

NestLeads

Every lead. Every follow-up. One place.

Web Application User Manual

A step-by-step guide for owners, admins and sales teams: from first setup to closing the deal.

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Applies to the NestLeads web application

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GETTING STARTED

Welcome to NestLeads

01

NestLeads is your sales workspace: every enquiry from IndiaMART, Justdial, TradeIndia, Facebook and your website lands in one place, gets an owner, a status and a follow-up date, and ends as a quotation, an order or a client. This manual shows, step by step, how to do each job in the web application.

Who this manual is for

The menu you see depends on your role. Find your role, then read the chapters marked for you.

Role	Typical user	What you can do
Super Admin	Business owner	Everything, including billing, the Console and role permissions.
Admin	Sales head / office admin	Team, integrations, settings, reports, insights, WhatsApp setup, billing and trash.
Sales Executive	Salesperson	Work leads, follow-ups and visits; clients; quotations, orders and invoices; WhatsApp inbox; social and campaigns.
Service Manager	Service / operations lead	Clients, products, services, price books and purchase orders.
Accountant	Accounts	Clients, quotations, sales orders and invoices.

> **NOTE**
> Menu access can be changed per role in **Settings › Permissions**, so your company may show slightly more or fewer pages than listed here.

How to read this manual

You will see	It means
Settings › Roles	A menu path: open **Settings** in the left sidebar, then the **Roles** tab.
Super Admin Admin	Which roles can open that page.
Tip	A shortcut or good habit.
Important	Something that affects data, billing or customers. Read before you click.

A map of the left sidebar

OVERVIEW & SALES

- Dashboard
- Leads
- Live Performance
- Visit Calendar
- Follow-ups

BUSINESS & INVENTORY

- Clients
- Products
- Services
- Price Books
- Quotations
- Sales / Purchase Orders
- Invoices

ANALYTICS

- Reports
- Insights

SOCIAL & CAMPAIGNS

- Social Media planner
- Autopilot
- Facebook, LinkedIn, Google Ads

MESSAGING

- WhatsApp Inbox
- Campaigns, Logs
- Document Vault
- Auto Funnels, Setup

WORKSPACE & SYSTEM

- Team, Integrations, API Keys
- Security, Support
- AI Usage, Billing
- Trash, Activity Log, Settings

GETTING STARTED

Getting Started

02

Create your company account, sign in safely, and learn the screen layout.

Create your company account

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Register page	New companies	Creates your workspace and a Super Admin login

1. Open the NestLeads website and choose **Create an account** on the login page.
2. Enter your **company name**, your **name**, **email** and a strong **password**. The checklist under the password shows what is still missing.
3. Submit. You are guided to choose a plan (**Onboarding**). A workspace opens once a plan is active.
4. Open **Settings › General Info** and fill company name, GST, address and logo before sending any quotation.

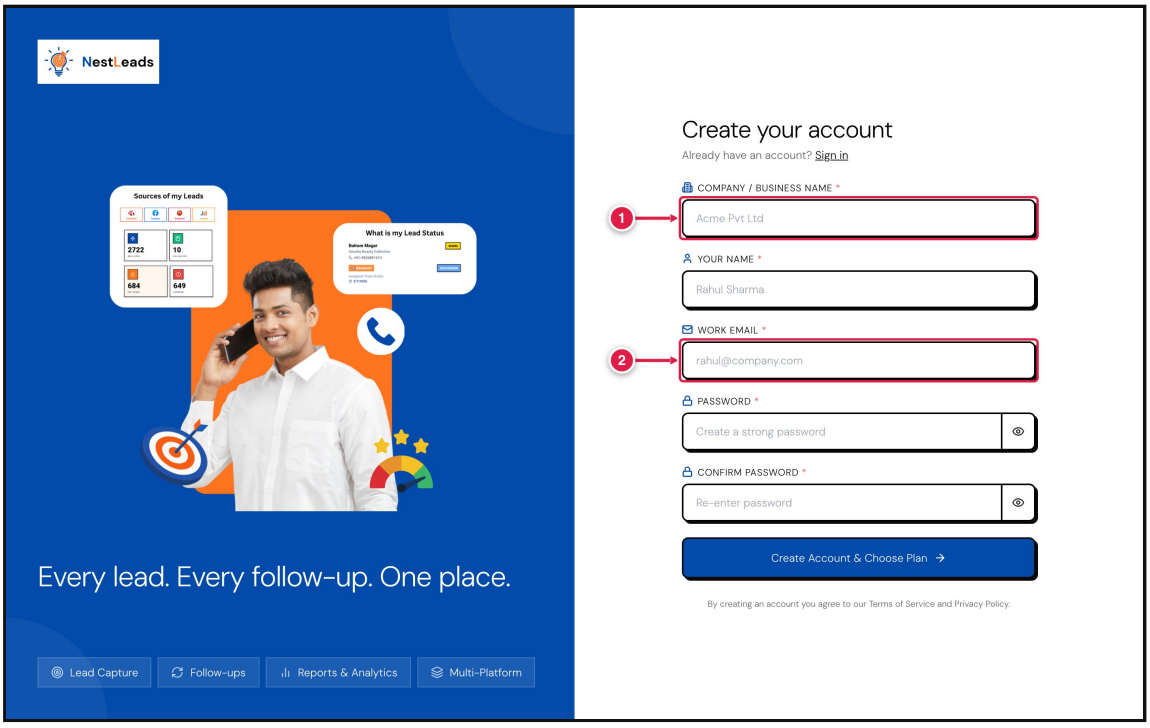


Figure 1. The registration page.

1. **Company and personal details**.
2. **Email**: used to sign in.

Sign in

1. Open the login page and enter your **Email** and **Password**. Use the eye icon to show what you typed.
2. If two-step sign-in is on, enter the code from your authenticator app, WhatsApp or email.
3. You land on the **Dashboard**.

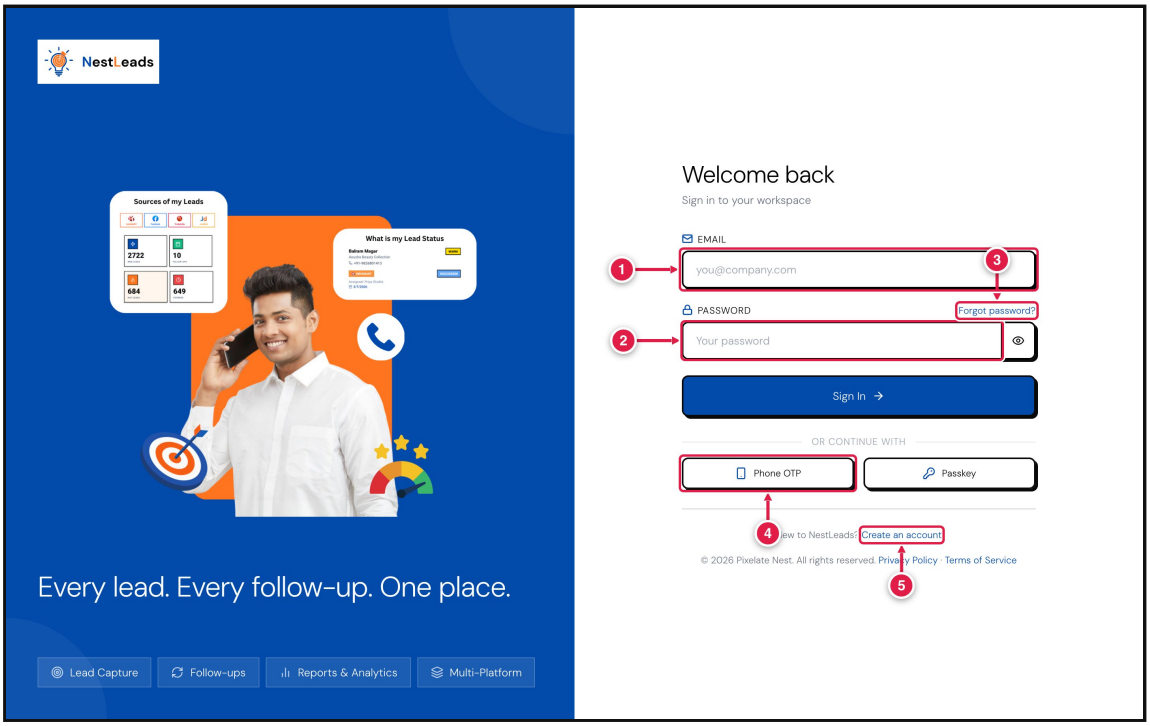


Figure 2. The login page.

1. **Email**.
2. **Password**.
3. **Forgot password?** sends a reset link to your email.
4. **Phone OTP** and **Passkey**: quicker ways to sign in once set up.
5. **Create an account** for new companies.

Forgot your password?

1. Click **Forgot password?** and enter your email.
2. Open the email and click the reset link.
3. Choose a new password and sign in.

Make your account safer

Security

Every user can open **Security** from the sidebar. Turn on at least one extra lock:

- **Passkey**: sign in with your fingerprint, Face ID or screen lock.
- **Authenticator app**: a 6-digit code from Google Authenticator or similar.
- **Email / WhatsApp verification**: confirm your contact so codes and resets reach you.
- **Backup codes**: one-time codes in case you lose your phone. Store them safely.

- **Signed-in devices**: see where you are logged in and sign out other devices.

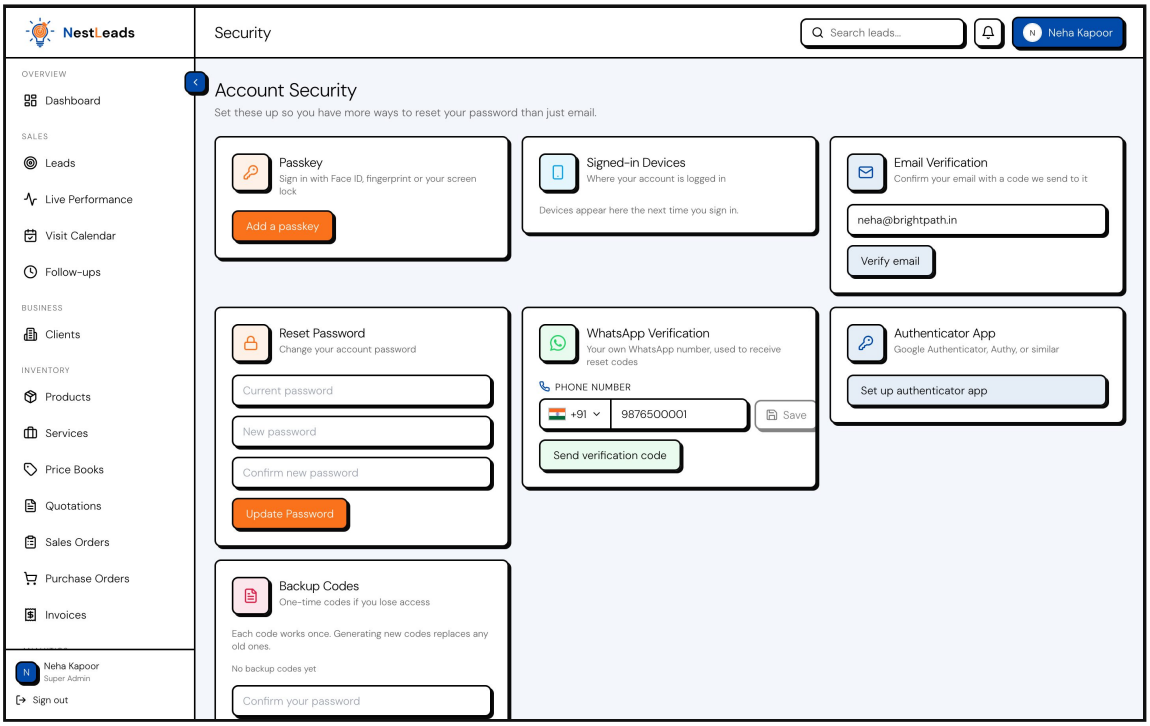


Figure 3. The Security page.

Find your way around

The **sidebar** on the left lists your pages. The top bar has a **lead search**, the **bell** for notifications and your profile. Most pages follow the same pattern: summary cards at the top, filters and search under them, a table or board in the middle, and an action button (Add, New, Import) at the right.

SALES

The Dashboard

03

The Dashboard answers one question every morning: what needs my attention right now?

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Dashboard	All roles	Today's numbers, targets, team activity and pipeline at a glance

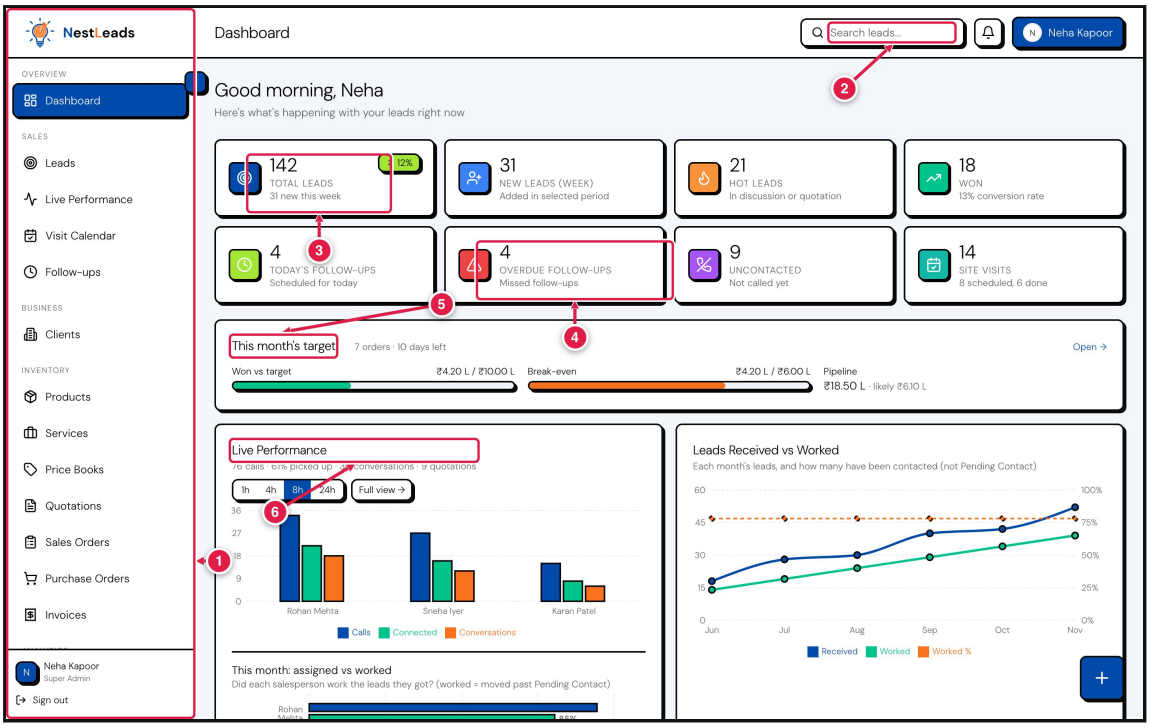


Figure 4. The Dashboard.

1. **Sidebar**: every page you can open.
2. **Search**: find a lead by name, company or phone from anywhere.
3. **Total leads** with growth against last month.
4. **Overdue follow-ups**: promises you have missed. Clear these first.
5. **This month's target**: won value against your target and break-even.
6. **Live Performance**: calls and conversations per salesperson (admins).

What the cards mean

Card	Meaning
Total leads	All leads in your workspace, with the month-on-month change.
New leads	Leads added today, this week or this month (choose the period).

Card	Meaning
Hot leads	Leads in discussion or quotation stage.
Won	Leads converted to clients, with the conversion rate.
Today's follow-ups	Leads whose follow-up date is today.
Overdue follow-ups	Follow-up dates already passed.
Uncontacted	Leads still in **Pending Contact**: nobody has called yet.
Site visits	Visits scheduled and done.

Below the cards you will find charts for leads received vs worked, leads per source per day, the sales funnel, top performers by month, and lists of recent leads and quotations.

> **TIP**
> Admins also see **assigned vs worked** for each salesperson this month. A big gap means leads are being ignored.

