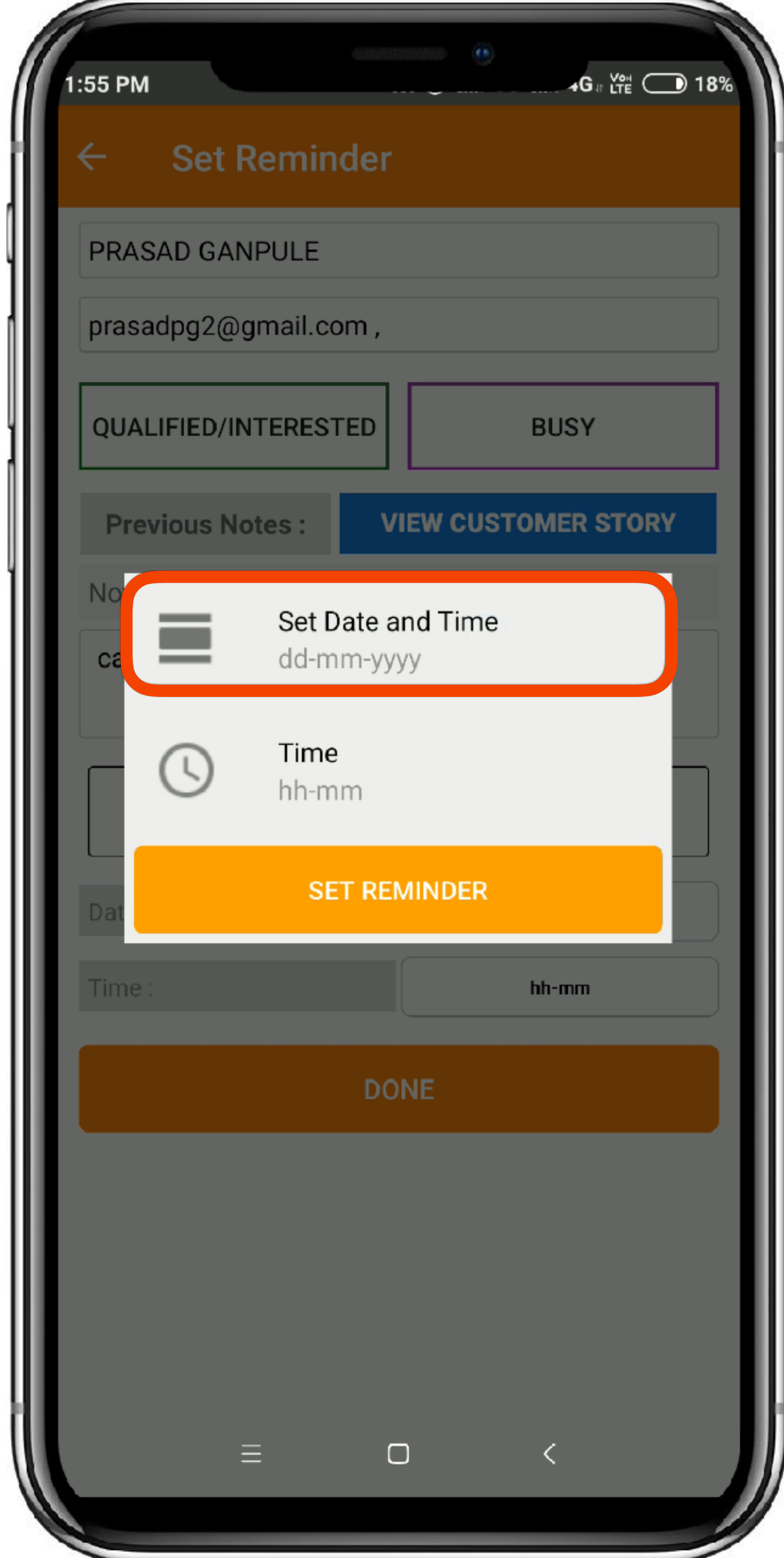
With the notes related keyboard, you can write the **call notes.**



Step 25

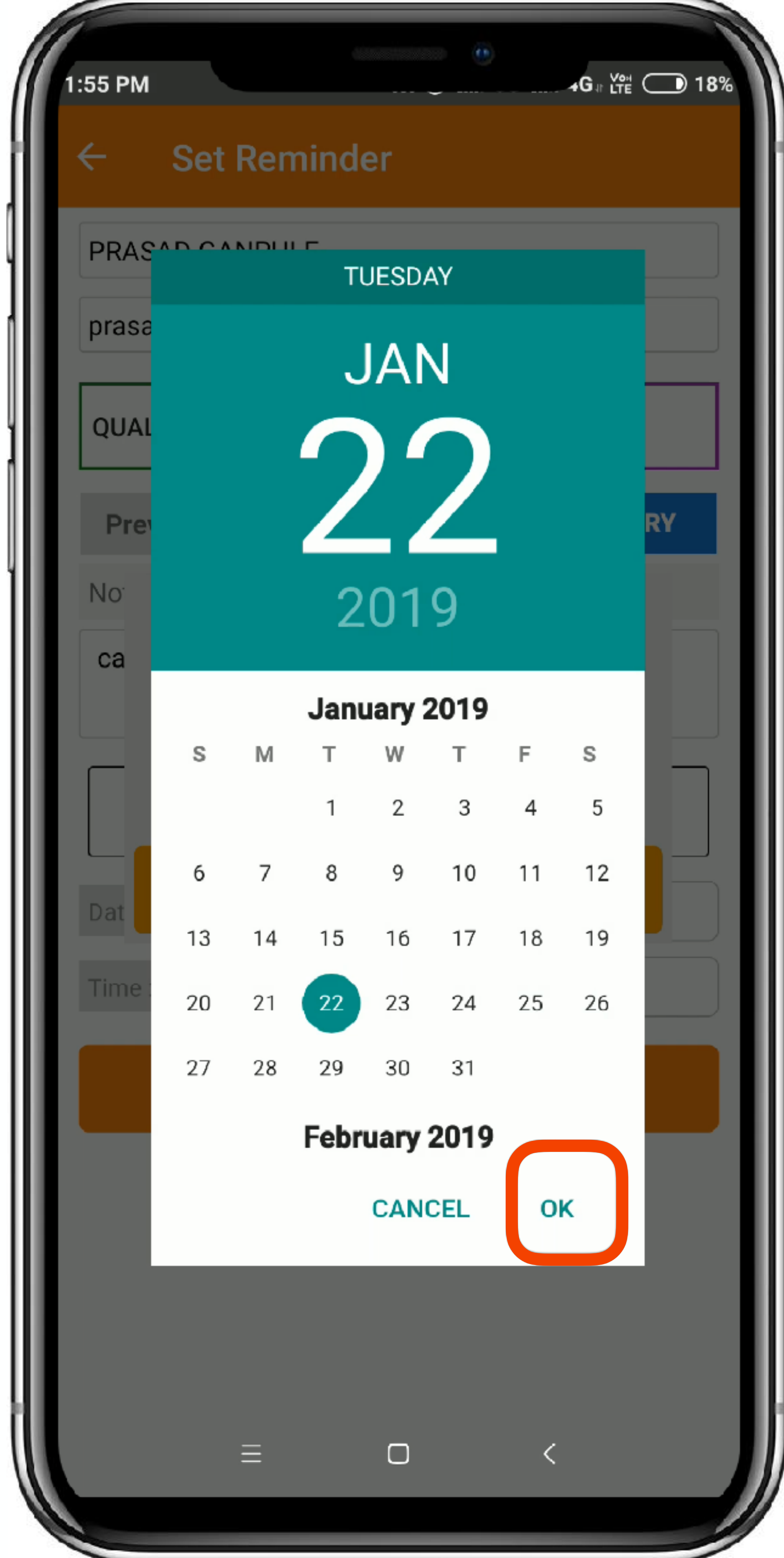
You can now Set a Call Reminder depending on either the guidance of the lead or on the basis of your thoughts to call back for next FollowUp

Click on '**Set Call Reminder**' to open the Calendar and time selection menu.



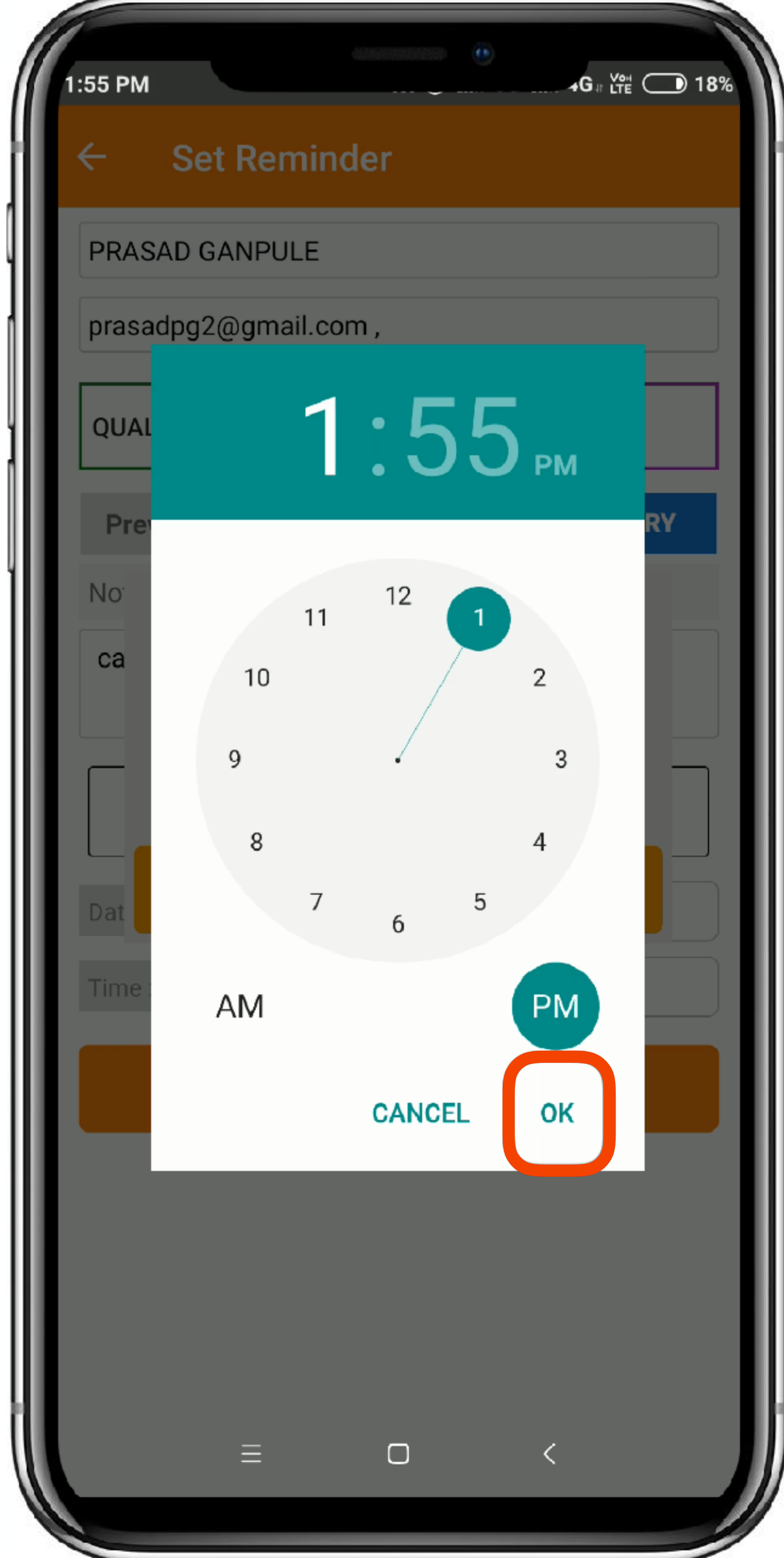
Step 26

Click on the **Date** selection menu to select date.



