streakstone

GUIDE

How to use Streakstone, for every person on your team.

Owner, manager, counsellor, front desk, agency and agency client. What each one sees, and the few things each one does.

November 2026

Screens are from the Streakstone demo workspace with sample data.

START HERE

Streakstone in one page

Streakstone sits between your lead ads and your sales team. Every lead is tested before anyone calls it, and every outcome goes back to the ads so they find better people.

1 · Test

Six checks the second a lead arrives: real mobile number, not a duplicate, inside your service area, real text in the answers, not a Meta test lead, filled at human speed. A lead that fails is held, never deleted.

2 · Talk

WhatsApp within a minute, in the lead's language. If there is no reply in the wait you set, an AI call asks your questions inside your calling hours.

3 · Pass

The answers are scored against your rules. Hot and warm leads go to your CRM, a Google Sheet, a webhook or straight to a rep's WhatsApp.

4 · Teach

Each stage (valid, qualified, booked, showed, converted, with the sale value) goes back to Meta and Google, so the ads learn which people became buyers.

Where leads come from

Meta lead ads, people who message you from a Meta click-to-WhatsApp ad, Google Ads lead forms, your website forms, and property and college portals (99acres, MagicBricks, Housing.com, Shiksha). All get the same tests.

The logins

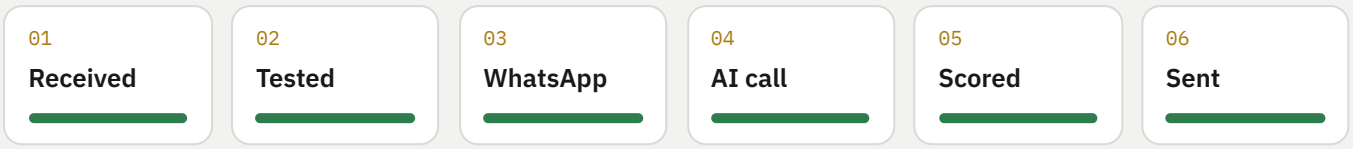
LEVEL	WHO	SEES	DEMO LOGIN
Owner	Business owner or clinic head	Everything, including billing	`neha@aarnaclinic.demo`
Manager	Runs sales or the front office	All leads, held queue, sales, rules, connections	`sameer@aarnaclinic.demo`
Counsellor	Reps, counsellors, site-visit staff	Their own assigned leads	`imran@aarnaclinic.demo`
Front desk	Reception (Assured plans)	Appointments and check-in only	`desk@aarnaclinic.demo`
Agency	Agency running ads for clients	All its client workspaces	`agency@growthlab.demo`
Agency client	A business the agency serves	Its own workspace only	`rohit@skylinehomes.demo`

> Every demo login uses the password `demo1234`. The demo runs on sample data and simulated providers, so you can click anything.

START HERE

A lead's journey, and the words on screen

Every lead row in Streakstone shows the same six stages as small bars. This is how to read them.



done working stopped not needed

Lead statuses

Hot	Scored at or above your hot score. Sent to your team straight away.
Warm	Scored between your warm and hot scores. Sent to your team.
Held	Failed a check, or the conversation said no. Waits in Held for review with the reason. Never deleted.
Released	A held lead a manager released to the team by hand.
Junk	A held lead a manager confirmed as junk. Meta is told it was not a real lead.

How the score works

Interested +40 (unsure +20). Wants to come this week +35, this month +20, later +5. Budget fits +20 (below your floor −15). Named a concern +5. "Not interested" or "wrong number" is held straight away. You set the hot and warm thresholds in Rules.

Stopping messages

Anyone who replies STOP is never messaged or called again by Streakstone. The lead stays in your list for your own team.

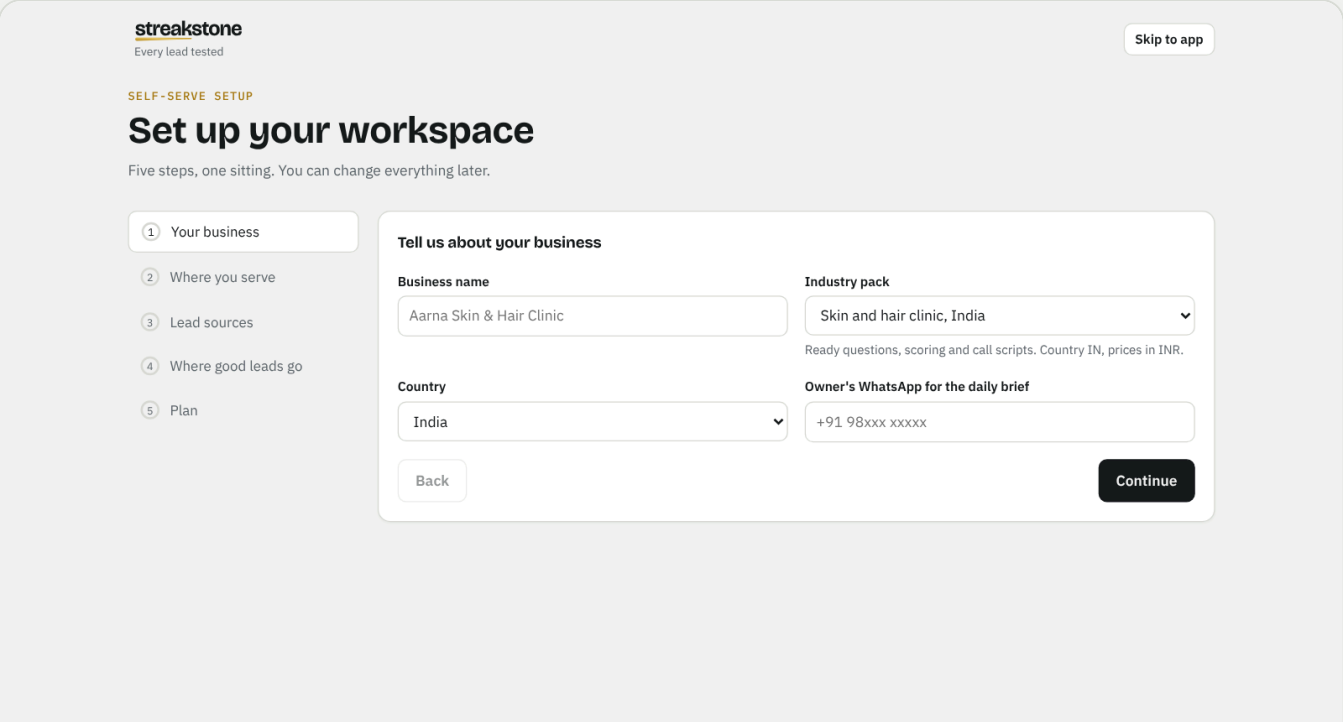
What the ad platforms receive

`valid` or `invalid` after the checks, `qualified` or `held` after the conversation, then `booked`, `showed` and `converted` with the sale value. Meta gets them through the Conversions API, Google Ads as offline conversions.