SALES

Leads

04

A lead is one enquiry from one person or company. Everything in NestLeads starts here.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Leads	Super Admin, Admin, Sales Executive	Capture, work, follow up and convert enquiries

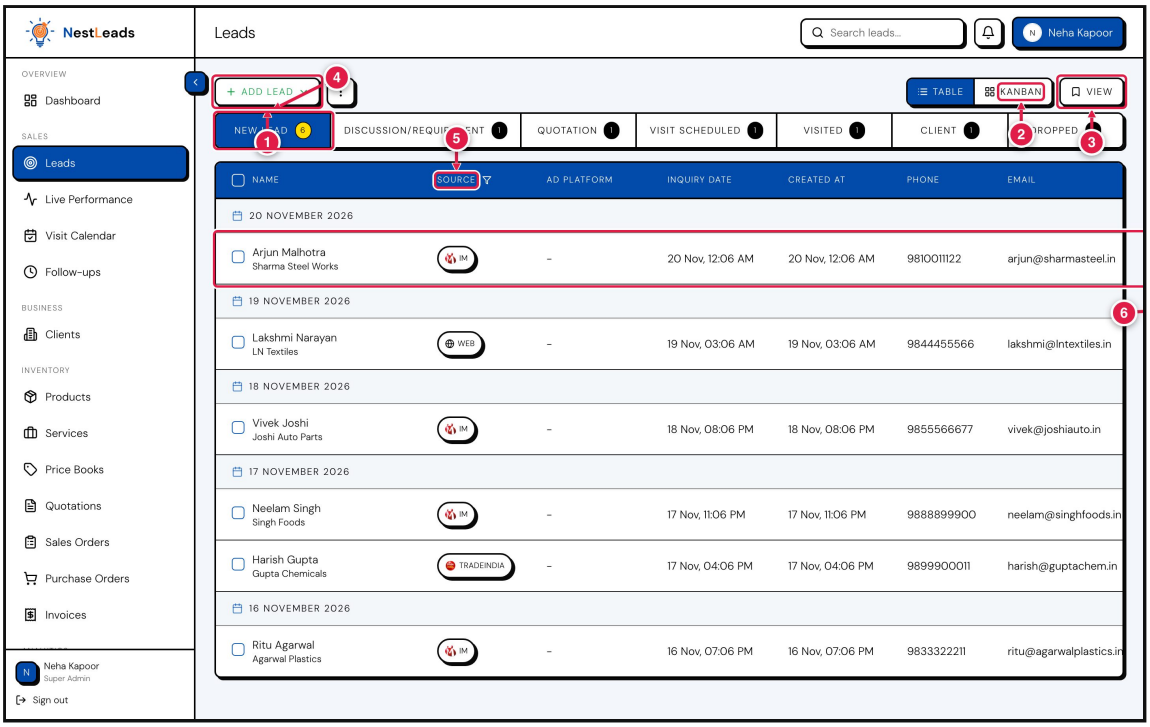


Figure 5. The Leads page (table view).

1. **Add Lead**: create one manually, or import a file.
2. **Kanban**: switch from the table to a board.
3. **View**: saved views and visible columns.
4. **Stage tabs**: New Lead, Discussion, Quotation, Visit Scheduled, Visited, Client, Dropped.
5. **Source**: filter by where the lead came from.
6. **A lead row**: click it to open the detail panel.

Where leads come from

- **Automatically** from IndiaMART, Justdial, TradeIndia, Facebook and Google Ads lead forms once connected in **Integrations** (Chapter 15).
- **Your website** forms, using an API key.
- **Manually** with **Add Lead**.
- **Imported** from Excel or CSV with **Add Lead › Import Excel / CSV**.

Add a lead manually

1. Click **Add Lead** and choose to add one lead.
2. Fill **name**, **company**, **phone**, **email**, **requirement** and **budget**. Phone is the most important field: it is how duplicates are found.
3. Choose the **source** and, if you wish, the salesperson it is **assigned to**.
4. Save. The lead appears under **New Lead**.

Import many leads

1. Click **Add Lead › Import Excel / CSV**.
2. Choose your file. Match each column of your file to a NestLeads field.
3. Confirm. Rows that already exist are skipped so you do not get duplicates.

Open a lead

Click a lead to open its panel. It shows contact details, budget and requirement, quick action buttons (WhatsApp, call, email) and the full status history.

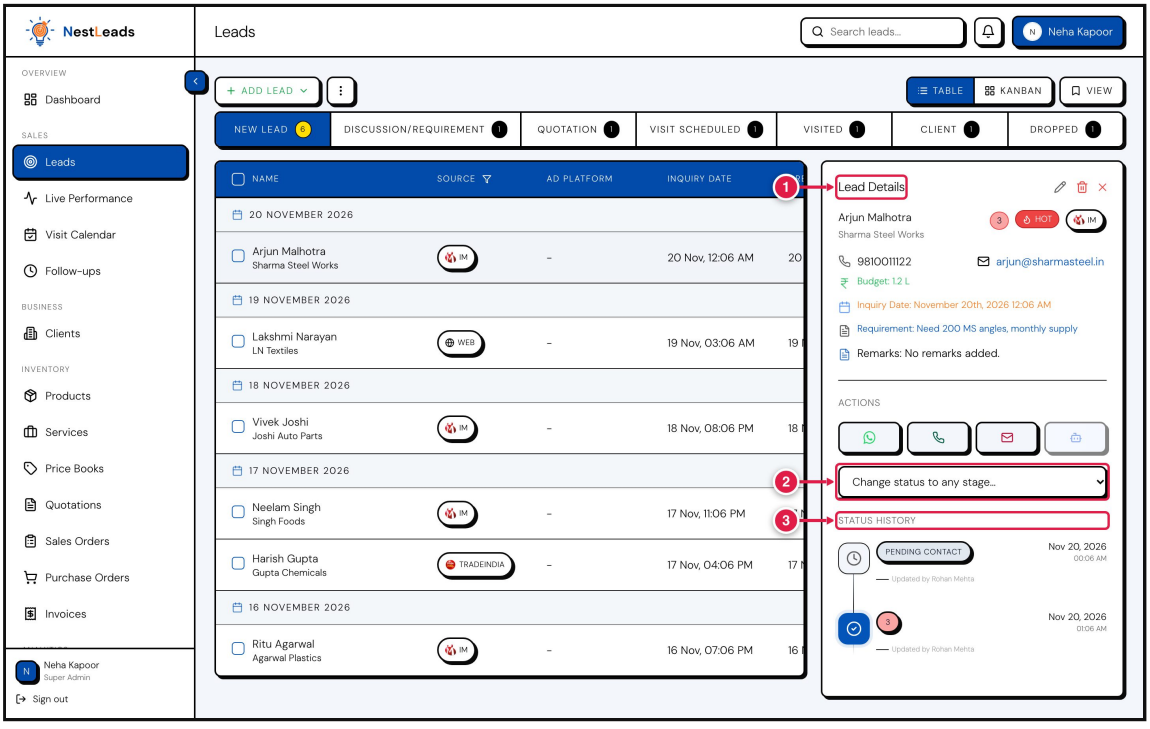


Figure 6. A lead's detail panel.

1. **Lead details**: contact, budget, requirement and tag (Hot / Warm / Cold).
2. **Change status**: move the lead to any stage.
3. **Status history**: who changed what and when.

Move a lead through stages

1 Pending Contact › 2 Contacted 1-3 › 3 Discussion › 4 Quotation › 5 Visit › 6 Won (Client)

1. Open the lead and choose a new stage in **Change status to any stage**.
2. Add a **remark** (what the customer said) and, if needed, a **follow-up date** or **visit date**.
3. Mark the temperature: **Hot**, **Warm** or **Cold**.
4. Save. The change is recorded in the history.

IMPORTANT

Dropped leads move out of your active list. Add a reason (for example price too high, or the competitor's name) so **Insights** can show why you lose deals.

NOTE

Your company can rename stages or add its own in **Settings › Lead Statuses**.

Board view (Kanban)

Choose **Kanban** to see each stage as a column with lead cards. Drag a card to another column to change its stage.

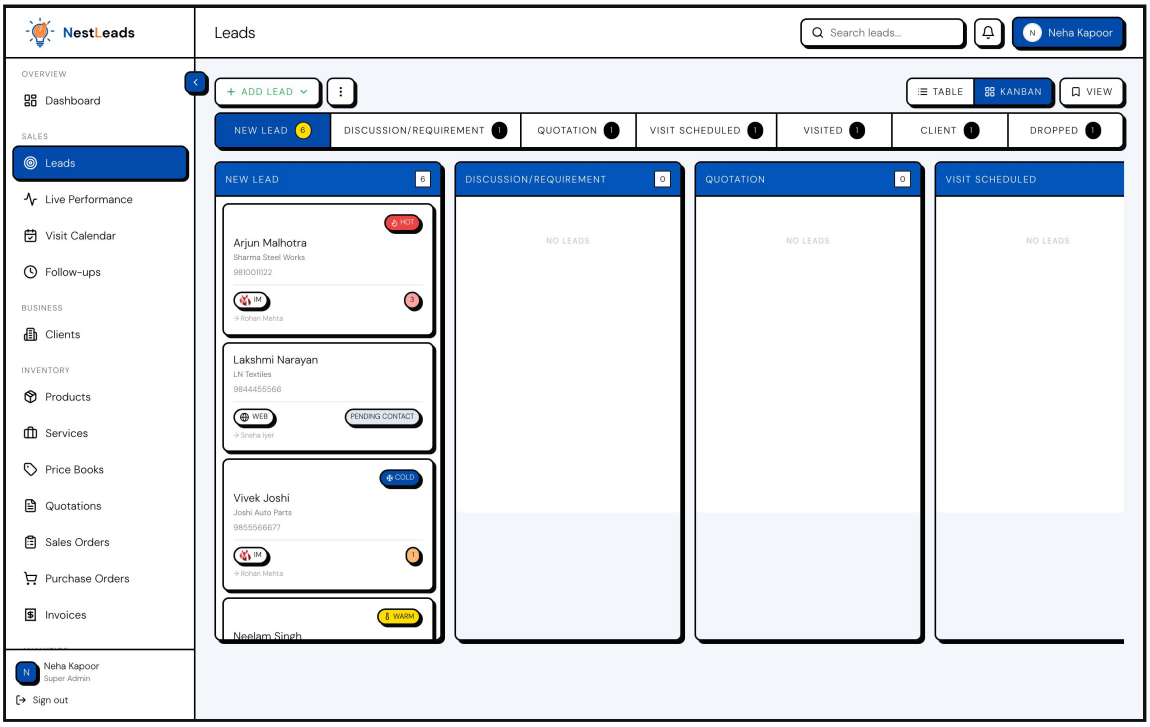


Figure 7. Kanban board.

Saved views and columns

Leads › View

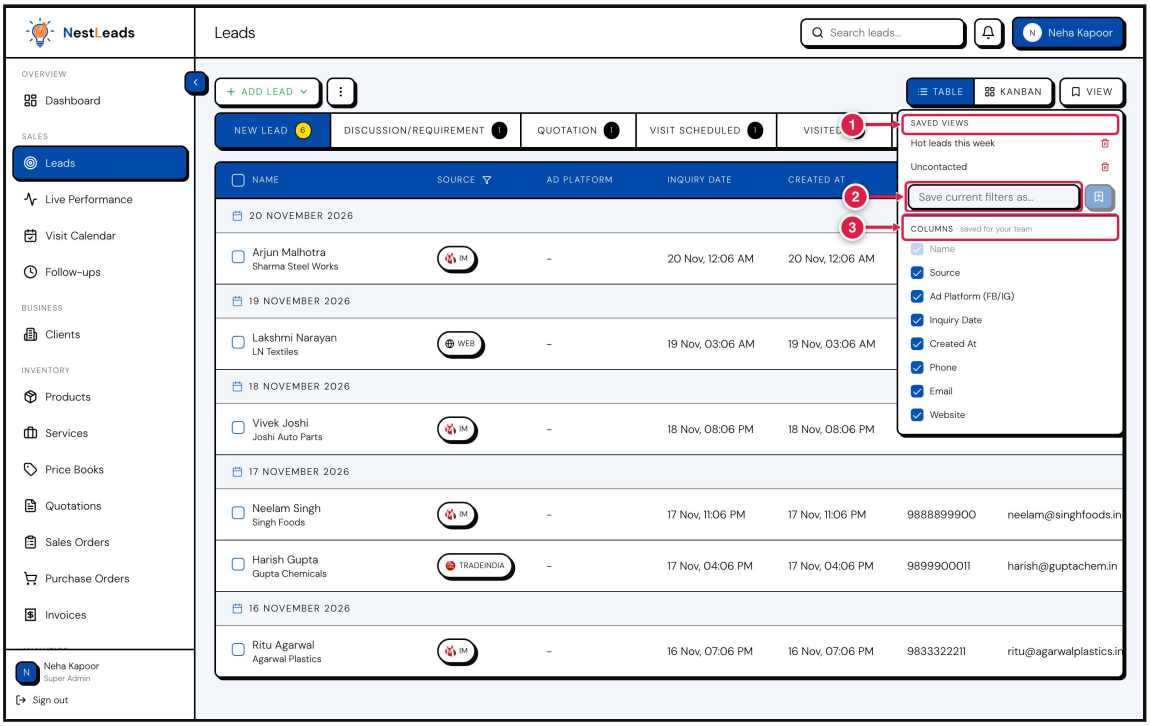


Figure 8. The View menu.

1. **Saved views**: one-click filters, for example hot leads this week.
2. **Save current filters**: name your current search and filters.
3. **Columns**: choose which columns the table shows.

Bulk actions and export

- Tick the boxes on several rows to **change status**, **assign** or **delete** them together.
- Use the three-dots menu to **export**: all leads, the current view, only **Pending Contact** leads or selected rows.

> **TIP**
> Admins can choose which team members **receive auto-assigned leads**, so new enquiries are shared across the team without manual work.

SALES

Follow-ups and Visits

05

A lead that nobody follows up on is a lost lead. These two calendars keep promises visible.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Follow-ups, Visit Calendar	Super Admin, Admin, Sales Executive	See and act on follow-up dates and site visits

Follow-up calendar

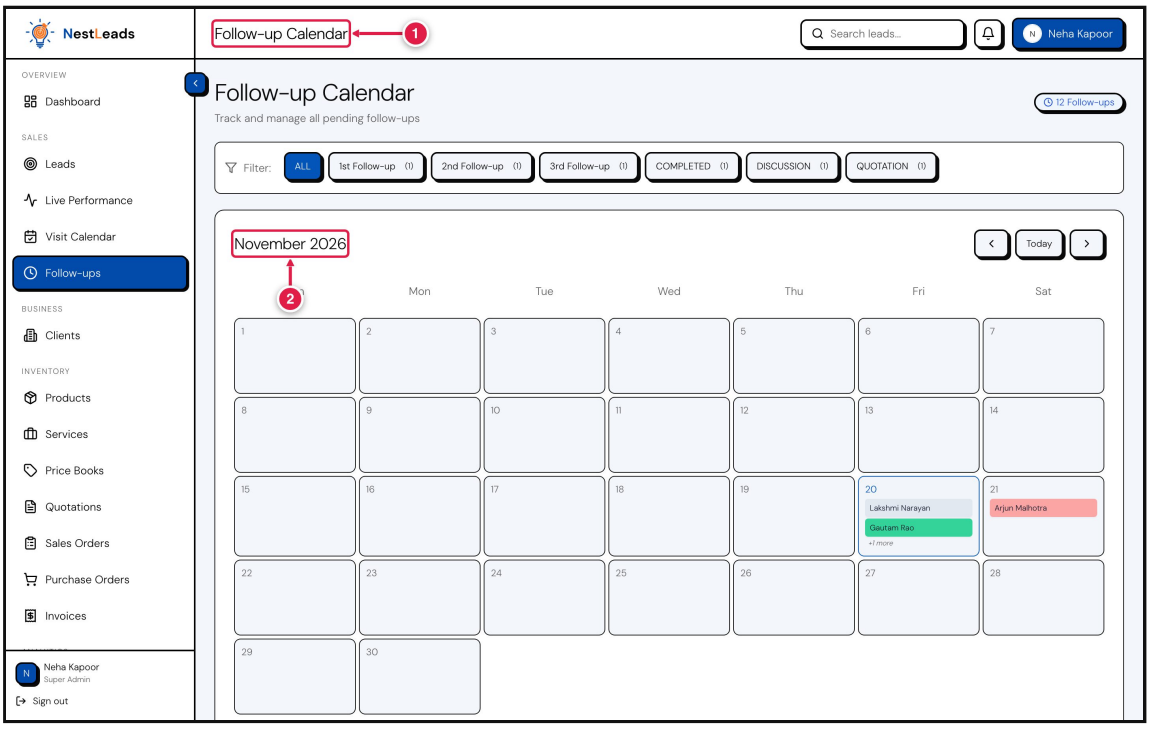


Figure 9. Follow-up Calendar.

1. **Page title and filters**: choose a stage or person.
2. **Month**: move between months. A coloured chip on a day shows who is due.

1. Open **Follow-ups** in the sidebar.
2. Find a day with a chip and click it to see the leads due.
3. Call or message the lead, then update the status and set the next follow-up date.

Visit calendar

When a customer agrees to a site or office visit, set the lead to **Visit Scheduled** with a date. It then shows here.

