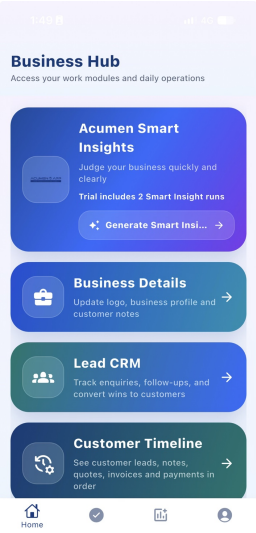
ACUMEN APP

JUDGE THINGS QUICKLY AND CLEARLY

YOUR BUSINESS IS BUSY.
BUT IS IT GROWING?

SEE WHAT YOUR BUSINESS IS MISSING.

One mobile business operating system for leads, customers, projects, tasks, teams, quotations, invoices, collections and actionable Smart Insights.



ORGANIZE
Sales, delivery and billing

UNDERSTAND
Risks, opportunities and priorities

ACT
On what matters most today

15-DAY FREE TRIAL • ANDROID & iOS

www.acumensmartinsights.com

THE CHALLENGE

Growth gets lost between the details.

Even an active business can lose opportunities when everyday work is disconnected.

Inquiries without follow-ups

A promising inquiry arrives, but no one knows who should call next.

Projects without visibility

Tasks are delayed while owners discover problems too late.

Billing without collection clarity

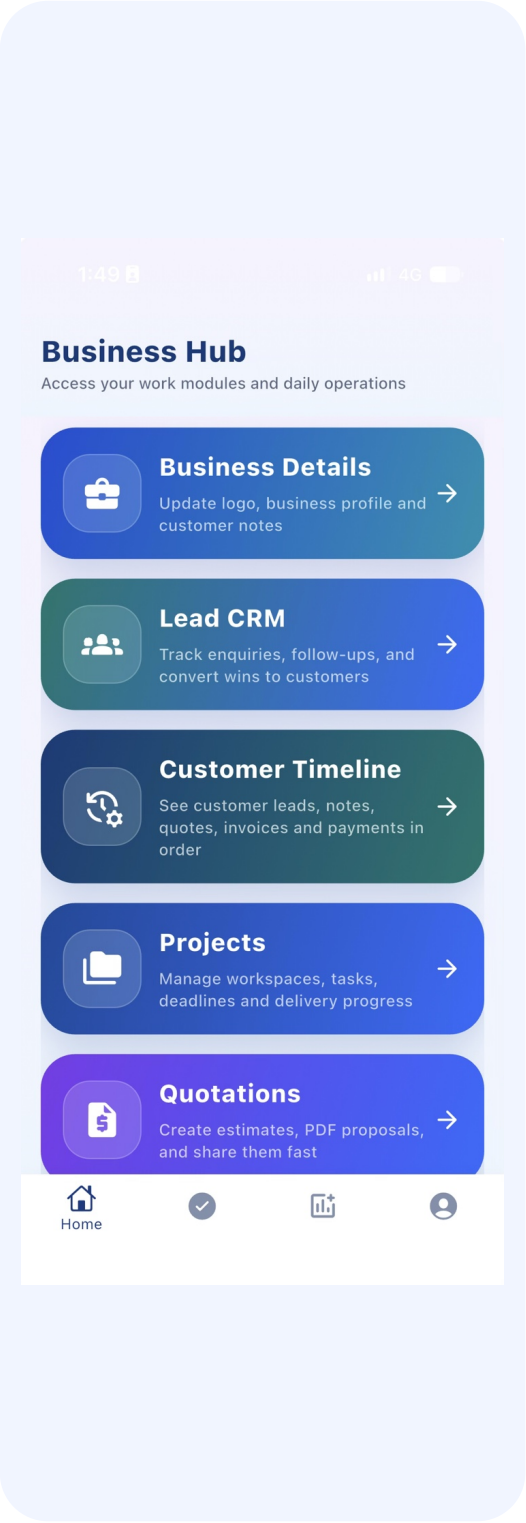
Invoices are raised, yet unpaid balances and follow-ups remain scattered.

Teams without accountability

Responsibilities, deadlines and work activity become hard to track.

Decisions without context

Owners need more than scattered numbers; they need to know what to do next.



THE ACUMEN APPROACH

One connected business journey.

Move from first inquiry to customer relationship, delivery, billing and insight in a single mobile workflow.

01 Capture and qualify

Record incoming leads, their sources, notes, stages and next follow-up.

02 Quote and confirm

Prepare professional estimates, track quotation status and share PDFs.

03 Deliver and collaborate

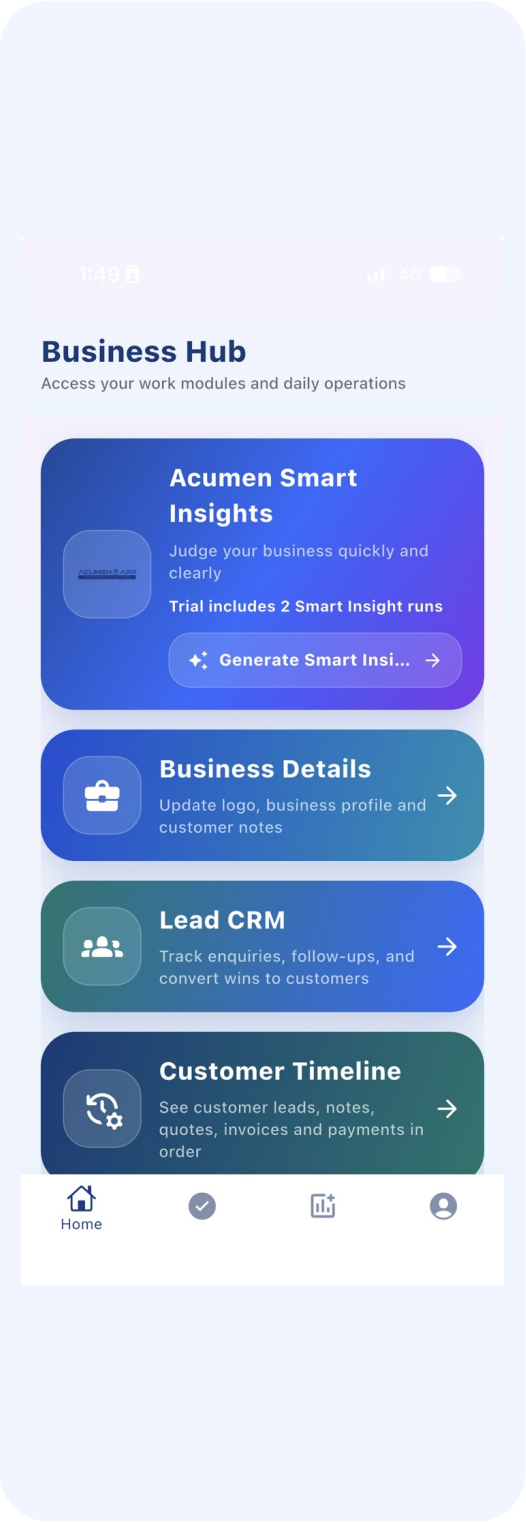
Create projects, assign tasks, track progress and monitor deadlines.