OWNER · 1 OF 6

Sign up and set up in one sitting

Start at the website with Start free trial. 14 days free, no card. The setup wizard has five steps and you can change everything later.



Step 1 of the setup wizard

1 **Your business.** Name, industry pack, country and the WhatsApp number that gets your daily brief. The pack fills in questions, scoring and call scripts.

2 **Where you serve.** Cities and pincode prefixes. Leads outside are held for your review. Clinics can switch on Assured here.

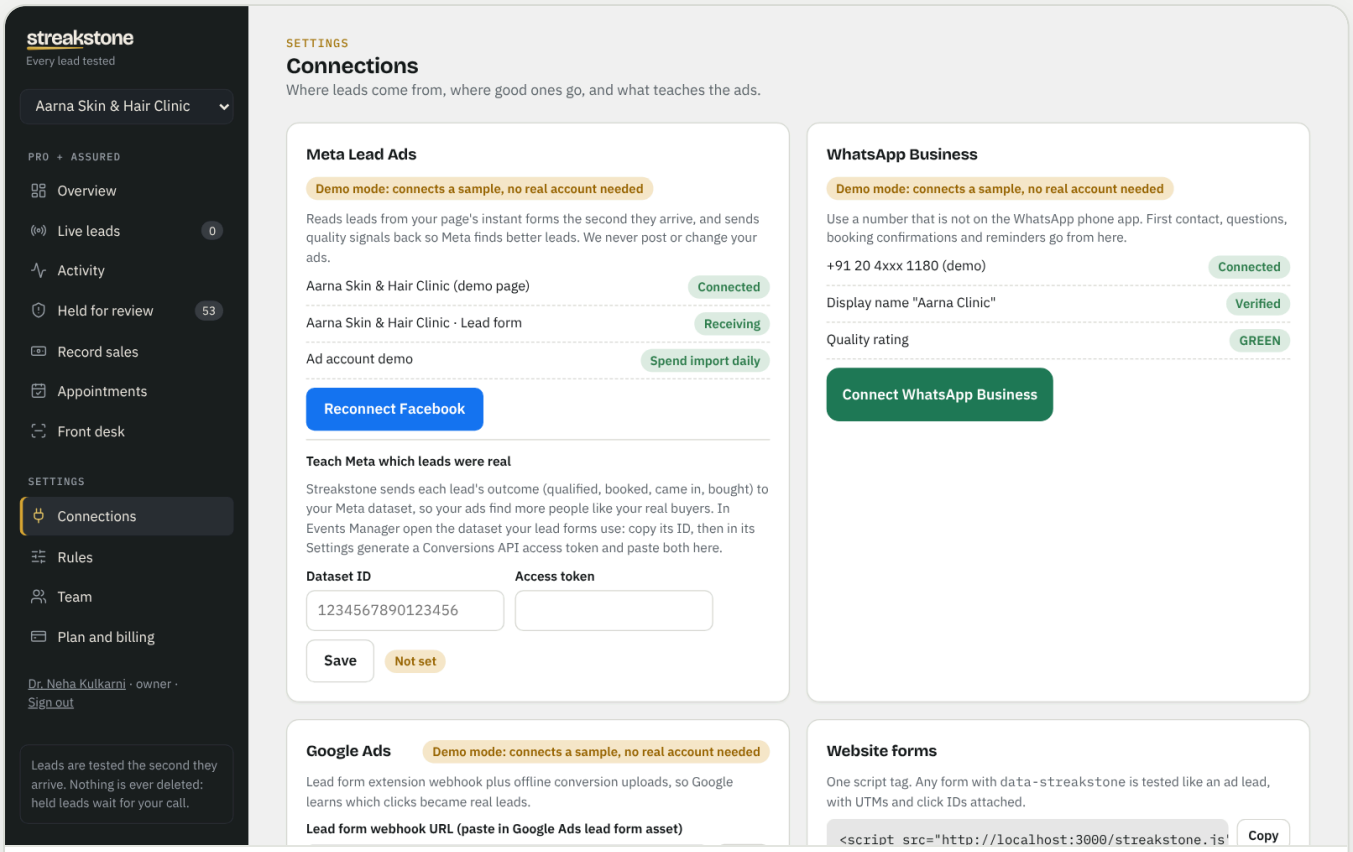
3 **Lead sources.** Meta lead ads, your WhatsApp Business number, Google Ads lead forms and website forms. Portals are added later under Connections.

4 **Where good leads go.** Google Sheet, LeadSquared, Zoho CRM, HubSpot, TeleCRM, reps on WhatsApp, a webhook, or nowhere yet.

5 **Plan.** Pick Starter, Pro or Agency. 14 days free on every plan.

Connections: where leads come from and where they go

Settings → Connections. Until a provider is connected, its card says so. In the demo every card runs in demo mode.



Settings → Connections

1 **Meta Lead Ads.** Connect your Facebook page. Leads are read the second they arrive and quality signals go back. Streakstone never posts or changes your ads.

2 **WhatsApp Business.** Use a number that is not on the WhatsApp phone app. First contact, questions, confirmations and reminders go from it. People who message it from a click-to-WhatsApp ad become leads too.

3 **Google Ads.** Paste the lead form webhook URL into your Google Ads lead form asset.

