



USER MANUAL

Sales Follow-up Automation

Track your leads, never miss a follow-up, and keep a full history of every conversation, from your desk or your phone.

Version **1.0.0**

For **salespeople** and **administrators**

CONTENTS

- 01** Welcome
- 02** Signing in
- 03** Your dashboard
- 04** Managing leads
- 05** The lead page
- 06** Scheduling follow-ups
- 07** Recording the outcome
- 08** Follow-up calendar
- 09** Follow-up history
- 10** Reminders & notifications
- 11** Lead statuses explained
- 12** Using it on your phone
- 13** For administrators
- 14** Tips & FAQ
- 15** Quick reference

1 Welcome

Sales Follow-up is a simple, focused tool for one job: making sure every potential customer gets followed up on time.

Instead of a complex CRM, it gives you exactly four things: a list of your leads, a schedule of what to do next, reminders before it's due, and a timeline of everything that was said. The whole routine looks like this:

1

Add the lead

Name, company, contact details and where they came from.

2

Schedule a follow-up

Call, Email or WhatsApp, with a date, time and priority.

3

Get reminded

An email before it's due; it's also on your dashboard.

4

Record the outcome

Notes, customer response, new status, and the next step.

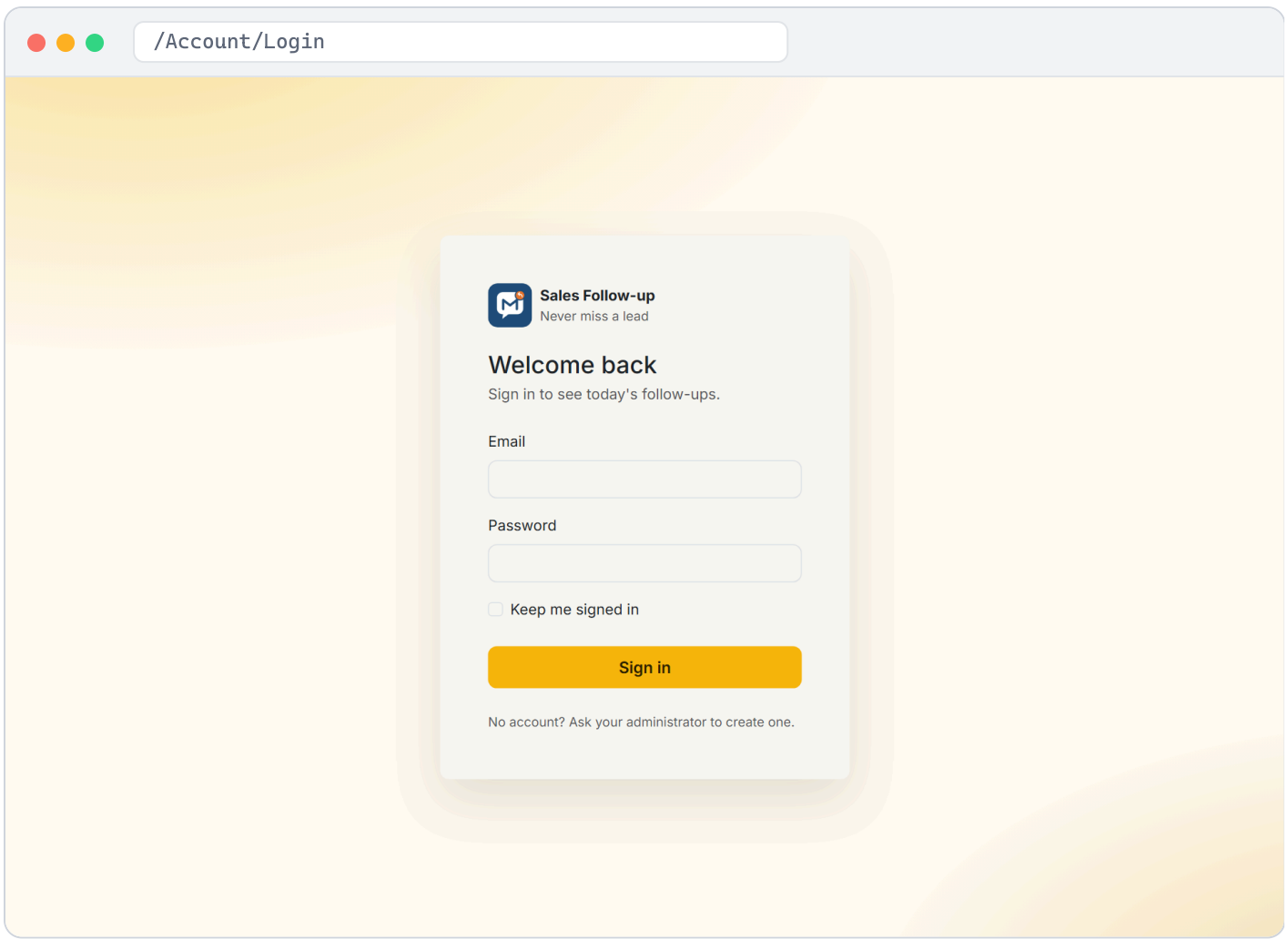
Then the cycle repeats until the lead is **Won** or **Lost**.

i

Who sees what: salespeople see only the leads assigned to them. Administrators see every lead and manage user accounts (see [section 13](#)).

