questico.site

Quotations & Estimates

User manual

Inside your tool it is called “Anuman”.

A quotation builder for interiors studios and contractors that prices jobs room by room from your own rate library, keeps every revision, and prints a branded proposal.

1. Your tool at a glance

Anuman lets a studio price a job room by room from a standard rate library instead of rebuilding each estimate in a spreadsheet. Every version the client has seen is kept as v1, v2, v3, and the proposal prints with GST, a payment schedule and the studio's branding. The owner sees which sent quotes need a follow-up today, which are about to expire, and how many get accepted.

Made for: Home-interiors studios and contractors with a few designers and a manager. The sample business is an interiors studio in Bengaluru with a principal designer, a studio manager and interior designers.

Who can do what

Your tool has 3 role profiles. Everyone signs in with their own email address and sees only what their role allows.

Role	Usually	Can	Cannot
Owner	The principal designer or studio owner	• Do everything a manager can • Give a person access from the tool's Team screen: saving them sends the invitation to their email address • Remove a person's access by unticking Active	• —
Manager	A studio manager	• Do everything a designer can • See everyone's quotes on Today and in the Quotes list • Add, edit and delete rate library items • Give any discount • Choose or change the designer on a quote • Undo an Accepted or Declined decision • Delete a quote • Open Reports and the Team screen • Enter the bank details shown on proposals	• Give new people access (they see 'Only the owner can give new people access.')
Designer	Interior designers who prepare quotes	• Build, revise and send their own quotes • Open and print any quote • Edit colleagues' quotes, only if the owner turns on that setting • Give a discount up to the limit the owner sets • Browse the rate library • See their own clients, or switch to everyone's	• Give a discount above the limit (they see 'Discounts above X% need a manager') • Change the rate library • Delete a quote, undo a decision or change the designer on a quote • Open Reports or the Team screen

What staff can do in each list

These rules are kept by Questico's database, not only by the screens: a staff member who finds a way past a screen is still refused. They are for staff: owners and managers are not held to them.

Quotations

- Staff see every entry.
- Staff can add entries in their own name.
- Staff can change only their own entries.
- Staff can't delete entries.
- An entry is a staff member's own when they own the quote.
- Once saved, staff can never change the designer who owns it and the quote number.
- Staff may add to the activity log, never rewrite or remove what is there.
- Turning on “Designers can edit a colleague's quotes” in the admin panel gives staff more room here.

Rate library

- Staff see every entry.
- Staff can't add entries.
- Staff can't change entries.
- Staff can't delete entries.

Team

- Staff see every entry.
- Staff can't add entries.
- Staff can't change entries.
- Staff can't delete entries.

Business details

- Staff see every entry.
- Staff can't add entries.
- Staff can't change entries.
- Staff can't delete entries.

2. Getting started

Ready when you buy

- Your business name (and its short form) is set from checkout, and your contact details replace the demo's.
- The demo business is gone: its people, customers, vendors and figures are not in your copy. City and address start empty for you to fill in.
- Lists such as departments start with a common set; change them to match your business in the admin panel.
- Your GSTIN from checkout is already on your quotations.

Where your tool lives

- Your tool has its own address, such as yourbusiness.questico.site. Open it on a phone or a computer.
- You can also open it from your Questico account: Your space → Paid, or your console, where the tool shows three buttons: Open the tool, Edit website (the admin panel) and Team.

Signing in: there are no passwords

- Everyone opens your tool’s address and presses Sign in, then signs in with the email you added for them, in one of two ways.
- With Google: press “Continue with Google”. For a Gmail address, or a work email that is a Google account (Google Workspace). Google looks after the password and security.
- With any other email (Outlook, Zoho, your company’s own mail): under “No Google account? Use any email”, type the address and press “Email me a code”. Questico emails a 6-digit code; type it in and you are in. The code works once and expires soon.
- Someone who signs in but has not been added sees “You’re signed in, but not invited yet” until you add their address.

