SanE-Visa

Best CRM for Immigration Consultant

Benefits

User Friendly

Cost-Effective

Platform Independent

SAN Softwares presents **SanE-Visa (Immigration CRM Software).** SanE-Visa software is a kind of managing tool to manage the client details and their visa updates. This Software is based over cloud technologies are basically to serve the immigration and visa consultancy services. It's amazing and interactive user interface with web portals brings the life to your immigration services. You can manage the whole documentation procedures by following up with the client details as well as tracking their financial stages too.

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Main Features

Multi Branch	**Multi User**
User Role Management	**SMS, WhatsApp API integration**
E-Mail Integration	**Click To Call API Integration**
Accounts And Operations Dashboard	**Lead Management**
Case Management	**Case File Management**
Case Followup	**Track Client Status**
Status wise file assign to users	**Fee Structure**
Visa Type	**Document Management**
Invoicing	**Payments Management**
Case And Clients Report	**Lead Report**

Other Features

- Client & Agent Notification
- Client Ledger
- Dynamic Lead Allocation Logic

- Data Import in CSV
- Excel Report
- Automatic Lead Management

Case Management

- Lead Cases
- Invoicing
- Sub Cases
- Case Status Tracking

Report Management

- Client Report
- Invoice Report
- Case Report
- Payment Report

Integrations

- WhatsApp Business Integration
- Payment Gateway Integration
- Portal Lead Integration (Facebook, Website, and 3rd Party Lead Integration)

Task Management

- Task Type
- Task Status
- Branch Wise Case Management
- Hierarchy Management

![SanE-Visa logo]

# Operation Dashboard

Account Dashboard
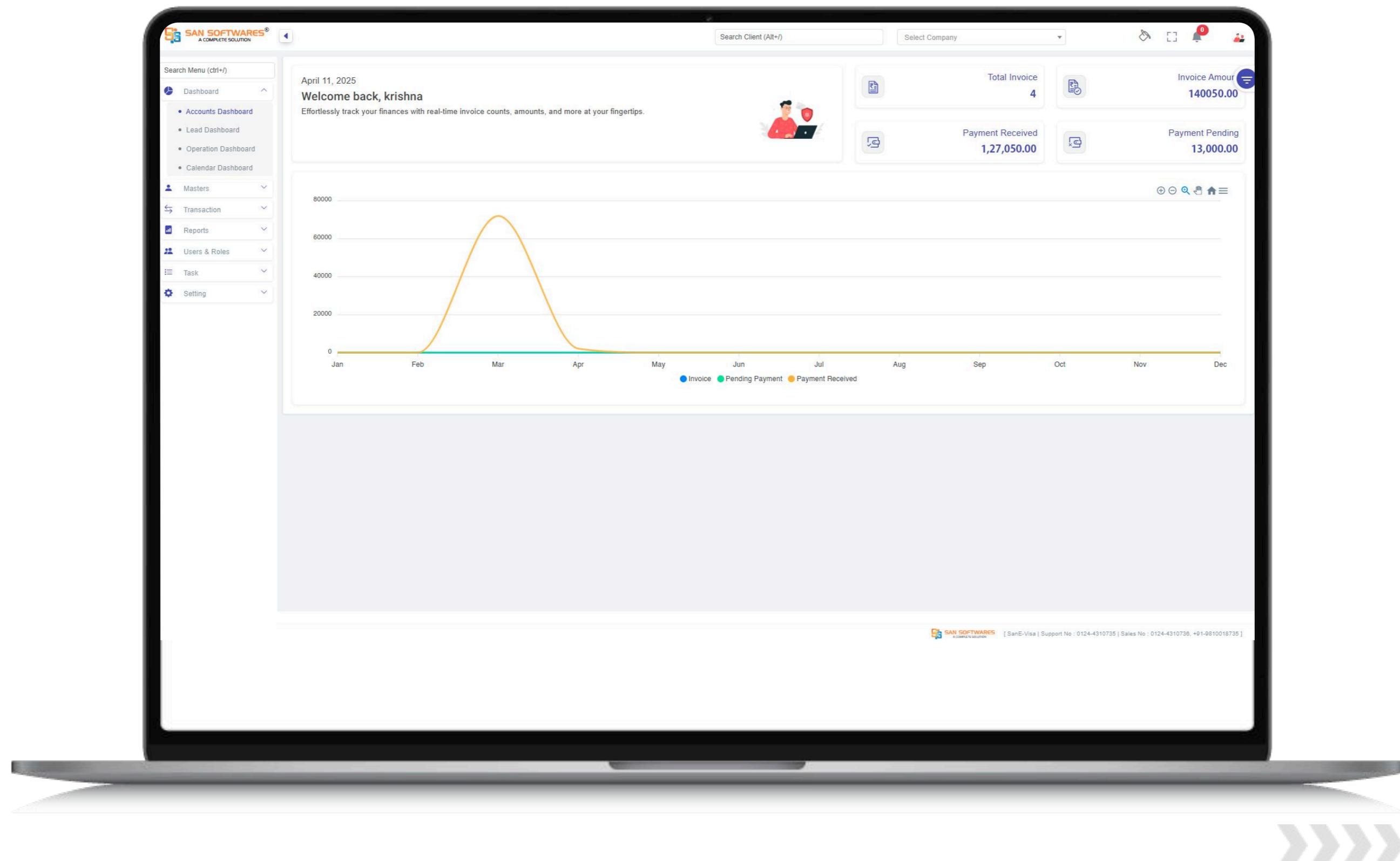
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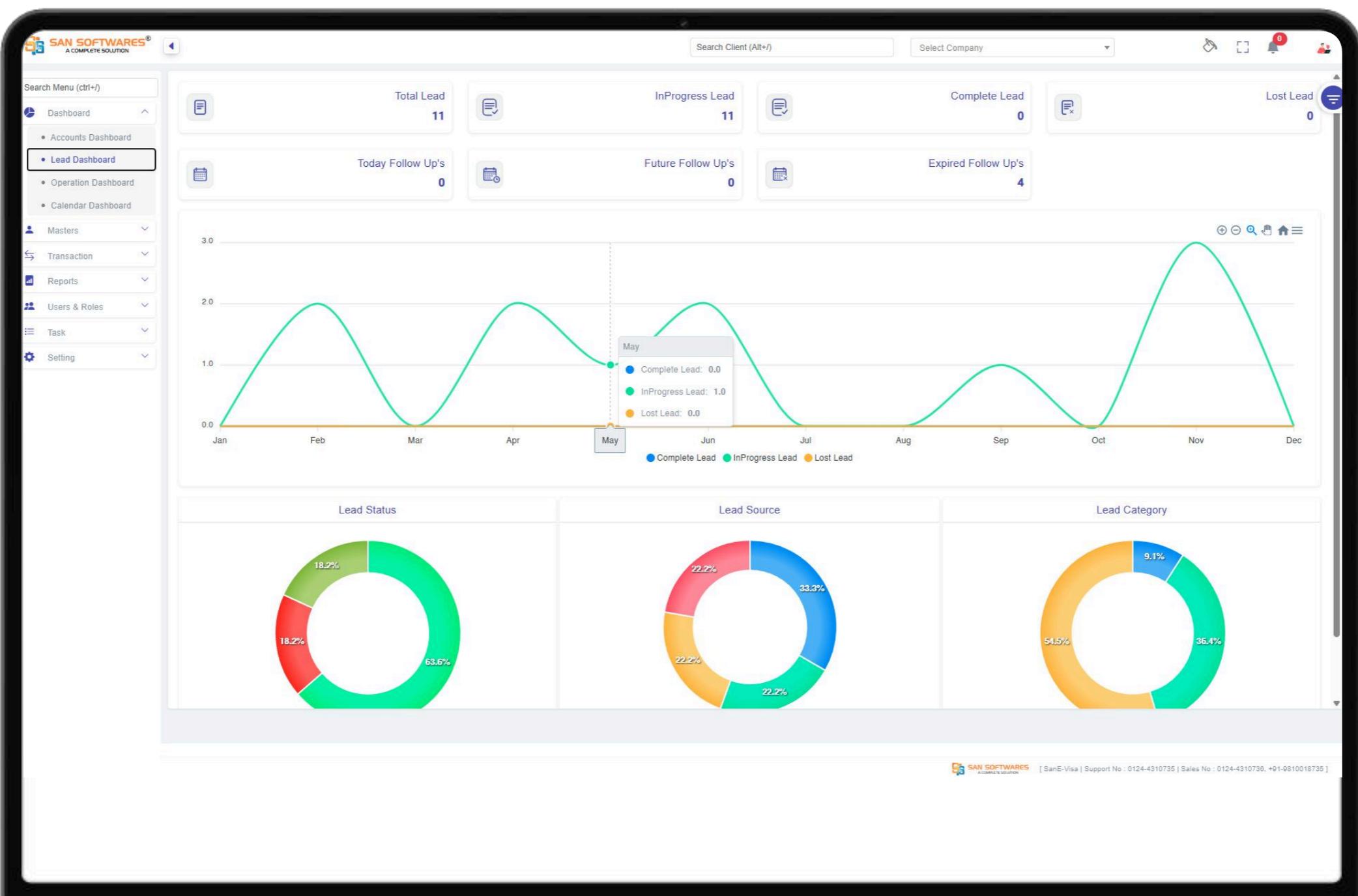
SanE-Visa