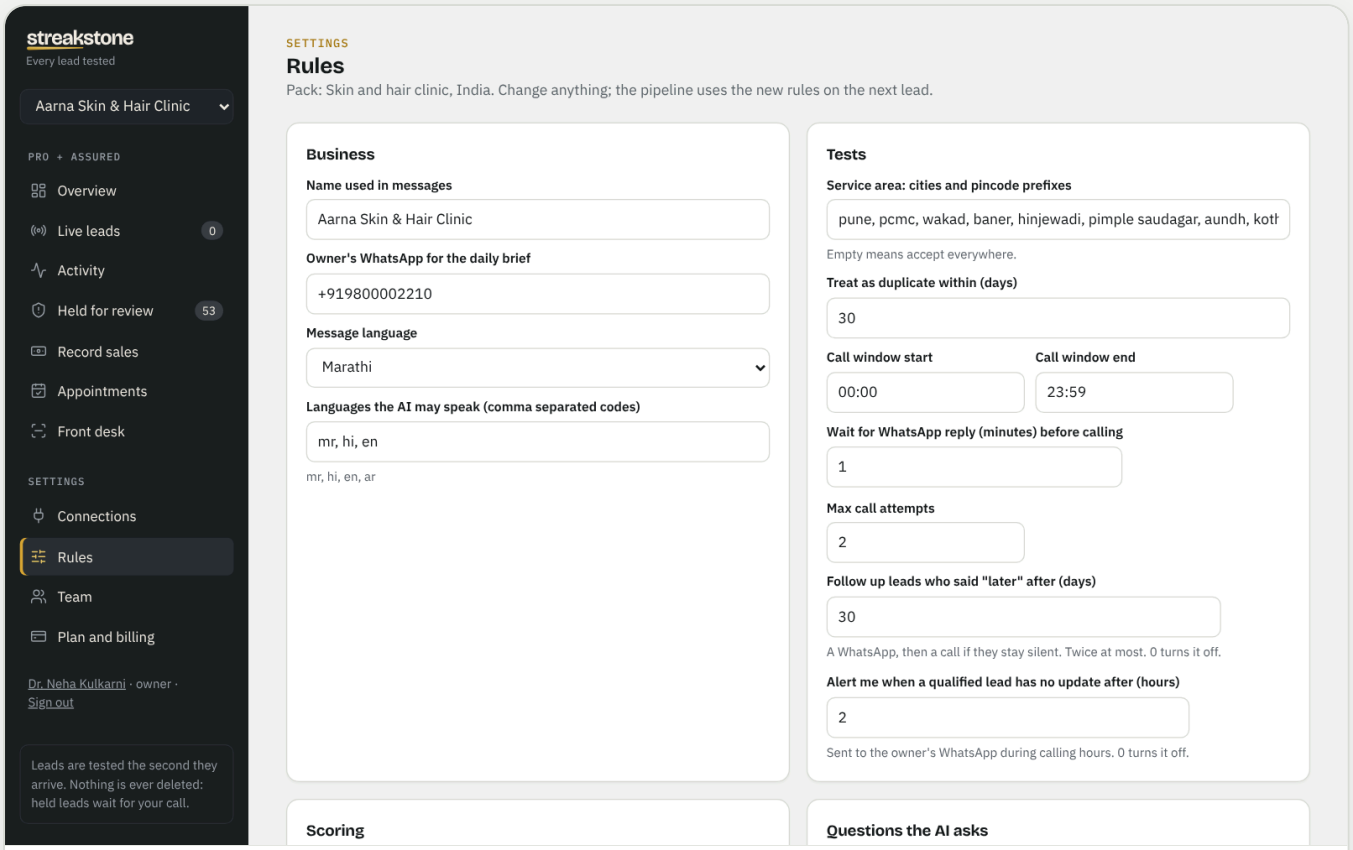
4 **Website forms.** One script tag. Any form marked `data-streakstone` is tested like an ad lead.

5 **Portals.** 99acres, MagicBricks, Housing.com and Shiksha push leads to your own address, or you forward their lead emails to it. Each portal shows separately on the Overview.

6 **Where good leads go.** Add one or more destinations. Each shows whether the last deliveries worked.

Rules: how strict, how fast, what to ask

Settings → Rules. Changes apply to the next lead.



Settings → Rules

Business

Name used in messages, the owner's WhatsApp for the daily brief, message language and the languages the AI may speak (Marathi, Hindi, English, Arabic).

Tests

Service area (empty means accept everywhere) and how many days count as a duplicate.

Calling and follow-up

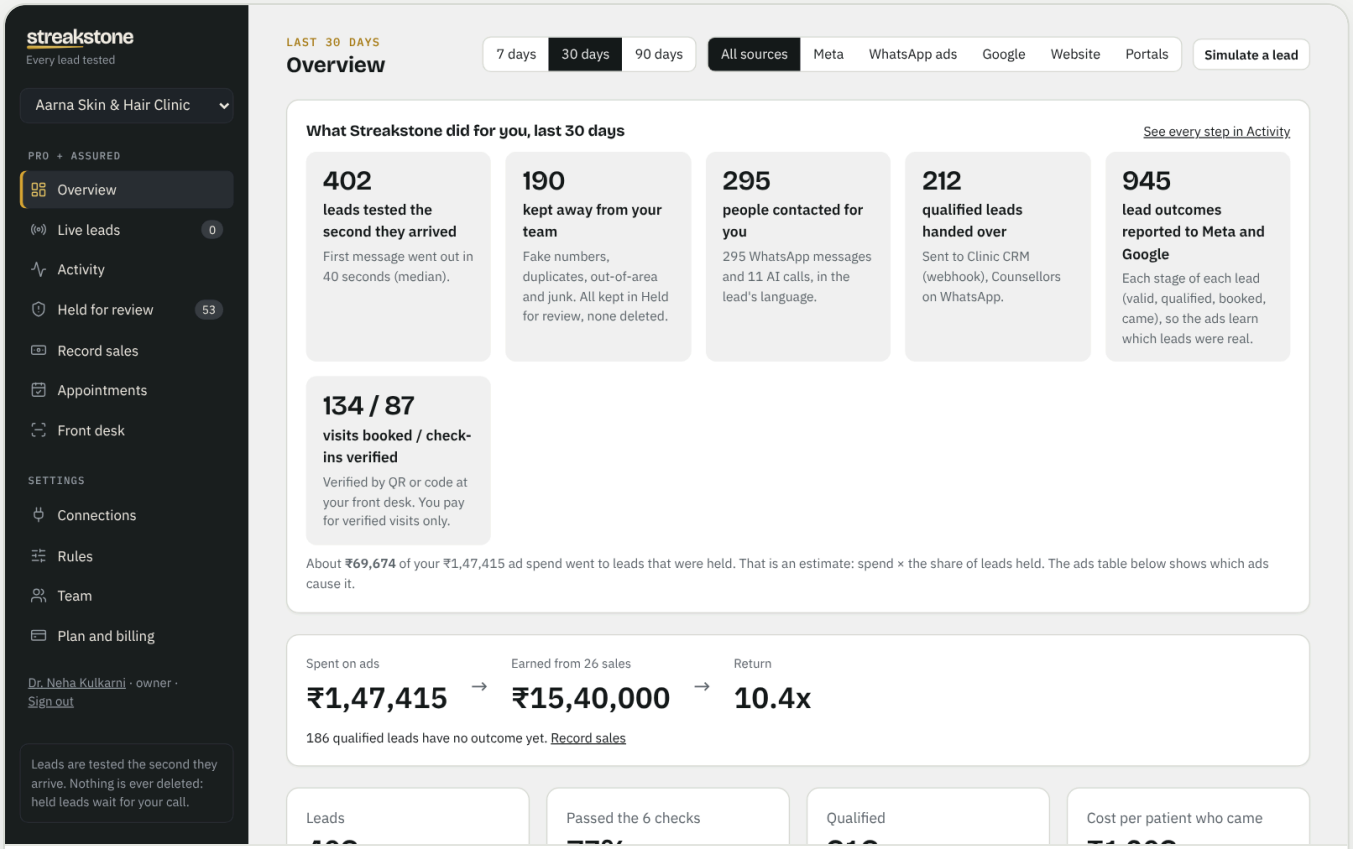
Call window, how many minutes to wait for a WhatsApp reply before calling, maximum call attempts, when to follow up people who said "later", and after how many hours to remind the team about a qualified lead with no update.

