

NextIsWhat

Getting Started with NextIsWhat

NextIsWhat tells your team what's next.

nextiswhat.com

Your first 14 days at a glance

Day 1
Sign up and bring in your leads.

Day 1–2
Add your team.

Every day
Work from Next Action.

Every day
The bar shows days left in your trial.

By day 14
Pay by UPI and keep going.

The one rule. Every lead and deal always has one next step, one owner and one due date. NextIsWhat asks for it every time you finish something, so nothing is ever forgotten.

One next step | **One owner** | **One due date**

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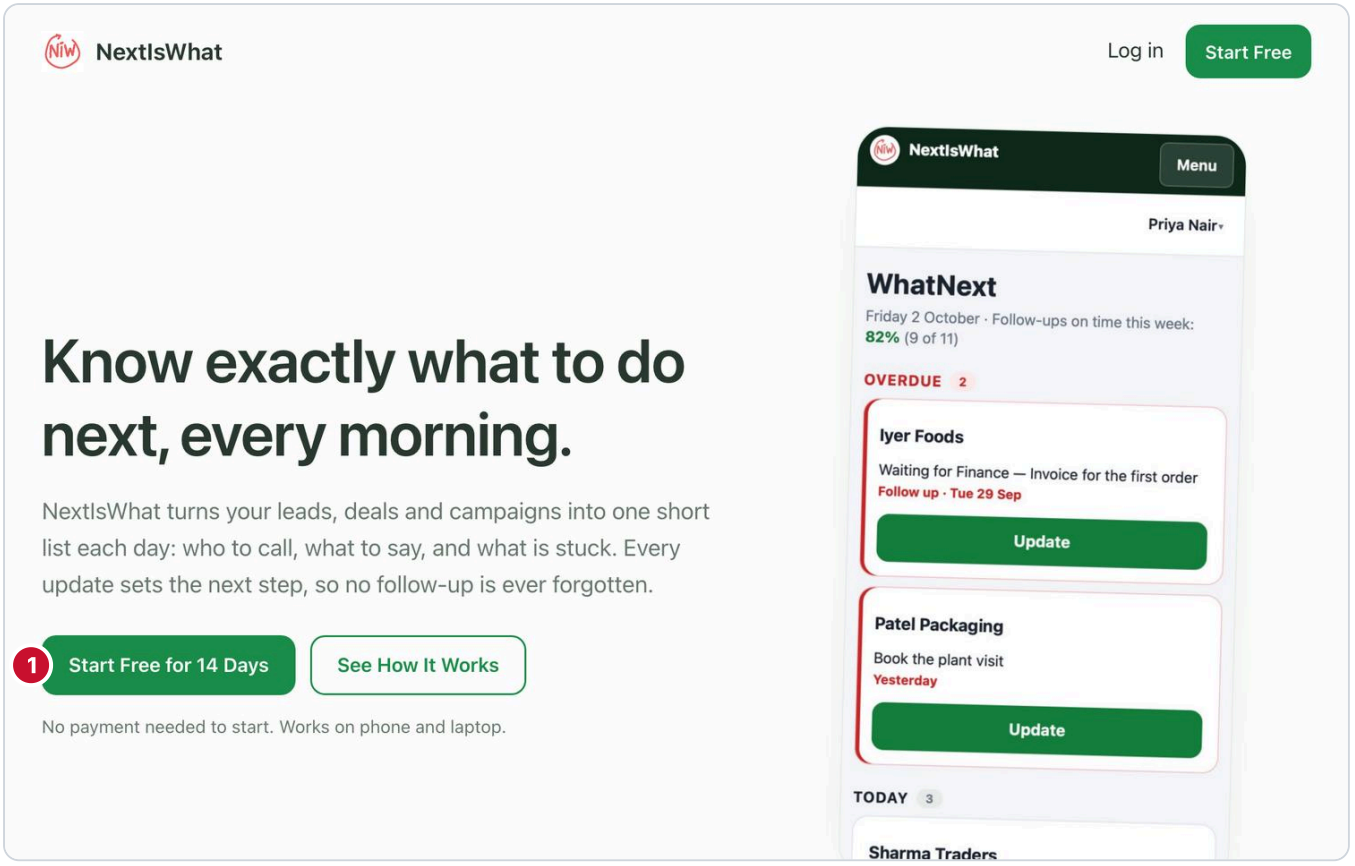
STEP 1

Start your free trial

Why this matters. Fourteen days with every feature switched on. No card, no payment, nothing to install.

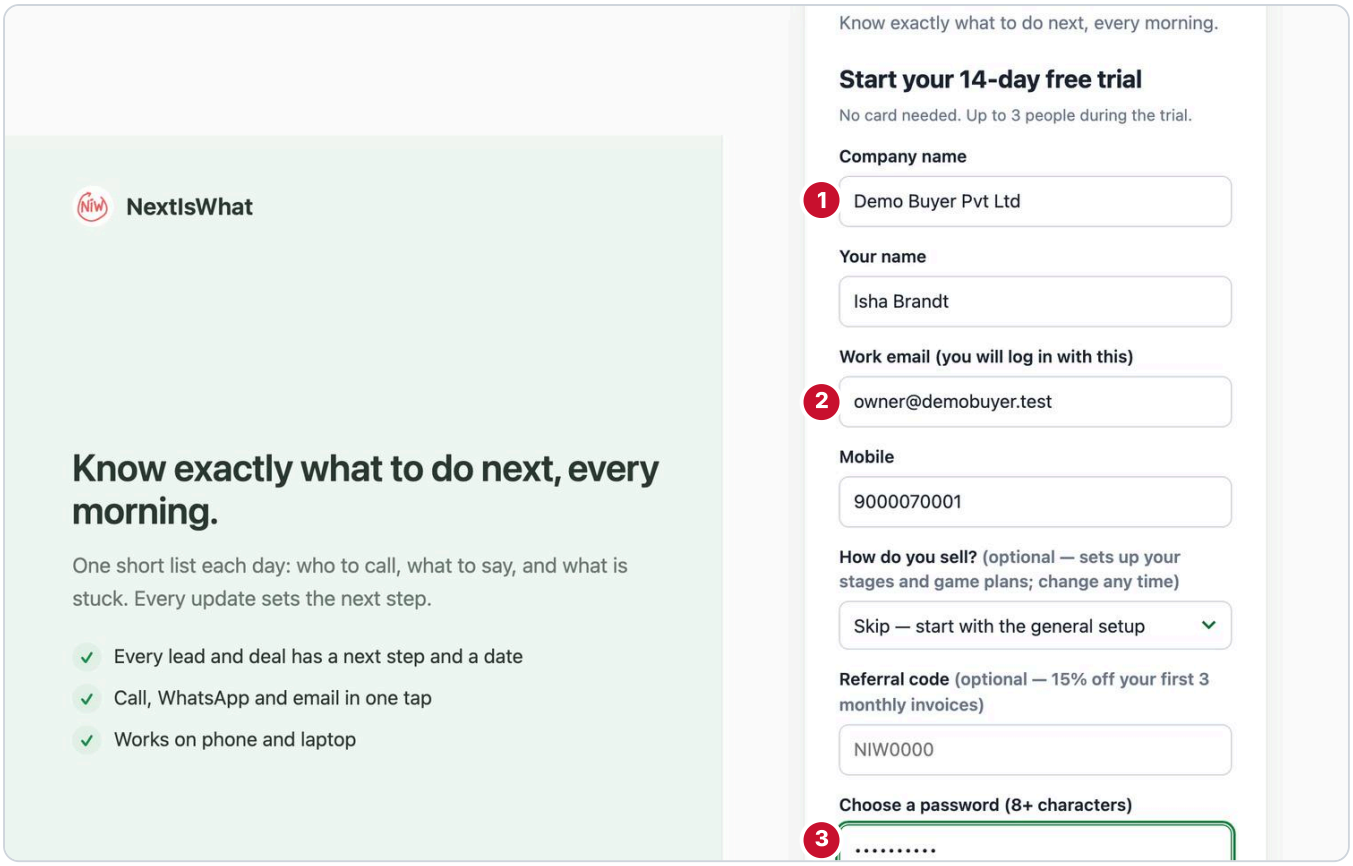
> **Tip** Use your company email, not a personal one. Sign-up is by email and password; there is no "Sign in with Google".

nextiswhat.com



1 Click Start Free for 14 Days.

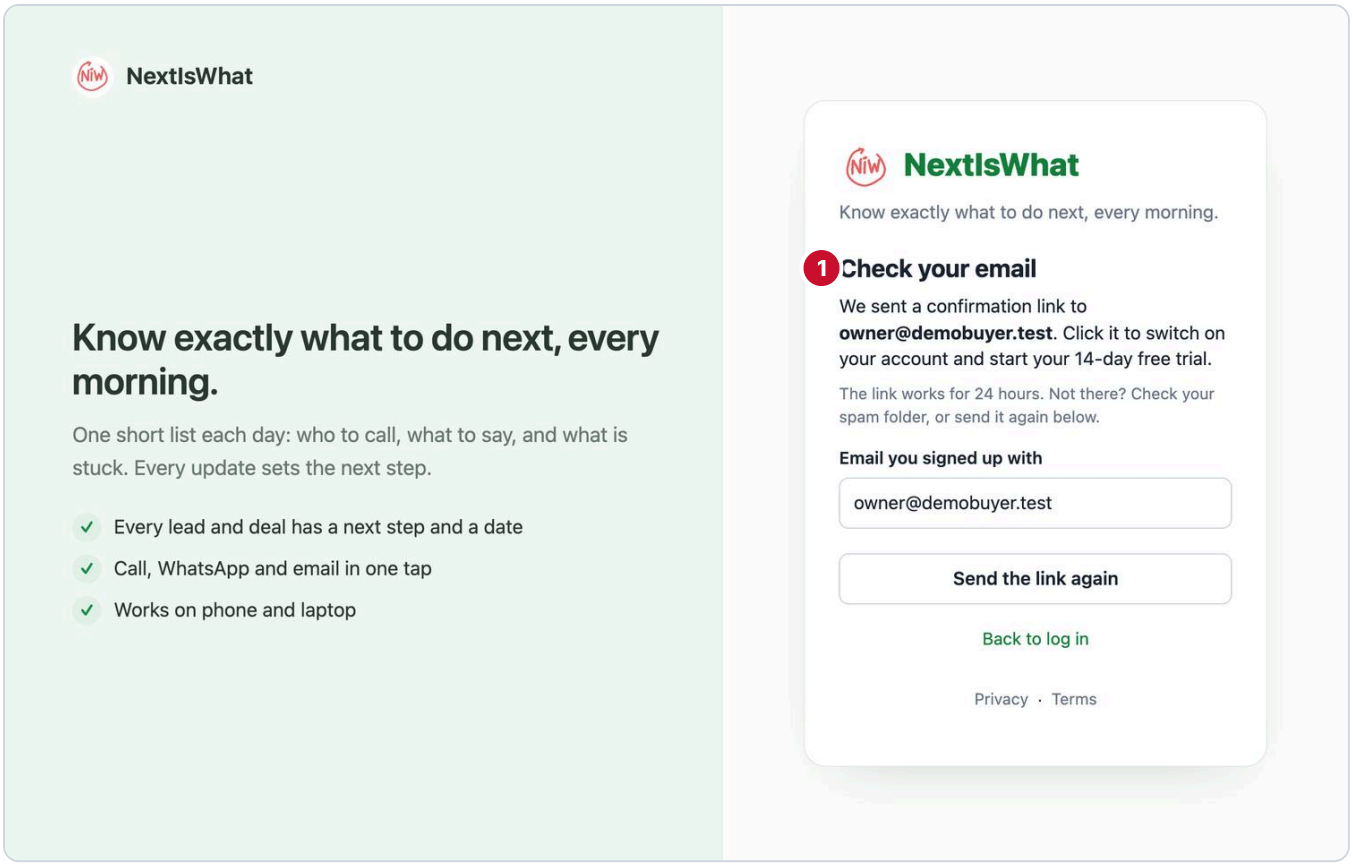
The sign-up form



1. Type your company name. It becomes the name of your workspace.
2. Type your company email. You log in with it.
3. Choose a password of 8 characters or more.
4. Click Start Free Trial.

The form also asks your name and mobile, and how you sell. That last one is optional: it sets up stages that suit you, and you can change them any time.

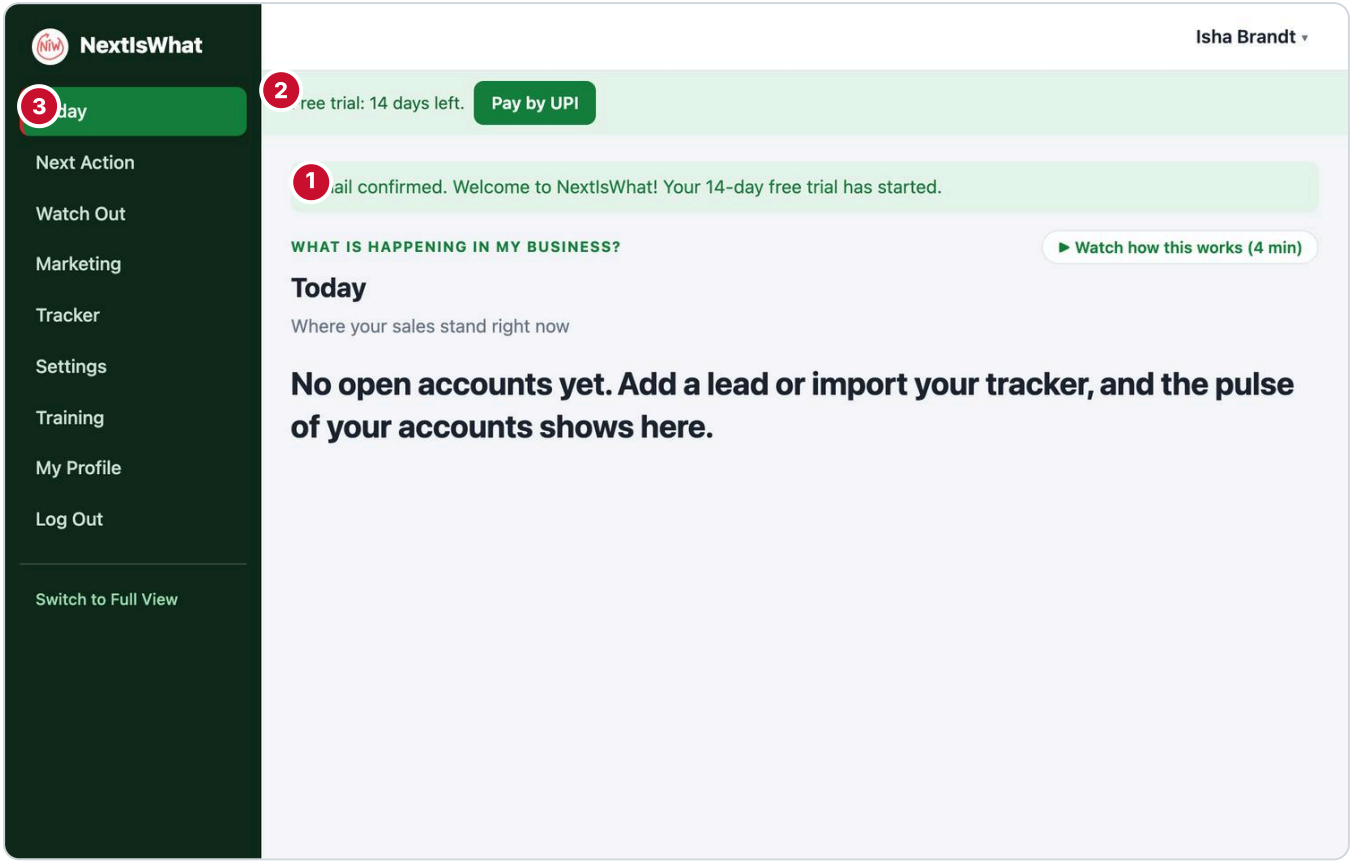
Check your email

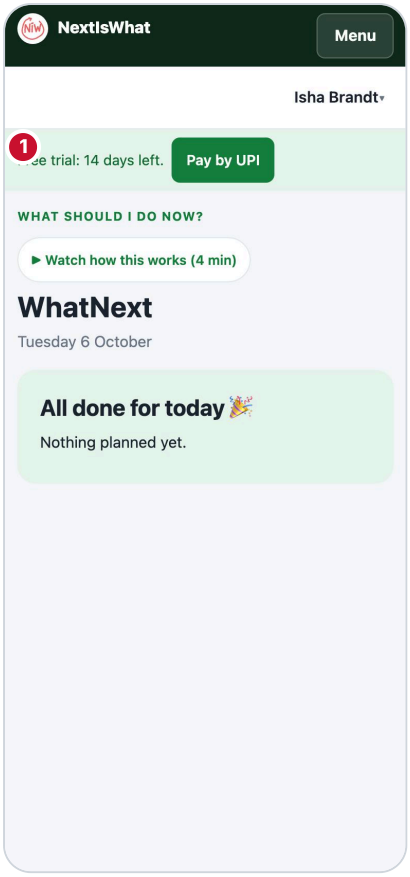


1 We send a confirmation link to your email. Open it and click the link.

Your 14 days start when you click the link, not when you fill in the form.

Your first login





On a phone

1. A welcome message confirms your trial has started.
2. This bar always shows how many trial days are left, with a Pay by UPI button.
3. Your menu. New companies start with a short, simple menu.

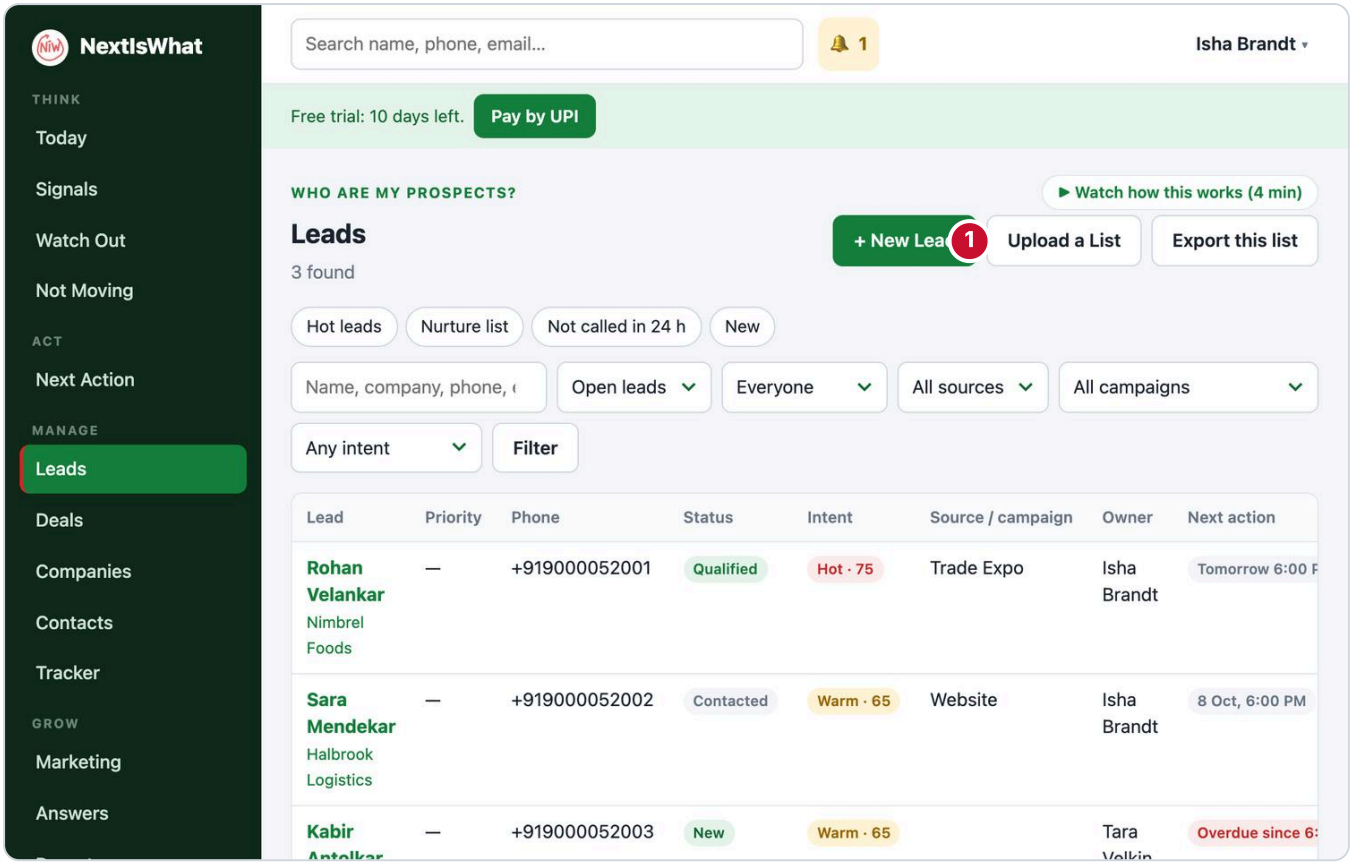
STEP 2

Bring in your leads and companies

Why this matters. Your customers are probably in a spreadsheet today. Bring them in once, and every one gets its first next step.

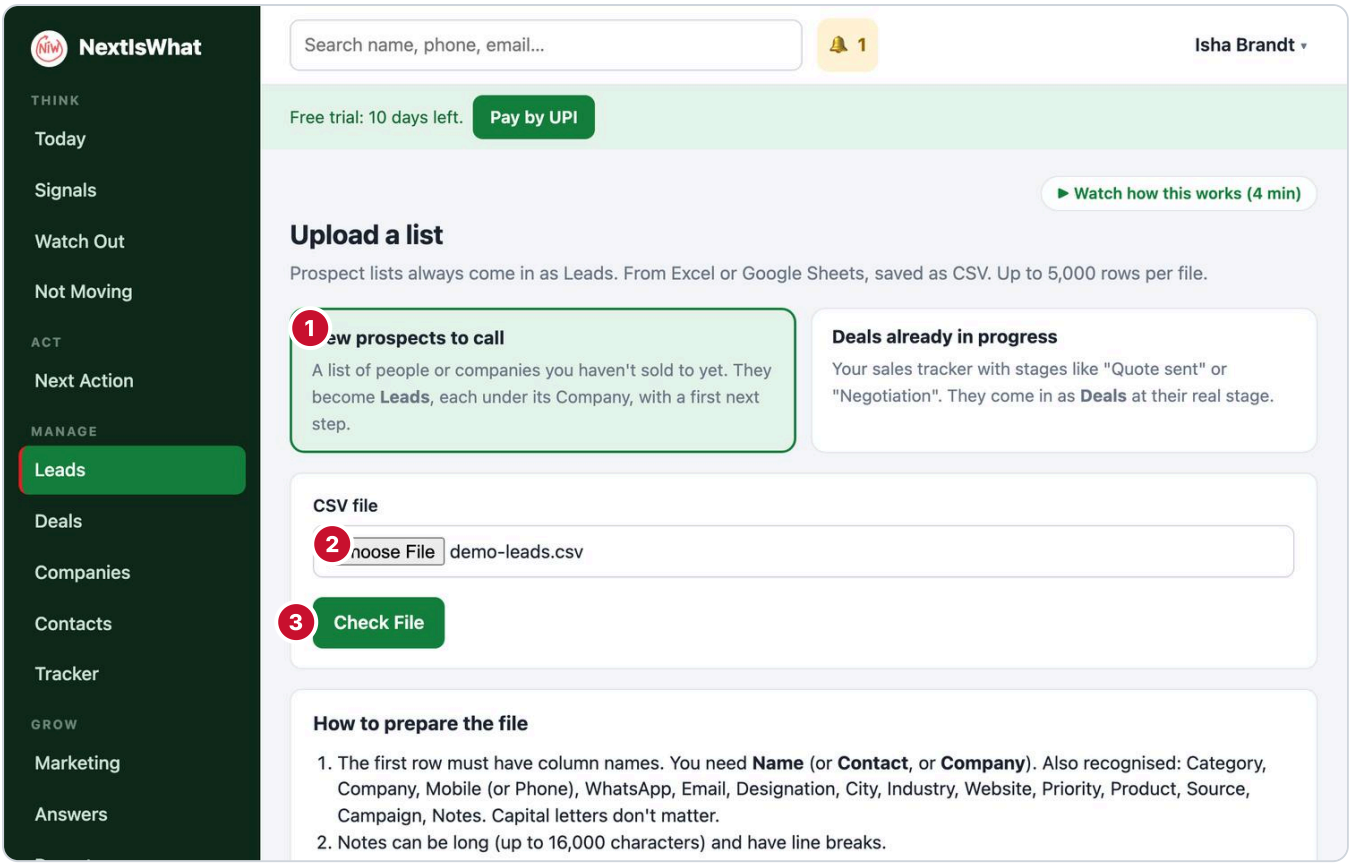
> **Tip** The first row of your file must have column names, like Name, Company, Mobile, Email. Up to 5,000 rows per file.

