FINBYZ TECH PVT LTD

STEER YOUR VISION

LEAD INTELLIGENCE

Overview

This process captures inquiry emails and extracts key details such as name, email address, phone number, company, location, and inquiry content using AI. The system then checks whether the contact already exists.

if found, it links the inquiry to the existing customer or lead.

If no match is detected, a new lead is created, and depending on the availability of details, a new contact and address may also be generated.

All information is organized into customers, leads, contacts, addresses, and opportunities, ensuring accurate records without manual intervention.

Workflow Steps

1. Setup Email Account in ERPNext

1. Navigate to **Settings → Email Account → New**.

2. Enter mailbox credentials

3. Save and test connection.
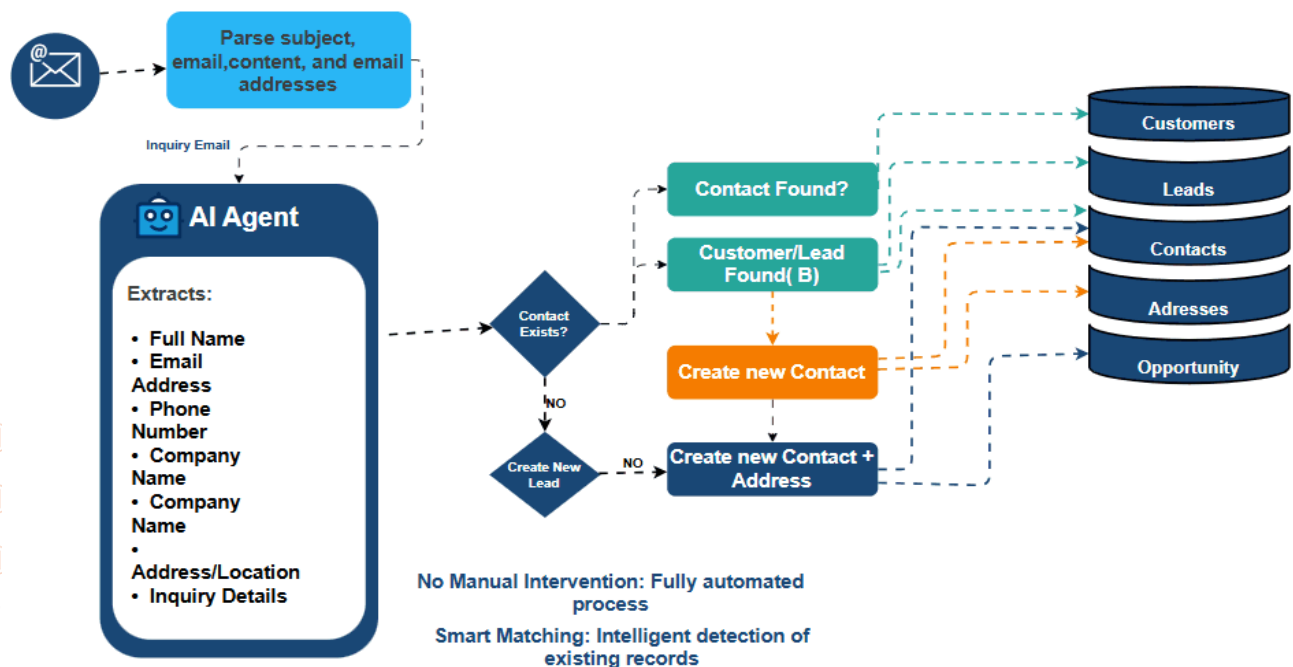
2. Create Labels in Your Email Account

1. Log in to your email provider (e.g., Gmail, Outlook, Zoho).

2. Create labels/folders such as:

    a. Inquiry

    b. Other

    c. Spam

    d. Internal

3. Add filters/rules in your mailbox so that incoming emails are automatically moved into the correct label/folder.

     a. Example: If subject contains "Requirement" → assign label Inquiry.

4. These labels/folders will be available through **IMAP**. ERPNext can be configured to read from the required folder.

3. Connect AI Email Classifier

1. Ensure your AI Classifier is integrated with ERPNext via API or webhook.

2. Classifier must tag emails into categories:

     a. **Inquiry** → Eligible for this flow.

     b. **Other** → Ignored in this flow.

Automated Pipeline: From email → ERP opportunity

Benefits

- Ensures zero missed inquiries
- Automates lead-to-opportunity pipeline
- Reduces manual data entry
- Keeps ERP records clean and updated
- Improves sales response time