Lead Dashboard

Calendar Dashboard


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Users Roles

Client/ Vendor Details
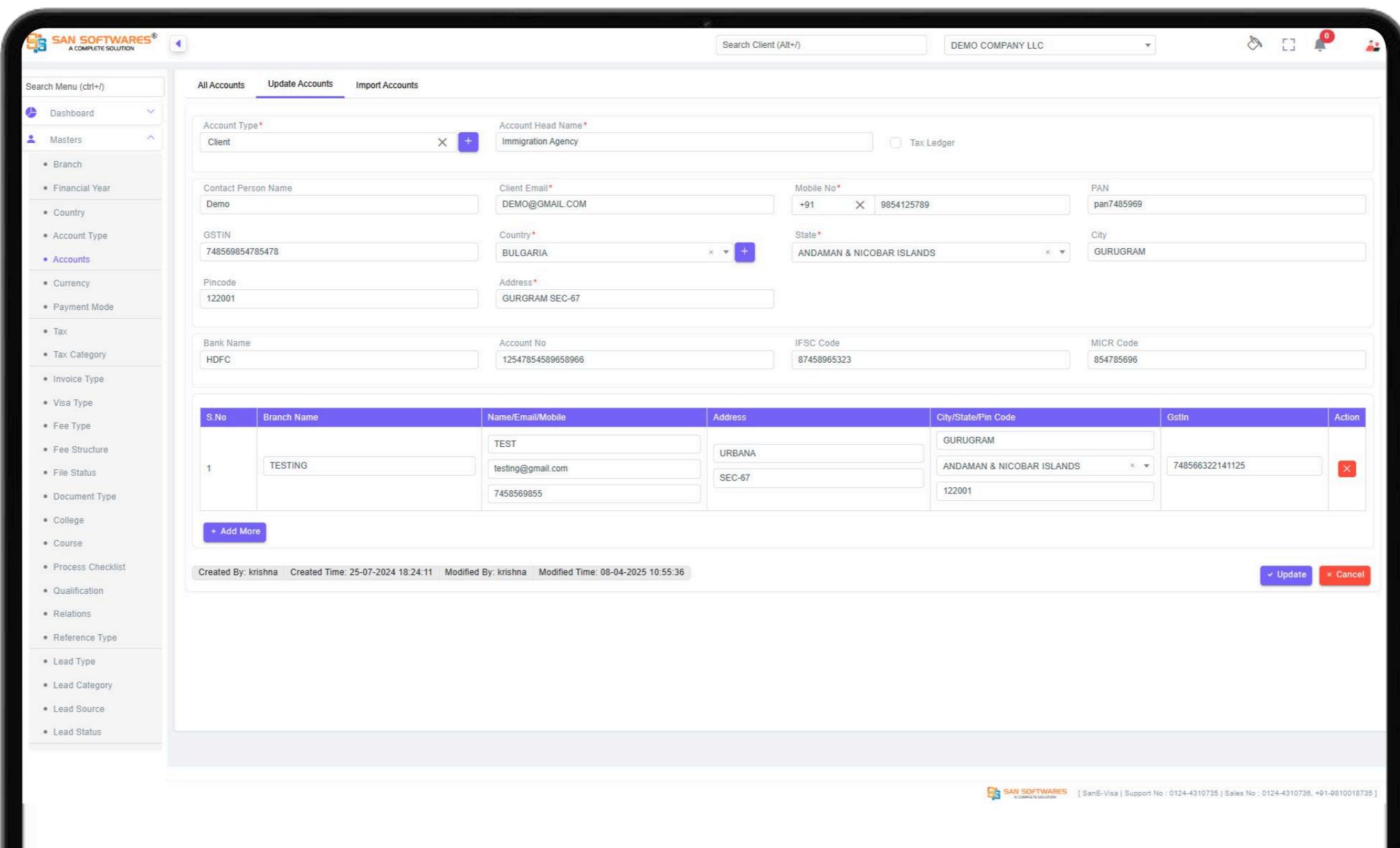
Cases List

Personal Information


