



ENQUIRY MANAGEMENT SYSTEM

No lead goes cold because nobody owned it.

Every walk-in, phone call and website form recorded against a handler with a callback date — plus the email and WhatsApp templates to answer them the same day.

Capture

Assign

Follow up

Convert

Report

Sysfo

Enquiry Workspace

Dashboard

Enquiry Masters

Communication Tem...

Enquiry

Add Enquiry

Manage Enquiries

Search Enquiry

Enquiry Reports

Version 1.0.0

Sysfo Enquiry — Manage Enquiries

Enquiry / Enquiry / Manage Enquiries

Search forms & pages... Ctrl+K

SA Anita Rao (Sysfo Software S SuperAdmin)

Manage Enquiries

View and manage all enquiries and leads.

2 Selected

13/Oct/2025 - 13/Oct/2026

All Fields

Enter Criteria...

Search

PDF

EXCEL

15 / page

#	ENQUIRY NO	ENQUIRY DATE	NAME	MOBILE	EMAIL	PRODUCT	STATUS	HANDLED BY	ASSIGNED TO	EXPECTED CALLBACK
1	5006	17-Jun-2026	Vipul Maurya	+91 98765 43210	—	Domain (.com)	Open	Anita Rao	 	—
2	5007	13-May-2026	Ramesh	+91 98765 43210	accounts@acme-industries.example	Levis	Open	Anita Rao	 	—
3	5008	11-Jul-2026	Sneha Kulkarni	+91 98765 43210	accounts@acme-industries.example	—	Open	Anita Rao	—	—
4	5009	11-Jul-2026	Sneha	+91 98765 43210	accounts@acme-industries.example	—	New	Anita Rao	—	—
5	5010	11-Jul-2026	Nikhil Shah	+91 98765 43210	accounts@acme-industries.example	—	Open	Anita Rao	—	—
6	5004	07-Jul-2026	Nikhil Shah	+91 98765 43210	accounts@acme-industries.example	Levis	Open	Anita Rao	 	—
7	5005	07-Jul-2026	Vikar Kumar	462895699	accounts@acme-industries.example	Business	Open	Vikram Rao	  	08-Jul-2026
8	5002	06-Jul-2026	Sneha Kulkarni	+91 98765 43210	accounts@acme-industries.example	Starter	Open	Anita Rao	 	07-Jul-2026
9	5001	05-Jul-2026	Priya Sharma	+91 98765 43210	accounts@acme-industries.example	Domain (.com)	Open	Anita Rao	 	05-Jul-2026

15 / page 1-9 of 9 records

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WHY SYSFO ENQUIRY

The enquiry you lose is the one nobody was accountable for.

Leads rarely die of rejection. They die of silence — the callback nobody diarised, the walk-in only one person remembers, the website form that went to an inbox on leave. This module makes ownership and the next date compulsory, then reports on both.

18

screens in the module

8

enquiry reports

2

template libraries:
Email & WhatsApp

1

handler accountable
for each lead



Captured, however it arrives

Walk-in, phone, referral or the website contact form — which writes the enquiry itself, so nothing depends on someone forwarding an email.



Owned by a person

Every enquiry carries a handler and a callback date. The handler log records each reassignment, so ownership is never ambiguous.



Answered from a template

Email and WhatsApp templates, grouped in categories — written once, approved once, used by everybody.

THE PATH

From a phone call to a client record.

Captured

Recorded in seconds, from any source.



Assigned

A handler owns it; a callback date is set.



Followed up

Logged contact by contact.



Quoted

Becomes a proposal, if you run that module.



Won

Becomes a client and a sales order.

Why leads go missing

Not because anyone decided to drop them. A walk-in is remembered by one person, a callback is promised verbally, a website form lands in an inbox that is on leave. None of that is visible to a manager until the month ends badly.

What changes

Ownership and the next date become fields, not intentions. The handler sees their own call list, the manager sees what is overdue across the team, and the source of every lead is recorded while it is still known.

CAPTURE & OWNERSHIP

Three fields decide whether a lead survives.

Who it is, who owns it, and when they will call back. Everything else is detail that can be filled in later — so recording a walk-in never takes longer than the walk-in does.

Record it

- **Add enquiry** — name, contact, location and what they want.
- **Enquiry For** and **Enquiry Type** masters keep the categories clean.
- **How Did You Find Us** master is what makes source reporting possible.
- **Search enquiry** across every field, however it was spelt.

Own it

- **Handler** assigned at capture, or reassigned later.
- **Enquiry Handler Log** — every reassignment, with who and when.
- **My Enquiries** — each person's own list, nobody else's.
- **Callback Date Report** is simply today's call list.