04 Invoice and collect

Create invoices, record payments and keep outstanding amounts visible.

05 Learn and improve

Review business performance and generate Smart Insights to identify priority actions.



SALES MANAGEMENT

Turn inquiries into relationships.

Lead CRM helps your team manage the next conversation instead of relying on memory.

Lead capture and sources

Manage inquiries received through WhatsApp, Instagram, websites, referrals, walk-ins and calls.

Notes and conversations

Keep customer context and follow-up notes attached to the lead.

Pipeline status

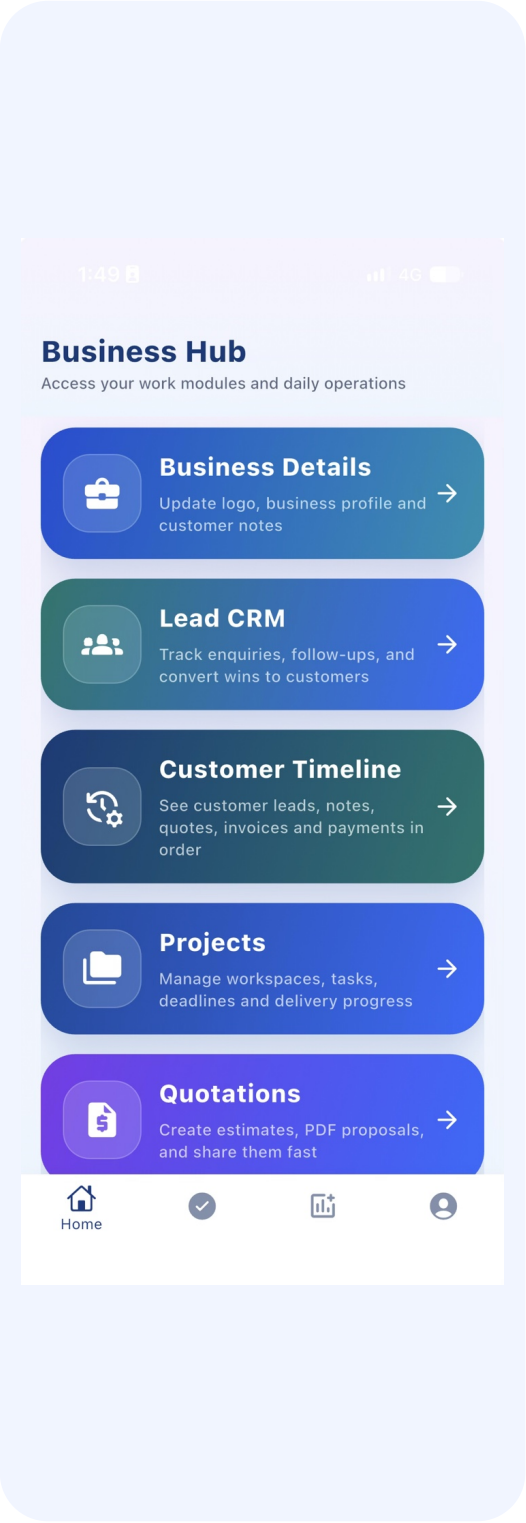
Track New, Contacted, Interested, Quotation Sent, Won and Lost stages.

Lead-to-customer conversion

Convert confirmed opportunities into customer records without losing context.

Follow-up discipline

Schedule the next action so promising inquiries are less likely to go cold.



CUSTOMER RELATIONSHIPS

Know the story behind every customer.

See the relationship, not just the contact details.

Customer Timeline

Review leads, notes, quotations, invoices, payments and follow-ups in sequence.

Search and customer profiles

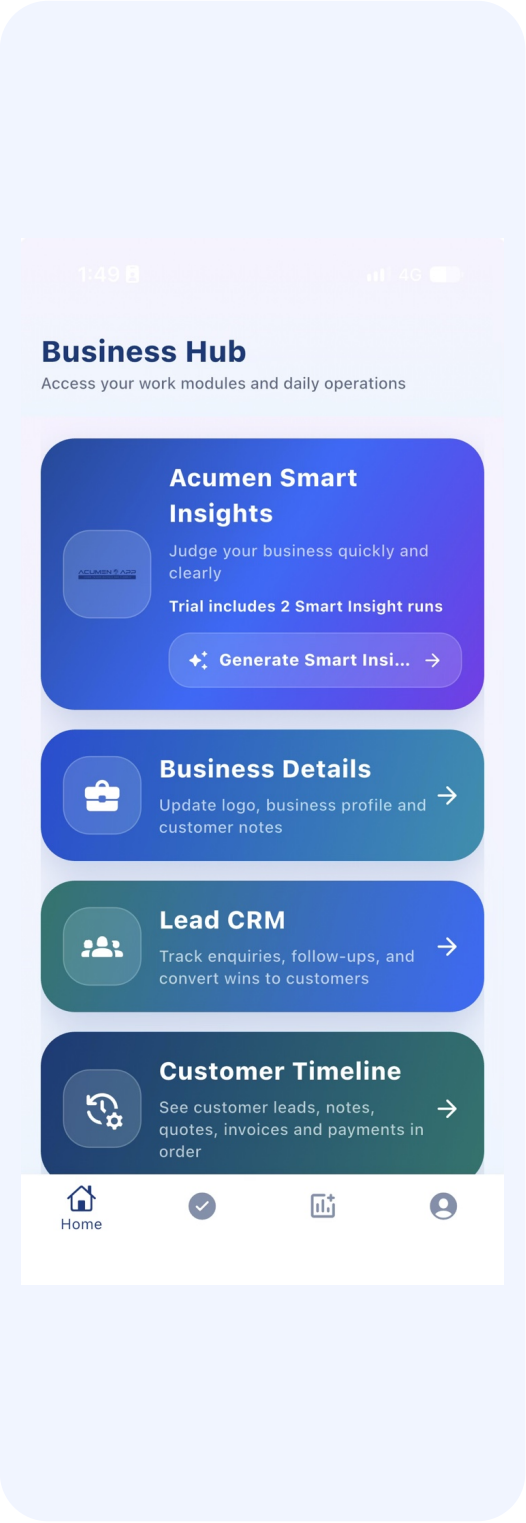
Find the right customer and understand the history before calling.