2 Signing in

Open the web address your administrator gave you, for example `http://server:5000`.



The sign-in page

- 1 Enter your **email** and **password**.
- 2 Tick **Keep me signed in** on your own computer or phone so you don't have to sign in every day.
- 3 Click **Sign in**. You land on your dashboard.

Change your password

Click your initials (top-right) → **Change password**. Passwords need at least 8 characters with an upper-case letter, a lower-case letter and a digit.

Sign out

Click your initials (top-right) → **Sign out**. Always sign out on shared computers.

! After **5 wrong passwords** the account is locked for a few minutes. If you've forgotten your password, ask an administrator to set a new one.

3 Your dashboard

The dashboard is your to-do list for the day. Start every morning here.

Sales Follow-up
Never miss a lead

Dashboard

5 Log interaction + New lead RK

Good afternoon, Ravi
Saturday, 24 October 2026 · you have 4 follow-up(s) today and 3 overdue.

Summary Cards:

- 9 Active leads
- 4 Due today
- 3 Overdue
- 9 Completed this week
- 1 Won
- 1 Lost

Overdue follow-ups 3

- Aisha Khan** Crescent Retail Medium Overdue Done ...
Thu 22 Oct, 11:00 AM (2 d ago) · Email
Send intro deck and retail case study.
- Tom Fischer** Fischer Logistics High Overdue Done ...
Fri 23 Oct, 3:00 PM (21 h ago) · Call
Book the demo slot with Tom and his ops lead.
- Priya Nair** Brightwave Solutions High Overdue Done ...
Sat 24 Oct, 11:30 AM (49 min ago) · Call
Share pricing for 40 users and confirm decision date.

Today's follow-ups 4 + Schedule

- Priya Nair** Brightwave Solutions High Overdue Done ...
11:30 AM (49 min ago) · Call
Share pricing for 40 users and confirm decision date.
- Meera Iyer** Lotus Healthcare High Done ...
1:45 PM (in 1 h) · WhatsApp
Reply on the 15% discount request - approved up to 10%.
- Daniel Brooks** Northwind Traders Medium Done ...
3:45 PM (in 3 h) · Email
Check if finance has reviewed the proposal.
- Arjun Mehta** Zenith Pharma Low Done ...
5:45 PM (in 5 h) · Call
Schedule live demo of the reporting module.

Upcoming Open calendar →

- Chen Wei** Pacific Electronics Medium Done ...
Sun 25 Oct, 10:00 AM (in 21 h) · Email
First contact - send product overview.
- Grace Lee** Summit Education High Done ...
Mon 26 Oct, 11:30 AM (in 1 d) · Call
Walk Grace through the formal quote.

Lead pipeline

Progress bar: New 2, Interested 2, Negotiation 1, Lost 1, Contacted 2, Proposal Sent 2, Won 1

Recent activity View all →

- Meera Iyer** → Negotiation
23 Oct, 5:30 PM · 18 h ago
Call with Meera and IT head. Discussed data securit...
- Omar Haddad** → Contacted
23 Oct, 1:00 PM · 23 h ago
Intro via WhatsApp after LinkedIn reply.
- Daniel Brooks** → Proposal Sent
22 Oct, 12:15 PM · 2 d ago
Sent proposal v1 with annual pricing and a 10% early...
- Arjun Mehta** → Interested
22 Oct, 10:00 AM · 2 d ago
Sent reporting module brochure and sample dashbo...
- Priya Nair** → Interested
21 Oct, 3:00 PM · 2 d ago
Ran the online demo for Priya and two sales manage...
- Grace Lee** → Proposal Sent
21 Oct, 11:30 AM · 3 d ago
Requirements call for 25 seats across 2 campuses.

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Dashboard for a salesperson with 4 follow-ups today and 3 overdue

- 1 Summary cards:** active leads, follow-ups due today, overdue, completed this week, won and lost. Click a card to jump to the matching list.
- 2 Overdue follow-ups** are highlighted in red with an **Overdue** label, oldest first. Deal with these first.

- 3 **Today's follow-ups** lists everything scheduled for today. Click **✓ Done** to record what happened, or **...** to reschedule or cancel.
- 4 **Lead pipeline**: how many of your leads are at each stage. Below it, **Recent activity** shows the latest recorded conversations.
- 5 **Log interaction** and **+ New lead** are always available at the top of every page.
- 6 **Menu**: Dashboard, Leads, Follow-up Calendar, Follow-up History and Reminder Settings.