Scoring and questions

Hot and warm scores, an optional minimum budget, and the questions the AI asks, one per line, in order.

Overview: your morning read

Pick the period (7, 30 or 90 days) and the source (all, Meta, WhatsApp ads, Google, website, portals) at the top. Every number changes with them.



Overview for the owner

1 **What Streakstone did for you.** Leads tested, junk kept away, people contacted, qualified leads handed over, outcomes reported to the ads, and visits verified.

2 **Money in against money out.** Ad spend, what your recorded sales earned, and the return.

3 **Four cards and leads per day.** Leads, the share that passed the six checks, qualified leads, and cost per qualified lead or per patient who came. Gold is qualified, grey held, the line is ad spend.

4 **Why leads were held, where they came from, the funnel.** Plus areas that send leads you cannot serve.

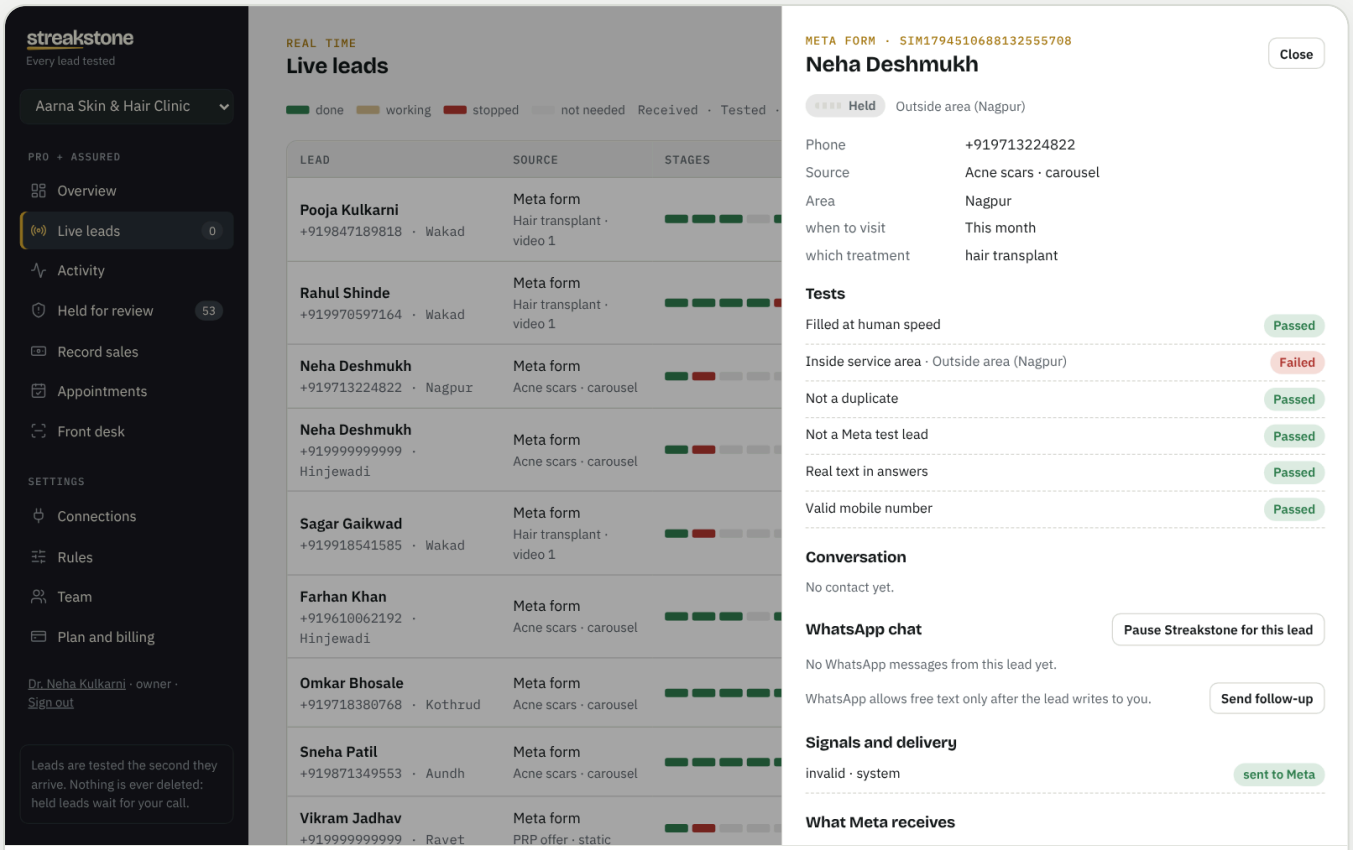
5 **Which ads bring real leads.** Each ad gets advice: scale up, keep, or pause when most of its leads were never real.

6 **How you compare.** Your numbers against at least five similar businesses, once there are enough of them.

> The same summary reaches the owner's WhatsApp each morning. On Mondays the ad advice arrives too, and each month a sales report.