Shared context

Help authorized team members continue conversations with relevant background.

Better service continuity

Make follow-ups more informed when multiple people serve the same customer.



PROJECT DELIVERY

Make project progress visible.

Organize delivery into projects, responsibilities and measurable progress.

Project workspaces

Create and manage projects from kickoff to completion.

Assignment and ownership

Associate work with team members and see who is responsible.

Deadlines and progress

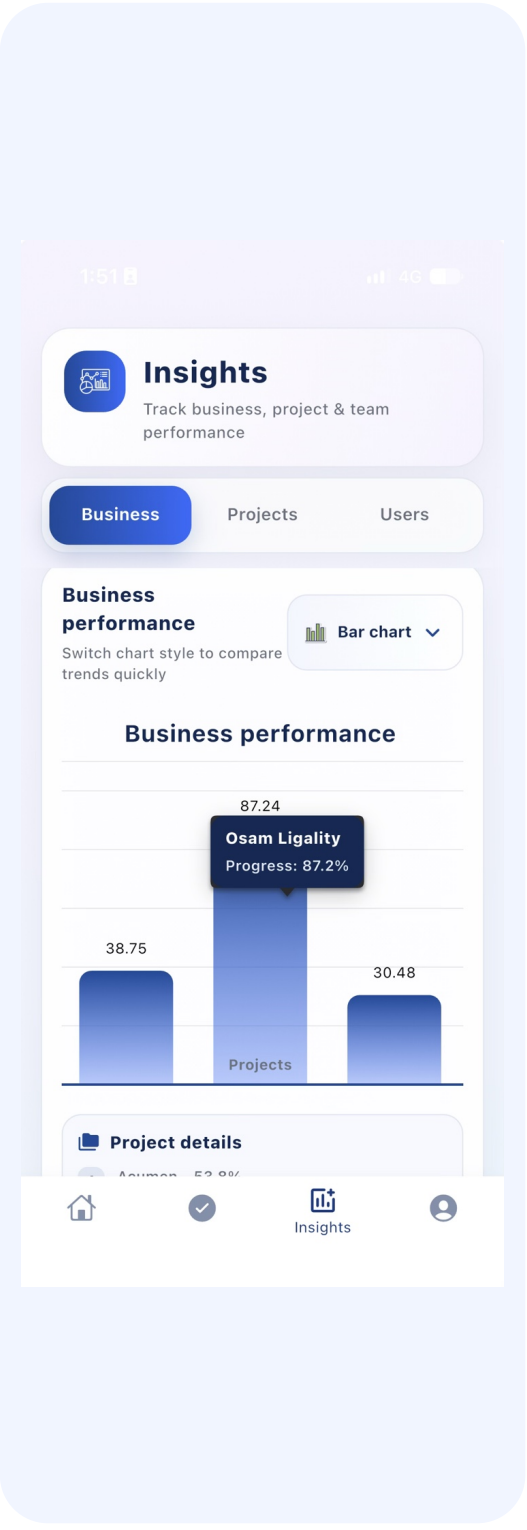
Monitor progress and keep delivery dates in view.

Project insights

Review project counts, active work, completion metrics and progress charts.

Connected workflow

Move from an accepted quotation toward the project or invoice workflow where applicable.



DAILY PRODUCTIVITY

Every task needs an owner and a next step.

The My Task screen shows work grouped by status with due dates and progress.

Clear task boards

View To Do, In Progress, Completed and Archived work.

Due dates and assignees

Identify task ownership and upcoming commitments.

Comments and context

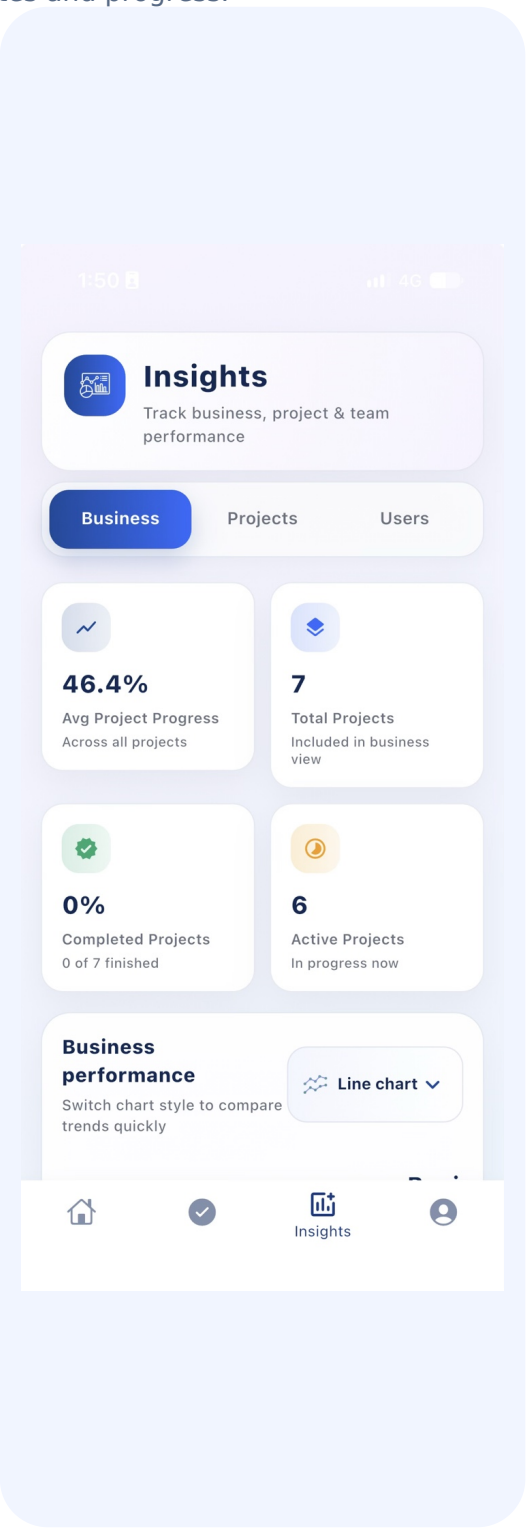
Keep task conversations attached to the work.

Progress monitoring

See progress percentages and project association.

Workload clarity

Spot overdue work and prioritize reassignment when needed.



PEOPLE AND PERMISSIONS

Build a more accountable team.

Give users appropriate access and maintain a clearer picture of team activity.

Organization settings

Maintain organization details and configuration.

User management

Add, edit and manage workspace users.