Leads



1 Open Leads, then click Upload a List.

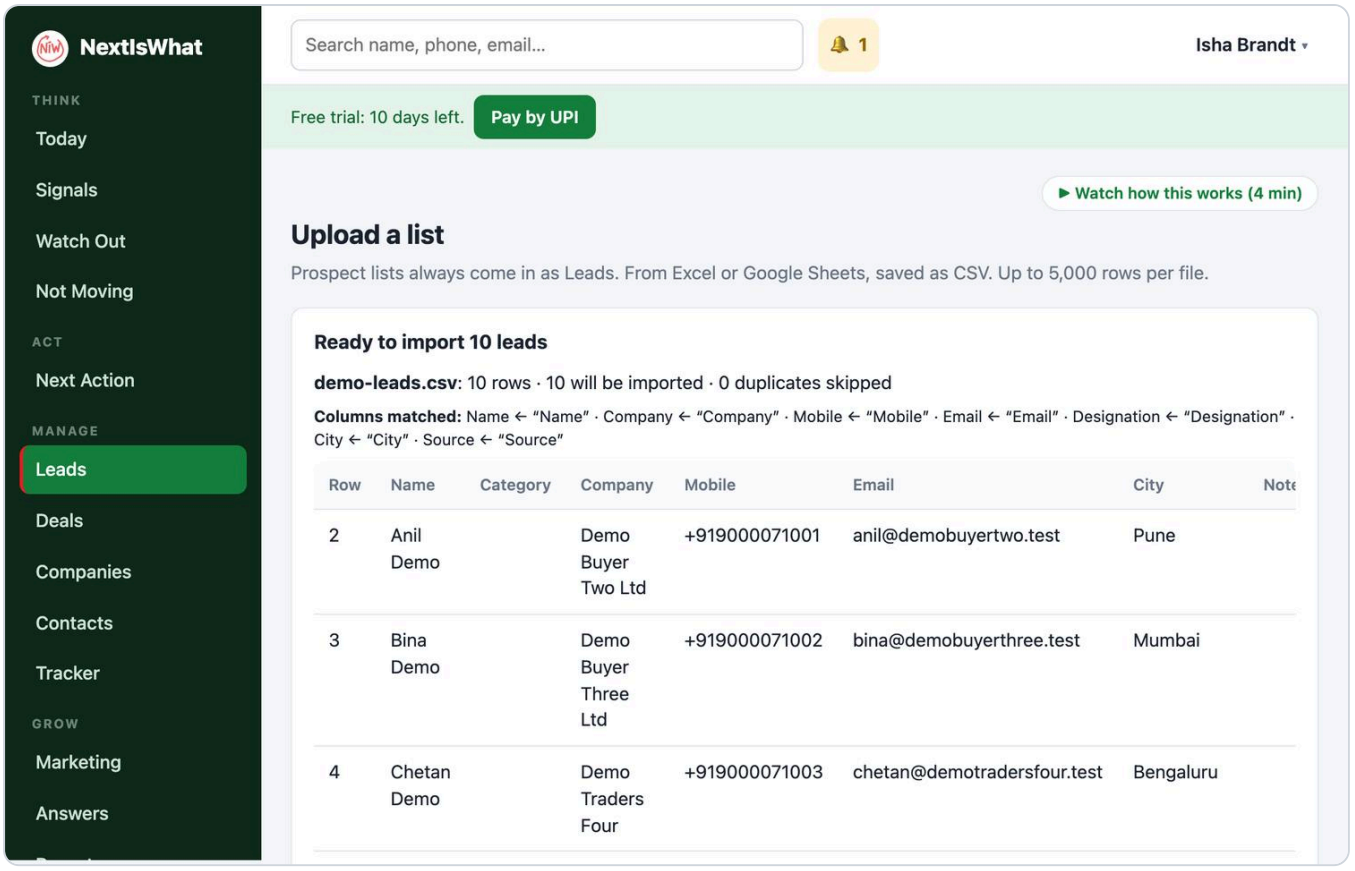
Upload a list



1. Choose New prospects to call. Each row becomes a lead, under its company, with a first next step.
2. Click Choose File and pick your CSV file.
3. Click Check File.

Already working on deals in a sheet with stages like "Quote sent"? Choose Deals already in progress instead: you match your columns, see a preview, and they come in as deals at their real stage.

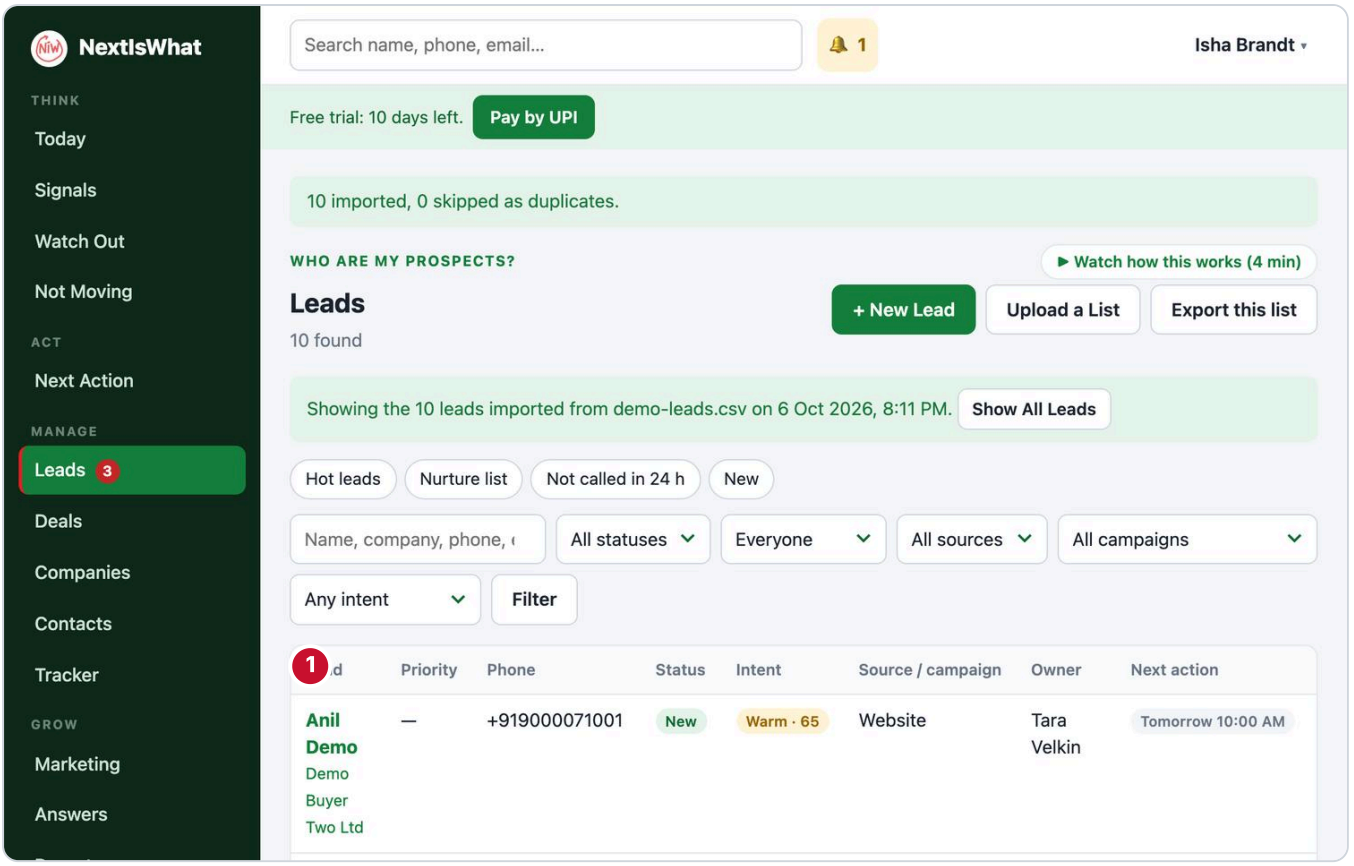
Check before you import



1. Check the preview: how many leads will be added, and any rows that are skipped and why. Choose who gets the leads and when the first call is due, then click Import.

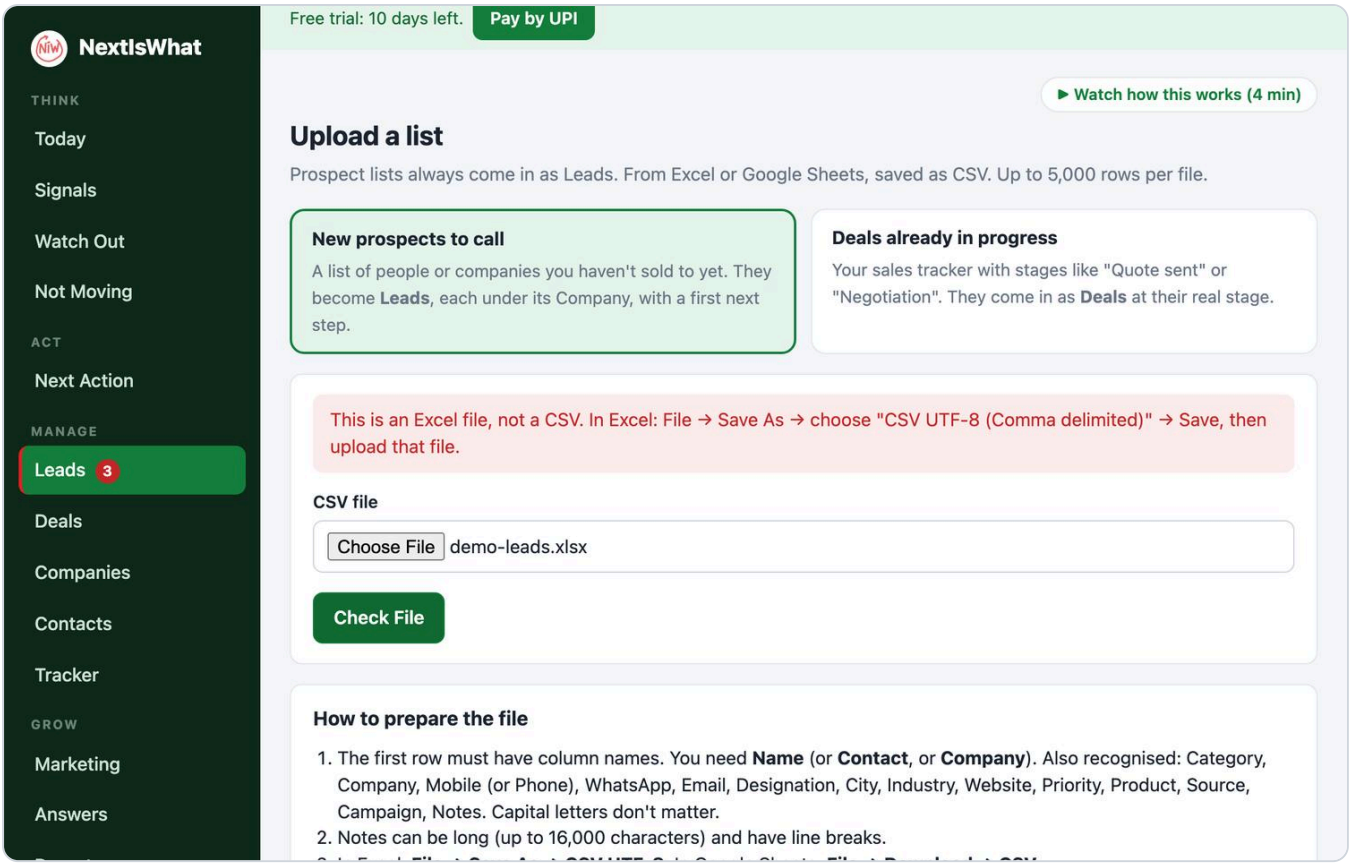
Nothing is saved until you click Import. Duplicates (same name and company) are skipped, so nothing is added twice.

Your new leads



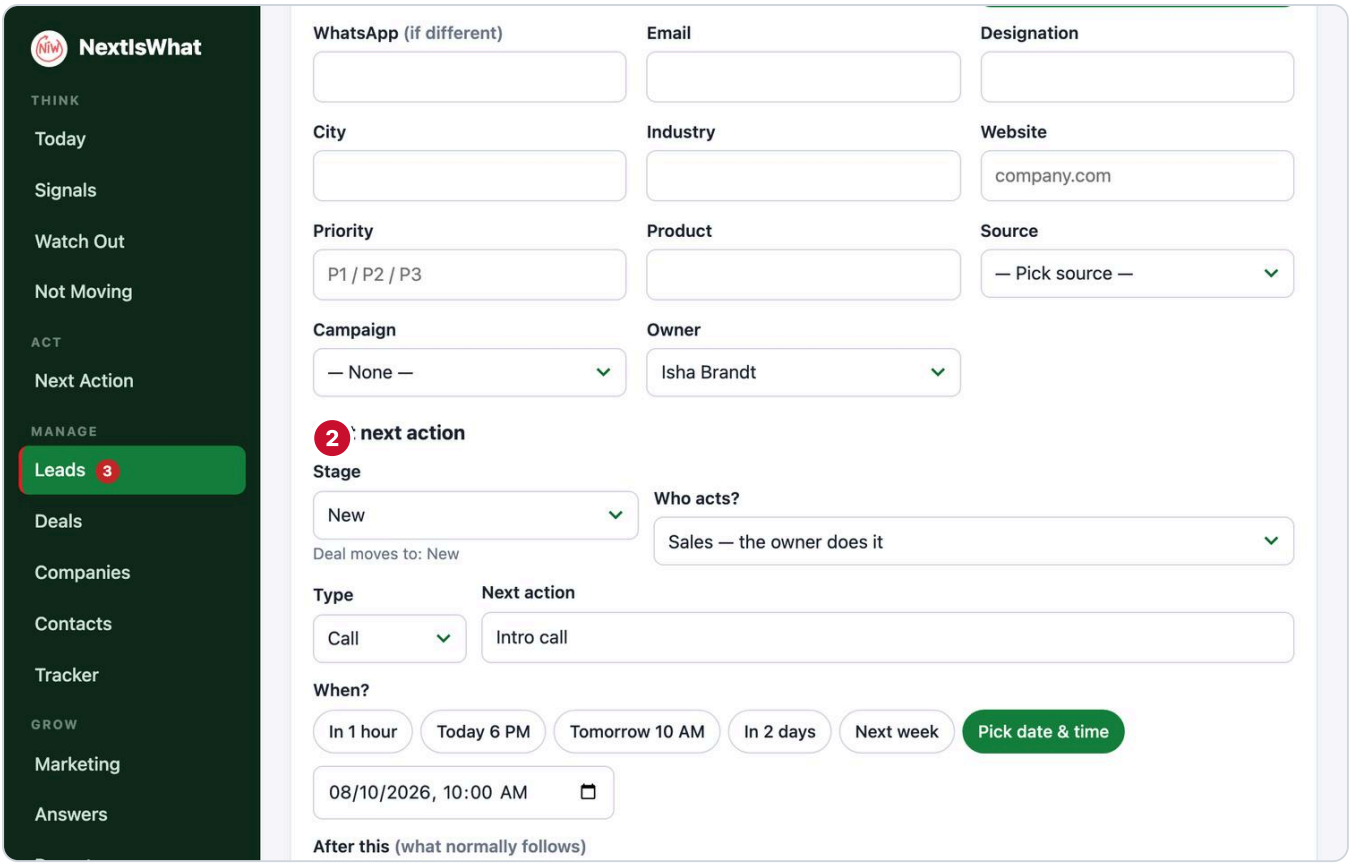
1 Your leads are in, each with an owner and a first next step.

Using Excel?



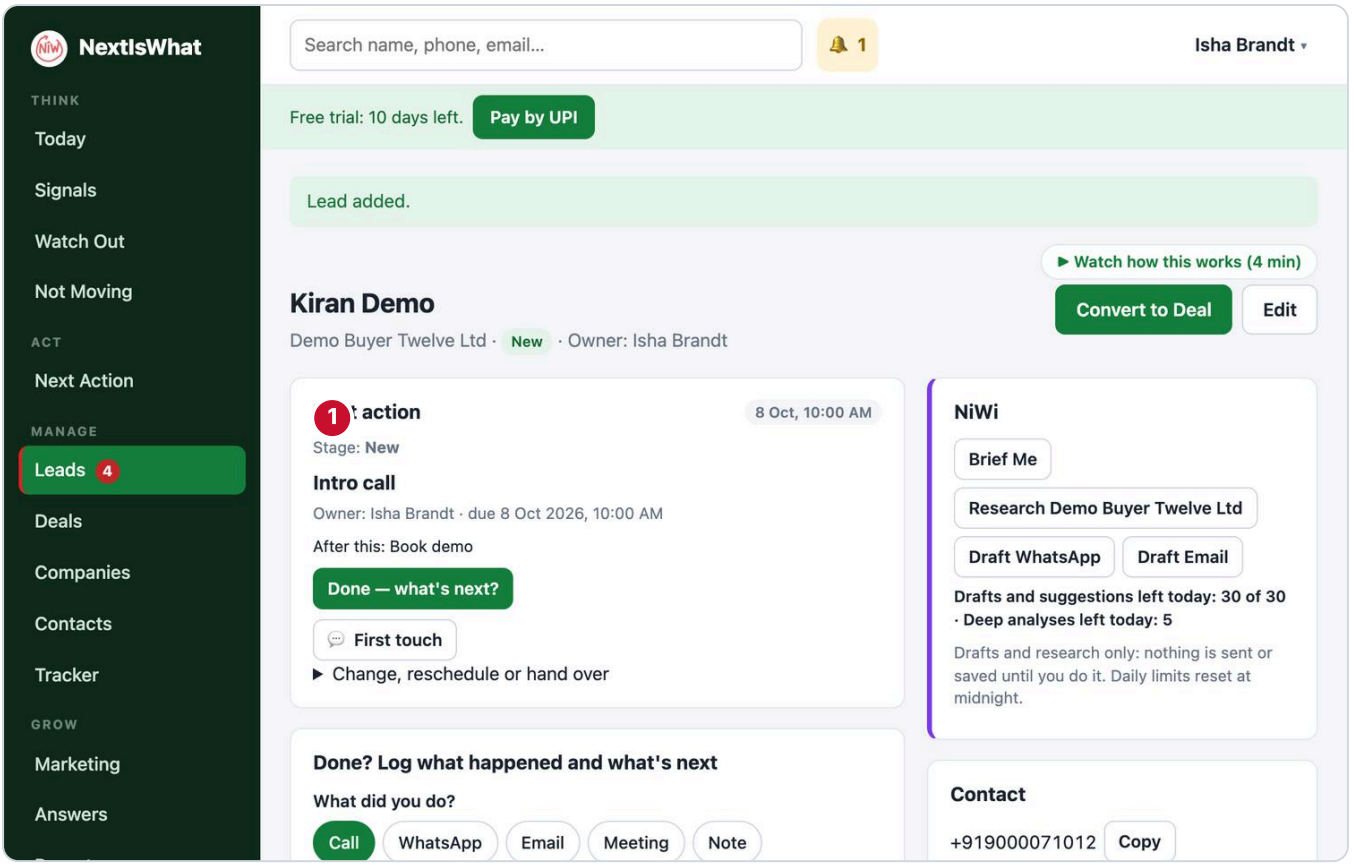
NIW reads CSV files. If you upload an Excel (.xlsx) file, NIW tells you how to save it as CSV: in Excel, File → Save As → CSV UTF-8 (Comma delimited) → Save. In Google Sheets: File → Download → CSV.

Add one lead by hand



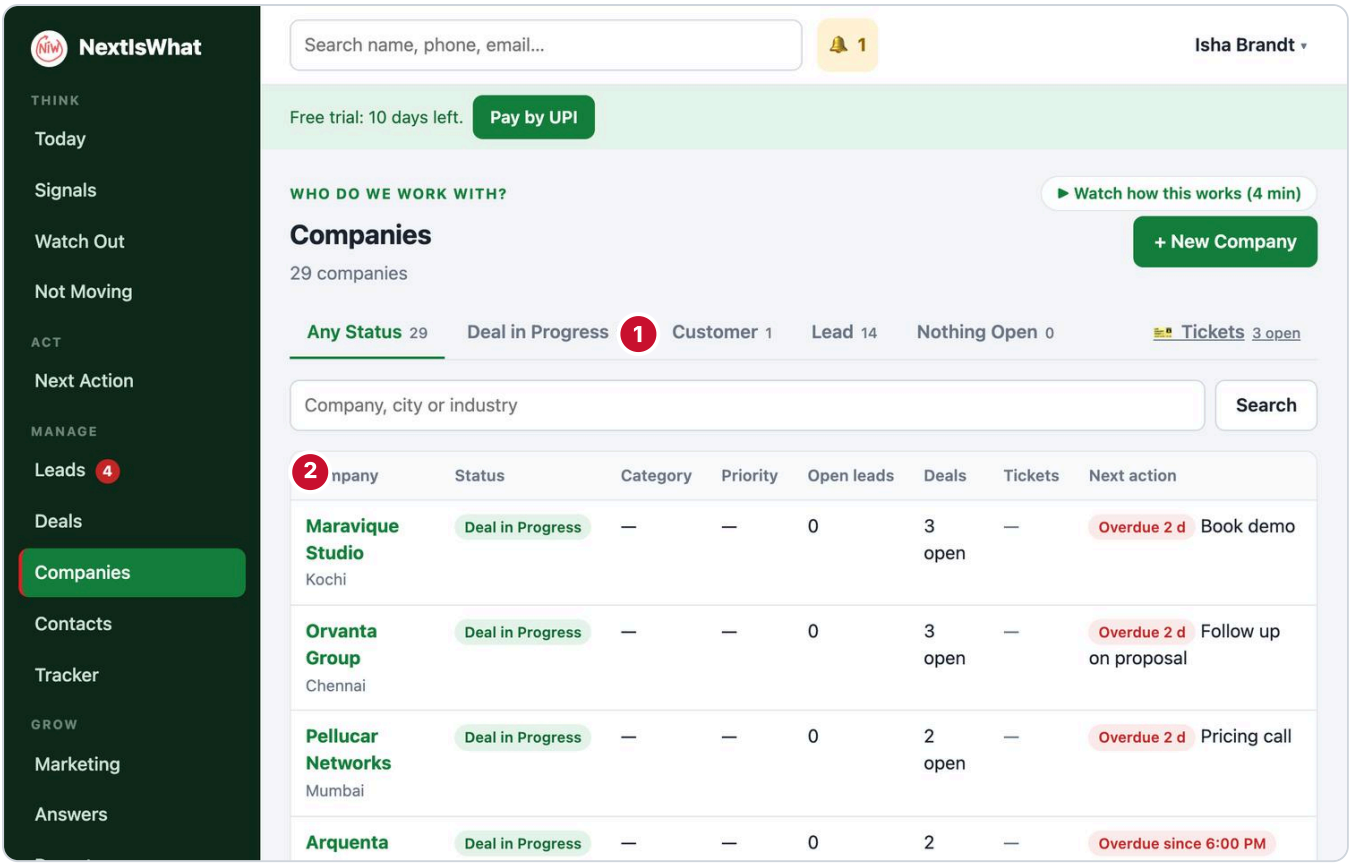
1. On Leads, click + New Lead and type the name, company and mobile.
2. Every new lead must have its first next action: what to do, and when (a call within one hour, by default).
3. Click Add Lead.

The lead's page



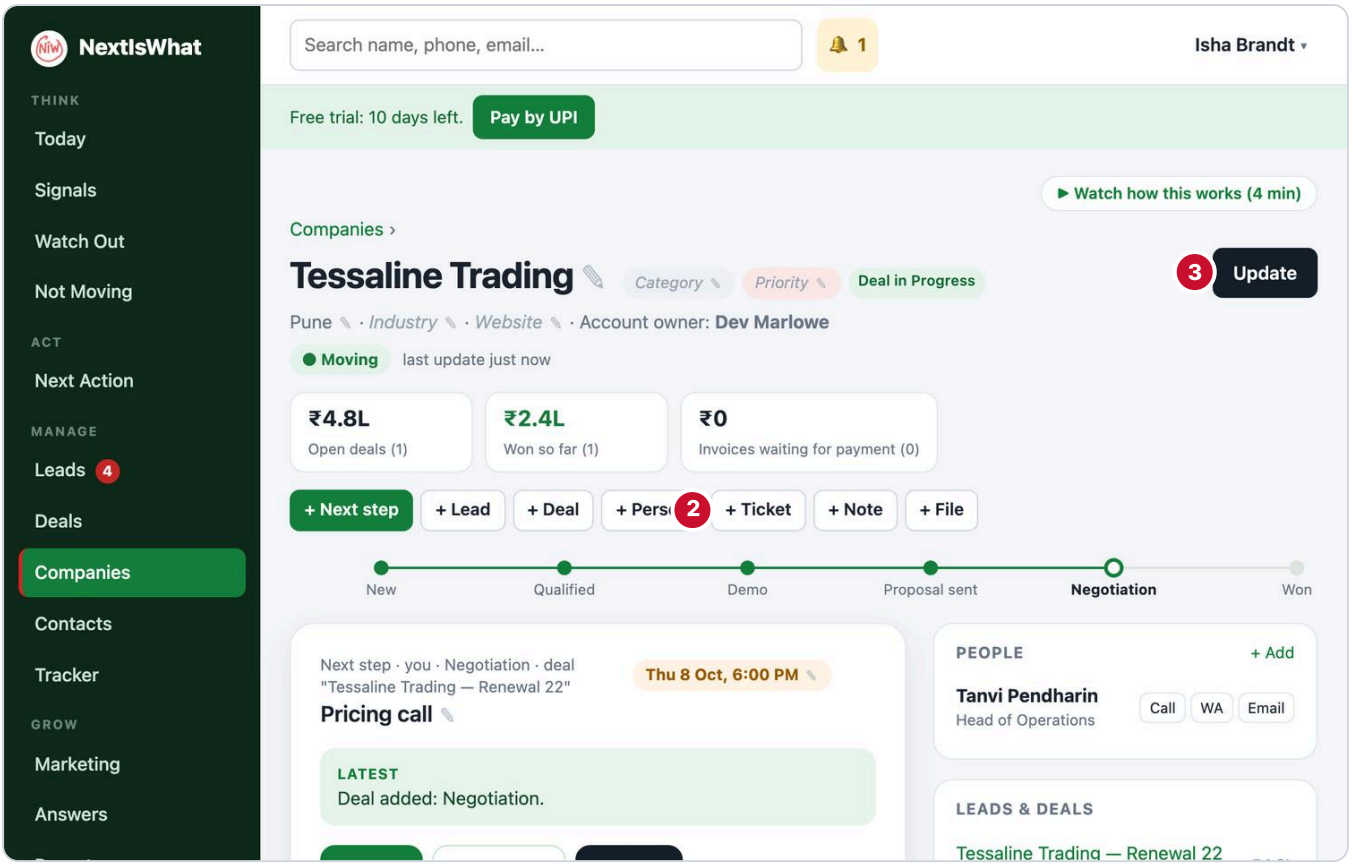
1 The next action is already set. Nothing waits without a next step.