Live leads and one lead in detail

Live leads updates by itself as leads arrive. Click any row to open the lead.



Live leads with one lead open

1 **Tests.** All six checks with passed or the reason it failed.

2 **Conversation.** The WhatsApp chat or the AI call transcript, with what the AI read from it.

3 **Signals and delivery.** Every stage, whether it was sent to Meta and Google, and where the lead was delivered.

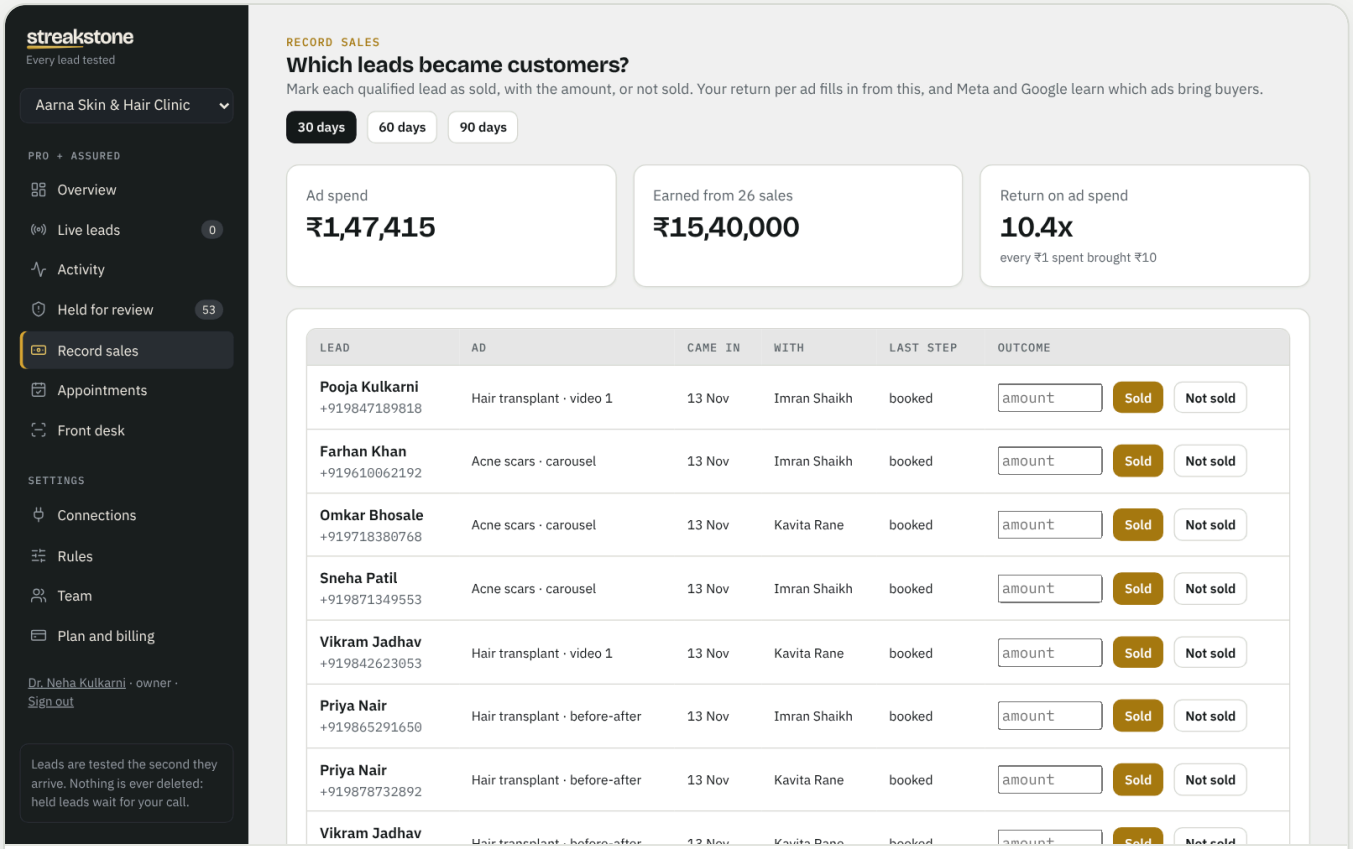
4 **Take over the chat.** Reply to the lead yourself from this page. Replying pauses Streakstone for that lead; press Let Streakstone continue to hand it back.

5 **Update (owner and manager).** Called, Booked, Converted with the sale value, or Not converted. Each one updates the stage and teaches the ads.

6 **Simulate a lead** on the Overview sends a sample lead through the whole pipeline so you can watch it.

Record sales: which leads became customers

Your return per ad comes from this page, and it is what teaches Meta and Google which ads bring buyers.