Further down, **Upcoming** shows the next follow-ups after today.

4 Managing leads

Open **Leads** in the menu to see, search and filter all of your leads.

Sales Follow-up
Never miss a lead

WORKSPACE

- Dashboard
- Leads**
- Follow-up Calendar
- Follow-up History

SETTINGS

- Reminder Settings

Leads

Log interaction + New lead RK

1 Search name, company, email or phone

2 All statuses Filter Reset

CUSTOMER	COMPANY	PHONE	SOURCE	STATUS	NEXT FOLLOW-UP		
Omar Haddad omar@desertrose.example	Desert Rose Hotels	+971 4 555 0177	Social Media	3 Contacted	27 Oct, 4:00 PM	👁	✎
Grace Lee grace.lee@summittedu.example	Summit Education	+1 415 555 0134	Referral	Proposal Sent	26 Oct, 11:30 AM	👁	✎
Chen Wei chen.wei@pacific.example	Pacific Electronics	+65 6123 4567	Event	New	25 Oct, 10:00 AM	👁	✎
Arjun Mehta arjun.mehta@zenithpharma.example	Zenith Pharma	+91 98111 22334	Website	Interested	24 Oct, 5:45 PM	👁	✎
Sofia Martins sofia.martins@atlas.example	Atlas Interiors	+351 21 555 0142	Advertisement	Lost	—	👁	✎
Liam O'Connor liam@greenfield.example	GreenField Agro	+353 1 555 0199	Referral	Won	—	👁	✎
Aisha Khan aisha.khan@crescent.example	Crescent Retail	+971 50 123 4567	Social Media	New	🕒 22 Oct, 11:00 AM	👁	✎
Tom Fischer tom@fischerlogistics.example	Fischer Logistics	+49 30 1234 5678	Cold Call	Contacted	🕒 23 Oct, 3:00 PM	👁	✎
Meera Iyer meera.iyer@lotushealth.example	Lotus Healthcare	+91 99000 45678	Event	Negotiation	24 Oct, 1:45 PM	👁	✎
Daniel Brooks d.brooks@northwind.example	Northwind Traders	+44 20 7946 0321	Website	Proposal Sent	24 Oct, 3:45 PM	👁	✎
Priya Nair priya.nair@brightwave.example	Brightwave Solutions	+91 98200 11234	Referral	Interested	🕒 24 Oct, 11:30 AM	👁	✎

11 record(s)

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The leads list

- 1 **Search** by name, company, email or phone number.
- 2 **Filter by status**, for example only **Negotiation**. Click **Filter**; **Reset** clears it.
- 3 The coloured **status** of each lead (see section 11).
- 4 The **next follow-up**. Red with an alarm icon means it's overdue; + **Schedule** means nothing is planned yet.

Add a new lead

The screenshot shows the 'New lead' form in the Sales Follow-up application. The interface includes a sidebar with navigation options like 'Dashboard', 'Leads', 'Follow-up Calendar', and 'Follow-up History'. The main form area is titled 'New lead' and contains several input fields: 'Customer name *', 'Company', 'Email', 'Phone number' (pre-filled with '+91 98765 43210'), 'Source' (a dropdown menu with 'Website' selected), and 'Status' (a dropdown menu with 'New' selected). There is also a 'Notes' text area with the placeholder text 'Background, requirements, budget...'. At the bottom of the form, there are two buttons: '✓ Save & schedule follow-up' and 'Cancel'. In the top right corner of the form area, there are three buttons: 'Log interaction', '+ New lead', and 'RK'.

- 1 Click **+ New lead** (top-right of any page).
- 2 Fill in the details. Only **Customer name** is required, but an email or phone number makes follow-ups much easier.
- 3 Choose the **Source** (Website, Referral, Cold Call, Social Media, Event, Advertisement or Other) and the starting **Status**, usually **New**.
- 4 Click **✓ Save & schedule follow-up**. You go straight to the scheduling page (section 6). Click **Skip for now** if you don't want to plan anything yet.

i Leads you create are **assigned to you automatically**. Only an administrator can move a lead to another salesperson.

Edit or delete a lead

Open the lead and click **Edit** to change its details. The **Delete** button deletes the lead **together with its whole follow-up history**. You are asked to confirm, and it can't be undone. For a lead that simply didn't buy, set the status to **Lost** instead so the history is kept.

5 The lead page

Click any lead's name to see everything about it in one place.