Companies



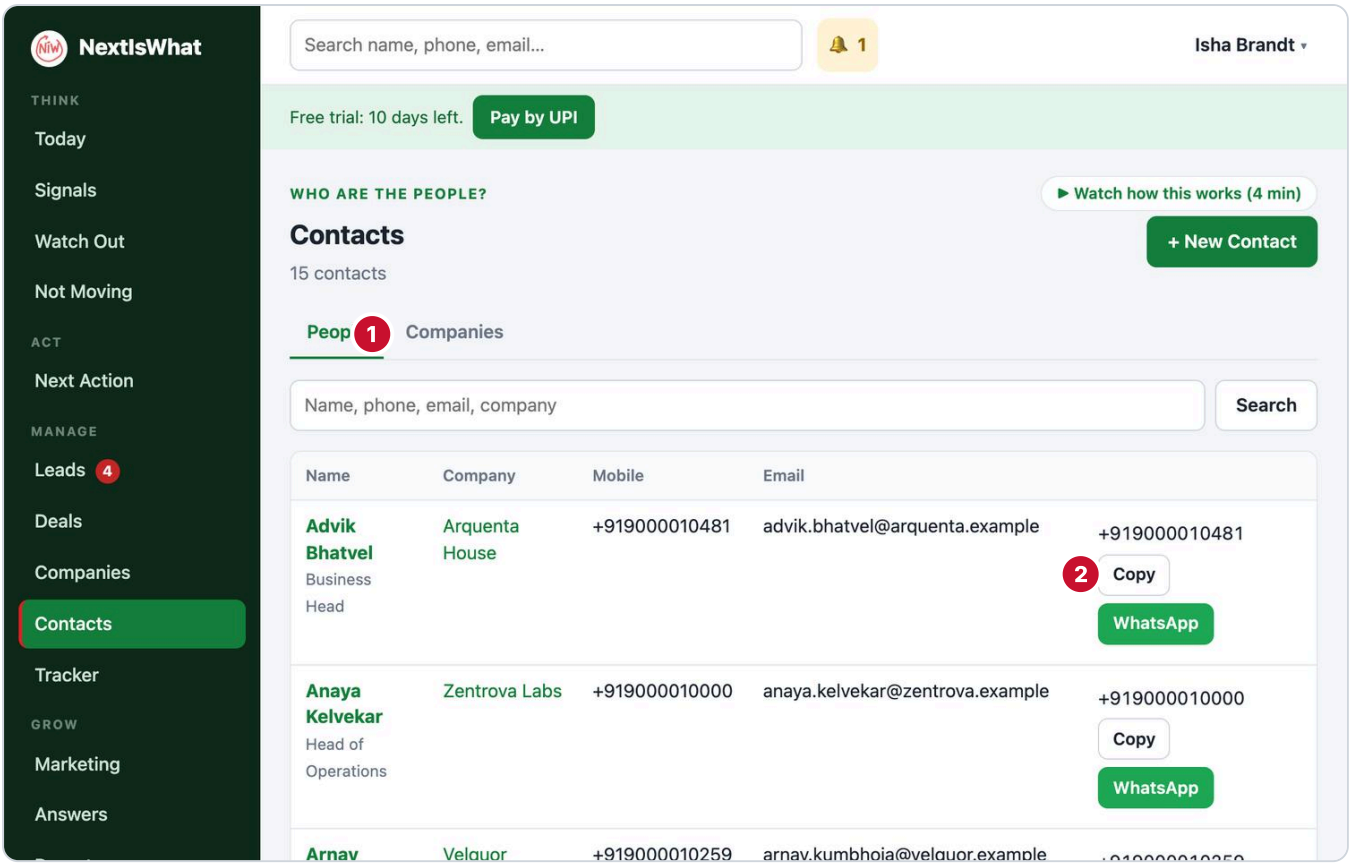
1. Every company is filed automatically. Tabs show the status: deal in progress, customer, lead, or nothing open.
2. Click a company to open it.

One company, everything in one place



1. History shows every call, message, note and change for this company.
2. Add a lead, deal, person, service ticket, note or file from these buttons.
3. Update logs what happened and sets the next step.

Contacts



1. Switch between People and Companies.
2. Copy a number or open WhatsApp straight from the list.

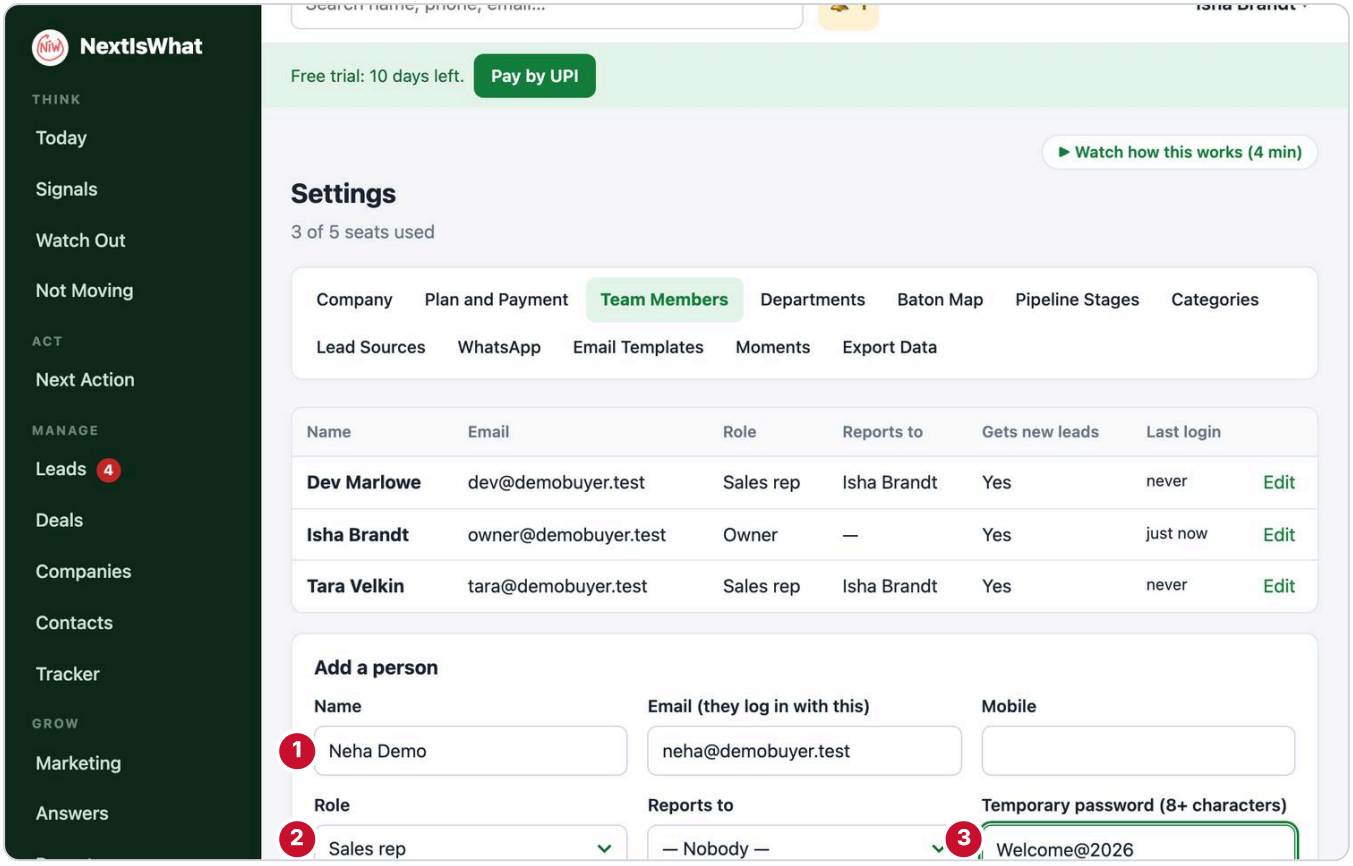
STEP 3

Invite your team

Why this matters. Each person gets their own list. Salespeople see their own customers; managers see their team.

> **Tip** Only the owner sees Settings. If your team is new to this kind of tool, keep Simple mode on for the first weeks.

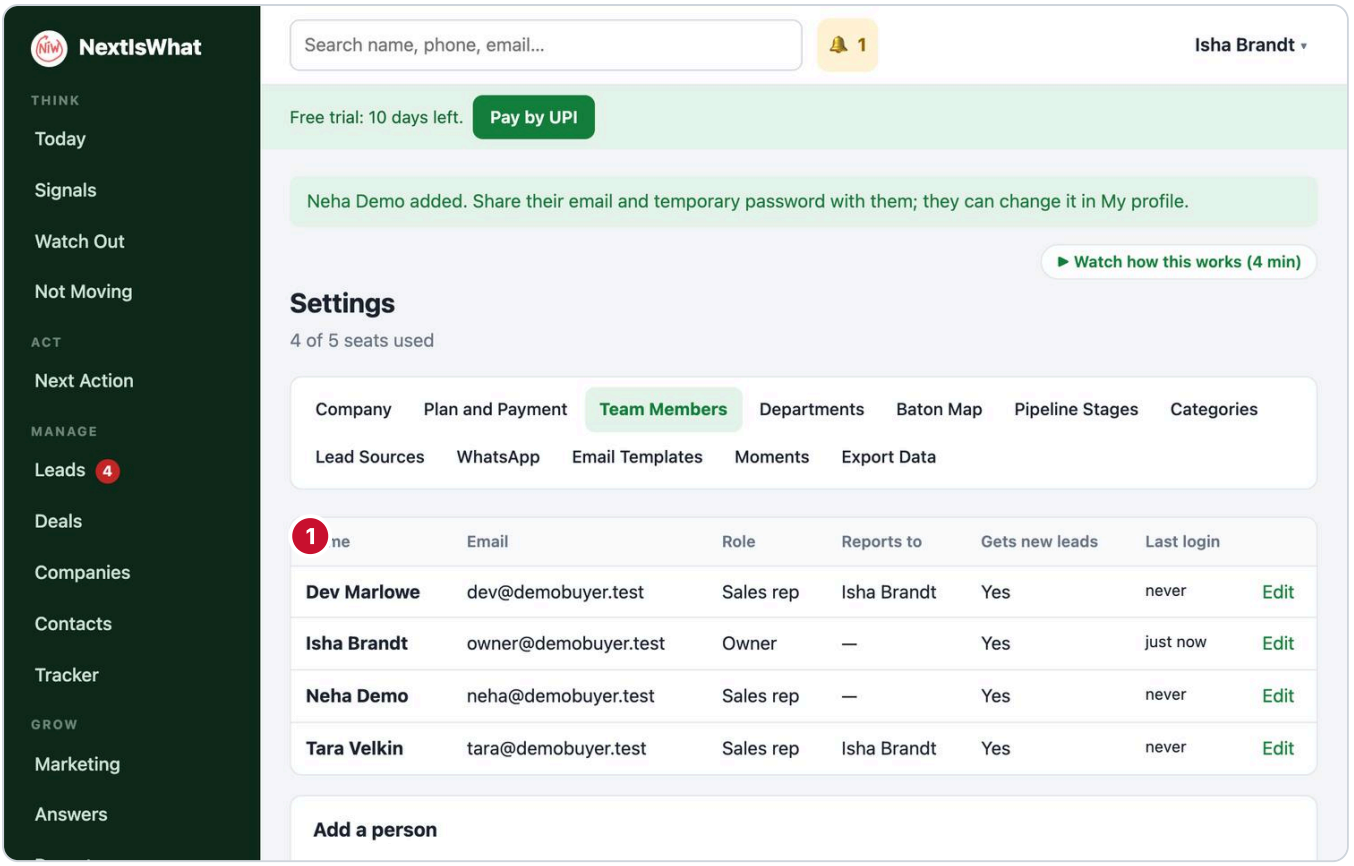
Settings → Team Members



1. Type your colleague's name and work email.
2. Choose their role: Sales rep or Manager.
3. Give them a temporary password.
4. Click Add Person.

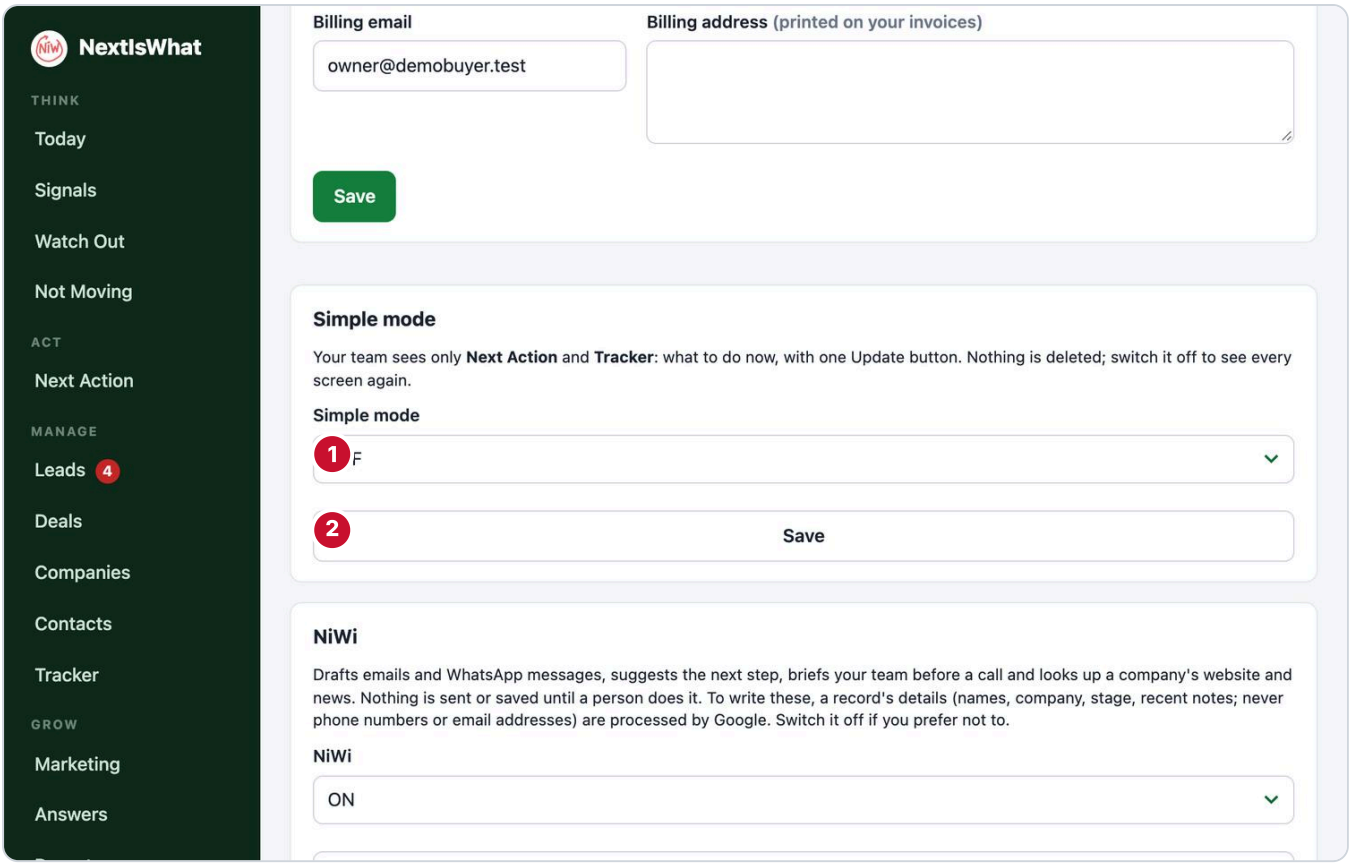
NIW does not send an invitation email. Share the email and temporary password with your colleague yourself; they can change the password in My Profile.

Your team



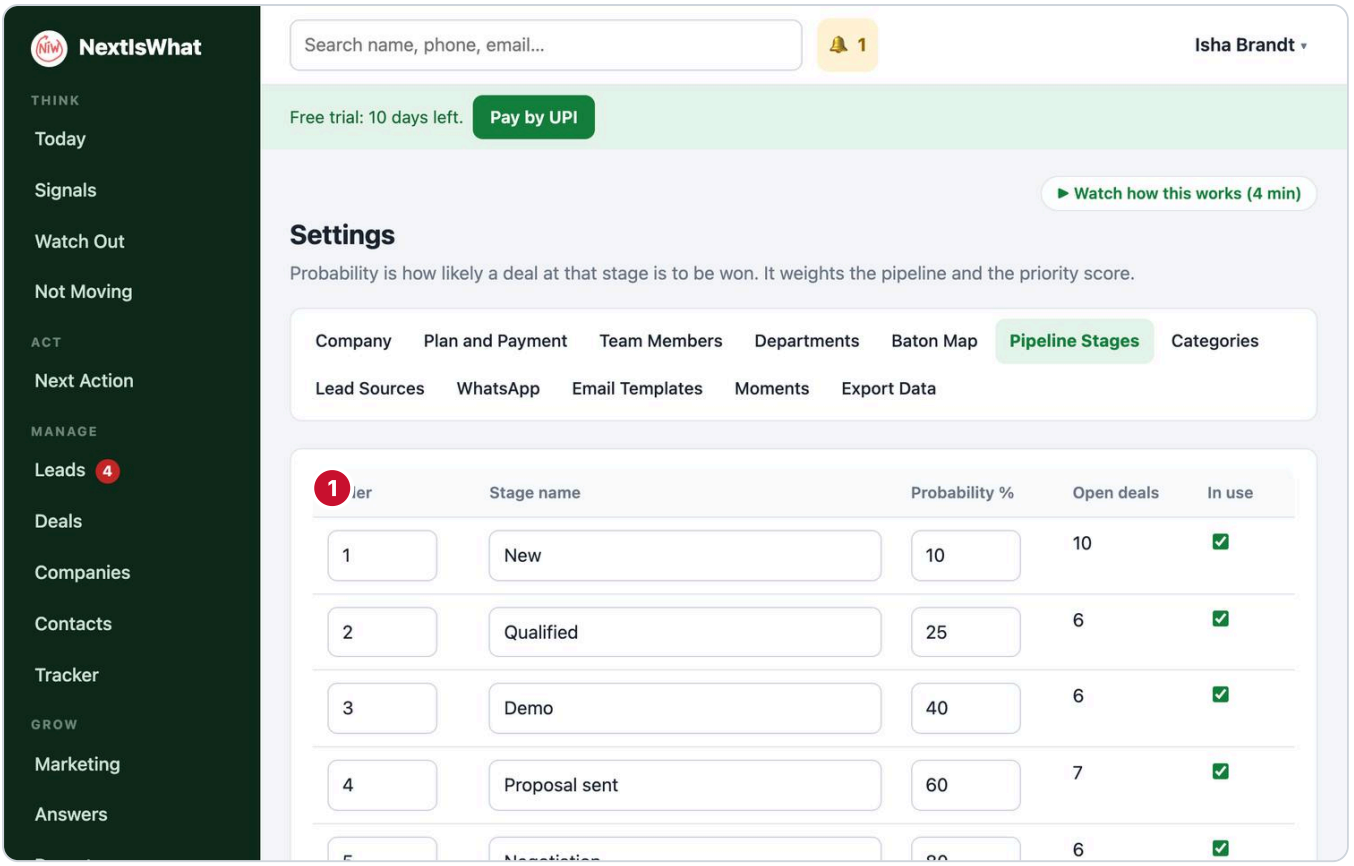
1 Everyone in your team, their role, who they report to, and whether they get new leads in turn.

Simple mode



1. Simple mode shows your team only Next Action and the Tracker, with one Update button. Choose On or Off.
2. Click Save.

Settings → Pipeline Stages



1 Your deal stages, each with its chance of winning. Rename them, change the order, or add your own.

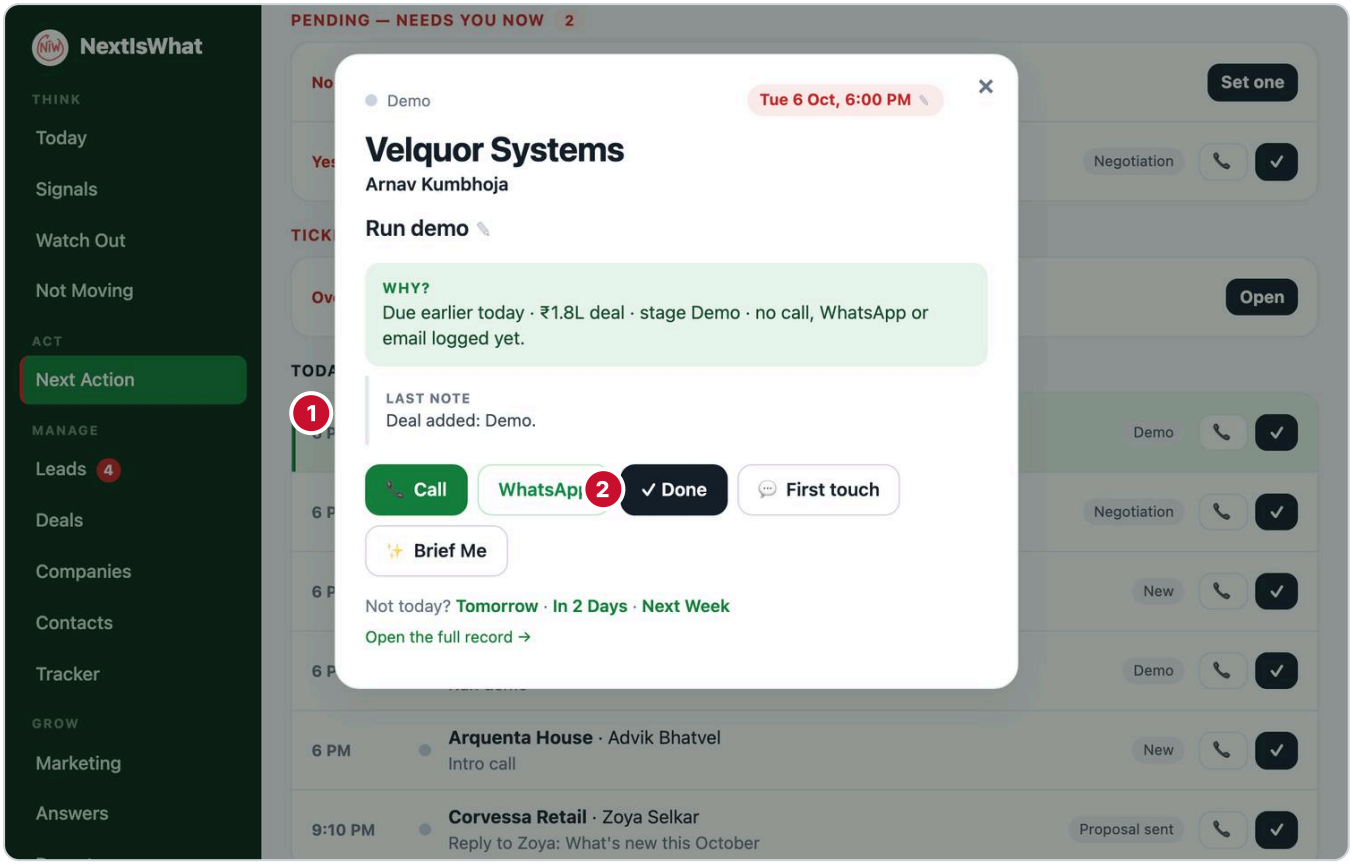
STEP 4

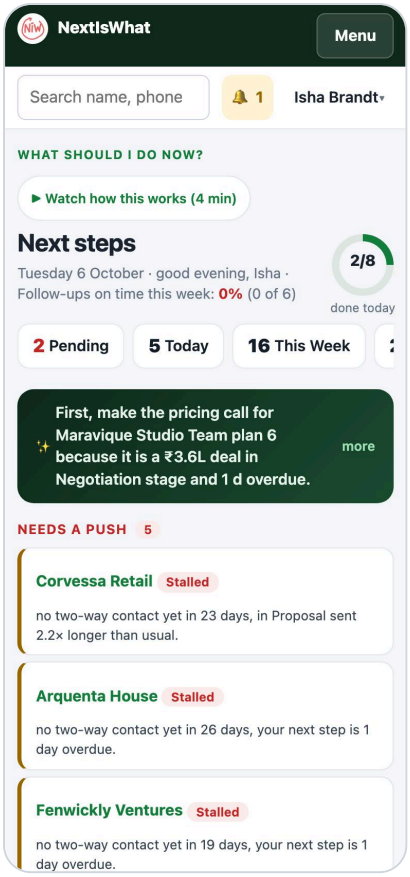
4 Your daily routine: Next Action and Update

Why this matters. One list tells each person what to do today. After every call, one tap records it and sets what's next.

> **Tip** Not today? On the card, click Tomorrow, In 2 Days or Next Week. The same step moves; nothing is lost.