Roles and permissions

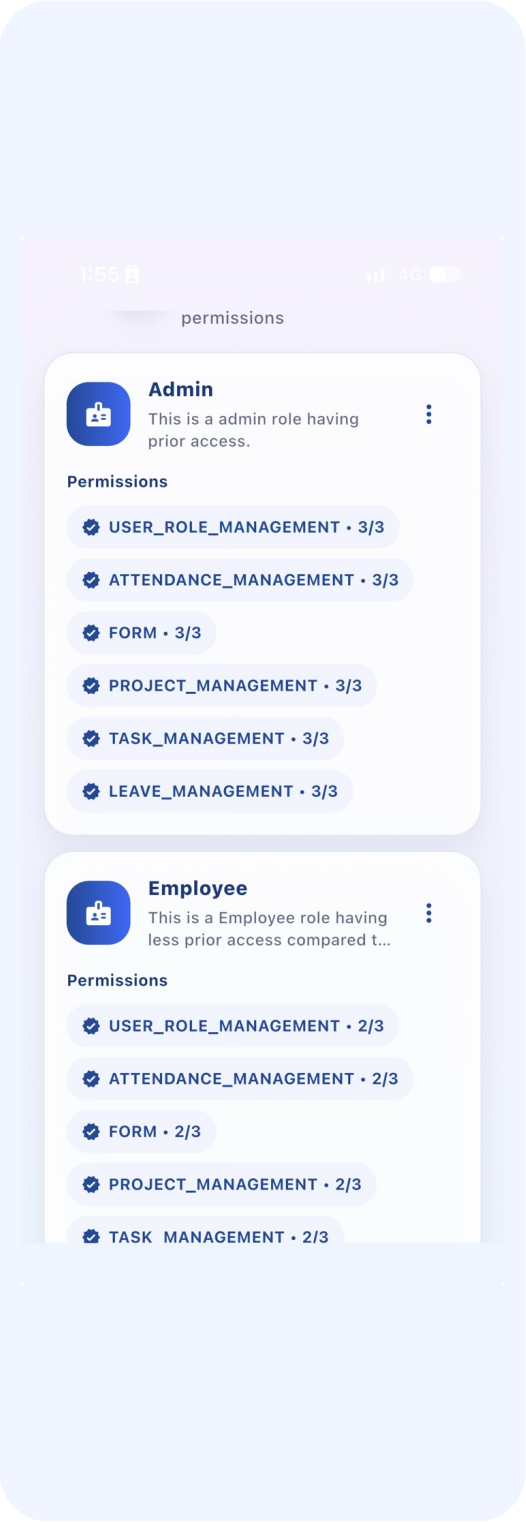
Manage Admin, Manager and Employee roles and feature-level permissions.

Controlled access

Different roles can have different levels of access to project, task, attendance and other modules.

Role administration

Review existing permissions and add roles as needed.



ATTENDANCE

Know when work starts, stops and pauses.

Attendance is shown with date-wise activity, work duration, breaks and recorded location.

Work start and end

Employees can record the start and end of their work sessions.

Work and break time

Review work duration and break-related activity.

Date-wise attendance

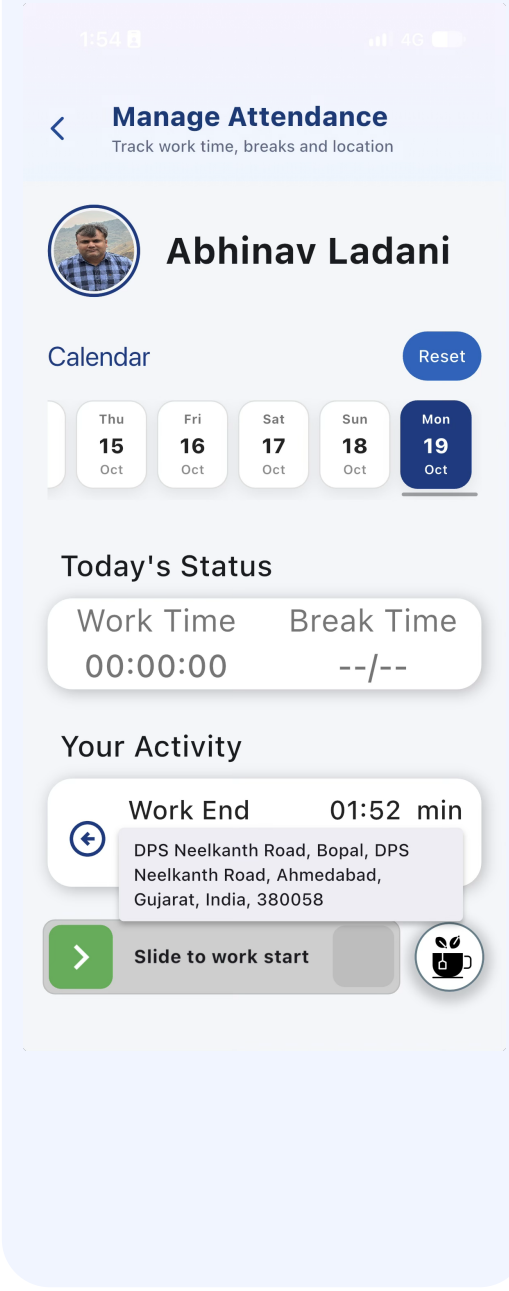
Use the calendar to view a selected day.

Recorded location

View location information associated with recorded attendance activity.

Responsible use

Location-related features should be configured and communicated transparently to employees.



QUOTATIONS

Create a professional first impression.

Move from a verbal estimate to a structured, shareable proposal.

Estimates with business details

Prepare quotations with GST, discounts, terms and validity.

PDF sharing

Share quotation documents by WhatsApp or email.

