User Manual

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End-user manual

Guide for tenant **Administrators** and **Sales** users of the CRM.

Roles at a glance

Capability	Admin	Sales (default)
Customers / Leads / Tasks day-to-day	Yes	Yes (with some limits)
Manage users & roles	Yes	No
Connect channels	Yes (`manage.channels`)	View only
Inbox view + WhatsApp reply	Yes	Yes
Assign inbox conversations	Yes	No
Company settings	Yes	No

Exact rights can be customized under **Roles**.

Sign in

1. Open your company CRM URL.
2. Sign in with email/password.
3. You land on **Dashboard**.

Forgot password uses the email reset flow (requires mail to be configured by your operator).

Customers

Customers → add, edit, search, import/export CSV.

Customers are won/converted accounts (also created when converting leads).

Leads

Leads supports list and board (kanban) views.

Common actions:

- Create / edit lead
- Move status on the board
- Assign (if permitted)
- Log activities
- Convert to customer

- Import/export CSV

Follow-up dates drive reminder notifications when the scheduler is running.

Inbox

Inbox shows conversations from connected messaging channels (WhatsApp today).

1. Open a conversation (unread clears on open).
2. Read the thread; open linked lead if present.
3. **Reply** sends a WhatsApp message when the channel supports it.
4. Admins can **Assign** and change status (Open / Pending / Closed).

Closed conversations must be reopened before replying.

Tasks

Create and update tasks, change status, use the task board.

Due/overdue reminders appear when enabled by your operator.

Reports

Open **Reports** for company metrics. Export if you have `export.reports`.

Channels (admins)

Administration → Channels

1. **Connect channel** — choose provider (Generic Webhook, Facebook Lead Ads, WhatsApp, …).
2. Enter credentials shown on the form.
3. Copy webhook URL / secrets / verify token as instructed.
4. Use **Test connection**, **Sync**, **Disconnect**, or **Regenerate webhook secret** as needed.

Providers marked **Adapter coming soon** cannot fully process events yet.

Detailed setup:

- Generic Webhook
- Facebook Lead Ads
- WhatsApp

Each company connects **its own** WhatsApp/Facebook/forms — data never mixes with other companies.

Users & roles (admins)

- **Users** — invite or create users, activate/deactivate, import CSV.
- **Roles** — adjust permissions. Do not remove critical admin access without a backup admin.

Plan limits may block adding users.

Company profile & settings (admins)

- **Company Profile** — read-only overview (logo, contact, plan badges).
- **Company Settings** — edit profile fields, regional defaults, business hours, logo.
- Saving settings returns you to the profile.

Notifications & profile

- Bell / **Notifications** — in-app alerts.
- **Profile** — password, photo, notification preferences, sessions.

Activity log

Activity Log shows important changes (lead updates, channel events, settings saves) for auditing.

Tips

1. If a webhook test succeeds in the tool but CRM doesn’t update, ask your operator to start the **queue worker**.
2. Never paste access tokens into chat or email.
3. For Meta on localhost, your operator must use **ngrok** (or staging HTTPS).

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