Next Action



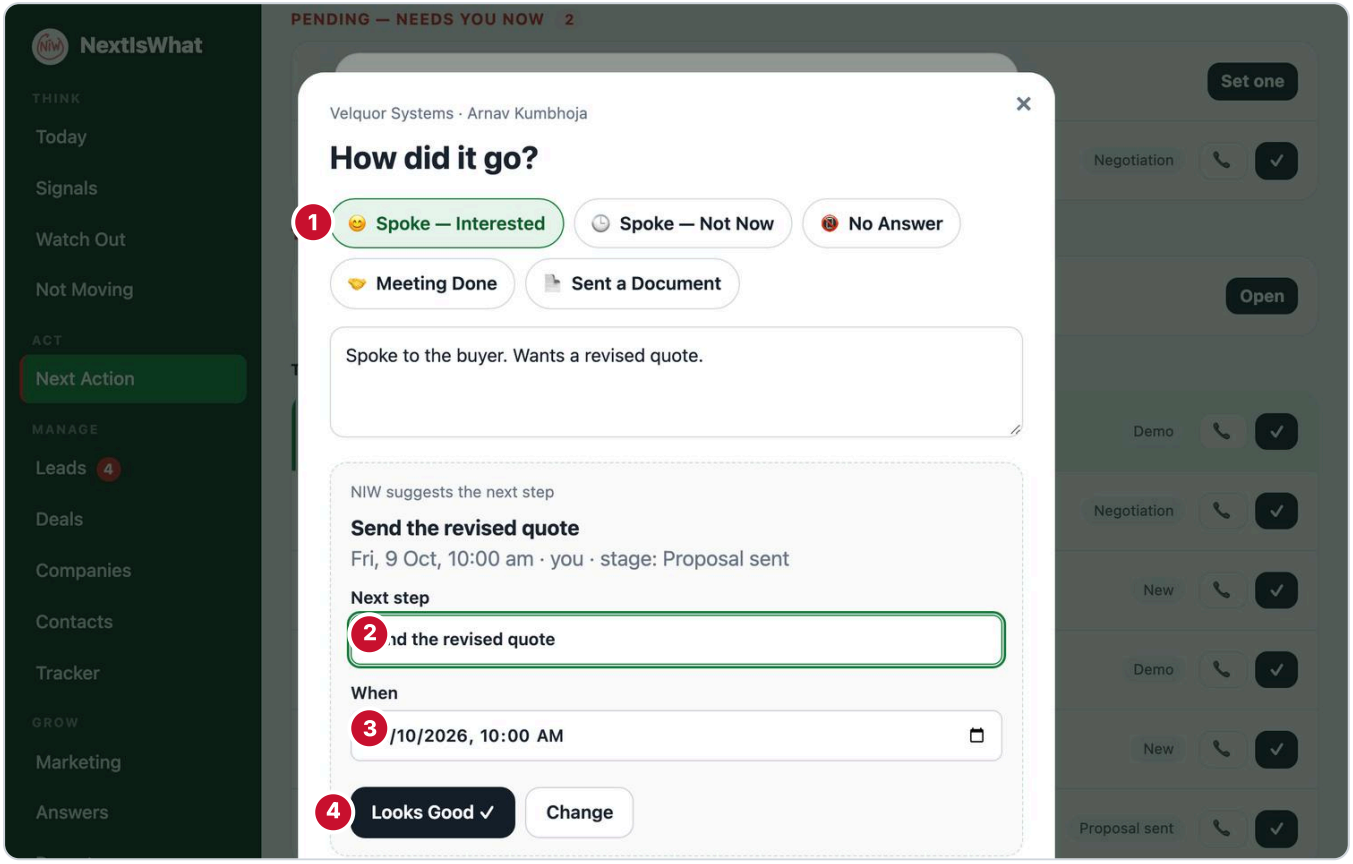


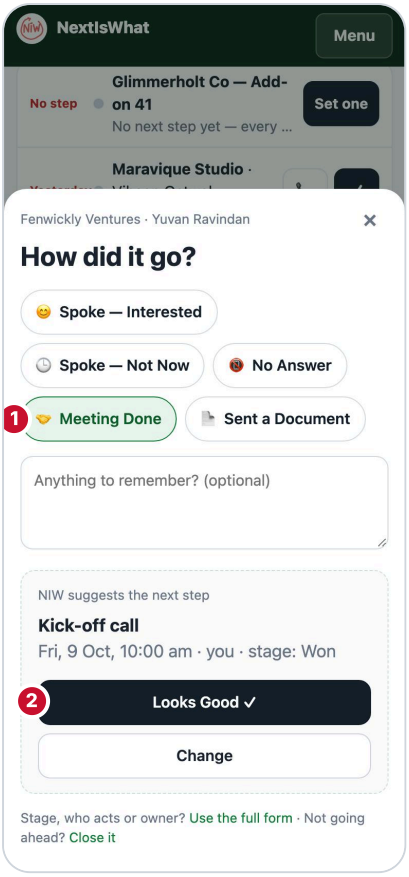
On a phone

1. Click a row to open its card on the right.
2. When you've done it, click Done.

At the top, Pending, Today, This Week and Waiting on Others show how many steps are in each part of your list; click one to jump there. On a phone (left), tap the tick on a row instead.

How did it go? What's next?

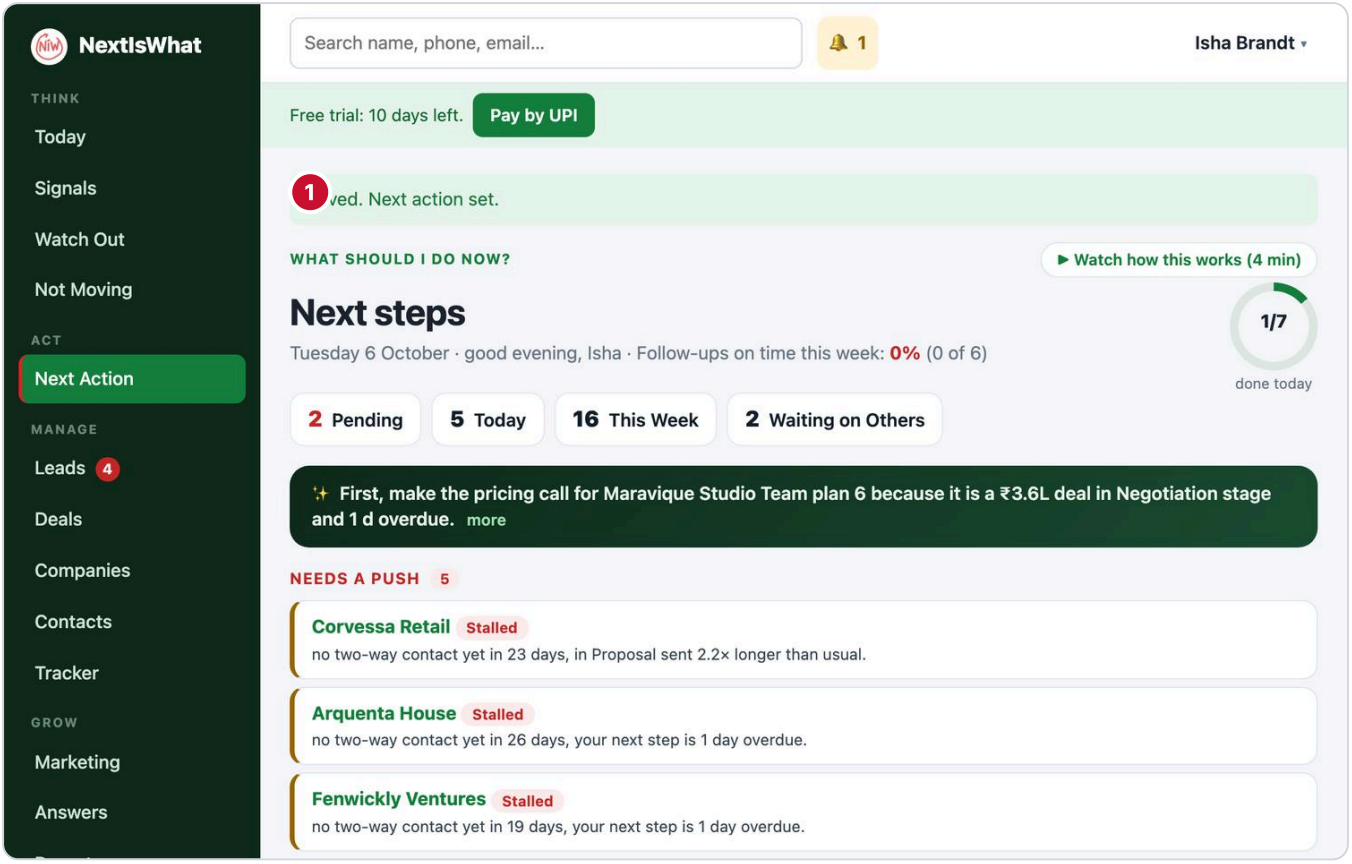




On a phone

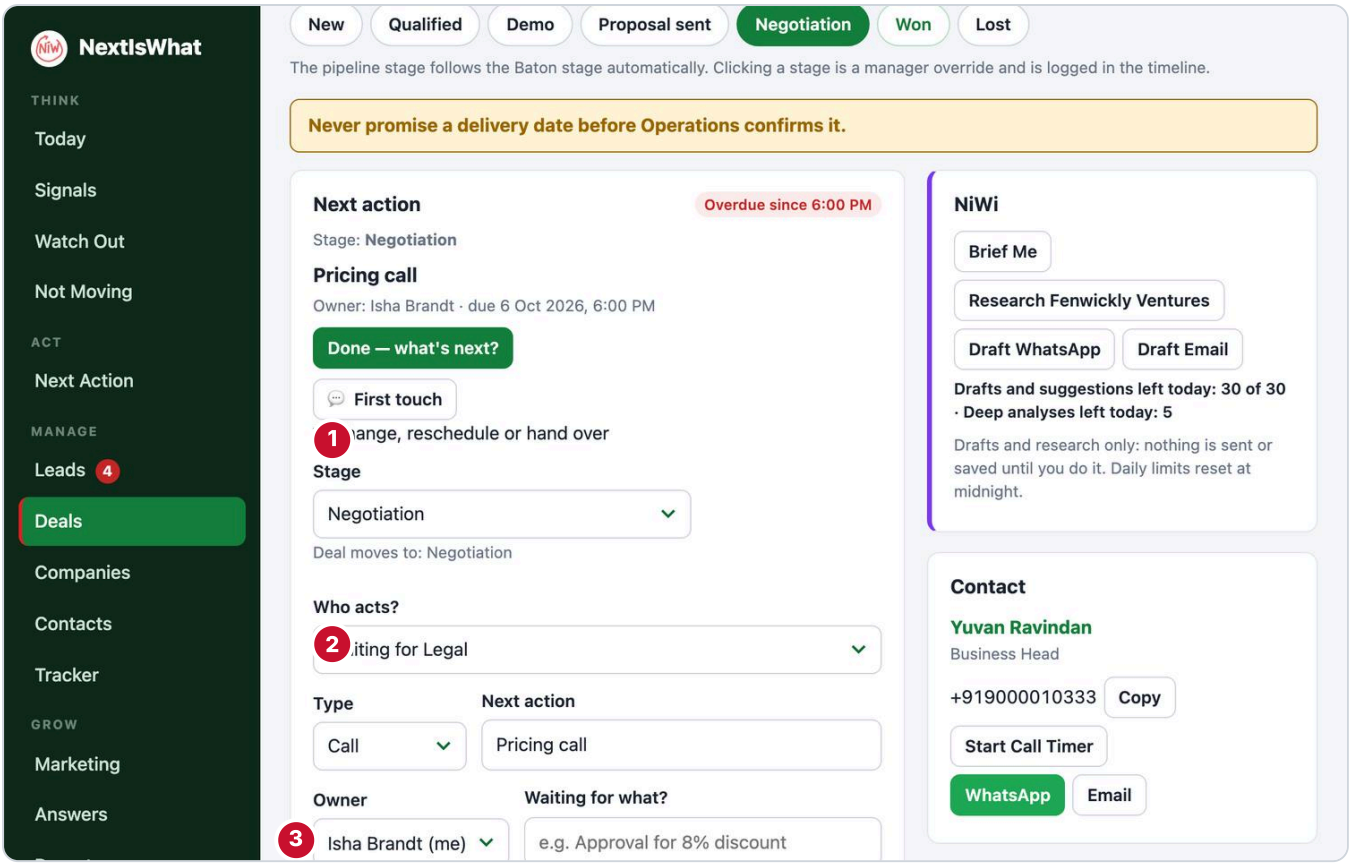
1. Pick what happened.
2. NIW suggests the next step. Click Change to type your own.
3. Check the date and time it is due.
4. Click Looks Good.

Saved



1. Saved. The old step is closed and the new one is on your list, on the right date.

Waiting for someone else



1. On the customer's page, open Change, reschedule or hand over.
2. Who acts? Choose Waiting for (for example Legal or the customer). The step stays yours, with a follow-up date.
3. To hand it to a colleague, choose them as the owner.

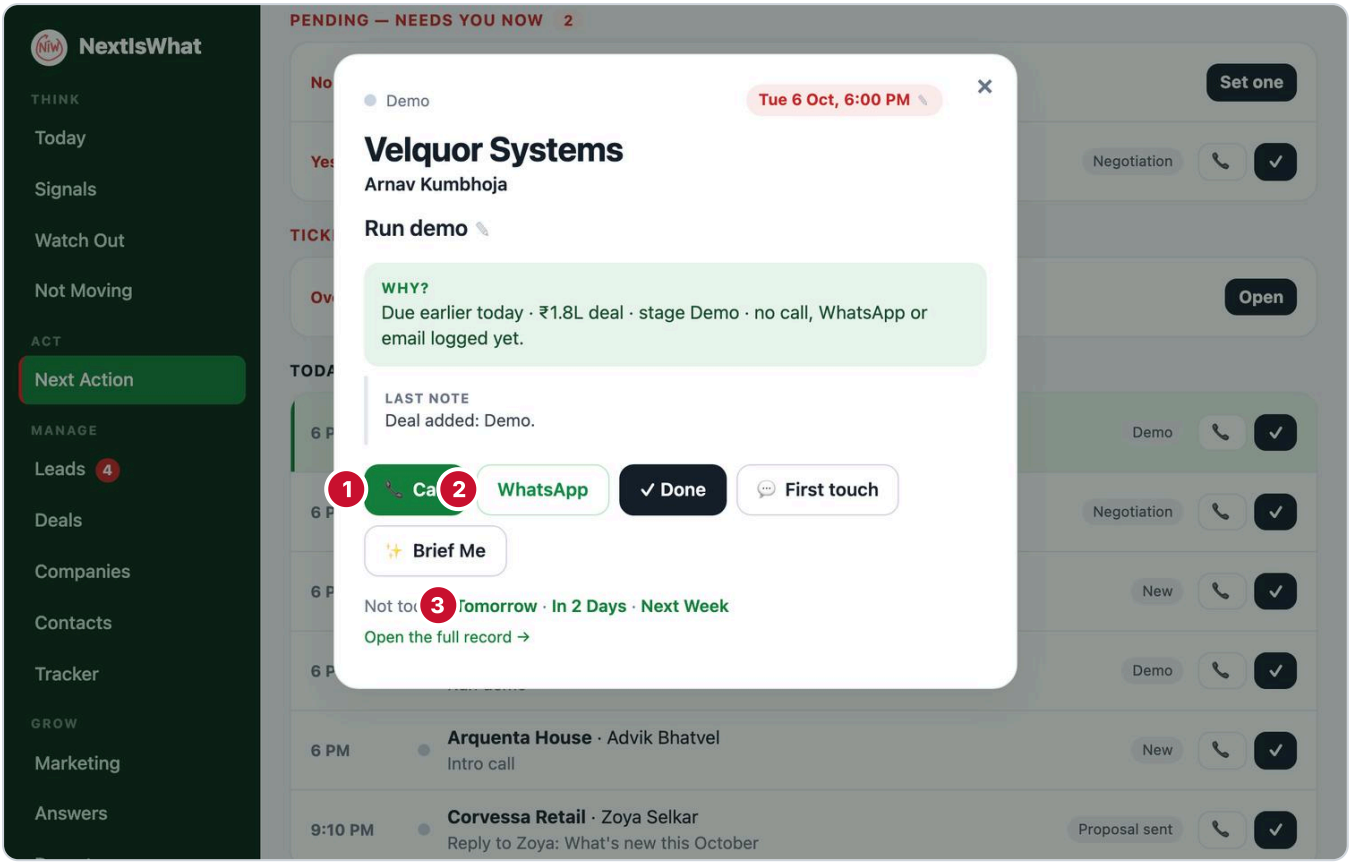
STEP 5

5 Call and WhatsApp from NIW

Why this matters. No copying numbers. Every call and message is one tap, and gets recorded.

> **Tip** On a customer's page, the WhatsApp button also has ready messages, like a follow-up or a payment reminder.

On every card



1. Call: on a phone, your phone dials the customer. On a computer, you see the number with a Copy button and a call timer.
2. WhatsApp opens a chat with the customer's number filled in.
3. Not today? Move the step to tomorrow, in 2 days, or next week.

When you come back after a call on your phone, NIW asks how the call went, with the time you spoke already filled in.

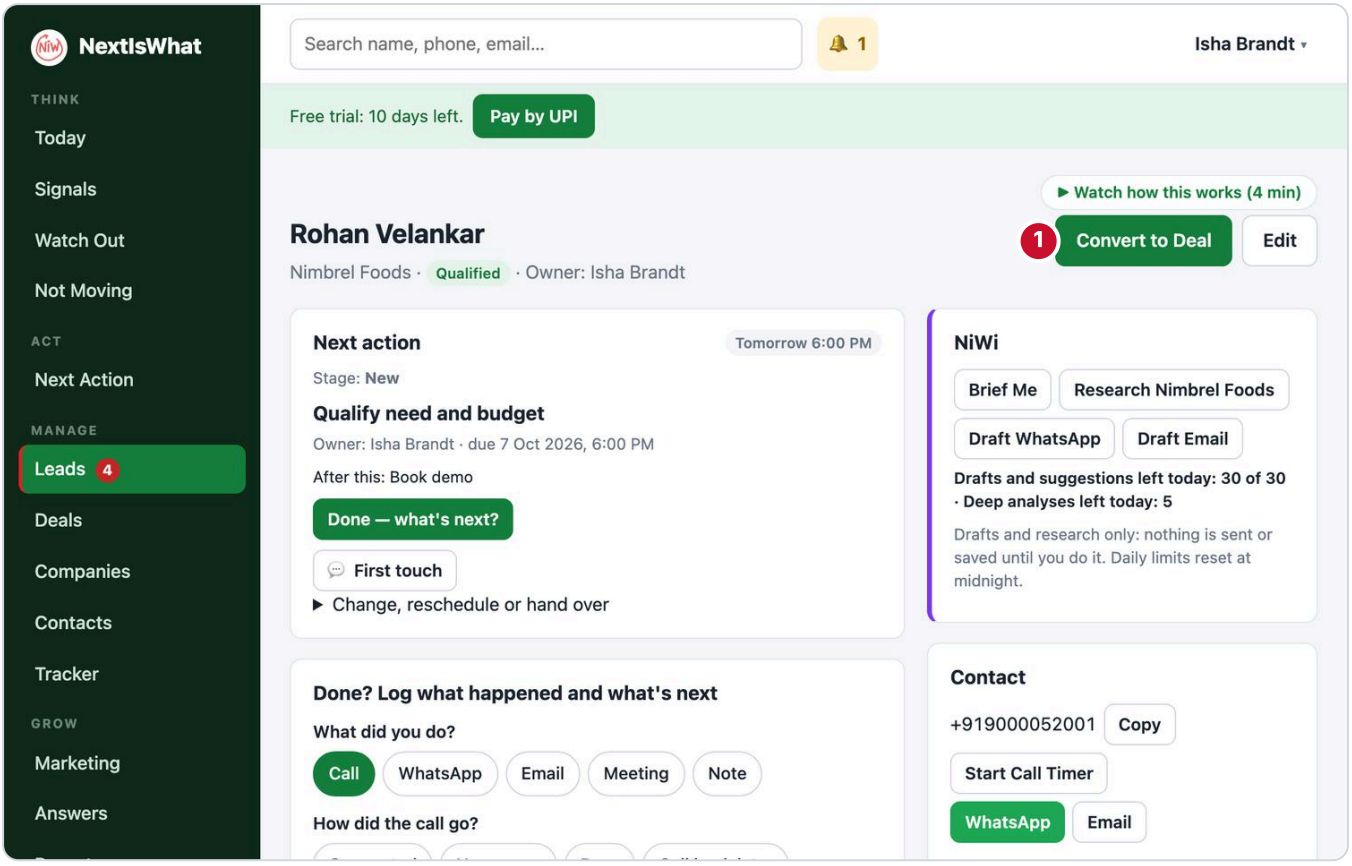
STEP 6

6 Turn leads into deals

Why this matters. When a lead is ready to buy, it becomes a deal with a value, so you can see your pipeline.

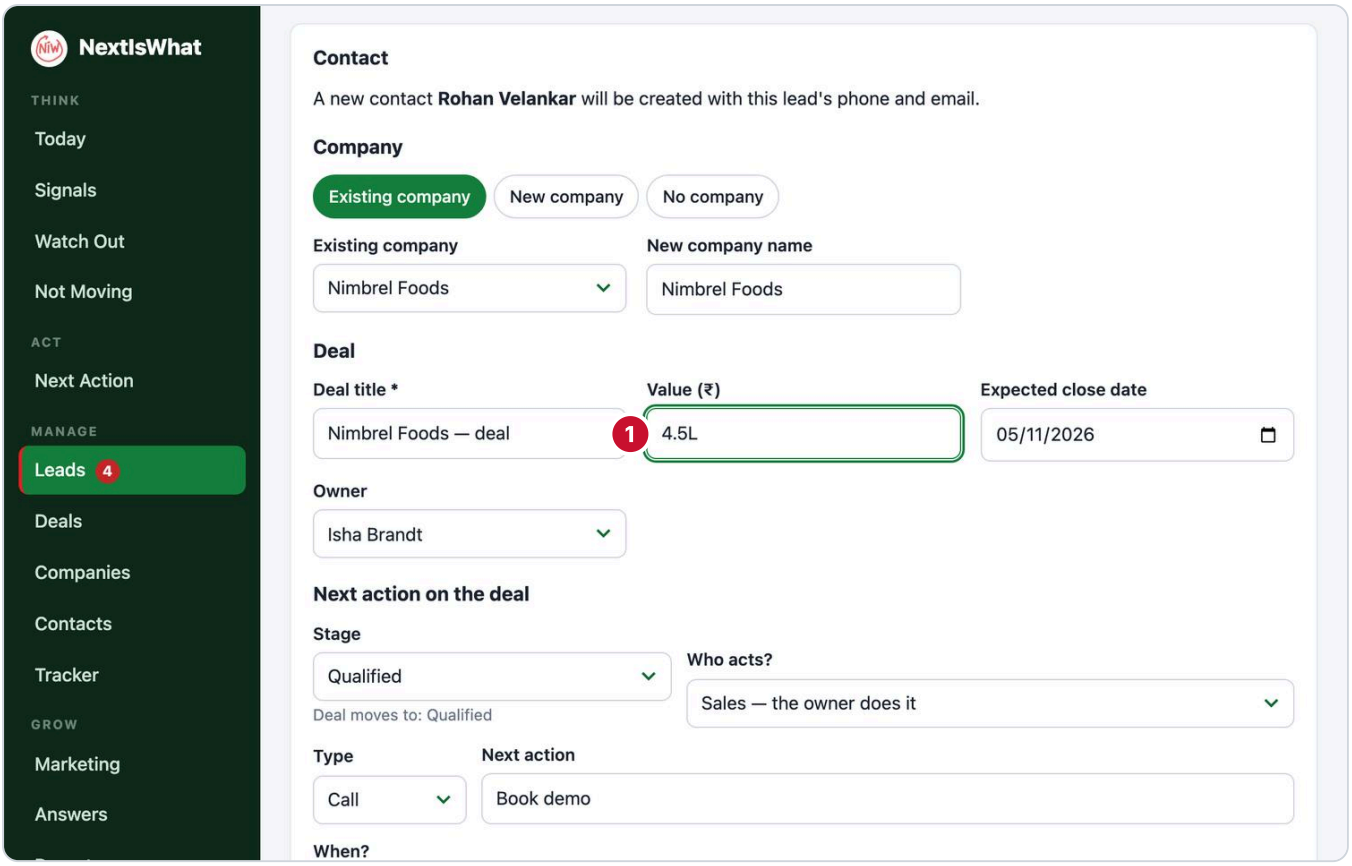
> **Tip** Use the Hot leads list on Leads to call the best leads first.

