

STOCK2TRACK

Customers & CRM

User manual and guide — customers, leads and follow-ups, staff tasks, appointments, and footfall counting

START HERE

Before you begin

This guide covers the customer side of the shop: the customer list, enquiries that are not yet sales (leads), staff tasks, appointments, and counting the people who walk in.

1. In **Admin > Module Setup**, switch on what you use: **CRM, Tasks, Appointments, Footfall**.
2. Give staff the permissions in the table at the end of this guide.

The daily routine

1. Missed follow-ups first, then today's leads (Chapters 2 and 4).
2. The task board (Chapter 5).
3. Footfall and conversion at closing (Chapter 7).

Chapters

- | | |
|-----------------------|----------------------------|
| 1. Customers | 5. Staff Tasks |
| 2. Working Your Leads | 6. Appointments |
| 3. Adding a Lead | 7. Footfall and Conversion |
| 4. Missed Follow-ups | |

Customers

Every customer with their phone, email, locality, state and GSTIN.

Who	Counter staff	How often	Daily
-----	---------------	-----------	-------

Why it matters

The phone number finds the customer at the counter. The state and GSTIN decide the GST on their bills.

How to use it

1. Open **Customers > Customer**. Search by name, mobile or email.
2. Press **Add Customer**. Type at least the **First Name** and **Phone**; add the email, GSTIN, locality, address, **State**, date of birth and group. Press **Save Customer**.
3. Press the pencil on a row to edit, or the receipt icon to see what the customer owes.
4. Switch on **Converted Leads** to see customers who came from your leads.

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CLASSIC BLUE

QUICK INVOICE

NEW INVOICE

Customers

1 Search by name, mobile or email

Customer GroupAll Groups

Converted Leads

2 ADD CUSTOMER

4 Actions	Name	3 Mobile	Email	Locality	State	GSTIN
 	Aarav Joshi	9000100075		Ameerpet	Telangana	
 	Aarav Rao	9000100077		Nizampet	Telangana	
 	Aditi Yadav	9000100111		Madhapur	Telangana	
 	Aditi Das	9000100114		Ameerpet	Telangana	
 	Aditi Shaik	9000100136		Nizampet	Telangana	
 	Aditi Chowdary	9000100148		Moosapet	Telangana	
 	Aditi Prasad	9000100159		KPHB	Telangana	
 	Akhil Sharma	9000100166		Ameerpet	Telangana	
 	Akhil Goud	9000100096		Madhapur	Telangana	
 	Akhil Patel	9000100078		Madhapur	Telangana	
 	Akhil Kumar	9000100025		Erragadda	Telangana	
 	Amala Iyer	9000100051		KPHB	Telangana	
 	Amala Das	9000100095		Banjara Hills	Telangana	
 	Anand Patel	9000100069		Banjara Hills	Telangana	
 	Anitha Patel	9000100084		Miyapur	Telangana	
 	Anitha Das	9000100043		Moosapet	Telangana	

Figure 1. The customer list

- 1 Search

2 Add a customer
- 3 Mobile: how the counter finds them

4 Edit, or see what they owe

Before you start

Privilege **View Customer** or **Customer Creation**; editing needs **Update Customer**.

Good to know

- One phone number belongs to one customer; a duplicate is refused.
- A customer who has bills cannot be deleted.

Working Your Leads

People who enquired but have not bought yet, with the date you promised to call back.

Who	Sales staff	How often	Every day
-----	-------------	-----------	-----------

Why it matters

Most enquiries are lost because nobody calls back. The lead list shows today's follow-ups and how long each has been waiting.

How to use it

1. Open **CRM > Leads**. It shows the leads due today; widen **From** and **To**, or search, to see others. The pills at the top count leads by status.
2. Each card shows the name, the AI score, how long since the last comment (orange after 24 hours, red after 48), the phone with call, WhatsApp and SMS buttons, the owner and the last comment.
3. After speaking to the customer, tap the status chip on the card. Choose the new **Status**, the **Next Follow-up** date, type what was said in **Add Comment**, and press **Save**.
4. Setting the status to **Installed** turns the lead into a customer.

