

Sales System

Complete guide to institutional subscriptions, licensing, seat management, sales pipeline, and renewals

Version 1.1 | Updated 2026-04-11 | Sales Teams, Customer Success, Operations, QA, Admin Users

1. Simple Feature Overview

The Sales & Institutional Subscription System helps your team manage the full lifecycle of institutional (B2B) sales — from initial contact with a prospective institution, through pipeline tracking and negotiation, all the way to closing a deal, onboarding users, and managing renewals.

Here is what the system lets you do:

- **Create and manage institutions** — universities, libraries, schools, corporates, nonprofits — each with their own subscription plan, seats, billing details, and contact information
- **Track sales opportunities** — use a visual Kanban pipeline to move deals through stages (New → Contacted → Negotiating → Converted or Declined)
- **Log sales activities** — record calls, emails, meetings, and notes against each opportunity so your team has a complete history
- **Send outreach emails** — use built-in email templates or write custom emails directly from the pipeline, with attachment support
- **Convert opportunities to institutions** — when a deal closes, convert the inquiry into a fully set-up institution with one click
- **Manage institutional users** — add users (readers) to an institution, send login invitations, and track activation
- **Handle renewals** — renew expiring subscriptions, with automated reminder emails sent at 30, 14, and 7 days before expiry
- **View sales reports** — see pipeline value, conversion rates, deal sizes, and expiring subscriptions at a glance

Implementation Status: All sales features listed above are **fully implemented and working**. The Sales Management Module is 100% complete as of March 2026.

2. Who Should Use This Feature

Role	What You'll Use
Sales Team	Create opportunities, track pipeline, send outreach emails, log activities, convert deals to institutions
Customer Success	Manage institutional users, send invitations, handle renewals, monitor activation rates
Operations / Admin	Create institutions directly, manage seats and billing, handle user onboarding, review reports
QA	Validate workflows end-to-end, verify email delivery, test invitation flows, check permission enforcement
Super Admin	All of the above, plus manage roles/permissions for sales staff

3. Before You Begin

Prerequisites You Must Have in Place

Before using the sales system, the following must be configured by your admin team:

Prerequisite	Where to Check	Why It Matters
Admin account with sales permissions	Settings → Admin Users → your account → Role	You need <code>institutions:read/create/update/delete</code> , <code>institutions:manage_users</code> , and <code>institution_inquiries:read/update</code> permissions
At least one subscription plan	Subscriptions → Plans	When creating an institution or converting an opportunity, you must select a subscription plan. At least one plan must exist.
SMTP / email configured	Settings → Integrations → SMTP Status	Invitation emails, renewal reminders, and outreach emails all require a working email configuration (SendGrid or SMTP).
Email templates seeded	Settings → Email Templates	The system uses templates like <code>institutional_login</code> , <code>institutional_welcome</code> , <code>institutional_renewal_confirmation</code> , and <code>institutional_renewal_reminder</code> . These are auto-seeded on first use, but verify they exist.
Cron jobs running	Deployment configuration	Automated renewal reminders (<code>/api/cron/institutional-renewal-reminders</code>) and subscription expiration (<code>/api/cron/subscription-reminders</code>) need to be scheduled.

Permissions Required

The system uses role-based access control. Here are the permissions relevant to sales:

Permission	What It Allows
<code>institutions:read</code>	View the Institutions list and details
<code>institutions:create</code>	Create new institutions
<code>institutions:update</code>	Edit institutions, renew subscriptions
<code>institutions:delete</code>	Delete institutions
<code>institutions:manage_users</code>	Add/remove/invite institutional users
<code>institution_inquiries:read</code>	View the sales pipeline and opportunity details
<code>institution_inquiries:update</code>	Create/edit opportunities, log activities, send emails, convert to institutions

If you cannot see the **Sales** section in the left sidebar, ask your admin to assign you a role with these permissions.

4. Key Terms in Simple Language

Term	What It Means
Institution	An organization (university, library, school, corporate, nonprofit) that has a group subscription. Think of it as a "customer account."
Opportunity	A potential deal in your sales pipeline. It tracks a prospective or existing institution through the sales process. Also called an "inquiry" in some parts of the system.
Pipeline	The visual board (Kanban) showing all your opportunities organized by their current stage.
Pipeline Stage	Where a deal is in the sales process: New → Contacted → Negotiating → Converted or Declined . There is also a virtual Inactive column for deals with no activity for 30+ days.
Opportunity Type	The kind of deal: New Inquiry (brand new prospect), Renewal (existing institution renewing), Upsell (expanding an existing deal), or Win-back (re-engaging a lost customer).
Seats	The number of user accounts (readers) an institution is licensed for. For example, "50 seats" means up to 50 people from that institution can access the platform.
Invitation	A magic link email sent to institutional users that lets them log in without a password.
Activation	When an invited user clicks the link and sets up their account, their status changes from "Invited" to "Active."
Lead Source	How the prospective institution found you: Website Form, Referral, Cold Outreach, Conference/Event, Email Campaign, Social Media, Partner, or Other.
Expected Value	The estimated deal value in INR (stored in paise internally, displayed in rupees).
Probability	Your estimate of how likely the deal is to close, expressed as a percentage (0–100%).
Follow-up Date	The next date you plan to contact the prospect. Overdue follow-ups are highlighted with a warning icon.
Renewal	Extending an institution's subscription with a new end date (and optionally adding more seats).
Activity	Any interaction logged against an opportunity: calls, emails, meetings, notes, status changes.