Step 27

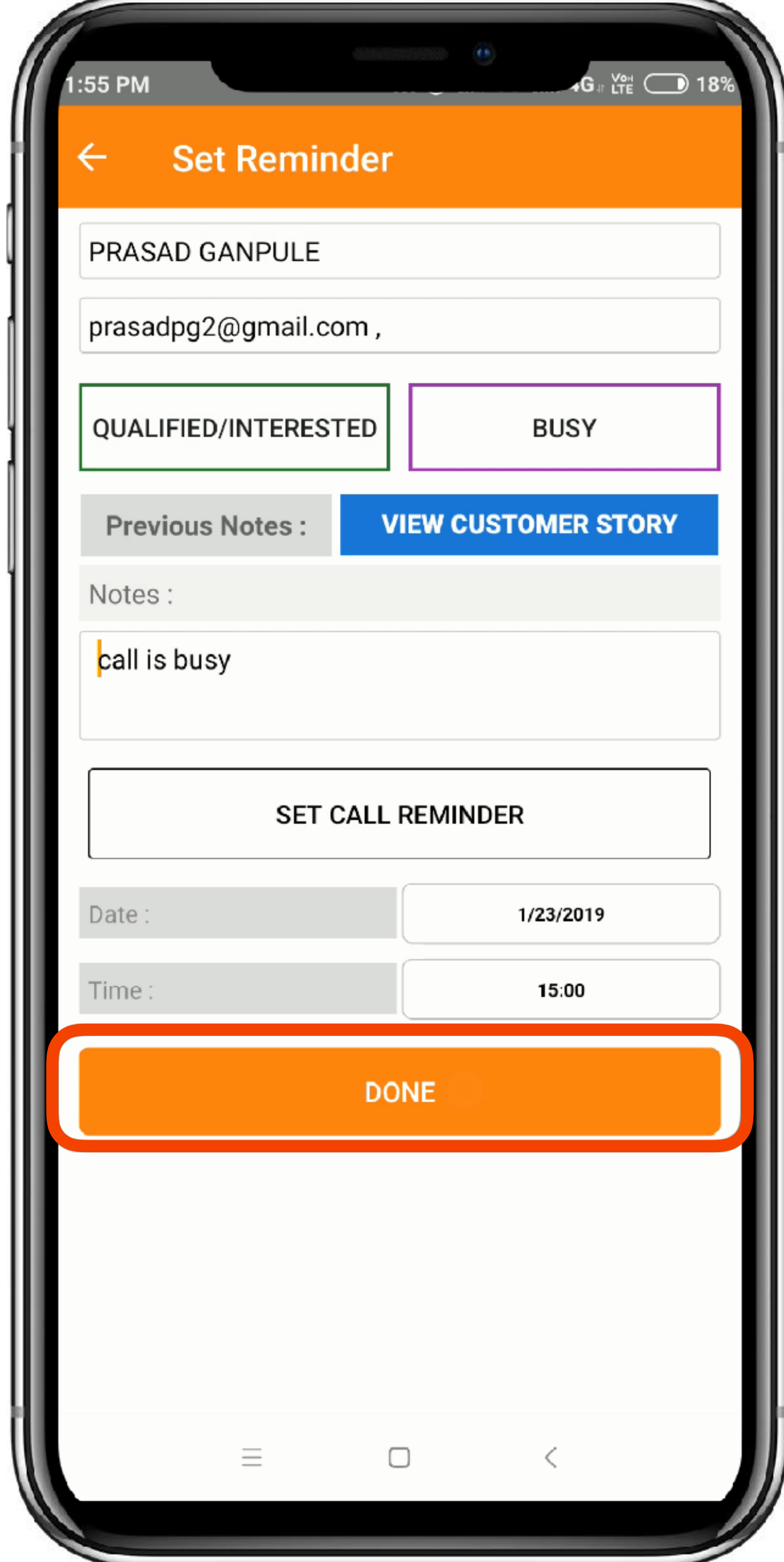
Once you have selected the date, click on '**Ok**' to confirm.



Step 28

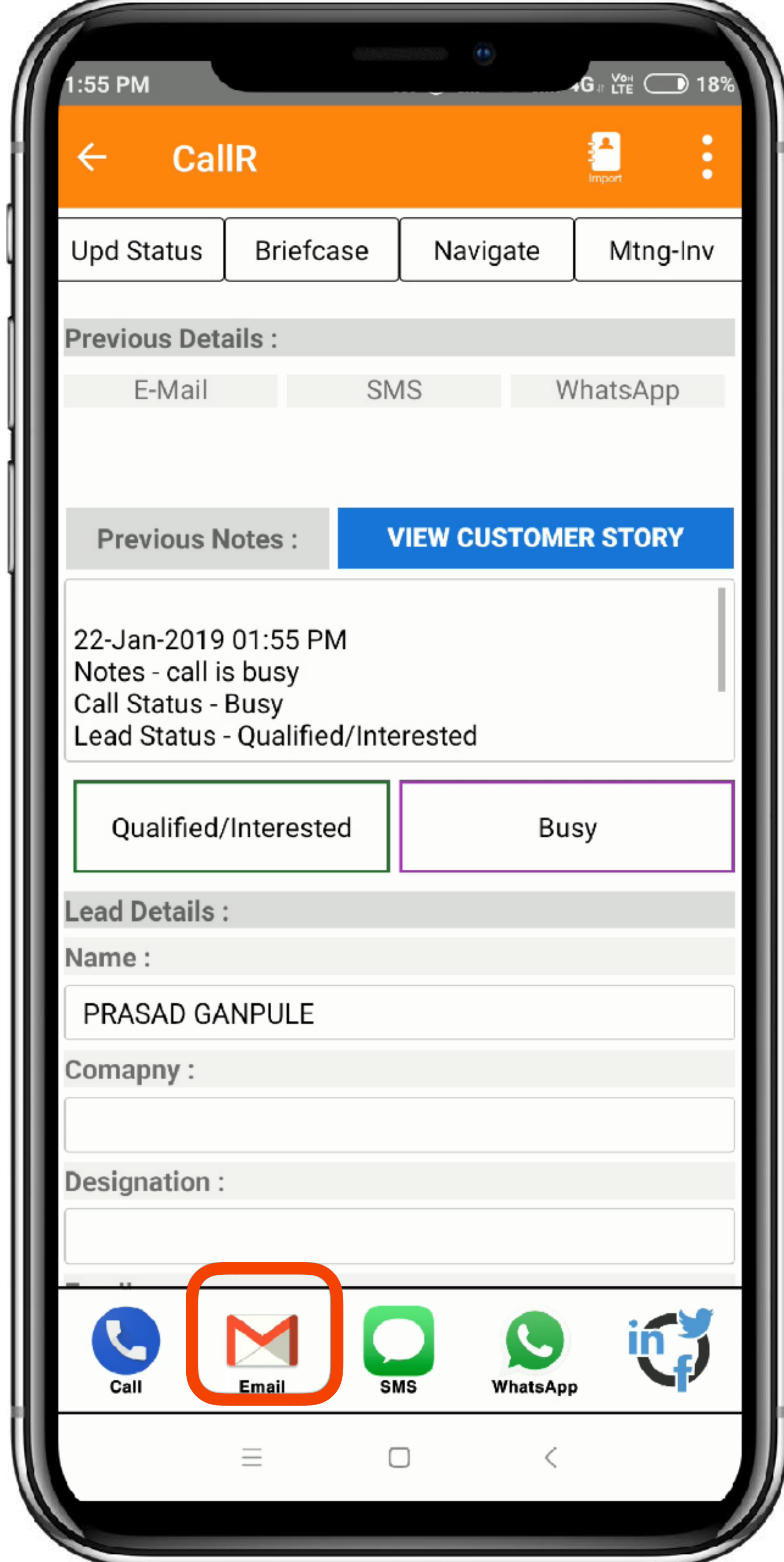
Now you can choose the desired time to set the Call Reminder.

Once done, click on '**Ok**' to confirm the time of the reminder.



Step 29

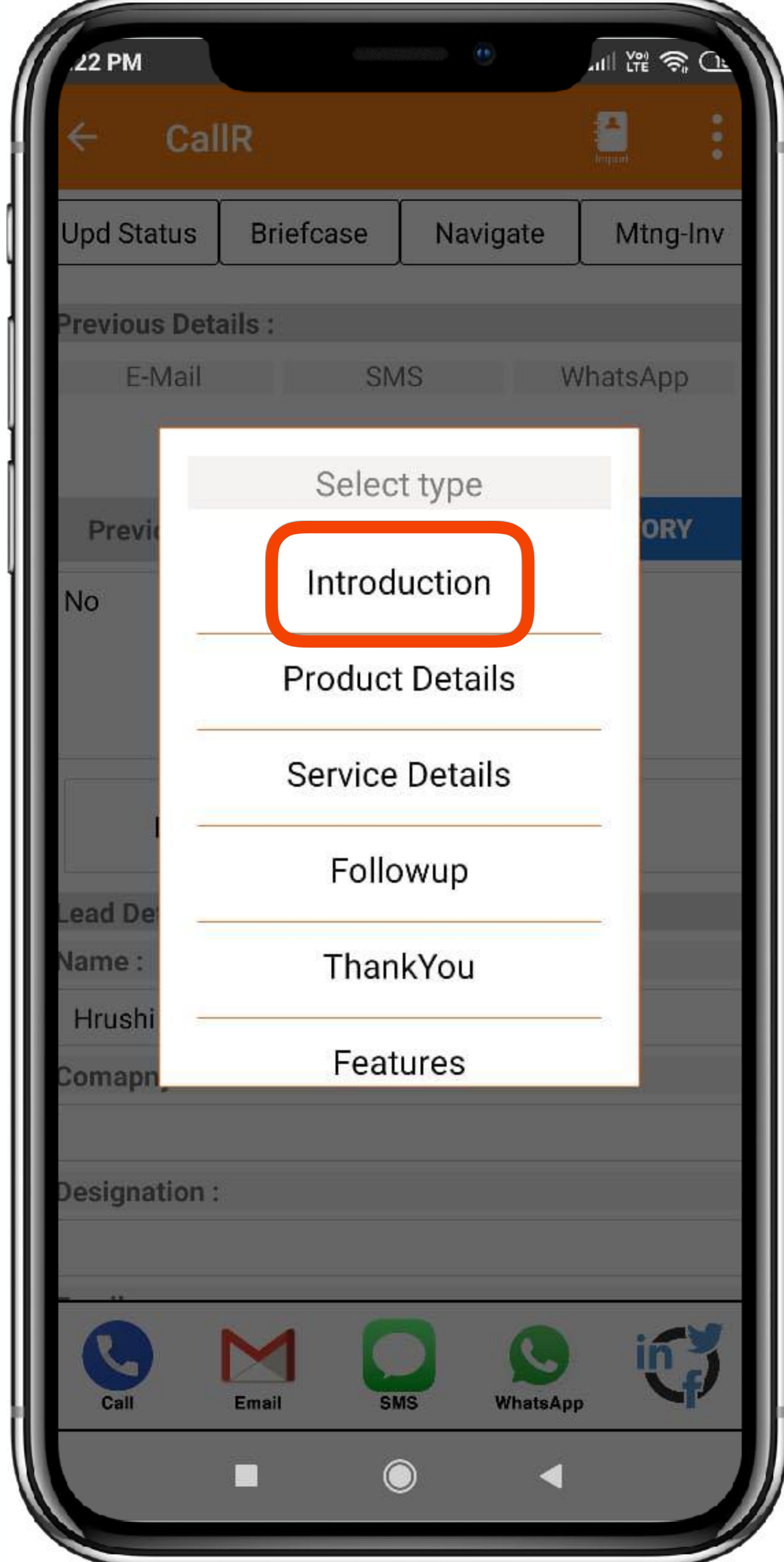
Once you have completed the update section for the call that took place or the meeting that happened, you can click on '**Done**' to store your inputs.



