

SimplyMagic CRM

User manual | Review draft | 24 September 2026

From the first question to the next sale

SimplyMagic combines an automated voice assistant with a customer relationship management workspace. The assistant answers approved questions and collects the caller's needs and contact information. The interaction becomes a record for staff to review, assign, follow up, and turn into a sale.

The team remains responsible for checking customer details, choosing approved information, confirming availability and prices, preparing documents, and sending the right follow-up. An assistant's offer to help is not a confirmed booking, an email delivery receipt, or a signed agreement.

VOICE OR FORM -> CRM REVIEW -> STAFF FOLLOW-UP -> DOCUMENT -> NEXT ACTION

This draft teaches the existing sales workflow and identifies work still in development. It is not a release announcement. No customer messages, approvals, uploads, signatures, or payments were performed to make this manual.

All screenshots show actual application screens rendered locally with synthetic training data. Names and example.invalid addresses are fictional. Screens may include local changes that are not on the live server; every screenshot is labeled accordingly. Product and rental catalog items, categories, prices, and behavior remain unchanged.

Contents and availability guide

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Read the labels first

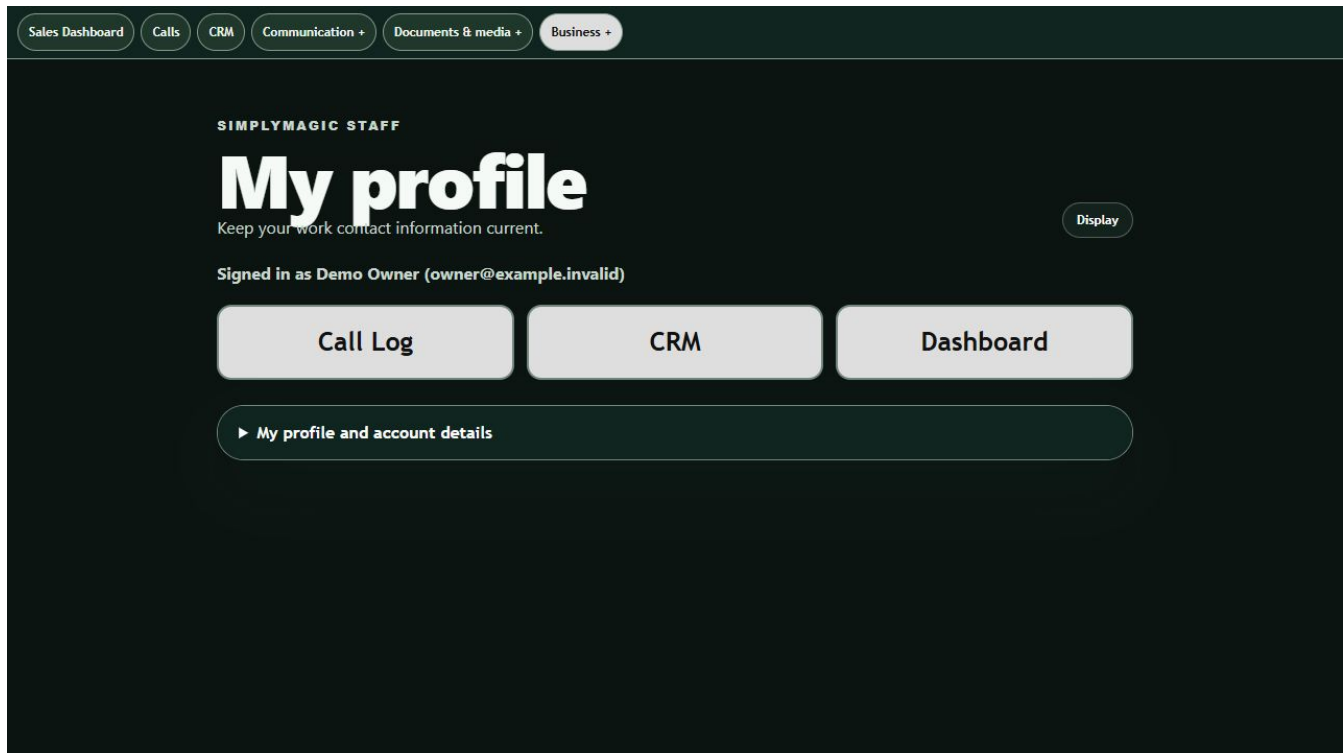
VERIFIED EXISTING means the project records describe deployed behavior or owner acceptance. It is not a fresh live test performed for this manual. The evidence date and source are summarized on page 22.