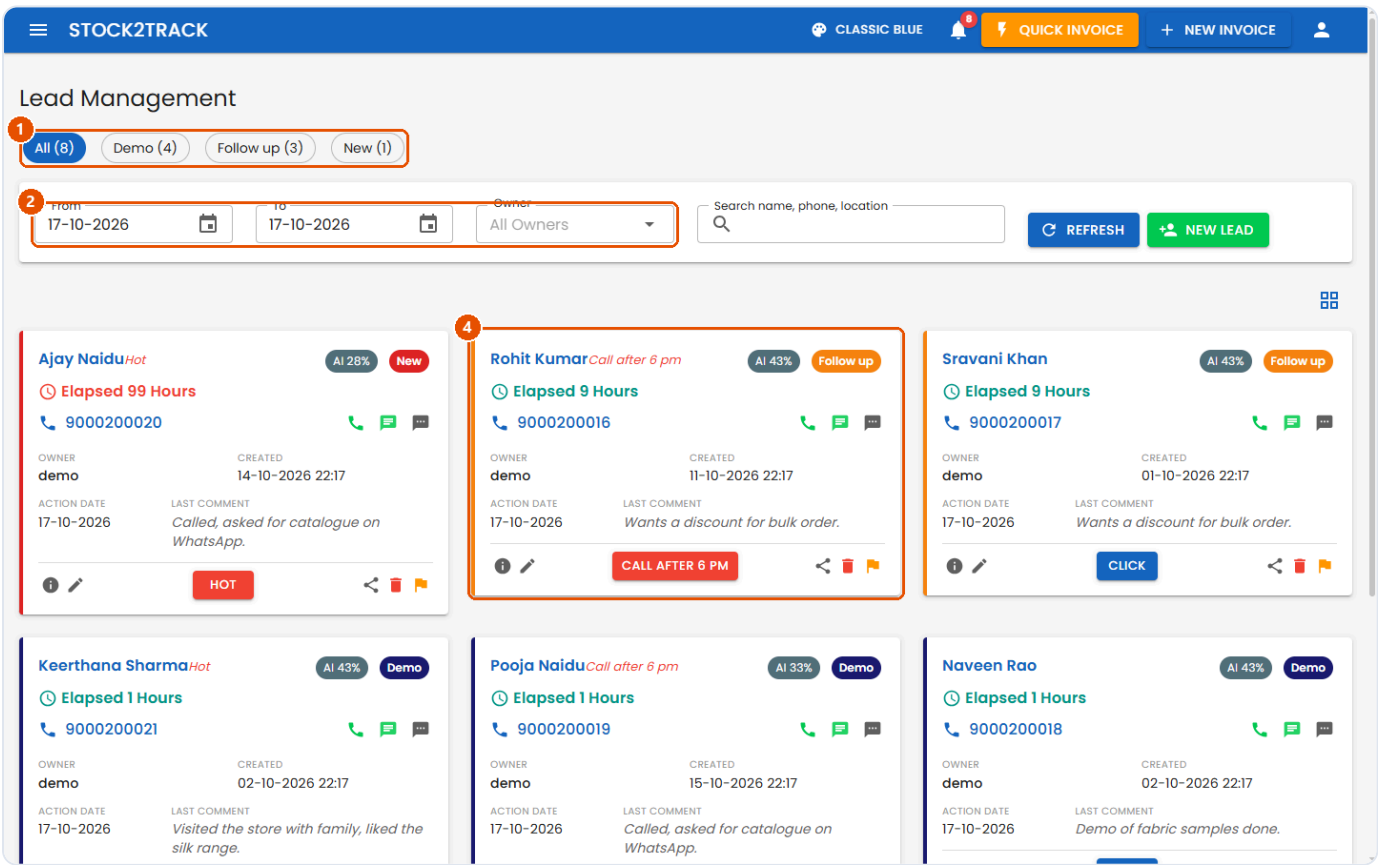


Figure 2. The lead cards

- 1

Leads by status
- 2

Follow-up dates and owner
- 3

Add a lead
- 4

A lead: score, time waiting, phone, owner, last comment

STOCK2TRACK CLASSIC BLUE QUICK INVOICE NEW INVOICE

Lead Management

All (8) Demo (4) Follow up (3) New (1)

From 17-10-2026

Update Status — Rohit Kumar

1 Status: Demo

2 Next follow-up: 18-10-2026

3 Add Comment: Demo booked at 11 am. Bring the fabric samples.

4 Comment History

- demo Will confirm after Dasara. 14-Oct-26 10:17 PM
- demo Wants a discount for bulk order. 16-Oct-26 04:17 PM

CANCEL SAVE

Figure 3. Logging a follow-up

- | | |
|---------------------|--------------------|
| 1 New status | 3 What was said |
| 2 When to call next | 4 Earlier comments |

Before you start

Privilege **Lead View**. Without **Lead All Owners**, each person sees only their own leads. The **CRM** module must be on.

Good to know

- Every comment is kept with the person and the time, so a lead can be handed to someone else with its history.

Adding a Lead

The enquirer's name and phone, where they came from, who owns the lead, and when to follow up.

Who	Sales staff	How often	With every enquiry
-----	-------------	-----------	--------------------

Why it matters

A lead written down at the counter is a sale that can still happen next week.

How to use it

1. Open **CRM > New Lead**. Type the **Customer Name** and **Phone**, and the location.
2. Choose the **Status** (New), the **Owner** who will follow up, the **Channel** they came from (walk-in, Instagram, referral), and the **Next Follow-up** date.
3. Add a short **Highlight** and the **Overall Remarks**: what they want and their budget.
4. Press **Create Lead**. The lead opens for comments and milestones. **Convert to Customer** makes it a customer when they buy.