Step 30

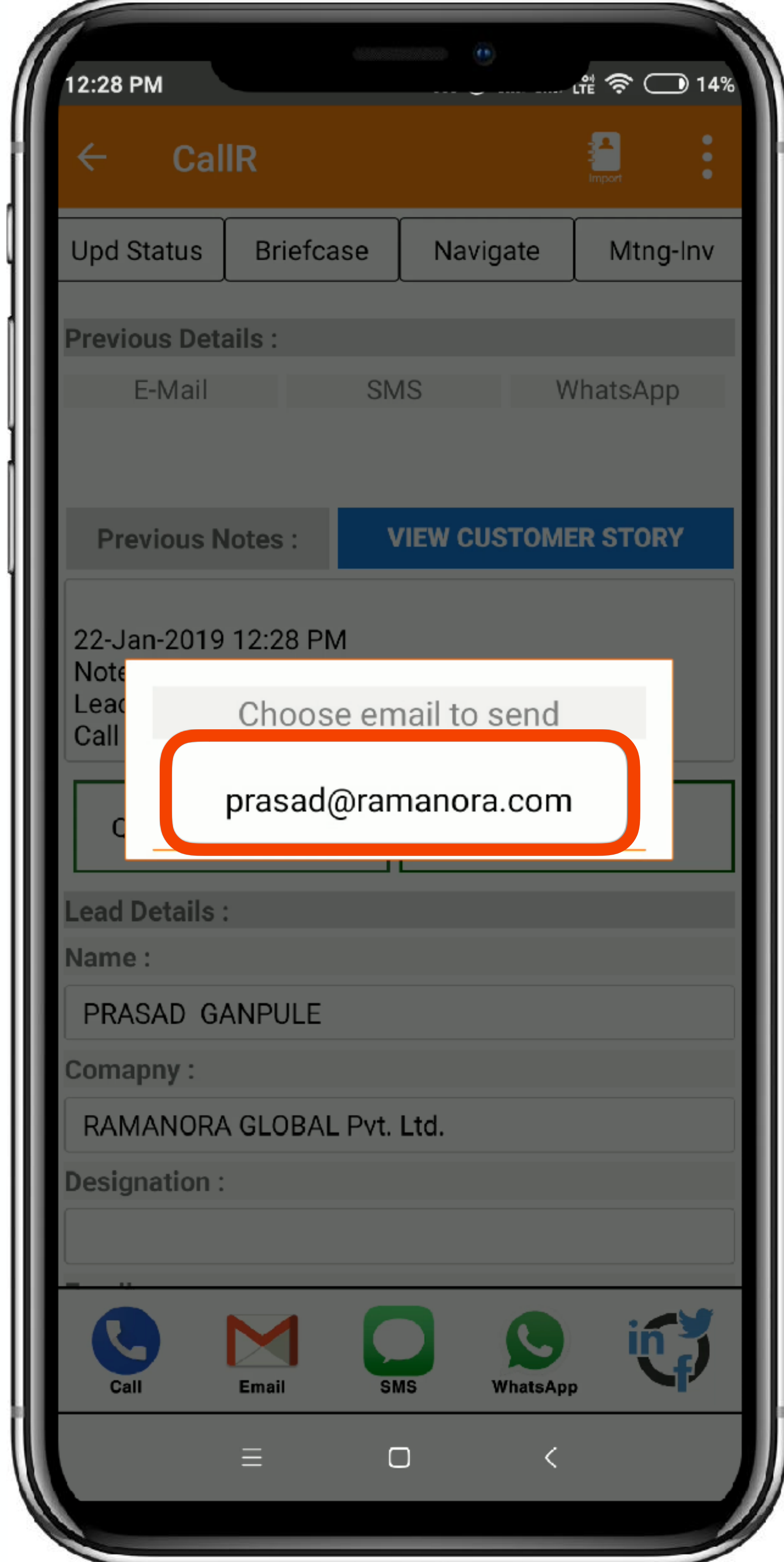
Now lets Connect with the Lead/Prospect by sending him an email related to his requests.

Click on the '**eMail**' icon next to Call icon to open the template choosing section.



Step 31

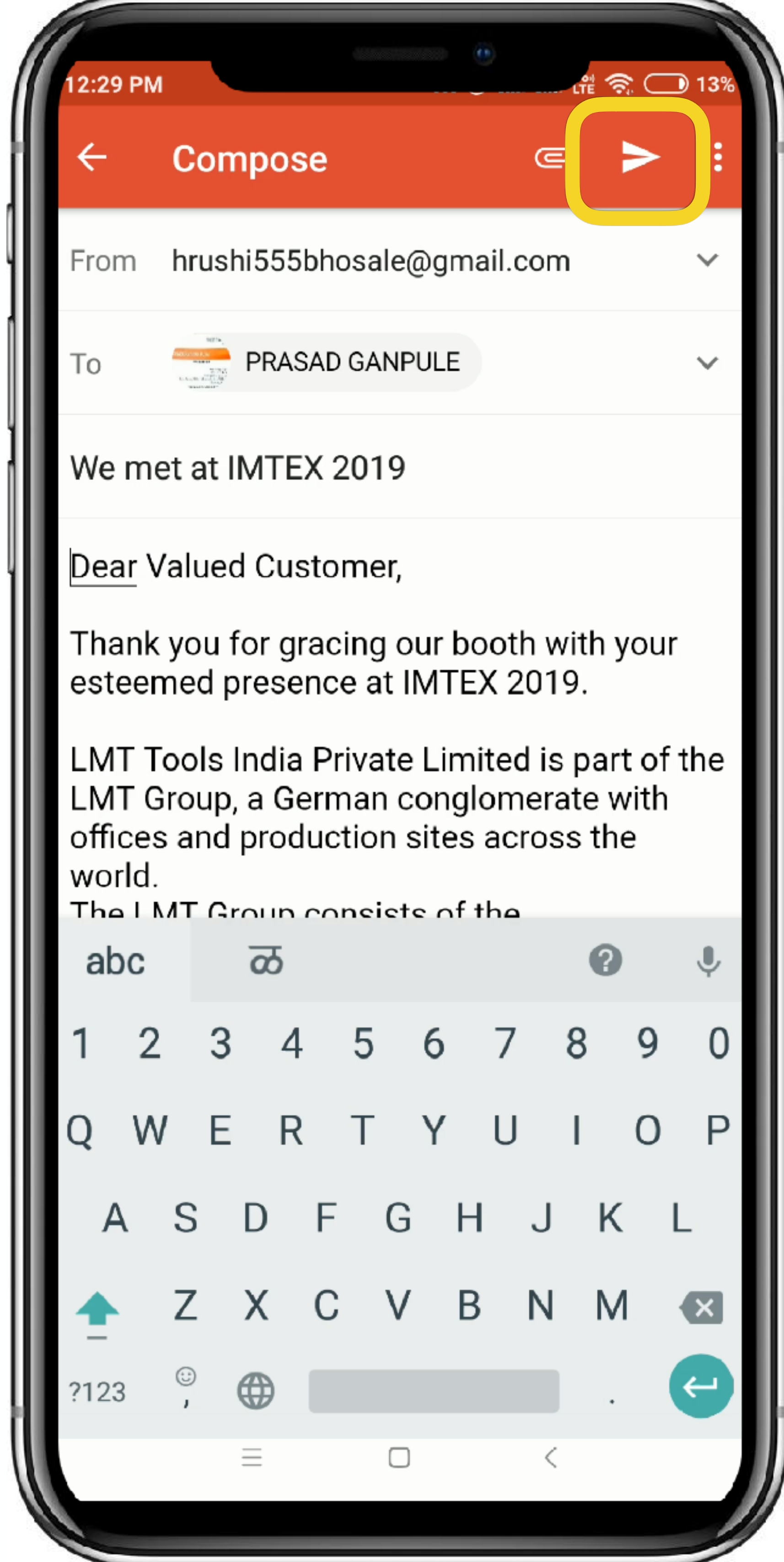
Now you can '**select**' the type of email you want to send to the customer. In the Demo version, you can see various templates to send.



Step 32

Once you choose the type, now choose the '**eMail ID**' to which you want to send the email.

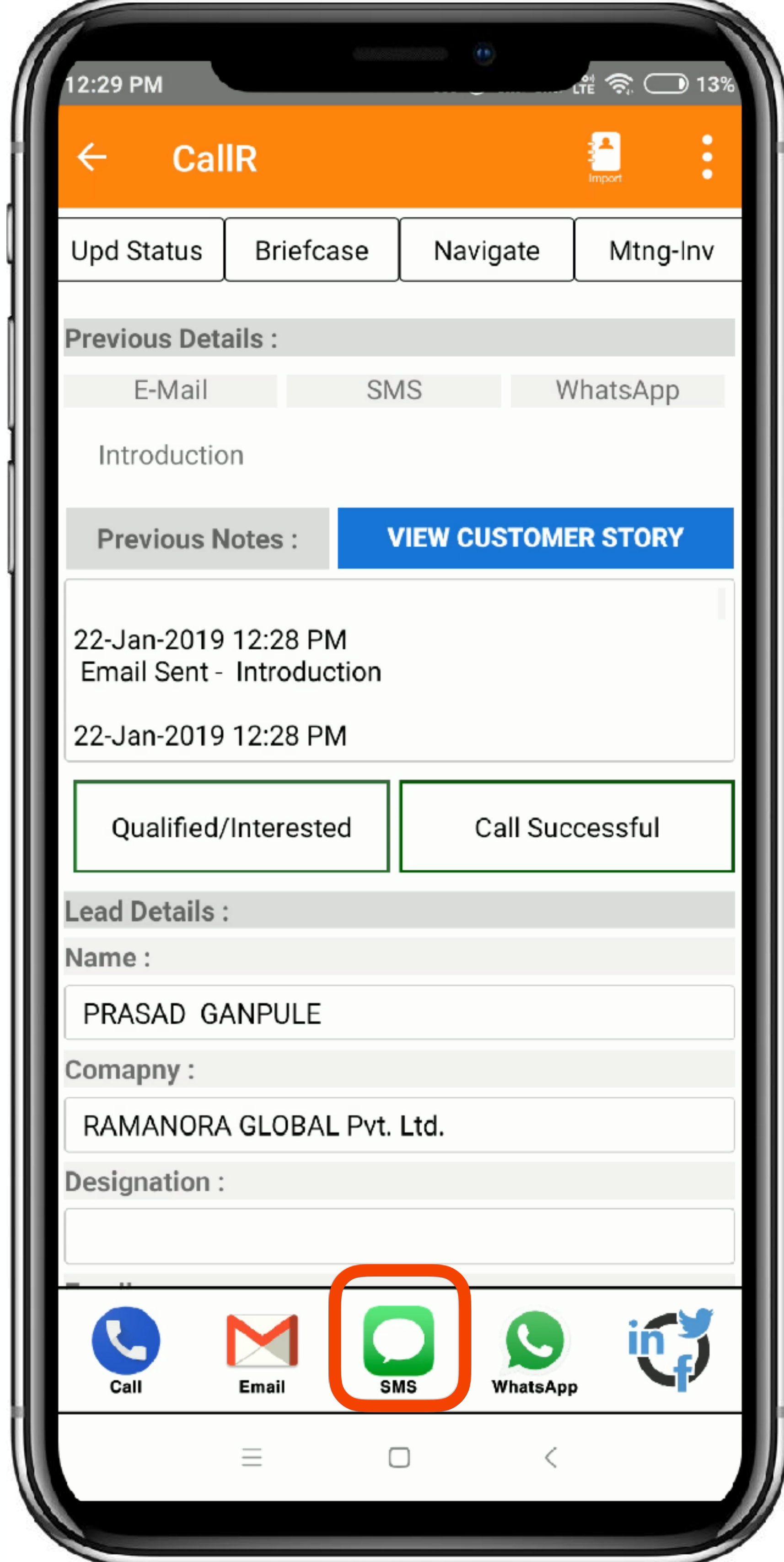
In few cases you may have email IDs more than one.



Step 33

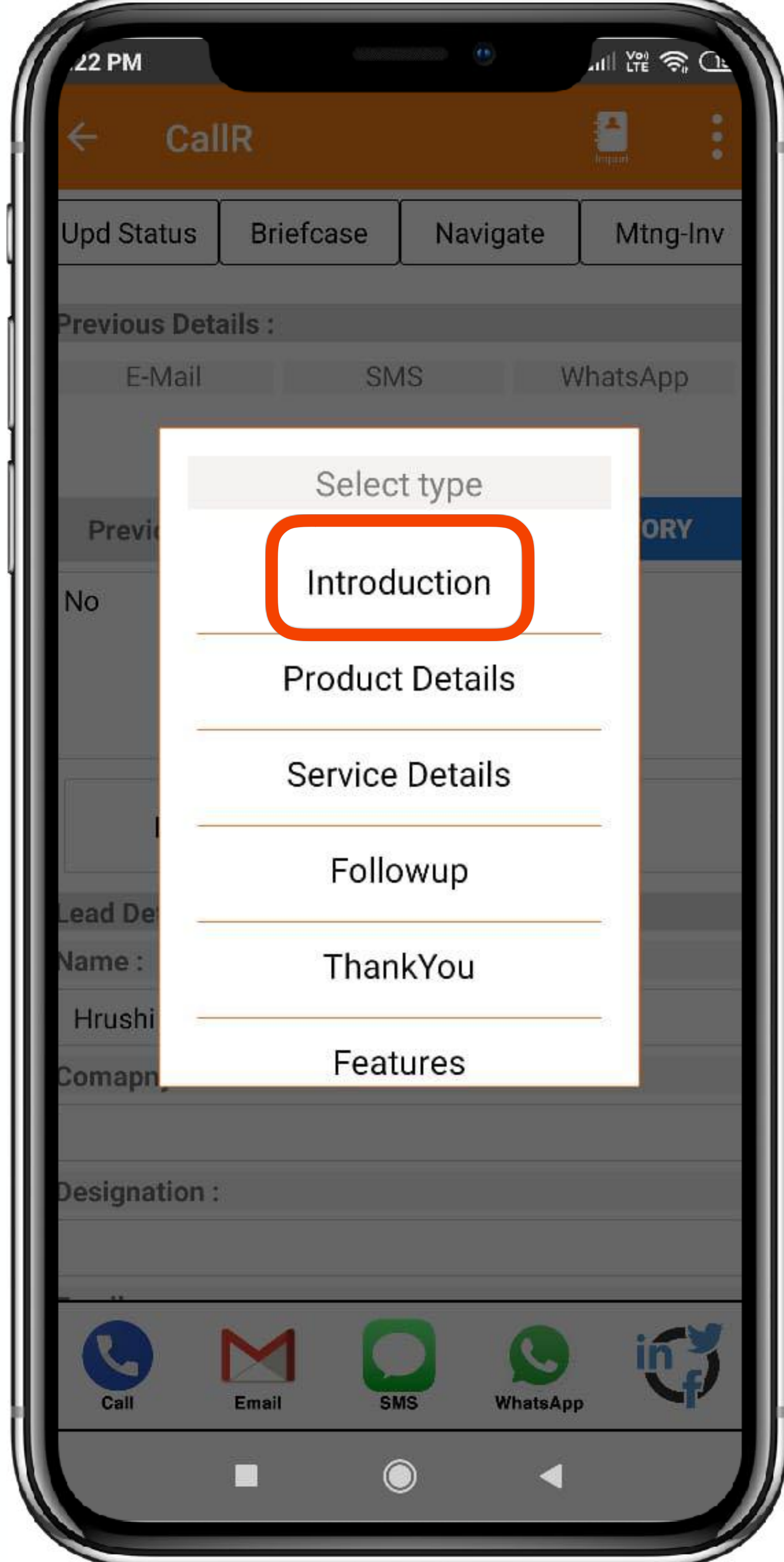
Now all the email, text will be updated in your choice of email client,

Once you confirm the text, you can simply click on **Send** to send the email to the Lead/Prospect.