5. Step-by-Step Setup Guide

The screenshot displays the 'Institutions' management interface. At the top, there are summary cards for 'Active Institutions' (18), 'Total Seats' (724), 'Seats Used' (5), and 'Expiring Soon' (0). Below these is a search bar and filters for 'All Status' and 'All Types'. The main table lists the following institutions:

Institution	Type	Status	Seats	Contract Value	Expires	Actions
Test University Library library@testuniversity.edu	University	active	3/50	₹49,999	13 Feb 2027	View →
Sriram Jayabharathi - Renewal sriram.jeyabharathi@openturf.in	Nonprofit	active	0/2	₹9,998	23 Jan 2027	View →
Delhi University sriram.jeyabharathi@openturf.in	University	active	0/5	-	22 Jan 2027	View →
Test University E2E test@university.edu	University	active	2/50	-	12 Jan 2027	View →
Test University E2E test@university.edu	University	active	0/50	-	12 Jan 2027	View →
Test University E2E test@university.edu	University	active	0/50	-	12 Jan 2027	View →
Test University E2E test@university.edu	University	active	0/50	-	12 Jan 2027	View →

The institutions page shows all institutional subscribers with status, seat allocation, and subscription details.

5.1 Institution Creation and Management

Creating a New Institution

Use this when you already have a confirmed deal and want to set up the institution immediately (skipping the pipeline).

1. In the left sidebar, click **Sales** → **Institutions**
2. Click the "Add Institution" button (top right)
3. Fill in the **Basic Details** section:
 - **Institution Name** — the official organization name (required)
 - **Institution Type** — select from the dropdown: University/College, Public Library, School (K-12), Corporate/Business, Nonprofit Organization, or Other (required)
 - **Contact Name** — primary point of contact at the institution (required)
 - **Contact Email** — their email address (required)
 - **Contact Phone** — phone number (optional)
 - **Address** — physical address (optional)
4. Expand the **Billing & Tax Details** section (click to expand):

- **GSTIN** — 15-character GST identification number (optional)
- **PAN Number** — 10-character PAN (optional)
- **Billing Address, Billing City, Billing State** (dropdown), **Billing Pincode** — fill if different from primary address

5. Fill in the **Subscription Details** section:

- **Seats** — how many user accounts this institution gets (required)
- **Subscription Plan** — select from available plans in the dropdown (required)
- **Start Date** — defaults to today (change if needed)
- **End Date** — defaults to one year from today (change if needed)
- **Total Amount** — contract value in INR (optional but recommended)
- **Currency** — defaults to INR
- **Notes** — any internal notes about this institution (optional)

6. Click "Save"

The institution is created with status **Active** and appears in the Institutions list.

[Viewing and Editing an Institution](#)

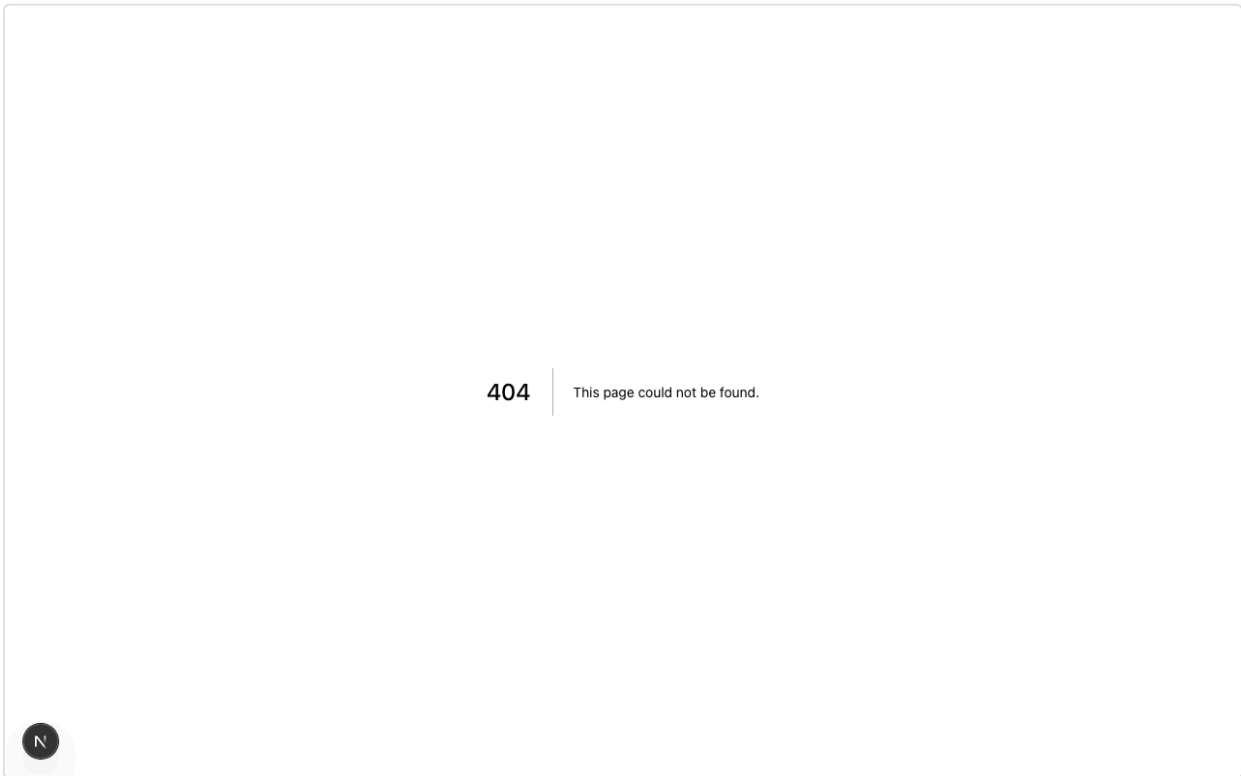
1. Go to **Sales** → **Institutions**
2. Use the **search bar** to find an institution by name, or use the **Status** and **Type** dropdown filters
3. Click the "**View**" button on any row (or click the row itself)
4. On the institution detail page, you can see:
 - **Overview** — all institution details, subscription dates, plan, seat usage, billing info
 - **Users** — table of all users added to this institution
 - **Linked Opportunities** — any renewal/upsell/winback opportunities created for this institution
5. To edit details, update the fields and save

[Understanding Institution Metrics](#)

At the top of the Institutions list page, you'll see four metric cards:

Card	What It Shows
Active Institutions	Number of institutions with status "Active"
Total Seats	Sum of all licensed seats across active institutions
Seats Used	How many of those seats are actually in use, with a utilization percentage
Expiring Soon	Number of active institutions whose subscription ends within 30 days

[5.2 Sales Pipeline and Opportunity Management](#)



Track institutional sales opportunities through pipeline stages with value, probability, and activity logging.

