User Manual: Enquiry Panel

Build Wealth Sales Dashboard

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1. Introduction

The **Enquiry Panel** is the central hub of the Build Wealth ERP system. It allows agents and administrators to track real-time leads, manage client relationships, and move deals through the sales pipeline—from the initial "New Lead" stage to "Deal Closed."

2. Getting Started

2.1 Accessing the System

1. **Launch the App:** Open the application in your web browser.
2. **Login:**
   - **Google Workspace:** Click the "Google Workspace" button to sign in with your official company email.
   - **Manual Login:** Enter your corporate email and password, then click "Secure Login."

2.2 The Main Dashboard

Once logged in, you will see the **Enquiry Dashboard**. This view lists all leads assigned to you (or all leads if you are an Admin).

- **Desktop View:** Displays a detailed table with columns for Date, Client Details, Requirements, Status, and Next Action.
- **Mobile View:** Displays a card-based list optimized for phones, showing key details and quick-action buttons (Call, WhatsApp).

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3. Managing Enquiries

3.1 Filtering & Searching

Use the **Toolbar** at the top (or the "Tools" button on mobile) to find specific leads.

- **Global Search:** Type a client name, mobile number, or Lead ID into the search bar to find them instantly.
- **Date Range:** Select a "Start Date" and "End Date" to view leads generated within a specific period.
- **Filters:** Use the dropdown menus to filter by:

- o **Status:** (e.g., *New Lead, Visit Due, Negotiation*)
- o **City:** (e.g., *Siliguri, Jalpaiguri*)
- o **Source:** (e.g., *Facebook, Magicbricks, Website*)
- o **Category:** (e.g., *Residential, Commercial*)
- **Clear Filters:** Click the "X" button to reset all filters and view the full list.

3.2 Viewing Lead Details

Click on any row (Desktop) or card (Mobile) to open the **Detailed View**. This screen provides:

- **Client Profile:** Name, Company, Mobile Numbers, and Email.
- **Requirement Snapshot:** Budget, Location, Project Interest, and specific remarks.
- **Communication Hub:** Quick buttons to **Call** or **WhatsApp** the client directly.

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4. The Workflow System (Next Action)

The "Next Action" system is the brain of the ERP. It uses a logic-based algorithm to determine exactly where a lead stands in the sales cycle. Instead of guessing, simply follow the button displayed in the right-most column.

4.1 Standard Sales Cycle (The "Happy Path")

Most leads will follow this linear progression. The system checks the status of each step in order; if a step is "Pending," it becomes the active stage.

1. **Stage: New Lead**
   - o **Condition:** You have not yet logged a "Contact Client" outcome.
   - o **Your Action:** Click **"Contact"** to log the first call.
2. **Stage: Proposal Pending**
   - o **Condition:** Client contacted, but the proposal has not been sent.
   - o **Your Action:** Click **"Send Proposal"** to record that details were shared via WhatsApp/Email.
   - o *Note:* This stage also reactivates if a "Fresh Proposal" is requested later in the cycle.
3. **Stage: Proposal Confirmation by Client**
   - o **Condition:** Proposal sent, waiting for client acknowledgment.
   - o **Your Action:** Click **"Confirm"** to update if the client liked the options.
4. **Stage: Schedule Visit**
   - o **Condition:** Client showed interest; now a physical site visit needs to be booked.
   - o **Your Action:** Click **"Schedule"** to fix a Date and Time for the visit.
5. **Stage: Visit Due**
   - o **Condition:** The site visit is scheduled but the outcome (Visited/Cancelled) hasn't been logged yet.
   - o **Your Action:** Click **"Site Visit"** to record the result of the physical meeting.
6. **Stage: Needs Follow-up**
   - o **Condition:** Visit done, but the client hasn't given a clear "Yes" or "No" yet.
   - o **Your Action:** Click **"Follow Up"** to log your post-visit conversations.
7. **Stage: Deal Negotiation**

- o **Condition:** Client is interested and discussing price/terms.
- o **Your Action:** Click **"Negotiate"** to track offers and discounts.

4.2 The Closing Phase (Finalization)

Once a client agrees to buy, the workflow splits into two detailed sub-stages to ensure paperwork is handled correctly.

- **Sub-Stage A: Deal Finalization**
  - o **Condition:** Negotiation successful.
  - o **Button: "Finalize Deal"**
  - o **Task:** Collect basic booking details and KYC documents.
- **Sub-Stage B: Docs Verified**
  - o **Condition:** Documentation is marked as "Verified" or "Completed," but the Agreement is not yet signed.
  - o **Button: "Sign Agreement"**
  - o **Task:** Execute the final sale deed/agreement.

4.3 The Billing & Collection Phase

After the agreement is signed, the system enters the **Billing Mode**. This uses special logic to track payments.

- **Stage: Billing**
  - o **Standard:** Blue button labeled **"Billing"**. Use this to generate the invoice or submit the bill to the client.
- **Stage: Billing: Sent**
  - o **Condition:** You have marked "Bill Submit to Client" as "Yes."
  - o **Visual:** The status text updates to indicate the bill is with the client.
- **Stage: Billing: Follow-up (Urgent)**
  - o **Condition:** You have marked "Payment Follow-up" as "Yes."
  - o **Visual:** The button turns **Red** and pulses/animates to demand attention.
  - o **Your Action:** Click **"Billing"** immediately to record collection notes.

Completion: When "Payment Received" is marked as "Yes," the lead moves to **Deal Closed** (Green Checkmark) and no further actions are required.

4.4 Exception Handling (Re-Proposals)

Not every deal goes smoothly. The system handles "Not Interested" clients intelligently.

- **Stage: Re-Proposal**
  - o **Trigger:** If you mark the "Engagement Status" (Negotiation) as **"Not Interested"**.

- - **System Logic:** Instead of closing the lead as "Lost," the system redirects them to a strategy phase.
  - **Your Action:** Click **"Strategize"**. You can choose to:
    1. Drop the lead permanently.
    2. Request a **"Fresh Proposal"** (which loops the lead back to Stage 2: Proposal Pending).

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5. Smart Features

5.1 AI Smart Analysis

Feature: "Smart Analyst"

Inside the Lead Details view, click the "Run Smart Analysis" button (or the Brain icon).

- **What it does:** It uses Artificial Intelligence to analyze the lead's history, budget, and requirements.
- **Output:** It provides a probability score, potential blockers, and a **customized WhatsApp script** that you can copy and send to the client.

5.2 Exporting Data

To download a report:

1. Apply any desired filters (optional).

2. Click the **CSV Icon** (green file icon) in the toolbar.

3. A .csv file containing the currently visible leads will download to your device.

5.3 Manual Sync

The system syncs automatically every few seconds. However, if you know a colleague just updated a lead and you don't see it yet, click the **Refresh Icon** (circular arrows) in the top header to force an immediate update.

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6. Troubleshooting

- **"No Enquiries Found":** Check if you have active filters (Date, City, etc.) that are hiding your data. Click the "Clear" (X) button.
- **Login Issues:** If you cannot log in, ensure you are using your exact corporate email. If the issue persists, contact the Administrator to verify your access in the User Database.

- **Action Button Disabled:** If a button says "Completed" or is grayed out, it means the current stage is finished, or you are viewing a "Deal Closed" file.

End of Manual