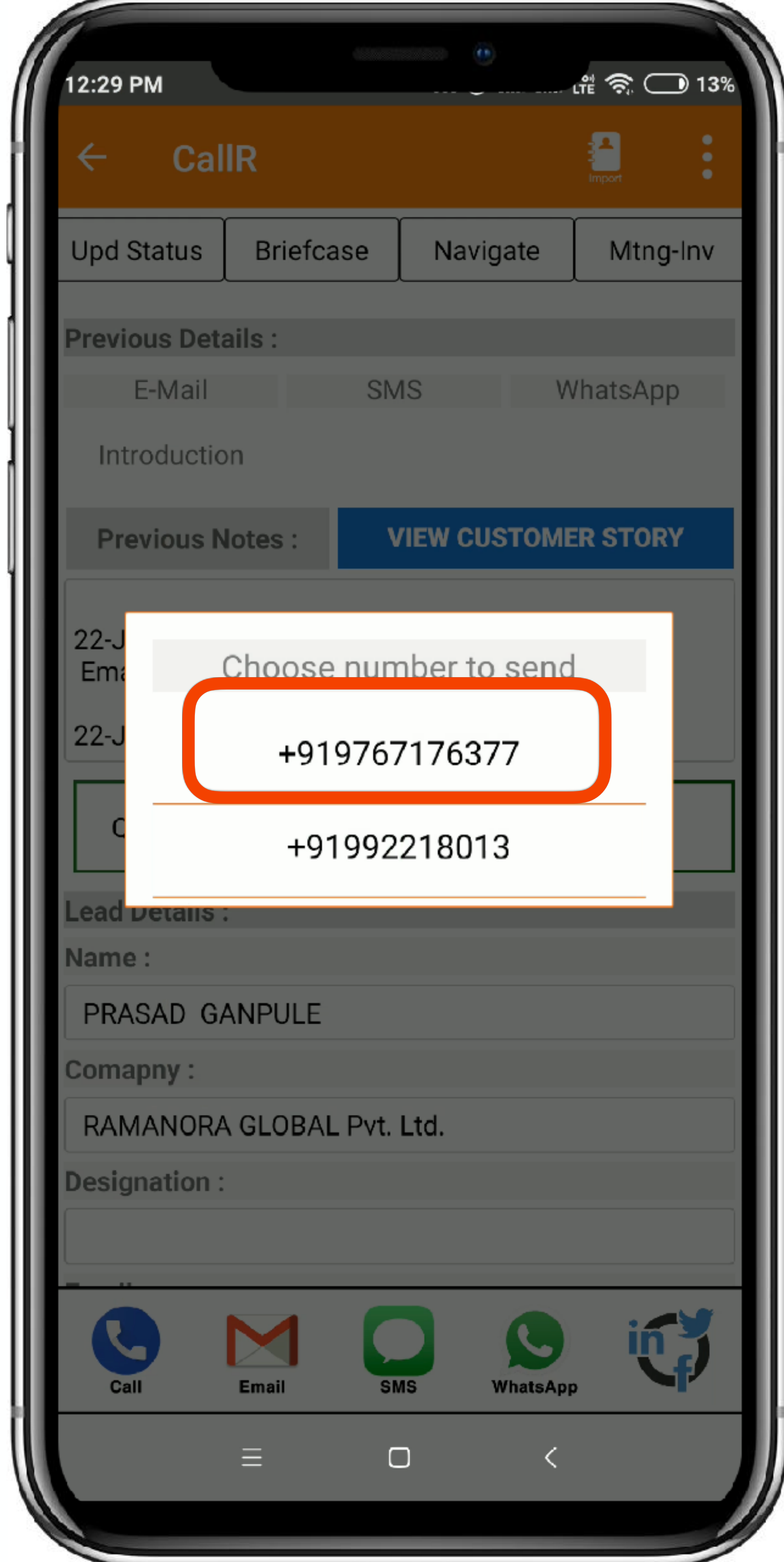
Step 34

Now let's connect with the Lead/Prospect using 'SMS'. To send SMS choose the **'SMS icon'** next to the email icon.



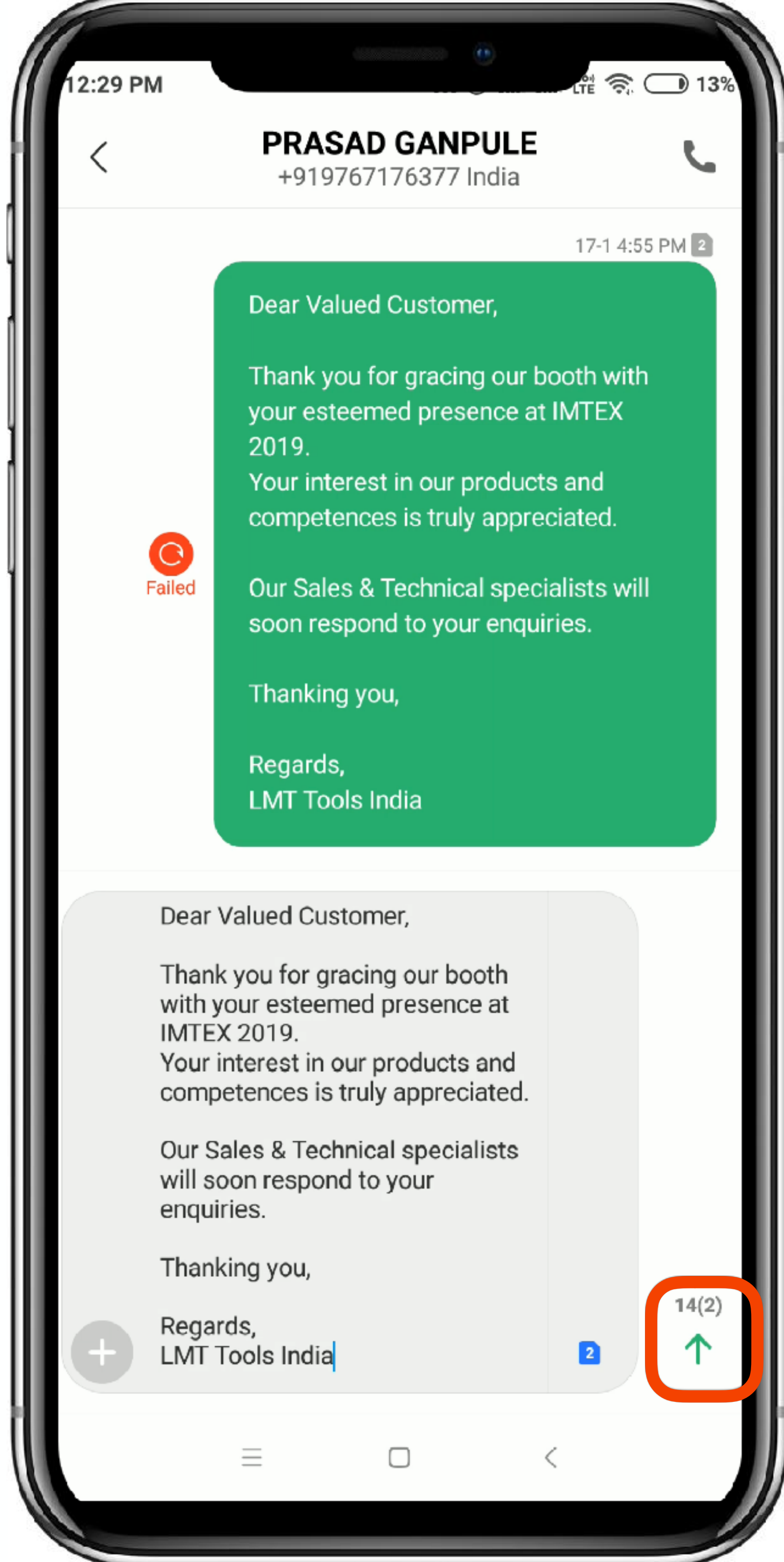
Step 35

You may now choose the type of '**SMS template**' to be sent to the Lead/Prospect.



Step 36

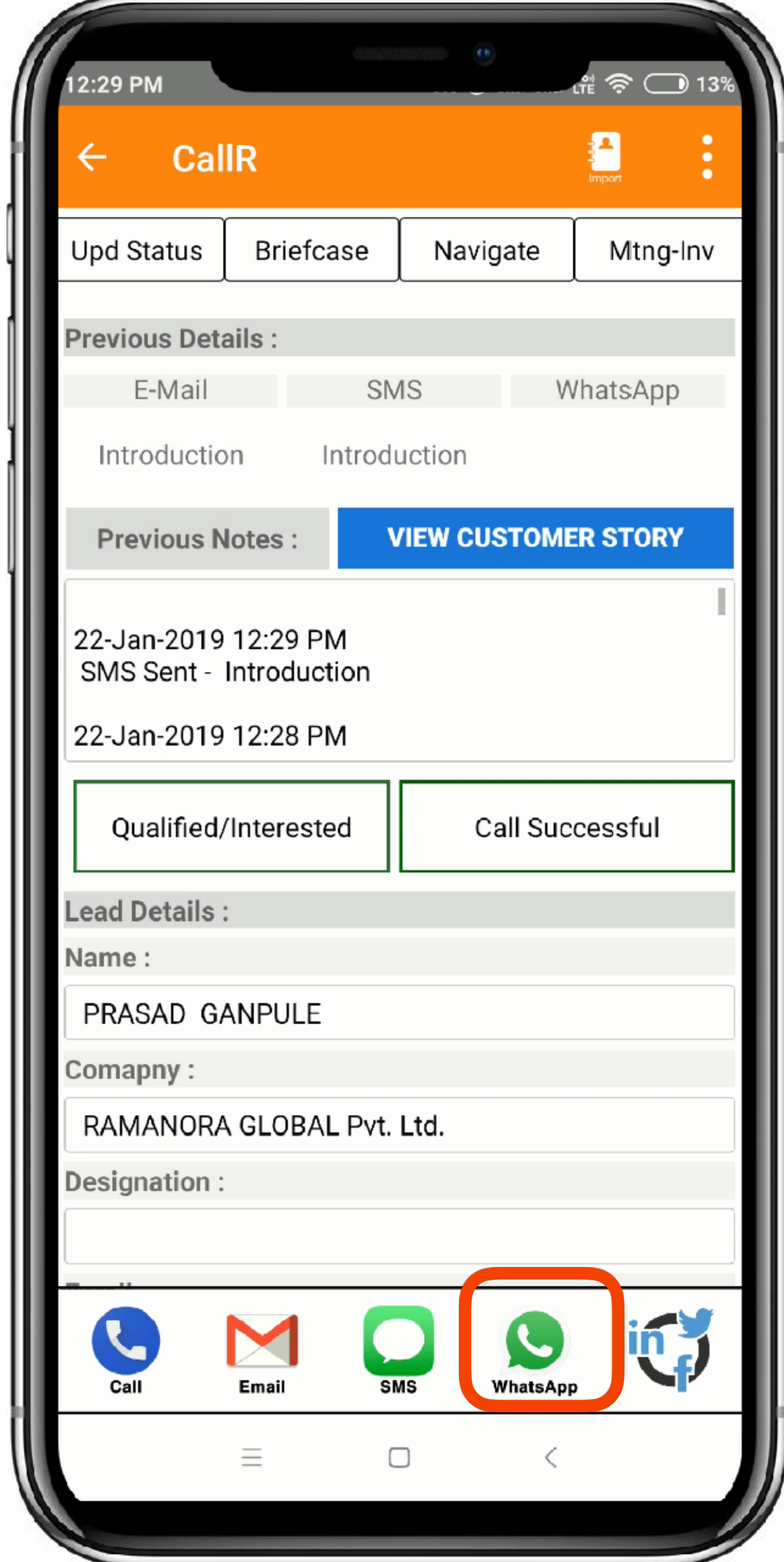
Now Choose the
'Number' to send the
SMS to.