[Accessing the Pipeline](#)

1. In the left sidebar, click **Sales**
2. The main Sales page shows the pipeline with metrics and opportunities

[Understanding the Pipeline Layout](#)

At the top of the page, you'll see:

- **Header:** "Sales Pipeline" with subtitle "Manage institutional opportunities and deals"
- **Metric Cards:**
 - **Active Opportunities** — count of all non-converted/non-declined opportunities
 - **Pipeline Value** — total expected value across all active opportunities
 - **Avg Deal Size** — average expected value per opportunity
 - **Converted This Month** — number of deals closed this month

Below the metrics:

- **Search bar:** "Search opportunities..." — search by institution name, contact name, or email
- **Filters:** Opportunity Type dropdown (All Types, New Inquiry, Renewal, Upsell, Win-back)
- **View toggle:** Switch between **Kanban** and **List** views

[Using the Kanban View](#)

The Kanban board has six columns:

Column	Color	Meaning
New	Blue	Freshly created opportunities, not yet contacted
Contacted	Cyan	You've reached out to the prospect
Negotiating	Amber	Active discussions about pricing, terms, etc.
Inactive	Orange	Opportunities with no contact for 30+ days (virtual column — cannot drag into)
Converted	Green	Deal closed successfully
Declined	Gray	Prospect said no or deal fell through

Each column header shows:

- The stage name with a colored dot
- Number of opportunities in that stage
- Total pipeline value for that stage

Each opportunity card shows:

- Institution name (with building icon)
- Opportunity type badge (Inquiry, Renewal, Upsell, Win-back)
- Contact name (with user icon)
- Probability bar (color-coded: green for 75%+, blue for 50–74%, orange for 25–49%, red for below 25%)
- Expected value in INR (if set)
- Next follow-up date (with warning icon if overdue)
- Assigned team member (if assigned)

Pipeline Summary Bar (above the columns):

- **Total Pipeline** — sum of expected values
- **Weighted Value** — sum of (expected value × probability / 100) for all active deals
- **Active Opportunities** — count

Drag and Drop:

- Drag an opportunity card from one column to another to change its status
- You cannot drag into the **Inactive** column (it's automatically populated)
- The system updates the status immediately when you drop

[Using the List View](#)

Click the **List** button to switch to a table view. Columns include:

- Institution, Contact, Type, Status, Value, Created, Last Contact, Follow-up, Actions

[Creating a New Opportunity](#)

1. On the Sales Pipeline page, click "**New Opportunity**" (top right)
2. Fill in the **Basic Information** section:
 - **Institution Name** — the prospect's organization name (required)
 - **Organization Type** — select from dropdown (required)
 - **Contact Name** — person you're working with (required)
 - **Contact Email** — their email (required)
 - **Contact Phone** — their phone (optional)
3. Fill in the **Opportunity Details** section:
 - **Opportunity Type** — defaults to "New Inquiry"; change to Renewal, Upsell, or Win-back if applicable
 - **Lead Source** — how they found you: Website Form, Referral, Cold Outreach, Conference/Event, Email Campaign, Social Media, Partner, or Other (optional)
 - **Estimated Seats** — how many users the prospect might need (optional)
4. Fill in the **Sales Metrics** section:
 - **Expected Value** — estimated deal value in INR (optional)
 - **Probability** — your estimated close probability, defaults to 50% (0–100)
 - **Next Follow-up Date** — when you plan to contact them next (optional)
5. Add any **Notes** (optional)
6. Click "**Create Opportunity**"

The opportunity appears in the **New** column of the Kanban.

[5.3 Managing Users Within an Institution](#)

[Adding Users to an Institution](#)

1. Go to **Sales** → **Institutions** → click on the institution
2. In the **Users** section, click "**Add Users**"
3. Enter user details: **Email** and **Name** for each user
4. Click "**Add**"

What happens behind the scenes:

- The system creates a Reader account for each email (if one doesn't already exist) — these accounts are passwordless initially
- The user is linked to the institution with status **Active**
- The institution's seat count is checked — you cannot add more users than the licensed seats

Important: Adding users does NOT automatically send them login emails. You need to send invitations separately (see next section).

[Viewing User Status](#)

The Users table on the institution detail page shows:

Column	What It Shows
User	Email address and name
Status	Badge: Invited (yellow), Active (green), Deactivated (gray)
Invitation Sent	Date when the last invitation email was sent
Invitation Expires	Date when the invitation link expires (7 days from send)
Activated	Date when the user clicked the link and activated their account
Linked Reader	Whether the user has a connected Reader account

[Changing User Status](#)

- Click the **status toggle** button next to a user to change them between Active and Deactivated
- **Deactivating a user** immediately revokes their active sessions (they get logged out)
- Click the **Remove** button to completely remove a user from the institution (does not delete their Reader account)

[5.4 Sending Invitations to Institutional Users](#)

Invitations send magic link login emails to users so they can access the platform without a password.