The screenshot displays the 'Sales Follow-up' application interface. On the left is a dark sidebar with navigation links: 'Sales Follow-up' (with a tagline 'Never miss a lead'), 'WORKSPACE' (containing 'Dashboard', 'Leads' (highlighted), 'Follow-up Calendar', and 'Follow-up History'), and 'SETTINGS' (containing 'Reminder Settings'). The main content area is titled 'Priya Nair' and includes a 'Log interaction' button, a '+ New lead' button, and a user avatar 'RK'. Below the title, there's a 'Leads' breadcrumb and a yellow 'Interested' status tag. A 'Schedule follow-up' button is also present. The contact card shows 'Priya Nair' from 'Brightwave Solutions', with email 'priya.nair@brightwave.example', phone '+91 98200 11234', source 'Referral', and assigned to 'Ravi Kumar'. It was added on '24 Oct 2026'. A note mentions 'Evaluating a CRM for a 40-person sales team. Budget approved for Q4.' An 'Update status' section shows the current status as 'Interested' with an 'Update' button. A note below states: 'To record what was discussed, use Log Interaction instead. It updates the status too.' The 'Scheduled follow-ups' section shows one upcoming call on 'Sat 24 Oct, 11:30 AM (49 min ago)' with a 'Done' button. The 'Follow-up timeline' shows two interactions: an email from 'Wed 21 Oct 2026, 3:00 PM' (status change from 'Contacted' to 'Interested') and a call from 'Sun 18 Oct 2026, 10:30 AM' (status change from 'New' to 'Contacted').

Lead page with one scheduled follow-up and two recorded interactions

- 1 The lead's current **status**.
- 2 **Schedule follow-up**, **Log interaction**, **Edit** and **Delete**.
- 3 **Contact card**. Click the email to write, click the phone number to call (on a phone), or click the green **WhatsApp** icon to open a WhatsApp chat.
- 4 **Update status**: a quick status change without notes.
- 5 **Scheduled follow-ups** for this lead, with **✓ Done** and **...** buttons.
- 6 The **follow-up timeline**: every recorded interaction, newest first, with the discussion notes, the customer's response (in the yellow quote), the status change and who recorded it.

6 Scheduling follow-ups

A follow-up is a planned next step: *call Priya on Monday at 10:00.*

Sales Follow-up
Never miss a lead

WORKSPACE

- Dashboard
- Leads
- Follow-up Calendar
- Follow-up History

SETTINGS

- Reminder Settings

Schedule follow-up

Log interaction + New lead RK

When should you follow up?

1 Lead *
Aisha Khan (Crescent Retail)

2 Follow-up date & time *
26-10-2026 10:00

3 Priority
Low Medium High

In 1 hour Next business day In 3 days
Next week

4 Method
Call Email WhatsApp

Agenda / notes
What do you want to cover?

✓ Schedule Skip for now

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- 1 **Lead:** already filled in when you start from a lead page.
- 2 **Date & time.** Use the shortcuts **In 1 hour** , **Next business day** (10:00, skipping weekends), **In 3 days** or **Next week** , or pick any date.
- 3 **Priority:** **Low** , **Medium** or **High** . High-priority items stand out on the calendar.
- 4 **Method:** Call, Email or WhatsApp. Add an **agenda** in the notes so you remember what to cover.

Click **✓ Schedule** . You can schedule from a lead page, from **+ Schedule** on the dashboard, or by clicking a day on the calendar.

Reschedule or cancel

Click **...** next to any follow-up → **Reschedule / edit** to change it, or **Cancel follow-up** if it's no longer needed. A rescheduled follow-up gets a **fresh reminder**.

7 Recording the outcome

This is the most important habit: after every conversation, record what happened and decide the next step.

Sales Follow-up
Never miss a lead

WORKSPACE

- Dashboard
- Leads
- Follow-up Calendar
- Follow-up History

SETTINGS

- Reminder Settings

Record outcome

Log interaction + New lead RK

1 **Call with Priya Nair (Brightwave Solutions)**
Scheduled Sat 24 Oct, 11:30 AM High Overdue
Share pricing for 40 users and confirm decision date.

2 **What happened?**

Lead
Priya Nair (Brightwave Solutions)

Interaction date & time 24-10-2026 12:19 Method Call Email WhatsApp

3 **Discussion notes ***
Key points discussed, objections, next steps...

Customer response
e.g. Wants a revised quote by Friday

4 **Update lead status to**
Interested

Schedule the next follow-up

Next follow-up date & time 26-10-2026 10:00 Next method Call Next priority High

Next follow-up notes
e.g. Send revised proposal, confirm budget

Save outcome Cancel

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Recording the outcome of a scheduled call

- 1 The **follow-up you're completing**: method, time, priority and agenda.
- 2 **Discussion notes** (required): key points, objections, what was agreed. Add the **customer response** underneath.
- 3 **Update lead status to**: move the lead forward, for example to **Proposal Sent**. For a brand-new lead, **Contacted** is pre-selected on its first conversation.
- 4 **Schedule the next follow-up** is switched on by default and suggests the next business day at 10:00. Adjust the date, method and priority, and add a note for next time.

Click **Save outcome**. The conversation appears in the lead's timeline and in Follow-up History, and the next follow-up is on your schedule.

Start from a scheduled follow-up

Click **✓ Done** on the dashboard, the lead page or the calendar, or the **Record outcome** button in a reminder email.