Adding your team

1. One person at a time: inside the tool, open Team and add their name and email address, and choose Designer or Manager. Saving gives them access and puts them on the tool's own list.
2. Everyone at once: in your Questico console, open the tool's Team section → Add many from Excel. Download the template, fill one row per person (name, email, access, and if you like mobile, department, designation and joining date), and upload it. You see every row checked before anything is added. Uploaded people get access and appear on the tool's own list too.
3. Your whole company, for all your tools: Your space → Your company team. Upload your staff sheet once (name, email, employee ID, department, designation, function, mobile, joining date, access, and Active or Left), then press Apply beside each business tool. New people get access and appear on the tool's own lists. Applying never changes the access someone already has in a tool. To take someone off, mark them Left: the next Apply removes their access, and their past records stay. Someone simply missing from a new sheet is not treated as having left.

Partners as owners

- If you run the business with partners, make them owners too: in your console, the tool's overview has an Owners card. Type a partner's email and press Add an owner. Up to five owners in all.
- They become owners the next time they sign in to Questico with that email, and can then do everything you can: the admin panel, the team, and asking for changes. The tool shows in their own Your space under Sites you co-own.
- Any owner can remove a co-owner, and a co-owner can leave. The person who bought the tool always stays an owner.

Sending the invitation, and seeing who has joined

- Questico emails each person an invitation as soon as you add them, however you add them: one at a time, from Excel, or from your company team. It tells them your tool's address and how to sign in, with Google or with a code.
- In the console's Team section, "Remind the N not signed in" emails everyone who has not joined yet. Under "Send the invitation" you can also copy the ready message for your team's WhatsApp group.
- The same page counts who has joined and who has not signed in yet, lists everyone with the date they were invited and the date they joined, and downloads the list for Excel.
- To change someone's access or remove them, use the tool's Team screen or the console's Team section. Their past records stay.

The emails Questico sends your team

Questico tells people when something needs them, by email from notices@questico.site, so nobody has to keep the tool open to find out.

Within a few minutes

- Owners and managers: "Quotation [no] for [client] was [status]."

Every morning at 8

- The person it belongs to: "N quotations due for follow-up"

Several things at once come as one email, never a flood. Each email says what happened and links to your tool. Anyone can stop them: the link at the foot of each email stops that business's notices for that person, and the same link turns them back on. Invitations and sign-in codes still arrive.

Changing your settings

In your console, press Edit website to open your tool’s admin panel. Change the name, logo, colours, words, pictures, lists and rules; every change shows in a live preview first. Records (the day-to-day entries) are made inside the tool itself.

Everyday features

- On a phone the menu moves to a bar at the bottom, and tables turn into cards.
- Anything printable opens your browser’s print window, where you can also choose “Save as PDF”.
- Lists and reports download as CSV files that open in Excel.
- WhatsApp messages open ready-written; you press send. Nothing is sent automatically.

3. Your first day

1. Before buying, try the demo with sample data and switch View as between owner, manager and designer to see each screen
2. Open the admin panel from Edit website in the Questico console; every change shows in a live preview
3. Enter the business name, short name, city, tagline, address and logo, and pick the colours and typeface
4. Enter your GSTIN if registered, and choose the GST mode and the default GST rate
5. Set the quote prefix, validity days, follow-up days, maximum designer discount and whether designers can edit each other's quotes
6. Set the payment stages so they add up to 100%
7. Fit the room, unit, category and property-type lists to your work
8. Write the proposal cover heading, introduction, terms and closing line, and upload a cover photo
9. Edit the WhatsApp templates and the decline reasons
10. Fill in the welcome lines, sign-in texts, pictures and contact details
11. Inside Anuman, add your rate library items (Rate library screen)
12. Inside Anuman, enter the bank details for proposals on the Team screen
13. Add your team: in the Questico console's Team section, type each person's email address and choose 'Can use it' (designer) or 'Can manage it' (manager); or add them on Anuman's Team screen, where the owner's save sends the invitation
14. Ask each person to sign in with that email address (with Google, or a code Questico emails them)

4. Everything it does

Today (everyone; designers see only their own quotes)

- Greet the user with today's follow-ups and the quotes expiring this week
- Open New quote, All quotes or the Rate library in one tap
- Show the value of sent quotes waiting on clients
- Show the value accepted this month, with a 6-month trend
- Show the acceptance rate over the last 90 days
- Show quotes sent this month and the number of drafts
- List quotes to follow up today: those whose follow-up date has arrived, plus sent quotes expiring within 5 days

