questico.site

Sales Pipeline & Follow-ups

User manual

Inside your tool it is called “Sauda”.

A simple sales pipeline for small sales teams that puts every enquiry on one board, lists today's follow-ups and sends WhatsApp messages from the owner's own templates.

1. Your tool at a glance

Sauda keeps every enquiry as a deal with its value, size, source and salesperson, and moves it through stages from first call to won or lost. Salespeople see their follow-ups for the day and log every call and visit; the owner sees the pipeline, the likely value and which sources and salespeople bring in the business.

Made for: Small sales teams handling enquiries. The defaults are set up for a rooftop solar installer (the sample is in Ahmedabad with 5 salespeople), with kW size, electricity bill, the PM Surya Ghar subsidy and a site survey sheet.

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 proprietor or sales head	• Do everything a manager can • Invite people and remove their access; the owner is the only one who can • Give access from inside the tool: saving an active salesperson as Sales or Manager under Team sends the invitation to their email address • Change a person's access level, which re-invites them, or remove access by making them inactive or pressing Remove access	• —
Manager	A sales manager or team lead	• See all deals and follow-ups • Reassign deal owners and delete deals • Open Reports and Team, and see the target card • Add salesperson records • Do everything a salesperson can	• Give new people access (they see 'Only the owner can give new people access')
Salesperson	Each member of the sales team	• See every deal, opening on their own deals first if the owner sets that • Add enquiries (owned by themselves) • Log calls, visits and WhatsApps on any deal • Move, edit and mark won or lost their own deals, or colleagues' deals too if the owner allows • See their own follow-ups and Today screen • See the leaderboard, if the owner allows	• Reassign deal owners • Delete deals • See Reports or Team

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.

Deals

- 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 are its salesperson.
- Once saved, staff can never change the salesperson and the deal number.
- On entries that aren't theirs, staff may change only the next follow-up date and the follow-up note.
- Staff may add to the activity log, never rewrite or remove what is there.
- Turning on “Staff can change deals owned by a colleague” in the admin panel gives staff more room here.

Sales team

- 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.

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 Salesperson 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

- The person it belongs to: "Deal [no] is now yours: [name]."

Every morning at 8

- The person it belongs to: "N follow-ups due today or overdue"

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. Try the demo first, switching View as between owner, manager and salesperson

2. Open the admin panel from Edit website in the Questico console
3. Set the business name, tagline and logo
4. Set the pipeline stages with their chances, and the follow-up and going-cold days
5. Set the size label, unit and deal number prefix
6. Add customer types with their rate per unit (and subsidy eligibility)
7. List enquiry sources and areas served
8. Write the WhatsApp templates and set call outcomes and lost reasons
9. Set the monthly target and leaderboard visibility; check the subsidy figures or switch the subsidy off
10. Set the team rules
11. Write the survey sheet note and terms
12. Inside Sauda (as owner), open Team and Add salesperson with each email address and access level (Sales or Manager); saving sends the invitation. People can also be added from the console's Team section with 'Can use it' (salesperson) or 'Can manage it' (manager)
13. Ask each person to sign in with that email address (with Google, or a code Questico emails them)
14. Enter current enquiries with New enquiry

4. Everything it does

Today

- Show managers the open deals, their value, and follow-ups due today and overdue
- Show salespeople only their own follow-ups and deals
- Start a new enquiry, or open Follow-ups or the Pipeline
- Show open pipeline value (deals and total size) and the value likely to close (value × stage chance)
- Show won this month with a 6-month trend, and % of target for managers
- Show follow-ups due and how many are overdue
- List follow-ups due with date, stage and owner, and quick Call, WhatsApp and Log buttons
- Chart won value for 6 months and show the latest activity
- Show this month's target progress (managers, when a target is set)
- Chart the pipeline by stage; tap a stage to see those deals
- Show a salesperson leaderboard (always for managers; for staff if the owner allows)
- List deals going cold (no activity for the set number of days)

Pipeline

- Show a board with one column per open stage, with count, value and chance of winning
- Show Won and Lost drop areas with the last 30 days
- Drag a deal to move it (only deals you can edit); dropping on Won or Lost opens the form to mark it
- On a phone, show one stage at a time with an arrow to move a deal
- Filter by whose deals (mine, everyone, or one person for managers), source, and search
- Start a new enquiry

Deals

- List deals with number, contact, area, size, value, stage, owner, follow-up or won/lost date, and source
- Filter by stage (all open, everything, or one stage), whose deals and source
- Sort by follow-up date, newest, value or furthest stage
- Show totals and the likely value; up to 300 rows

- Download the deal list (19 columns)
- Start a new enquiry

Follow-ups

- Switch between mine and everyone's
- Group follow-ups into Overdue, Today, Next 7 days, Later and No follow-up set, with count and value
- Call, WhatsApp or log an activity from each row
- Show a badge with follow-ups due today or overdue (own for staff, all for managers)

Deal page

- Move the deal by tapping a stage on the stage bar
- Show the lost reason with a Reopen option; or the won date and days from enquiry to order; or a going-cold warning
- Call, WhatsApp, log an activity, edit, print the site survey sheet, mark won or lost, or delete (managers)
- Show a timeline of calls, visits, WhatsApps, emails, notes and stage changes, with outcome, date, time and who
- Show the next follow-up and mark it done by logging it
- Show size, monthly bill, home subsidy estimate, what the customer pays after subsidy, price per unit, stage chance and weighted value
- Show contact, mobile, email, site, area, customer type, source, owner, enquiry date and how long it has been in the stage