[Sending Invitations \(Bulk or Selective\)](#)

1. Go to **Sales** → **Institutions** → click on the institution
2. **Option A: Send to all active users** — click the "Send Invitations" button in the Quick Actions area
3. **Option B: Send to specific users** — check the boxes next to the users you want to invite, then click "Send Invitations" in the bulk actions bar

What happens:

- Each selected user receives an email with a magic login link

- The link is unique per user and valid for a single use
- The **Invitation Sent** column updates with today's date
- The system prevents re-sending to the same user within 24 hours

Requirements:

- The institution must have **Active** status
- The subscription must not be expired
- Users must have **Active** status and a linked Reader account

[What the User Experiences](#)

1. The user receives an email with a link to log in
2. They click the link, which takes them to the Reader Portal
3. If they're a new user, they set a password; if existing, they're logged in directly
4. Their status changes from **Invited** to **Active** once they activate
5. They receive a confirmation email (`institutional_activation_success` template)

[5.5 Renewal Management](#)

[How Automatic Renewal Reminders Work](#)

The system automatically sends reminder emails to the institution's **contact person** (not the users) at three intervals before the subscription expires:

Reminder	When Sent	Template
30-day reminder	30 days before end date	<code>institutional_renewal_reminder</code>
14-day reminder	14 days before end date	<code>institutional_renewal_reminder</code>
7-day reminder	7 days before end date	<code>institutional_renewal_reminder</code>

These are handled by the cron job `/api/cron/institutional-renewal-reminders`. The system prevents duplicate reminders within a 6-day window.

[Manually Renewing an Institution](#)

1. Go to **Sales** → **Institutions** → click on the institution
2. Click the **"Renew"** button in the Quick Actions area
3. The **Renew Subscription** modal appears:
 - **New End Date** — select the new subscription end date (must be after the current end date)
 - **Additional Seats** — enter a number if the institution is adding more seats (optional)

- **Notes** — any notes about this renewal (optional)

4. Click "Renew"

What happens:

- The institution's end date is updated
- If additional seats were specified, the total seat count increases
- The institution's status is set to **Active** (useful if it had expired)
- A **Renewal History** record is created (tracking previous dates, seats, and who renewed)
- A confirmation email is sent to the institution's contact person (`institutional_renewal_confirmation` template)

[Viewing Renewal History](#)

The renewal history is tracked in the system with full details:

- Previous end date and seat count
- New end date and seat count
- Total amount (if entered)
- Who performed the renewal and when

[5.6 Converting an Opportunity to an Institution](#)

When a deal closes and you want to set up the institution:

1. Go to the opportunity detail page (click on any opportunity in the pipeline)
2. Click the "Convert to Institution" button in the Quick Actions bar
3. The **Convert Inquiry to Institution** modal appears:
 - **Seats** — number of user accounts (required)
 - **Subscription Plan** — select from the dropdown (required)
 - **Start Date** — subscription start date
 - **End Date** — subscription end date
 - **Total Amount** — contract value in INR (optional)
 - **Notes** — any notes (optional)
 - Expand **Billing & Tax Details** if needed: GSTIN, PAN, Billing Address, City, State, Pincode
4. Click "Convert"

What happens:

- A new **Institution** record is created with the contact info from the opportunity
 - The opportunity's status changes to **Converted**
 - A "Converted" activity is logged in the opportunity's timeline
 - The institution appears in **Sales → Institutions**
 - If you checked the send welcome email option, the contact person receives an email (`institutional_welcome` template)
-

[5.7 Logging Activities and Sending Emails from the Pipeline](#)

[Logging an Activity](#)

1. Go to the opportunity detail page
2. Click the "**Log Activity**" button (or the dropdown arrow next to it)
3. Choose the activity type:
 - **Log Call** — record a phone conversation
 - **Log Email** — record an email you sent outside the system
 - **Log Meeting** — record a meeting (in-person or virtual)
 - **Add Note** — add an internal note
4. Fill in the modal:
 - **Subject** — brief description of the interaction (optional)
 - **Notes** — details of what was discussed (optional)
 - **Next Follow-up Date** — set the next follow-up date (optional)
5. Click "**Log Activity**"

The activity appears in the **Activity Timeline** on the opportunity page with a timestamp, the activity type icon, and who logged it.

[Sending an Email from the Pipeline](#)

1. Go to the opportunity detail page
2. Click the "**Send Email**" button
3. Choose your email mode:
 - **Select Template** — pick from 16+ pre-built templates organized by category:
 - **Initial Outreach:** Initial Follow-up, Demo Invitation, Information Request
 - **Sales Process:** Pricing Proposal, Proposal Sent, Contract Sent, Negotiation Follow-up, Meeting Confirmation

- **Follow-ups:** General Follow-up
 - **Renewal:** Renewal Reminder, Renewal Confirmation
 - **Upsell:** Upsell Opportunity
 - **Win-back:** Win-back Outreach
 - **Post-Conversion:** Welcome/Onboarding, Thank You
 - **Custom Email** — write your own subject and body
4. Optionally set a **Next Follow-up Date**
 5. Optionally attach files using **Attachments** (file upload)
 6. Click "**Send Email**"

What happens:

- The email is sent to the opportunity's contact email
- A copy is CC'd to you (the sender)
- An "Email Sent" activity is logged in the timeline
- If the opportunity was in "New" status, it automatically moves to "Contacted"
- The `lastContactedAt` field is updated

[Editing Contact Information](#)

1. On the opportunity detail page, find the **Contact Information** panel
2. Click into the **Contact Name**, **Contact Email**, or **Contact Phone** fields to edit them
3. Click "**Save**" to save changes

[Updating Sales Metrics](#)

On the opportunity detail page, you can update:

- **Status** — change using the dropdown (New, Contacted, Negotiating, Converted, Declined)
- **Expected Value** — update the deal value
- **Probability** — slide between 0% and 100%
- **Next Follow-up Date** — set or change the next follow-up
- **Notes** — add or edit notes

Changes save automatically or on clicking Save.