Step 37

Now the app shall open the SMS app with all the template added into the SMS section for the number selected.

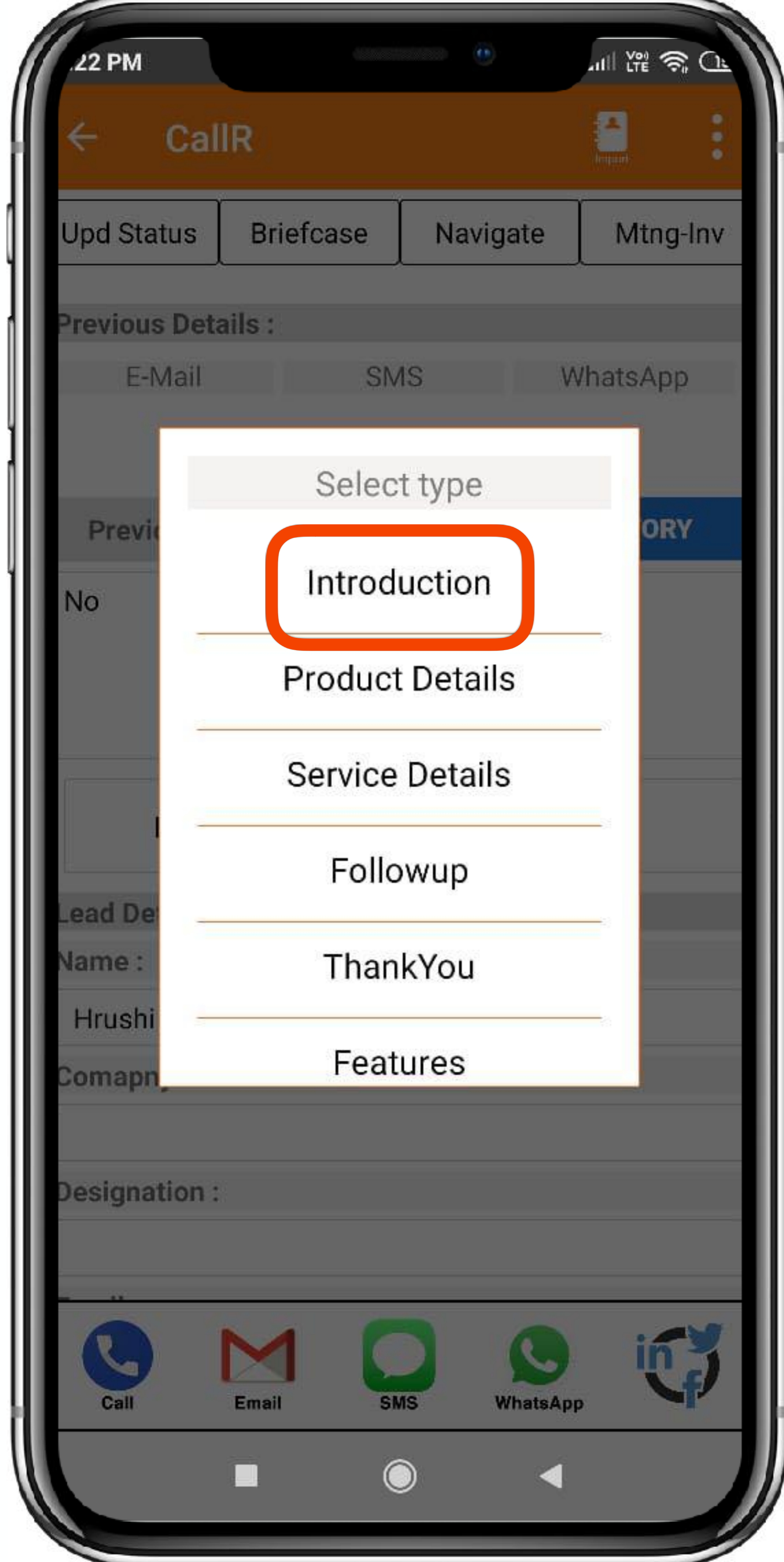
Once you confirm the content, click '**Send**' to send the SMS.



Step 38

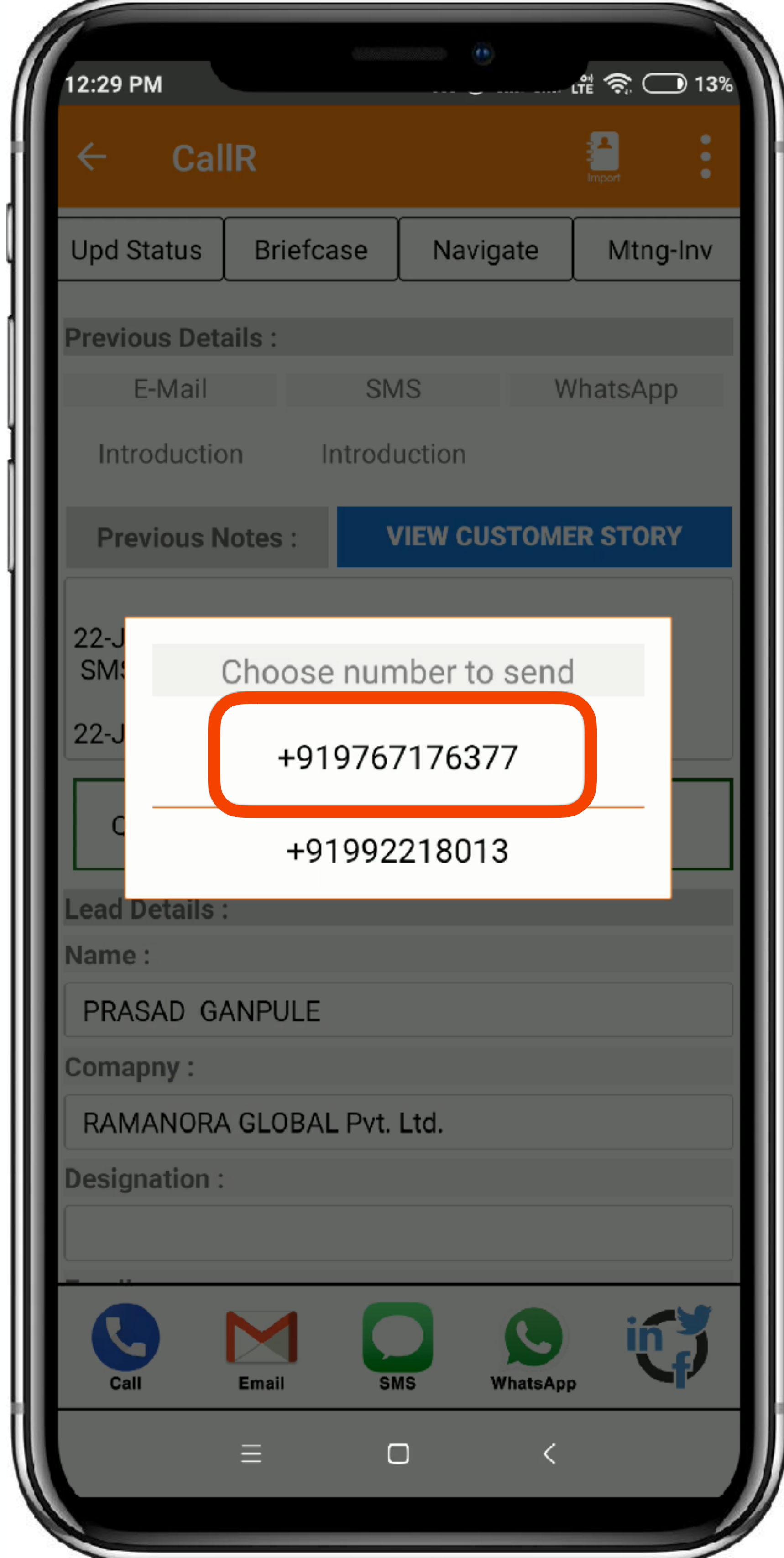
Now let's connect with the lead over WhatsApp.

To send WhatsApp click on the '**WhatsApp icon**' next to the SMS icon.



Step 39

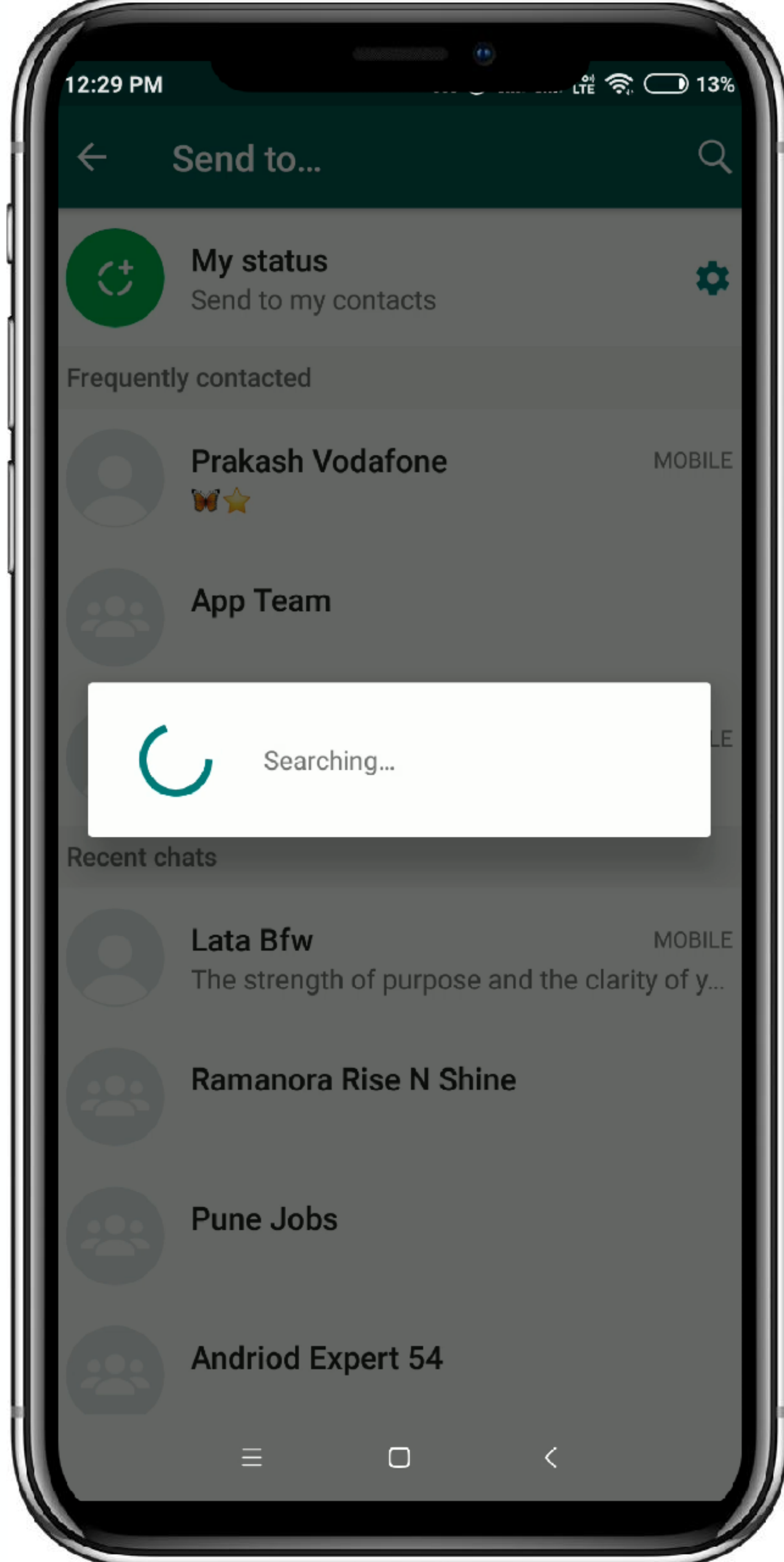
Now choose the type of **‘WhatsApp Template’** you want to send to the Lead/Prospect.



