

# MANOVAIDYA SALES AUTOMATION IMPLEMENTATION MANUAL

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## SECTION 1 — FUNNEL OVERVIEW (NEW MODEL)

### 1. Lead Generated → Added to Google Sheet

(From: Facebook Ads, Meta Leads, WhatsApp, GMB, Website, Referrals, Manual)

### 2. New Lead Sequence (Sequence 0)

Educate → Free Course → Book Consultation (₹599)

### 3. Counsellor Call Attempt

Result	Sequence
Call Not Picked	A1
Call Picked, No Consultation	A2
Call Picked + Consultation Booked	B

### 4. Consultation Stage

Result	Sequence
Consultation Not Attended	C
Consultation Attended + No Package	D
Consultation Attended + Package Purchased	Move to Patient Sheet

### 5. Package Purchased → Patient Onboarding Funnel

(Sales sequences stop; Patient sequences start)

## LEAD GENERATED



## SEQUENCE 0: NEW LEAD EDUCATION + FREE COURSE INCENTIVE



## COUNSELLOR CALL



— No Pickup → SEQUENCE A1 (Call No Pickup)



— Call Picked, No Booking → SEQUENCE A2 (Consultation Closing)



— Consultation Booked → SEQUENCE B (Consultation Prep + Course)



## CONSULTATION DAY



— Not Attended → SEQUENCE C (Re-Engage for Consultation)



— Attended



— No Package → SEQUENCE D (NLP Closing Sequence)

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└— Package Purchased → Move to PATIENT SHEET + PATIENT ONBOARDING

## ⭐ UPDATED SEQUENCES (FINAL VERSION)

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### ⭐ SEQUENCE 0 — NEW LEAD EDUCATION + FREE COURSE INCENTIVE + CONSULTATION BOOKING

Trigger: NEW\_LEAD

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#### ◆ MESSAGE 1 — Immediately (Welcome + Direction)

Hi 

Welcome to Manovaidya Autism Support System 

We help parents get clarity, a roadmap, and real improvement in their child's behaviour, speech & focus.

Your next step is simple 

👉 Book the Consultation for ₹599

👉 And get the Free Autism Breakthrough Code Course instantly unlocked (worth ₹2499)

This course is your first major clarity step.

 [Free Course](#)

<https://course.manovaidya.com/>

## **FOR APPOINTMENT**

[https://manovaidya.in/autism\\_landingpage.php](https://manovaidya.in/autism_landingpage.php)

### **“How to Book Consultation & Unlock Free Course”**

( choosing Online/Offline mode → selecting slot → paying ₹599 → course unlocking)

[https://manovaidya.in/autism\\_landingpage.php](https://manovaidya.in/autism_landingpage.php)

👉 You can choose **ONLINE or IN-CLINIC consultation** with Dr. Ankush Garg.

👉 For manual booking, call our counsellor: **7823838638** (10 AM–7 PM, Sunday off)

Our counsellor will also call you shortly.

Reply **HI** to know more.

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## **◆ MESSAGE 2 — 1 Hour Later (Explain Value)**

Most parents feel confused because they don't know:

- What to do
- What not to do
- Why interventions fail
- What actually improves Autism symptoms

Your FREE COURSE gives this clarity.

And you get it **only when you book the consultation.**

🔗 **Free Course**

<https://course.manovaidya.com/>

## **FOR APPOINTMENT**

[https://manovaidya.in/autism\\_landingpage.php](https://manovaidya.in/autism_landingpage.php)

🎥 **VIDEO (Optional): “Free Course Overview — 30 sec”**

 For help: **7823838638** (10 AM–7 PM, Sunday off)

Reply **COURSE** if you want details.

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## **MESSAGE 3 — 3 Hours Later (Free Course Breakdown)**

Here's what you'll learn in the FREE Autism Breakthrough Code Course 

Module 1: Autism ko sahi way se samajhna

Module 2: Why 80% interventions fail

Module 3: The 180-Day Improvement Roadmap

And you'll also receive assignments that help YOU + US understand your child deeply.

Unlock the course instantly →

 **₹599 Consultation + Free Course Link**

<https://course.manovaidya.com/>

### **FOR APPOINTMENT**

[https://manovaidya.in/autism\\_landingpage.php](https://manovaidya.in/autism_landingpage.php)

 **VIDEO (Remains same): Roadmap Preview / Course Preview**

 For assistance: **7823838638**

Reply **READY** if you want a slot.