A hot lead



1. Click Convert to Deal.
2. Why this lead is hot: NIW scores every lead out of 100 and shows the reasons.

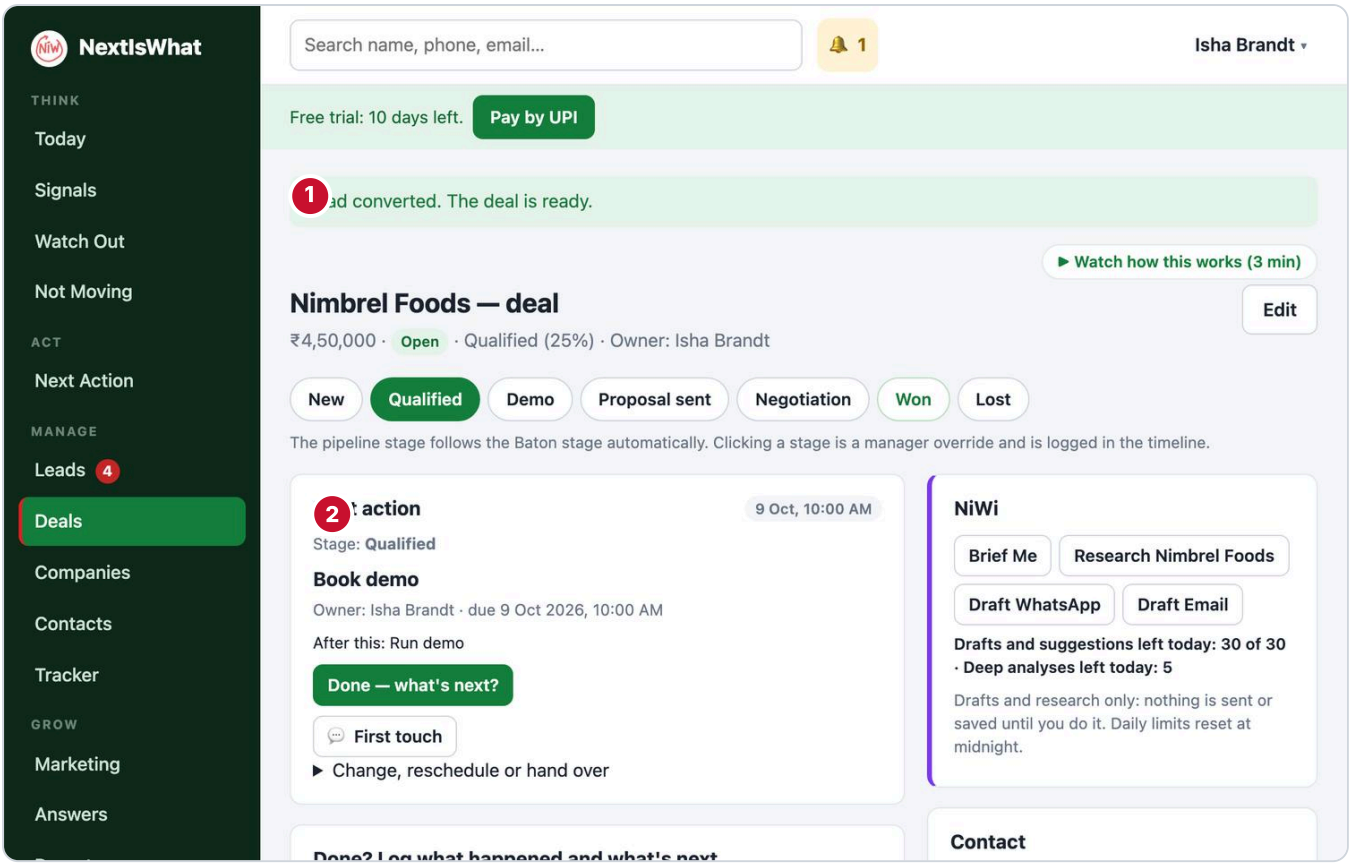
Convert



1. Type the value, for example 4.5L.
2. Click Convert.

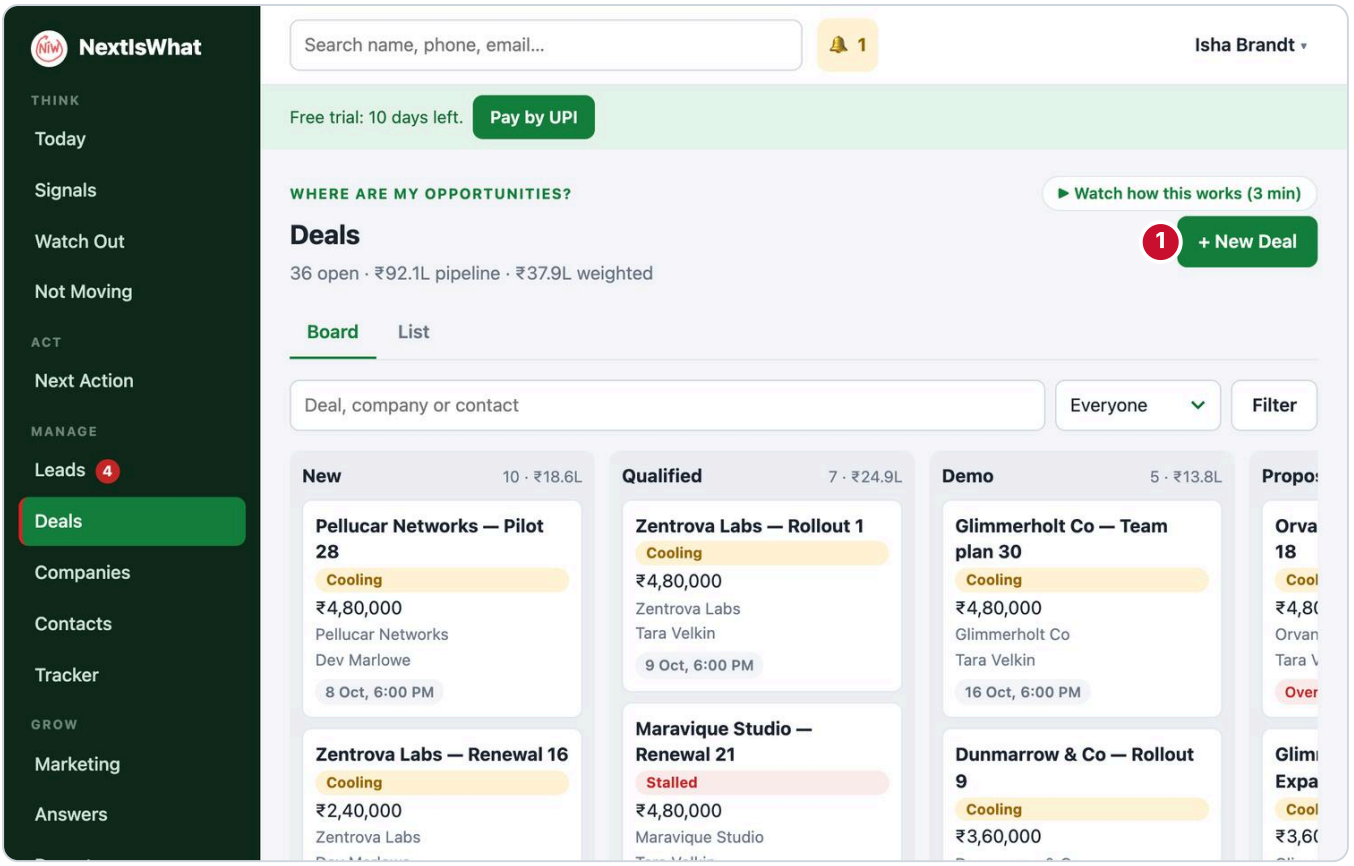
NIW creates the contact, the company and the deal, and carries over the source. The first next step is filled in for you.

The deal



1. Your deal is ready.
2. Its next step.
3. Share a plan with the buyer (Step 7).

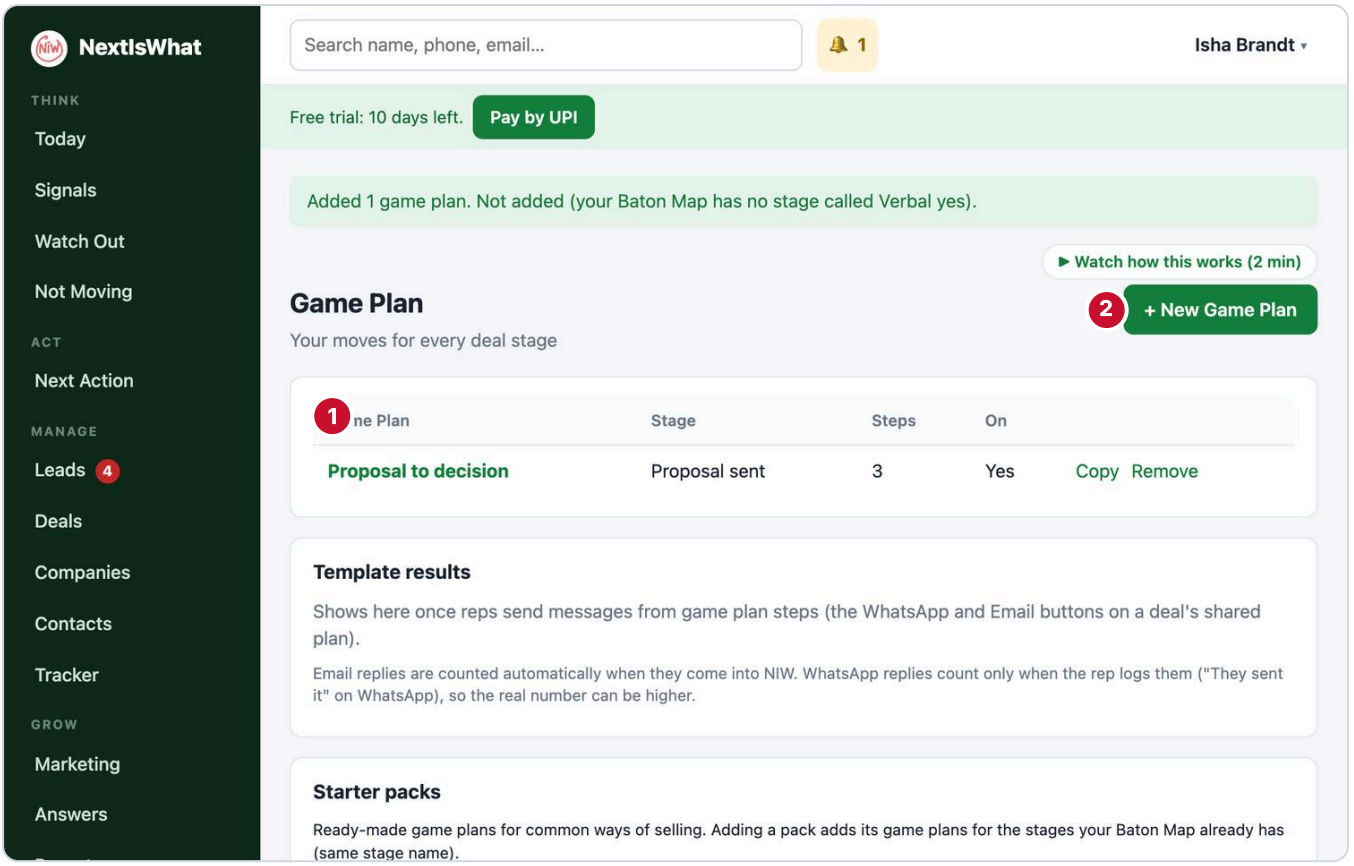
Deals



1 All deals by stage, with values. Click + New Deal to add one directly.

The stage moves when you finish steps, so your board stays true without extra work.

Game Plan (managers)



1. A game plan lists the steps for a deal stage, for you and for the buyer.
2. Start from a ready pack for how you sell, or click + New Game Plan.

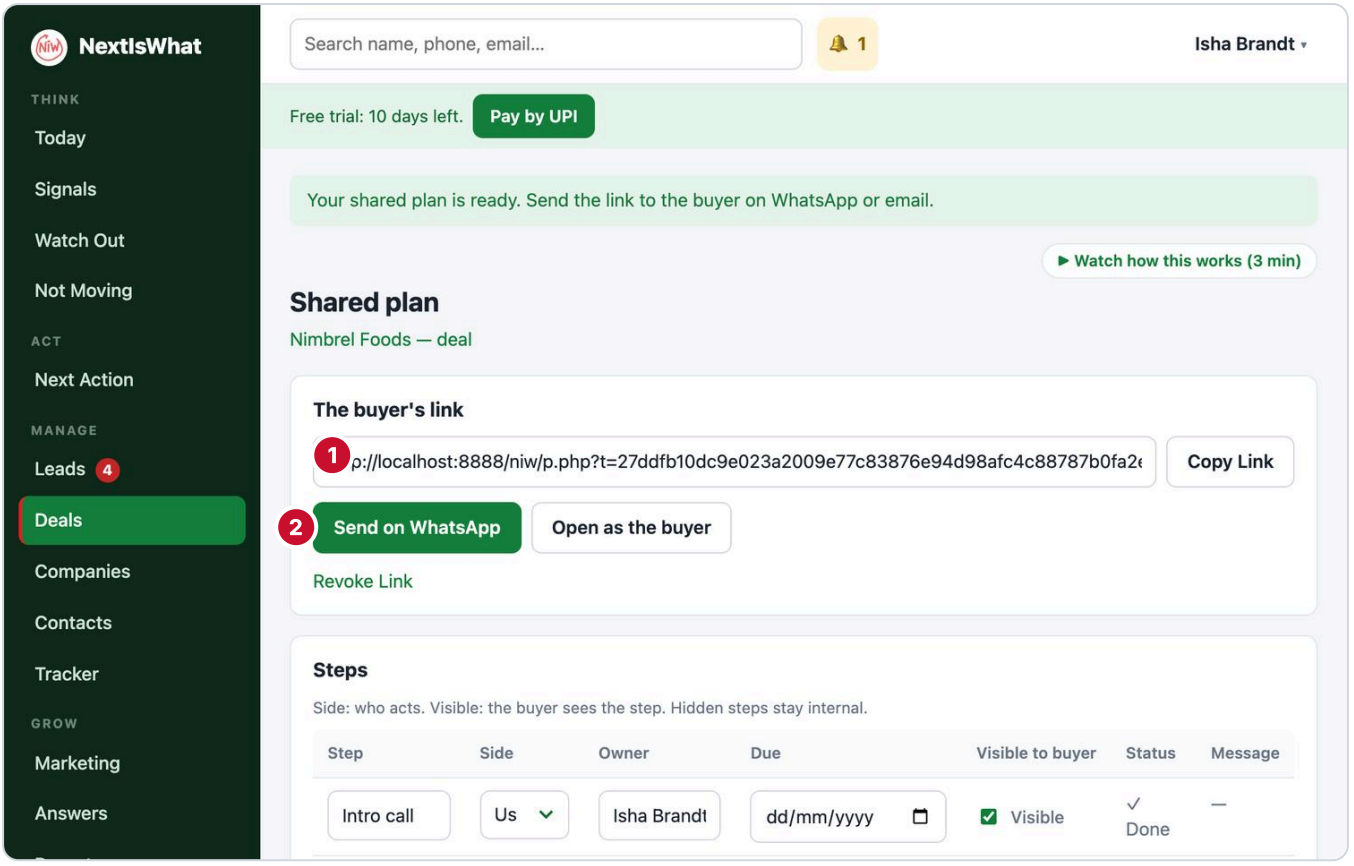
STEP 7

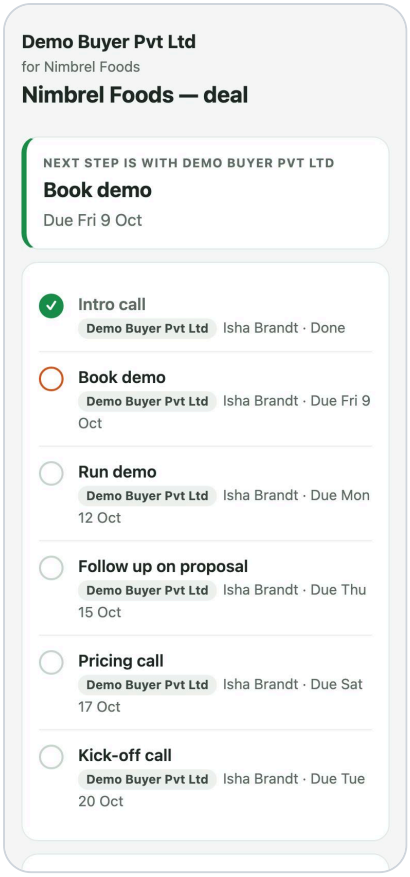
Share a Deal Plan with your buyer

Why this matters. Buyers forget their own steps. A shared plan keeps both sides moving, without a login.

> **Tip** Open the deal and click Share Plan to create the link. Edit the steps and dates any time.

Shared plan





On a phone

1. The buyer's link. Copy it, or
2. send it on WhatsApp.

The phone picture shows what your buyer sees. They can mark their steps done, ask for a new date, add a file or leave a comment. They never see the deal value or your notes.

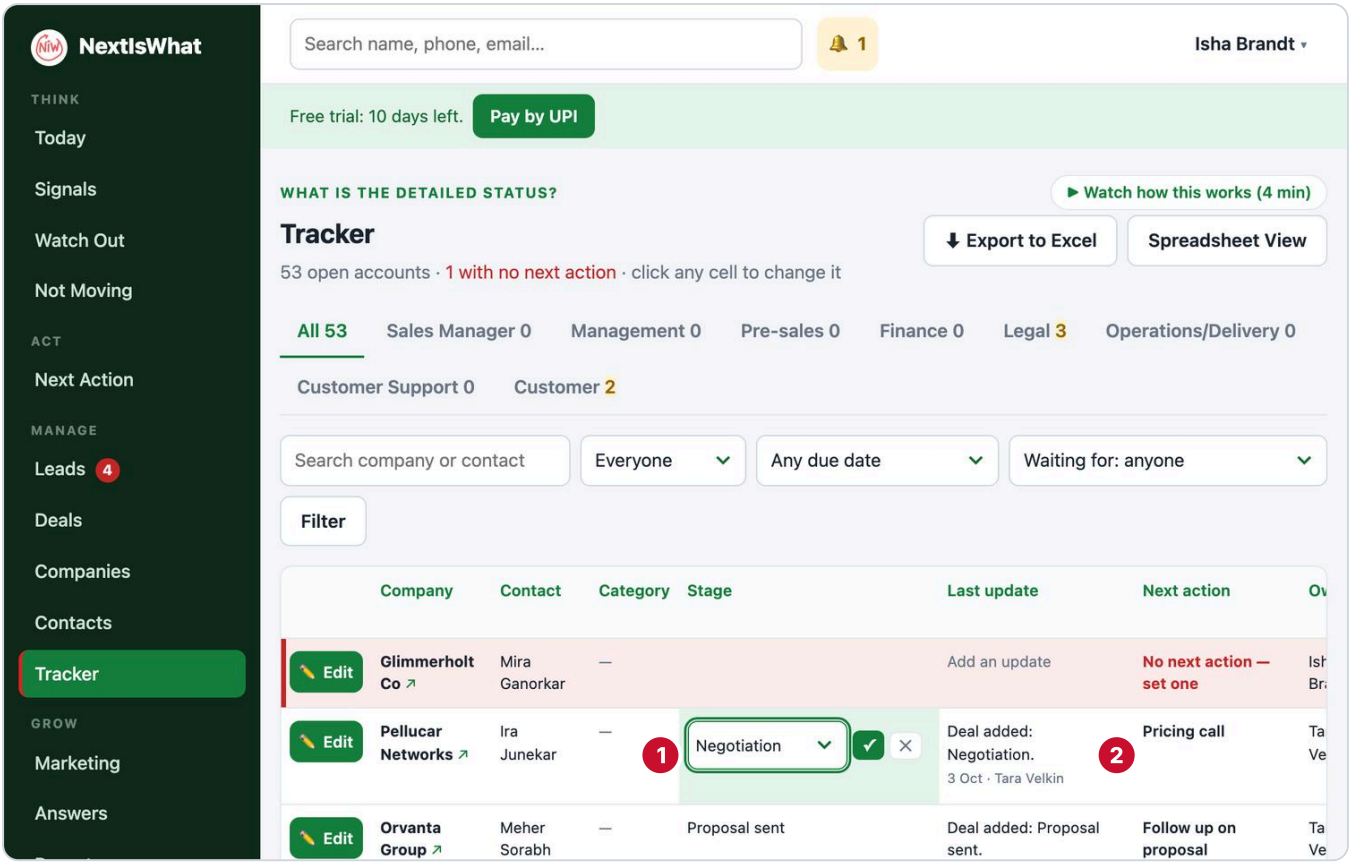
STEP 8

8 Keep your Tracker up to date

Why this matters. The Tracker is your whole pipeline in one table, just like your old spreadsheet, but it updates your lists for you.

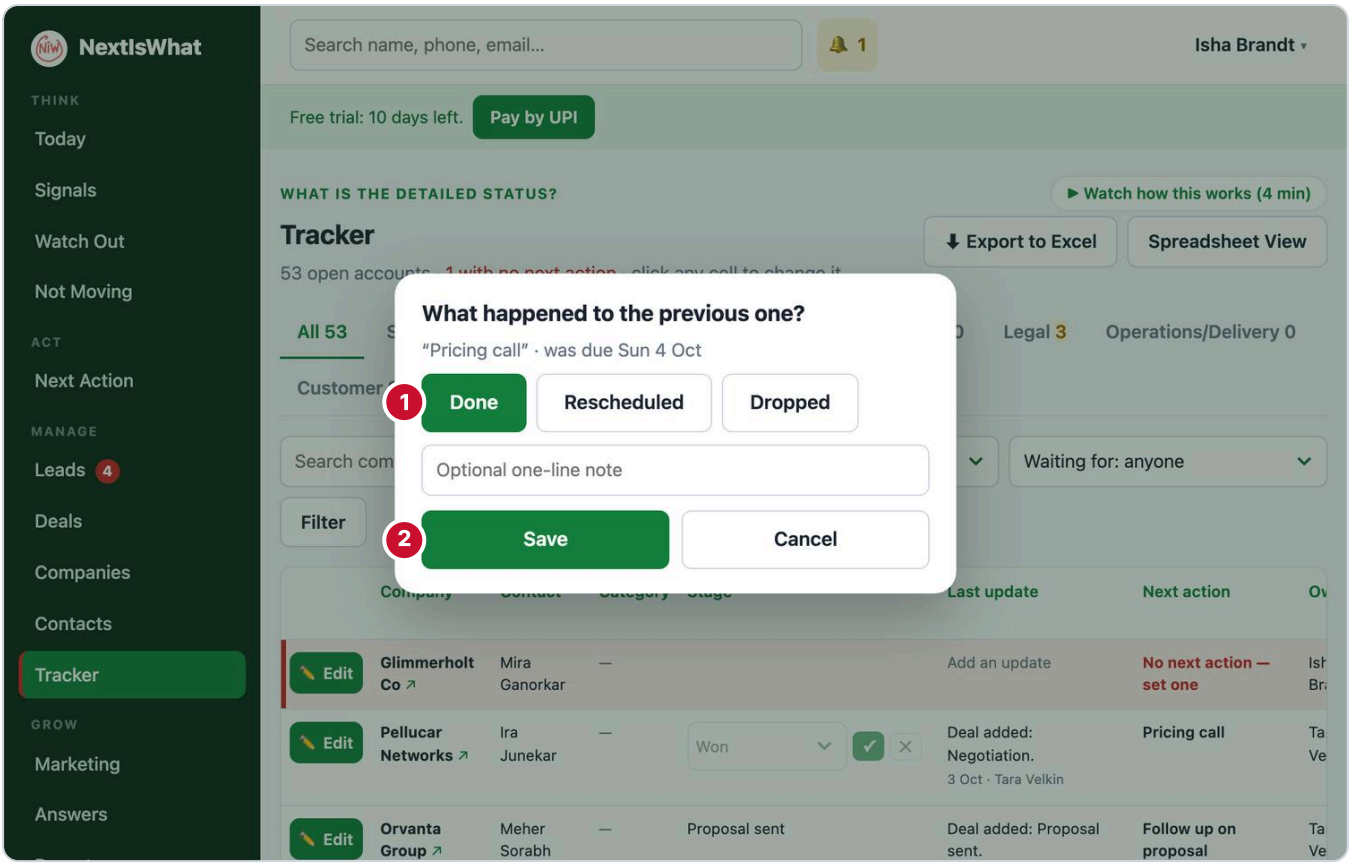
> **Tip** Use Export to Excel on the Tracker any time you need a copy for a meeting.

Click a cell



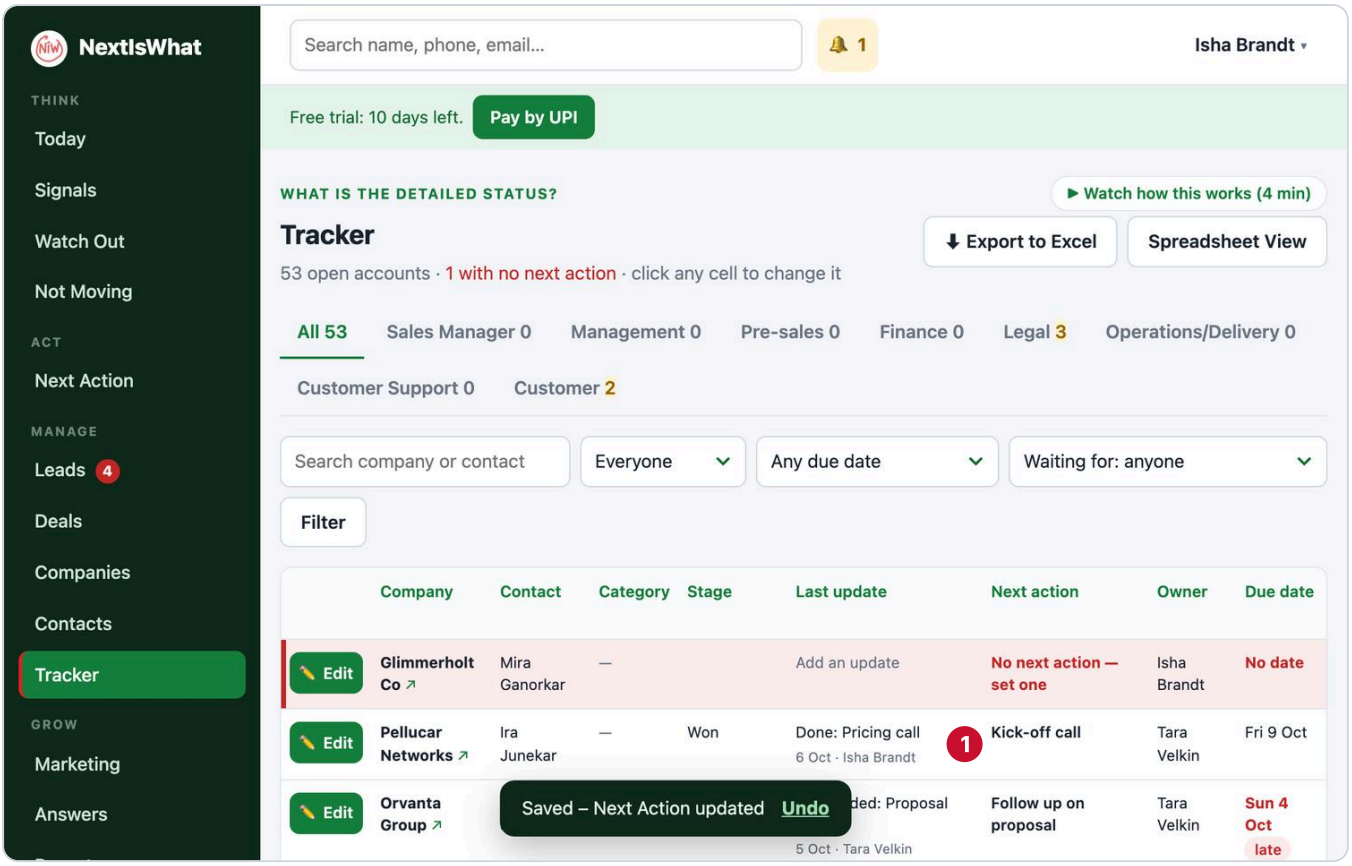
1. Click a cell, for example the stage, and choose a new value.
2. The next action for this row.