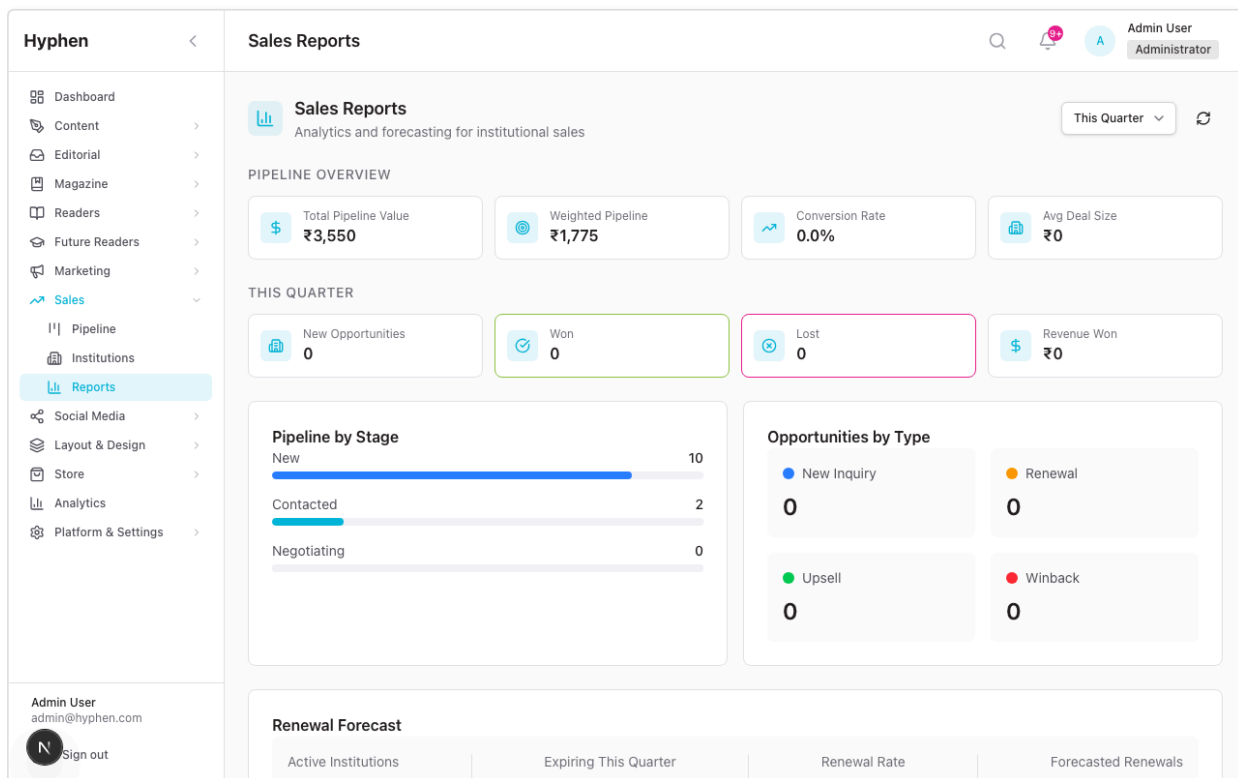
5.8 Creating Opportunities from Existing Institutions

You can create renewal, upsell, or win-back opportunities directly from an existing institution:

1. Go to **Sales** → **Institutions** → click on the institution
2. Click the "Create Opportunity" button
3. Select from the dropdown:
 - **Create Renewal Opportunity** — for subscription renewals
 - **Create Upsell Opportunity** — for expanding the deal (more seats, higher plan)
 - **Create Win-back Opportunity** — for re-engaging a cancelled or expired institution
4. Fill in any additional details (expected value, notes, follow-up date)
5. The opportunity is created and linked to this institution

The linked opportunity appears in the **Linked Opportunities** section on the institution detail page.

5.9 Sales Reports and Analytics



View institutional subscription revenue, renewal rates, and pipeline analytics.

1. Go to **Sales** → click the "Reports" button (or navigate to Sales → Reports)
2. The reports page shows:

Metric	Description
Total Pipeline Value	Sum of expected values for all active opportunities
Weighted Pipeline Value	Sum of (expected value × probability) — a more realistic projection
Conversion Rate	Percentage of closed deals that were won (converted / (converted + declined))
Converted Revenue	Total value of converted deals
Average Deal Size	Converted revenue / number of converted deals
Active Institutions	Number of institutions currently active
Expiring This Quarter	Institutions with subscriptions ending this quarter

3. Use the **Date Range** filter (Month, Quarter, Year) to adjust the view
 4. Review the **Metrics by Stage** breakdown (New, Contacted, Negotiating counts)
 5. Review the **Metrics by Opportunity Type** breakdown (New Inquiry, Renewal, Upsell, Win-back counts)
-

6. How to Verify It Worked

After Creating an Institution

Check	Where to Look	Expected Result
Institution appears in list	Sales → Institutions	New row with correct name, type, status "Active"
Seat count is correct	Institution detail page → Overview	Shows "0/N" used (where N is seat count)
Plan is assigned	Institution detail page → Overview	Plan name displayed
Dates are correct	Institution detail page → Overview	Start and end dates match what you entered

After Creating an Opportunity

Check	Where to Look	Expected Result
Appears in Kanban	Sales → Pipeline (Kanban view)	Card in the "New" column
Appears in List	Sales → Pipeline (List view)	Row with correct details
Metrics updated	Sales → Pipeline → metric cards	"Active Opportunities" count increased
Activity logged	Opportunity detail → Activity Timeline	"Created" activity entry

After Sending Invitations

Check	Where to Look	Expected Result
Invitation status updated	Institution detail → Users table	"Invitation Sent" date populated
Email received	Check the user's email inbox	Magic link email from the platform
User can log in	Reader Portal	Click magic link → user can access content
Status changes	Institution detail → Users table	Status changes from "Invited" to "Active" after activation
Active users count	Institution detail → metric cards	"Active Users" count increases