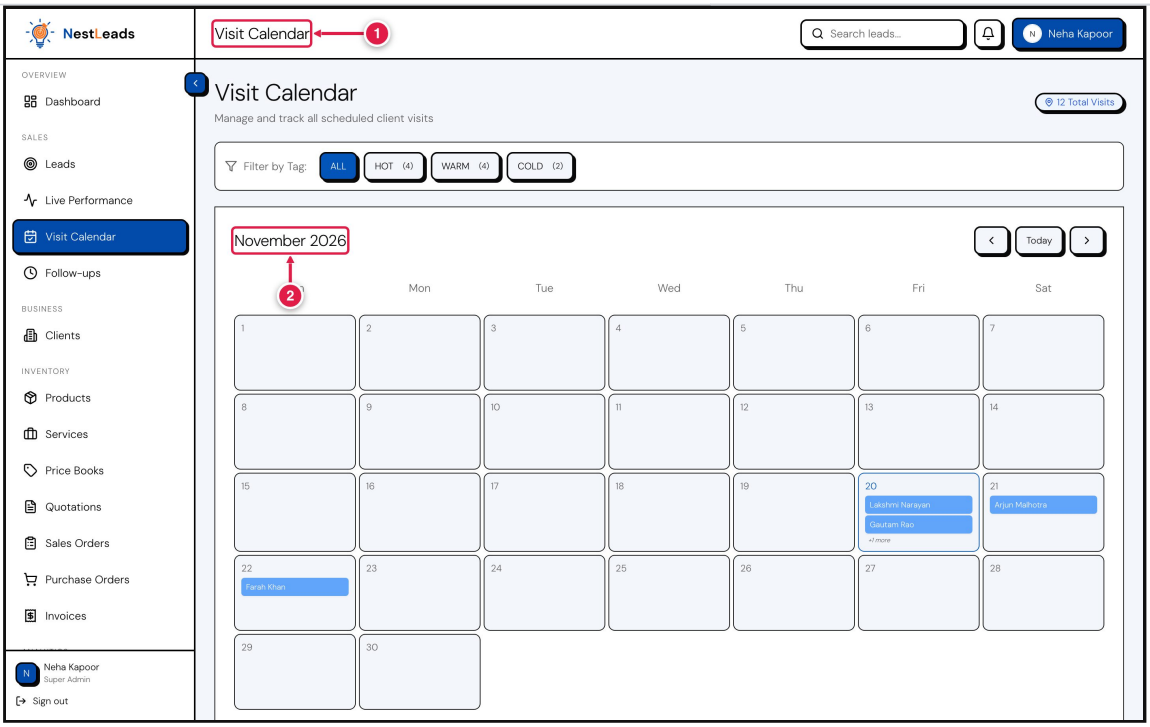


Figure 10. Visit Calendar.

1 **Page title**.

2 **Month** navigation. Click a visit to open the lead.

> **TIP**
> The bell icon and the dashboard's **Overdue follow-ups** card remind you of missed dates.

BUSINESS

Clients

06

When a lead is won, it becomes a client. Clients hold the long-term record: contact, GST, services and payment status.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Clients	All roles	Keep your customer list and project / payment status

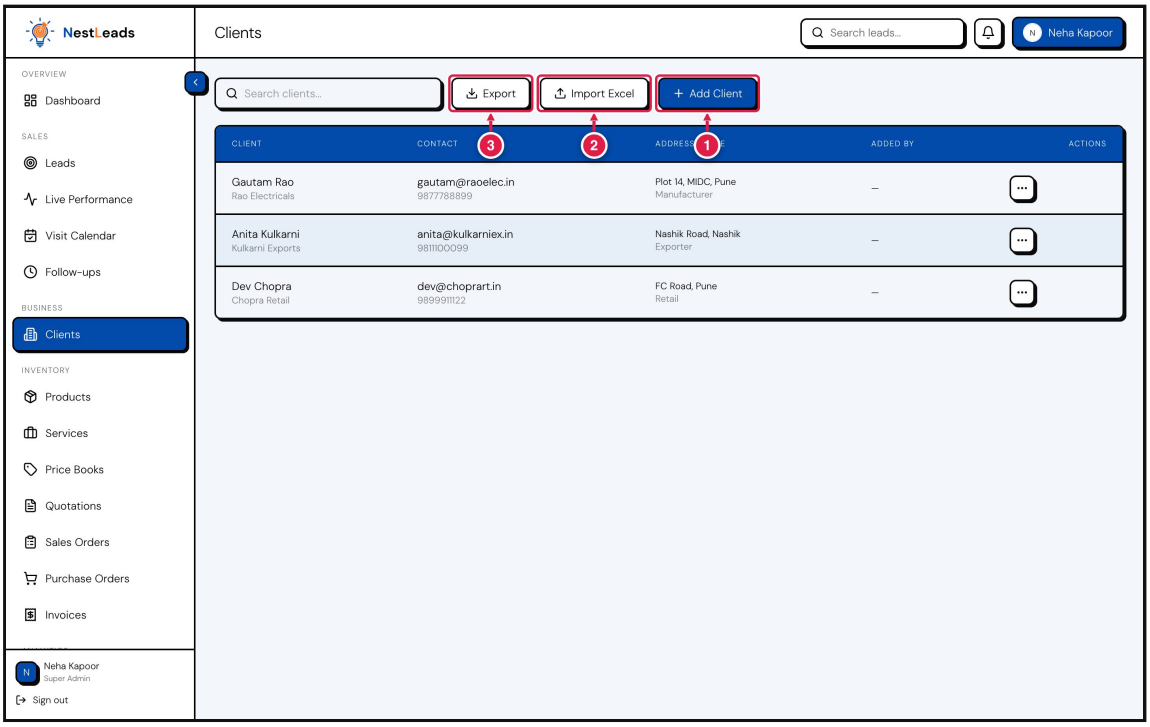


Figure 11. The Clients page.

1. **Add Client**.
2. **Import Excel**: bring an existing list.
3. **Export**: download the list.

Add a client

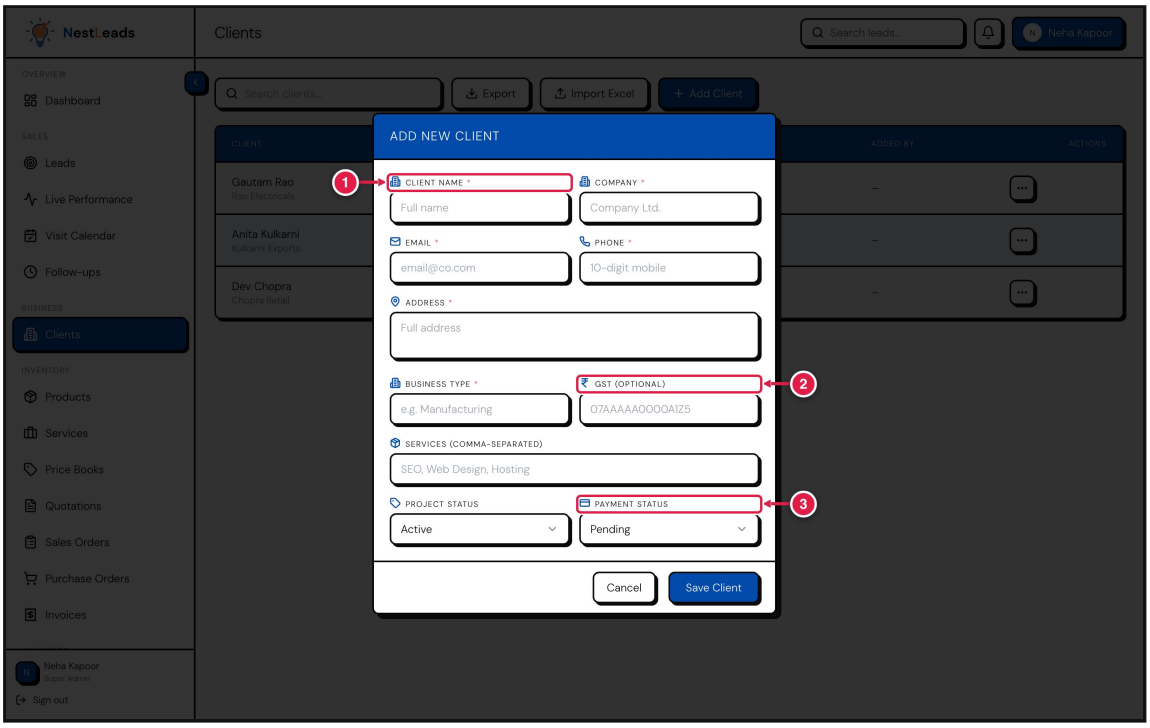


Figure 12. The Add New Client form.

1. **Client name** and company, email, phone, address.
2. **GST** (optional) and business type.
3. **Payment status** and project status.

1. Click **Add Client**.
2. Fill the details. Name, company, email, phone, address and business type are required.
3. Add the **services** you provide to this client, separated by commas.
4. Set **project status** (Active, Completed, On Hold) and **payment status** (Paid, Pending, Overdue). Save.

> **TIP**
> Winning a lead converts it to a client without retyping its details.

BUSINESS

Products, Services and Price Books

07

Keep what you sell in one list so quotations and orders fill in prices for you.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Products, Services, Price Books	Super Admin, Admin and sales / service roles	Maintain your catalogue and special price lists

Products

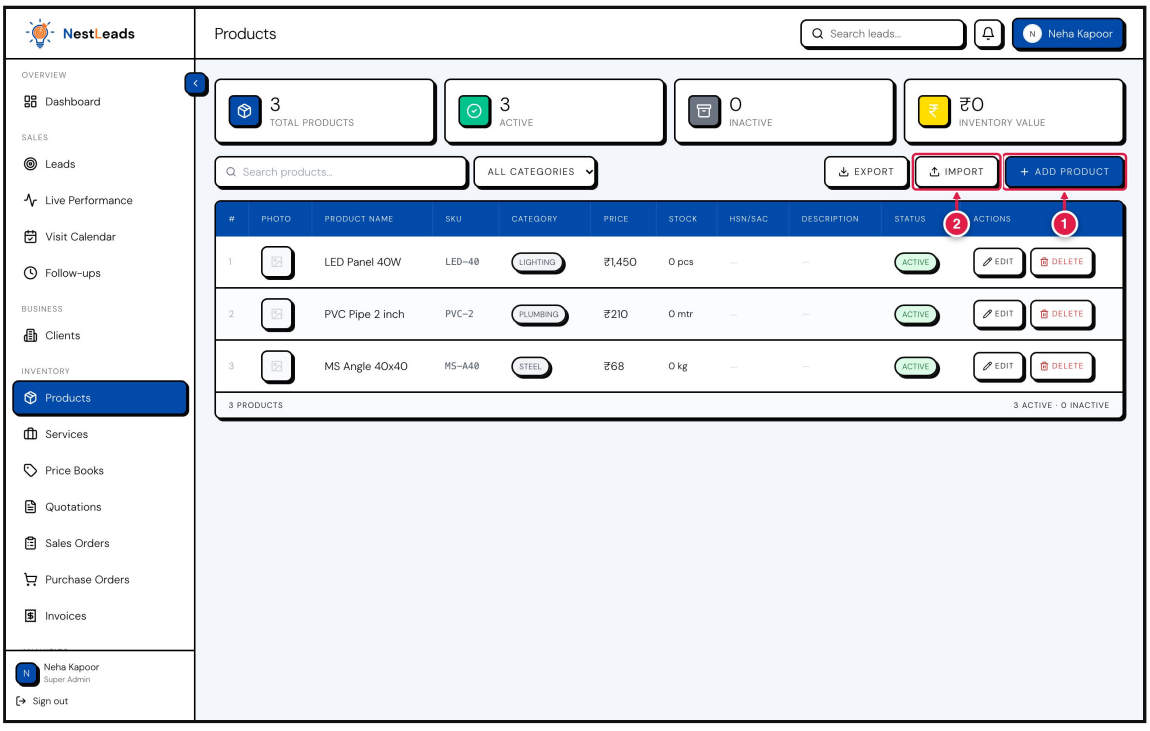


Figure 13. The Products page.

1. **Add Product**.
2. **Import**: upload many products from a file.

1. Open **Products** and click **Add Product**.
2. Add up to five photos, then the **product name**, **SKU**, **category**, **price**, **unit**, **stock quantity**, **tax rate** and **HSN / SAC code**.
3. Choose **Active** or **Inactive**. Inactive products stay on record but are hidden from new quotations. Save.

Services and price books

- **Services**: what you deliver as work rather than stock, with a price, a responsible person, progress and timeline.
- **Price Books**: named price lists, for example a distributor or festival price list, that you can apply to a quotation.

BUSINESS

Quotations

08

Send a professional, numbered quotation as a PDF in a few minutes.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Quotations	Super Admin, Admin, Sales Executive, Accountant	Create, send and track quotations

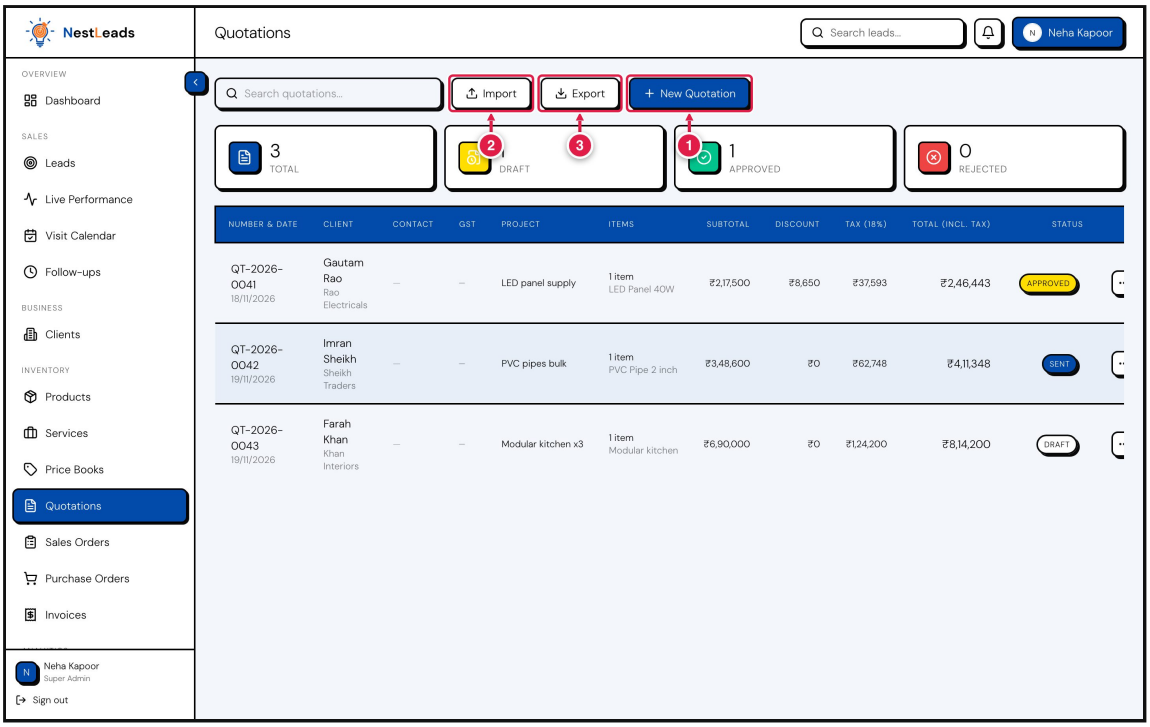


Figure 14. The Quotations page.

1. **New Quotation**.
2. **Import** existing quotations.
3. **Export** the list.

Create a quotation

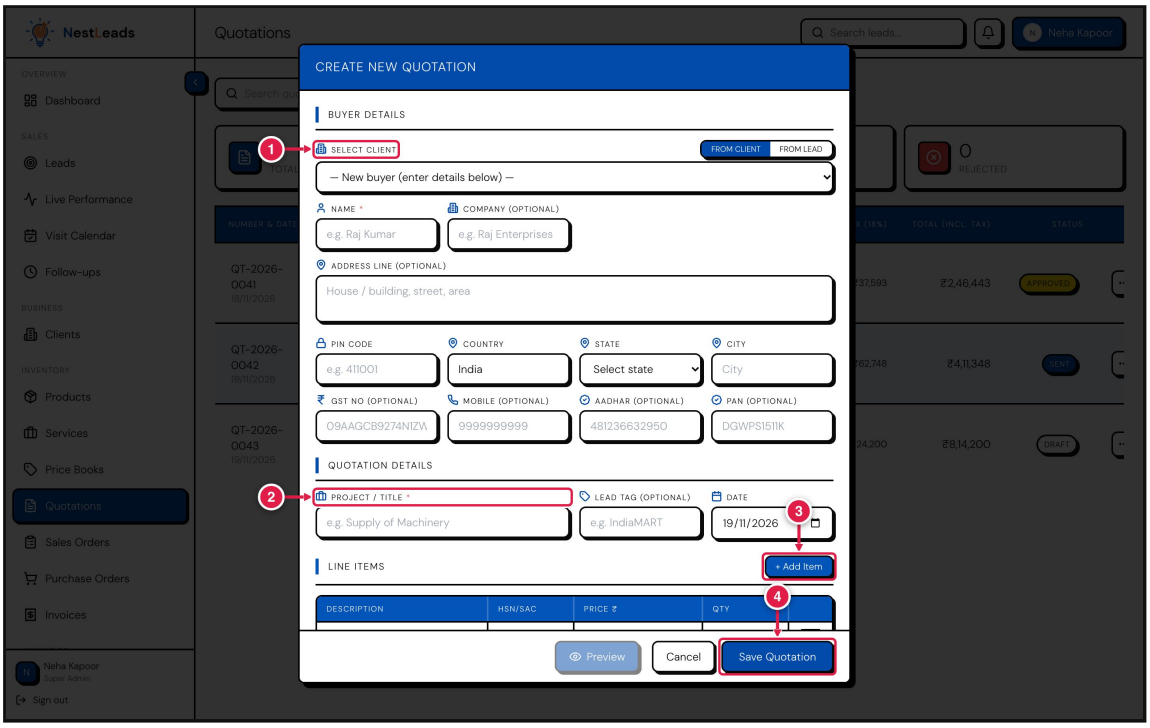


Figure 15. The Create New Quotation form.