- Open WhatsApp or log a follow-up from each row: note what the client said and set the next follow-up date
- Chart quoted and accepted value over the last 6 months
- List drafts and recently accepted quotes
- Let managers see everyone's quotes here

Quotes list (everyone)

- Show a badge with the number of follow-ups due
- Filter by status: Open (drafts and sent), Accepted, Declined, Expired or All
- Search by client, quote number or area
- Switch between My quotes and Everyone; managers can also pick a single designer
- Show client, version, value, status, sent date, valid-till date and designer for each quote
- Colour the valid-till date red when expired and amber when expiring soon
- Download the list as a spreadsheet
- Start a new quote

New quote (everyone)

- Enter client name, mobile, email, property type, area and site address
- Let managers choose which designer the quote belongs to
- Start with a set of rooms: Empty, Kitchen only, Wardrobes, Full 2 BHK or Full 3 BHK

Quote builder (everyone, within their editing rights)

- Save drafts automatically, showing 'Saving…' and 'All changes saved'
- Add rooms from quick-pick names or type a new room name; each room becomes a section of the proposal
- Rename a room, move it up or down, or remove it (with a confirmation if it has items)
- Add items from the rate library through a picker with search, category chips, a tick box and a quantity for each item
- Add a custom item as a blank line using the default GST rate
- Edit each line's name, description, quantity, unit, rate and GST (0, 5, 12, 18 or 28%), or remove the line
- Apply a discount as a percentage or in rupees
- Show the subtotal, CGST and SGST (or IGST) for each GST rate, round-off, total and total in words
- Show the payment schedule with the rupee amount of each stage
- Write a note on what changed in this version
- Open older versions from version chips; they are read-only
- Mark as sent with the sent date, valid-till date and follow-up date
- Mark as Accepted (date and note) or Declined (date, a reason from the list and a note)
- Revise as the next version, which copies the latest version into a new draft (up to 9 versions)
- Extend validity once a quote has expired
- Log a follow-up
- Edit client details; managers can also hand the quote to another designer
- Copy the quote as a new quote
- Call or WhatsApp the client, and open the proposal
- Let managers undo a decision or delete a quote
- Keep a history of up to 40 entries for each quote

WhatsApp share (everyone)

- Pick a message template; the tool suggests one based on words in the template name such as share, follow, valid or thank
- Fill in the client, quote and business details automatically, and let the user edit the message
- Offer to mark a draft as sent at the same time
- Record the share in the quote's history when Open WhatsApp is pressed

Proposal (everyone)

- Show a print preview with 'Print or save as PDF' and WhatsApp buttons
- Warn managers if bank details are missing

Clients (everyone)

- Build the client list automatically from quotes, grouped by mobile number and name
- Show each client's mobile, number of quotes, latest status, value quoted, value accepted and designer
- Search clients; designers can switch between My clients and Everyone's

Rate library (everyone views; owner and manager edit)

- Browse items by category chips with counts, or search
- Download the rate library as a spreadsheet
- Add, edit or delete an item: name, description, category, unit, rate, GST and whether it is offered in new quotes
- Show the library read-only to designers

Reports (owner and manager)

- Choose the period: Month, 3 months, financial year or All
- Show quotes sent, accepted value, acceptance rate, and days from sent to a yes (with average versions per quote)
- Chart quoted and accepted value
- Show where quotes stand in a donut chart
- Show which rooms clients buy, by accepted value after discount
- Show why quotes were declined
- Rank designers in a By designer table, with a spreadsheet download

Team (owner and manager)

- List each person with access (Owner, Manager, Designer, Invited, Not invited, Inactive), open quotes, value waiting and value accepted this month
- Add a designer or edit a person: full name, email address, title, access (Designer or Manager) and Active
- Enter the bank details printed on proposals: account name, bank and branch, account number, IFSC (checked) and UPI
- Show a 'Who can do what' summary