Quotation status

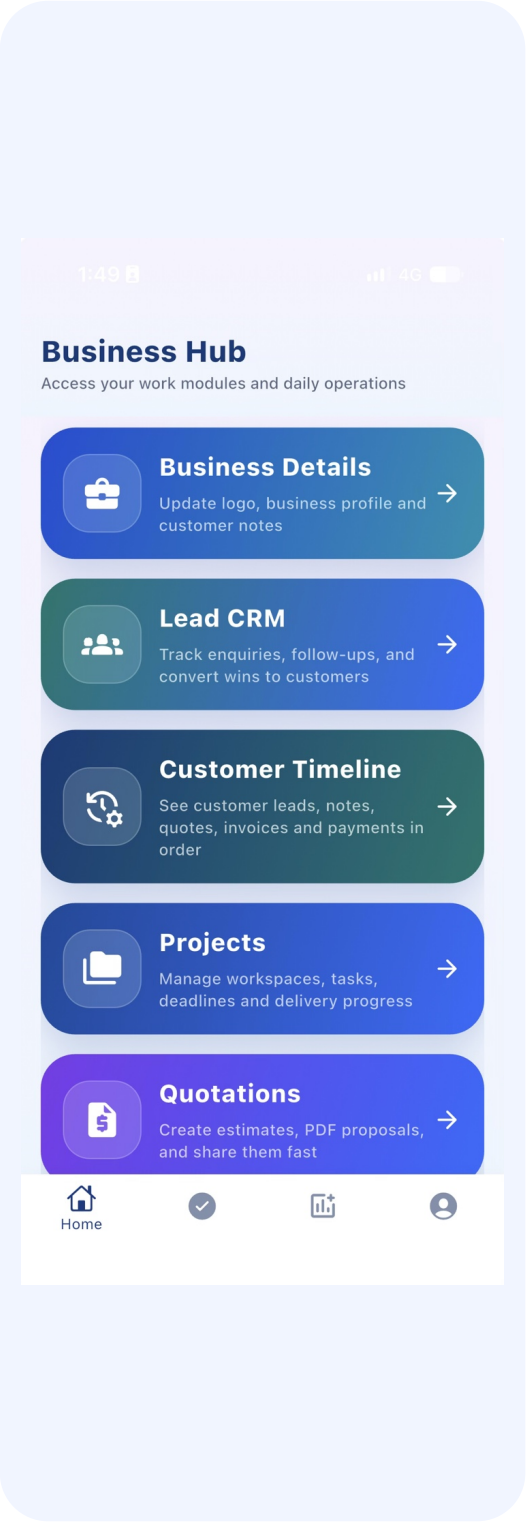
Follow Draft, Sent, Accepted, Rejected and Expired stages.

Reduce duplicate entry

Use supported quotation-to-project or quotation-to-invoice workflows.

Timely follow-up

Spot quotations that need a response or are approaching expiry.



INVOICING AND COLLECTIONS

Revenue matters when it gets collected.

Track bills, dues and payments without losing sight of the customer relationship.

Invoice creation

Prepare invoices with GST support for relevant Indian business workflows.

Share invoices

Generate PDFs and share invoices through WhatsApp or email.

Payment options

Include UPI and payment-link information where configured.

Payment status

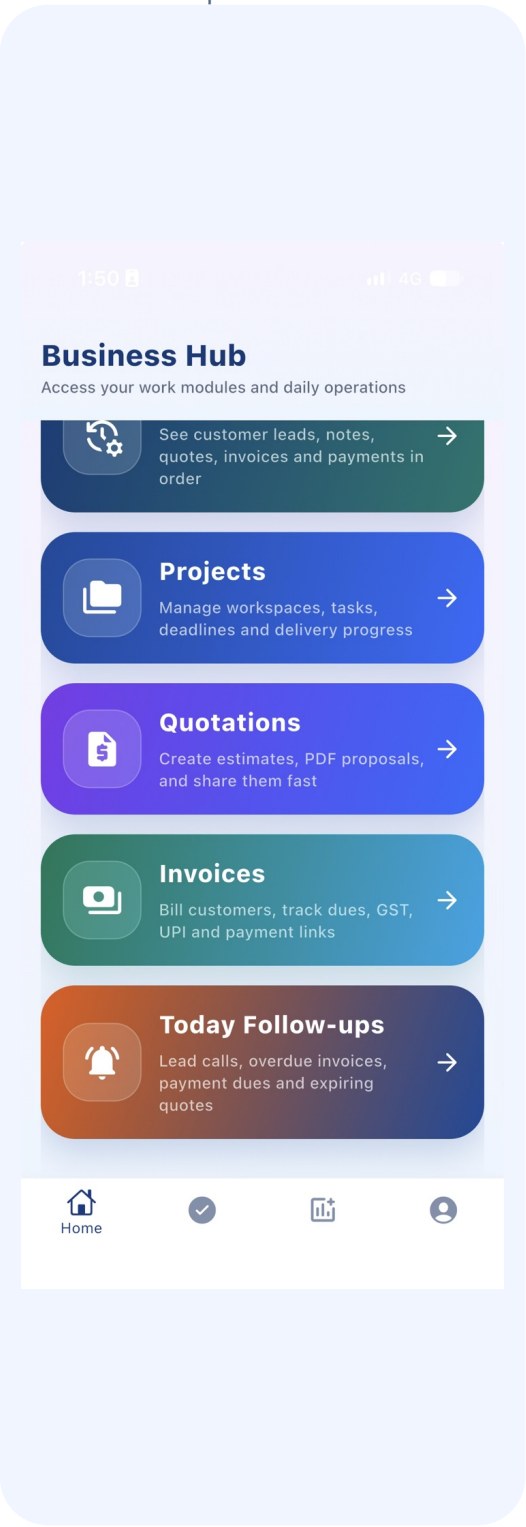
Track Unpaid, Partially Paid, Paid and Overdue invoices.

Partial and milestone payments

Record advances, part-payments and final settlement activity.

Collections visibility

Review pending amounts, overdue dues and collection summaries.



DAILY FOCUS

Start each day knowing what needs attention.

Today Follow-ups connects commercial and operational reminders.

Lead calls

See scheduled customer and prospect follow-ups.

Overdue invoices

Bring outstanding payments into the daily action list.

Payment reminders

Follow up on amounts due rather than waiting for customers to remember.