EXISTING CONTROL / REQUIRES CONNECTION means the screen or workflow exists, but provider authorization, permissions, or real-world acceptance is still needed. A visible button does not prove a connection works.

IN DEVELOPMENT means local implementation or requested work. The new daily dashboard, personal Calendar view, Gmail inbound importer/scheduler, and automatic reply-task completion are not live features in this draft.

Sign in and find your tools

VERIFIED EXISTING - Profile landing and main entry points; menu grouping shown is local.



Signed-in profile

Screen guide: 1 - Confirm the signed-in account. 2 - Open Call Log, CRM, or Dashboard. 3 - Expand profile details when you need to edit them.

1. Open the CRM address supplied by your business administrator and sign in with your approved Google account. Invitations use the exact invited email address.
2. On My profile, check **Signed in as**. Complete the first-login profile if it is expanded and required. Keep your work contact information and timezone current, then use **Save my profile**.
3. Use **CRM** for customer work and **Call Log** for calls and conversations. The existing Dashboard is a launch page; the new daily task panel is separately labeled on page 16.
4. Use **Display** for the available viewing preferences. App theme does not determine the colors of printable PDFs or authored email content.

The local menu groups Communication, Documents & media, and Business collect existing destinations. Older releases may show these as individual links. On phones, expand the relevant section. Your permissions still determine access.

Review and assign a new lead

VERIFIED EXISTING - Customer profile workflow. Classification cleanup is local/in development.

The screenshot displays the 'SIMPLYMAGIC SALES' CRM interface. At the top, there's a navigation bar with tabs: Sales Dashboard, Calls, CRM (selected), Communication +, Documents & media +, and Business +. Below this, the 'Customer runway' section is visible. A search bar contains the text 'Search name, company, phone, email...'. To the right of the search bar are filters: 'All' (selected), Name, Company, Phone, and 'Choose a profile'. A dropdown menu shows 'Demo Contact — Company: Example Event Company - Phone:'. Below the search bar, the 'CUSTOMER PROFILE' section for 'Demo Contact' is shown. It includes fields for 'EMAIL' (contact@example invalid), 'CONTACT PHONE' (202-555-0100), and 'STAGE' (Lead). There are buttons for 'Choose another customer', 'LEAD' (selected), and 'Delete profile'. A checkbox for 'Use guided sale workflow' is checked. Below this are buttons for 'Analyze & add information', 'Dictate profile update', and 'Merge duplicate profiles'. An 'Assigned user' dropdown shows 'Demo Salesperson'. At the bottom, there's a section for 'Customer and workflow' with a plus sign to expand it.

Customer profile

Screen guide: 1 - Search and choose the correct profile. 2 - Check the customer's identity. 3 - Review the assigned user before saving.