Step 40

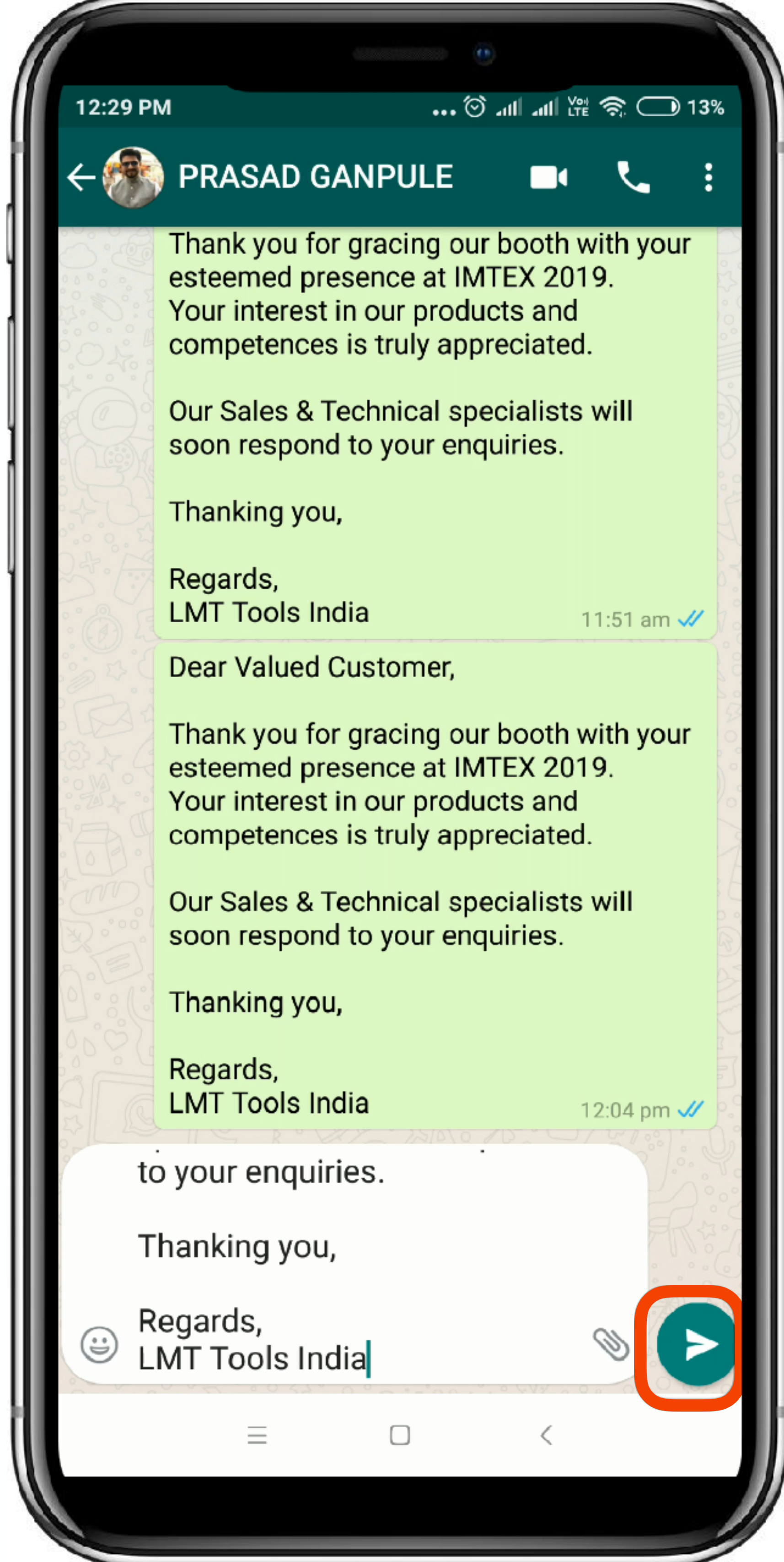
‘Choose the number’ to which you want to send the WhatsApp message to.

In the LeadCon app, you don't need to save the contacts to the send a WhatsApp message, although the number to which you are sending the message should be registered on WhatsApp to receive a message.



Step 41

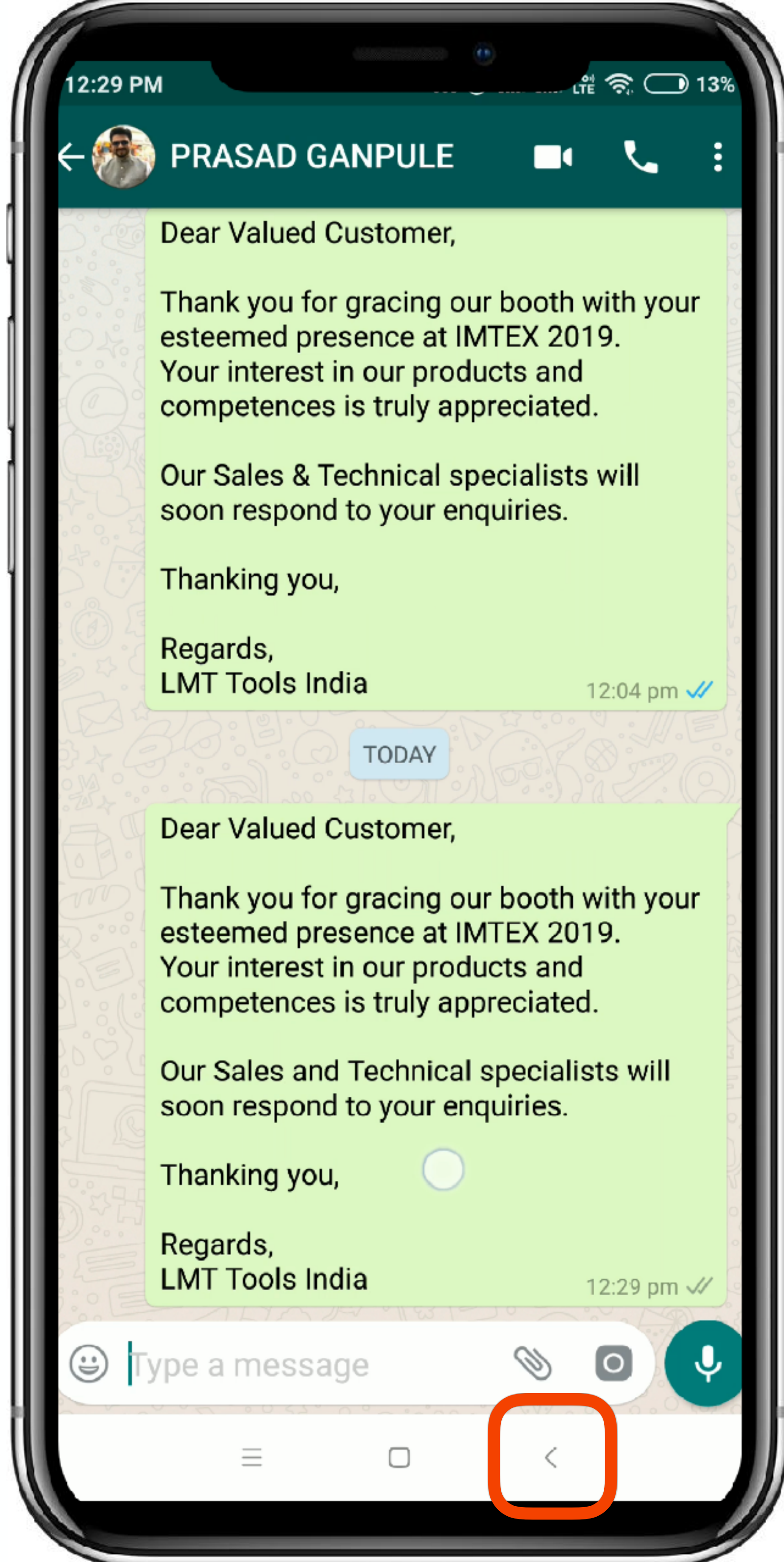
Once on the WhatsApp, it will search the number that was selected. In case the network is down/the number cannot be found, WhatsApp will give an error saying, 'This number is not on WhatsApp'



Step 42

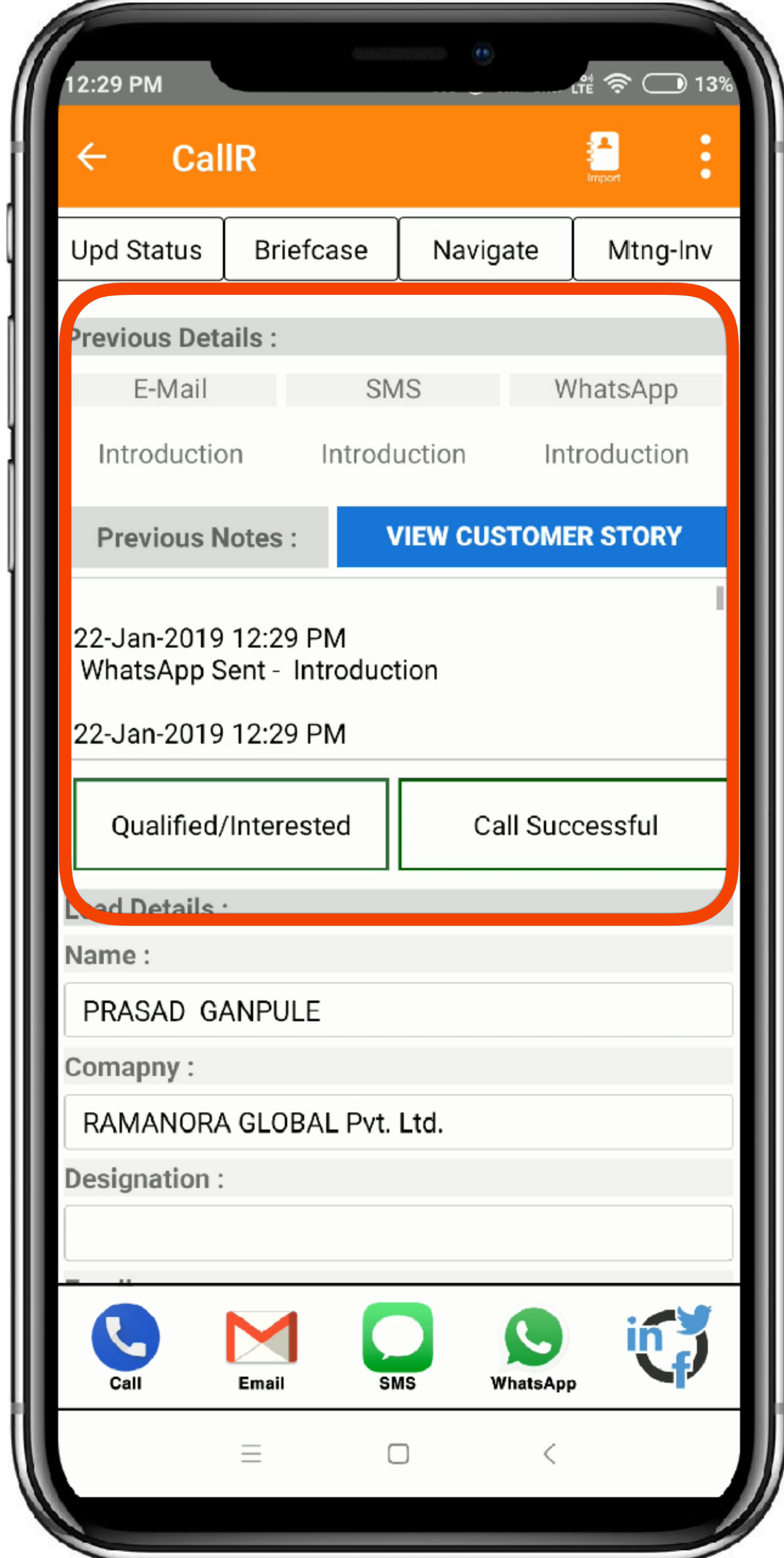
When WhatsApp has found the number, it will directly open the chat window for the number that was selected and will paste the Message into the send section of the app.

Once you confirm the content, you can click on **‘Send’** to send the WhatsApp message.