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Fee Structure

Invoice

Operation Dashboard

Total Cases 11	Assigned Cases 11
Pending Cases 9	Today Follow Up's 0
Future Follow Up's 0	Expired Follow Up's 6
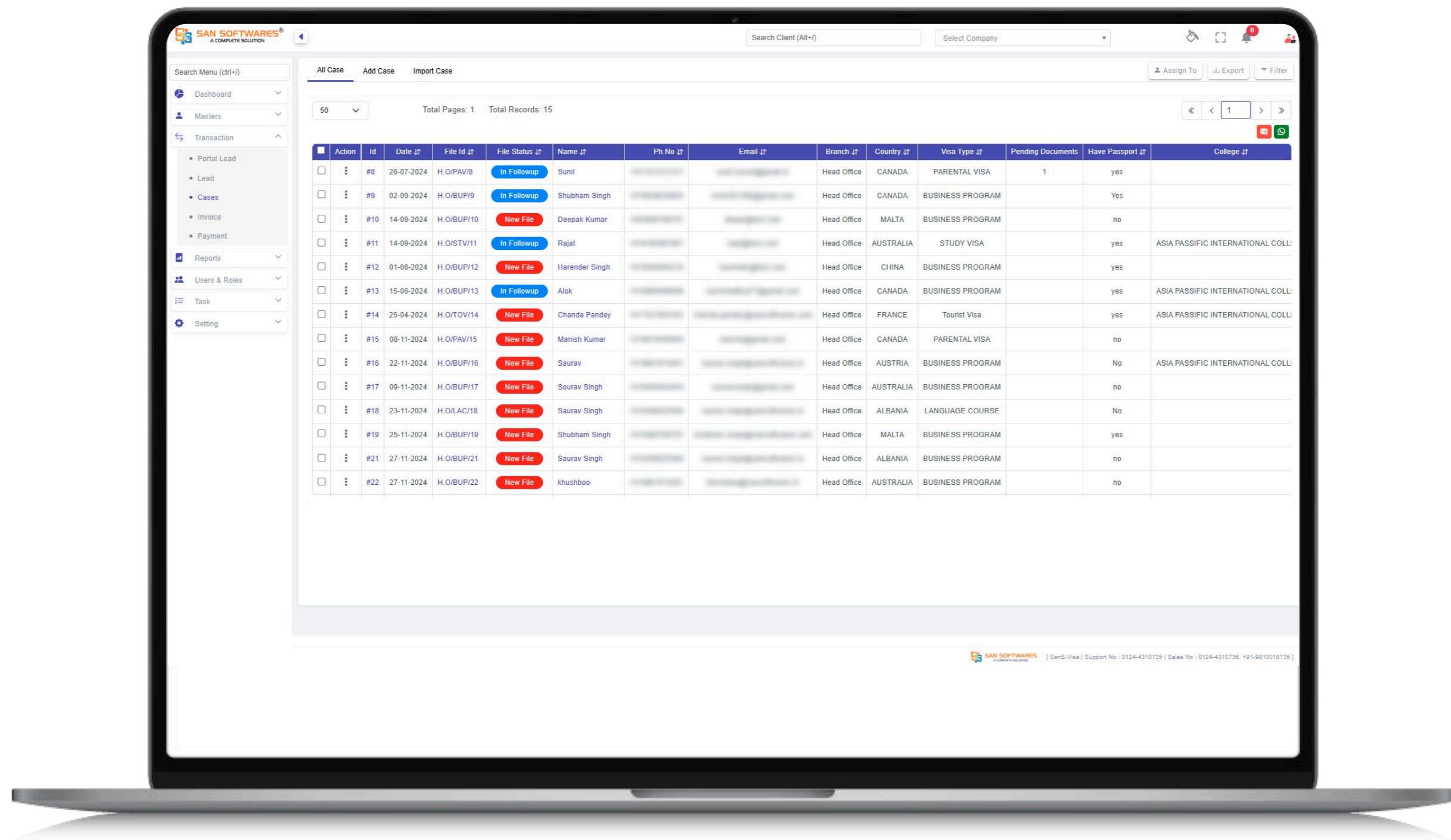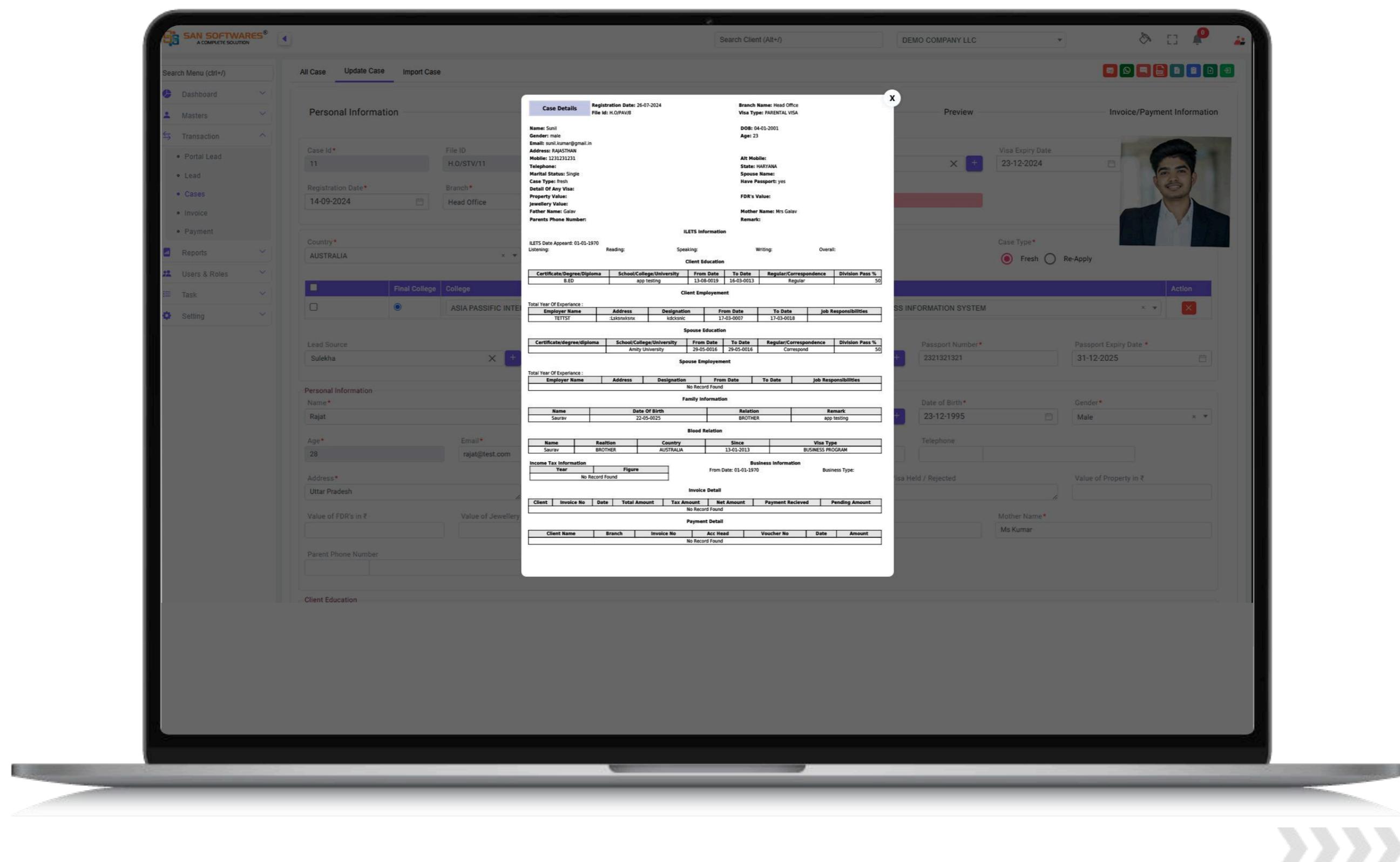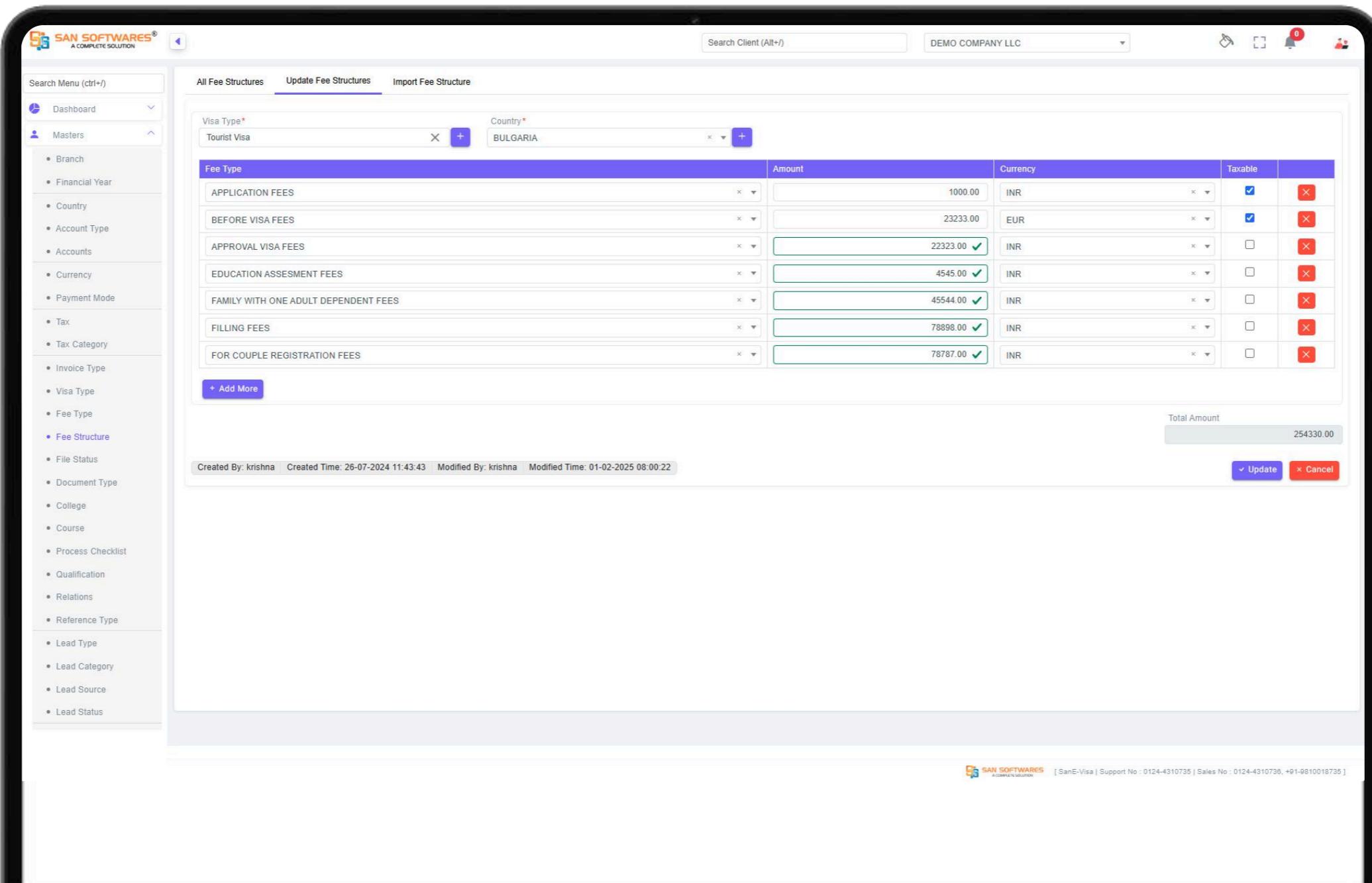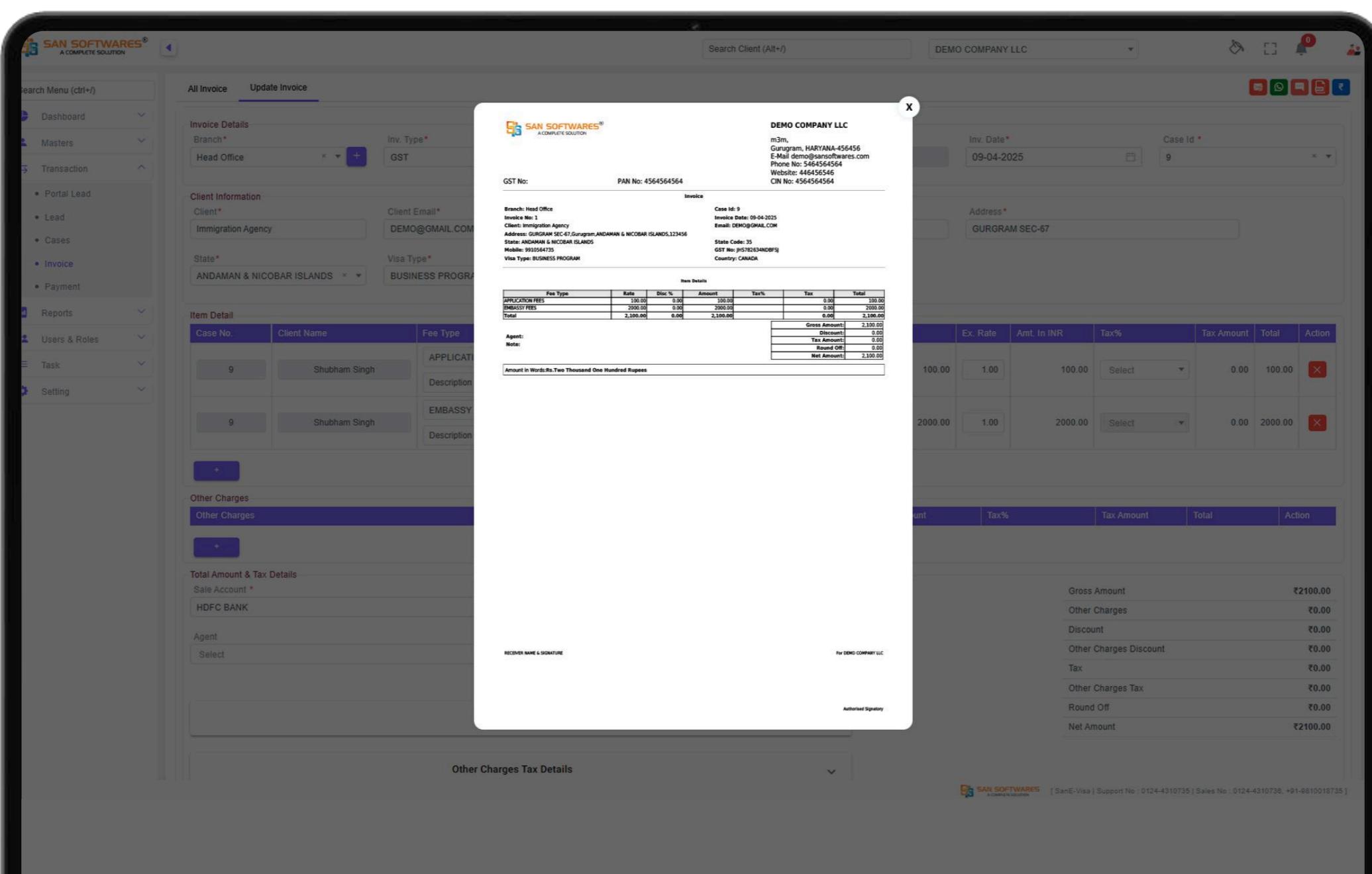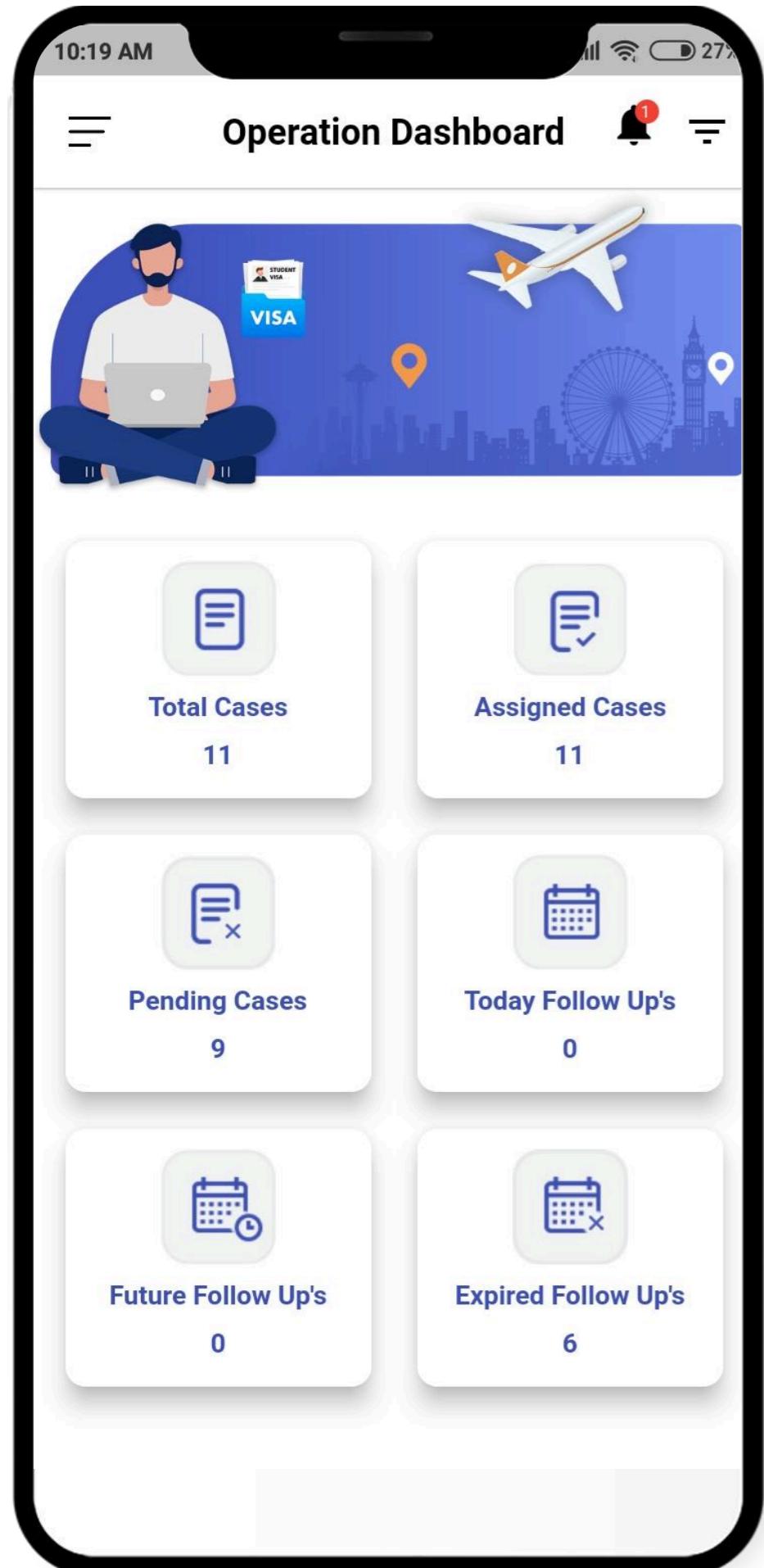
Operational Dashboard