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QUICK INVOICE

NEW INVOICE

New Lead

1

Customer name

Anitha Reddy

Phone

9848012345

Alt Phone

Email

Location

Kondapur

State

-- Select State --

3

Status

New

Owner

demo

Channel

Instagram

Next Follow-up

18-10-2026

Search Tag

Highlight / Notes

Bridal saree

4

Overall remarks

Saw our reel on Instagram. Wants bridal sarees for a December wedding.

5

CREATE LEAD

CANCEL

Figure 4. A new lead

1

Name and phone

2

Status and owner

3

Where they came from, and the follow-up date

4

What they want

5

Create the lead

Before you start

Privilege **Lead Creation**.

Good to know

- A phone number already on a lead is refused; find that lead instead.

Missed Follow-ups

Open leads whose follow-up date has passed, and how many days late each is.

Who	Sales manager	How often	Every morning
-----	---------------	-----------	---------------

Why it matters

A late follow-up is a customer drifting to a competitor. This list is the manager's morning call sheet.

How to use it

1. Open **CRM > Missed Updates**. Each lead shows its owner, status, the date it was due and the days overdue.
2. Call the customer (phone icon) or open the lead (pencil) and log the follow-up.
3. **CRM > Converted Leads** lists the leads that became customers in a period, with who converted them and how many days it took.

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QUICK INVOICE

NEW INVOICE

Missed Follow-ups

Leads with overdue follow-up dates that need attention.

1

6overdue lead(s)

2

REFRESH

MOVE ALL FORWARD

4

Actions	Name	Phone	Owner	Status	Was Due On	3	Days Overdue
 	Vamsi Goud	9000200024	demo	Follow up	09-Oct-26		8 day(s)
 	Anusha Goud	9000200027	demo	Follow up	09-Oct-26		8 day(s)
 	Nandini Varma	9000200025	demo	Follow up	11-Oct-26		6 day(s)
 	Tarun Khan	9000200026	demo	Follow up	11-Oct-26		6 day(s)
 	Sowmya Varma	9000200023	demo	Follow up	13-Oct-26		4 day(s)
 	Bharath Sharma	9000200022	demo	Follow up	15-Oct-26		2 day(s)

Figure 5. Missed follow-ups

- 1

How many are overdue
- 2

Move all to today (every owner)
- 3

Days late
- 4

Open or call

Before you start

Good to know

- **Move All Forward** moves every overdue lead, of every owner, to today, without asking. Use it only when you mean all of them.

Staff Tasks

Jobs for staff with an owner, a priority and a due date: price tags, window display, a call to a customer.

Who	Owner, manager	How often	Daily
-----	----------------	-----------	-------

Why it matters

A task written down with a name and a date gets done. "I thought someone else was doing it" goes away.

How to use it

1. Open **Tasks > Task Board**. Tasks are shown in columns: To Do, In Progress, Review and Done. **List** shows them as a table.
2. Press **New Task**. Type the **Title** and **Description**, choose **Assigned To**, the **Priority** and **Due Date**, and optionally link it to a job card, lead or invoice. Press **Save**.
3. Open a task to change its status, edit it, and add comments.
4. **Tasks > Task Dashboard** shows the totals, your own tasks, overdue tasks, and the work of each person.