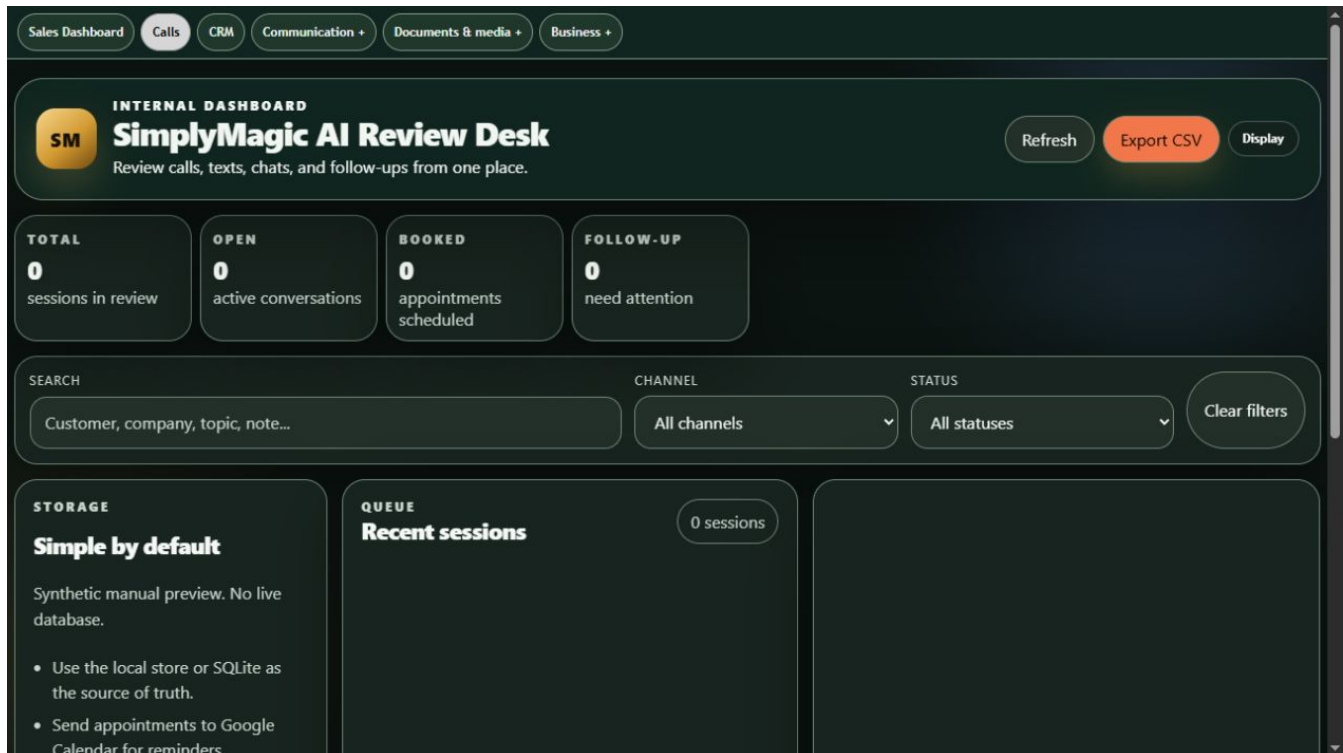
1. For a new form or call, first search CRM by name, company, email, or phone. Use **All / Name / Company / Phone** and **Choose a profile** to distinguish similar records. Use **+ New lead** when a genuinely new record is needed.
2. Expand **Customer and workflow** and **Company information**. Check the contact, company, source, and handling brand. Review owner/management contacts and project/event information where relevant.
3. Select the intended **Assigned user**, review stage and next action, and choose **Save profile**. Record missing facts as missing; do not guess an owner from a similar company name.

Keep three identities separate: your **business workspace** owns the CRM data; the **brand/division** handles the inquiry; the **customer company** is the organization buying or asking. Assignment is the staff member responsible for follow-up.

Automatic multi-brand form routing and large-volume intake improvements remain unfinished. Review unknown or unassigned leads manually. Preserve historical dropdown values; do not reclassify records just because labels differ.

Review a call or conversation

EXISTING CONTROL / REQUIRES CONNECTION - Review desk; live voice behavior needs separate acceptance.



Call review desk

Screen guide: 1 - Refresh the queue. 2 - Filter by search, channel, and status. 3 - Select a session in Recent sessions; this safe fixture has no caller records.