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## **MESSAGE 4 — Next Morning (Expectation Setting)**

You will soon receive a call from our counsellor to guide you.  
If you miss the call, no worries — we'll also send the booking link.

Your clarity starts with ONE session + the free course that comes with it.

- 📌 Consultation can be **Online or In-Clinic**.
- 📞 For manual assistance: **7823838638** (10 AM–7 PM, Sunday off)

Reply **HELP** if you want to understand the process.

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## ◆ MESSAGE 5 — FAQ Burst (Optional on “QUESTION”)

Most parents ask:

- ① Consultation online hogi?
  - ✓ Yes, **video call** available.
  - ✓ In-clinic option also available.
- ② Kitna time lagega?
  - ✓ 60 minutes. Assessment + Consultation + System Roadmap
- ③ Course kab milega?
  - ✓ Immediately after booking consultation.
- ④ Kya discuss hogta?
  - ✓ Child's condition, behaviours, struggles, right direction, improvement possibilities.

FOR COURSE

<https://course.manovaidya.com/>

FOR APPOINTMENT

[https://manovaidya.in/autism\\_landingpage.php](https://manovaidya.in/autism_landingpage.php)

Manual help:

- 📞 **7823838638** (10 AM–7 PM, Sunday off)

- 🔗 Book your slot here:  
[Insert Link]

Reply **YES** if you're ready.

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## SEQUENCE A1 — CALL NOT PICKED

**Trigger:** CALL\_ATTEMPTED + NO\_PICKUP

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### MESSAGE 1 — Immediately After No Pick-Up

Hi 

We just tried calling you regarding your child's support journey.

No worries — we'll try again later.

Meanwhile, you can also directly book the consultation + free course:

<https://course.manovaidya.com/>

#### FOR APPOINTMENT

[https://manovaidya.in/autism\\_landingpage.ph](https://manovaidya.in/autism_landingpage.ph)

 Or you can call us back at: **7823838638**

 10 AM to 7 PM (Sunday off)

Reply **TIME** to tell us your preferred time.

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### MESSAGE 2 — 2 Hours Later (Empathy)

Sometimes calls get missed, and that's okay 

Your next step remains the same:

 Book Consultation

#### FOR APPOINTMENT

[https://manovaidya.in/autism\\_landingpage.ph](https://manovaidya.in/autism_landingpage.ph)

 Unlock Free Course instantly

<https://course.manovaidya.com/>

 Start your clarity journey

 For help: **7823838638**

Reply **CALL** if you want us to try again.

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## **MESSAGE 3 — Next Day (Soft urgency + safety)**

Just checking in...

Your child's improvement journey can begin with just ONE session.

Book your consultation and unlock the free course before slots fill.

<https://course.manovaidya.com/>

**FOR APPOINTMENT**

[https://manovaidya.in/autism\\_landingpage.ph](https://manovaidya.in/autism_landingpage.ph)

 Or call: **7823838638**

Reply **BOOK** if you want today's slot.

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## **SEQUENCE A2 — CALL PICKED BUT NO CONSULTATION BOOKED**

**Trigger:** CALL\_PICKED + NO\_BOOKING

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## **MESSAGE 1 — Immediate (Reinforce Value)**

Thank you for talking with us 

To begin your journey, please book the  
₹599 Consultation + Free Autism Breakthrough Course.

This is the step that gives you REAL clarity.



Free Course

<https://course.manovaidya.com/>

#### FOR APPOINTMENT

[https://manovaidya.in/autism\\_landingpage.php](https://manovaidya.in/autism_landingpage.php)



Manual booking help: **7823838638** (10 AM–7 PM)

Reply **READY** to proceed.

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## MESSAGE 2 — 3 Hours Later (Address hesitation)

Most parents delay because they feel unsure.  
But clarity comes only after consultation, not before.

Don't stay confused.  
Start with this one session.



Free Course

<https://course.manovaidya.com/>

#### FOR APPOINTMENT

[https://manovaidya.in/autism\\_landingpage.php](https://manovaidya.in/autism_landingpage.php)



Or call: **7823838638**

Reply **YES** for today's availability.

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## MESSAGE 3 — Next Morning

Imagine 30 days from now...

- Better behaviour
- Better routine
- Better connection
- More calmness

This journey begins with ONE decision.



**Free Course**

<https://course.manovaidya.com/>

**FOR APPOINTMENT**

[https://manovaidya.in/autism\\_landingpage.php](https://manovaidya.in/autism_landingpage.php)

7823838638

Reply **START** if you want to begin.