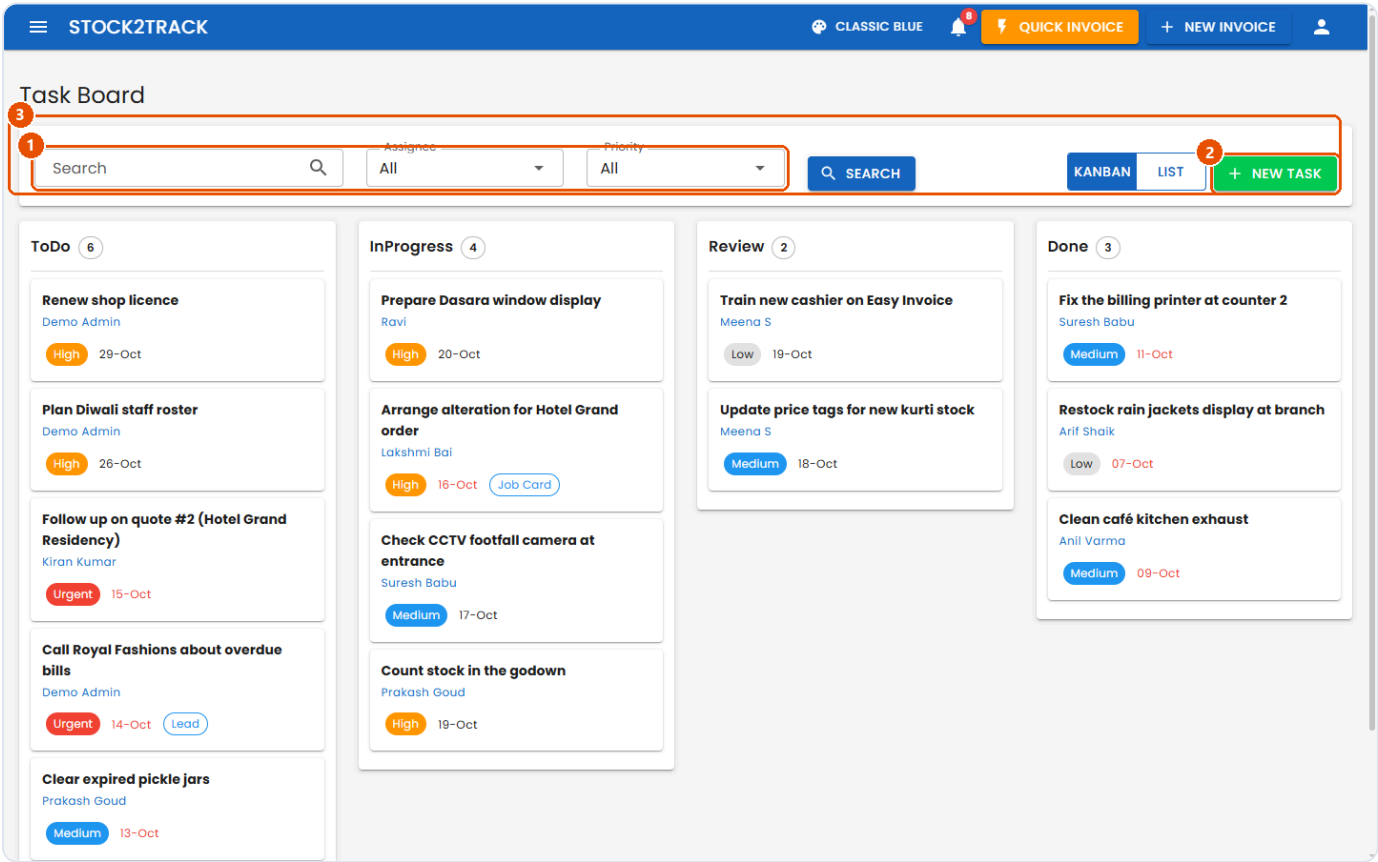


Figure 6. The task board

- 1

Search, assignee and priority
- 2

Add a task
- 3

To Do, In Progress, Review, Done

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6

Renew shop licence

Demo Admin

High 29-Oct

Plan Diwali staff roster

Demo Admin

High 26-Oct

Follow up on quote #2 (Hotel Grand Residency)

Kiran Kumar

Urgent 15-Oct

Call Royal Fashions about overdue bills

Demo Admin

Urgent 14-Oct

Lead

Clear expired pickle jars

Prakash Goud

Medium 13-Oct

Send festival offer to champions

Sneha Rao

Medium 22-Oct

4

Prepare Dasara window display

Put up Dasara price tags

Change the price tags on the festive rack before Saturday.