New enquiry and edit

- Enter contact name, mobile (required), site or business name, email, area, type of customer, size and monthly electricity bill (if the owner asks for it)
- Suggest the value as size × the customer type's rate, rounded to ₹500, which can be changed
- Choose the source, the starting stage (new deals only) and the owner (managers only)
- Set the next follow-up (defaults to the owner's number of days), what to do next and notes from the first call
- Show a live subsidy estimate
- Number deals automatically, for example VS-0101

Log activity, WhatsApp, won and lost

- Log a call, site visit, WhatsApp, email or note, with an outcome from the owner's list
- Set the next follow-up with quick choices: today, tomorrow, in 3 days, next week or none
- Write what happened and what to do next, and change the stage (if allowed)
- Pick a WhatsApp template (guessed from the stage), see it filled in, edit it, open WhatsApp; the message is logged on the deal
- Mark won with final value, size, won date (not in the future) and note
- Mark lost with a reason from the list (required) and a note; a lost deal can be reopened by moving its stage
- Delete a deal (managers only)

Reports (owner and manager)

- Choose the period: month, 3 months, financial year or all
- Show new enquiries, won value (orders and size), win rate (won ÷ closed), average order and average days from enquiry to order

- Chart won value by month (up to 12 months)
- Show a funnel of the period's enquiries by the furthest stage reached, with % from the previous stage
- Show each source's enquiries, won deals, conversion % and won value, with a chart
- Show a salesperson table: enquiries, won, value, size, win rate, open pipeline and overdue follow-ups; download it
- Chart why deals were lost

Team (owner and manager)

- List salespeople with access status (Owner, Manager, Sales, Invited, Not invited, Inactive), open deals, pipeline, won this month and due today
- Chart open pipeline by person
- Explain who sees what
- Preview your details as they print on sheets
- Add or edit a salesperson: full name, email address (fixed once saved), title, access (Sales or Manager) and active
- Give, change or remove access (owner only)

5. Reports, prints and downloads

Prints

- Site survey sheet: letterhead with logo, tagline, city, email and WhatsApp; deal number and print date; customer, mobile, site, area, type, source, sales contact and survey date; requirement (size, bill, estimated value, subsidy or stage); blank 'On the roof' fields (roof type, shade-free area, roof height, sanctioned load or meter phase, inverter or battery location, earthing pit, cable route, notes); note and terms; signature lines

Downloads

- Deal list (19 columns)
- Sales by person for the chosen period

WhatsApp

- Owner's own message templates, which can fill in name, full name, owner, business, size, unit, value, date, area and site; each send is logged on the deal
- Phone calls open from the Call button

Worked out for you

- Suggests a deal value = size × the customer type's rate, rounded to ₹500
- Works out the weighted pipeline = value × stage chance of winning
- Estimates the home subsidy (when switched on and the customer type is eligible) = first-2-unit rate × size up to 2 + third-unit rate × the part of size between 2 and 3, capped at the maximum per home
- Works out win rate, average days from enquiry to order, funnel conversion and source conversion
- Flags deals going cold after the set number of days without activity

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, short name and city
- Write a one-line tagline about what you sell (printed on the survey sheet)
- Upload the logo
- Choose the main colour, sidebar style, typeface and corner style

Pipeline stages

- Set up 3 to 9 stages, each with a name, code, meaning (still being worked, closed won or closed lost), chance of winning % and colour
- Start from the defaults: New enquiry 10%, Site survey 25%, Quote sent 45%, Negotiation 70%, Won, Lost
- Set the first follow-up after a number of days, and when a deal counts as going cold
- Write the line under the Pipeline heading

Enquiries

- Name the size of a job (for example System size) and its unit (for example kW)
- Set the deal number prefix
- Ask or skip the monthly electricity bill
- List customer types, each with an all-in rate per unit and whether it is eligible for the home solar subsidy
- List enquiry sources and areas served

Calls & WhatsApp

- Write up to 12 WhatsApp message templates, each with a name and text
- Edit the list of call outcomes
- Edit the list of lost reasons

Targets & subsidy

- Set the monthly sales target (0 hides it)
- Show or hide the leaderboard to staff
- Show or hide the subsidy estimate
- Set the subsidy per kW for the first 2 kW, per kW for the 3rd kW, and the maximum per home

Team rules

- Open staff on their own deals first
- Let staff change deals owned by a colleague

Words & pictures

- Write the manager line and salesperson line
- Write the survey sheet note and terms
- Write the sign-in heading, text and quote
- Change the three pictures

Contact

- Enter the email and WhatsApp number printed on the survey sheet

Checks the panel makes

- Require at least one open stage, one won stage and one lost stage
- Refuse two stages with the same code
- Keep the subsidy maximum at or above the subsidy for a single kW

7. Good to know

- Some solar wording is fixed whatever the settings: the 'Monthly electricity bill' label, the survey sheet title and its 'On the roof' checklist, and the subsidy's 'first 2 kW / 3rd kW' structure
- Call buttons always dial with +91
- It does not make quotations or invoices; the survey sheet states it is not an order or an invoice
- It does not send email; email is only logged as an activity
- WhatsApp messages open in WhatsApp to be sent by hand; there is no automatic WhatsApp or SMS and no WhatsApp Business API
- It does not capture leads from website forms or ads, and has no import
- It sends no reminders or notifications outside the app
- Each deal keeps its latest 60 activities, and the last 15 months of deals are loaded
- There are no products or line items per deal

Need help?

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