1. **Select client**: pick a client or lead, or type a new buyer.
2. **Project / title**.
3. **Add Item**: lines with description, HSN/SAC, price and quantity.
4. **Save Quotation**.

1. Click **New Quotation**.
2. Under **Buyer details**, choose **From client** or **From lead**, or enter a new buyer.
3. Under **Quotation details** enter the project title, an optional lead tag and the date.
4. Click **Add Item** for each product or service. Tax and totals are calculated for you; add a discount if agreed.
5. Click **Preview** to check the PDF, then **Save Quotation**.

Status of a quotation

Status	Meaning
Draft	Being prepared; not shared.
Sent	Shared with the customer.
Approved	Customer agreed.
Rejected	Customer declined.

> **NOTE**
> If **Quotation Approval** is on in Settings, a quotation must be approved by an admin before it can be sent.

TIP

Look and numbering (for example QT-2026-0041) are set in **Settings › Quotation Designer** and **Numbering**.

BUSINESS

09

Sales Orders, Purchase Orders and Invoices

These three pages share one layout: a party, line items, totals and a status.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Sales Orders, Purchase Orders, Invoices	Super Admin, Admin and sales / accounts roles	Turn an agreed quotation into an order and a bill

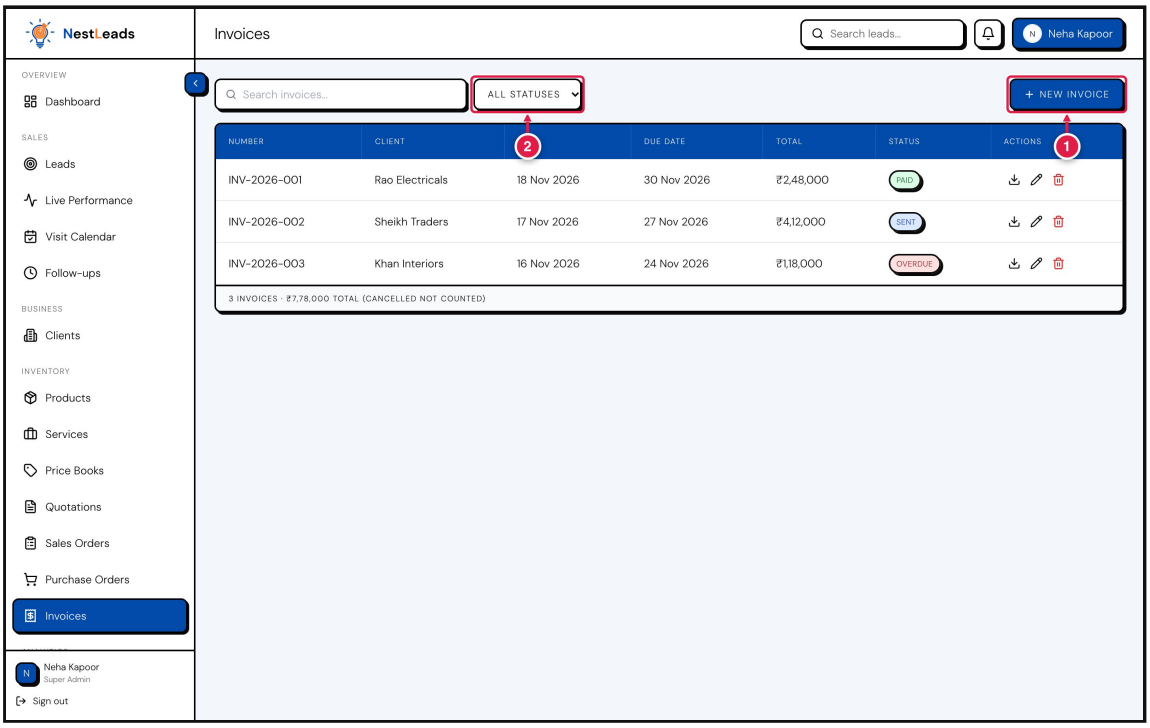


Figure 16. The Invoices page.

1. **New invoice** button.
2. **Status filter**: All, Draft, Sent, Paid, Overdue, Cancelled.

Page	Used for	Statuses
Sales Orders	A confirmed customer order	Draft, Confirmed, Fulfilled, Cancelled
Purchase Orders	An order you place with a supplier	Draft, Issued, Received, Cancelled
Invoices	A bill to a customer	Draft, Sent, Paid, Overdue, Cancelled

1. Open the page and click the **New** button.

2. Choose or type the client or supplier. Add a reference such as the quotation number.
3. Add items; pick a product to fill its price and tax. Set the date and, for invoices, the due date.
4. Save. Use the **download** icon on a row for a PDF, the pencil to edit, the bin to delete.

> **TIP**
> The totals above the table show the value of all documents that are not cancelled.

INSIGHT

Reports and Insights

10

Reports give you lists to download. Insights tell you what to change.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Reports, Insights	Super Admin, Admin	Export data and understand what is working

Reports

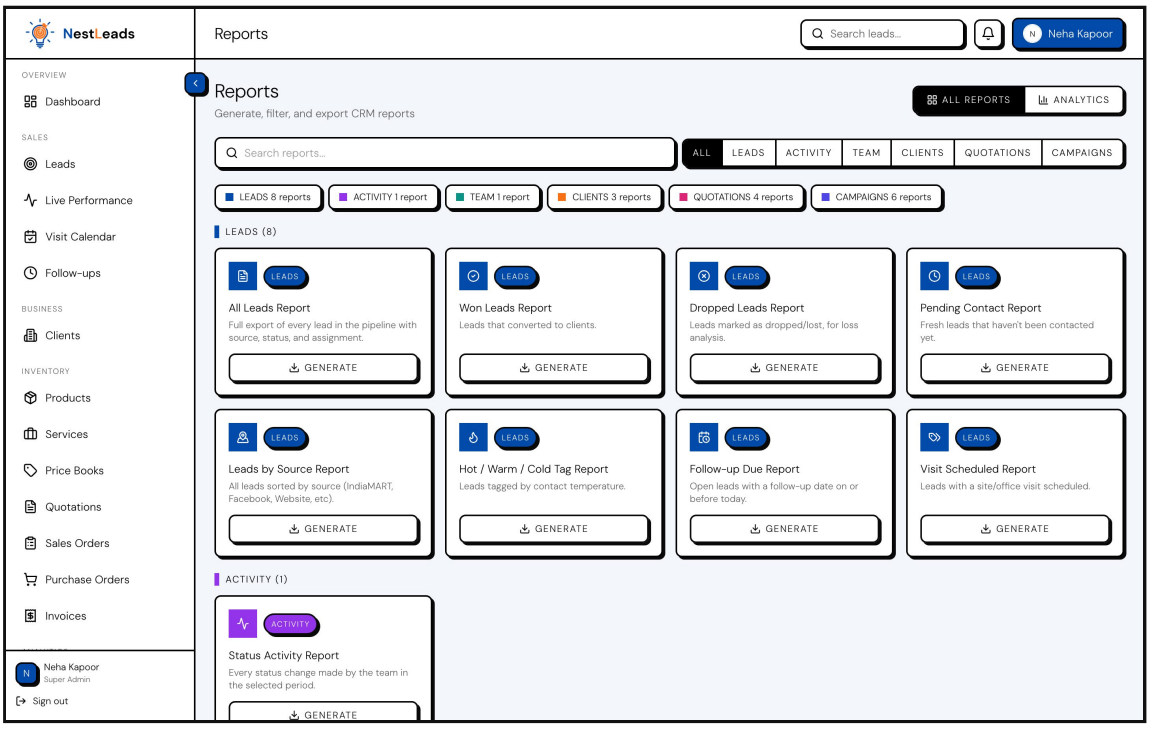


Figure 17. The Reports page.

Pick a report card and press **Generate**. Reports are grouped as **Leads** (all leads, won, dropped, pending contact, by source, hot-warm-cold, follow-up due, visit scheduled), **Activity**, **Team**, **Clients**, **Quotations** and **Campaigns**. Choose Today, This Week, This Month, This Year or a custom date range, then download as PDF or Excel.

Insights

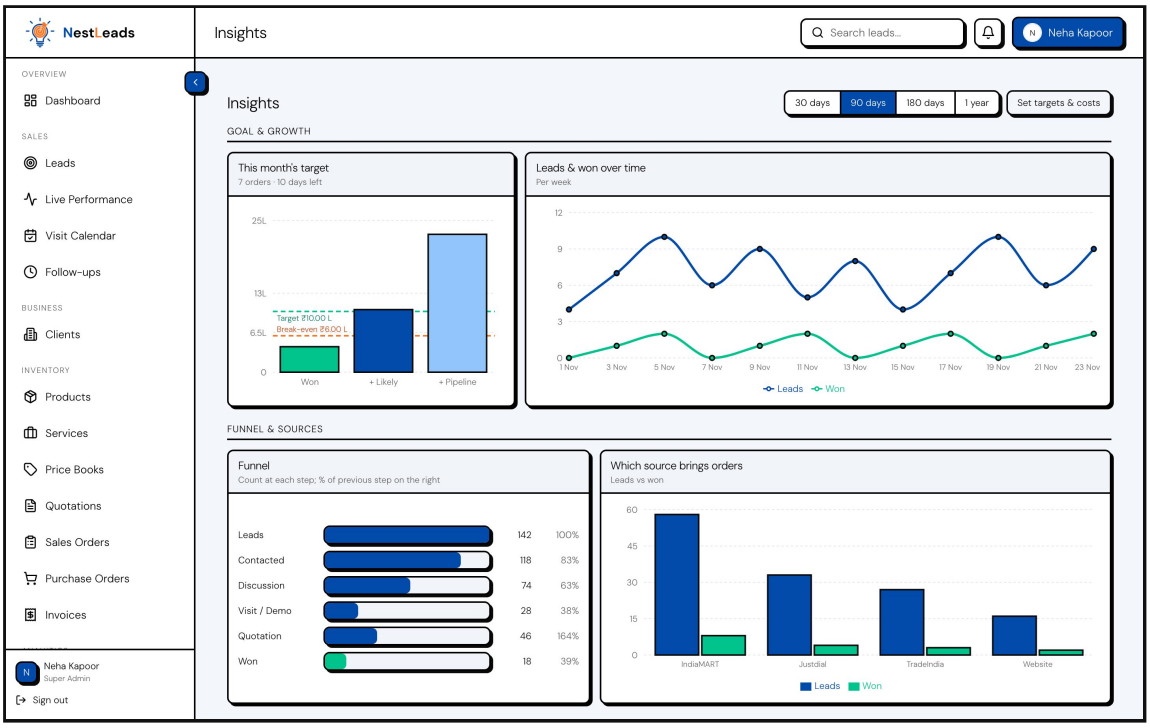


Figure 18. The Insights page.

Section	What it tells you
Goal and growth	This month's won value against your target and break-even, and leads against won over time.
Funnel and sources	How many leads reach each stage and which source brings paying customers.
Products	Which products get the most enquiries and orders.
Lost deals	Why you lose: reasons and competitors recorded when dropping a lead.
Response speed	How quickly new leads get a first reply. Fast replies win more orders.
Team	Leads, wins and win rate per salesperson.
Sales cycle	Average days to win and time spent in each stage.
Stuck leads	Open leads with no change for 7 or more days.

Insights › **Set targets & costs**

Click **Set targets & costs** to enter a monthly revenue target, fixed monthly costs (for break-even) and what you spend on each lead source. Insights then shows cost per lead and cost per order.

INSIGHT

Live Performance

11

A real-time view of how hard the team is working right now.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Live Performance	Super Admin, Admin	Watch calls, conversations and status updates against targets

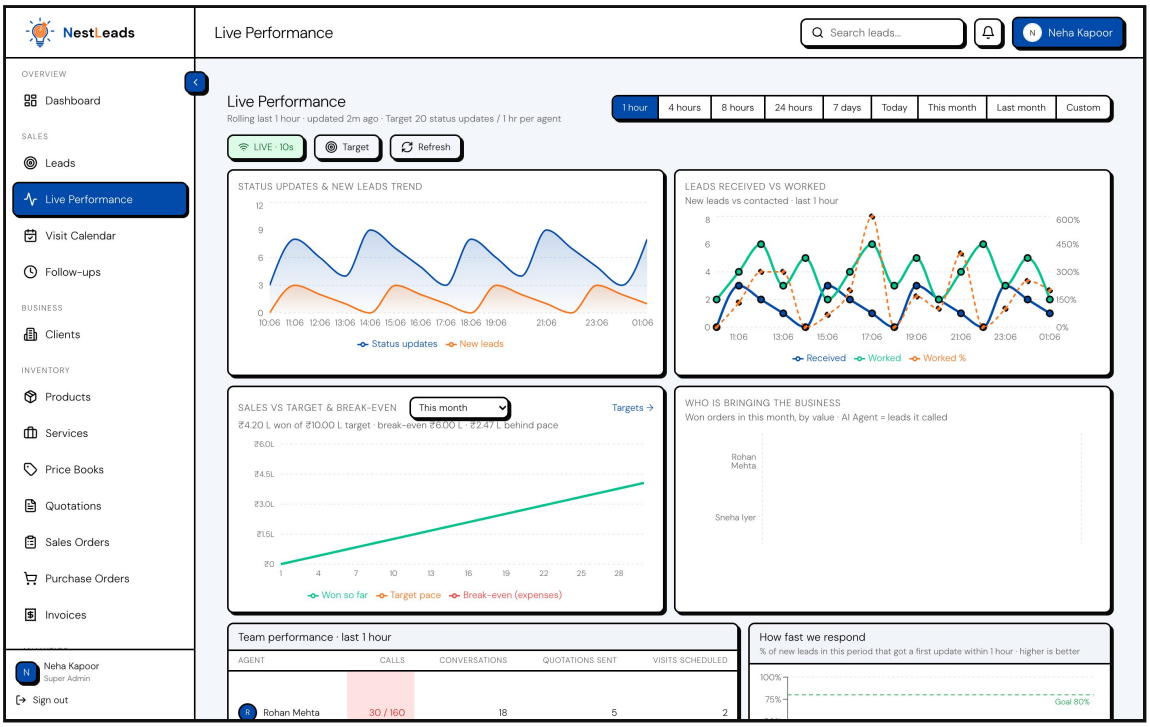


Figure 19. Live Performance.

- Pick a window: **1 hour, 4 hours, 8 hours, 24 hours, 7 days, This month** or a custom range.
- Each salesperson is shown green, amber or red against the target you set (for example 20 status updates per hour).
- See new leads arriving, how fast they are worked, and who is bringing in the business this month.
- Click **Target** to change the targets and whether work is counted by calls or by status updates.

NOTE

Salespeople see a small **pace badge** in the top bar showing how they are doing against the target.

MESSAGING

WhatsApp

12

Talk to leads on WhatsApp from inside NestLeads, and let automatic messages do the routine work.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
WhatsApp menu	Super Admin, Admin, Sales Executive (Auto Funnels and Setup: admins)	Inbox, broadcast campaigns, logs, documents and automatic funnels

Connect your number first

WhatsApp › Setup

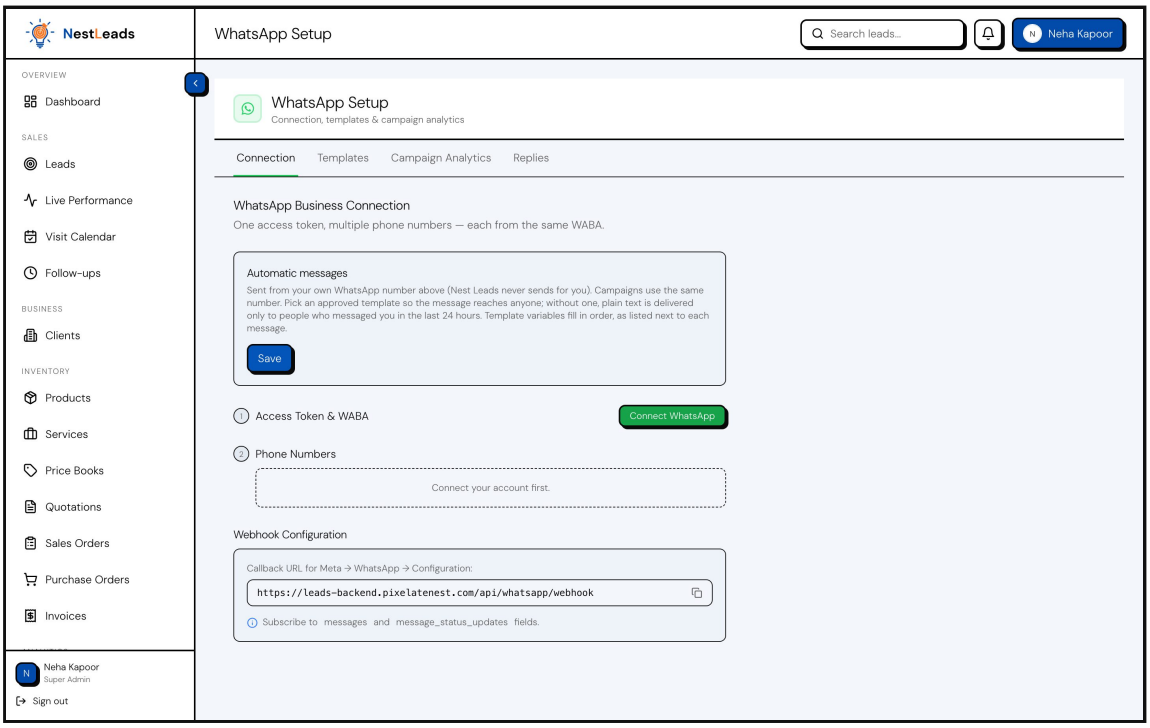


Figure 20. WhatsApp Setup.