Assigned To Ravi

Priority High

Due Date

Linked Module None

CANCEL SAVE

2

Train new cashier on Easy Invoice

Meena S

3

Fix the billing printer at counter 2

Suresh Babu

Medium 11-Oct

Restock rain jackets display at branch

Arif Shaik

Low 07-Oct

Clean café kitchen exhaust

Anil Varma

Medium 09-Oct

Figure 7. A new task

- 1 Title, description, who, priority, due date and link

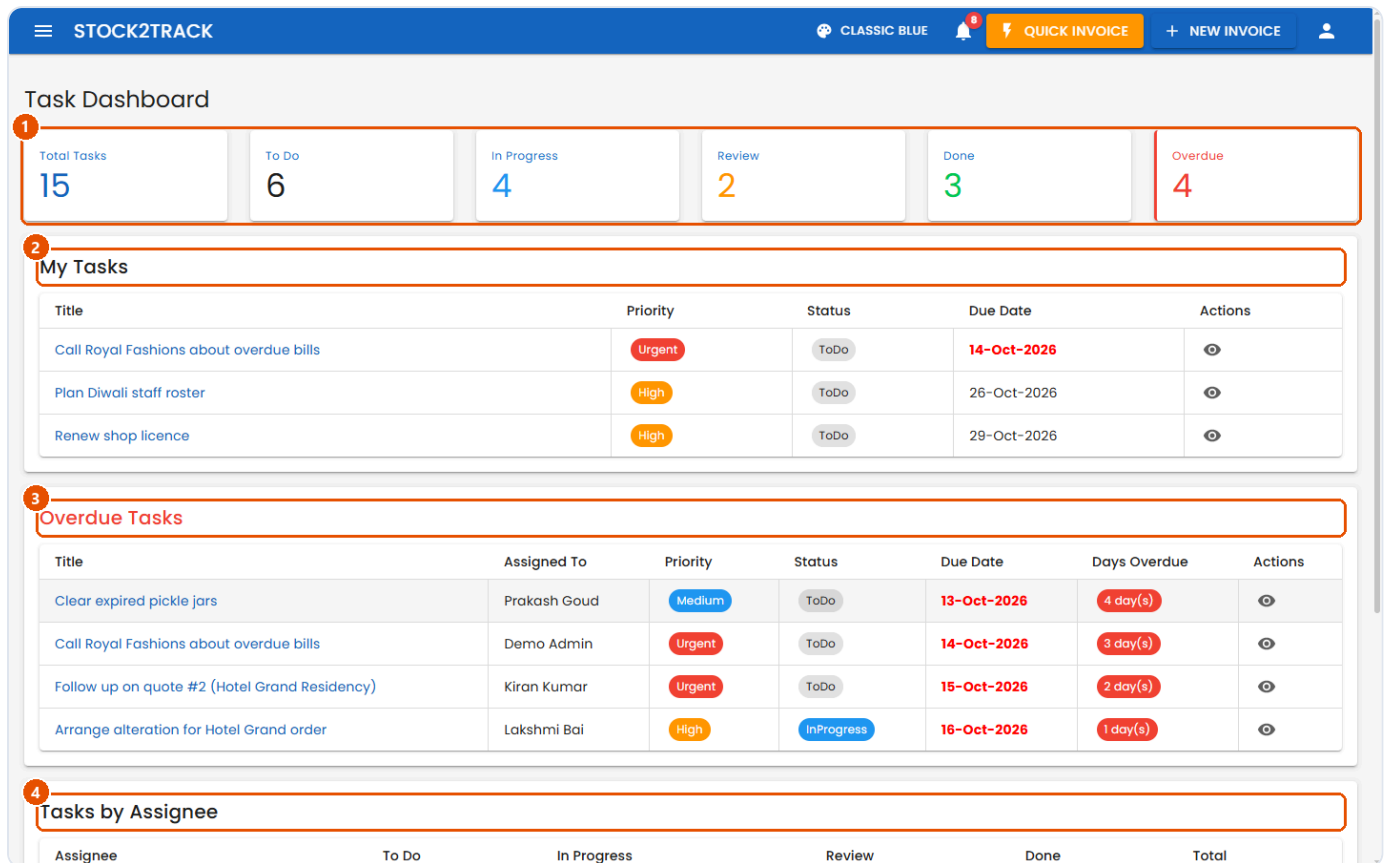


Figure 8. Task dashboard

- 1 Totals and overdue
- 2 Your tasks
- 3 Late tasks and who has them
- 4 Work by person

Before you start

Privilege **Task View**. The **Tasks** module must be on.

Good to know

- Tasks are assigned to the staff list (HR > Employees), not to logins.

Appointments

A day board with your staff, chairs or rooms across the top and the time down the side.

Who	Reception	How often	All day
-----	-----------	-----------	---------

Why it matters

Booked customers arrive to a free chair; walk-ins are fitted into gaps you can see.

How to use it

1. Open **Appointments > Day Board**. Use the arrows or **Today** to change the day. The chips count booked, waiting, in service, completed and no-shows.
2. Click an empty slot. Type the **Mobile number** (an existing customer is found), the **Customer name** and the **Service**. Check the start and minutes, and press **Book**.
3. Click a booking to move it on: **Mark arrived**, **Start service**, **Complete**, and **Bill this customer**. **Did not come** records a no-show.
4. In **Appointments > Resources & Hours**, add each staff member, chair or room, its working hours, and days off.