After Renewing an Institution

Check	Where to Look	Expected Result
End date extended	Institution detail → Overview	New end date displayed
Status is Active	Institution detail → Overview	Status badge shows "Active"
Seat count updated	Institution detail → Overview	Reflects any additional seats
Confirmation email	Check the contact person's email	Renewal confirmation email received
Renewal history	System records	Renewal tracked with previous/new dates and who renewed

[After Converting an Opportunity](#)

Check	Where to Look	Expected Result
Opportunity status	Sales → Pipeline	Card moved to "Converted" column
Institution created	Sales → Institutions	New institution in the list
Activity logged	Opportunity detail → Activity Timeline	"Converted" activity entry
Contact info carried over	Institution detail → Overview	Contact name, email, phone match the opportunity

[7. Worked Examples \(End-to-End Scenarios\)](#)

[Example 1: Creating a New Institution and Preparing It for Subscription Onboarding](#)

Scenario: Delhi University has signed a contract for 200 seats on the Annual plan, starting April 1, 2026.

Steps:

1. Go to **Sales** → **Institutions**
2. Click **"Add Institution"**
3. Fill in:
 - Institution Name:
 - Institution Type:
 - Contact Name:
 - Contact Email:
 - Contact Phone:
 - Address:
4. Expand **Billing & Tax Details**:
 - GSTIN:
 - PAN Number:
 - Billing Address:
 - Billing City:
 - Billing State:
 - Billing Pincode:
5. Fill in **Subscription Details**:
 - Seats:
 - Subscription Plan: select (or your institutional plan)
 - Start Date:
 - End Date:
 - Total Amount:
 - Notes:
6. Click **"Save"**

Verification:

- Go to Sales → Institutions — "Delhi University" appears with status "Active", 200 seats, 0 used
- Metric cards update: "Active Institutions" and "Total Seats" increase

Next Steps:

- Add users to the institution (Section 5.3)
- Send invitations so users can log in (Section 5.4)

[Example 2: Creating and Tracking a New Sales Opportunity in the Pipeline](#)

Scenario: You met a representative from Mumbai Public Library at a conference. They expressed interest in a 50-seat subscription.

Steps:

1. Go to **Sales** → click "**New Opportunity**"
2. Fill in Basic Information:
 - Institution Name:
 - Organization Type:
 - Contact Name:
 - Contact Email:
 - Contact Phone:
3. Fill in Opportunity Details:
 - Opportunity Type:
 - Lead Source:
 - Estimated Seats:
4. Fill in Sales Metrics:
 - Expected Value:
 - Probability:
 - Next Follow-up Date:
5. Notes:
6. Click "**Create Opportunity**"

Tracking over time:

Day 2 — Send initial email:

1. Open the opportunity from the Kanban (click the card in the "New" column)
2. Click "Send Email" → Select Template → "Initial Follow-up"
3. Set Next Follow-up Date to 2026-03-25
4. Click "Send Email"
5. Status automatically changes to "Contacted"

Day 7 — Log a call:

1. Click "Log Activity" → "Log Call"
2. Subject: Discussed pricing and seat options
3. Notes: Rajesh is checking budget approval. Expects answer by month-end.
4. Next Follow-up Date: 2026-04-01
5. Click "Log Activity"

Day 12 — Update probability:

1. On the opportunity detail page, change Probability from 30 to 60
2. Change status to "Negotiating" (or drag the card to the Negotiating column)

Day 20 — Deal closes:

1. Click "Convert to Institution"
2. Fill in: Seats: 50, Plan: Annual, Start Date: 2026-04-15, End Date: 2027-04-14
3. Click "Convert"
4. The opportunity moves to "Converted" and a new institution is created

Verification:

- Pipeline → Kanban: card is in "Converted" column
- Sales → Institutions: "Mumbai Public Library" is in the list with 50 seats
- Activity Timeline shows: Created → Email Sent → Call Logged → Status Changed → Converted

[Example 3: Sending Invitations to Institutional Users and Verifying Activation](#)

Scenario: Delhi University (from Example 1) has provided a list of 10 initial users to onboard.

Steps:

1. Go to **Sales** → **Institutions** → click **Delhi University**
2. Click **"Add Users"**
3. Enter the 10 users' email addresses and names:
 - `student1@du.ac.in` — Anika Gupta
 - `student2@du.ac.in` — Vikram Patel
 - ... (repeat for all 10)
4. Click **"Add"**
5. The Users table now shows 10 users, all with status "Active" and no invitation sent

Sending Invitations:

6. Click the **"Send Invitations"** button in Quick Actions
7. The system sends magic link emails to all 10 users
8. The "Invitation Sent" column updates with today's date for each user

Verifying Activation:

9. Ask one of the users (e.g., Anika) to check her email and click the login link
10. She is taken to the Reader Portal, sets a password, and gains access
11. Go back to the institution detail page and click **"Refresh"**
12. Anika's row now shows:
 - Status: **Active** (green badge)
 - Activated: today's date
 - Linked Reader: yes
13. The "Active Users" metric card increases from 0 to 1
14. The "Seats Used" on the Institutions list page updates

Verification:

- Institution detail → Users table: one or more users show "Active" status
 - Institution detail → metric cards: "Active Users" matches the number who activated
 - Institutions list → Seats column: shows "1/200" (or however many activated)
 - The activated user can access subscriber-only content on the Reader Portal
-

Example 4: Handling an Institutional Renewal and Checking Reminder Behavior

Scenario: Bangalore International School's subscription expires on April 15, 2026. They want to renew for another year with 20 additional seats.