Cases

Case Id File Id Date	Name Branch Country	Visa Type Assign To	File Status Remarks	Action
94 COCH/BUP/94 25-12-2021	Rahul COCHIN CANADA	BUSINESS ... Saurav singh	New File	
97 COCH/STV/97 05-12-2022	Vishal COCHIN FRANCE	STUDY VISA Saurav singh		
95 JAM/PAV/95 24-05-2023	Manish JAMMU CHINA	PARENTAL VISA Saurav singh		
91 VADOD/STV/91 18-05-2023	kishan VADODRA CYPRUS	STUDY VISA Saurav singh		
90 VADOD/STV/90 01-01-1970	kishan VADODRA CYPRUS	STUDY VISA Saurav singh		
85 LKO/BUP/85 01-04-2023	Mr. Mukul LUCKNOW ENGLAND	BUSINESS ... Saurav singh		
79 LKO/PAV/79 17-05-2023	Kishan LUCKNOW IRELAND	PARENTAL VISA Saurav singh	New File	
86 LKO/PAV/86	Mr. Krishna Pratap Singh LUCKNOW	PARENTAL VISA Saurav singh	Visa	

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|< < 1 > >| 10

Cases

Invoice

Id Case Id Client	Invoice no Date	Total Amt Tax Amt Net Amt	Payment Rec. Pending Amt	Action
5 30 Immigration Agency	JAN/2023/1 01-02-2023	116466.00 30114.78 146580.78	147130.04 -549.26	
6 59 Immigration Agency	1 16-01-2023	50000.00 9000.00 59000.00	0 59000	
7 30 Immigration Agency	JAN/2023/2 18-01-2023	216466.00 49529.01 265995.01	449.26 265545.75	
Total		382932.0 88643.79 471575.79	147579.30 323996.49	

