

Customer Information Sheet

CIS No : 93191		Old CIS No :		CIS Date : 01-10-2018		Company		State Govt Servant – MPDO	
Prepared By : Sanjeet / Assigned To : Sanjeet / Reassigned To : Sanjeet						Business			
Customer Name And Address						Designation		Typist	
						Home Phone			
						Work Phone			
						Mobile		8074888783	
						Fax			
						Email		ssr19771972@gmail.com	
For Project		Projects Visited		Projects Liked		Interested In			
Enquiry Source		Enquiry Type		Lead Status		Prospect Status			
Classified Ad		Phone Call		Sale Closed		Excellant			
Brochure Sent		Executive Meet Customer		Visiting Card		Customer Visit Site			
Yes		Yes		No		Yes			
Company Type		Spouce Company		Purpose		Investment Details			
Housing Loan Required		Amount Required		Pre-sanctioned Obtained		Referred To Bank			
No				No		No			
Discount Expected		Discount Offered		Site Visit With		Bank Name			
				Not Visited					
Customer Requirement		Home Town		Other Info		Decesion Makers			
Company Address						Company Details			

Smart Text

Booked E-109

Customer Query

Customer Special Requirments

Remarks

Call/Entry Date	Call Details	
1-10-2018	Call Made By :	Call Type : NA
5-10-2018	OutCome Of Call :	
	Next Call Date : 07-10-2018	
	Target Of Call : first call detail to be entered	
5-10-18	Call Made By : Sanjeet	Call Type : Phone
5-10-2018	OutCome Of Call : mail forwarded to MD sir for advise	
	Next Call Date : 07-10-2018	
	Target Of Call : need to decide	
1-10-2018	Call Made By : Sanjeet	Call Type : Phone
2-10-2018	OutCome Of Call : Mr.Pramod-cashcow is dealing with loan and customer has given all her documents to them. waiting for response from cashcow	
	Next Call Date : 22-10-2018	
	Target Of Call : I am in contact with pramod of cashcow	
7-10-2018	Call Made By : Sanjeet	Call Type : Phone
7-10-2018	OutCome Of Call : waiting for sanction letter from pramod,	
	Next Call Date : 29-10-2018	
	Target Of Call : contact for updates on 29th oct from pramod-cashcow	
1-10-2018	Call Made By : Sanjeet	Call Type : Phone
1-10-2018	OutCome Of Call : Loan processing through Cash cow Pramod - waiting for sanction letter from banker.	
	Next Call Date : 02-11-2018	
	Target Of Call : contact for updates - both Mrs.devi and pramod-cashcow.	
1-1-2018	Call Made By : Sanjeet	Call Type : Phone
1-1-2018	OutCome Of Call : All the related documents from the client has been collected by cashcow executive and submitted with bank	
	Next Call Date : 15-11-2018	
	Target Of Call : Cashcow promised to get loan sanction letter in 2 days.	

sanctioned copy to me and I have given the same to Mrs.Devi. She is coming to stie on 29th nov 2018 for final call.

Next Call Date : 29-11-2018

Target Of Call : waiting for booking 29

2-12-2018	Call Made By : Sanjeet	Call Type : Phone
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1-12-2018	OutCome Of Call : coming today for signing the booking form
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Next Call Date : 02-12-2018

Target Of Call : she is coming around 3 pm for signing the booking form.

2-12-2018	Call Made By : Sanjeet	Call Type : Phone
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2-12-2018	OutCome Of Call : Booking form signed for E-109 vista
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Next Call Date : 02-12-2018

Target Of Call : Booking concluded