Step 43

click on '**Return**' to return back to the CallR App.



All Previous Details

This is your 'Previous Section' of the app, which will give you the last update of the Lead/Prospect FollowUp.

All the communication that was done, the recent Lead/Call status, everything can be seen here.

Social Media Connect

Now connect with your Leads and Prospects over Social Media channels such as

Facebook

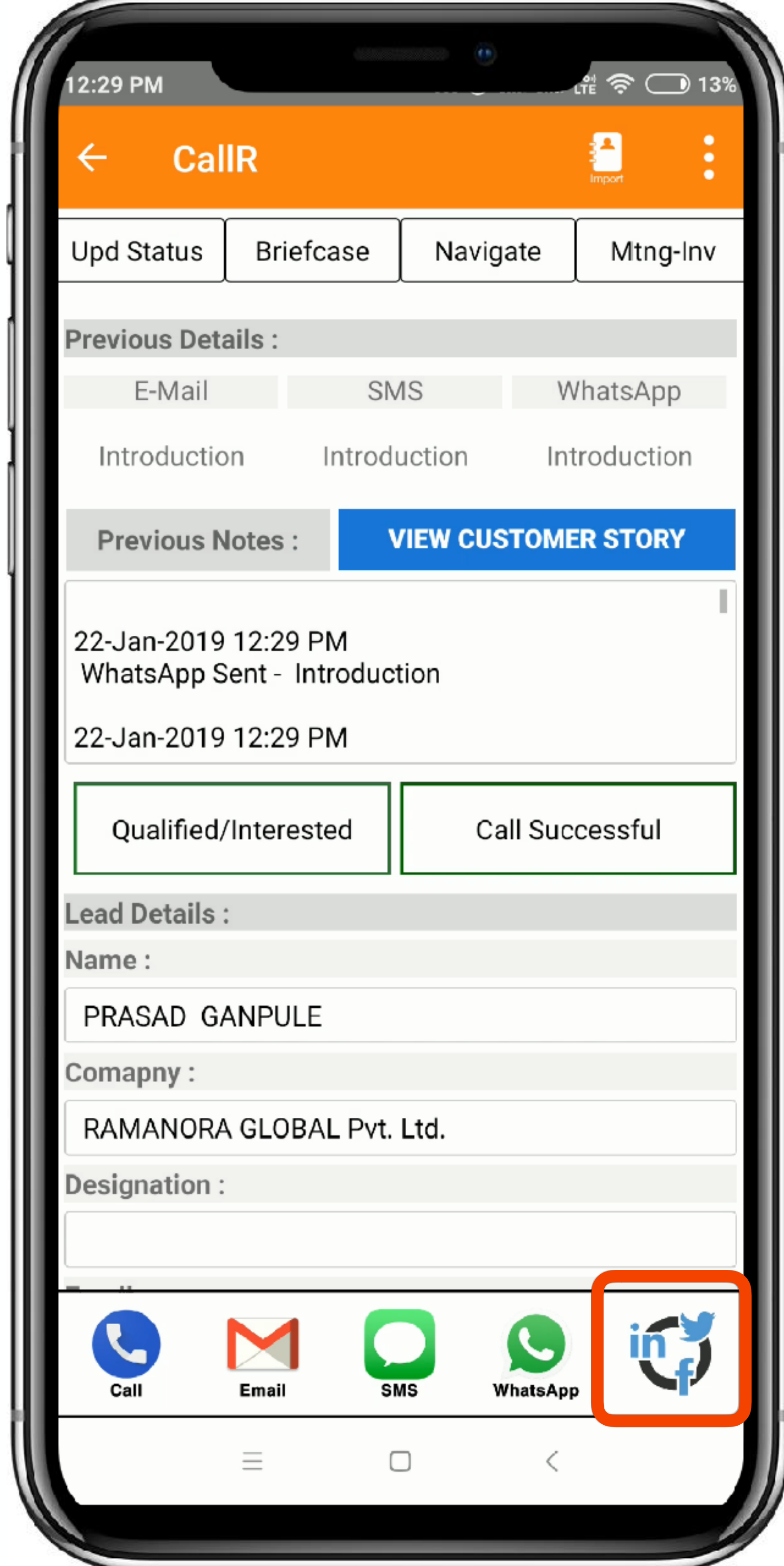
Twitter

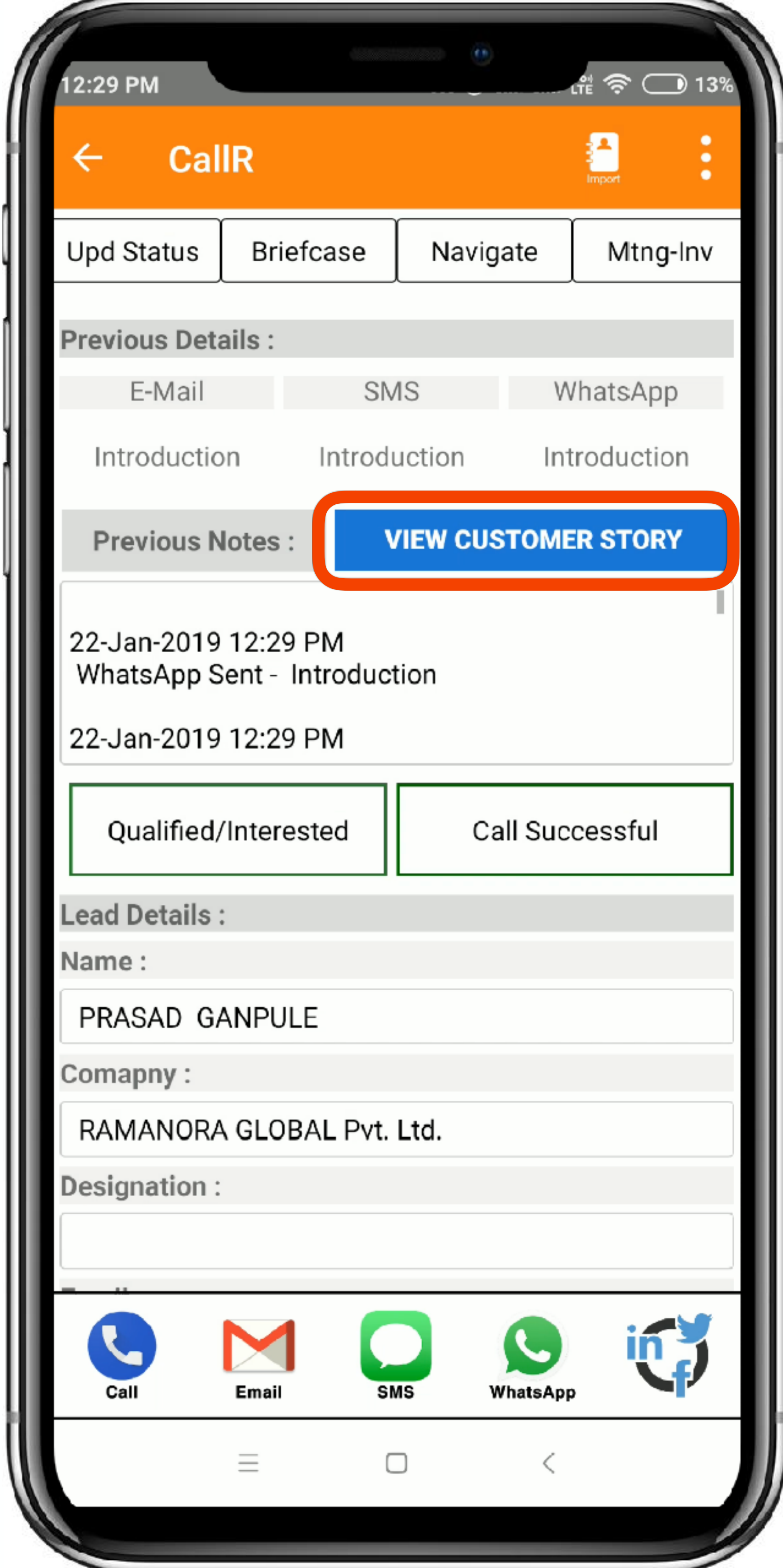
LinkedIn

Instagram

Google

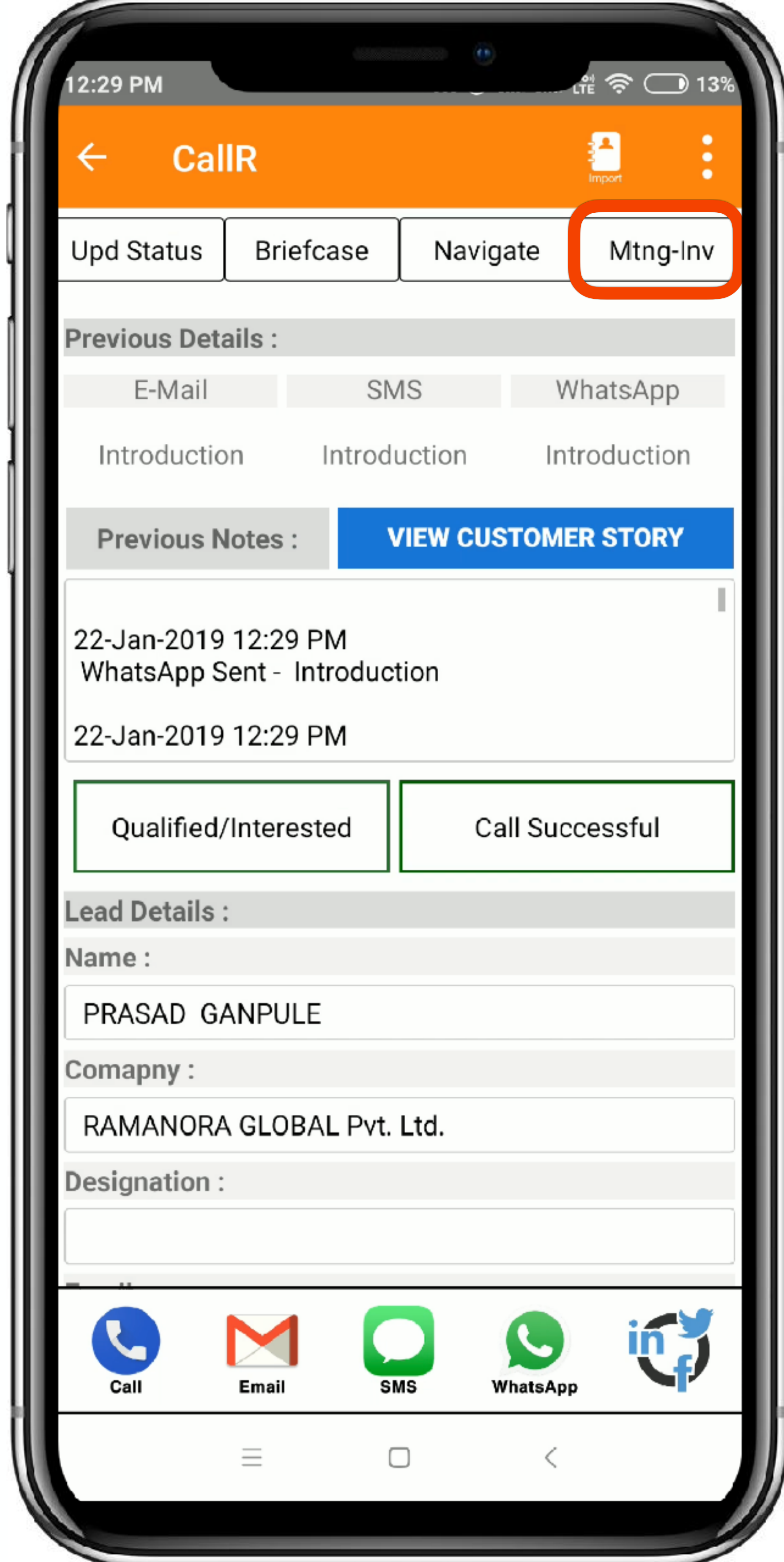
and More...