Invoicing

Available for Apple and Android

Mobile App
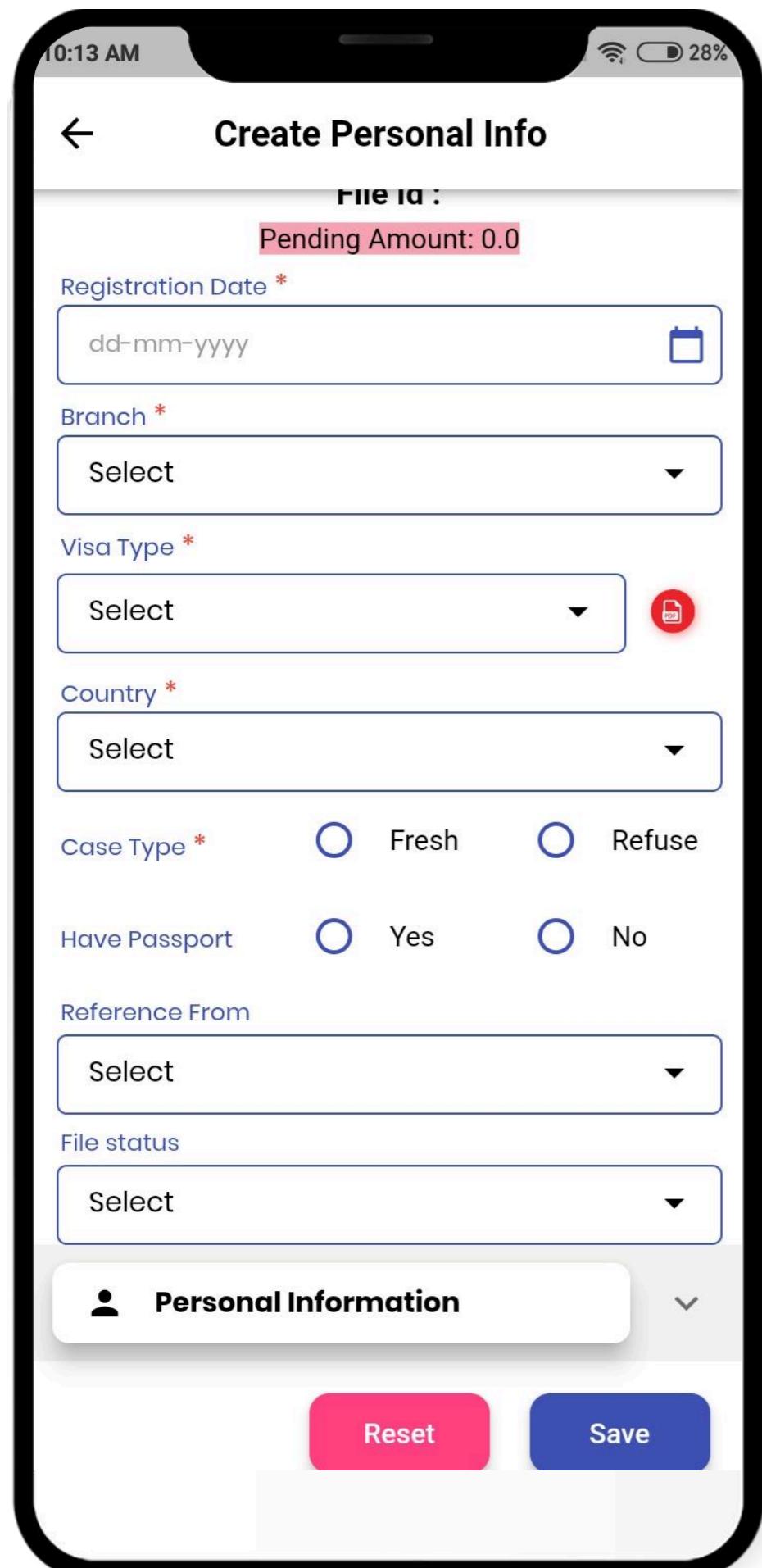
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