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## ★ SEQUENCE B — CONSULTATION PREPARATION

**Trigger:** CONSULTATION\_BOOKED

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### ◆ MESSAGE 1 — Immediately (Instructions)

Great! Your consultation is confirmed

Before the session:

- 1 Watch the FREE Course
- 2 Complete the assignments
- 3 Keep your questions ready
- 4 Sit in a quiet place



**Free Course**

<https://course.manovaidya.com/>

## FOR APPOINTMENT

[https://manovaidya.in/autism\\_landingpage.php](https://manovaidya.in/autism_landingpage.php)



**VIDEO:** “How to Prepare for Consultation”

📞 If you need to change timing, call: **7823838638**

Reply **STARTED** once you begin.

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## ◆ MESSAGE 2 — 24 Hours Before

Your consultation is tomorrow.

Please complete:

- ✓ Free Course
- ✓ Assignments
- ✓ Notes
- ✓ Behaviour video (optional)

Join prepared. This helps us guide you better 🤍

📞 Any changes? Call: **7823838638**

Reply **READY** once prepared.

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## ◆ MESSAGE 3 — 2 Hours Before

Your session begins in 2 hours.

Checklist:

- ✓ Internet ready
- ✓ Quiet space
- ✓ Course watched
- ✓ Assignments done

🎥 Video: “Quick Session Checklist”

Reply **SET** if all ready.

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## ◆ MESSAGE 4 — 10 Min Before

Your consultation starts in 10 minutes ❤️

Please join on time so we can discuss everything properly.

 [Meeting Link]

 If any issue: **7823838638**

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## ★ SEQUENCE C — CONSULTATION NOT ATTENDED

**Trigger:** CONSULTATION\_NO\_SHOW

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## ◆ MESSAGE 1 — Immediately

Hi 

We missed you in the consultation today.

Hope everything is fine.

Let's reschedule your session.

Your free course remains active.

 Rebook here: [Link]

 Optional Video: "How to Rebook Your Session"

 Or call: **7823838638**

Reply **RESCHEDULE** if you want a new slot.

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## ◆ MESSAGE 2 — Next Morning (Guilt-free re-engagement)

Please don't feel bad about missing the session.  
Life happens.  
We are here for you ❤️

Let's book a new time that suits you.



Reply **TIME** for your preferred timing.

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## ◆ MESSAGE 3 — Day 2 (Soft urgency)

This session gives you the clarity you were looking for about your child.

Slots are limited—book when ready.



Reply **YES** if you want help.

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## ★ SEQUENCE D — CONSULTATION DONE → PACKAGE NOT PURCHASED (NLP)

**Trigger:** CONSULTATION\_DONE\_NO\_PACKAGE

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## ◆ MESSAGE 1 — Immediately (NLP: identity + hope)

It was wonderful speaking with you today ❤️

You took the biggest step — seeking clarity for your child.  
Now the next step is starting the Manovaidya Improvement Program.

This is where structured change begins.

 Payment Link: [insert]

 If you have questions, call: **7823838638**

Reply **READY** if you want to begin.

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## **MESSAGE 2 — 4 Hours Later (Resolve conflict)**

It's natural to feel confused after a consultation.

But delaying the next step only delays results.

Let's move forward one step at a time.

You're not alone 

 [Link]

 7823838638

Reply **CLARITY** if you want help.

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## **MESSAGE 3 — Next Morning (Future pacing)**

Imagine your child 90 days from now...

- More settled
- Less behavioural difficulty
- More responsiveness
- Better routine
- More connection

This is possible.

Your journey starts with the program.

 [Link]

 7823838638

Reply **START** if you're ready.

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## ◆ MESSAGE 4 — Final (Open door)

I won't disturb you with more messages ❤️

But whenever you're ready to begin the structured improvement system,  
use this link:

 [Link]

Just message **HI** anytime for help.