Conversation that wasn't scheduled

The customer called you? Use **Log interaction** (top bar or lead page), choose the lead and fill in the same form.



When you set the status to **Won** or **Lost**, the "next follow-up" switch turns off, and any other pending follow-ups for that lead are **cancelled automatically**.

Follow-up calendar

See your whole week or month at a glance. Open **Follow-up Calendar** in the menu.

 **Sales Follow-up**
Never miss a lead

WORKSPACE

Dashboard

Leads

Follow-up Calendar

Follow-up History

SETTINGS

Reminder Settings

Follow-up Calendar

Log interaction

+ New lead

RK

High priority

Medium

Low

Overdue

Completed

Click a day to schedule · click an event to record its outcome

<

>

Today

October 2026

Month

Week

Agenda

MON	TUE	WED	THU	FRI	SAT	SUN
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Month view; today is highlighted

COLOUR	MEANING
High	High-priority follow-up
Medium	Medium priority
Low	Low priority
Overdue	Its time has passed and no outcome has been recorded
Completed	Outcome already recorded

- Switch between **Month**, **Week** and **Agenda** (a simple list) at the top-right. Use the arrows to move between periods and **Today** to come back.
- **Click a day** to schedule a new follow-up on that date.

- **Click a follow-up** to record its outcome. Completed items open the lead page instead. Hover over an item to see its method, priority and notes.

9 Follow-up history

Every recorded conversation across all your leads, newest first. Open **Follow-up History**.

 **Sales Follow-up**
Never miss a lead

WORKSPACE

Dashboard

Leads

Follow-up Calendar

Follow-up History

SETTINGS

Reminder Settings

/History

Follow-up History

Log interaction

+ New lead

RK

1

Search icon

All leads

Any method

dd-mm-yyyy

dd-mm-yyyy

Filter

Reset

WHEN	LEAD	METHOD	DISCUSSION & RESPONSE	OUTCOME	BY
23 Oct 2026 5:30 PM	Meera Iyer Lotus Healthcare	Call	Call with Meera and IT head. Discussed data security and rollout across 3 clinics. 🗨️ Asked for 15% discount for a 2-year term.	Interested → Negotiation	Ravi Kumar
23 Oct 2026 1:00 PM	Omar Haddad Desert Rose Hotels	WhatsApp	Intro via WhatsApp after LinkedIn reply. 🗨️ Busy this week; prefers a call next week.	New → Contacted	Ravi Kumar
22 Oct 2026 12:15 PM	Daniel Brooks Northwind Traders	Email	Sent proposal v1 with annual pricing and a 10% early-sign discount. 🗨️ Received, reviewing with finance.	Interested → Proposal Sent	Ravi Kumar
22 Oct 2026 10:00 AM	Arjun Mehta Zenith Pharma	Email	Sent reporting module brochure and sample dashboards. 🗨️ Wants to see it live.	New → Interested	Ravi Kumar
21 Oct 2026 3:00 PM	Priya Nair Brightwave Solutions	Email	Ran the online demo for Priya and two sales managers. Shared the onboarding plan. 🗨️ Very positive - wants pricing for 40 users.	Contacted → Interested	Ravi Kumar
21 Oct 2026 11:30 AM	Grace Lee Summit Education	Call	Requirements call for 25 seats across 2 campuses. 🗨️ Send formal quote.	New → Proposal Sent	Ravi Kumar
20 Oct 2026 4:00 PM	Meera Iyer Lotus Healthcare	WhatsApp	Followed up after the expo. Shared case study from another clinic group. 🗨️ Interested, asked for a call with her IT head.	New → Interested	Ravi Kumar
20 Oct 2026 10:00 AM	Liam O'Connor GreenField Agro	Email	Contract signed and returned. Onboarding booked. 🗨️ Signed!	Negotiation → Won	Ravi Kumar
19 Oct 2026 11:00 AM	Daniel Brooks Northwind Traders	Call	Discovery call. Needs multi-currency invoices and annual billing. 🗨️ Will compare with their current vendor.	New → Interested	Ravi Kumar
18 Oct 2026 10:30 AM	Priya Nair Brightwave Solutions	Call	Intro call. Walked through lead tracking and reminders. Team of 40 currently uses spreadsheets. 🗨️ Asked for a product demo with her sales managers.	New → Contacted	Ravi Kumar
17 Oct 2026 9:45 AM	Tom Fischer Fischer Logistics	Call	Cold call. Tom manages 12 dispatch staff; open to a short demo. 🗨️ Call back next week.	New → Contacted	Ravi Kumar
16 Oct 2026	Sofia		Pricing discussion. Budget lower than our entry plan.		Ravi Kumar

1 **Search** inside the notes and customer responses as well as lead names. Try "discount" or "proposal".

2 Narrow down by **lead**, **method** and a **date range** (from/to).

3 **Outcome**: the status change that conversation caused.



The **Completed this week** card on the dashboard opens this page already filtered to the current week, which is handy for weekly reports.