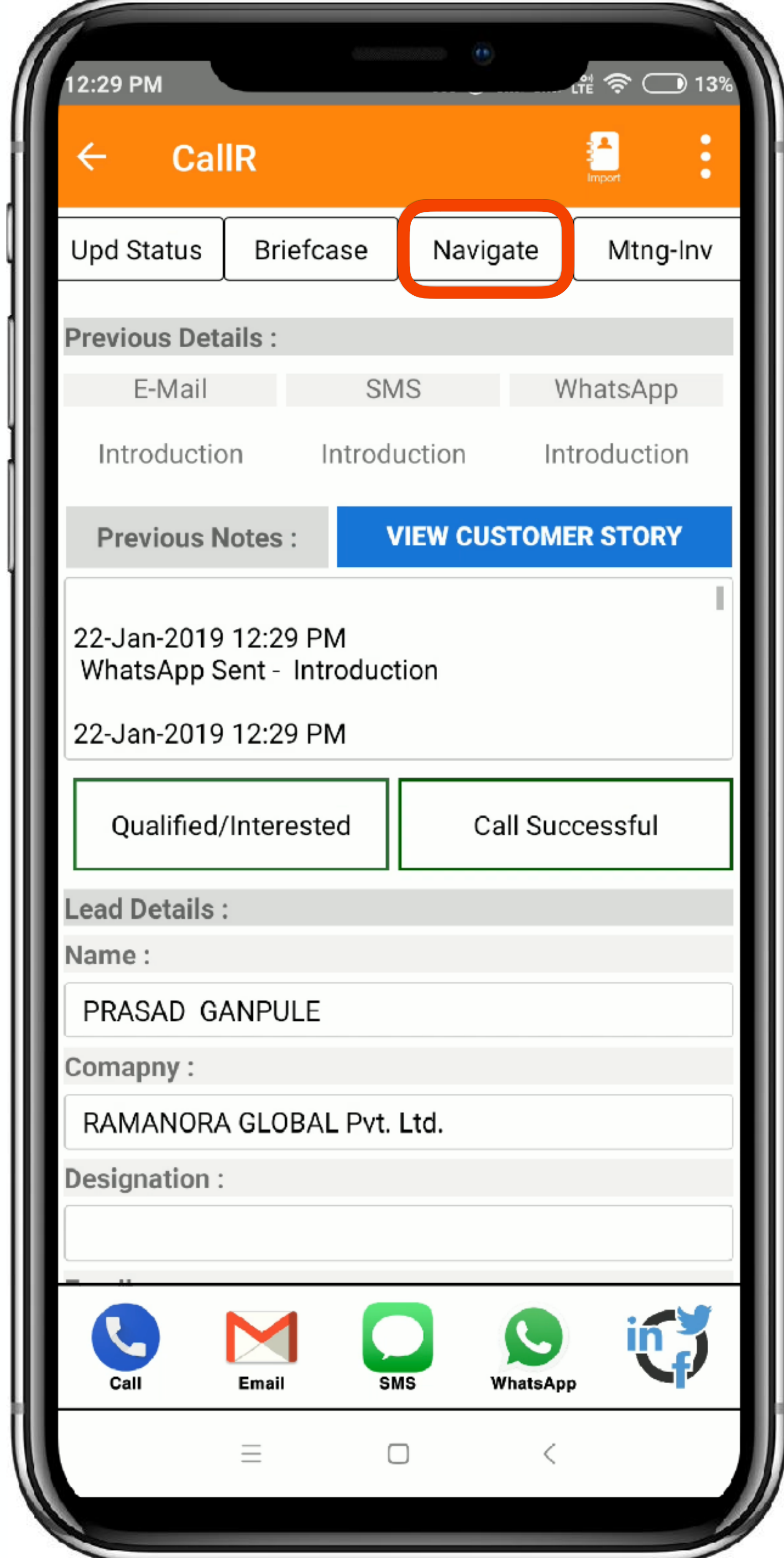
Customer Story

‘View Customer Story’ is one of the unique features of the LeadCon Sales companion as it gives you the complete story of the Lead/Prospect from Day 1 when the FollowUp began.



Send Meeting Invites

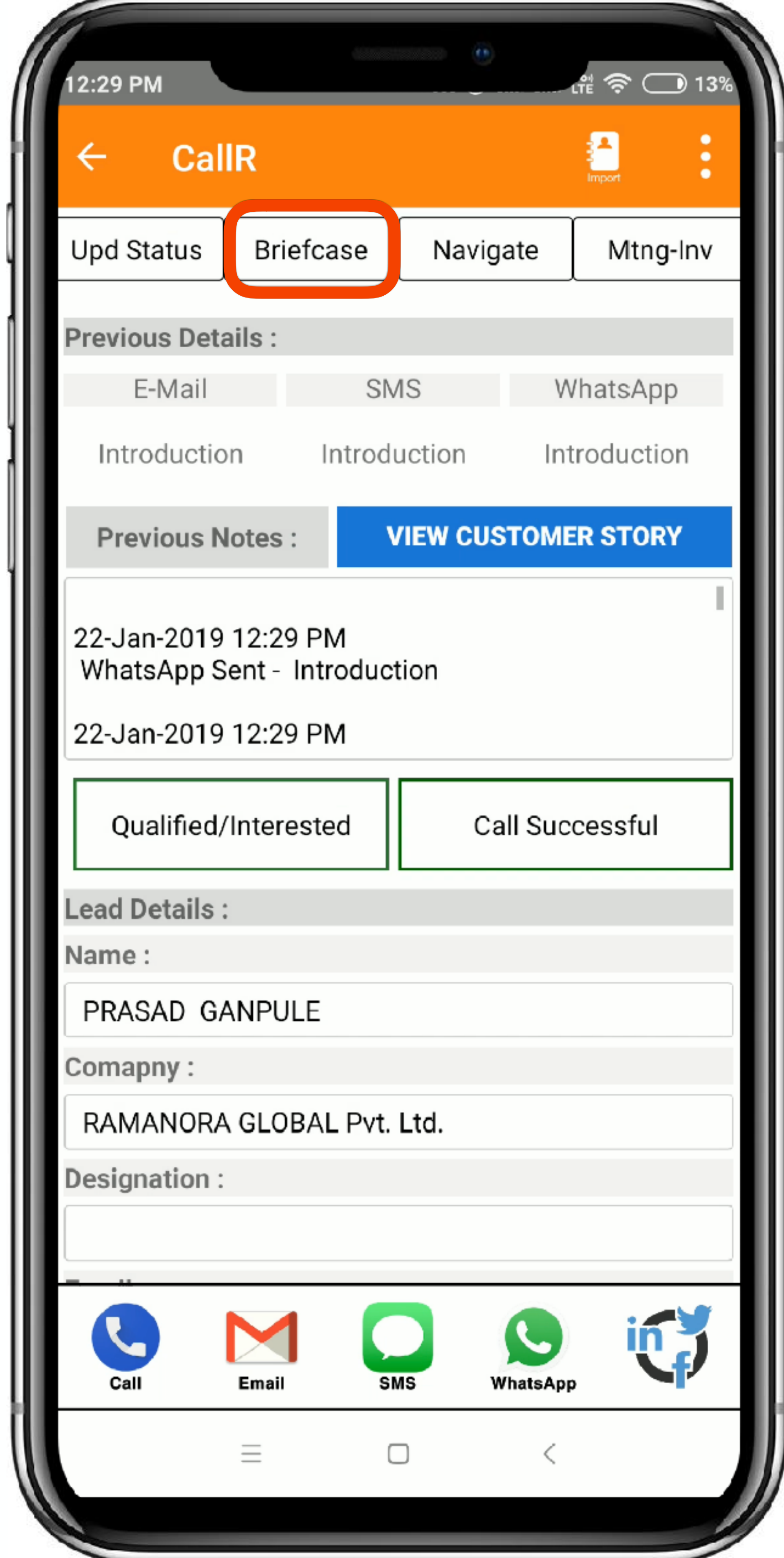
You can now send **‘Meeting Invites’** directly to the customers, via ‘eMail, SMS, Whatsapp’ and add the scheduled meetings into your calendar. with which you can take followup of the customer to reach in time and at the right place.



Get Navigated by Google

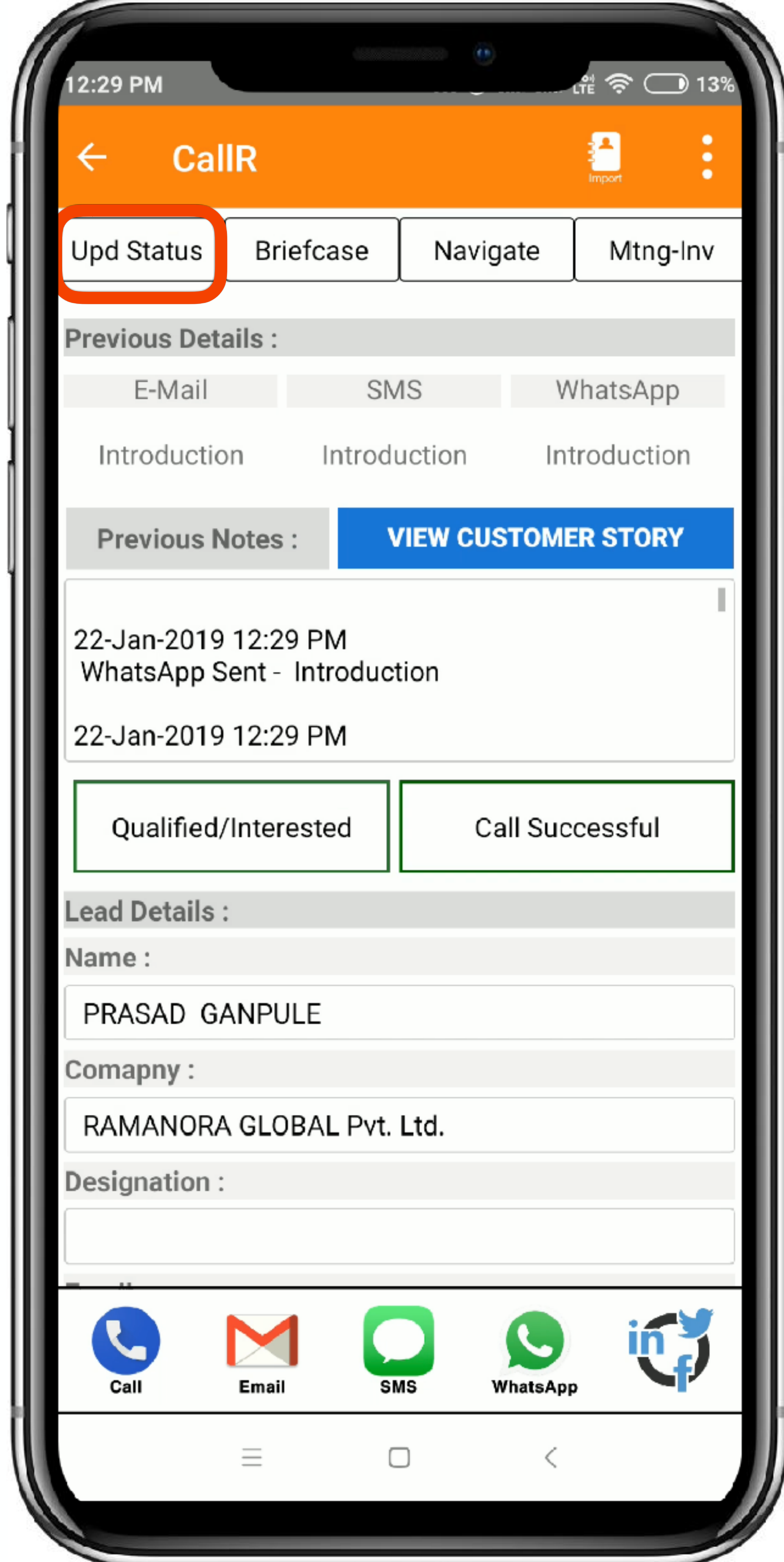
Now you can get
‘Navigated’ to the
customers place through
google maps.

You just simply need to
paste into the ‘search’ and
google maps will open the
navigation from your
position to destination.



Give Presentations

Add all your presentation in form of a PDF into the **‘Briefcase’** section which comes in handy during Personal visits and meetings with the customers.



Update Status

In case you had a meeting with the customer, you can directly update the meeting details through the

‘Update Status’

section of the app, which gets recorded into the ‘Customer Story’



Your Sales Companion!

Platform Access

You can check all the data on
the LeadCon Platform
For demo account
Login ID: manager@sales.com
Pass: password2
here:

<https://leadcon.co/>

You may watch Youtube Video Tutorials here

- Quick Demo of LeadCon (Step Wise) - <https://www.youtube.com/watch?v=iVOnJfFgsO0&list=PLCRT9gL7G7qxy1ICtqjDI1R6bf3rFWhex>
- LeadCon Demo (6 Minutes) - https://www.youtube.com/watch?v=UI1TvVZwL_M&t
- Detailed Demo (platform + Apps) - <https://www.youtube.com/watch?v=f5ctmDeG8AU&t>

Thank You!
for Choosing



LeadCon

Your Sales Companion!

We are committed in delivering the best solutions for you as we understand your struggle in sales and each update we work on delivers further simplification of tough methods which are easy in today's century.