What happened to the previous one?



1. Choose Done, Rescheduled or Dropped.
2. Click Save.

Updated



1 The next action updates by itself, and the same change shows on Next Action.

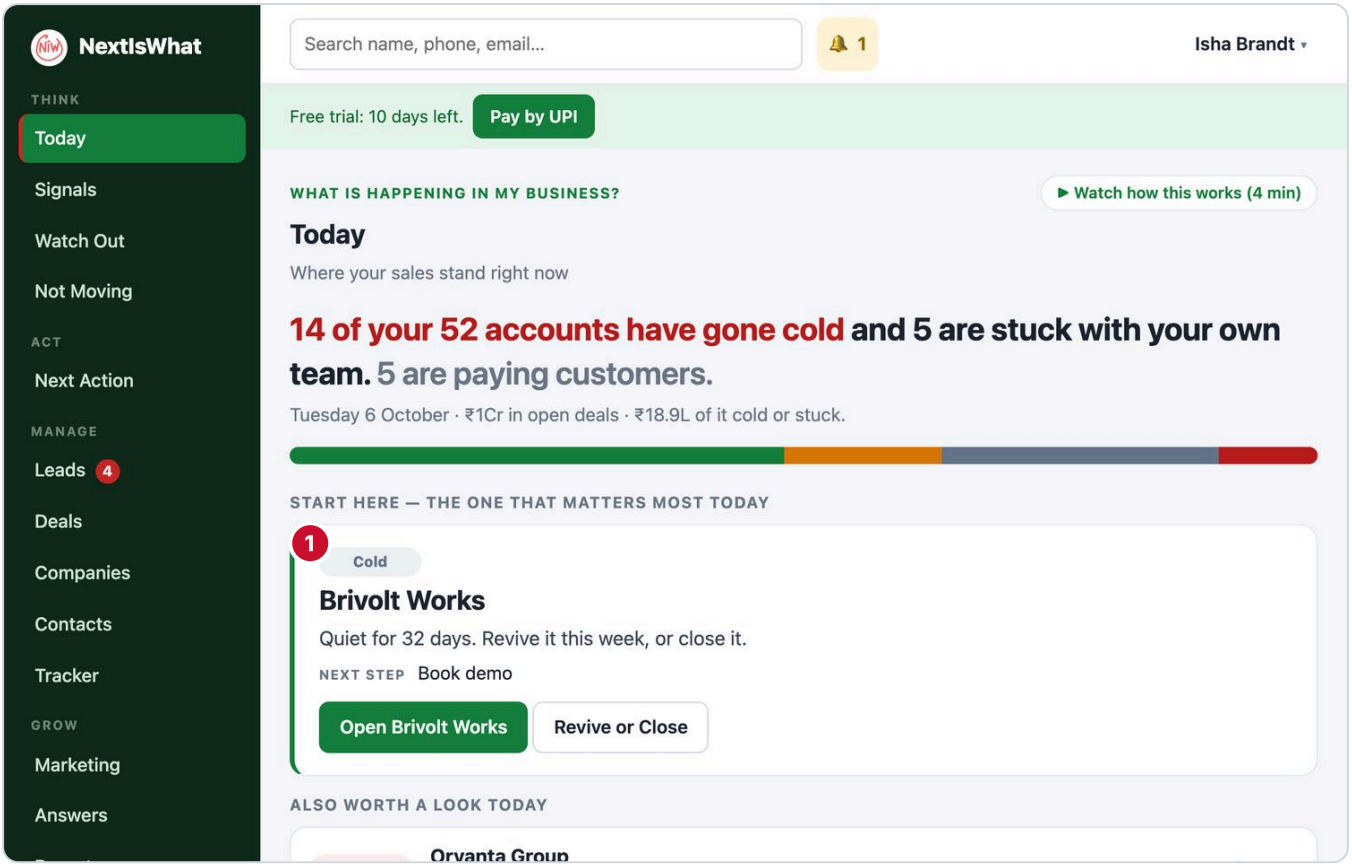
STEP 9

9 Your morning check: Today, Signals, Watch Out, Not Moving

Why this matters. Four screens tell you where to look before the day starts.

> **Tip** Days waiting turn amber after 2 days and red after 5. Start your morning with the red ones.

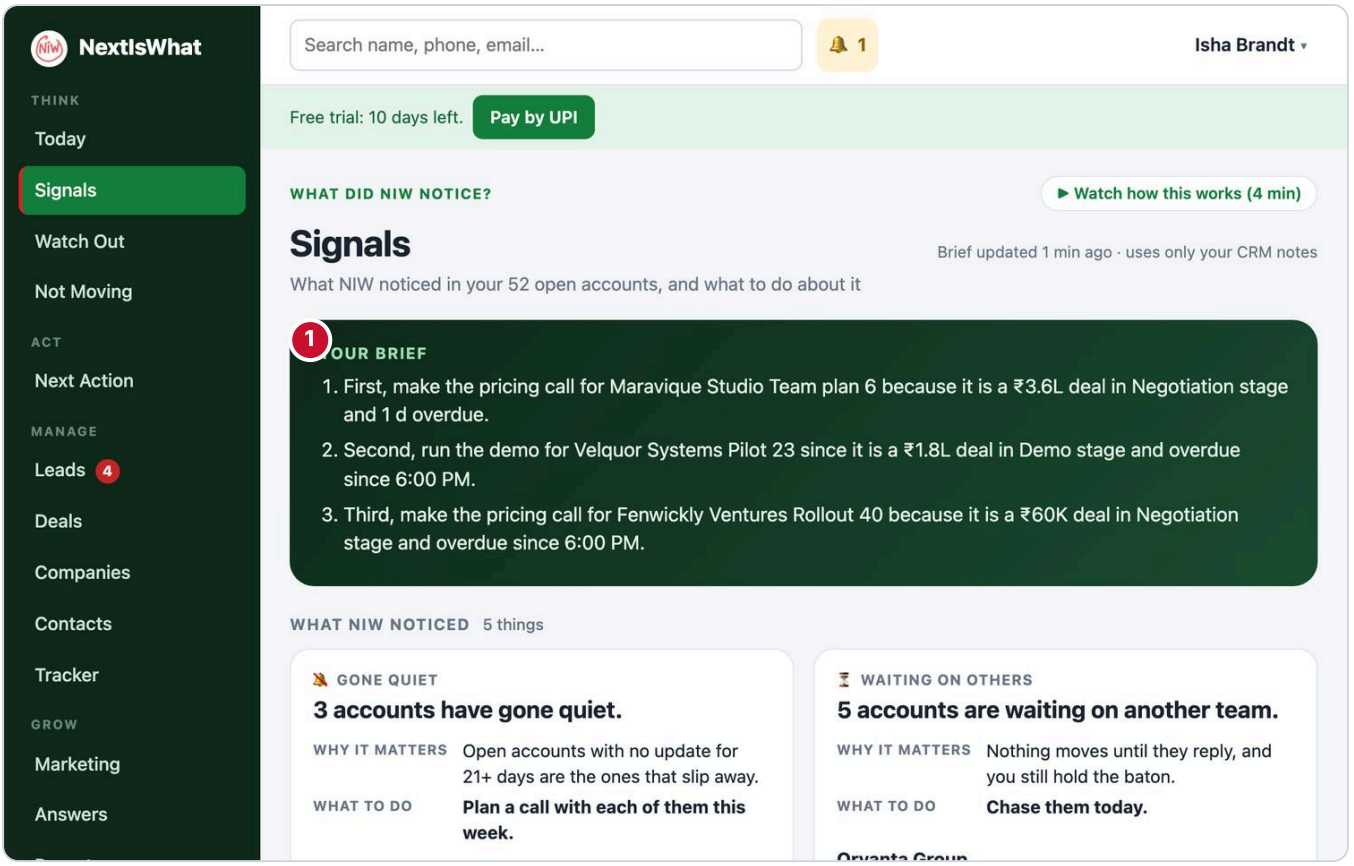
Today (managers and owner)



1 Start here: the one account that matters most today, and what to do about it.

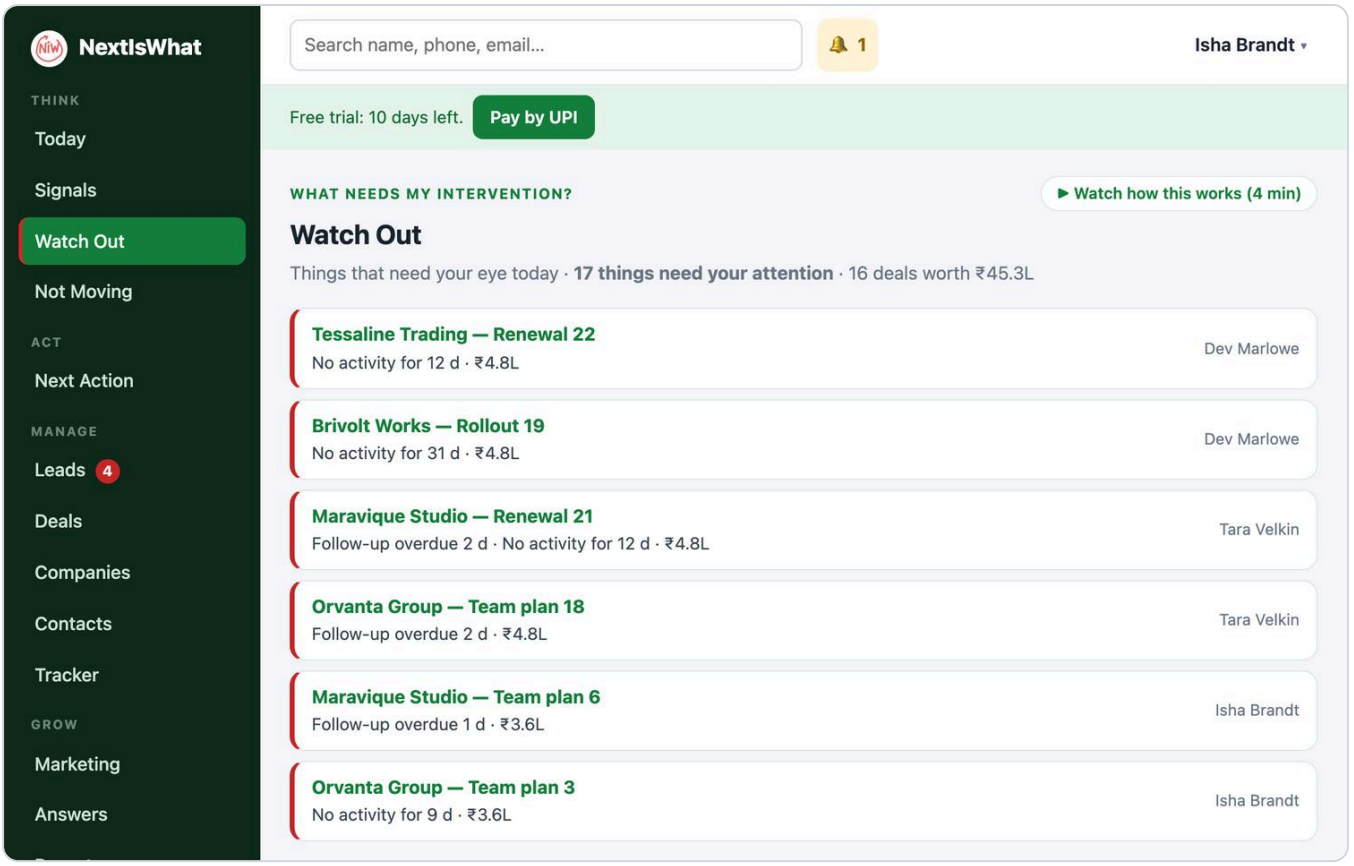
Below it, every account is Moving, Cooling, Cold or Stuck, so you see at a glance which ones need you.

Signals



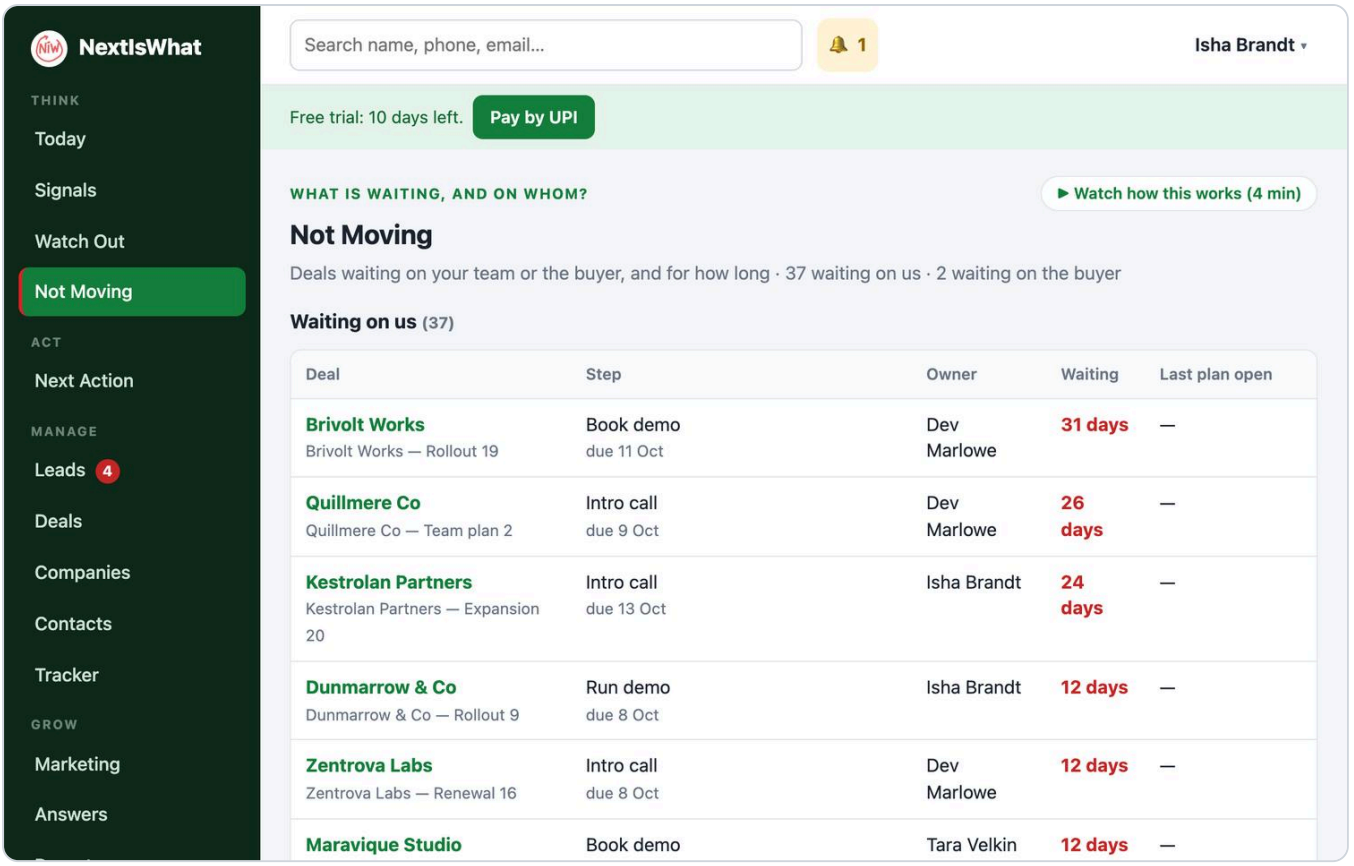
1 Your brief: the first things to do today. Below it, accounts that went quiet, are waiting on others, or are ready for more business.

Watch Out (managers)



1. Deals needing attention, with the owner and the reason. Below: new leads nobody has called, and your team at a glance.

Not Moving



1 Steps waiting on the buyer. Click Nudge on WhatsApp to send a polite reminder.

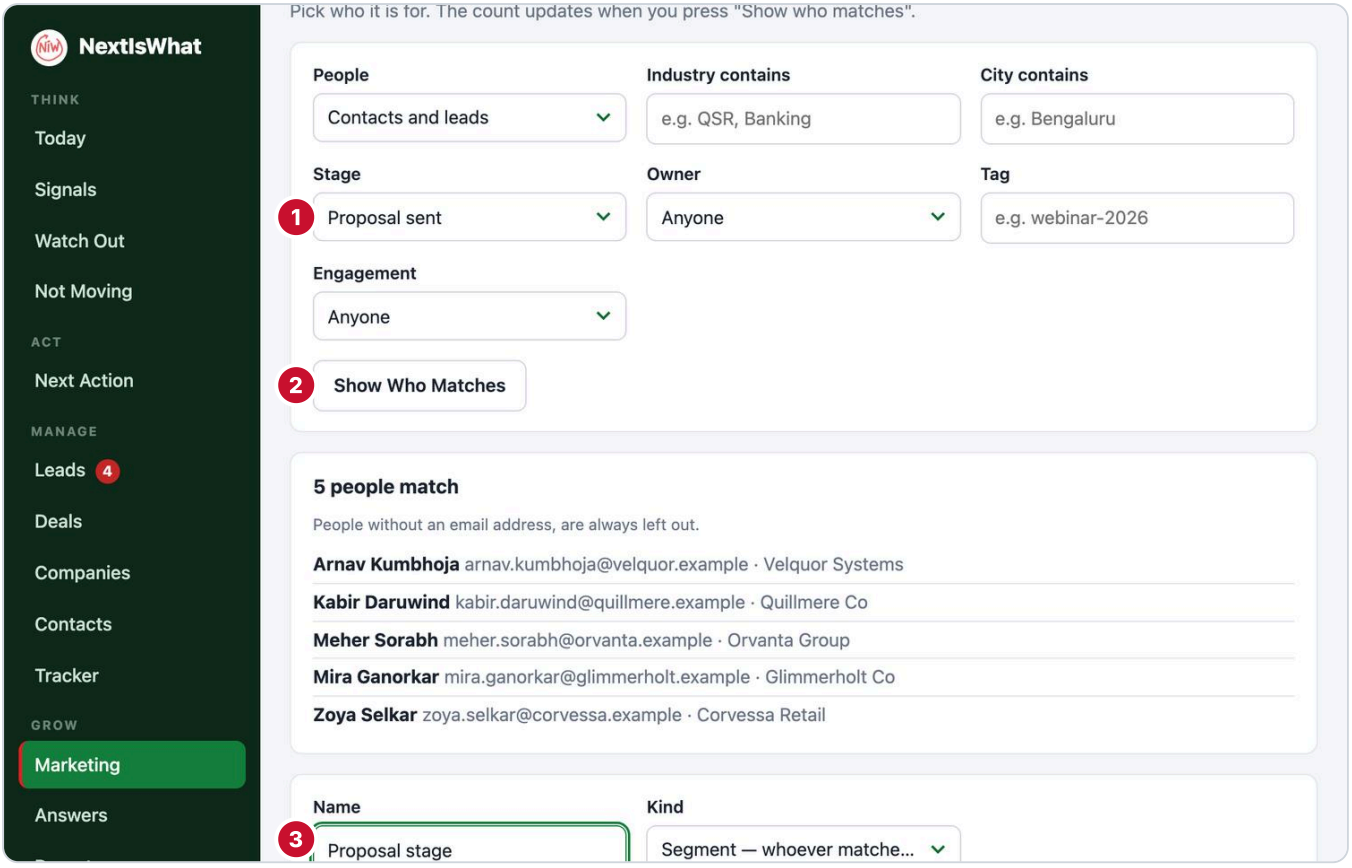
STEP 10

10 Marketing: audiences, WhatsApp plays and forms

Why this matters. Reach the right people from the same place your sales team works.

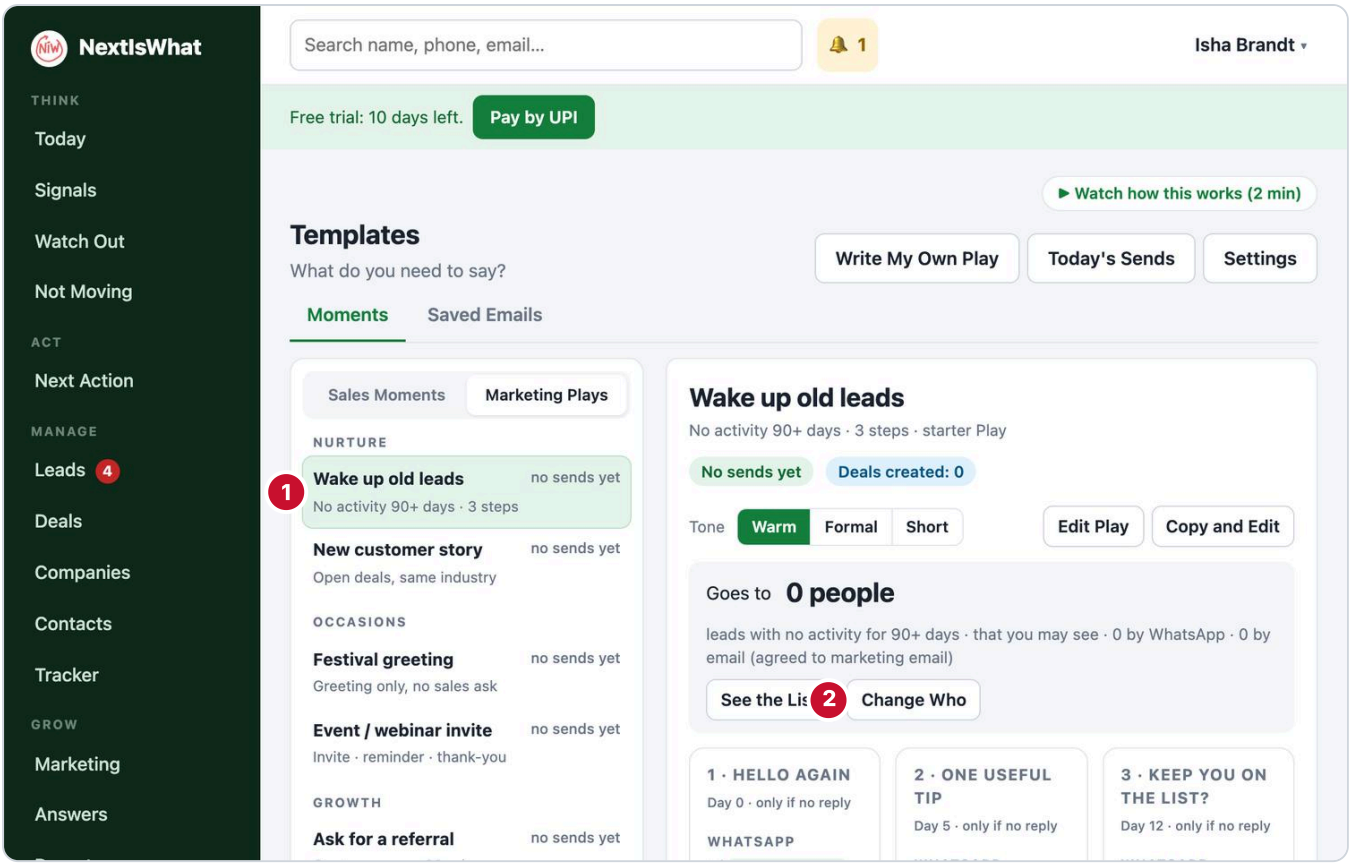
> **Tip** People who unsubscribed are always left out of every audience.

Marketing → Audiences



1. Filter your contacts and leads, for example by stage.
2. Click Show Who Matches.
3. Name the audience.
4. Click Save Audience.