1. Open **WhatsApp › Setup** and, on the **Connection** tab, click **Connect WhatsApp**.
2. Follow Meta's sign-in to give access to your WhatsApp Business Account. Your phone numbers are listed once connected.
3. Copy the **webhook URL** shown on the page into your Meta app if asked, and subscribe to messages.
4. Use the **Templates** tab to create message templates. Meta must approve a template before you can use it to start a conversation.

IMPORTANT

WhatsApp only lets you send free-form replies within 24 hours of the customer's last message. Outside that window use an approved template.

Inbox

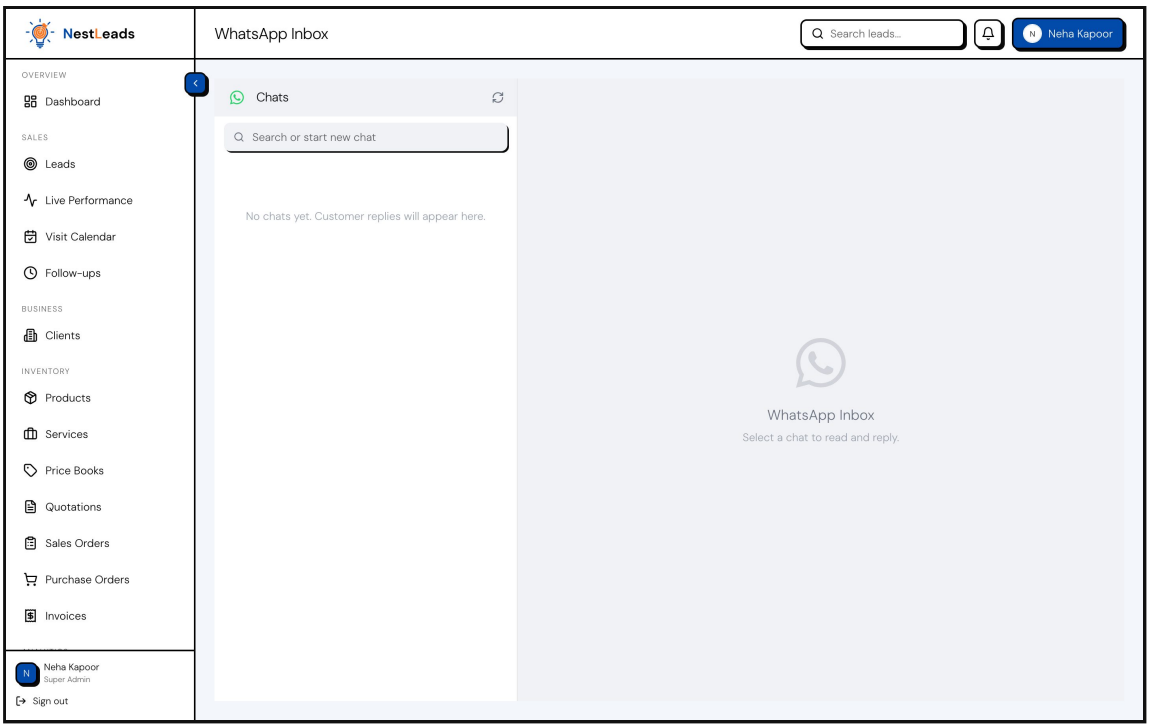


Figure 21. The WhatsApp Inbox.

Chats appear on the left; select one to read and reply. Search a name or number, or start a new chat. A chat with an unknown number can be turned into a lead.

Campaigns, Logs and Document Vault

- **Campaigns**: send an approved template to a selected group of leads.
- **Logs**: every message sent, with delivered, read and failed counts.
- **Document Vault**: store brochures, catalogues and price lists to send in one tap.

Auto Funnels

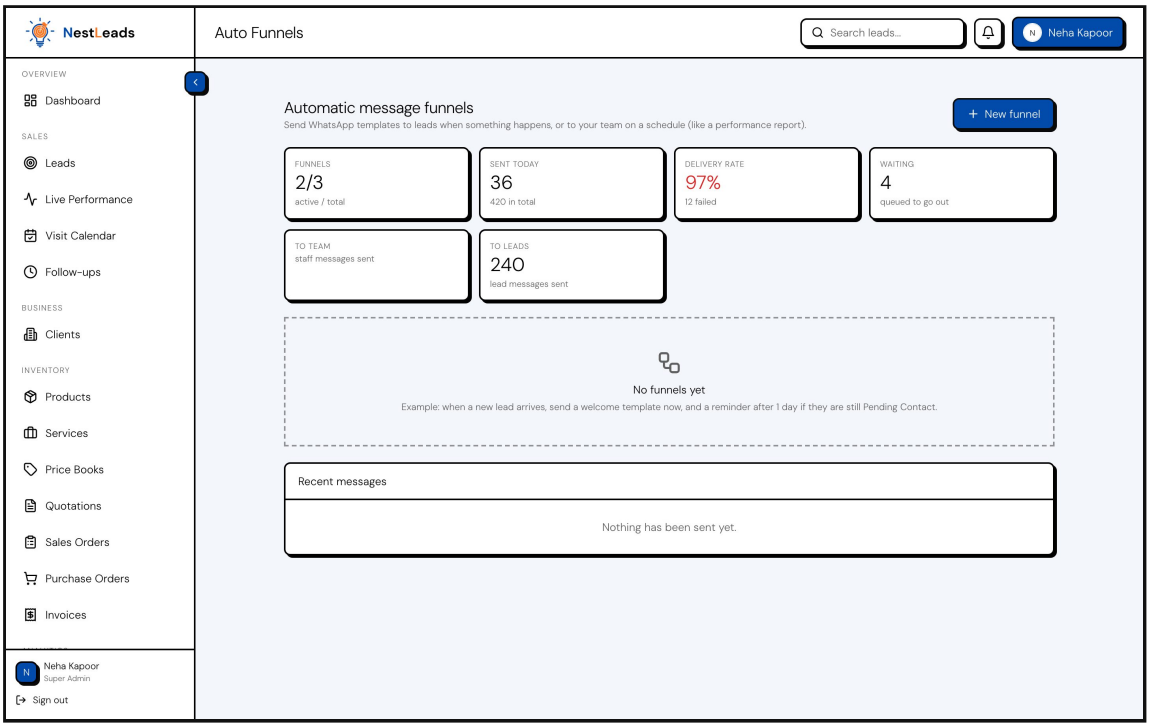


Figure 22. Auto Funnels.

A funnel sends WhatsApp templates automatically when something happens, for example a welcome message when a new lead arrives and a reminder a day later if they are still in **Pending Contact**. Click **New funnel**, choose the trigger and the templates, and switch it on. The cards show funnels active, messages sent today and the delivery rate.

MESSAGING

13 Social Media and Campaigns

Plan posts and manage ads without leaving your CRM.

Social Media planner

Open **Social Media** for **Analytics**, **Posts**, **Calendar** and **Accounts**. Connect your accounts, write and schedule posts, and see them on a calendar.

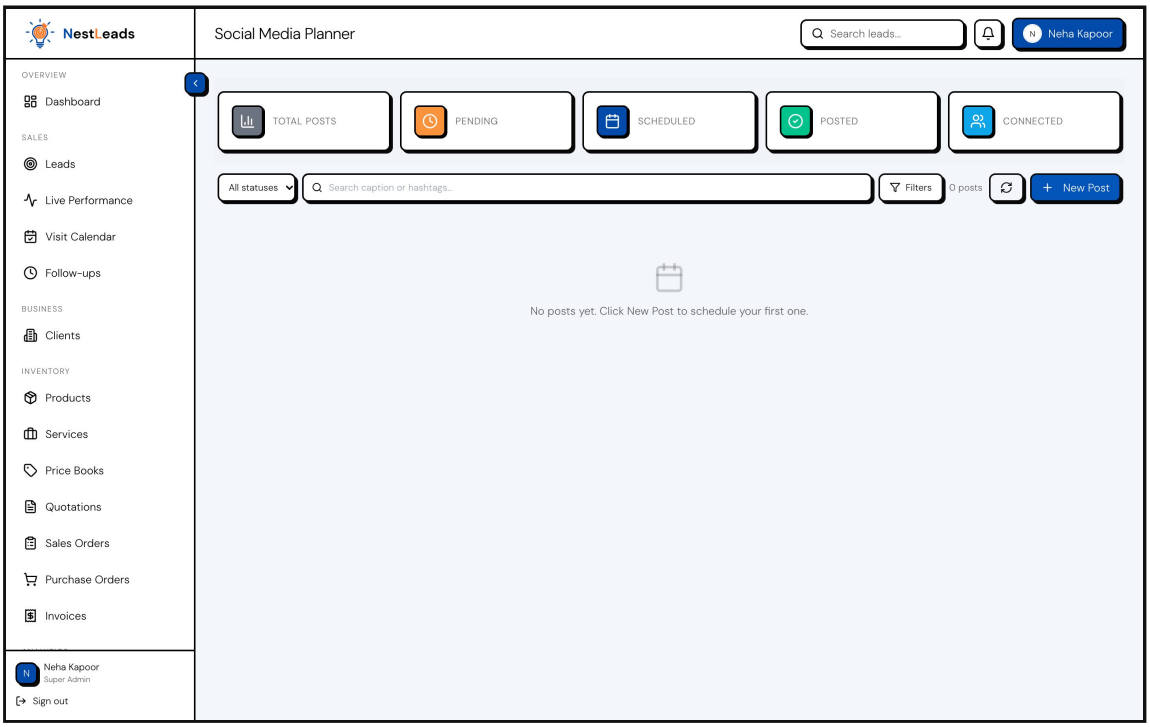


Figure 23. The Social planner.

Autopilot

Autopilot (admins) creates and publishes posts for you on the days you choose, within your plan's monthly limit. Use **Setup** to create a campaign and connect accounts, **Dashboard** to review, and **Report** for results.

Ad campaigns

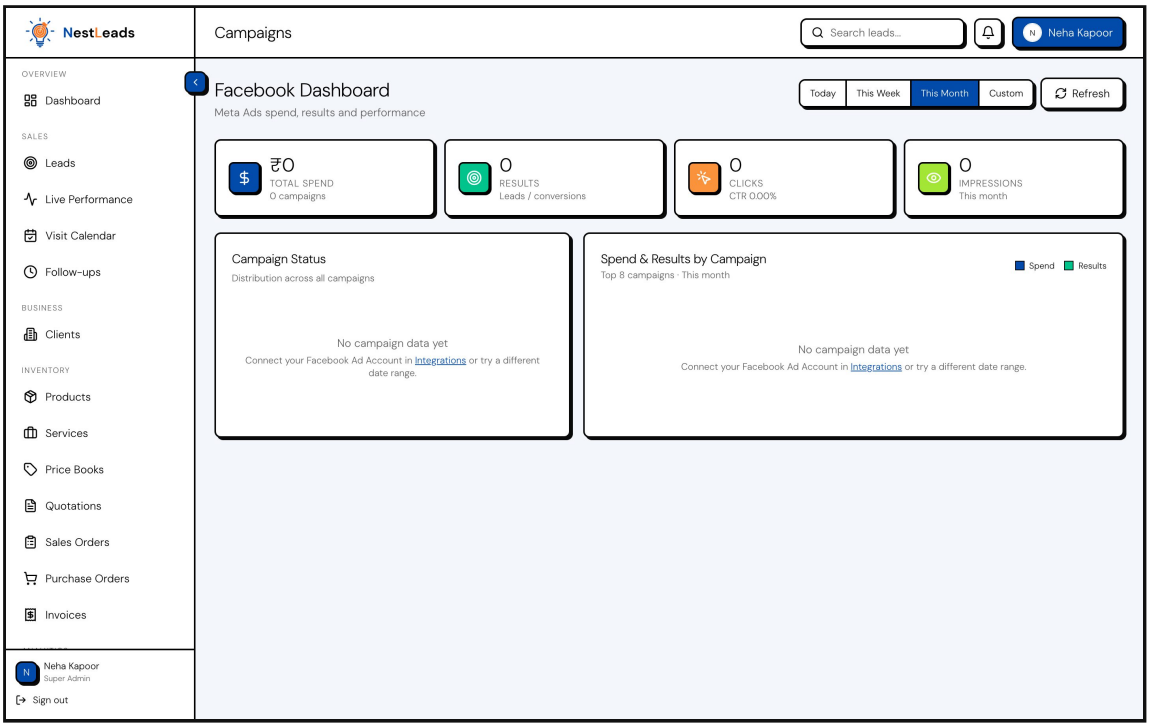


Figure 24. Facebook campaigns dashboard.

Campaigns has Facebook, LinkedIn and Google Ads sections, each with a dashboard, campaigns, ad sets or ad groups, and ads. Leads captured through lead forms flow into **Leads** after you finish the **Lead Sync Setup**. Admins also get **Campaign Management** and **Reports & Analytics** across platforms, and can build a new campaign with **New campaign**.

ADMINISTRATION

Team and Roles

14

Add your people, give them the right access, and share leads fairly.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Team	Super Admin, Admin	Add users, set roles and manage who receives leads

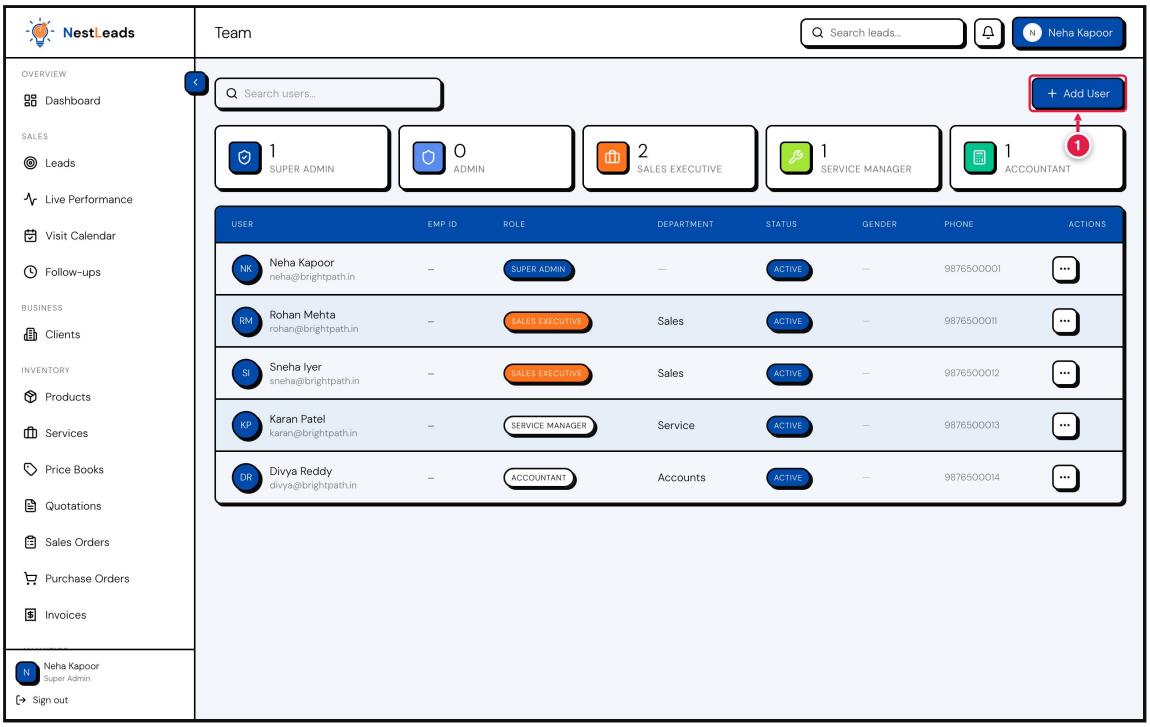


Figure 25. The Team page.

1 **Add User**.