 Or call: **7823838638**

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## 1 Updated Funnel Stages (New Model)

Funnel now:

1. **Lead Generated** → added to **Leads\_Master**
  2. **SEQUENCE 0** – New Lead → Education + Free Course incentive + push to **book consultation**
  3. **SEQUENCE A1** – Call attempted, **not picked**
  4. **SEQUENCE A2** – Call picked, **no consultation booked**
  5. **SEQUENCE B** – **Consultation booked** → preparation + course + assignments
  6. **SEQUENCE C** – **Consultation not attended** (No-show)
  7. **SEQUENCE D** – **Consultation attended, package NOT purchased**
  8. **PACKAGE\_PURCHASED** → move to **Patients\_Master** + start Patient Onboarding  
(we'll build later)
- 

## 2 Google Sheet – Updated Structure & Stages

 TAB 1 — **Leads\_Master**

### **Columns (copy-paste):**

Lead ID  
Lead Date  
Lead Source  
Lead Type  
Parent Name  
Child Name  
Child Age  
Phone  
City  
Lead Stage  
Assigned Sales Person  
Call Status  
Nurture Sequence Running  
Last Message Sent  
Next Action Needed  
Consultation Status  
Package Status  
Doctor Notes  
Parent Concerns Summary  
Tags (AiSensy)  
Follow-up Date  
Comments

### **Updated Dropdowns**

#### **Lead Stage – use these values:**

New Lead  
Sequence 0  
Call Attempted  
Call Not Picked  
Call Picked – No Booking  
Consultation Booked  
Consultation Completed – No Package  
Package Purchased  
Onboarding  
Active Patient

Inactive / Lost  
Reactivation Running

**Consultation Status:**

Not Booked  
Booked  
Done  
No Show

**Package Status:**

Not Purchased  
Purchased  
Onboarding  
Active  
Completed  
Dropped

**Nurture Sequence Running:**

Seq-0 (New Lead)  
Seq-A1 (Call Not Picked)  
Seq-A2 (Call Picked – No Booking)  
Seq-B (Consult Prep)  
Seq-C (Consult No-Show)  
Seq-D (Consult Done – No Package)  
Reactivation (Seq-6)  
Patient Weekly (Seq-7)  
None

**Next Action Needed:**

Call  
WhatsApp Message  
Send Booking Link  
Move to Next Sequence

Hold  
Follow-up Tomorrow  
Stop Messages  
Needs Doctor Input  
Assign to Counselor  
Assign to Om

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## ● TAB 2 — Patients\_Master (just for context)

Patient ID  
Lead ID  
Parent Name  
Child Name  
Phone  
City  
Start Date  
Plan Type  
Current Status  
Week Number  
Last Tracker Updated On  
Doctor in Charge  
WhatsApp Tag  
Next Review Due  
Remarks

Current Status examples:

Onboarding Pending  
Active  
Paused  
Dropped  
Completed  
Reactivation Running

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## ● TAB 2 — Automation\_Tags (AiSensy/Pabbly Mapping)

**Columns:**

Sequence Name  
 Trigger Condition (Sheet + Tag)  
 Start Tag  
 Stop Tag  
 Next Tag  
 Automation Action

I'll fill for all your active sales sequences:

Sequence Name	Trigger Condition (Sheet + Tag)	Start Tag	Stop Tag	Next Tag	Automation Action
SEQ-0 New Lead	New row in Leads_Master with Lead Stage = New Lead	new_lead	consult_booked or package_purchased	call_attempted / seq_a1	Start Sequence 0 messages
SEQ-A1 Call Not Picked	Call Status = Not Connected AND Lead Stage = Call Attempted	call_not_picked	consult_booked	seq_a2 or reactivation	Start A1 messages (No-pick up)
SEQ-A2 Call Picked - No Booking	Call Status = Connected AND Consultation Status =	call_picked_no_booking	consult_booked	reactivation	Start A2 messages

	Not Booked				
SEQ-B Consultation Prep	Consultation booked Status = Booked	consultation_booked	consultation_no_show	seq_c or seq_d	Start B messages
SEQ-C Consultation No-Show	Consultation no show Status = No Show	consultation_no_show	consultation_booked or package_purchased	reactivation	Start C messages
SEQ-D Consultation Done – No Package	Consultation done_no_package Status = Done AND Package Status = Not Purchased	consultation_done_no_package	package_purchased	reactivation	Start D messages
Reactivation (Seq-6)	Lead Stage = Inactive / Lost	reactivation	consultation_booked or package_purchased	seq_b or patient_on_boarding	Start long-term reactivation
Patient Weekly (Seq-7)	Row moved to Patients Master, Current Status = Active	patient_active	patient_stopped	weekly_cycle	Start weekly patient flows

Om's job: implement these **conditions + tags** in Pabbly/AiSensy.

