

AJEETS · SALES APP COACHING GUIDE

tracker.ajeets.com/sales · Guide v2.2 · matches app build SALES v2.2 · 06-08-2026

The one law: if a lead is not in the Sales app, it does not exist. This guide is everything a new BD person needs. It is reissued with every app update; the version above always matches the build shown in the app footer.

1. Signing in

1. Open tracker.ajeets.com/sales in Chrome (phone or laptop).
2. Sign in with your AJEETS email and password. Mumbai and Bhubaneswar see the same live book.
3. If sign-in fails, message the COO. Do not share logins.

2. How a lead enters - four doors

- MAIL: enquiries to info@ and business@ become leads automatically. Check the book before assuming a mail was missed.
- PASTE: forwarded mail or WhatsApp screenshot into the purple "Paste mail / screenshot" button. The AI reads client, positions and contact. You approve; it saves.
- EXCEL: any lead list through "Import Excel". Same company on the same date is skipped, so re-imports are safe.
- MANUAL: "+ Manual lead" for calls, references, exhibitions. Thirty seconds, never postponed.

3. The five fields you own on every lead

1. OWNER - your name from the dropdown. Pressing the mail or call button on an unowned lead claims it for you automatically. No lead stays unowned past its first day.
2. STATUS - moved the day it changes: NEW, QUALIFIED, PROPOSAL SENT, NEGOTIATION, then WON or LOST.
3. AGREEMENT - the second dropdown: NONE, DRAFTING, SENT, SIGNED. Management reads this for the whole book at once.
4. NEXT ACTION + FOLLOW-UP DATE - what happens next, and when. Forget the date and the system quietly sets one; nothing is allowed to sleep undated.
5. NOTES - one line after every touch: date, what was said, what was promised. Your notes are the company memory when you are on leave.

4. The scoreboard - read it every morning

The navy band at the top is the funnel, live: LEADS · IN PLAY · WON · LOST · CONVERSION · CLOSE RATE. Beside it, the red numbers:

- OVERDUE - the follow-up date has passed. These leads are dying today.
- DUE TODAY - promised for today.
- GOING COLD - untouched for 7 or more days.
- UNOWNED - nobody has claimed it.

Tap any red number and the exact leads appear, worst first. The morning ritual is three words: zeros on the reds.

5. Two rules with teeth

- LOST needs a reason. The app refuses to close a lead without one. We always know why we lost.
- WON creates the business. Mark WON and the app asks position, heads and country - then creates the client in Mobilisation and places the requirement on the sourcing sheet. Your win walks itself into operations.

6. What you never do

- Never keep a parallel Excel or notebook list. One book only.
- Never forward enquiries to the COO mailbox expecting them to be tracked - that mailbox is private and disconnected. Put it in the app.
- Never invent an entry. Unknown detail? Write UNKNOWN in notes and flag it. An honest gap beats an invented fact.

7. If something looks wrong

The app repairs itself silently - sync, dates, duplicates. You will never be asked to fix machinery. If an error message ever appears, screenshot the exact words and send them to the COO. Never retype an error from memory; the exact words are the cure.