questico.site

Field Sales Visits & Orders

User manual

Inside your tool it is called “Beatbook”.

A field sales tracker for distributors: reps follow the day's beat on their phones, check in at each shop, book orders from your price list and record collections.

1. Your tool at a glance

Beatbook runs a distributor's field sales team on fixed day-wise routes (beats). On the phone, reps check in at each shop with its location, book orders from the price list, record why a shop did not order, and note cash or other collections. The owner sees who is on the road, what was booked, beat coverage against plan and monthly targets, and prints the next day's van loading sheet.

Made for: Distributors selling to kirana and retail shops, for example dairy, bakery or FMCG, with an owner, a sales manager and a team of field reps. The sample business is a dairy and bakery distributor in Ludhiana.

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 distributor or proprietor	• Do everything a manager can • Give a person access from Beatbook's Team screen: saving them sends the invitation to their email address • Remove a person's access by unticking Active	• —
Manager	A sales manager or supervisor	• See everyone's visits and orders • Create, edit and delete beats, and set the route order • Mark rep-added shops as checked, close or delete shops, and reset a shop's pinned location • Set monthly targets • See orders for dispatch and print the loading sheet • Open the Team and Reports screens and download shop lists	• Give new people access (they see 'Only the owner can give new people access') • Change products or rates inside the tool; these are changed in the admin panel
Sales rep	Field sales reps who visit shops	• Follow their own beats and route • Check in, book orders, record collections and add remarks at each shop • Add new shops (if the owner allows) and edit shop details • See their own visits, orders and target, and their My month screen	• Record visits for any day other than today • See other reps' visits or orders • Change their own target • Open the Team or Reports screens, or download the shop list • Delete shops or beats

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.

Sales team

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

Beats

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

Shops

- 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 added the shop.
- Staff can change or delete an entry only while the shop is not yet verified.
- Once saved, staff can never change the verified mark, whether the shop is active and the person who added it.
- On entries that aren't theirs, staff may change only the map location and the last visit.
- Staff can never mark a shop verified; a manager does that.

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.

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 Sales rep 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.

Every morning at 8

- The rep the beat belongs to: "N beats to cover today"
- Owners and managers: "N new shops waiting for verification"

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 rep 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, locality, cash hand-over point and logo, and pick the colours
4. Enter the product groups and the full price list with code, pack and rate
5. Set the visit rules: location check, distance flag, minimum order, delivery days and cutoff, order prefix, what reps can do, and when a shop is due for a visit
6. Define the shop classes, areas and shop types
7. Set the no-order reasons and payment modes
8. Write the WhatsApp order and receipt messages and the loading sheet footer
9. Fill in the welcome texts, visit rules, sign-in texts, pictures and contact
10. Add your team: in the Questico console's Team section, type each person's email address and choose 'Can use it' (rep) or 'Can manage it' (manager); or add them on Beatbook's Team screen, where the owner's save sends the invitation
11. Ask each person to sign in with that email address (with Google, or a code Questico emails them)
12. Inside Beatbook, create beats with their rep and visit days
13. Add shops to each beat and set the route order
14. Set each rep's monthly target on the Team screen

4. Everything it does

Today (sales rep)

- Show today's beats, a progress ring of shops done out of planned, and the value booked today
- Jump to the next shop on the route, or visit another shop off the route by searching for it
- Show figures for Shops visited, Booked today, Productive calls % and Collected today, with where to hand over the cash
- List today's route in order, with each shop's class and status (To visit, Checked in, ₹ value, No order) and a Start or Continue button
- List off-route visits separately
- Add a new shop, if the owner allows reps to
- Show progress against the monthly target (if shown to reps), visits, orders and collections, with a link to My month
- Show the price list and the visit rules

Shop visit (sales rep)

- Call or WhatsApp the shop, open it in Google Maps (pinned location or address), or open its details
- Check in, recording the time and, if the owner turns it on, the phone's location
- Pin the shop's location at its first check-in; later check-ins show the distance from the pin and a 'Far from shop' flag beyond the set distance
- See the last visit and repeat that order in one tap

- Book an order from the price list, grouped by product group, with a filter (All, each group, In order), − and + buttons, a quantity box for each pack, line amounts and a running total
- Warn when the order is below the minimum order value
- Choose a no-order reason; one is required if nothing is ordered
- Record a collection with amount and mode, if the owner turns collections on
- Add remarks, then Finish visit or Update visit
- After finishing, see the order number and delivery date, and a warning if below the minimum
- Send the order and the payment receipt to the shop on WhatsApp, and print an order copy

Today (owner and manager)

- Show a headline with reps on the road, planned shops visited and value booked so far
- Show figures with 14-day trends: shops visited against plan, booked today, productive calls, and collected today by mode
- Show each rep on the road today with a progress bar, orders and last stop
- Open a rep's day: each stop's time in and out, result, collection, check-in distance (far ones flagged) and shops still to visit
- Chart booked value over the last 14 days
- List what needs a look: far check-ins, key (class A) shops not visited for the set number of days, new shops waiting to be checked, and orders below the minimum
- Show a monthly leaderboard of booked value against target and productive %

Shops (everyone; some actions owner and manager only)