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### 3 Sequence-wise CTA & Trigger Logic (Very Clear for Om)

Now I'll map **each sequence**:

- Where it **starts** (Google Sheet condition + tag)
  - Which **CTAs** exist inside messages
  - What **each CTA does** in the system
  - What **updates** happen in the Google Sheet
  - Which **next tag/sequence** to fire
- 

## ★ SEQUENCE 0 — NEW LEAD EDUCATION + FREE COURSE INCENTIVE

**Trigger:**

- New row in `Leads_Master`
- `Lead Stage = New Lead`
- Pabbly sets tag `new_lead` and updates `Nurture Sequence Running = Seq-0`

**Main CTAs inside messages:**

- `HI`
- `COURSE`
- `READY`
- `HELP`
- `QUESTION`
- `YES`
- Clicking **Booking Link**

- ◆ **CTA Logic:**

1. **User clicks Booking Link (Consultation @ ₹599)**

- Payment success webhook → Pabbly:
  - Update `Consultation Status` = Booked
  - Update `Lead Stage` = Consultation Booked
  - Update `Nurture Sequence Running` = Seq-B
  - Add tag `consultation_booked`, stop tag `new_lead`
  - **Start SEQUENCE B (Consultation Preparation)**

2. **User replies HI**

- Bot sends **short explainer** (what Manovaidya does + how the process works)
- No sheet change needed

3. **User replies COURSE**

- Bot sends **course details + booking link**
- Same row, no stage change

4. **User replies HELP or QUESTION**

- Bot sends FAQs
- Optionally, add `Next Action Needed` = Call for manual follow-up

5. **User replies READY or YES**

- Bot re-sends **booking link**
- Optionally assign to `Assigned Sales Person` for priority call

If no booking + no call update after 24–36 hours:

- Pabbly keeps **Lead Stage** = **New Lead** but
  - **Nurture Sequence Running** can move to Reactivation or Om can decide to trigger A1/A2 after call attempt.
- 

## ★ SEQUENCE A1 — CALL NOT PICKED

**Trigger (set manually or via dialer webhook):**

- **Lead Stage** = **Call Attempted**
- **Call Status** = **Not Connected**
- Tag: **call\_not\_picked**
- **Nurture Sequence Running** = Seq-A1

**CTAs:**

- **TIME**
- **CALL**
- Clicking booking link

♦ **CTA Logic:**

1. **User replies TIME**

- UPDATE in **Leads\_Master** → **Follow-up Date** with preferred time
- Set **Next Action Needed** = **Call**

2. **User replies CALL**

- Set **Next Action Needed** = **Call**

- Pre-counsellor uses Sales Call Management tab to schedule

### 3. User clicks booking link

- Same as Sequence 0:
  - Consultation Status = Booked
  - Lead Stage = Consultation Booked
  - Stop tag call\_not\_picked, start tag consultation\_booked
  - Start **Sequence B**

If still no answer after A1 sequence:

- Om can set Lead Stage = Inactive / Lost
- Nurture Sequence Running = Reactivation
- Start **Reactivation Sequence (Seq-6)**

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## ★ SEQUENCE A2 — CALL PICKED BUT NO CONSULTATION BOOKED

**Trigger:**

- Call Status = Connected
- Consultation Status = Not Booked
- Lead Stage = Call Picked – No Booking
- Nurture Sequence Running = Seq-A2
- Tag: call\_picked\_no\_booking

**CTAs:**

- READY
  - YES
  - START
  - Clicking booking link
- ◆ CTA Logic:
1. Booking Link Click + Payment Success
    - Consultation Status = Booked
    - Lead Stage = Consultation Booked
    - Nurture Sequence Running = Seq-B
    - Tags: stop `call_picked_no_booking`, start `consultation_booked`
    - Start Sequence B
  2. User replies READY, YES, or START
    - Bot prioritises booking link again
    - Optionally set Next Action Needed = Call to do a quick follow-up call

If no booking after A2:

- Om can set Lead Stage = Inactive / Lost
- Start Reactivation (Seq-6)

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## ★ SEQUENCE B — CONSULTATION PREPARATION (With Free Course)

Trigger:

- Payment gateway webhook or manual update
- `Consultation Status = Booked`
- `Lead Stage = Consultation Booked`
- `Nurture Sequence Running = Seq-B`
- Tag: `consultation_booked`

#### CTAs:

- `STARTED`
- `READY`
- `SET`

These are mostly **engagement markers** (no stage change), but you can:

- Use them to track seriousness
- Optional: if `STARTED/READY/SET` not received, send reminder or mark `Next Action Needed = Call` day before session.

