



Pipeline

"One pipeline, not five spreadsheets."

B2B sales CRM for Veltrade Distributors — five 1440px screens and a component set

🔍

Search deals, contacts, quotes...

/

My deals

All deals

+ New deal

🏠 Dashboard

📋 Deals

👤 Contacts

📄 Quotes

📦 Orders

📊 Reports

AM

Arjun Mehta

Field Sales · West

Dashboard

PIPELINE VALUE

₹1,86,40,000

30 open deals across 4 stages

DEALS IN NEGOTIATION

6 ₹34,20,000

avg 9 days in stage

OVERDUE FOLLOW-UPS

3

of 12 due today · oldest 4 days

WON THIS MONTH

₹22,80,000

5 deals · 31% win rate

Today's follow-ups

12

VIEW ALL →

DEAL	CONTACT	VIA	QUOTE	DUE	
SS fastener bulk order Sharma Engineering Works	Ramesh Gupta	🗨	QT-2041	09:30	Overdue 2d
Gate valve resupply Kaveri Pumps & Valves	Priya Nair	📞	QT-2036	10:15	Overdue 4d
Conveyor line retrofit Deccan Fabricators	Suresh Patil	🗨	QT-2049	11:00	
Bearing housings ×40 Lakshmi Industrial Supplies	Meena Iyer	🗨	—	12:30	Overdue 1d
HT bolts annual contract Apex Bearings Co	Anil Deshmukh	✉	QT-2044	14:30	
Pump seals trial order Coastal Marine Engineering	Farhan Qureshi	📞	QT-2047	16:00	
MS channel supply Deccan Fabricators	Suresh Patil	🗨	—	17:30	

Pipeline by stage

New

₹58,40,000

Qualified

₹49,60,000

Quote Sent

₹44,20,000

Negotiation

₹34,20,000

TOTAL OPEN

₹1,86,40,000

Win rate by rep

01 Kavita Rao

38%

02 Arjun Mehta

31%

03 Vikram Shetty

27%

04 Anil Kumar

22%

Pipeline

Dashboard

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Contacts / Ramesh Gupta

Search deals, contacts, quotes...

My deals

All deals

+ New contact

Edit contact

RG

Ramesh Gupta

Purchase Manager · Sharma Engineering Works

+91 98204 41738

ramesh@sharmaeng.in

Source · IndiaMART

Rep · Arjun Mehta

Call

Note

WhatsApp

Log a call — outcome, next step...

Log

Activity

All

Calls

WhatsApp

Quotes

Notes

- Ramesh Gupta

incoming · via WhatsApp Business

Today 11:42

"Send the revised quote for the SS fasteners — need it before Thursday's purchase meeting."
- Arjun Mehta

sent a quote

Today 09:12

QT-2041 SS fastener bulk order ₹4,50,000

Sent

 valid till 12 Aug
- Arjun Mehta

outgoing call · 6m 40s

Yesterday 16:05

Discussed quantity break at 5,000 units. He will confirm with the plant head by Wednesday.
- Arjun Mehta

added a note

Yesterday 10:30

Prefers WhatsApp over email. Net-30 payment terms approved by finance for orders under ₹10,00,000.
- Arjun Mehta

outgoing · via WhatsApp Business

Mon 18:22

"Sharing catalog pages for DIN 933 hex bolts — grades 8.8 and 10.9 both in stock."
- Arjun Mehta

sent a quote

14 Jul 15:48

QT-2033 Anchor fastener trial ₹80,000

Accepted

SHOW EARLIER ACTIVITY ↓

Open deals

3

+ NEW

SS fastener bulk order

Hot

₹4,50,000

Quote Sent

closes 15 Aug

HT bolts annual contract

₹7,60,000

Negotiation

closes 29 Aug

Anchor fasteners — phase 2

₹80,000

New

closes 8 Sep

Lifetime value

Total quoted ₹48,20,000

Total won ₹31,60,000

Open value ₹12,90,000

WON OPEN LOST

Pipeline

Dashboard

III Deals

 Contacts

Quotes

Orders

|| Reports

Deals

New 8
₹58,40,000

**Anchor fasteners —
phase 2**

Sharma Engineering Works

₹80,000

2d in
stage

🕒 30
Jul

Chain sprockets
enquiry
Mahindra Agro Works
₹1,90,000
1d in
stage

Hose couplings restock
Bharat Hydraulics
₹2,60,000
4d in stage 🕒 1 Aug
+5 MORE

Qualified 7
₹49,60,000

Pump seals trial order Hot
Coastal Marine Engineering
₹2,40,000
5d in stage Today 16:00

MS channel supply
Deccan Fabricators
₹6,10,000
3d in stage ⌚ 2 Aug

Gearbox spares kit
Mahindra Agro Works
₹3,70,000
7d in stage © 4 Aug
[+4 MORE](#)

Quote
Sent

SS fastener bulk order
Sharma Engineering Works
₹4,50,000 Overdue
2d
4d in 🕒 was 26 Jul
stage

Gate valve resupply
Kaveri Pumps & Valves
₹3,20,000
8d in stage ⌚ 1 Aug

Bearing housings ×40
Lakshmi Industrial Supplies
₹5,80,000
6d in stage 🕒 3 Aug
[+6 MORE](#)

Negotiation 6
₹34,20,000

Compressor valve plates
Bharat Hydraulics
₹4,90,000
12d in stage 5 Aug

**Conveyor line
retrofit**

HT bolts annual contract

Apex Bearings Co

₹7,60,000

9d in stage 1 Aug

Won 5
₹22,80,000

**Compressor
spares AMC**

₹8,40,000

V-belt bulk order

₹2,10,000

+3

Lost 3
₹6,40,000

Forklift tyre set
₹1,60,000

Crane hook block
₹2,90,000

+1

← Backward move — note required

required
"Gate Valve resupply" is moving Quote Sent → Qualified. Add a reason for the audit trail.