5. Reports, prints and downloads

Prints

- Client proposal, printed or saved as PDF: cover page with cover photo, logo, tagline, cover heading, client, site, quote number and version, date, 'Prepared by' and total
- Proposal letterhead with business name, address (or city), email, WhatsApp and GSTIN
- Introduction, then a table of client, mobile, site and valid-till date
- 'What changed in this version' for v2 onwards
- Scope of work room by room: item, description (optional), quantity, unit, rate (optional), amount and room subtotal
- Summary with tax rows, round-off, total and total in words
- Payment schedule with the amount of each stage, plus a 'Pay to' bank box
- Numbered terms with the validity date added automatically, a closing line, two signature lines and a footer

Downloads

- All quotes as a spreadsheet (19 columns)
- Rate library as a spreadsheet
- Quotes by designer as a spreadsheet

WhatsApp

- Opens WhatsApp with a message from the owner's templates already filled in; the user presses send
- Templates can use {name} {client} {no} {total} {valid} {property} {site} {area} {rooms} {version} {owner} {business}
- The proposal PDF is not attached automatically; it is saved from the print window and attached by hand

Worked out for you

- Line amount = quantity × rate
- Discount (% or ₹, never more than the subtotal) is spread across the GST rates in proportion
- GST is worked out for each rate and shown as CGST plus SGST, as IGST, or not at all
- Optional round-off to the nearest rupee, and the total in words in the Indian style (lakh and crore)
- Each payment stage = total × the stage's percentage
- Quote numbers run like PREFIX/26-27/0042 and restart each financial year
- A quote is shown as Expired once its valid-till date has passed
- A quote keeps its own copy of each rate, so changing the library never changes an old quote
- Acceptance rate, average days from sent to accepted, versions per quote, value by room, decline reasons and a designer leaderboard

6. What you can change in the admin panel

No coding: every change shows in a live preview, and saving updates your live tool.

Business & look

- Change the business name (required), short name (3 letters) and city
- Write the one-line tagline shown on the proposal cover
- Enter the studio address and upload the logo

- Choose the main colour from swatches; text on it is kept readable automatically
- Choose the sidebar style (Light, Deep or Tinted), one of 8 typefaces, and corners (Soft, Round or Sharp)

Quote rules

- Set the quote number prefix (required, up to 6 characters)
- Set how many days a quote stays valid (1 to 120)
- Set the follow-up reminder after N days (0 to 30)
- Set the most a designer can discount (%)
- Allow or stop designers editing a colleague's quotes
- Round the total to the nearest rupee or not

GST

- Enter your GSTIN (the format is checked)
- Choose the tax on quotes: CGST+SGST, IGST or No GST
- Choose the GST rate on a new custom item (0, 5, 12, 18 or 28%)

Payment schedule

- Set up to 8 payment stages, each with a label, % of the total and when it is due
- The panel checks that the stages add up to 100%

Rooms & units

- Edit the room quick picks, units, rate library categories and property types

Proposal

- Write the cover heading, introduction, closing line and terms (one per line)
- Upload the cover photo
- Show or hide rates on the proposal
- Show or hide item descriptions on the proposal

WhatsApp & reasons

- Write up to 12 WhatsApp message templates, each with a name and text
- Edit the list of reasons a quote is declined

Words & pictures

- Write the welcome line for managers and the welcome line for designers
- Write the sign-in heading, text and quote line
- Change the banner, sign-in photo and empty-list picture; pictures are shrunk automatically on upload

Contact

- Enter the contact email and WhatsApp number

7. Good to know

- Clients cannot view or accept a quote online; acceptance is recorded by the team
- WhatsApp opens with the message ready; nothing is sent automatically, and the PDF has to be attached by hand

- It does not make invoices, collect payments or track the booking advance (the advance can only be mentioned in a note)
- The room sets offered on New quote (Kitchen only, Wardrobes, Full 2 BHK and so on) are fixed and cannot be changed in the admin panel
- The quote builder offers only the GST rates 0, 5, 12, 18 and 28%
- A quote can have at most 9 versions
- Quotes older than 15 months are not loaded
- Line items cannot carry photos or attachments
- There is no separate client record to edit; the client list is built from quotes
- A person who signs in without being invited sees 'You're signed in, but not invited yet'

Need help?

Write to contact@questico.site with your tool’s address and what you need.