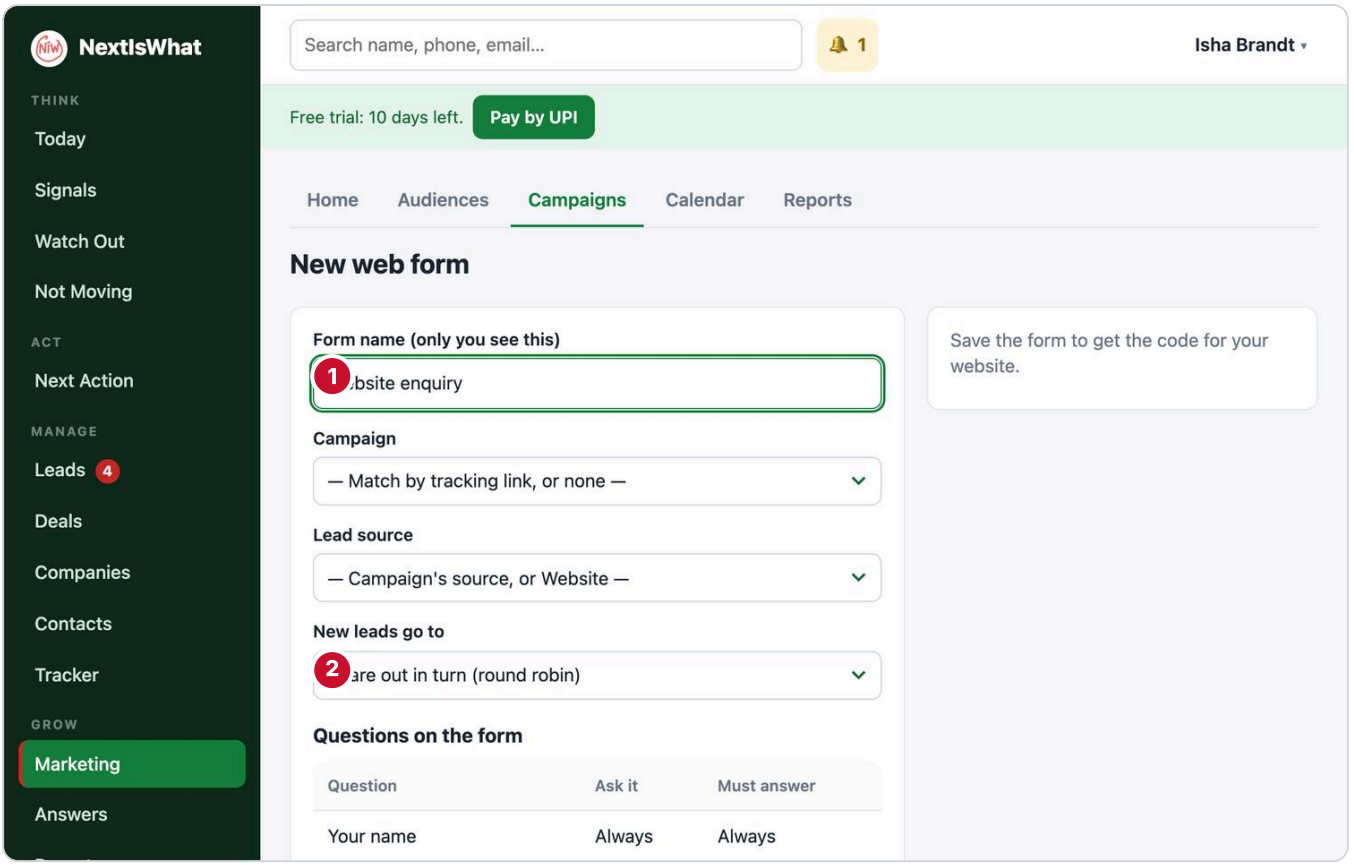
Templates → Marketing Plays



1. Pick a ready play, like Wake up old leads, a festival greeting or an event invite.
2. Choose who it goes to, fill in the blanks once, and start it.

WhatsApp messages from a play wait for you in Today's Sends: one tap each. A reply stops the play for that person and sets a next step for sales.

Marketing → Campaigns → Web Forms



1. Name your enquiry form.
2. Choose who gets the leads, or share them out in turn.

Copy the code into your website, or share the link. Every enquiry becomes a lead with a call due within one hour.

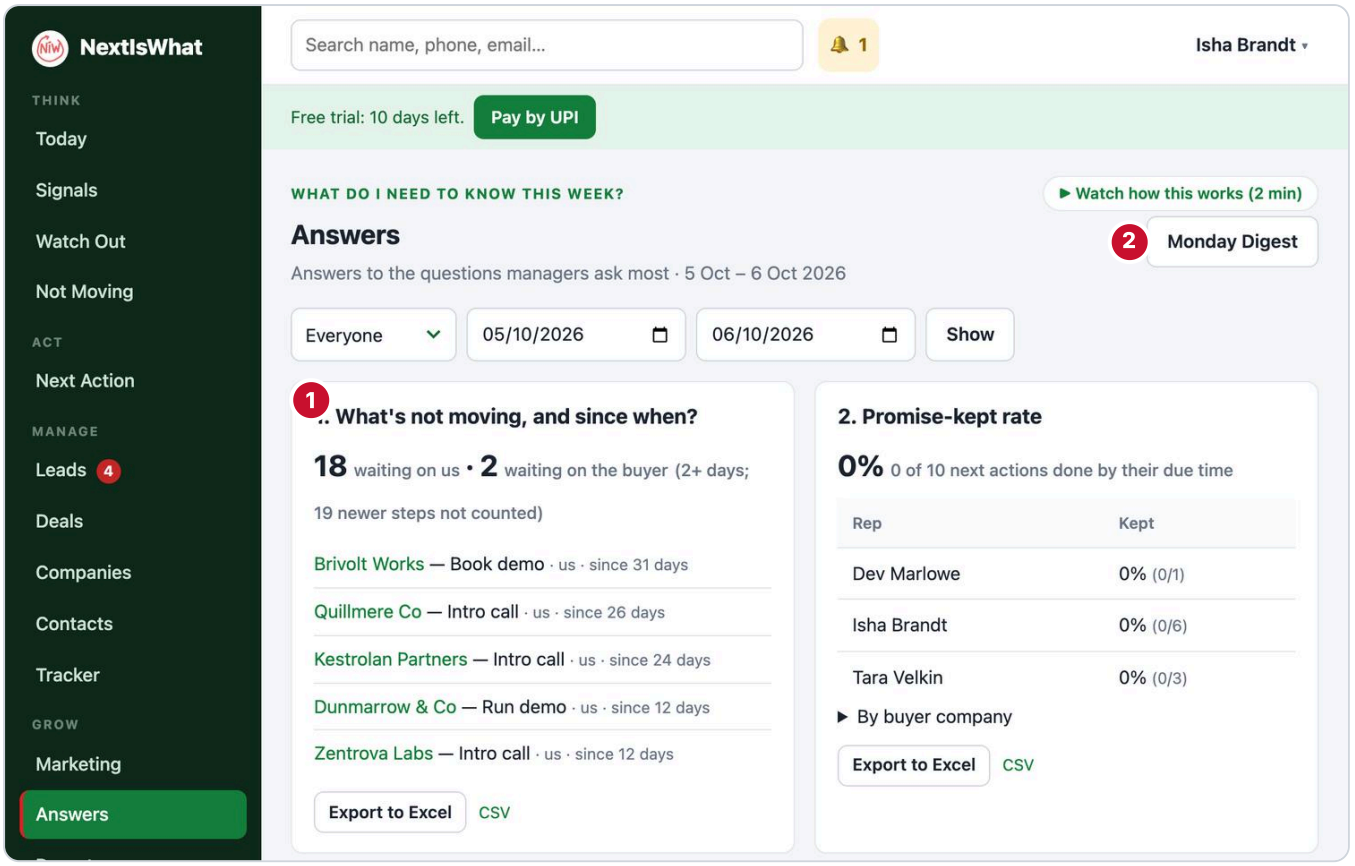
STEP 11

11 Answers and Reports

Why this matters. The numbers managers ask for every week, without building a report.

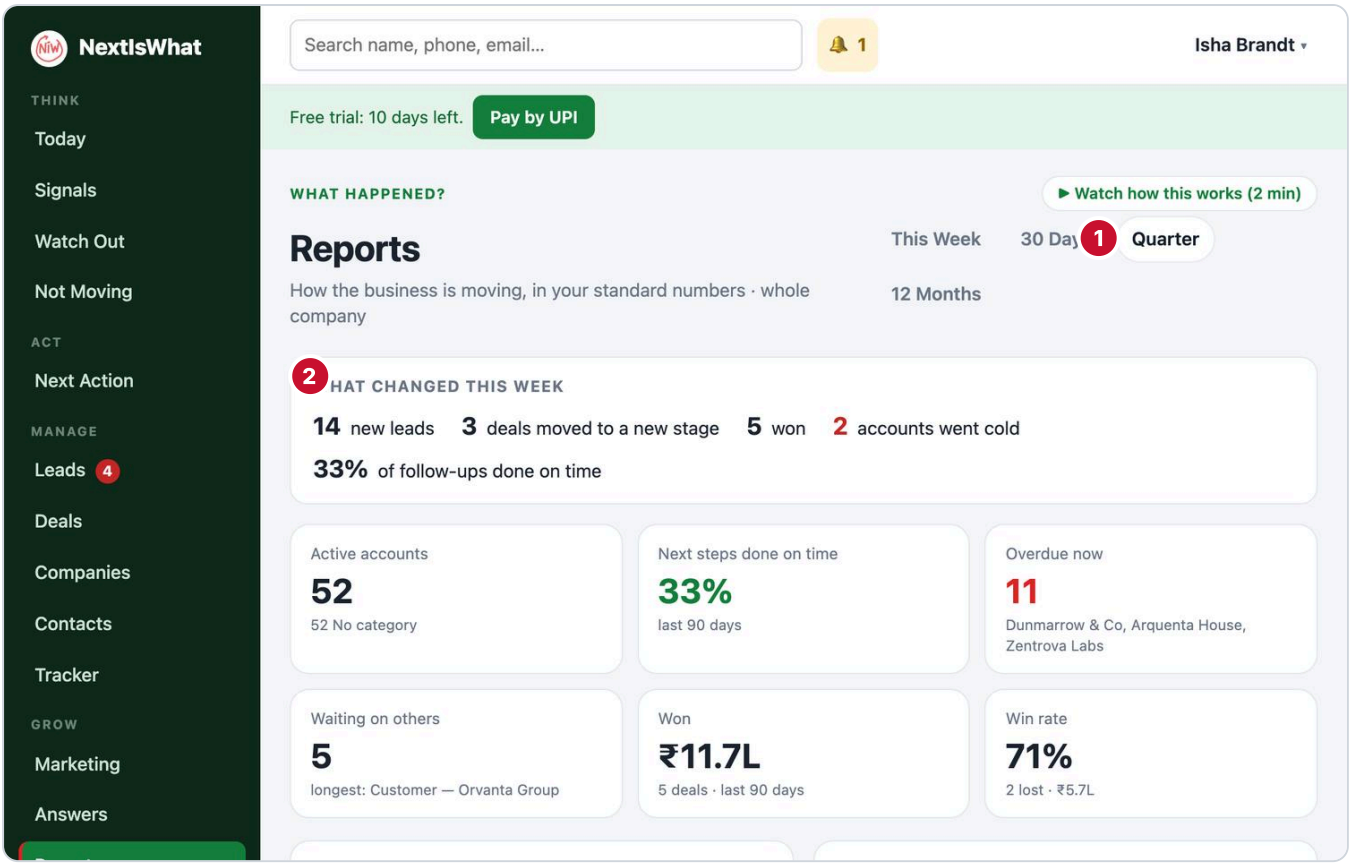
> **Tip** Every answer has Export to Excel.

Answers (managers and owner)



1. Six answers: what's not moving, promises kept, deals moved, momentum, where new deals came from, and overdue steps by person.
2. Monday Digest puts it in a short message you can send on WhatsApp.

Reports



1. Pick the period: this week, 30 days, a quarter or 12 months.
2. What changed, and every other report below it.

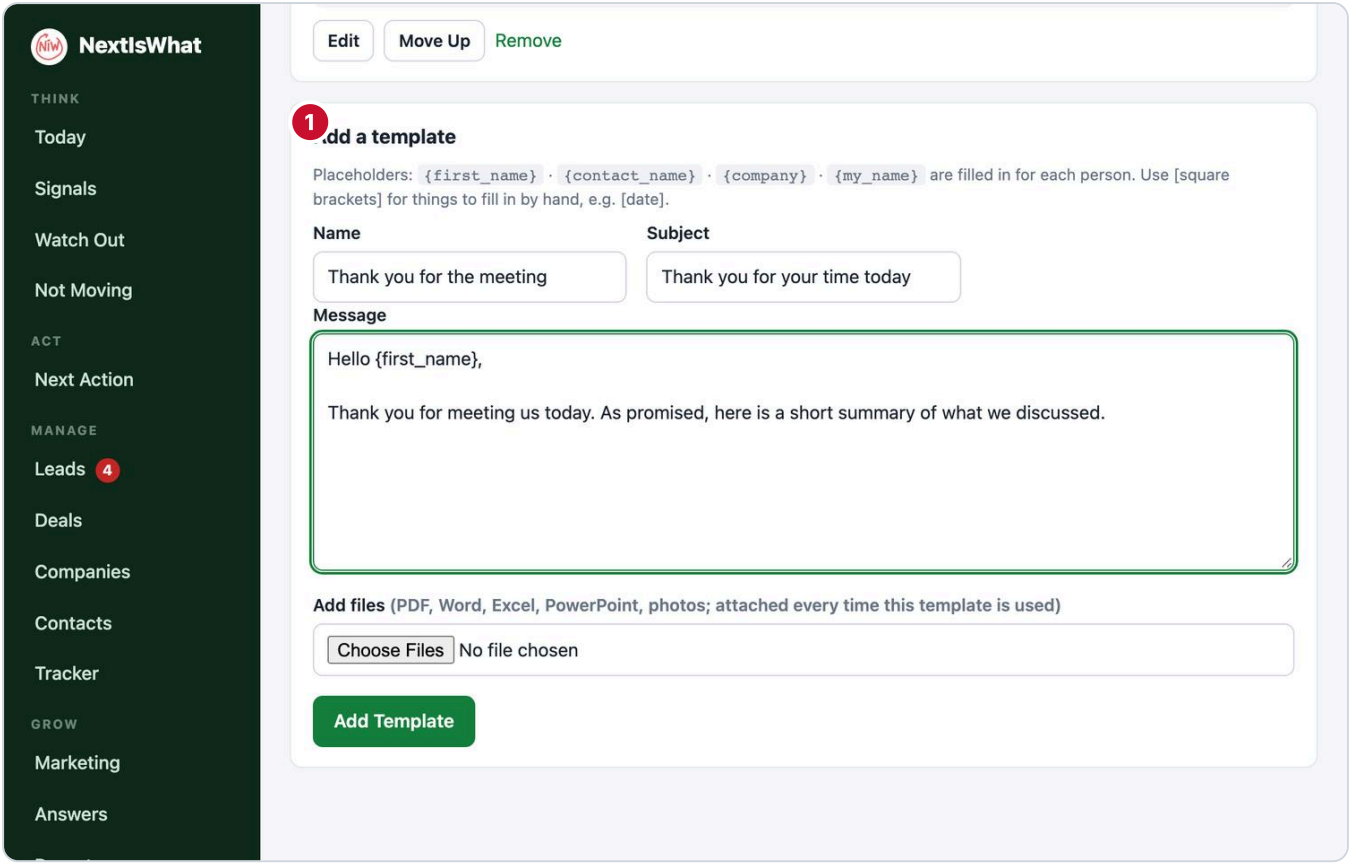
STEP 12

12 Save time: Templates, Game Plan, Activity Log

Why this matters. Write a message once, use it every day.

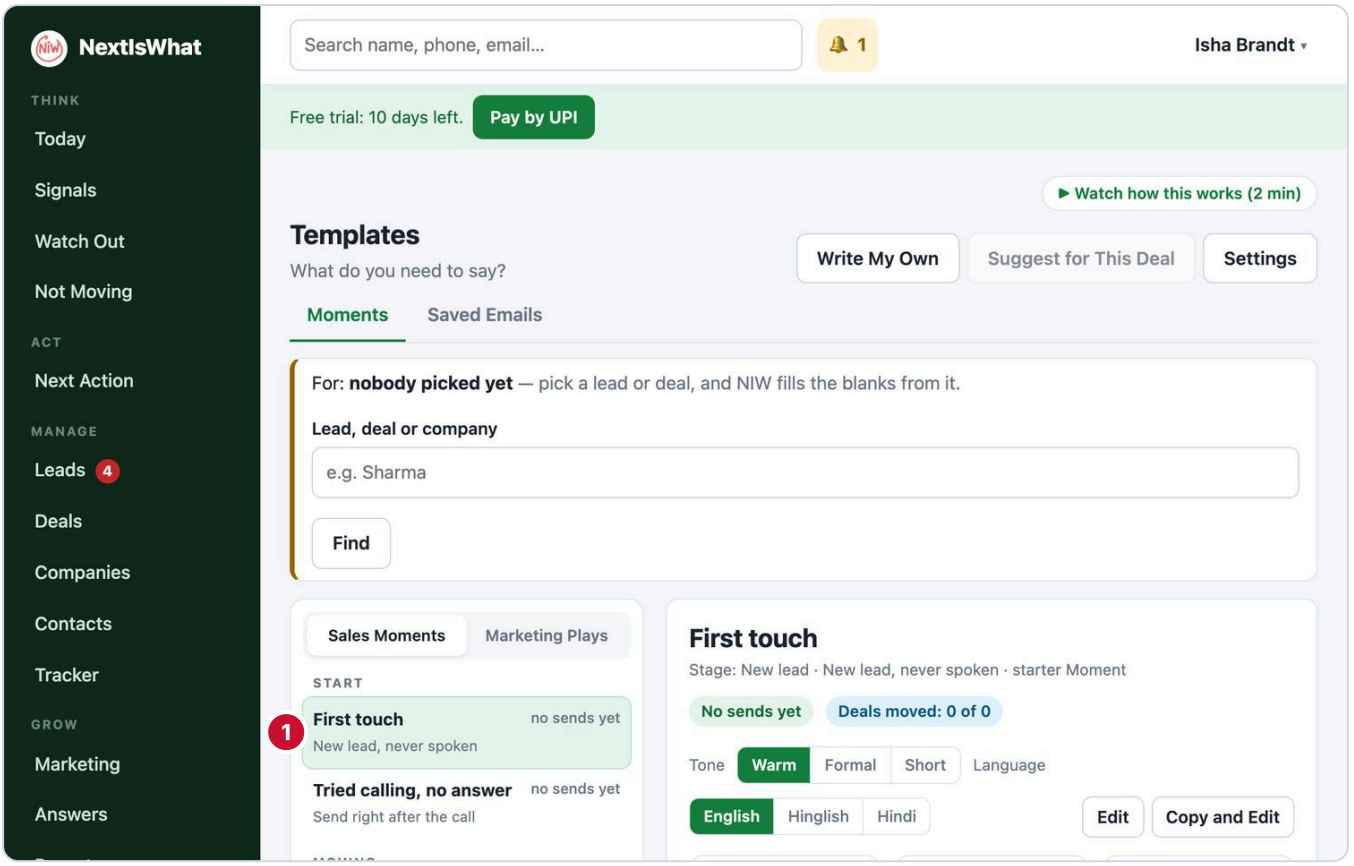
> **Tip** Game Plan is in Step 6. Moments also tell you what to do if the customer replies, or goes quiet.

Templates → Saved Emails → + New Template



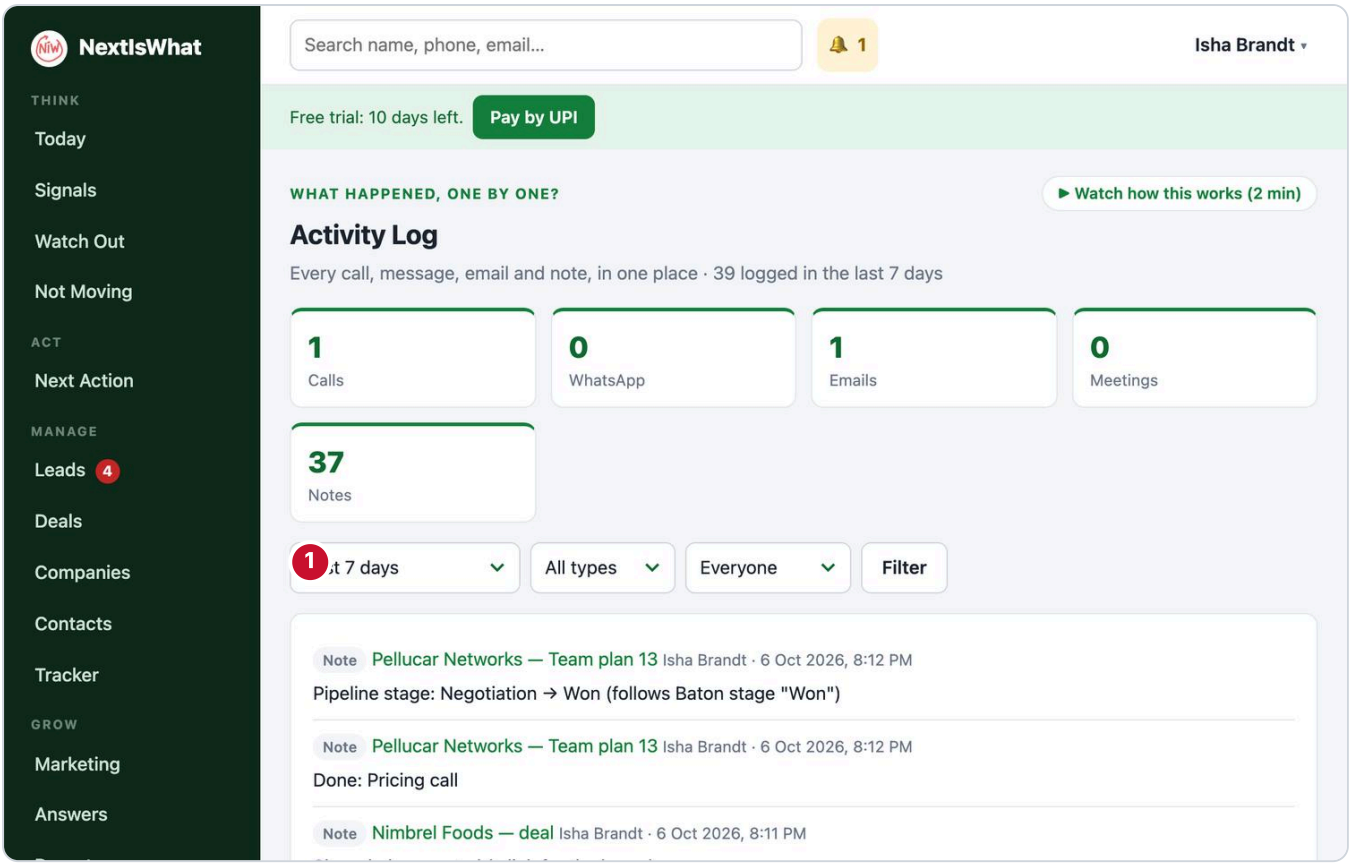
1 Give it a name, a subject and your words, attach a brochure if you like, and save.

Templates → Moments



1. Ready messages for each moment in a sale, like a first touch or after a meeting.
2. Fill in the blanks and send it on WhatsApp in one tap.

Activity Log



1 Every call, WhatsApp, email, meeting and note, one by one. Filter by period, type and person.

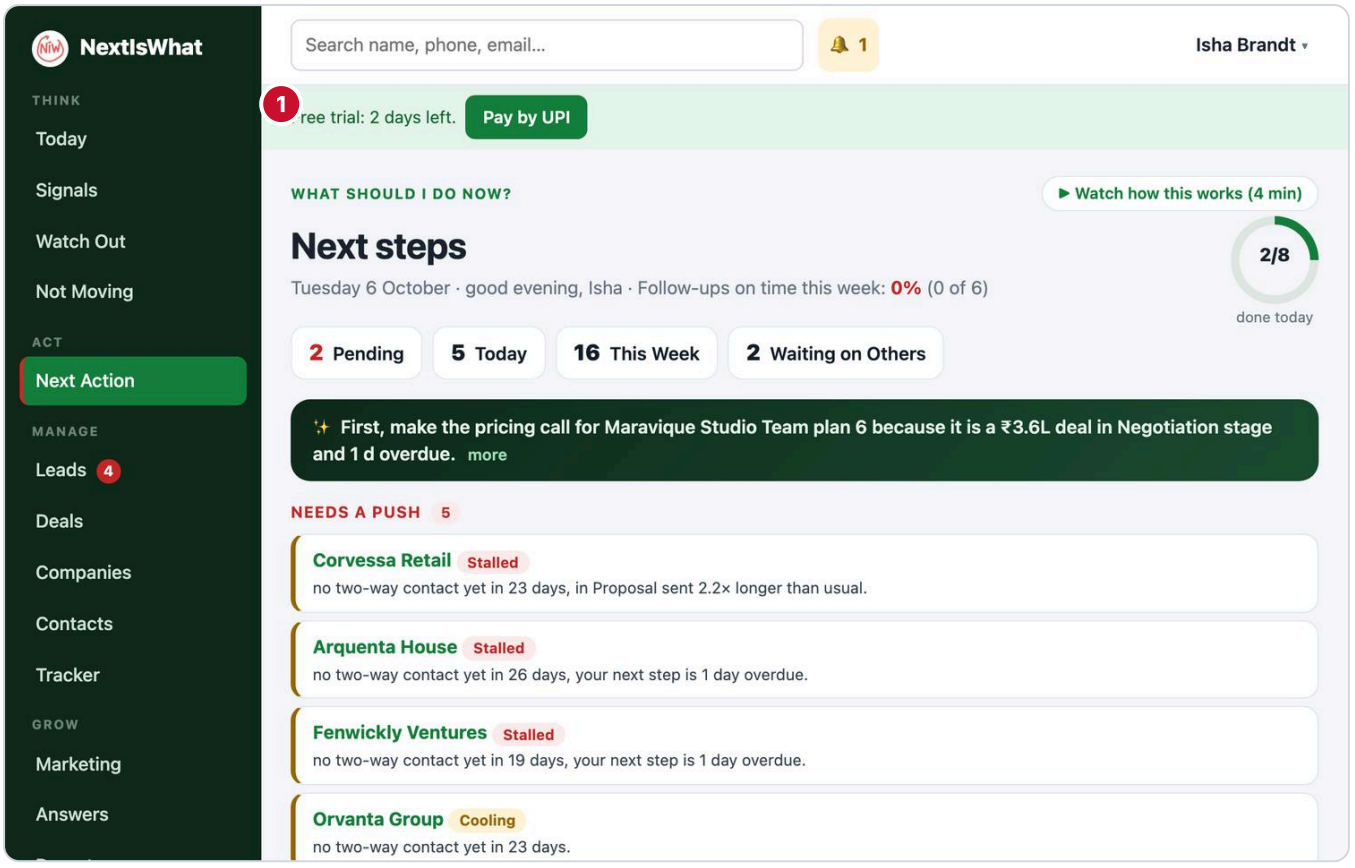
STEP 13

When your trial ends

Why this matters. No surprises: you always see how many days are left.