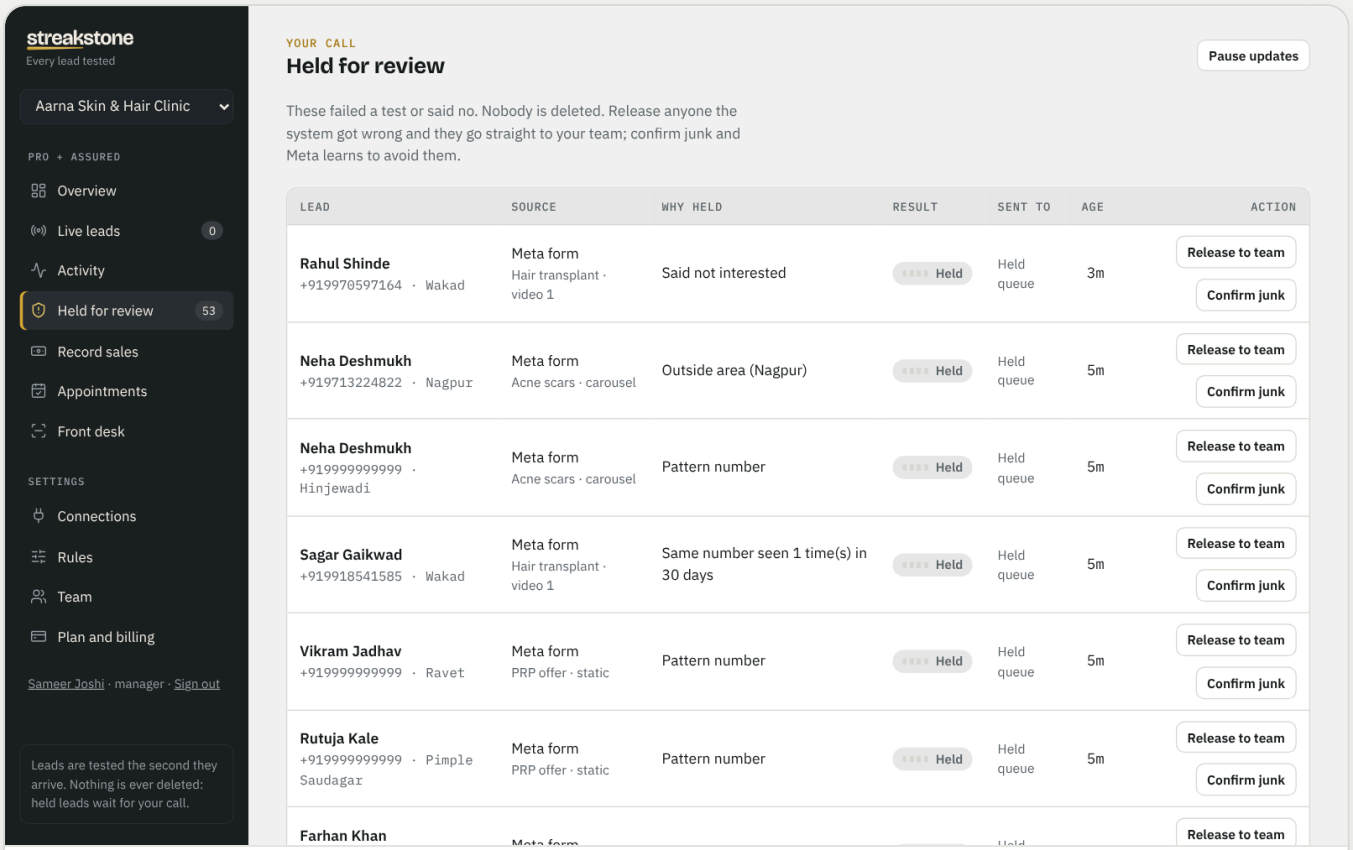
Record sales

1. Each qualified lead from the period is listed with the ad it came from, when it came in and who handled it.
2. Type the amount and press **Sold**, or press **Not sold**. Leads with an outcome leave the list.
3. Counsellors can do the same from WhatsApp by replying **4** with the amount, for example `4 25000`.
4. The Overview's return and the ads table update straight away.

MANAGER

Held for review, twice a day

Leads that failed a test or said no wait here. Nobody is deleted. Your decision teaches the ads.



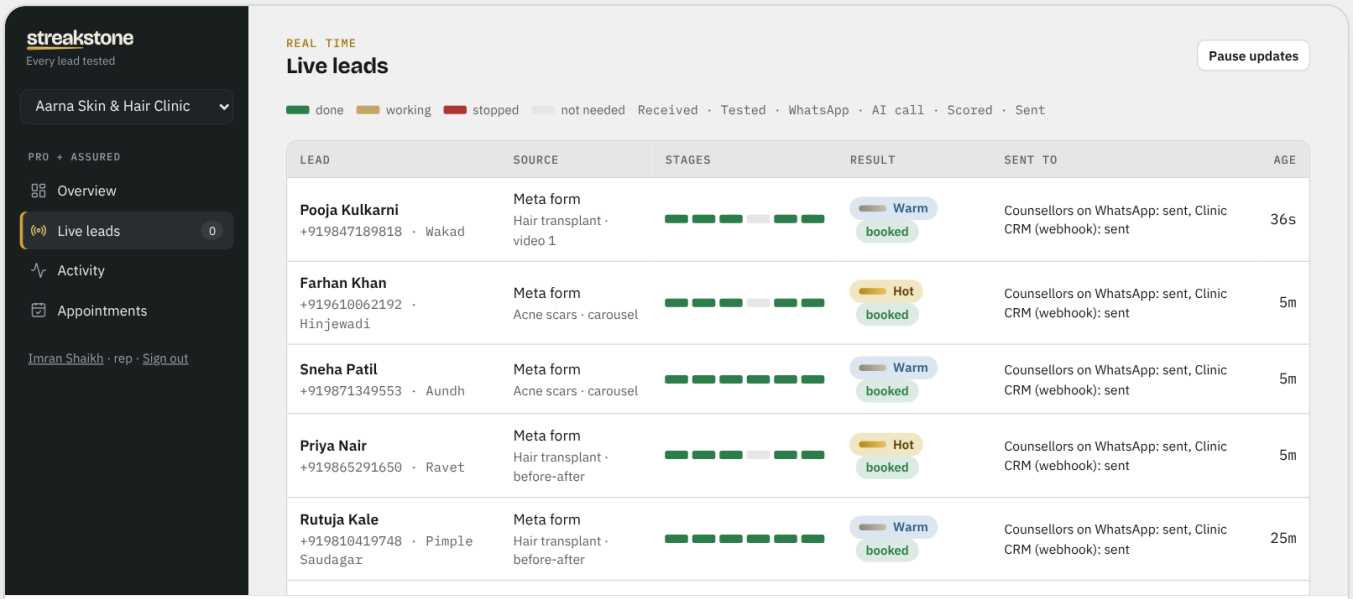
Held for review, signed in as the manager

1. Read **Why held** on each row: fake or pattern number, duplicate, outside area, junk text, Meta test lead, filled too fast, or what the person said on the call.
2. **Release to team** when it was a real person. It goes to your destination like any passed lead.
3. **Confirm junk** when it was not. Meta is told, so it finds fewer people like this.
4. If the same reason keeps holding good leads, change it in Rules, for example add an area or relax the duplicate window.

COUNSELLOR

Your leads, on WhatsApp first

Counsellors see only the leads assigned to them. Most of the work happens on WhatsApp.