Expiring quotations

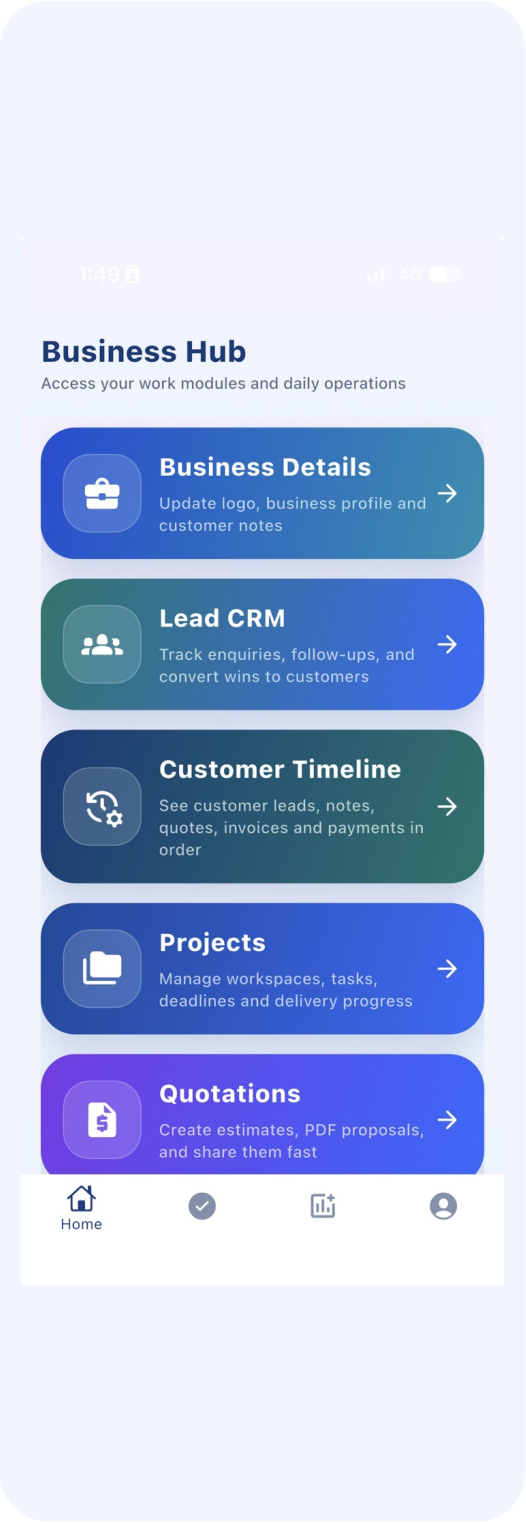
Revisit quotations before opportunities are lost.

Reminder lifecycle

Manage Pending, Done, Snoozed and Cancelled statuses.

Search and filters

Locate records across leads, customers, projects, invoices and payments.



PERFORMANCE VISIBILITY

See the business behind the numbers.

Acumen Insights provides views for business, projects and users.

Business overview

Review project counts, active work and average project progress.

Project performance

Use progress metrics to identify projects needing attention.

User performance

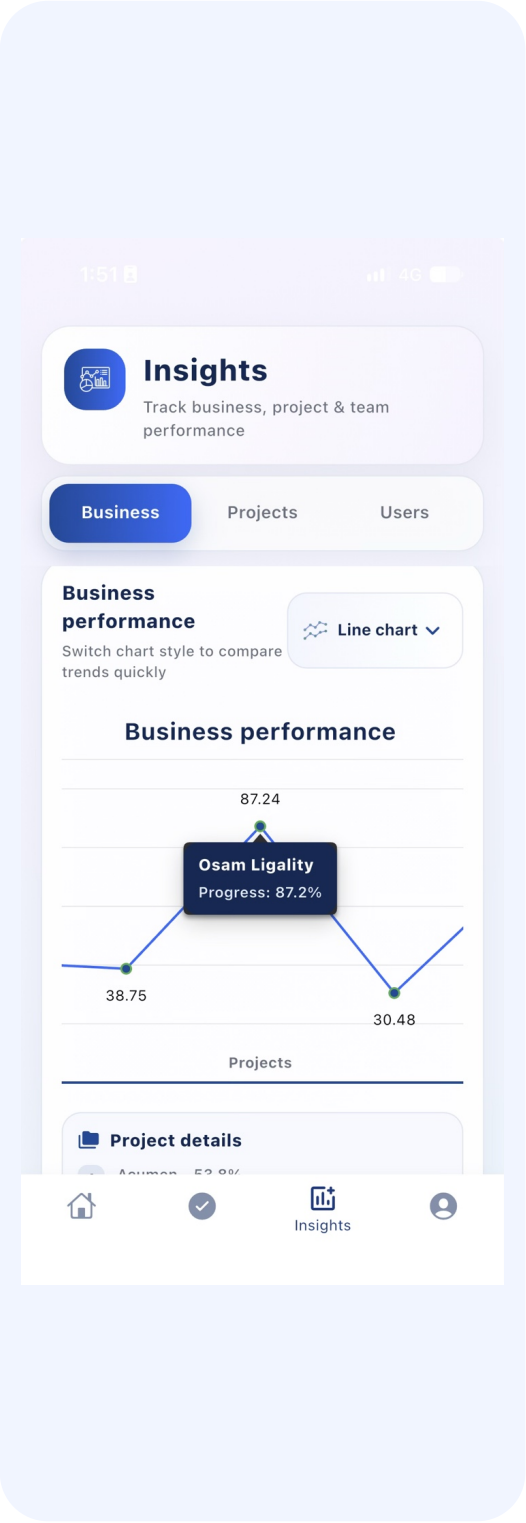
Explore user-oriented performance views where data is available.

Visual comparisons

Switch between line and bar chart styles in the performance screen.

Mobile-first access

Review important operational information from your phone.



AI-POWERED INTELLIGENCE

Your business data. Clearer next actions.

Acumen Smart Insights turns recorded activity into a structured business review.

Business Health Score

The sample report scores the business 65/100, with status Improving and confidence 85/100.

Executive summary

Explains the overall picture and calls out important overdue work and invoices.

Top risks

Highlights overdue invoices and tasks as high priority and pending lead follow-ups as medium priority.

Quick wins

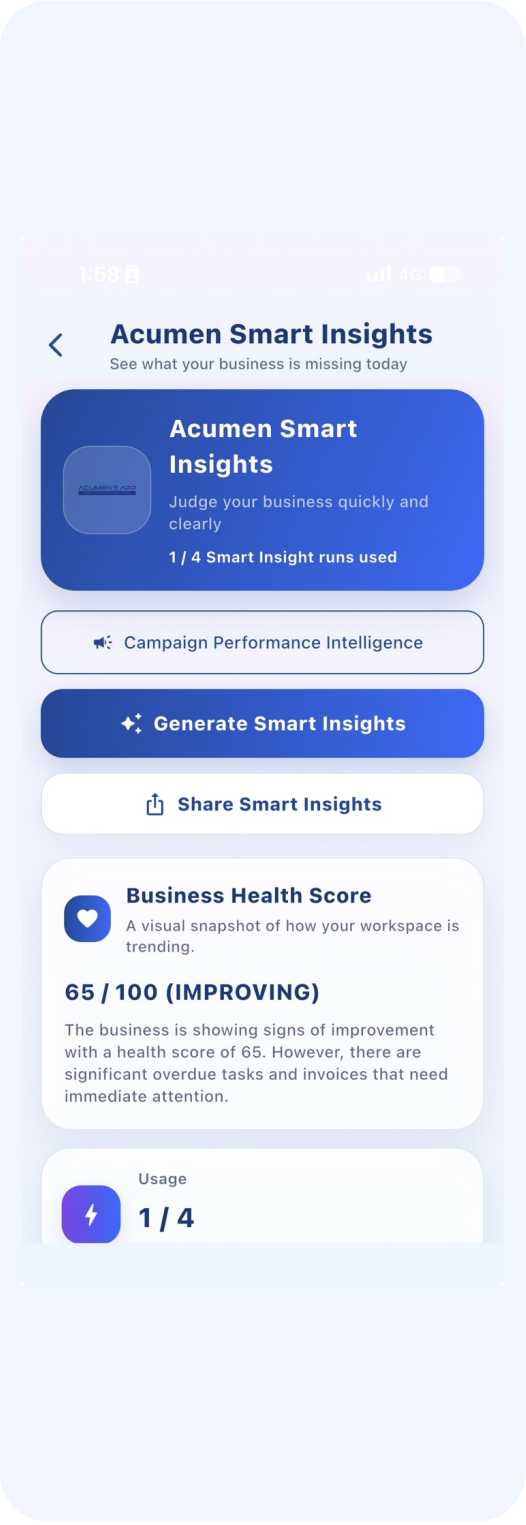
Recommends invoice follow-ups, task reassignment, lead scheduling and quotation reviews.