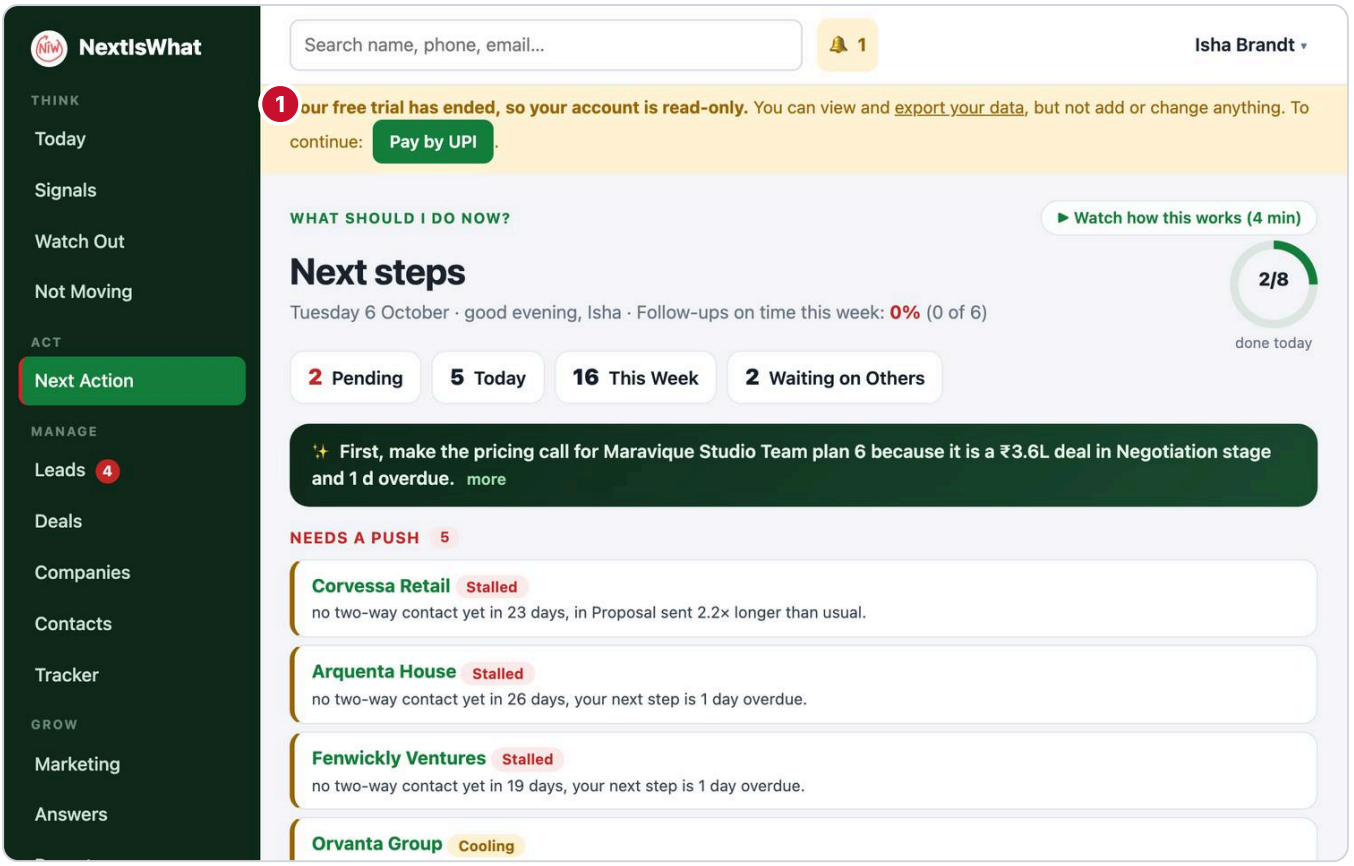
> **Tip** Pay before the trial ends and your team never stops.

Two days left



1 The bar counts down, with a Pay by UPI button.

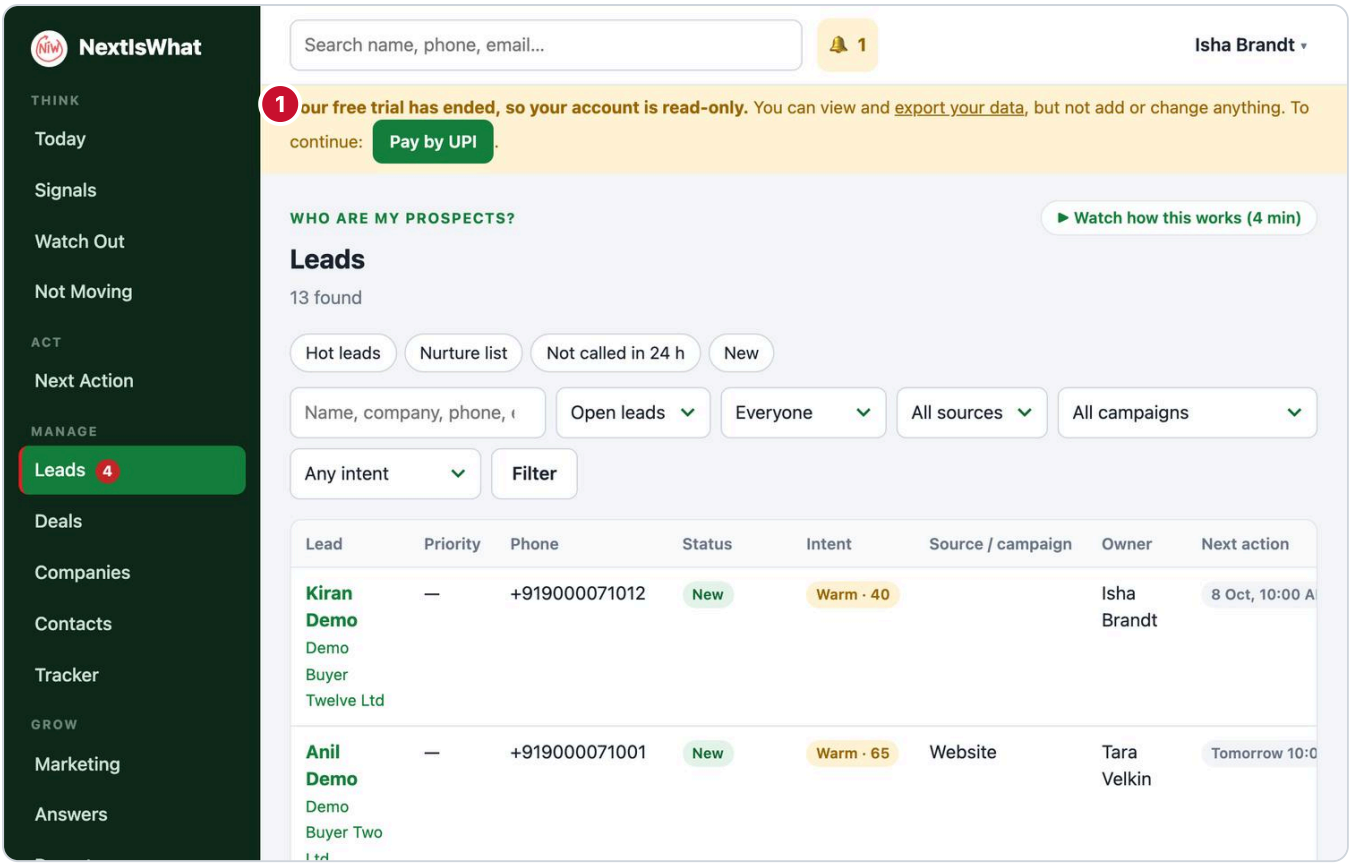
Trial ended



1 After 14 days without payment, your account becomes view-only.

Everyone can still log in, see everything and export the data. Buttons that add or change things are hidden until you pay.

View-only



1 The banner explains it, with Pay by UPI. Leads, deals and contacts are still there to read.

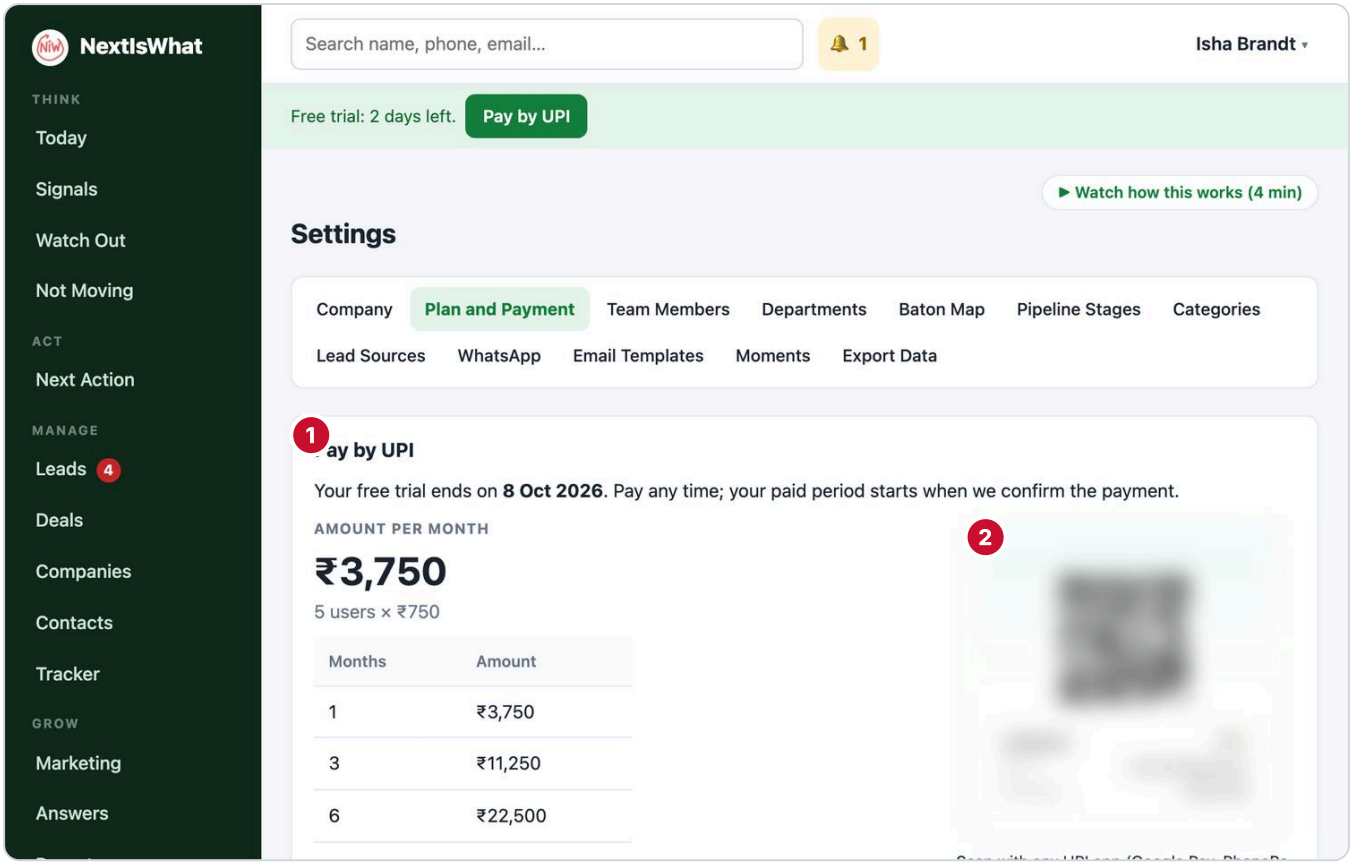
STEP 14

14 Pay by UPI and keep going

Why this matters. One plan, everything included. You pay by UPI; no card needed.

> **Tip** ₹750 per user per month, one plan: Sales + Account Management + Marketing. The first 50 companies to pay keep that price locked for 12 months. Refer another company from Plan and Payment and you both get 15% off your next 3 monthly invoices.

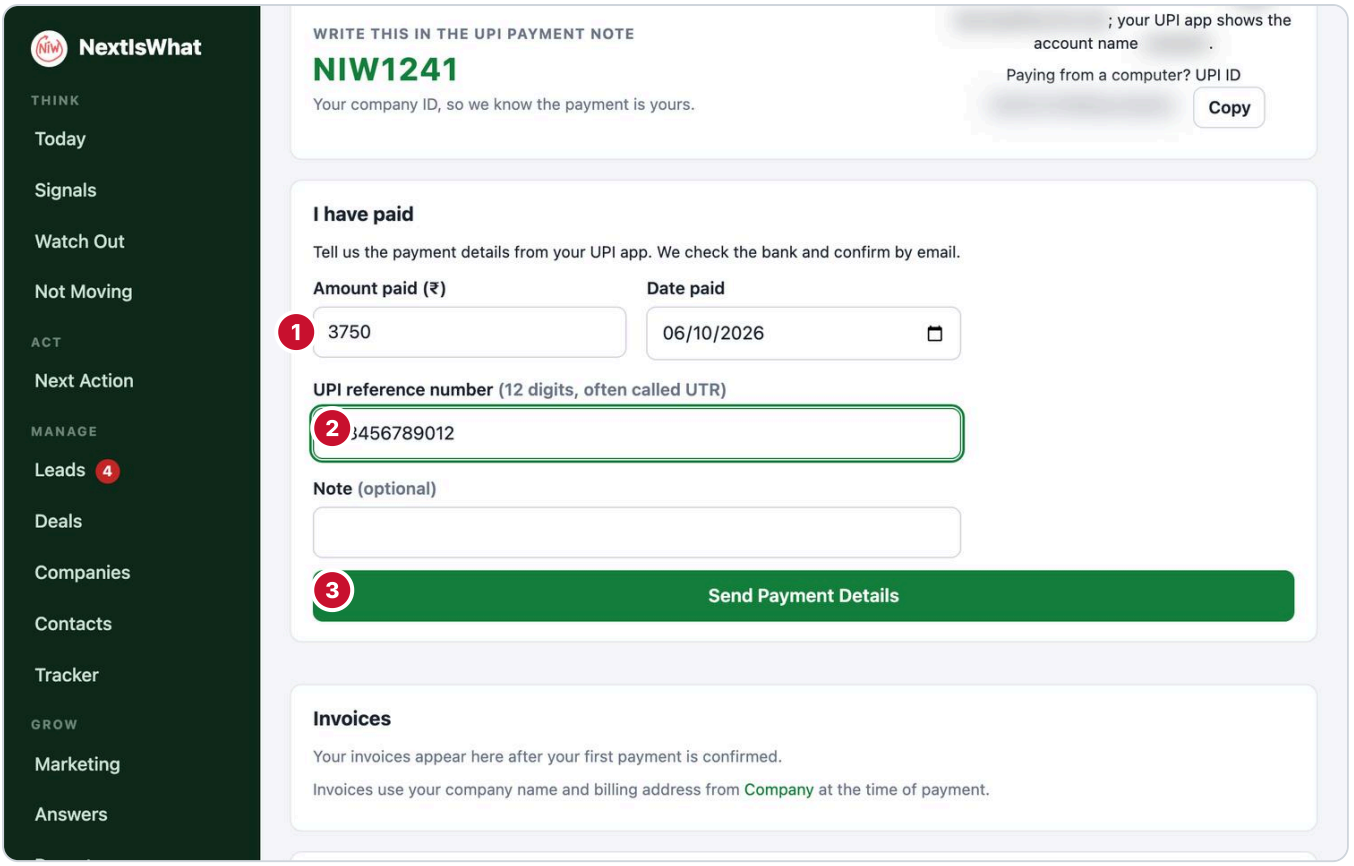
Settings → Plan and Payment (or Pay by UPI in the bar)



1. What you pay each month: the number of users in your plan × the price per user.
2. Scan the QR code inside NIW with any UPI app, like Google Pay, PhonePe or Paytm.

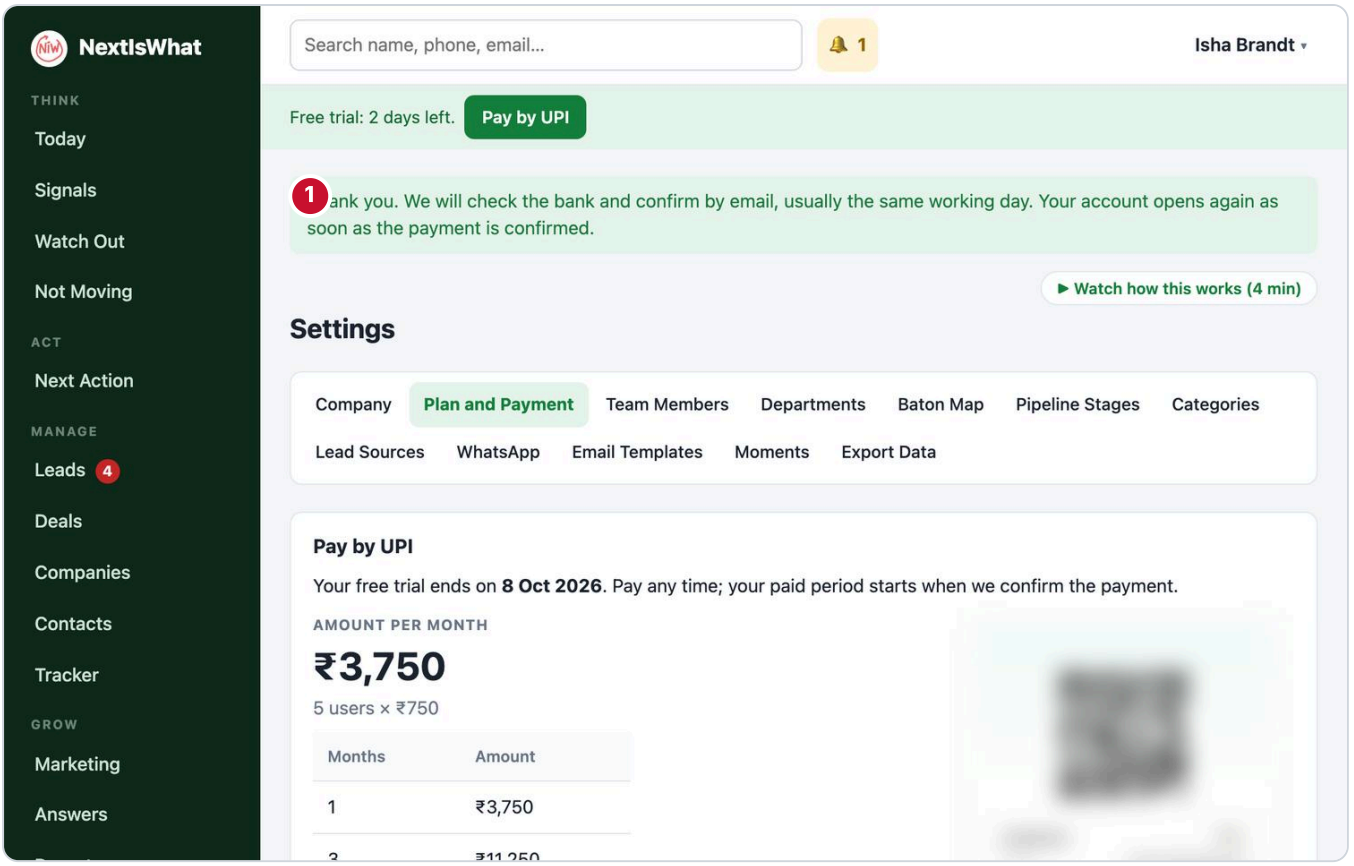
Write your company ID (shown under the amount) in the UPI payment note, so we know the payment is yours. The QR code is blurred in this guide: always scan it inside NIW.

I have paid



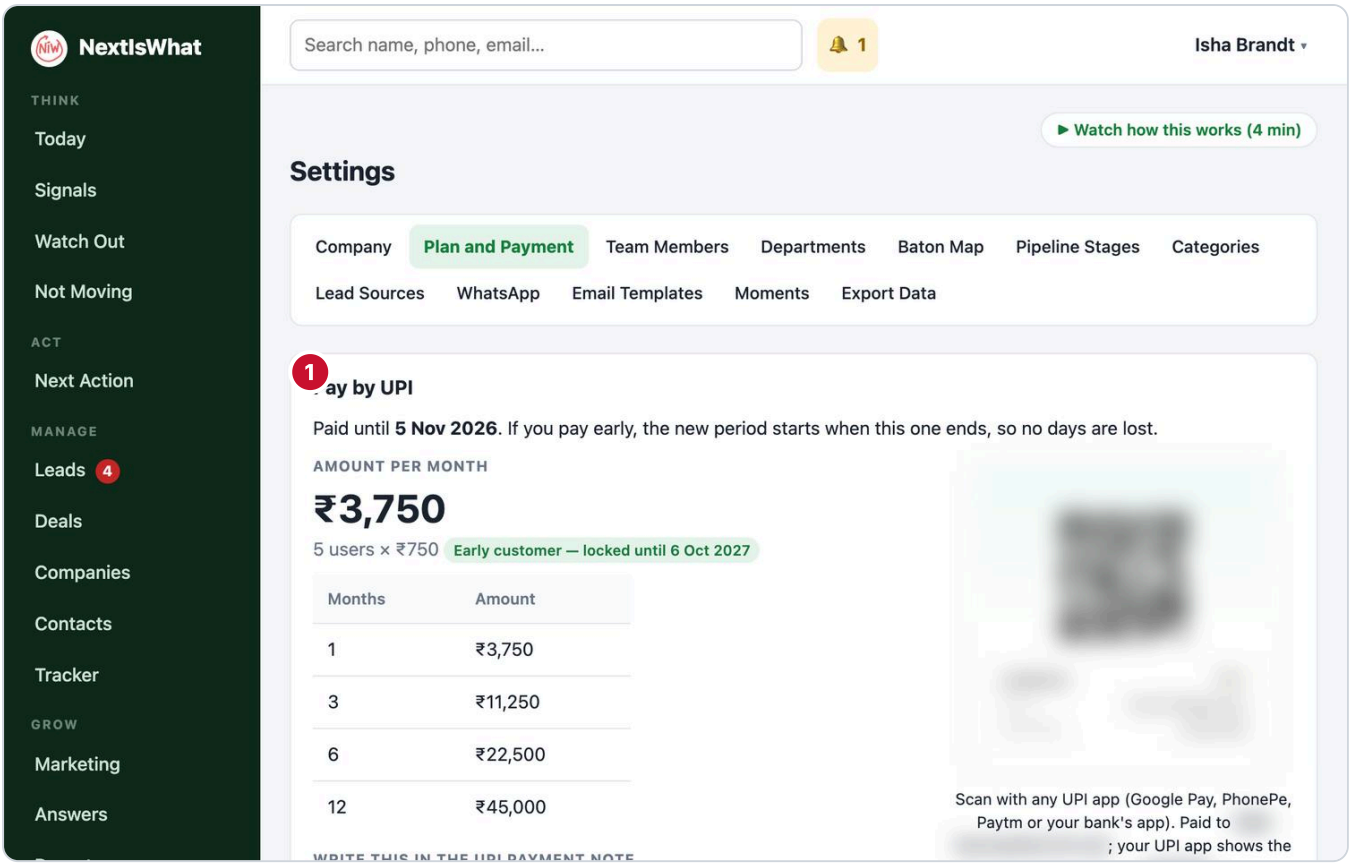
1. The amount is filled in.
2. Type the 12-digit UPI reference number (UTR) from your UPI app.
3. Click Send Payment Details.

Payment details sent



1 We check the bank and confirm by email, usually the same working day.

Active



1. Your plan shows the date it is paid until.
2. Your invoice appears here.

What you can do in NextIsWhat

Every tab in the menu, in one line each.

THINK

Today	Where your sales stand right now: the one account to start with, and every account by health.
Signals	What NIW noticed in your accounts, and what to do about it.
Watch Out	What needs a manager: deals at risk, leads nobody called, your team at a glance.
Not Moving	What is waiting, on your team or on the buyer, and for how long.

ACT

Next Action	Your list for the day: overdue, today, this week, and waiting on others.

MANAGE

Leads	People and companies you haven't sold to yet, with a score for each.
Deals	Your opportunities by stage, with values.
Companies	Every company, with everything about it on one page.
Contacts	Your shared address book of people.
Tracker	Your whole pipeline in one table; edit any cell.

GROW

Marketing	Audiences, campaigns, web forms, a calendar and marketing reports.
Answers	Six answers managers need every week, and the Monday digest.
Reports	What happened, by period, by person and by source.

TOOLS

Templates	Ready messages for every moment, saved emails and marketing plays.
Game Plan	The steps for each deal stage, for you and your buyer.
Activity Log	Every call, message and note, one by one.
Settings	Your company, plan and payment, team, stages and more (owner only).

Tip: there is also a **Training** page in the menu, with short videos for every part of NextIsWhat.

Questions

Do I need a card to start?

No. The 14-day trial is free, with every feature switched on, and needs no payment.

What happens after 14 days?

If you haven't paid, your account becomes view-only: you can still log in, see and export your data, but not add or change anything. Pay by UPI and it opens again as soon as the payment is confirmed.

How much does it cost?

₹750 per user per month, one plan with Sales, Account Management and Marketing together. The first 50 companies to pay keep that price locked for 12 months from their first payment.

Is there a referral discount?

Yes. Share your referral link from Settings → Plan and Payment. When a company signs up with it, you both get 15% off your next 3 monthly invoices (yours starts after their first payment).

How do I pay?

By UPI, with the QR code in Settings → Plan and Payment. Then type the UPI reference number (UTR) and click Send Payment Details.

Does it work on my phone?

Yes, in any browser on a phone, tablet or laptop. Nothing to install. To add it to your home screen: on an iPhone, open nextiswhat.com in Safari, tap Share, then Add to Home Screen. On Android, open it in Chrome and choose Add to Home screen (or Install app) from the ⋮ menu.

Can I get my data out?

Yes. The owner can download leads, deals, contacts, companies and activities any time in Settings → Export Data, even when the account is view-only.

Need help?

Watch the short videos on the **Training** page in the menu: one for every part of NextIsWhat.

Or write to us at **hello@nextiswhat.com** (the Contact link at the bottom of nextiswhat.com).