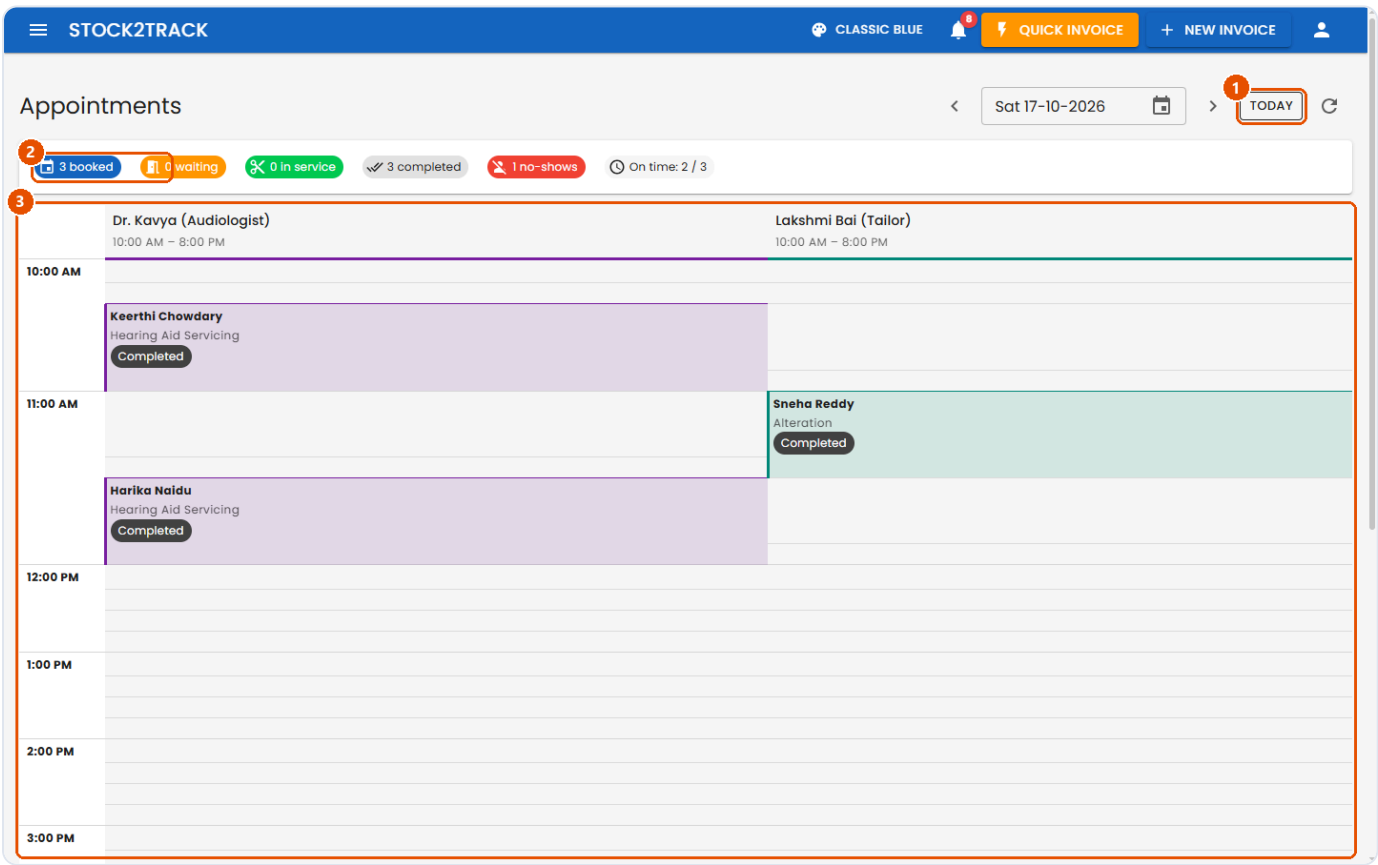


Figure 9. The day board

- 1 Back to today
- 2 Booked, waiting, in service, completed, no-shows
- 3 Staff or chairs across, time down

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QUICK INVOICE

NEW INVOICE

1:00 PM

2:00 PM

3:00 PM

4:00 PM

5:00 PM

6:00 PM

7:00 PM

Venkat Rao
Hearing Aid Servicing
Confirmed

Rohit Kumar
Hearing Aid Servicing
Booked

New appointment

Lakshmi Bai (Tailor) – Saturday 17 Oct, 6:00 PM

1 Mobile number 9848044332

2 Customer name Ramana Murthy

3 Service Hearing Aid Servicing

4 Start time 30 Minutes

Notes

Ends at 6:30 PM

CANCEL

5 BOOK

Figure 10. Booking a slot

- 1 Mobile finds the customer
- 2 Name
- 3 Service
- 4 Start time and length
- 5 Book

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QUICK INVOICE

NEW INVOICE

Appointment Resources & Hours

Add Resource

1

Name *

Priya, Chair 3, Room 1

2

Type

Staff

Employee

(not linked)

X

Board colour

Purple

Order

0

Links approved leave to availability

Online

+ ADD

3

	Name *	Type	Employee	Online	Active	Actions
	Dr. Kavya (Audiologist)	Staff	—	Yes	Active	Edit Delete
	Lakshmi Bai (Tailor)	Staff	—	Yes	Active	Edit Delete

Figure 11. Resources and hours

- 1 Name of the staff member, chair or room
- 2 Type

- 3 Your resources; edit to set hours

Before you start

Privileges **Appointments** and **Appointment Setup**. Services come from Service Jobs > Service Types.

Good to know

- A booking outside someone's hours shows a warning but is allowed.

Footfall and Conversion

How many people walked in, when, and how many of them bought.

Who	Owner	How often	Daily
-----	-------	-----------	-------

Why it matters

Sales alone cannot tell a quiet day from a day when visitors left without buying. Conversion can.

How to use it

1. Open **Footfall > Dashboard**. The tiles show visitors today, the peak hours, and new and repeat visitors. The chart shows visitors by hour.
2. **Today at a glance** shows invoices, the conversion rate (bills ÷ visitors), the busiest hour and whether the cameras are working.
3. Open **Footfall > Footfall & Conversion**, choose the dates and press **Show** for each day's footfall, bills, conversion, sales and average bill.
4. Cameras are registered in **Admin > Cameras & Device Keys**: the PC running the counting agent, the camera id and the shop.