10 Reminders & notifications

Choose how and when you're reminded. Open **Reminder Settings**.

Sales Follow-up
Never miss a lead

WORKSPACE

- Dashboard
- Leads
- Follow-up Calendar
- Follow-up History

SETTINGS

- Reminder Settings**

Reminder Settings

Log interaction + New lead RK

Email delivery isn't configured yet. Reminders still show on the dashboard, but emails will fail until an administrator fills in the `smtp` section of `appsettings.json` (host, port, username, password, from-address) and restarts the app.

My notification preferences

Emails go to ravi.kumar@brightsales.example.

1 ☒ Send email reminders before each follow-up

Remind me this many minutes before

30 minutes

2 ☒ Send a daily digest of today's and overdue follow-ups

Send the digest at

8:00 AM

3 ☒ Save preferences

3

ⓘ The reminder service checks every minute. Each follow-up gets one reminder email; if you reschedule it, a fresh reminder is sent. Follow-ups missed by more than an hour appear in the daily digest instead.

Delivery log

SENT	TYPE	SUBJECT	RESULT
24 Oct, 10:54 AM	Follow-up Reminder	Reminder: Call Priya Nair at 11:24 AM	Sent
24 Oct, 8:00 AM	Daily Digest	Your follow-ups: 4 today, 2 overdue	Sent
23 Oct, 5:00 PM	Follow-up Reminder	Reminder: WhatsApp Meera Iyer at 5:30 PM	Sent
23 Oct, 2:30 PM	Follow-up Reminder	Reminder: Call Tom Fischer at 3:00 PM	Sent
18 Oct, 12:09 PM	Test Email	Sales Follow-up: test email	Sent

5 record(s)

1 **Email reminders:** one email before each follow-up. Choose how early: 5, 15 or 30 minutes, 1, 2 or 4 hours, or 1 day before.

2 **Daily digest:** one morning email listing today's follow-ups and anything overdue. Pick the hour it arrives.

3 checks that emails reach your inbox.

4 The **Delivery log** shows every email the system tried to send you, and whether it was **Sent** or **Failed** (with the reason).

GOOD TO KNOW

One reminder per follow-up	You get one reminder email per follow-up. If you reschedule it, a new reminder is sent for the new time.
Missed by over an hour	No late reminder is sent; the follow-up shows as overdue on the dashboard and in the next daily digest instead.
Inside the email	Lead name, company, time, method, phone, email and your agenda, plus a Record outcome button that opens the form directly.
No emails arriving?	Check your spam folder, then the delivery log. If it says "Failed", tell your administrator. The dashboard always works regardless of email.