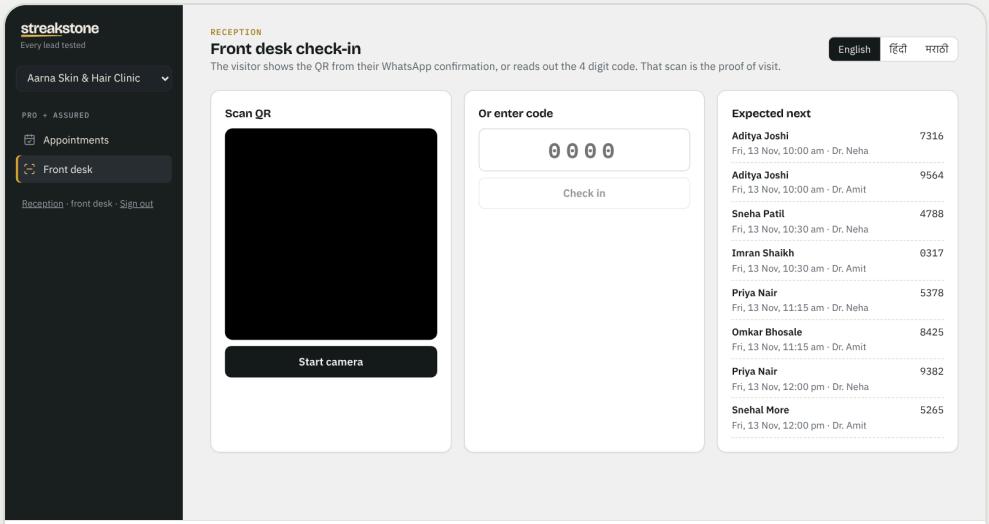
Live leads, signed in as a counsellor: only their own leads

1. A hot or warm lead arrives on your WhatsApp: name, number, area, why it qualified and the answers. The owner adds your WhatsApp number on the Team page so leads reach you.
2. Call the person. Then reply to that message with one number: **1** called, **2** booked, **3** not interested, **4** sold, with the amount if you know it.
3. That one reply updates the lead in Streakstone and your CRM and tells Meta. No form to fill in.
4. If a lead has no update for the hours your owner set, you get a reminder on WhatsApp.
5. Open Live leads in the app to read the full conversation before you call.

FRONT DESK · STREAKSTONE ASSURED

Check people in with a scan

On Assured plans, Streakstone books qualified leads into your calendar and sends a WhatsApp confirmation with a QR pass and a 4-digit code.



Front desk check-in on a tablet or laptop

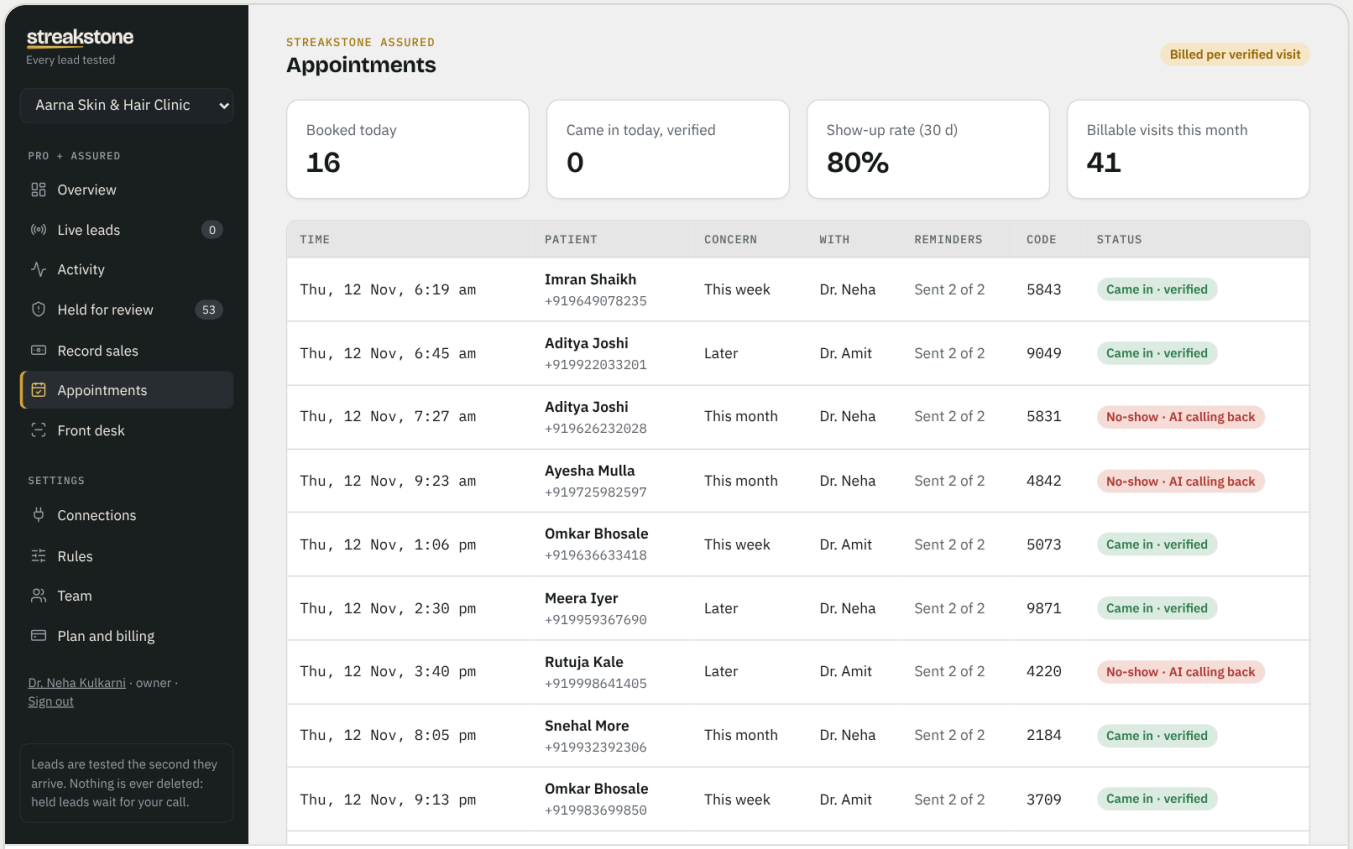


The pass the visitor shows

1. Open **Front desk** on the reception tablet, laptop or phone and tap Start camera. Pick English, हिंदी or मराठी; the choice stays on that device.
2. Scan the QR on the visitor's phone, or type the 4-digit code they read out.
3. The visit is verified. It shows on Appointments and the owner's Overview, Meta is told who came, and only verified visits are billed.
4. **Expected next** lists who is due in the coming hours. Install the page on the phone's home screen to open it like an app.