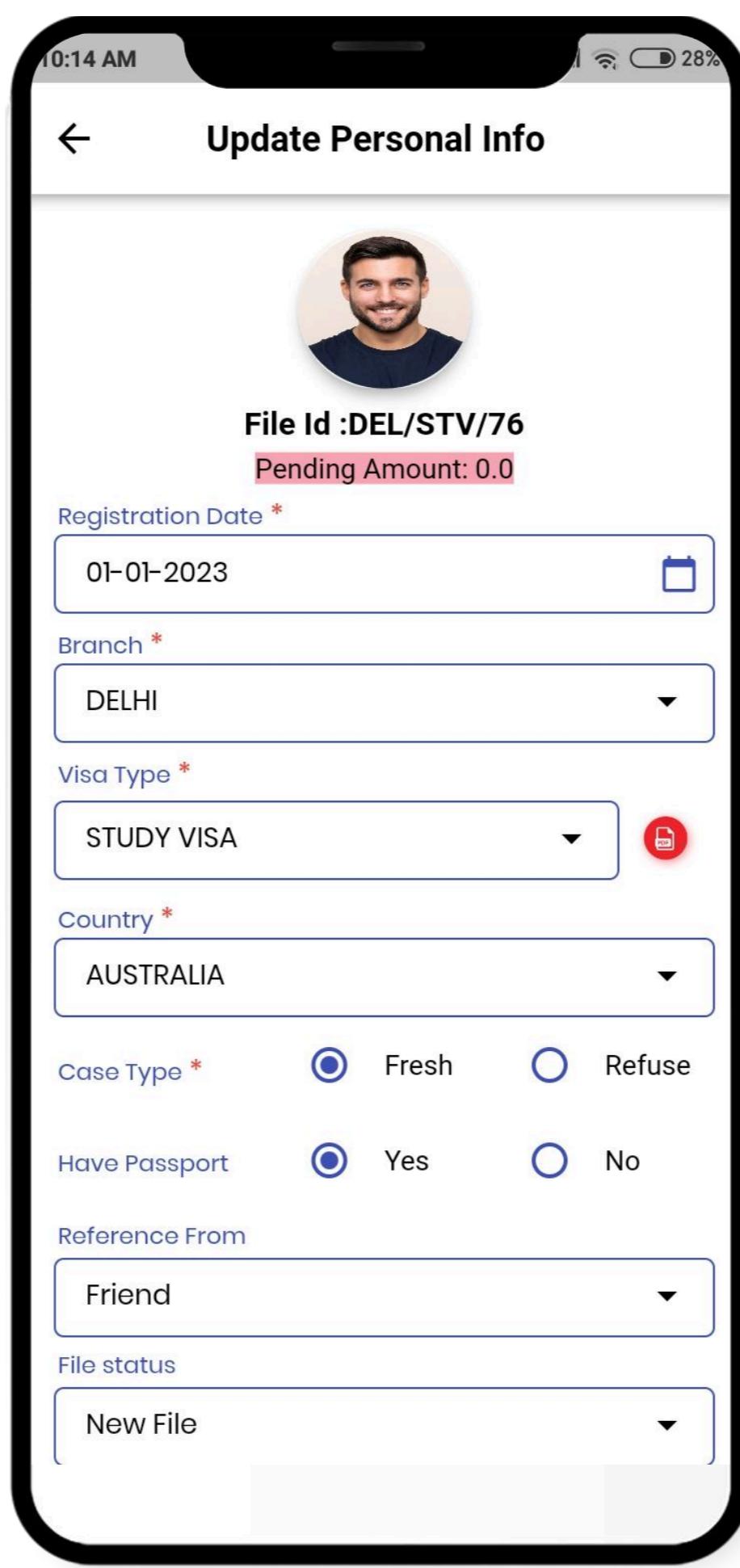
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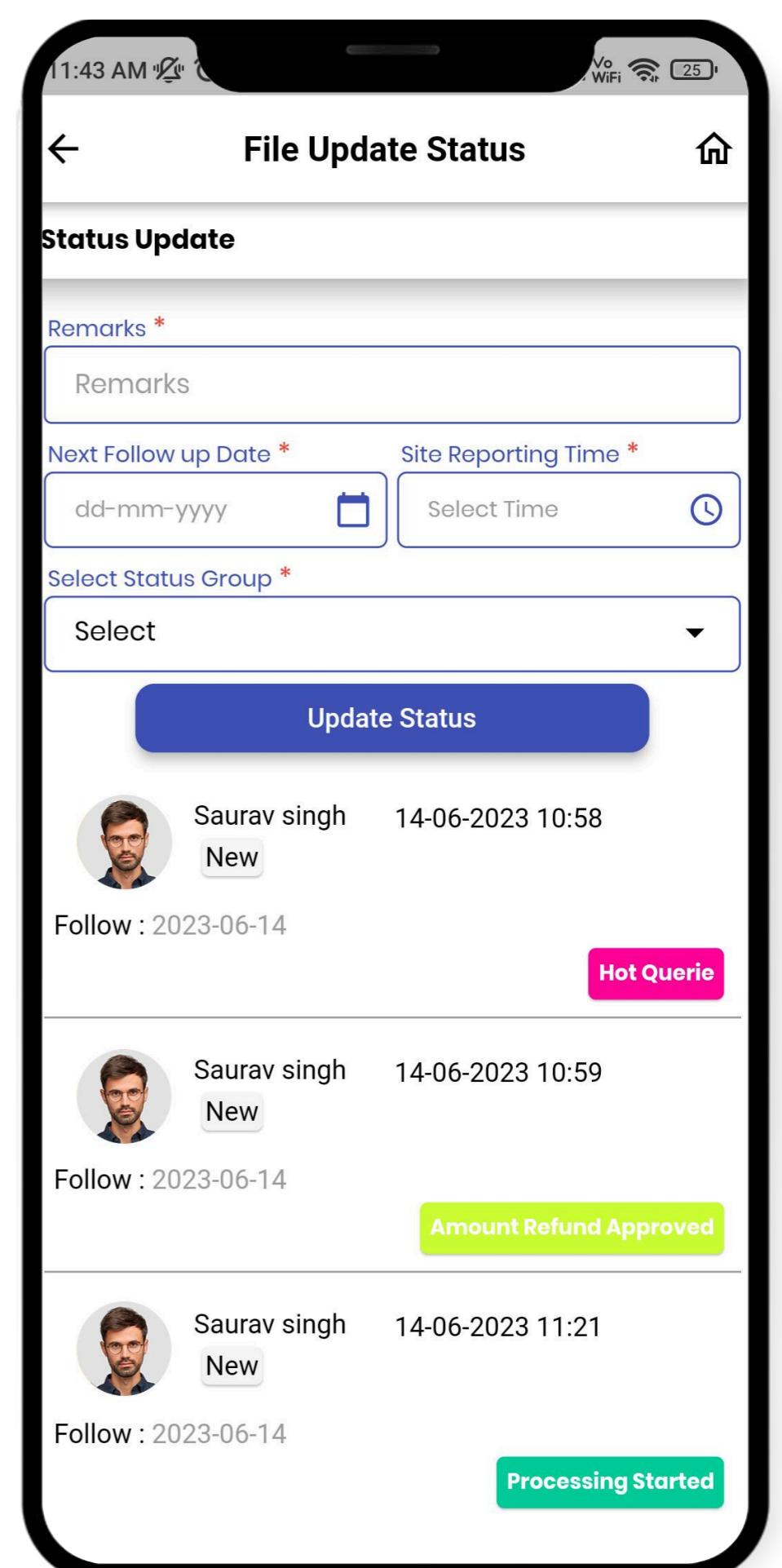
File Update Status