Add a user

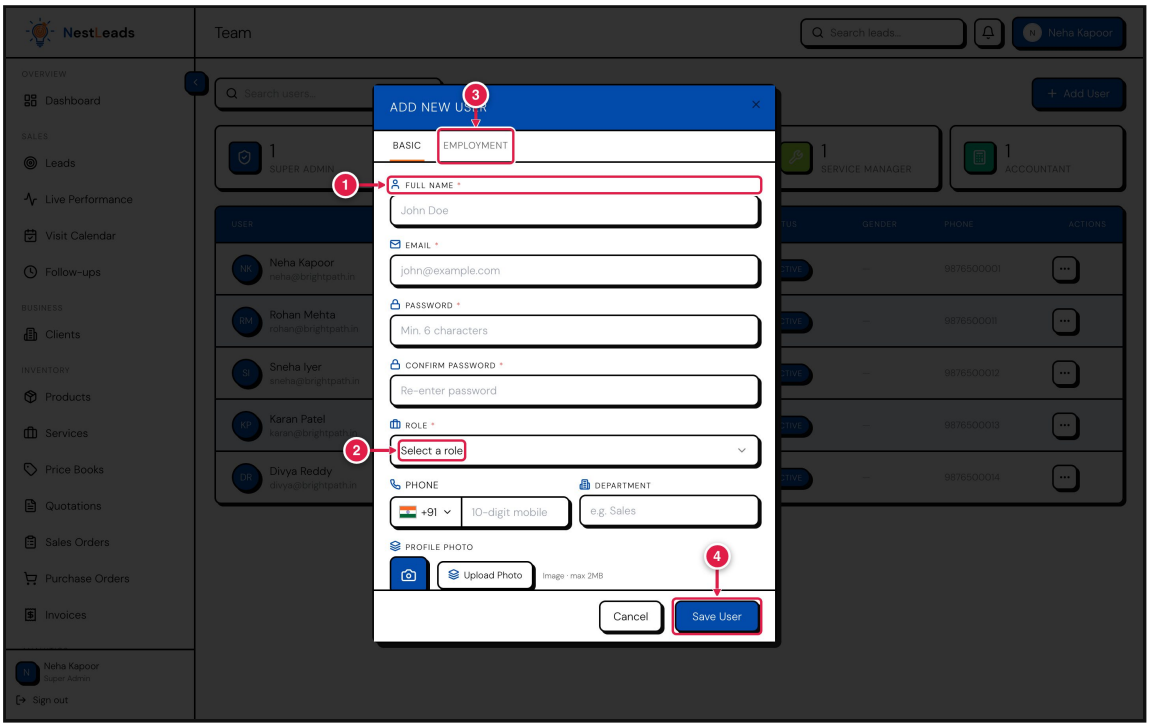


Figure 26. The Add New User form.

1. **Full name**, email, password and confirm password.
2. **Role**: Admin, Sales Executive, Service Manager, Accountant, or a custom role.
3. **Employment** tab for department and employee details.
4. **Save User**.

1. Click **Add User** on the Team page.
2. Enter name, email and a password of at least 6 characters, then confirm it.
3. Choose a **role**, then phone and department. Optionally add a profile photo.
4. Save. Tell the person their email and password; they can change it in Security.

Roles and permissions

The five built-in roles are shown in Chapter 1. In **Settings**, the **Roles** tab lets you create your own roles and the **Permissions** tab lets you choose, page by page, what each role can see and do.

> **IMPORTANT**
> Deactivating or deleting a user does not delete their leads. Reassign their leads to someone else.

ADMINISTRATION

Integrations and API Keys

15

Connect the places your enquiries come from so leads arrive by themselves.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Integrations, API Keys	Super Admin, Admin	Automatic lead capture and website forms

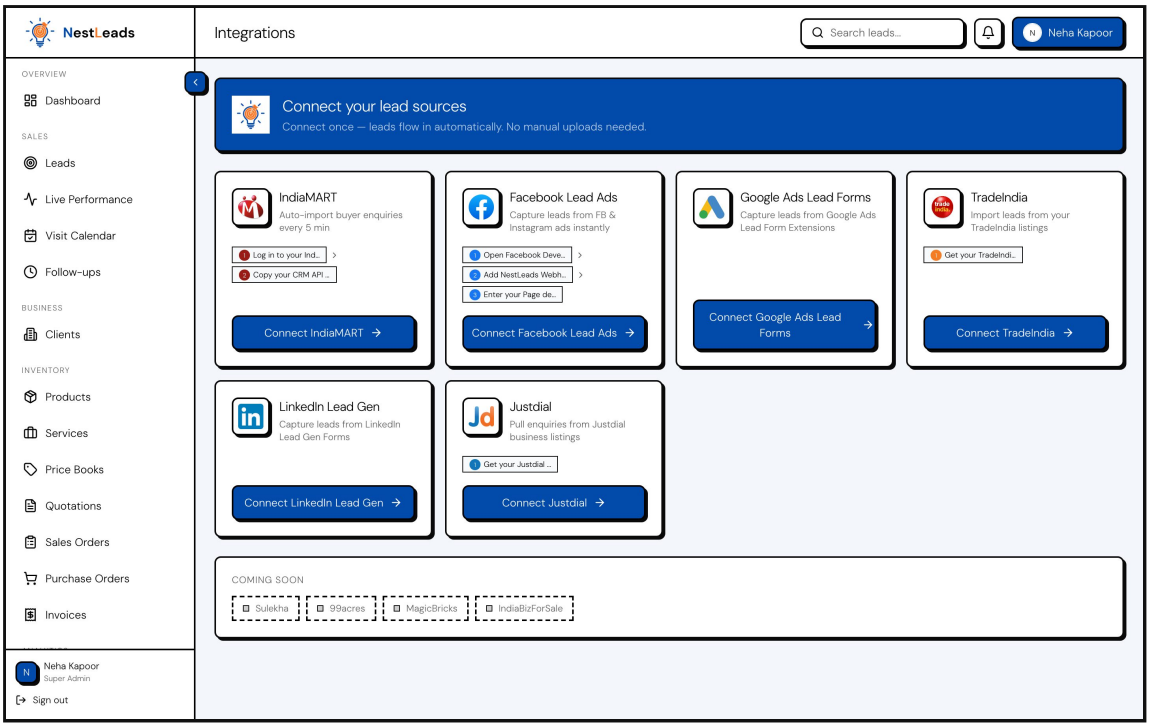


Figure 27. The Integrations page.

Source	What it brings in
IndiaMART	Buyer enquiries, imported automatically using your IndiaMART CRM key.
Facebook Lead Ads	Instant-form leads from Facebook and Instagram ads.
Google Ads Lead Forms	Lead form extensions from Google Ads.
TradeIndia	Listing enquiries.
LinkedIn Lead Gen	Lead Gen Form submissions.
Justdial	Business enquiries.

1. Open **Integrations** and choose a source card.

2. Read the short steps on the card; they list where to find your key or which page to connect.
3. Click **Connect** and paste the key or sign in with the platform.
4. Send a test enquiry. It should appear in **Leads** with that source.

API keys

API Keys lets your own website or another system send leads into NestLeads. Create a key, copy it once, and give it to your developer. You can revoke a key at any time.

> **IMPORTANT**
> Treat an API key like a password. Never put it in a public page or message.

ADMINISTRATION

Settings

16

Settings control how NestLeads looks and behaves for your whole company.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Settings	Super Admin, Admin (some tabs admin-only)	Company details, documents, lead statuses, roles and permissions

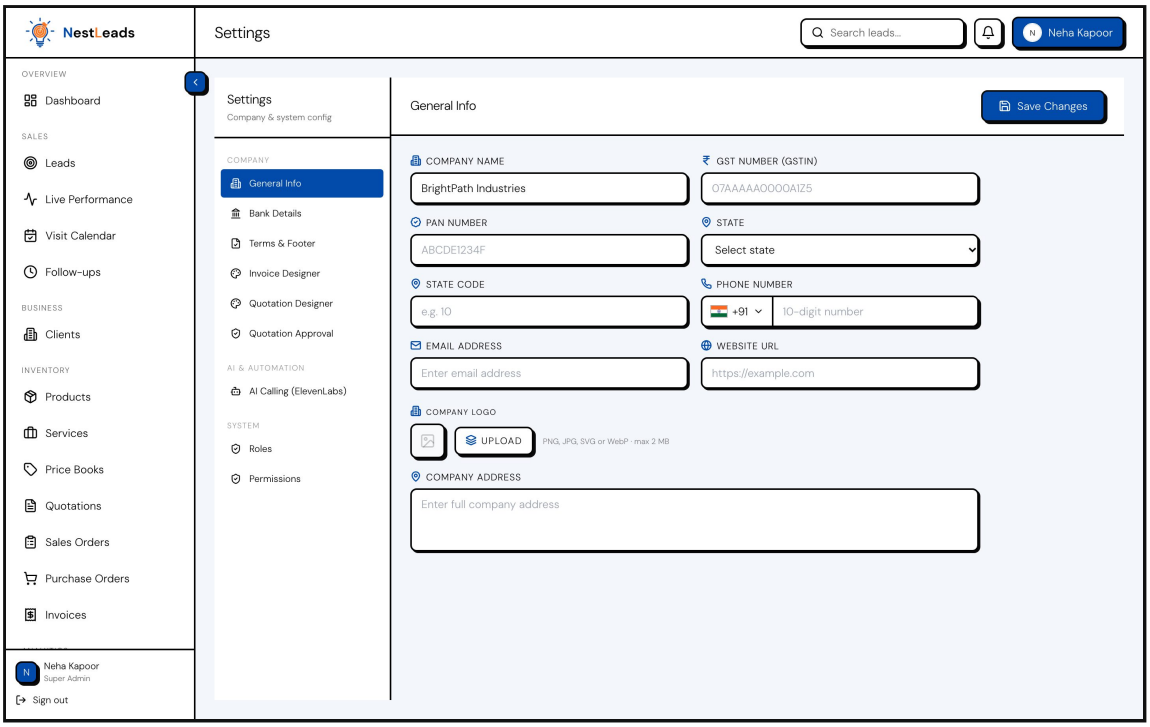


Figure 28. Settings, General Info tab.

Tab	What you set
General Info	Company name, GST, PAN, state, phone, email, website, logo and address.
Bank Details	Bank account printed on invoices and quotations.
Terms & Footer	Default terms and the footer text on documents.
Invoice / Quotation Designer	Layout, colours and fields of your PDFs.
Quotation Approval	Require admin approval before a quotation is sent.
Numbering	Prefix and next number for quotations, orders and invoices.

Tab	What you set
Lead Statuses	Rename stages or add your own (templates for real estate, manufacturing and services are offered).
AI Calling	Connect the AI calling agent.
Roles / Permissions	Custom roles and who can see what.

> **TIP**
> Fill **General Info**, **Bank Details** and **Terms** before your first quotation. They print on every document.

ADMINISTRATION

Billing and AI Usage

17

Manage your plan and see how much of it you are using.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Billing, AI Usage	Super Admin, Admin	Choose or change a plan and watch limits

Billing

Billing shows your current plan, how many leads you have used this month, your team size, AI call usage and days remaining. Below that, **Choose a Plan** compares Starter, Growth and Professional, monthly or yearly. Click **Upgrade Now** to pay online. Your past invoices are listed on the same page.

> **NOTE**
> If your plan expires, a notice appears and some features pause until you renew.

AI Usage

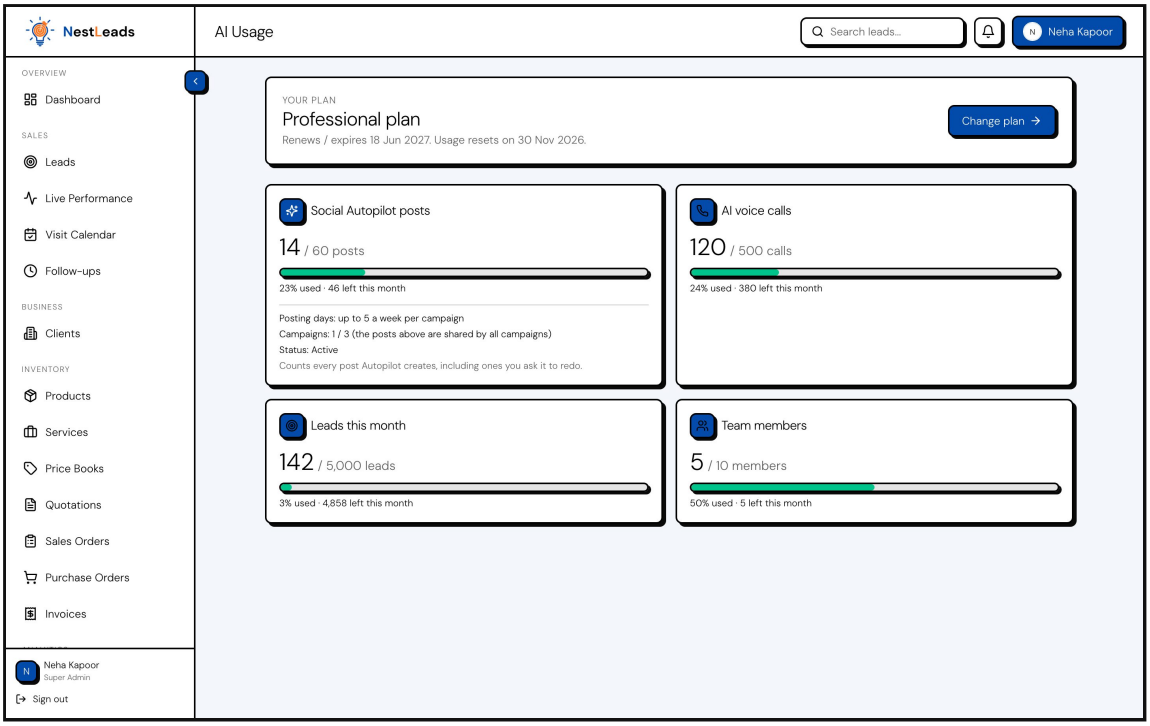


Figure 29. The AI Usage page.

AI Usage shows this month's use of Autopilot posts, AI calls, leads and team seats against your plan limits, and when they reset. A meter turns warning-coloured near its limit.

ADMINISTRATION

18 Activity Log, Trash, Support and Console

Safety nets and help.

Activity Log

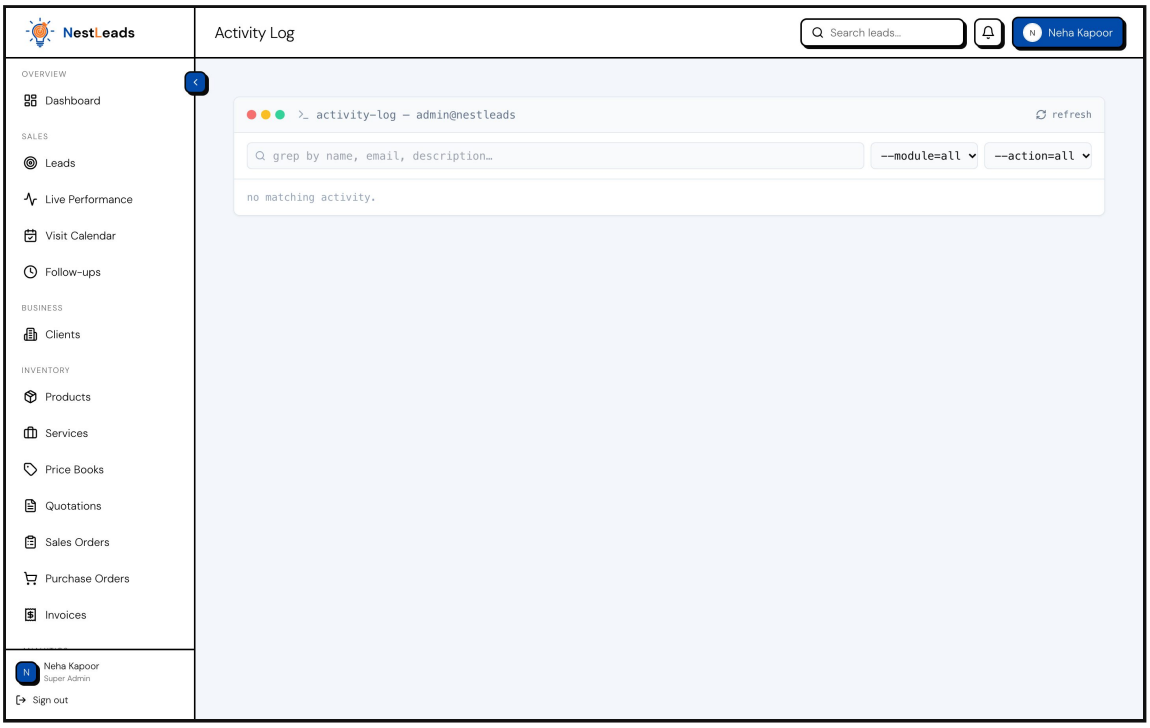


Figure 30. The Activity Log.

Admins can search every action in the workspace: who did what, when. Filter by module and action, or search by name, email or description. Use it to find who changed or deleted something.

Trash

Deleted leads and other records go to **Trash** first. Open **Trash** to restore an item or delete it forever.

Support



Figure 31. The Support page.

Click **Raise a Ticket**, describe the problem and what page you were on. Replies appear on the same page.

Console

The **Console** is a technical page for the Super Admin only. You will rarely need it.