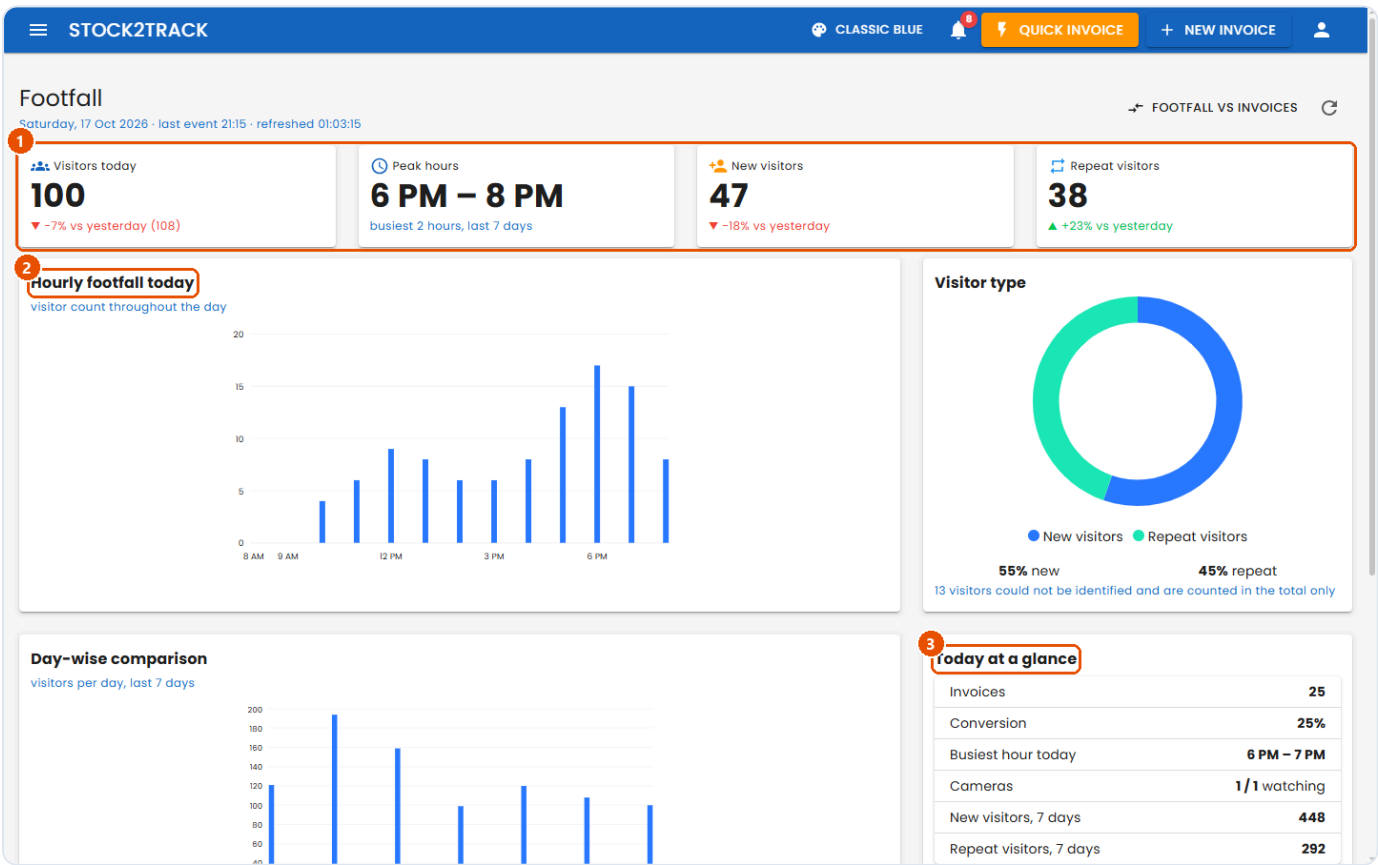


Figure 12. Footfall dashboard

- 1

Visitors today, peak hours, new and repeat
- 2

Visitors by hour
- 3

Bills, conversion and camera status

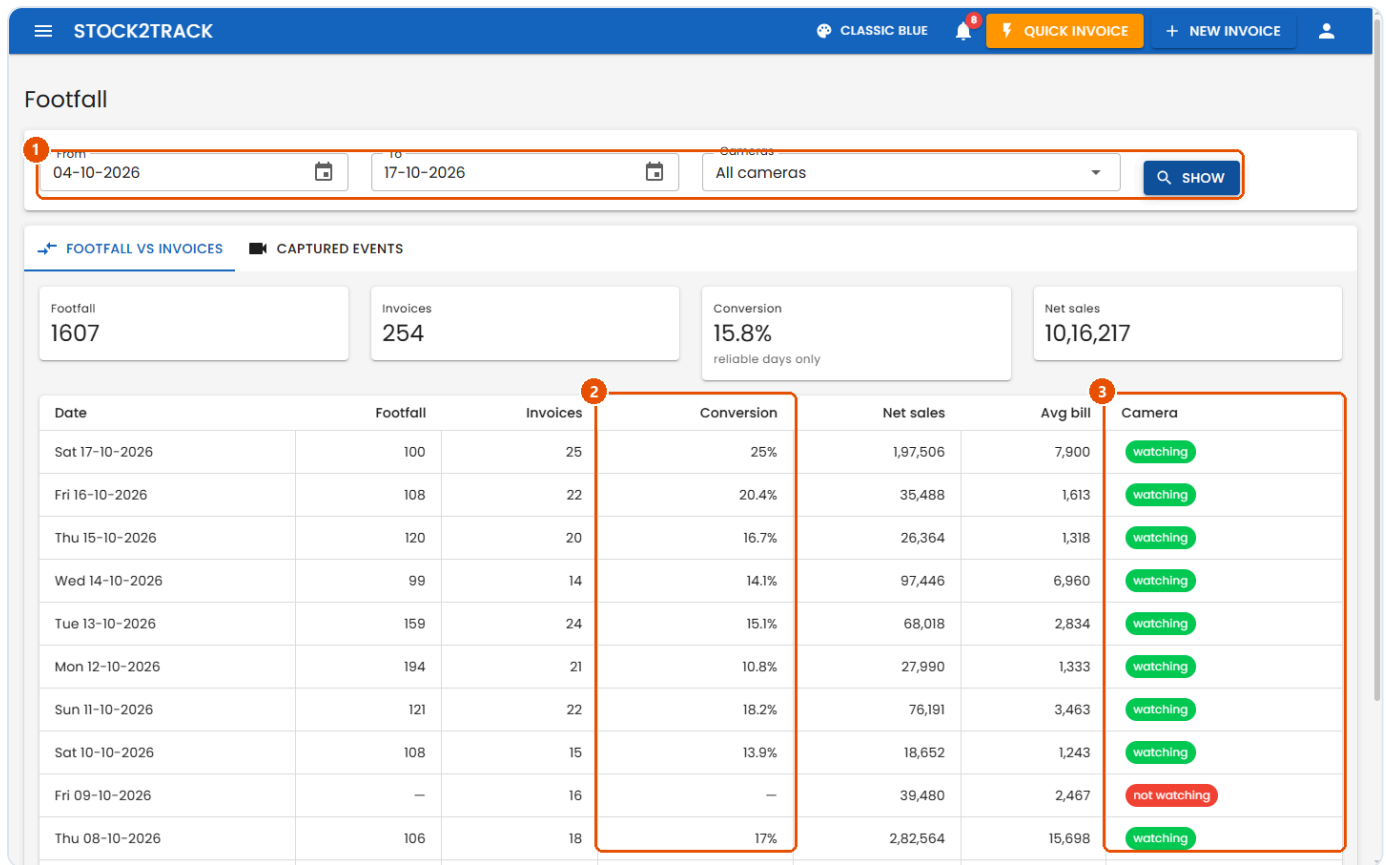


Figure 13. Footfall against bills

- 1 Dates and cameras
- 2 Bills ÷ visitors
- 3 Was the camera watching?

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QUICK INVOICE

NEW INVOICE

Cameras & Device Keys

Register each camera and issue the key its agent uses to post footfall. Only the key's fingerprint is stored, so a key is shown once and cannot be looked up again - only replaced.

1 Register a camera

2

Edge PC (X-Device-Id) *

camera_id *

Shop *

The PC running the agent, e.g. VISION-PC-01

Must match camera_id in the agent's payload exactly

Keep this PC's existing key

Identity mode (advanced)

REGISTER CAMERA

3

Edge PC (X-Device-Id) *	camera_id *	Shop *	Config	Identity	Active	Key issued	Last event	Actions
VISION-PC-01	ENTRANCE-01	Main Store (10024)	line-vl	Identity	Active	17-09-2026 demo	17-10-2026 21:15	

Check a key

Paste the key an integrator is using to see which cameras it actually unlocks. Nothing is changed or stored.

Paste the key (starts with s2tk_)

CHECK

Figure 14. Cameras

- 1 Register a camera
- 2 The PC and the shop

- 3 Registered cameras

Before you start

Privilege **Footfall Reports**; cameras need **Footfall Setup**. The **Footfall** module must be on.

Good to know

- A day when a camera was not watching gets no conversion figure, so it cannot mislead you.
- A new key for a PC takes its cameras offline until the agent is updated with it.

Permissions

Permission	What it allows
View Customer / Customer Creation / Update Customer / Delete Customer	The customer list
Lead View	The lead list (own leads only)
Lead All Owners	Everyone's leads
Lead Creation / Lead Update / Lead Delete / Lead Convert	Adding, changing, deleting and converting leads
Lead Reports	Missed and converted leads
Task View / Task Dashboard	Tasks
Appointments / Appointment Setup	The day board; resources and hours
Footfall Reports / Footfall Setup	Footfall dashboards; cameras and keys

Member QR codes, loyalty points and the members report are in the eCommerce manual.