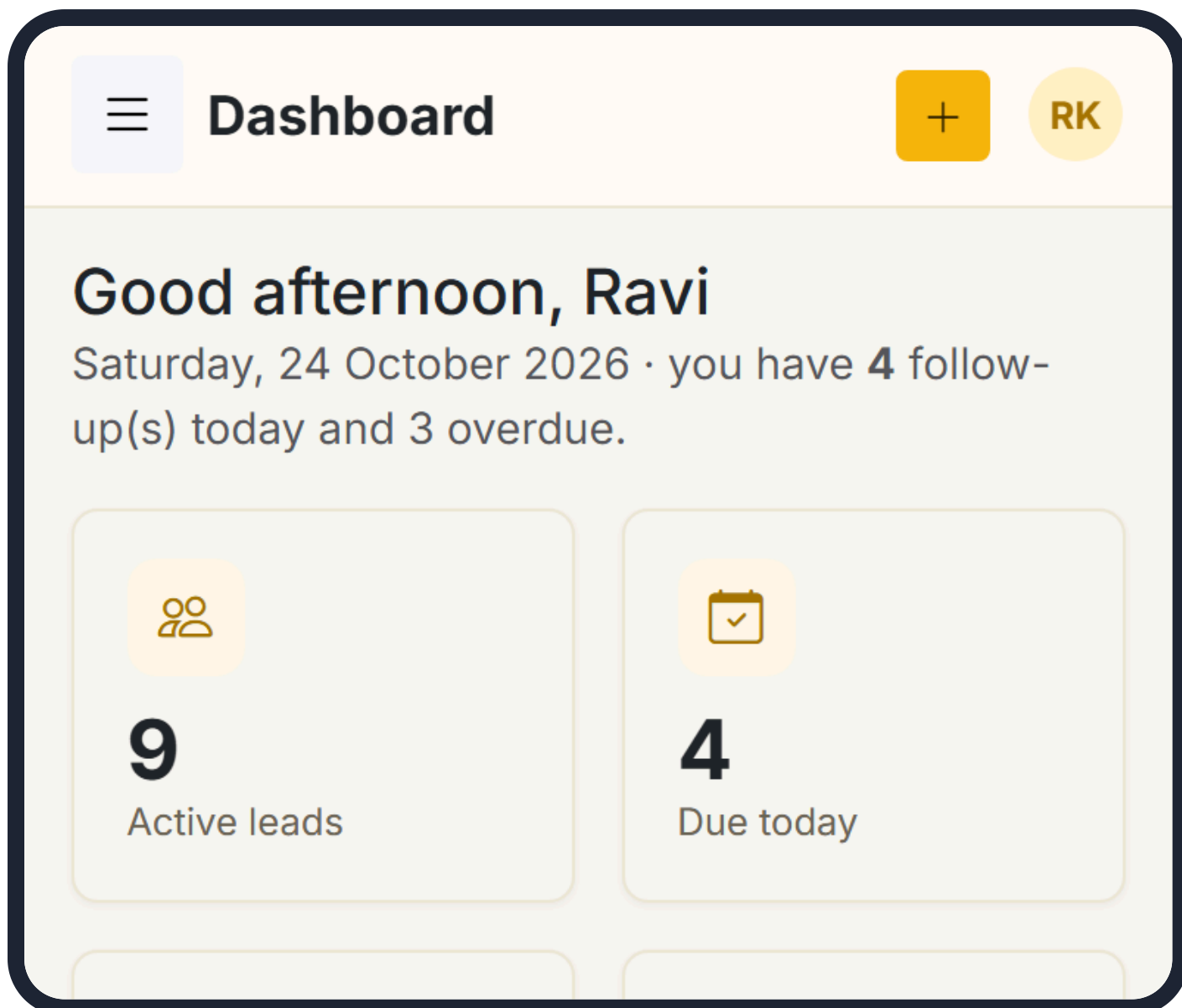
11 Lead statuses explained

Use statuses consistently so the pipeline on the dashboard means the same thing for everyone.

STATUS	USE IT WHEN...
New	The lead has just been added and nobody has spoken to them yet.
Contacted	You've had a first conversation or sent a first message.
Interested	They've shown real interest: asked for a demo, pricing or more details.
Proposal Sent	A quote or proposal is with the customer.
Negotiation	You're discussing price, terms or contract details.
Won	The customer has signed or paid. Closed: no more follow-ups.
Lost	They've chosen not to buy. Closed: the history is kept for later.

Active leads on the dashboard counts every lead that isn't Won or Lost.

12 Using it on your phone



The app works in any phone browser; nothing to install.

- Tap  (top-left) to open the menu.
- Tap  to add a lead, for example straight after meeting someone at an event.
- On a lead page, tap the **phone number** to call or the **WhatsApp** icon to message. Then tap  to record the outcome while it's fresh.
- Save it to your home screen: in the browser menu choose **Add to Home Screen**. It appears with the Sales Follow-up icon.

 Your phone must be able to reach the server, either on the office Wi-Fi or over a VPN, depending on how your company has set it up.

13 For administrators

Administrators have an extra **Users** menu item and can see and assign every lead.

Manage users

The screenshot shows the 'Users' management page in the 'Sales Follow-up' application. The left sidebar contains a 'Workspace' section with 'Dashboard', 'Leads', 'Follow-up Calendar', and 'Follow-up History', and a 'Settings' section with 'Reminder Settings' and 'Users' (highlighted). The main content area is titled 'Users' and features a table with columns: NAME, EMAIL, PHONE, ROLE, LEADS, and STATUS. The table lists three users: Alex Morgan (Admin, 0 leads), Emma Wilson (Salesperson, 1 lead), and Ravi Kumar (Salesperson, 11 leads). Each user has an edit icon. Above the table are buttons for 'Log interaction', 'New lead', and 'AM'. A '+ Add user' button is in the top right. The footer shows '© 2026 Sales Follow-up'.

NAME	EMAIL	PHONE	ROLE	LEADS	STATUS
Alex Morgan	alex.morgan@brightsales.example		Admin	0	Active
Emma Wilson	emma.wilson@brightsales.example	+91 98450 15267	Salesperson	1	Active
Ravi Kumar	ravi.kumar@brightsales.example	+91 98450 18323	Salesperson	11	Active

Add a salesperson

- 1 Users → **Add user**
- 2 Enter name, email and phone; choose role **Salesperson** (or **Admin**).
- 3 Set a starting password and share it with them privately. They can change it after signing in.

Edit, reset or deactivate

Click  next to a user to change details or role, type a **New password** to reset a forgotten one, or switch off **Active** when someone leaves. Inactive users can't sign in, but their leads and history stay.

/Users/Create

Sales Follow-up

Never miss a lead

WORKSPACE

Dashboard

Leads

Follow-up Calendar

Follow-up History

SETTINGS

Reminder Settings

Users

Add user

Log interaction

New lead

AM

Full name

Email

Phone

Role

Salesperson

Password

Active (can sign in and receive leads)

Minimum 8 characters with upper, lower case and a digit.