Cancel

Move with note

AM **Arjun Mehta**
Field Sales · West

Pipeline

Dashboard

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Quotes / QT-2049

Search deals, contacts, quotes...

My deals

All deals

+ New quote

QT-2049

Sent

Valid till 14 Aug 2026

Deal Conveyor line retrofit

Contact Suresh Patil · Deccan Fabricators

Owner Arjun Mehta

PRODUCT	QTY	UNIT PRICE	LINE TOTAL
MS conveyor roller 76mm CVR-076	120	₹1,850	₹2,22,000
Taper roller bearing 30208 BRG-30208	240	₹410	₹98,400
PVC belt 800mm × 10m BLT-800	6	₹38,200	₹2,29,200
Drive pulley assembly PLY-450	4	₹66,350	₹2,65,400
+ Add line — search catalog 2,400 SKUs			
		Subtotal	₹8,15,000
		GST (18%)	₹1,46,700
		Grand total	₹9,61,700

Send quote

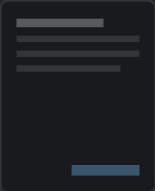
WhatsApp

Email

MESSAGE TEMPLATE

CHANGE

Hi {name}, your quote {quote_number} for {deal} is ready — {grand_total}, valid till {valid_till}. Reply here to confirm or request changes.



QT-2049.pdf

2 pages · 214 KB · A4

PREVIEW ↗

STATUS

- Draft created
28 Jul 09:41
- Sent via WhatsApp
28 Jul 10:05 ✓ seen 10:12
- Accepted
—

Send reminder

AUTO-REMINDER 12 AUG · EXPIRES 14 AUG

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Arjun Mehta

Field Sales · West

Deals / Conveyor line retrofit

Q

Search deals, contacts, quotes...

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My deals

All deals

Schedule follow-up

DEAL

Conveyor line retrofit

Deccan Fabricators

Value

₹9,61,700

Stage

Negotiation

Expected close

18 Aug

Owner

Arjun Mehta

QUOTES

QT-2049

Sent

₹9,61,700

QT-2042

Superseded

₹8,74,000

SP

Suresh Patil

+91 98230 55817

via WhatsApp Business

MON 27 JUL

Hi Suresh, sharing quote QT-2049 for the conveyor retrofit — ₹9,61,700 all-in with GST. Valid till 14 Aug.

10:05 ✓

QT-2049.pdf

214 KB · 2 pages

10:05 ✓

Received. Purchase head wants the pulley assembly qty at 6 instead of 4 — can you rework?

11:20

TODAY

Reworking with qty 6 — revised PDF by 4 pm. Delivery by 18 Aug holds if we book this week.

09:14 ✓

Ok, share the revised quote here.

09:40

APPROVED TEMPLATES

8

Revised quote

Hi {name}, the revised {quote_number} is attached — new total {grand_total}.

Quote follow-up

Hi {name}, any questions on {quote_number}? Happy to walk through it on a call.

Delivery confirmation

Order {order_number} is booked — dispatch on {dispatch_date}.

Templates ^

Message Suresh...

Follow-ups

+ ADD

Confirm revised qty with plant head

was due yesterday 17:00

Overdue 1d

Snooze

Done

Send revised quote QT-2049-R

Today 16:00

Snooze

Done

Decision call with purchase head

31 Jul 11:00

Snooze

Done

AUTO-REMINDER

QT-2049 expires 14 Aug — a reminder is scheduled for 12 Aug 10:00.

Open deal

Components Space Grotesk 600 headlines · Inter UI · JetBrains Mono figures, tabular

STAGE CHIPS

- New
- Qualified
- Quote Sent
- Negotiation
- Won
- Lost

- Hot lead
- Overdue 2d
- ← the only coral in the system

BUTTONS

- + New quote
- Send reminder
- Snooze
- ...

- Disabled

- My deals
- All deals

TEMPLATE TOKEN

- {name}
- {quote_number}
- {grand_total}

Hi {name}, quote {quote_number} is ready.

STAT TILE

PIPELINE VALUE

₹1,86,40,000

30 open deals across 4 stages

DEAL CARD

SS fastener bulk order

Sharma Engineering Works

₹4,50,000

4d in stage

Hot

Overdue 2d

was 26 Jul

FOLLOW-UP ROW

Confirm revised qty with plant head

was due yesterday 17:00

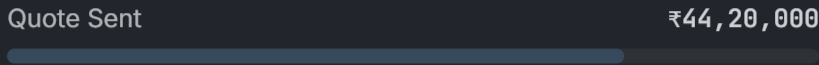
Overdue 1d

- Snooze
- Done

TABLE ROW

DEAL	QUOTE	DUE
Gate valve resupply Kaveri Pumps & Valves	QT-2036	10:15

FUNNEL BAR



EMPTY STATE

No follow-ups today

A calm pipeline reads almost monochrome.

Schedule one