Automatic Reminders (no action needed from you):

- **March 16** (30 days before): The cron job sends a renewal reminder email to the contact person
- **April 1** (14 days before): Second reminder email sent
- **April 8** (7 days before): Third reminder email sent

You can verify reminders were sent by checking:

- The contact person's email inbox
- The institution's renewal history (the system logs REMINDER_SENT entries)

Processing the Renewal:

1. Go to **Sales** → **Institutions** → click **Bangalore International School**
2. Note the alert: "Subscription expiring within 30 days" (if within 30 days)
3. Click the "**Renew**" button
4. In the modal:
 - New End Date: 2027-04-15
 - Additional Seats: 20
 - Notes: Renewed for AY 2026-27. Added 20 seats for new batch.
5. Click "**Renew**"

Verification:

- Institution detail → Overview:
 - End Date now shows 2027-04-15
 - Seats increased (e.g., from 100 to 120)
 - Status: "Active"
 - Contact person receives a renewal confirmation email
 - The "Expiring Soon" metric card on the Institutions list decreases
 - All existing users continue to have access without interruption
-

Example 5: Following Up on an Institution Inquiry and Verifying Downstream Impact

Scenario: A nonprofit organization, Literacy Foundation, submitted an inquiry through the website. You need to nurture this lead and close the deal.

Step 1: Inquiry is in the pipeline

1. Go to **Sales** → Pipeline
2. Find "Literacy Foundation" in the **New** column
3. Click the card to open the detail page
4. Review the inquiry details: contact info, estimated seats, message

Step 2: Initial outreach

5. Click "**Send Email**" → Select Template → "**Information Request**"
6. The template auto-fills with the contact's name and institution name
7. Set Next Follow-up Date: 5 days from now
8. Click "**Send Email**"
9. Status moves to **Contacted**

Step 3: Follow-up call

10. When the follow-up date arrives, you'll see a warning icon on the opportunity
11. Call the contact and log the activity:
 - Click "**Log Activity**" → "**Log Call**"
 - Subject: Discussed pricing for 25 seats
 - Notes: Interested in digital-only annual plan. Needs board approval. Will confirm by end of month.
 - Next Follow-up Date: 2 weeks from now
12. Update Probability to 55%
13. Drag the card to **Negotiating** (or change status in the dropdown)

Step 4: Close the deal

14. After board approval, click "**Convert to Institution**"
15. Fill in:
 - Seats: 25
 - Subscription Plan: Annual
 - Start Date: 2026-05-01
 - End Date: 2027-04-30

- Total Amount: ₹75,000

16. Check "Send Welcome Email" if available

17. Click "Convert"

Step 5: Onboard users

18. Go to Sales → Institutions → Literacy Foundation

19. Add users, send invitations (per Sections 5.3 and 5.4)

Verification of downstream impact:

What to Check	Where	Expected Result
Opportunity closed	Sales → Pipeline	Card in "Converted" column with green badge
Institution created	Sales → Institutions	"Literacy Foundation" with 25 seats, Active status
Welcome email received	Contact person's inbox	<code>institutional_welcome</code> email with dates and details
Users can activate	Reader Portal	Invited users can click magic link and access content
Subscriber content access	Reader Portal	Activated institutional users can read subscriber-only articles
Reports updated	Sales → Reports	Converted Revenue and Active Institutions increase
Renewal reminders scheduled	Automatic	30/14/7-day reminders will fire before April 30, 2027

8. Common Mistakes and How to Fix Them

"I can't see the Sales section in the sidebar"

Cause: Your admin role doesn't have `institutions:read` or `institution_inquiries:read` permissions. **Fix:** Ask your Super Admin to go to Settings → Admin Users → your account, and assign a role that includes sales permissions.

"I can't add more users to the institution"

Cause: You've reached the seat limit. **Fix:** Either:

- Renew the subscription with additional seats (Section 5.5)
- Remove inactive/deactivated users to free up seats
- Edit the institution to increase the seat count (if you have `institutions:update` permission)

"Invitation emails are not being sent"

Cause: Could be one of several issues:

1. **SMTP not configured:** Check Settings → Integrations → SMTP Status. If it shows "Not configured," contact your system admin.
2. **Institution is not Active:** Invitations can only be sent for active institutions with valid subscriptions.
3. **User was already invited within 24 hours:** The system prevents re-sending within 24 hours to avoid spam. Wait and try again.
4. **User doesn't have a linked Reader account:** Users must have Active status with a Reader account to receive invitations.

"I can't convert an opportunity to an institution"

Cause: Possible reasons:

1. **Missing permissions:** You need both `institution_inquiries:update` AND `institutions:create` permissions.
2. **Opportunity already converted:** An opportunity can only be converted once. Check if the status is already "Converted."
3. **No subscription plans available:** At least one subscription plan must exist. Check Subscriptions → Plans.

"Drag and drop is not working on the Kanban"

Cause: You cannot drag into the Inactive column (it's read-only/virtual). You also cannot change the status of a Converted opportunity. **Fix:** Drag between the other columns (New, Contacted, Negotiating, Declined). For converted deals, the status is final.

"Renewal reminders are not being sent automatically"

Cause: The cron job `/api/cron/institutional-renewal-reminders` may not be scheduled. **Fix:** Contact your DevOps team to verify the cron job is configured and running. It should run daily.

"I deleted an opportunity by mistake"

Cause: Only Declined opportunities can be deleted. If it was declined and deleted, it cannot be recovered. **Fix:** Create a new opportunity. For active opportunities, the delete button is disabled — only Declined status allows deletion.

"The overdue follow-up alert won't go away"

Cause: You have opportunities where the Next Follow-up Date is in the past. **Fix:** Open each overdue opportunity, update the follow-up date to a future date, or log an activity to update the last contact date.

"Expected value shows ₹0 or looks wrong"

Cause: The system stores amounts in paise (1/100 of a rupee) internally. **Fix:** Enter amounts in rupees in the UI — the system handles the conversion. If you see unexpected values, check whether the amount was entered in rupees or paise.