MOBILE APP

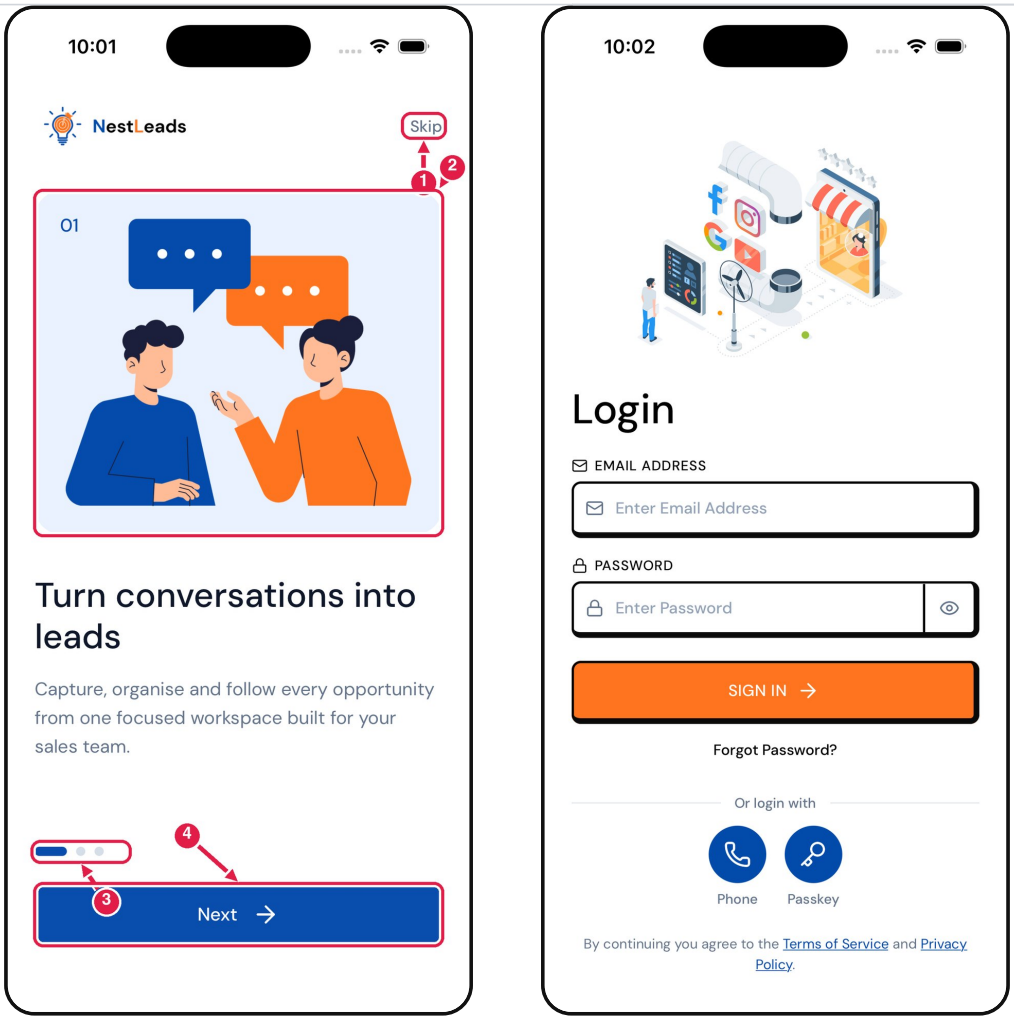
19 The Mobile App: Getting Around

The NestLeads mobile app (iPhone and Android) uses the same account as the website. A lead you add on your phone is on the website a moment later, and the other way round. It is built for the field: call, message and update a lead in a few taps.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
The NestLeads app on your phone	Everyone; the menu follows your role	Work leads, follow-ups, quotations and WhatsApp on the go

First launch

The first time you open the app you see three short introduction screens. Tap **Next**, or **Skip** to go straight to sign-in. When asked, tap **Allow** for notifications. Without them the app cannot alert you about new leads or follow-ups.



1. **Skip**: go straight to sign-in.
2. **Illustration and headline** for each of the three screens.
3. **Dots** show which screen you are on.
4. **Next**: move on.

Figure 32. The introduction screen (left) and the sign-in screen (right).

Sign in

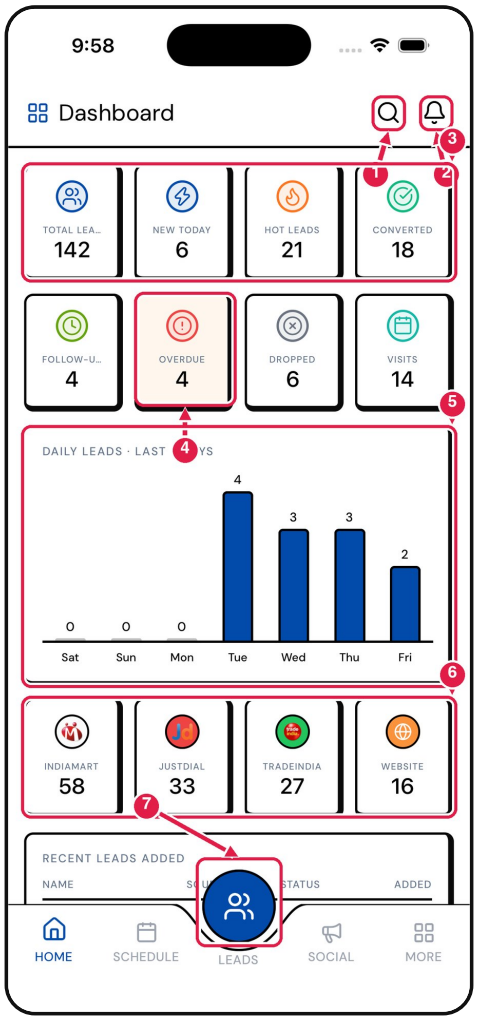
1. Enter the same **email and password** you use on the website.
2. If two-step sign-in is on, enter the code when asked.
3. Tap **Sign in**. You land on **Home**.

> **NOTE**
> Forgot your password? Use **Forgot password** on the sign-in screen. A reset link is emailed to you.

The bottom bar

Tab	What it opens
Home	The dashboard: lead counts, daily chart, sources and recent leads.
Schedule	A calendar of follow-ups and site visits.
Leads (round button)	Your lead list. This is where you spend most of the day.
Social	The social media planner.
More	Everything else: Clients, Quotations, orders, WhatsApp, settings and so on.

Home



1. **Search** across your leads.
2. **Notifications**: the bell shows unread alerts.
3. **Count tiles**: total, new today, hot, converted, follow-ups due, overdue, dropped and visits.
4. **Overdue**: promises you have missed. Tap to see them.
5. **Daily leads** for the last 7 days.
6. **Lead sources**: how many came from IndiaMART, Justdial, TradeIndia and your website.
7. **Leads button**: open the lead list from anywhere.

Figure 33. The Home tab.

Tips for using the app

- The icons at the top right of a list are your actions, for example **+** to add.
- **Pull down** on a list to refresh it.
- Tap the **back arrow** top left to return.
- Red ***** marks compulsory fields.

MOBILE APP

Leads on Mobile

20

Everything you do with a lead from the web works on your phone: look, call, message, update the stage and add notes.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Leads tab	Super Admin, Admin, Sales Executive	Work and add leads from your phone

The lead list



1. **Notifications** bell.
2. **Add** a new lead with **+**. The **...** menu next to it has **Sort**, **Sync**, **Export** and **Import**.
3. **Stage chips**: All, New, Discussion, Quotation and so on, with a count on each.
4. **A lead card**: name, company, phone, stage, priority, source, budget and when it arrived. Tap to open.
5. **Quick buttons**: call, WhatsApp and email the lead without opening it.
6. **Leads button**.

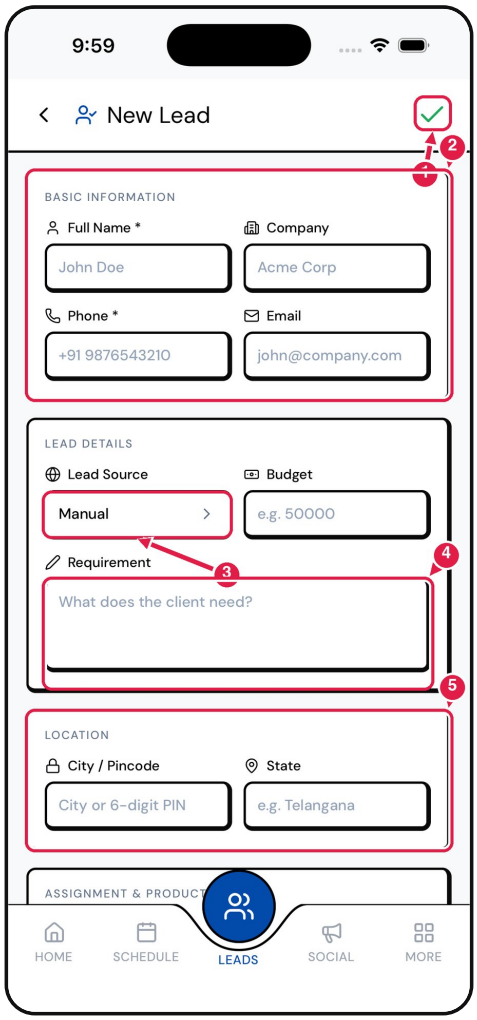
1. **Top-right icons**: **change status**, edit and delete.
2. **Name card** with the Hot / Warm / Cold tag and current stage.
3. **Contact buttons**: call, call via the app (it rings your phone first, then connects the lead), AI voice call, WhatsApp, email.
4. **Details**: phone, email, budget, owner, inquiry date, follow-up and requirement.
5. **Notes**: type a note and tap **Send**. Your team sees it on the website too.

Figure 34. The Leads tab (left) and a lead's detail (right).

Update a lead after a call

1. Open the lead and tap the **change status** icon (two arrows) at the top right.
2. Choose the new stage, set the Hot / Warm / Cold tag, add a remark and a follow-up date if needed.
3. Save. The change appears in the lead's history on both web and mobile.

Add a lead

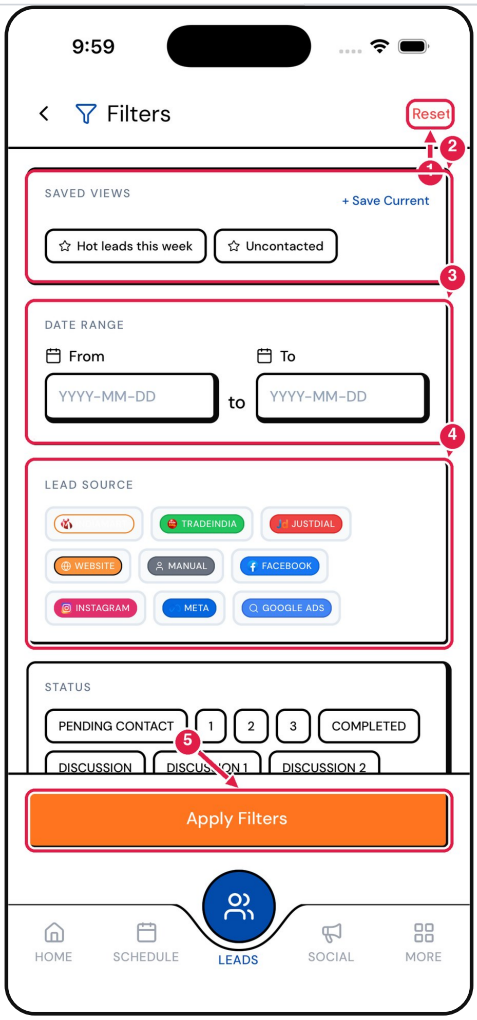


1. **Tick**: save the lead.
2. **Basic information**: full name and phone are compulsory.
3. **Lead source**: choose where it came from.
4. **Requirement**: what the customer needs.
5. **Location**: city or PIN code and state.

Figure 35. The New Lead form.

Filter and find leads

Open **Filters** from the lead list to narrow the list, then tap **Apply Filters**.



1. **Reset** clears every filter.
2. **Saved views**: one-tap filters such as Hot leads this week. **Save Current** keeps the filters you set.
3. **Date range**: from and to.
4. **Lead source and status**: tap to select one or more.
5. **Apply Filters**.

Figure 36. The Filters screen.

MOBILE APP

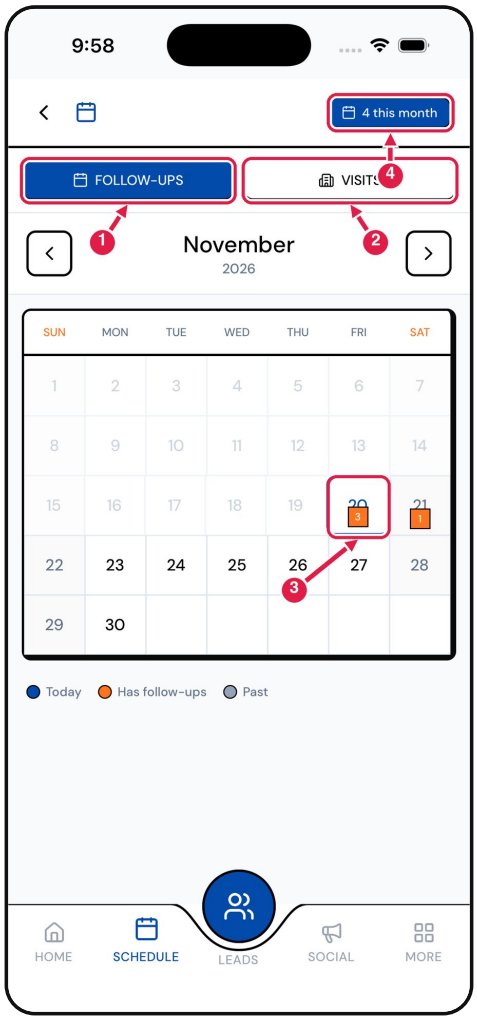
Schedule, Quotations and More

21

The rest of your daily tools: calendar, clients, quotations, WhatsApp and performance.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Schedule tab and More tab	Menu follows your role	Follow-ups, clients, quotations, WhatsApp and the team's pace

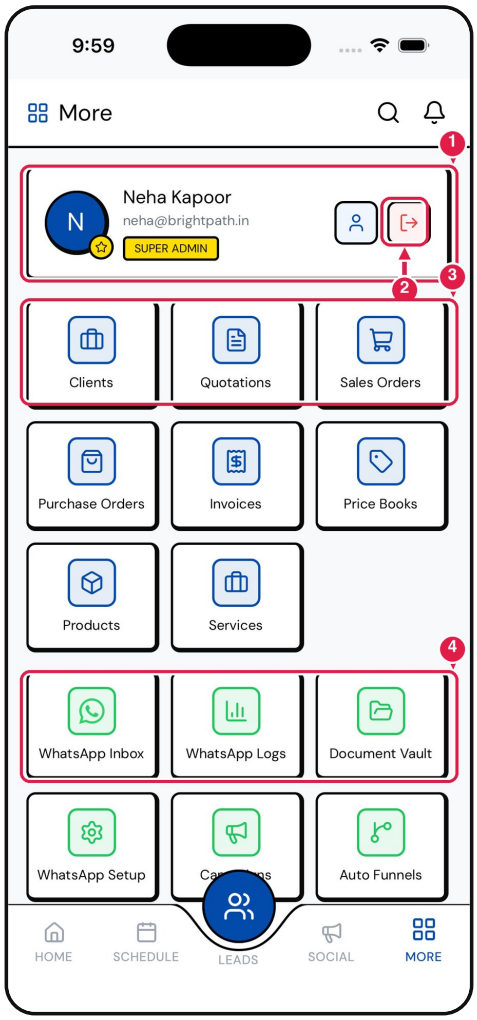
Schedule



1. **Follow-ups**: leads you promised to contact on each day.
2. **Visits**: scheduled site or office visits.
3. **Today** has a blue outline; a day with an orange badge has follow-ups. Tap it to see who.
4. **This month**: how many follow-ups remain this month.

Figure 37. The Schedule tab.

The More tab

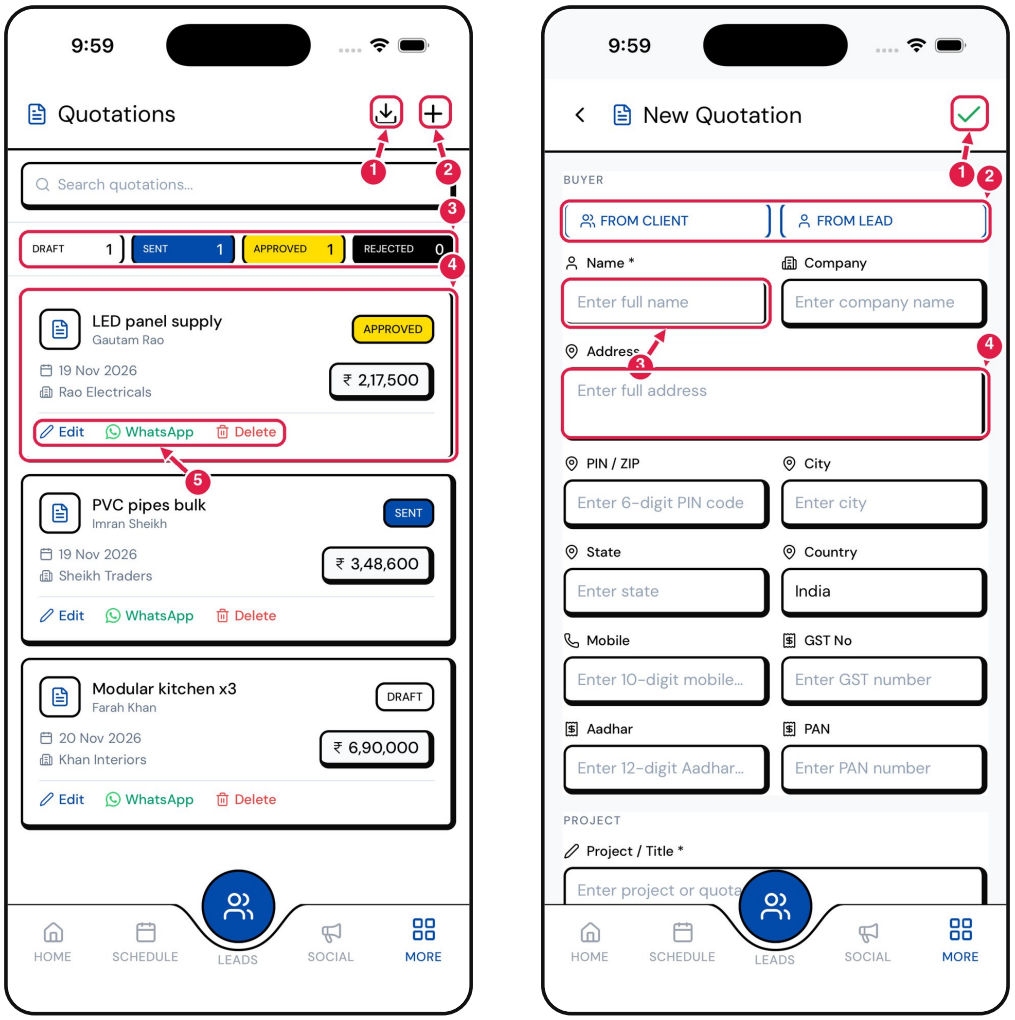


1. **Your profile**: name, email and role.
2. **Logout** button.
3. **Business tiles**: Clients, Quotations, Sales Orders, Purchase Orders, Invoices, Price Books, Products and Services.
4. **Messaging tiles**: WhatsApp Inbox, WhatsApp Logs, Document Vault, WhatsApp Setup, Campaigns and Auto Funnels.