Opportunities

Suggests improvements in lead conversion, task management and client communication.

Report sharing

Generate and share Smart Insights; usage allowances depend on the plan or trial.



SAMPLE REPORT DEEP DIVE

From a score to an action plan.

Illustrative in-app report supplied by the Acumen team; results vary with workspace data.

65/100 — Improving

The executive summary notes signs of improvement alongside overdue tasks and invoices.

Today’s most important action

Follow up on overdue invoices to support cash flow and reduce outstanding amounts.

HIGH — Overdue invoices

Contact clients with overdue invoices to expedite payment.

HIGH — Overdue tasks

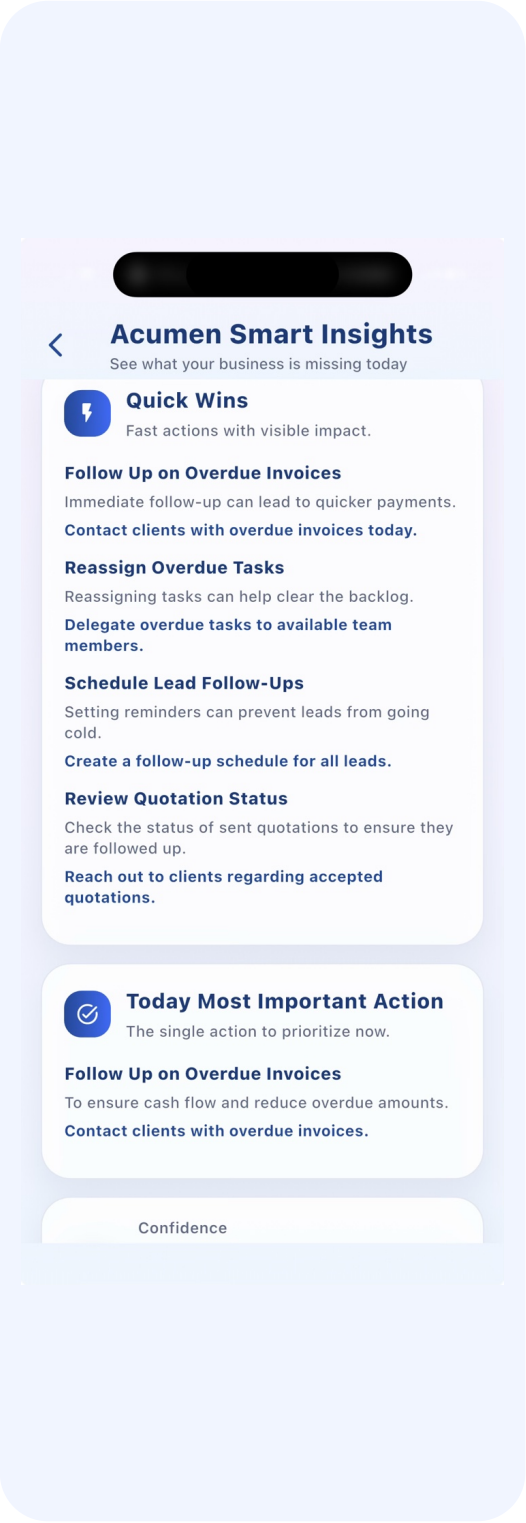
Prioritize overdue work and assign tasks to available team members.

MEDIUM — Pending lead follow-ups

Create a structured reminder schedule for leads requiring contact.

Opportunity — Stronger relationships

Schedule regular client check-ins and review quotation status.



CAMPAIGN INTELLIGENCE

Connect marketing activity with business decisions.

Acumen includes a Campaign Performance Intelligence entry point within Smart Insights.

Campaign performance intelligence

Access the dedicated campaign-focused intelligence section from the Smart Insights screen.

Business context

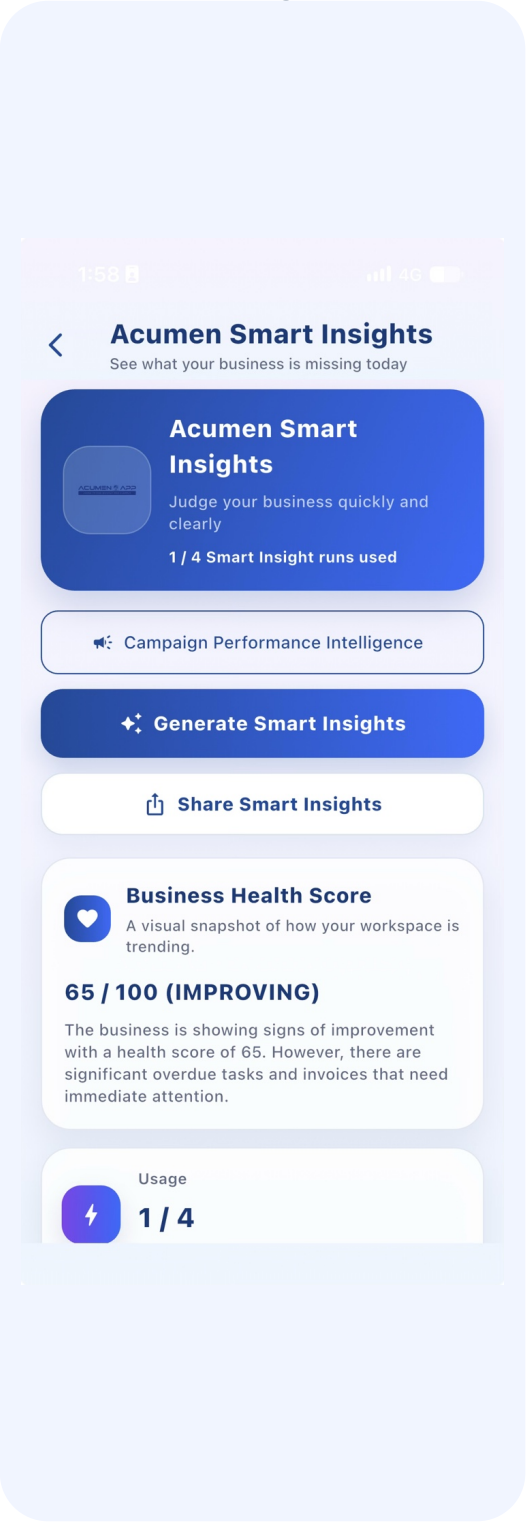
Consider marketing activity alongside lead follow-ups and customer conversion workflows.