9. QA / Testing Checklist

Institution Management

- Create a new institution with all required fields → verify it appears in the list with "Active" status
- Create an institution with billing/tax details → verify GSTIN, PAN, billing address are saved
- Try creating an institution without required fields → verify validation errors appear
- Edit an institution's details → verify changes are saved
- Try reducing seats below the current active user count → verify the system prevents this
- Delete an institution → verify it is removed from the list
- Filter institutions by Status (Active, Pending, Expired, Cancelled) → verify correct results
- Filter institutions by Type (University, Library, School, etc.) → verify correct results
- Search for an institution by name → verify search works
- Verify the "Expiring Soon" metric card counts institutions expiring within 30 days

Sales Pipeline

- Create a new opportunity → verify it appears in the "New" column of the Kanban
- Drag an opportunity from "New" to "Contacted" → verify status updates
- Drag an opportunity to "Negotiating" → verify status updates
- Try dragging into the "Inactive" column → verify it is prevented
- Verify opportunities with 30+ days no contact appear in the "Inactive" column
- Update probability, expected value, and follow-up date → verify changes persist
- Verify the Pipeline Summary Bar shows correct Total Pipeline and Weighted Value
- Verify the "Active Opportunities" metric card shows the correct count
- Test all four opportunity types: New Inquiry, Renewal, Upsell, Win-back
- Test search functionality across institution name, contact name, and email
- Switch between Kanban and List views → verify data is consistent

Activities and Emails

- Log a Call activity → verify it appears in the Activity Timeline with correct icon
- Log an Email activity → verify it appears in the timeline
- Log a Meeting activity → verify it appears in the timeline
- Add a Note → verify it appears in the timeline
- Send a templated email → verify:

- Email is received by the contact
- "Email Sent" activity is logged in the timeline
- Status auto-moves from "New" to "Contacted" (if applicable)
- `LastContactedAt` is updated
- Send a custom email → verify same as above
- Send email with attachment → verify attachment is included

Conversion

- Convert an opportunity to an institution → verify:
 - Institution is created with correct contact info
 - Opportunity status changes to "Converted"
 - "Converted" activity appears in timeline
 - Converted institution appears in Sales → Institutions
- Try converting an already-converted opportunity → verify it is prevented

User Management and Invitations

- Add users to an institution → verify they appear in the Users table
- Try adding more users than available seats → verify the system prevents it
- Send invitations → verify emails are sent (check inbox)
- Click invitation magic link → verify user can activate and access content
- Verify user status changes from "Invited" to "Active" after activation
- Deactivate a user → verify their sessions are revoked
- Remove a user → verify they are removed from the institution (Reader account preserved)
- Try sending invitation again within 24 hours → verify it is prevented

Renewals

- Renew an institution → verify:
 - End date is updated
 - Seats are increased (if additional seats specified)
 - Status is "Active"
 - Renewal confirmation email is sent
 - Renewal history is recorded
- Try setting new end date before current end date → verify validation error

- Verify renewal reminders fire at 30, 14, and 7 days (check cron logs or test environment)

Permissions

- Log in as a user without sales permissions → verify Sales section is not visible
- Log in as a user with `institutions:read` only → verify they can view but not create/edit
- Log in as a user with full sales permissions → verify all actions are available
- Verify the "New Opportunity" and "Add Institution" buttons are hidden for users without create permissions

Reports

- Verify Sales Reports page loads with correct metrics
- Verify Pipeline Value matches the sum of expected values
- Verify Conversion Rate calculation is correct
- Change date range filter → verify metrics update

Cross-Module Integration

- Verify institutional users can access subscriber-only content on the Reader Portal
 - Verify deactivated users cannot access content
 - Verify expired institutions → users lose access
 - Check GDPR: anonymizing an institutional user removes their personal data but preserves institution record
-

10. Current Known Limitations

Limitation	Impact	Workaround
No bulk CSV import for users	You must add users one by one or in small batches via the UI	Use the API endpoint <code>POST /api/institutions/:id/users</code> with a list of users for bulk operations
Pipeline reports use partially mock historical data	Monthly trend charts may show sample data rather than real historical values	Focus on the real-time metrics (Total Pipeline, Conversion Rate, etc.) which are accurate
No payment collection within the pipeline	The pipeline tracks the deal but doesn't handle actual payment processing	Collect payment via Razorpay/Stripe outside the pipeline, then create or convert the institution
No automated opportunity creation from website forms	Inquiries from a public-facing form must be manually entered as opportunities	Create opportunities manually in the pipeline as you receive inquiries
Invitation magic links are single-use	If a user's link expires or fails, you need to resend from the institution page	Wait 24 hours if the system blocks resending, then send a new invitation
Renewal reminders only go to the contact person	Individual institutional users don't receive expiry warnings	Communicate renewal status to users through your own channels if needed
Cannot change institution type after creation	The institution type field (University, Library, etc.) is set at creation	Delete and recreate the institution if the type needs to change, or update via API
Delete is only allowed for Declined opportunities	Active opportunities cannot be deleted from the pipeline	Change the status to "Declined" first, then delete
No dashboard for sales team individual performance	Pipeline reports show aggregate metrics, not per-salesperson performance	Filter opportunities by assigned team member manually
Future Readers and Sales Institutions are separate models	If an institution is both a Sales customer and a Future Readers participant, they exist as separate records	Use the "Sync to Future Readers" action from the institution detail page to link them

This user manual covers the Sales & Institutional Subscription System as implemented in the Hyphen Admin Console as of March 2026. All features described are fully implemented and functional. For technical API documentation, see the API Specification documents in </docs/apis/>.

[< E-Commerce Store](#)

[Complete guide to the Shopify-integrated e-commerce ...](#)

[Future Readers Program >](#)

[Complete guide to managing student programs, enrollm...](#)