OWNER · ASSURED

Appointments: booked, reminded, verified



Appointments

1 The cards show booked today, came in today and verified, the show-up rate for 30 days, and billable visits this month.

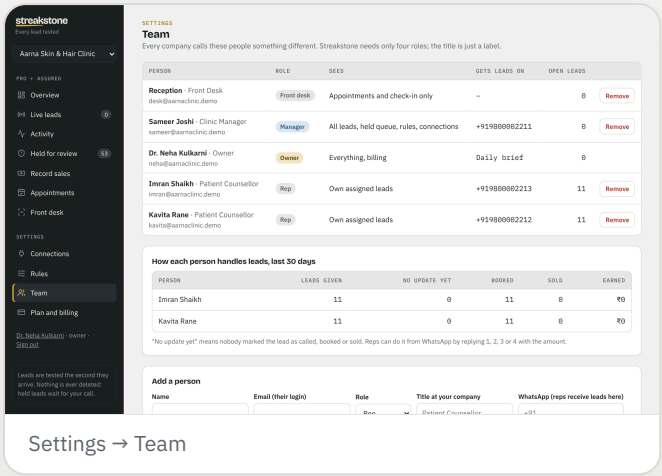
2 Each row shows the time, the visitor, concern, doctor, reminders sent, the visit code and the status: booked, came in and verified, or no-show with the AI calling back.

3 No-shows are called automatically with a new slot.

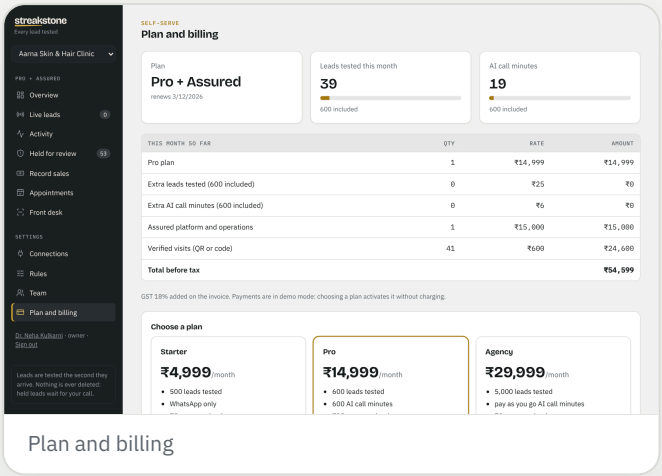
4 **Add calendar slots** at the bottom: the doctor or consultant, start times and how many days ahead.

OWNER

Team, plan and billing



Settings → Team



Plan and billing

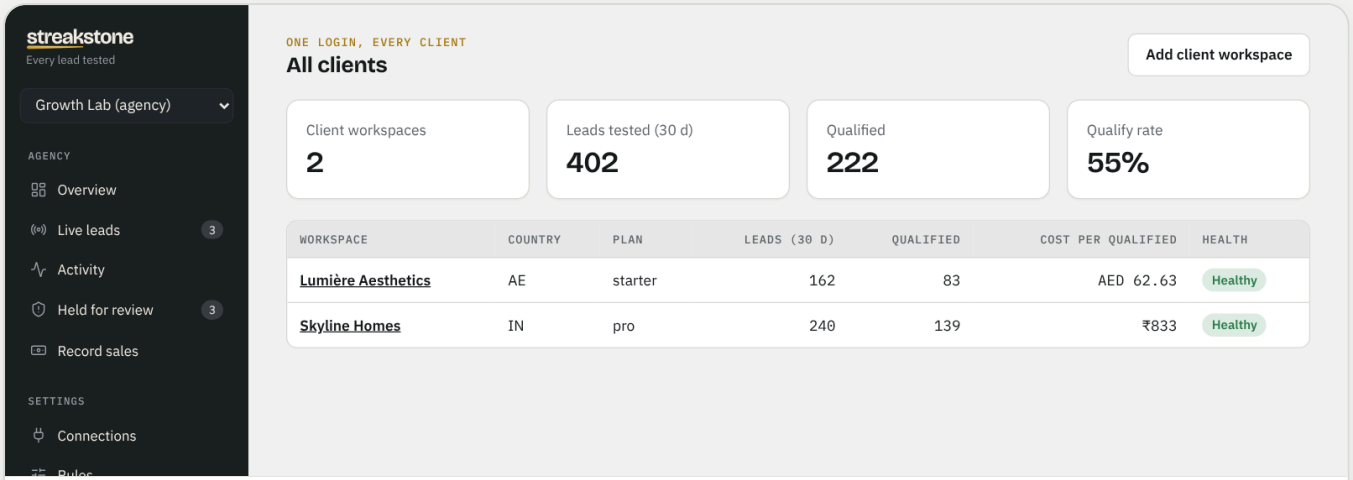
Team

Four roles: owner, manager, rep and front desk. The title is just a label, so call people what your company calls them. Add a WhatsApp number for anyone who should receive leads. "How each person handles leads" shows, per person, leads given, those with no update yet, booked, sold and earned. Remove people any time.

Plan and billing

Leads tested and AI call minutes this month against what your plan includes, a running invoice preview with tax noted, and the plans to switch to. India pays through Razorpay, other countries through Paddle.

One login for every client



All clients, signed in as the agency

Agency

1. **All clients** shows each workspace with country, plan, leads tested, qualified, cost per qualified and health.
2. Click a client to work inside it with the same screens its owner has.
3. **Add client workspace** sets up a new business with its own industry pack.

Agency client

1. The business signs in with the login its agency created.
2. It sees its own workspace only, with the full Overview. Other clients stay invisible.
3. It can review held leads, record sales and add its own team, like any owner.

ROUTINES

Ten minutes a day, by role

Owner, each morning

- Read the daily brief on WhatsApp.
- Open Overview, last 7 days: check cost per qualified lead and the ad advice.
- Pause what the advice says to pause, scale what works.

Manager, twice a day

- Clear Held for review: release real people, confirm junk.
- Record sales for leads that bought.
- Look for one reason holding too many good leads, and fix it in Rules.

Counsellor, all day

- Call each lead that arrives on WhatsApp, quickly.
- Reply 1, 2, 3 or 4 after every call.
- Act on reminders for leads with no update.

Front desk, each visit

- Scan the QR or type the code before the visitor sits down.
- Check Expected next at the start of each shift.

Each Monday

The week's ad advice arrives on the owner's WhatsApp: what to scale, keep or pause.

Each month

A sales report on WhatsApp, with a link to record any sales still missing.

Getting help

Try any level in the demo with the logins on page 2. The homepage at streakstone.com has a walkthrough of each level and a working copy of the Overview on sample data.