Practical questions

Which inquiries need attention? Where are follow-ups delayed? What should the team prioritize?

Important scope note

Specific advertising platform integrations, attribution methods and automated campaign reporting are not demonstrated in the supplied app screenshots and are not claimed here.



ILLUSTRATIVE CUSTOMER JOURNEY

Meet Rivaan Patel.

A realistic fictional example of how a service-business owner could use Acumen; not a verified customer testimonial.

RIVAAN PATEL

Owner • Rivaan Creative Studio (illustrative business)

Rivaan manages a small Ahmedabad design and digital-services team. Customer inquiries, quotations, project deadlines and payment reminders compete for his attention.

MONDAY • A new inquiry

Rivaan records a website inquiry in Lead CRM, adds notes and schedules a follow-up.

TUESDAY • A quotation goes out

He prepares an estimate, shares its PDF and tracks the quotation stage.

THURSDAY • Work begins

He creates a project, assigns design tasks and sets due dates.

NEXT WEEK • The invoice is due

He shares the invoice, records a partial payment and sees the outstanding amount.

FRIDAY • Acumen highlights priorities

Smart Insights points him toward overdue tasks, invoices and pending lead follow-ups.

The value: one connected view of the work that needs attention.

WHO IT IS FOR

Built for hands-on service teams.

Especially useful when a small business handles sales, delivery, billing and collections with a limited team.

Digital and creative agencies

Track inquiries, quotations, projects and team assignments.

Software and IT service companies

Connect client work, tasks, deadlines and invoicing.

Consultants and professional services

Keep customer context, estimates and payment reminders organized.

Contractors and interior designers

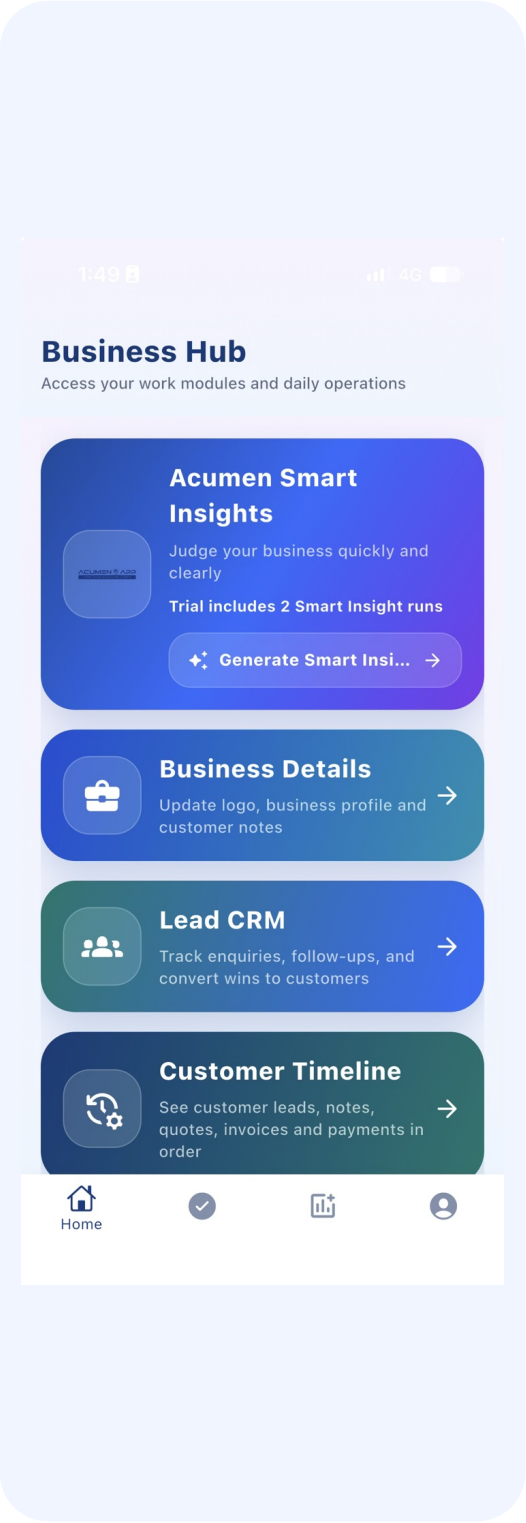
Manage delivery stages, project tasks and milestone payments.

Repair, maintenance and event services

Coordinate incoming jobs, schedules, team work and billing.

Training and other service businesses

Maintain customer follow-ups and business visibility.



FULL CAPABILITY INDEX

Everything in one place.

A complete reference to the 30 capabilities documented in the original Acumen product brochure.

01–05 Administration and work

Organization and users; roles and permissions; projects; tasks; team assignments.

06–09 Lead management

Lead CRM; notes and conversations; lead status; lead-to-customer conversion.

10–13 Quotations

Estimates; PDF sharing; quotation status; quotation-to-project or invoice workflow.

14–20 Billing and collection

Invoices; invoice status; PDF sharing; GST support; payments; partial payments; pending reports.

21–25 Customer relationships

Customer Timeline; customer search and profiles; reminders; Today Follow-ups; reminder statuses.

26–30 Intelligence and productivity

Smart Insights; dashboard; search and filters; WhatsApp/email sharing; mobile-first management.

Additional verified app screens

Attendance with location, roles/permissions, project/user insights and Campaign Performance Intelligence entry point.

ACUMEN APP

JUDGE THINGS QUICKLY AND CLEARLY

STOP GUESSING.

START SEEING CLEARLY.

Bring leads, projects, people, quotations, invoices, payments and actionable Smart Insights into one mobile workflow.

EXPLORE ACUMEN APP

15-day free trial • Request a product demonstration

For full details, features and getting started:

www.acumensmartinsights.com

WhatsApp: +91 79909 95841

Email: contact@indianpacific.in

Developed by Rivaan Indian Pacific Private Limited

Product illustrations and example scenarios are explanatory. Feature availability, usage limits and subscription terms may vary by plan and release.