Available for Apple and Android

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Lets Get Connected
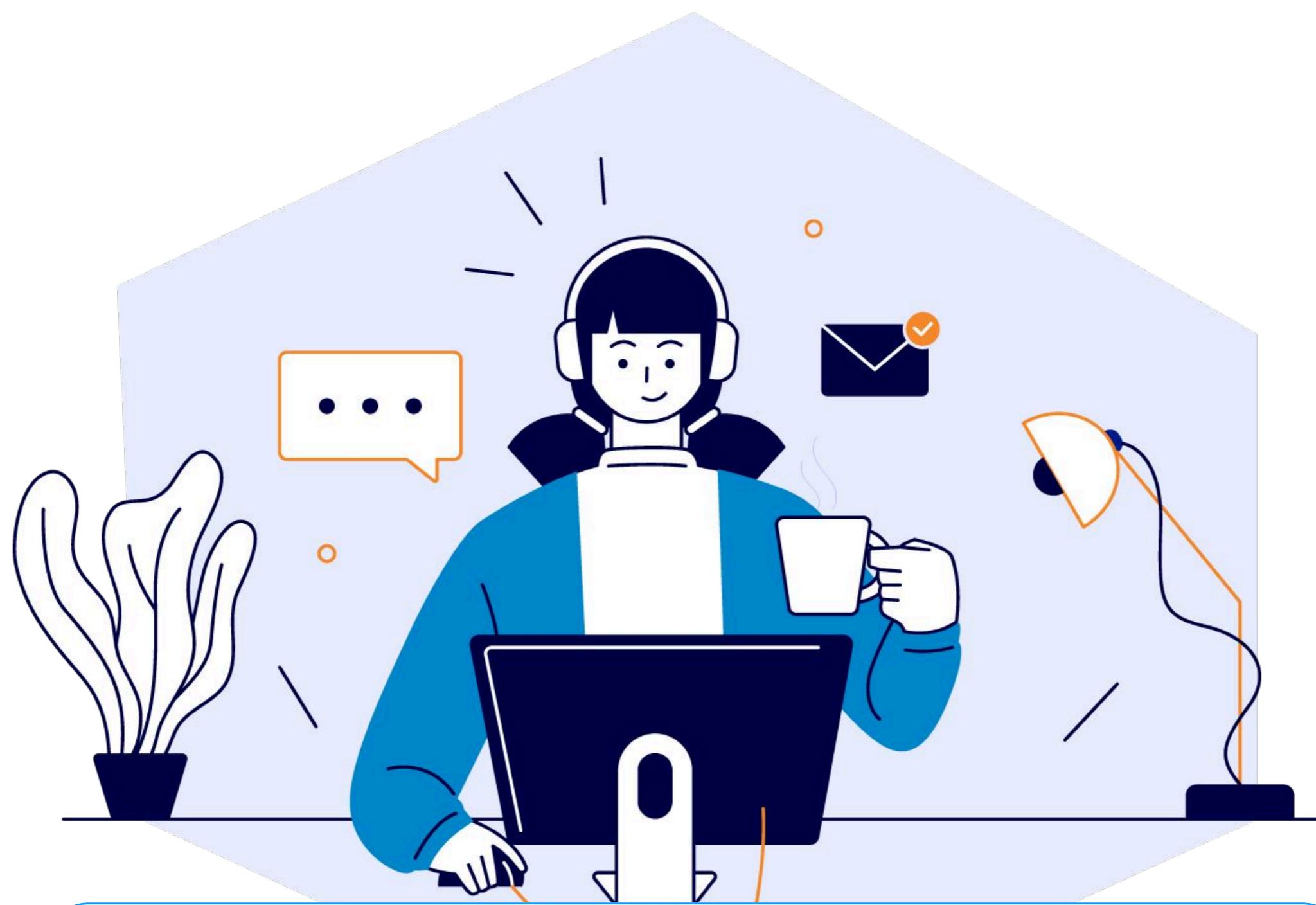
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sales@sansoftwares.com

Thank You