Figure 38. The More tab.

Scroll down for more: Reports, Live Performance, Integrations, Users, Billing, Settings, Support and so on. Admins see more tiles than salespeople.

Clients and quotations



1. **Export** the list.
2. **Add** a quotation.
3. **Status chips**: Draft, Sent, Approved, Rejected with counts.
4. **A quotation card**: title, client, date, company and total.
5. **Actions**: Edit, send on WhatsApp, Delete.

1. **Tick**: save.
2. **From client / From lead**: fill the buyer from an existing record.
3. **Name** is compulsory; company is optional.
4. **Address** and the other buyer details.

Figure 39. Quotations list (left) and the New Quotation form (right).

Scroll down in the form for the project title, line items and totals, just as on the website.

WhatsApp

WhatsApp Inbox shows your customer conversations. Search by name or number, open a chat and reply. **WhatsApp Setup** (admins) shows the connection, phone numbers and webhook; the connection itself is done once on the website (Chapter 12).

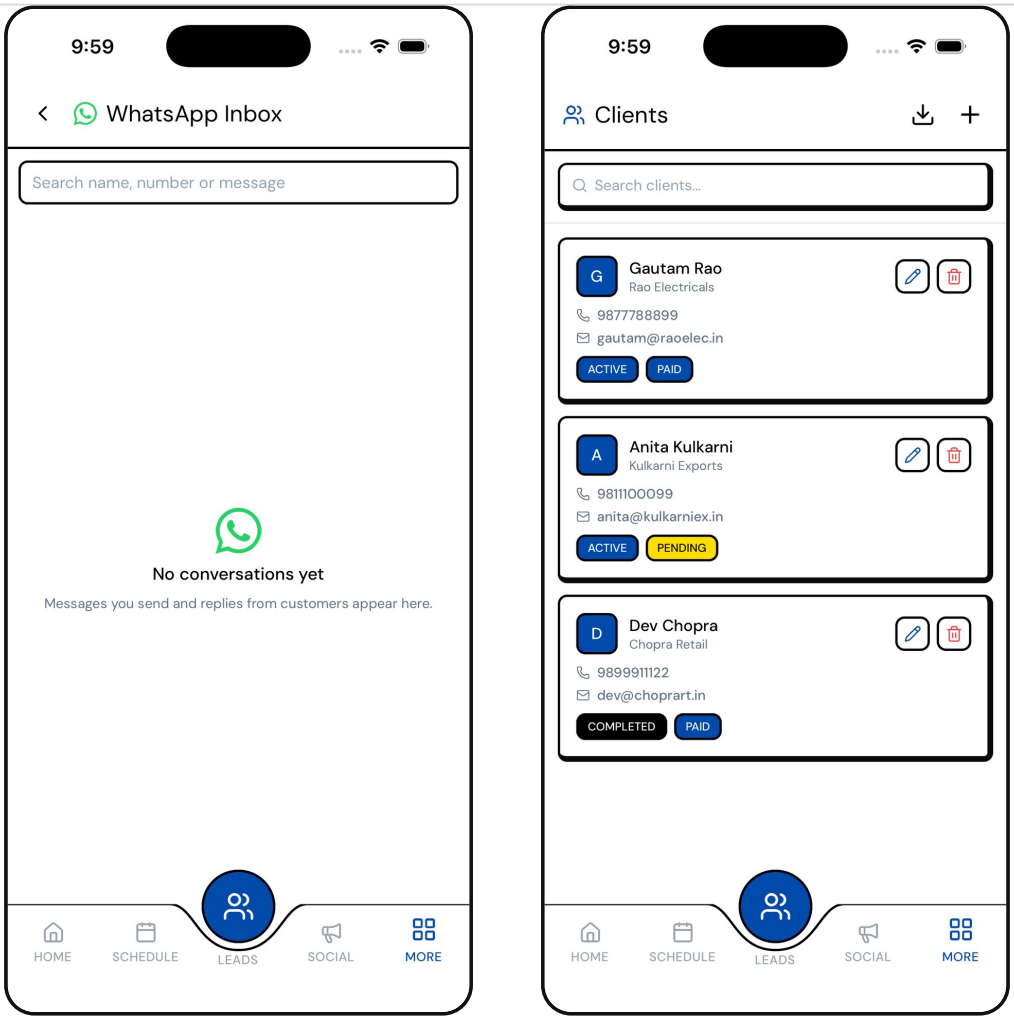
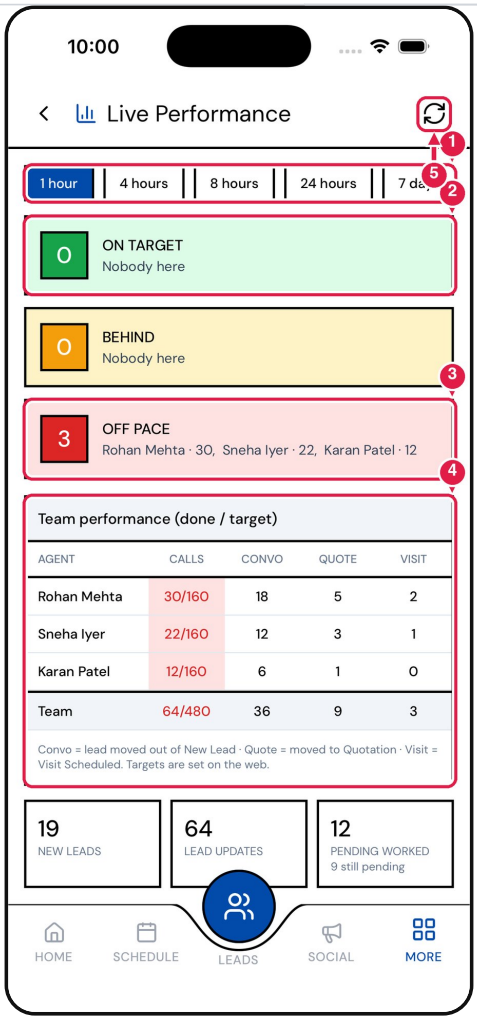


Figure 40. WhatsApp Inbox (left) and Clients (right).

Live Performance

Admins can check how the team is doing against its targets: who is on target, behind or off pace, and each person's calls, conversations, quotations and visits.



1. **Time window**: 1 hour, 4 hours, 8 hours, 24 hours, 7 days.
2. **On target**: people meeting the target in this window.
3. **Off pace**: people well below it.
4. **Team table**: calls (done / target), conversations, quotations and visits per person.
5. **Refresh**.

Figure 41. Live Performance.

> **NOTE**
> Targets are set on the website (Live Performance › Target). The mobile page shows them but does not change them.

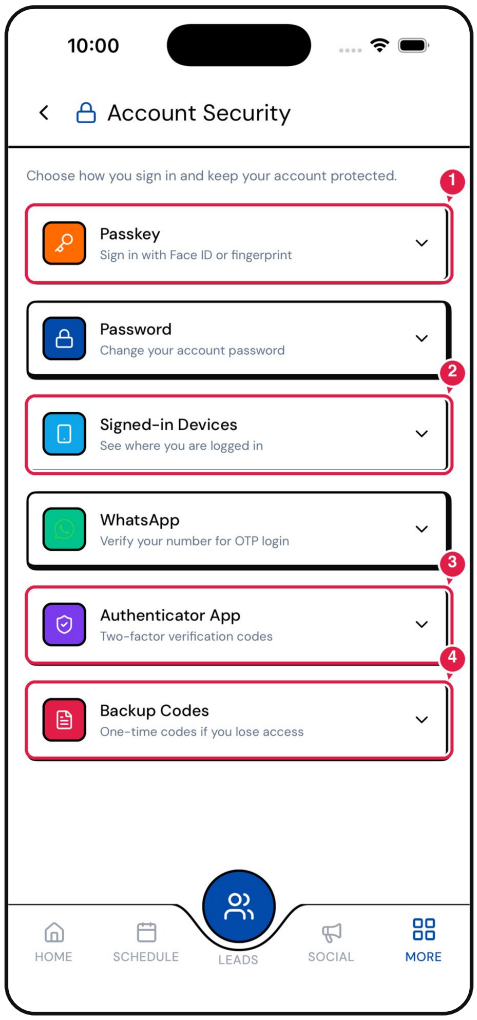
MOBILE APP

22 Account, Security and Notifications on Mobile

Keep your account safe and stay informed.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
More › Account Security, Settings, Notifications	Everyone	Passkey, password, devices, authenticator and alerts

Account Security



1. **Passkey**: sign in with Face ID or fingerprint.
2. **Signed-in devices**: see where you are logged in and sign out others.
3. **Authenticator app**: a 6-digit code as a second lock.
4. **Backup codes**: one-time codes if you lose your phone.

Figure 42. Account Security.

Password lets you change your password; **WhatsApp** verifies your number so you can sign in with a one-time code.

Notifications

The bell on **Home**, **Leads** and **More** opens your notification inbox: new leads, follow-up reminders and approvals. Tapping a notification opens the lead or page it is about. If you do not receive alerts, open your phone's **Settings** › **NestLeads** › **Notifications** and turn them on.

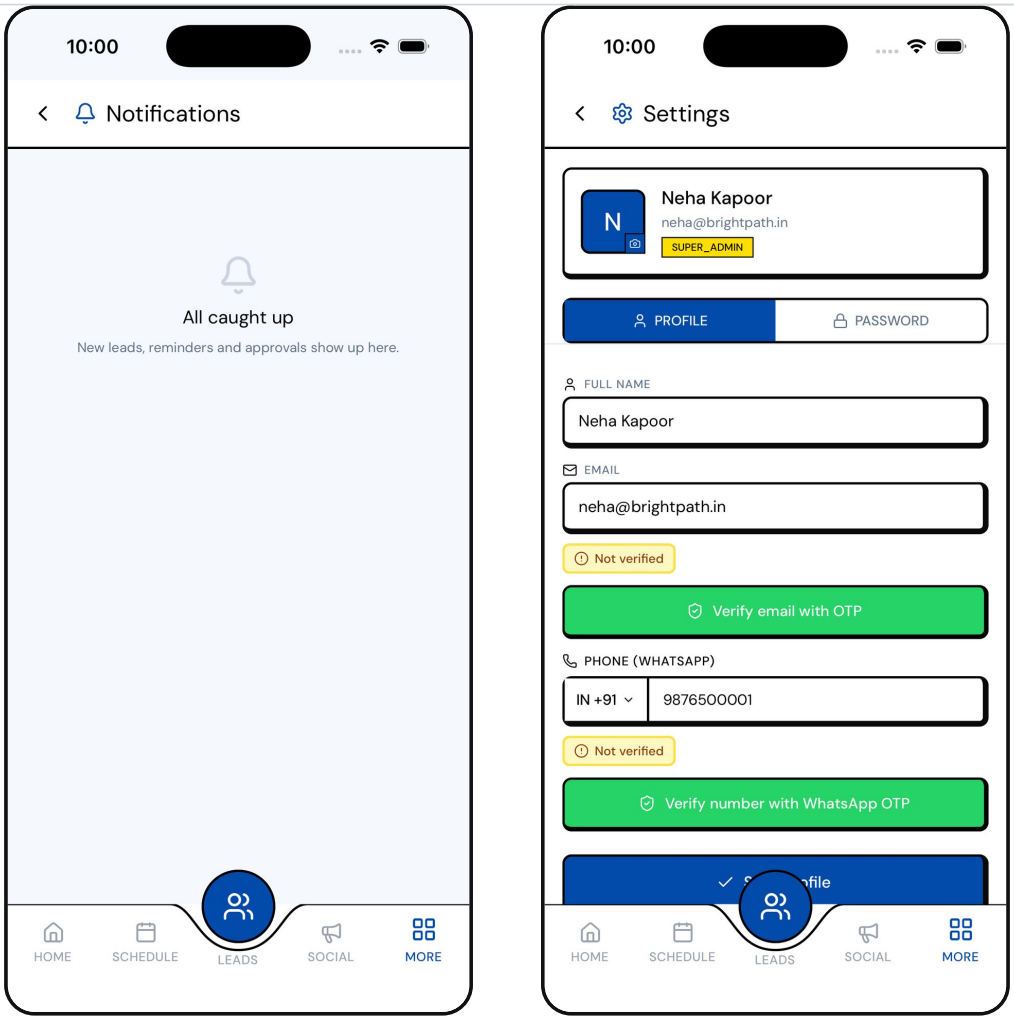


Figure 43. Notifications (left) and Settings (right).

Settings, profile and billing

More › Settings has two tabs: **Profile** (your name, email, WhatsApp number and verification) and **Password**. **More › Billing** shows your plan, this month's usage and invoice history. To renew or change a plan, contact your account manager or use the website (Chapter 17).

APPENDICES

First-time setup checklist

A

Do these in order so nothing needs redoing.

1. Create your account and choose a plan.
2. **Settings**: General Info, Bank Details, Terms, Numbering.
3. **Settings › Lead Statuses**: rename or add stages to match how you sell.
4. **Team**: add each salesperson with the right role; mark who receives auto-assigned leads.
5. **Products** and **Price Books**: add what you sell.
6. **Integrations**: connect IndiaMART, Facebook, Justdial and others; send a test lead.
7. **WhatsApp › Setup**: connect your number and create templates.
8. **Insights › Set targets & costs** and **Live Performance › Target**.
9. Ask everyone to open **Security** and add a passkey or authenticator app.

APPENDICES

Daily and weekly routine

B

When	Task
Every morning	Open the Dashboard. Clear **Overdue follow-ups**, then **Today's follow-ups**, then call **Uncontacted** leads.
After every call	Update the lead's stage, tag (Hot / Warm / Cold), remark and next follow-up date.
Daily (admin)	Check Live Performance; look at assigned vs worked.
Weekly	Review stuck leads and response speed in Insights; send campaign or funnel updates.
Monthly	Compare won value to target; export reports; review lost reasons; check AI Usage and Billing.

APPENDICES

Troubleshooting & FAQ

C

Problem	What to do
I cannot sign in.	Use **Forgot password?**. If two-step sign-in is on, check the time on your phone and use a backup code if needed. Ask an admin to check you are active in **Team**.
Leads from IndiaMART or Facebook stopped arriving.	Open **Integrations** and check the connection. Keys expire or are changed on the platform; reconnect and send a test.
A lead is not visible to me.	It may be assigned to someone else, or your role may not see that page. Ask an admin to check **Permissions**.
I deleted a lead by mistake.	Open **Trash** and restore it.
Who changed this lead?	Open the lead and read **Status history**, or search the **Activity Log**.
WhatsApp message will not send.	It is outside the 24-hour window. Use an approved template, or ask the customer to message first.
A quotation will not send.	If approval is on, an admin must approve it first.
I need more help.	Open **Support** and raise a ticket with the page name and what you expected.

APPENDICES

Glossary

D

Term	Meaning
Lead	One enquiry from a person or company.
Client	A lead that has been won.
Stage / status	Where a lead is in your sales process.
Hot / Warm / Cold	How likely the lead is to buy.
Follow-up	A date you promised to contact the lead again.
Kanban	A board with one column per stage.
Saved view	A named set of filters and columns.
Break-even	Won value needed to cover your fixed costs.
HSN / SAC	Tax classification code for goods or services.
Template (WhatsApp)	A pre-approved message you may send to start a conversation.
Webhook	A web address another service calls to send you data.
Passkey	Sign-in using your device's fingerprint, face or screen lock.



Thank you for using NestLeads

Need a hand? Open **Support** in the sidebar and raise a ticket.
Include the page name and what you expected to happen.