#	ENQUIRY NO.	ENQUIRY DATE	NAME	COMPANY	MOBILE	EMAIL	PRODUCT	STATUS	ASSIGNED TO	LAST FOLLOW-UP
1	5006	17-Jun-2026	Vipul Maurya	—	+91 98765 43210	—	Domain (.com)	Open	Anita Rao, Priya Sharma	08-Jul-20
2	5007	13-May-2026	Ramesh	—	+91 98765 43210	accounts@acme-industries.example	Levis	Open	Anita Rao, Priya Sharma	—
3	5008	11-Jul-2026	Sneha Kulkarni	Multination	+91 98765 43210	accounts@acme-industries.example	—	Open	—	—
4	5009	11-Jul-2026	Sneha	COIREAL	+91 98765 43210	accounts@acme-industries.example	—	New	—	—
5	5010	11-Jul-2026	Nikhil Shah	ABC	+91 98765 43210	accounts@acme-industries.example	—	Open	—	—
6	5004	07-Jul-2026	Nikhil Shah	TaTa	+91 98765 43210	accounts@acme-industries.example	Levis	Open	Anita Rao, Priya Sharma	—
7	5005	07-Jul-2026	Vikar Kumar	Info	462895699	accounts@acme-industries.example	Business	Open	Anita Rao, Priya Sharma, Vikram Rao	07-Jul-20
8	5002	06-Jul-2026	Sneha Kulkarni	Multination	+91 98765 43210	accounts@acme-industries.example	Starter	Open	Anita Rao, Priya Sharma	07-Jul-20
9	5001	05-Jul-2026	Priya Sharma	Sysfo	+91 98765 43210	accounts@acme-industries.example	Domain (.com)	Open	Anita Rao, Priya Sharma	10-Jul-20

Enquiry Report — every enquiry with its handler, source and callback date, filtered and exportable.

ANSWERED THE SAME DAY

The first reply does not wait for someone to be free.

An acknowledgement goes out the moment the enquiry is recorded, from a template you approved — so the lead knows they reached a real company while the handler is still reading it.

Thank you for your enquiry, **Zenith Retail**.
Your reference is **ENQ-02184** and **Rahul Mehta** will call you on **13-Oct-2026**. —
Sysfo Software Solutions

11:04 AM ✓✓

From your website

The contact form on your site writes an enquiry directly, so a form filled at midnight is on somebody's list at nine.

Reassigned cleanly

When a handler leaves or goes on leave, enquiries move with a logged reason — the history stays with the lead, not with the person.

Found again

Search Enquiry covers every field, so the caller who says "I spoke to someone last month" is located in seconds.

TEMPLATES & REPORTING

Which source is worth the money.

Because every enquiry carries a source, a location, a handler and a date, the eight reports answer the only questions that matter: where should we spend, and who is converting?



Where leads come from

- **Summary by Location** — which cities and regions respond.
- **Summary by Date / Month / Year** — volume and seasonality.
- **Enquiry Report** — the full filtered list, exportable.



How the team performs

- **Handler-wise Summary** — load and outcome per person.
- **My Enquiries** — the individual's own view.
- **Callback Date Report** — what is due and what is overdue.

Handler-wise Summary

October 2026 · sample data

HANDLER	ASSIGNED	CONTACTED	QUOTED	CONVERTED	OVERDUE	CONVERSION
Priya Sharma	46	44	19	11	1	23.9%
Rahul Mehta	38	33	12	6	3	15.8%
Sneha Kulkarni	29	29	14	9	—	31.0%
3 handlers	113	106	45	26	4	23.0%

Sample figures — the point is that assigned, contacted and converted are all recorded, so the ratio is a fact rather than an impression.

COMMUNICATION TEMPLATES

Six screens that keep the answers consistent.

Template Categories

Email Templates

WhatsApp Templates

Add Enquiry

Manage Enquiries

Search Enquiry

Enquiry Handler Log

How Did You Find Us Type

Enquiry For

Enquiry Type

Enquiry Report

My Enquiries

Handler-wise Summary

Callback Date Report

Summary by Location

Summary by Date

Summary by Month

Summary by Year

All eighteen screens in the module. Templates use the same trigger machinery as the rest of the platform, so an enquiry acknowledgement behaves exactly like an invoice notification.

Works on its own

The Enquiry module is complete by itself — capture, ownership, follow-up and reporting — and needs nothing else switched on to be useful from the first day.

Better with the rest

With Proposal, a won enquiry becomes a quotation. With Sales & Invoicing, an accepted quotation becomes a client, an order and an invoice — without the lead's details being typed a second time.

GET STARTED

Stop losing leads you already paid for.

We set up your enquiry types, sources and handlers, connect your website contact form, load your email and WhatsApp templates, and train the people who answer the phone.

1

Live demo

Capture, assignment, callbacks and the conversion reporting.

2

Setup & data

Masters, handlers, website form and your acknowledgement templates.

3

Training & go-live

Front desk, sales team and the manager's daily review.

COMPANY

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- ✓ Every enquiry owned by a named handler
- ✓ Website contact form writes enquiries directly
- ✓ Handler log for every reassignment
- ✓ Conversion measured, not estimated
- ✓ A callback date on every open lead
- ✓ Email and WhatsApp templates, used by everyone
- ✓ Source reporting that justifies ad spend
- ✓ 18 ready screens and 8 reports