Save

Cancel

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Assign and reassign leads

Sales Follow-up

Never miss a lead

WORKSPACE

Dashboard

Leads

Follow-up Calendar

Follow-up History

SETTINGS

Reminder Settings

Users

© 2026 Sales Follow-up

Leads

Log interaction

New lead

AM

Search name, company, email or phone

All statuses

1

Ravi Kumar

Filter

Reset

CUSTOMER	COMPANY	PHONE	SOURCE	STATUS	ASSIGNED TO	NEXT FOLLOW-UP
Omar Haddad omar@desertrose.example	Desert Rose Hotels	+971 4 555 0177	Social Media	Contacted	Ravi Kumar	27 Oct, 4:00 PM
Grace Lee grace.lee@summittedu.example	Summit Education	+1 415 555 0134	Referral	Proposal Sent	Ravi Kumar	26 Oct, 11:30 AM
Chen Wei chen.wei@pacific.example	Pacific Electronics	+65 6123 4567	Event	New	Ravi Kumar	25 Oct, 10:00 AM
Arjun Mehta arjun.mehta@zenithpharma.example	Zenith Pharma	+91 98111 22334	Website	Interested	Ravi Kumar	24 Oct, 5:45 PM
Sofia Martins sofia.martins@atlas.example	Atlas Interiors	+351 21 555 0142	Advertisement	Lost	Ravi Kumar	—
Liam O'Connor liam@greenfield.example	GreenField Agro	+353 1 555 0199	Referral	Won	Ravi Kumar	—
Aisha Khan aisha.khan@crescent.example	Crescent Retail	+971 50 123 4567	Social Media	New	Ravi Kumar	🕒 22 Oct, 11:00 AM
Tom Fischer tom@fischerlogistics.example	Fischer Logistics	+49 30 1234 5678	Cold Call	Contacted	Ravi Kumar	🕒 23 Oct, 3:00 PM
Meera Iyer meera.iyer@lotushealth.example	Lotus Healthcare	+91 99000 45678	Event	Negotiation	Ravi Kumar	24 Oct, 1:45 PM
Daniel Brooks d.brooks@northwind.example	Northwind Traders	+44 20 7946 0321	Website	Proposal Sent	Ravi Kumar	24 Oct, 3:45 PM
Priya Nair priya.nair@brightwave.example	Brightwave Solutions	+91 98200 11234	Referral	Interested	Ravi Kumar	🕒 24 Oct, 11:30 AM

11 record(s)

Administrators see an extra "Assigned to" column and salesperson filter

1 Filter the leads list by **salesperson**. The number in the **Leads** column on the Users page opens the same view.

To give a lead to someone else, open it → **Edit** → choose the **Assigned salesperson** → **Save changes**. Their reminders follow the lead automatically. When a salesperson leaves, reassign their leads before deactivating them.

Reminder administration

- Reminder Settings → All users shows the delivery log for everyone, which helps spot email problems.
- Run reminder check now sends any due reminders immediately instead of waiting for the next one-minute check.
- Mail server settings are part of the installation (see the *Installation Guide*).

14 Tips & FAQ

Q What's the difference between "Update status" and "Log interaction"?

Update status only changes the label. **Log interaction** records what was discussed, the customer's response and the new status together, and can schedule the next step. Prefer Log interaction so the timeline tells the full story.

Q A follow-up is overdue but I already spoke to the customer.

Click **✓ Done** on it and record the outcome. Set the interaction date to when you actually spoke.

Q I can't find a lead a colleague mentioned.

You only see leads assigned to you. Ask an administrator to reassign it if you're taking it over.

Q Can I schedule more than one follow-up for the same lead?

Yes, for example a call tomorrow and a contract review next week. They all appear on the lead page and calendar.

Q Why did the other follow-ups for a lead disappear?

The lead was marked Won or Lost, so its remaining follow-ups were cancelled automatically.

Q Daily habit that works

Morning: clear the red **Overdue** list, then work through **Today**. After each conversation: **✓ Done** → notes → next step.
Never leave an active lead without a scheduled follow-up.

15 Quick reference

Keep this page next to your desk.

I WANT TO...	DO THIS
See what to do today	Dashboard: Overdue first, then Today's follow-ups
Add a new prospect	+ New lead → fill in → Save & schedule follow-up
Plan the next contact	Lead page → Schedule follow-up , or click a day in the calendar
Record a conversation I planned	✓ Done on the follow-up → notes → status → next step → Save outcome
Record an unplanned conversation	Log interaction → choose lead → same form
Move a follow-up to another day	... → Reschedule / edit
Drop a follow-up	... → Cancel follow-up
Find something a customer said	Follow-up History → search
Close a deal	Record the outcome with status Won
Call or WhatsApp a lead	Lead page → tap the phone number or WhatsApp icon
Change how I'm reminded	Reminder Settings → save → Send me a test email
Change my password	Your initials (top-right) → Change password

1

Add

+ New lead

2

Schedule

date · method · priority

3

Get reminded

email + dashboard

4

Record & repeat

✓ Done → next step