**Important automation:** After scheduled consultation time, your system (or team) needs to update:

- `Consultation Status = Done OR No Show`

This will trigger either **Sequence C** or **Sequence D**.

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## ★ SEQUENCE C — CONSULTATION NOT ATTENDED (NO-SHOW)

Trigger:

- Consultation Status = No Show
- Lead Stage can remain Consultation Booked OR change to Consultation No Show
- Nurture Sequence Running = Seq-C
- Tag: consultation\_no\_show

**CTAs:**

- RESCHEDULE
- TIME
- Clicking **Rebook link**

◆ **CTA Logic:**

1. **User clicks Rebook link**

- New slot booked
- Consultation Status = Booked
- Keep Lead Stage = Consultation Booked
- Tags: stop consultation\_no\_show, start consultation\_booked
- Restart **Sequence B**

2. **User replies RESCHEDULE or TIME**

- Move to manual scheduling:
  - Set Next Action Needed = Call
  - Set Follow-up Date as requested

If they never reschedule even after Sequence C:

- You may mark **Lead Stage = Inactive / Lost**
  - Start **Reactivation Sequence**
- 

## ★ SEQUENCE D — CONSULTATION DONE → PACKAGE NOT PURCHASED

Trigger:

- Consultation Status = Done
- AND Package Status = Not Purchased
- Lead Stage = Consultation Completed – No Package
- Nurture Sequence Running = Seq-D
- Tag: **consultation\_done\_no\_package**

CTAs:

- READY
  - CLARITY
  - START
  - BOOK
  - Clicking **Payment link**
- ◆ **CTA Logic:**
1. **User clicks Payment Link (Package Purchase)**

- Pabbly/payment webhook updates:
  - Package Status = Purchased
  - Lead Stage = Package Purchased
  - Nurture Sequence Running = Patient Onboarding / Seq-7 later
  - Tag: package\_purchased
- Row is either:
  - Marked for move to Patients\_Master (via Pabbly), OR
  - Automatically duplicated/moved
- Sales sequences stop; patient onboarding will start.

## 2. User replies CLARITY or asks doubts

- Either bot sends FAQ + reassurance
- Or you set Next Action Needed = Call for a human to handle objections

## 3. User replies READY / START / BOOK

- Bot re-sends payment link
- Optionally, create hot lead marker for quick follow up

If still no purchase after Sequence D:

- Keep Lead Stage = Consultation Completed – No Package
  - Set Nurture Sequence Running = Reactivation
-

## 4 Ready-to-Copy Google Sheet Templates (Updated)

You can use these verbatim when creating your sheet.

### ◆ TAB 1 – Leads\_Master (Headers)

Lead ID  
Lead Date  
Lead Source  
Lead Type  
Parent Name  
Child Name  
Child Age  
Phone  
City  
Lead Stage  
Assigned Sales Person  
Call Status  
Nurture Sequence Running  
Last Message Sent  
Next Action Needed  
Consultation Status  
Package Status  
Doctor Notes  
Parent Concerns Summary  
Tags (AiSensy)  
Follow-up Date  
Comments

### ◆ TAB 2 – Automation\_Tags

Sequence Name  
Trigger Condition (Sheet + Tag)  
Start Tag  
Stop Tag  
Next Tag  
Automation Action

◆ TAB 3 – Sequence\_Tracker

Lead ID  
Parent Name  
Current Sequence  
Start Date  
End Date  
Completed?  
Comments

(Useful for Om to debug which sequence is active)

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◆ TAB 4 – Sales\_Call\_Management

Lead ID  
Parent Name  
Phone  
Call Attempt #  
Status  
Remarks  
Next Action  
Follow-up Date

Status options:

Not Connected  
Call Back Later  
Connected  
Interested  
Not Interested  
Consultation Booked  
Wants Time  
Wrong Number

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◆ TAB 5 – Consultation\_Management

Lead ID  
Parent Name  
Consultation Date  
Consultation Mode (Online/Clinic)  
Key Observations  
Doctor Notes  
Final Recommendation  
Eligibility (for package)  
Package Offered  
Decision  
Next Action

---

◆ **TAB 6 – Patients\_Master (As above)**

Patient ID  
Lead ID  
Parent Name  
Child Name  
Phone  
City  
Start Date  
Plan Type  
Current Status  
Week Number  
Last Tracker Updated On  
Doctor in Charge  
WhatsApp Tag  
Next Review Due  
Remarks