- Switch between My beats (reps), All shops, Due for a visit, New and Closed (managers)
- Filter by beat and class, and search
- Show each shop's class, area and beat stop, last visit (red if overdue) and a Visit button
- Show managers a badge counting new shops not yet checked
- Download shops as a spreadsheet (owner and manager)
- Open a shop to see booked this month, visits this month, average order over 2 months, last visit, 2 months of visit history (reps see only their own) and what the shop buys by value
- Add or edit a shop: name, owner or contact, mobile, type, area, address or landmark, beat and class
- Refuse a shop with the same name in the same area as a duplicate
- Mark shops added by reps as New until a manager marks them checked
- Let managers mark a shop closed, keep or reset the pinned location, or delete it

Beats (everyone views their own; owner and manager edit)

- Show a week plan of rep against weekday, with today highlighted
- Show beat cards with days, class mix, shops covered this month, a note and the first 6 stops
- Create a beat: name, rep, main area, note for the rep and visit days
- Edit or delete a beat (its shops come off every route)
- Set the route order by moving shops up or down
- Show reps only their own beats

Orders (owner and manager: Orders for dispatch; rep: My orders)

- Choose the delivery date with arrows
- View orders by shop, or by product with packs per beat
- Filter by beat
- Show the number of orders, value, packs to load and beats

- Download orders as a spreadsheet (one row per line) and print the loading sheet
- Open any order copy from the list

Price list (everyone)

- Show the products and rates, grouped, read-only
- Tell managers that products and rates are changed in the admin panel

My month (sales rep)

- Move between months
- Show booked value (against target if shown), shop visits and days on the road, productive calls and collected
- Show a target bar, a booked-each-day chart and a table of days that opens each day's visits

Team (owner and manager)

- Show booked against target for each person, month by month
- List each person's access (Owner, Manager, Rep, Invited, Inactive), beats, visits and productive %, booked, target, and collected
- Set or change each rep's monthly target
- Add or edit a person: full name, email address, mobile, base area, access (Rep or Manager) and Active

Reports (owner and manager)

- Move between months and download the visit register (17 columns)
- Show booked value (orders, average), shop visits (% of planned), productive calls and collected
- Chart booked each day and value by product group
- Show beat coverage: shops covered, planned visits done %, strike rate and booked
- List top products, why shops did not order, and shops due for a visit

5. Reports, prints and downloads

Prints

- Order copy, printed or saved as PDF: letterhead, shop, booked by, lines, total, amount in words, 'This is an order confirmation, not a tax invoice', and signature lines for the shop and the distributor
- Loading sheet: load by product (packs, value and a 'Loaded' tick column), drop list by beat, total in words, a footer note, and signatures for Prepared by, Loaded by and Driver

Downloads

- Shops
- Orders for a delivery date, one row per order line
- Visit register for a month (17 columns)

WhatsApp

- Order confirmation to the shop, ready to send, with {owner} {shop} {business} {items} {amount} {delivery} {no} {date}
- Payment receipt to the shop, ready to send, with {amount} {mode} {shop} {date} {business}
- Call and WhatsApp links on every shop

- WhatsApp opens with the message ready; the rep presses send

Worked out for you

- Line value = quantity × rate per pack, and the order total; no GST is applied
- Distance of the check-in from the shop's pinned location
- Delivery date = order date + the set delivery days, plus one more day if booked after the order cutoff time
- Order numbers run like PREFIX-YYMMDD followed by the rep's initials and a running number
- Productive calls % and strike rate
- Planned stops = beat days so far × shops on the beat, and coverage against that
- Shops flagged as due for a visit after the set number of days
- Money in Indian grouping (₹12,34,567) and amounts in words in lakh and crore

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 name, short name and city
- Enter the locality or address on printed sheets
- Name where reps hand over cash (for example 'Dispatch desk')
- Upload the logo
- Choose the main colour, sidebar style (Light, Deep or Tinted), one of 8 typefaces, and corners (Soft, Round or Sharp)

Price list

- Edit the product groups, in display order
- Enter 1 to 80 products, each with a name, short code, group, the pack reps order in, rate to shops per pack (₹), and whether reps can book it

Visit rules

- Ask for the phone's location at check-in or not
- Flag check-ins farther than a set distance (50 to 5,000 metres)
- Set the smallest order worth a delivery (₹)
- Deliver a set number of days after the order (0 to 7), with an order cutoff time
- Set the order number prefix
- Allow reps to record payments
- Allow reps to add new shops
- Show reps their monthly target
- Set after how many days a shop is due for a visit (2 to 60)

Shops & areas

- Set 1 to 6 shop classes, each with a letter, name, colour and meaning
- Edit the areas and types of shop

Reasons & payments

- Edit the no-order reasons and payment modes

WhatsApp & printouts

- Write the order confirmation message and the payment receipt message
- Write the loading sheet footer note

Words & pictures

- Write the manager welcome, rep welcome and visit rules shown to reps
- Write the sign-in heading, text and quote
- Change the three pictures; they are shrunk automatically on upload

Contact

- Enter the contact email and WhatsApp

Checks the panel makes

- Product codes must be unique
- Each product's group must be in the groups list
- At least one product must be bookable
- Shop class letters must be unique

7. Good to know

- There is no GST, invoice or tax document; the order copy says it is not a tax invoice
- It does not keep stock or inventory
- Products and prices are changed only in the admin panel, and that information is public; there are no shop-wise prices, schemes or discounts
- There is no live GPS tracking; location is taken only at check-in
- Collections are not matched against what a shop owes
- There is no route optimisation; the route order is set by hand
- Reps can record visits only for today
- WhatsApp opens with the message ready; nothing is sent automatically
- 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.