1. Open **Calls** or **Call Log**. Search the customer or topic, and use channel/status filters. If nothing appears, try **Clear filters** before assuming a call is missing.
2. Select the matching session. Read the summary and transcript, check the contact details, and verify which division the caller wanted. Follow the customer link or existing lead action when available.
3. Add a concise note with what was requested, what remains uncertain, and who will act. Update the conversation status to match the actual outcome.
4. Use **Schedule follow-up** for an agreed next contact. Check the current appointment before changing it. Google actions require the correct connected account and successful provider response.

The approved voice flow asks which division the caller wants, then asks only for missing name/language information. It answers briefly using approved facts and collects only relevant missing details. Do not treat a spoken appointment offer as a booking. Exact interrupted-introduction resumption and end-to-end information sending are not established by the current evidence.

Add information with Paste & Analyze

VERIFIED EXISTING - Review/commit workflow; extraction accuracy depends on the source and provider.

The screenshot shows the 'LOCAL OWNER TOOL' interface. At the top, there are navigation tabs: 'Sales Dashboard', 'Calls', 'CRM', 'Communication +', 'Documents & media +', and 'Business +'. Below these is the 'LOCAL OWNER TOOL' header with the title 'Paste & Analyze' and a 'Display' button. A subtitle reads: 'Turn emails, screenshots, photos, and notes into linked CRM records without overwriting existing information.' The main area is split into two panels. Panel 1, '1 - PASTE SOURCE', is titled 'Customer information' and has a 'Clear' button. It contains a dropdown for 'Information type' with 'Email thread' selected, a large text box for pasting or dictating information, and a button 'Choose destination profile and field group'. Panel 2, '2 - REVIEW', is titled 'CRM field preview' and shows a dashed box for the preview. A message at the bottom of the preview box says: 'The extracted fields and existing-profile match will appear here.'

Information intake screen

Screen guide: 1 - Select the source type. 2 - Paste the source information. 3 - Review the extracted fields before committing anything.

1. From a customer, use **Analyze & add information** to retain that customer's context, or open **Paste & Analyze** from Communication.
2. Select the information type. Paste the email thread or notes, or use the supported screenshot/photo input. Dictation requires browser support and microphone permission; typing or keyboard dictation is the fallback.
3. Open **Choose destination profile and field group**. Select the exact profile and intended contact/company/project/event field group. Use the visible profile match rather than assuming the first result is correct.
4. Choose **Analyze and find profile**, then inspect every proposed value. Use the available fill-empty or update-existing policy intentionally. Correct mistaken names, numbers, and destinations before approving the save.
5. Confirm the reviewed update, save, and open the resulting profile to check it.

The September 23 correction can place a single discovered email into both Contact and Company email in the review preview, while preserving distinct extracted addresses. It does not migrate old records or guarantee OCR accuracy. Gmail inbox import is a different, unfinished feature.

Write an email with templates and signatures

VERIFIED EXISTING - Recipient picker, canned insertion, signature, and accepted Gmail workflow.

The screenshot shows a web interface for composing an email. At the top, it says 'Synthetic email - no sending' and 'NEW EMAIL'. Below that is the heading 'Build customer email'. The 'To' field contains 'customer@example.invalid'. A dropdown menu below it says 'Choose an email from this customer' and 'Select saved email...'. There are buttons for 'CC' and 'BCC', and below them, 'CC myself' and 'BCC myself'. The 'Subject' field contains 'Agreement review'. The 'Message' section has a 'Canned email' dropdown with 'Choose saved email...' and a 'Use email' button. There is also a 'Replace subject' checkbox, a 'Signature' dropdown with 'Choose signature...', and an 'Add signature' button. A 'Manage saved replies' link is shown with a note '1 saved emails available. Nothing sends automatically.' and a 'Save as template' button. A rich text editor toolbar is visible with options for font (Arial), size (Normal), bold (B), italic (I), underline (U), bulleted list, numbered list, link, unlink, text color, background color, undo, redo, and insert image. At the bottom, there are buttons for 'Copy email', 'Send with connected Gmail', and a link 'Review in email app'.

Customer email composer

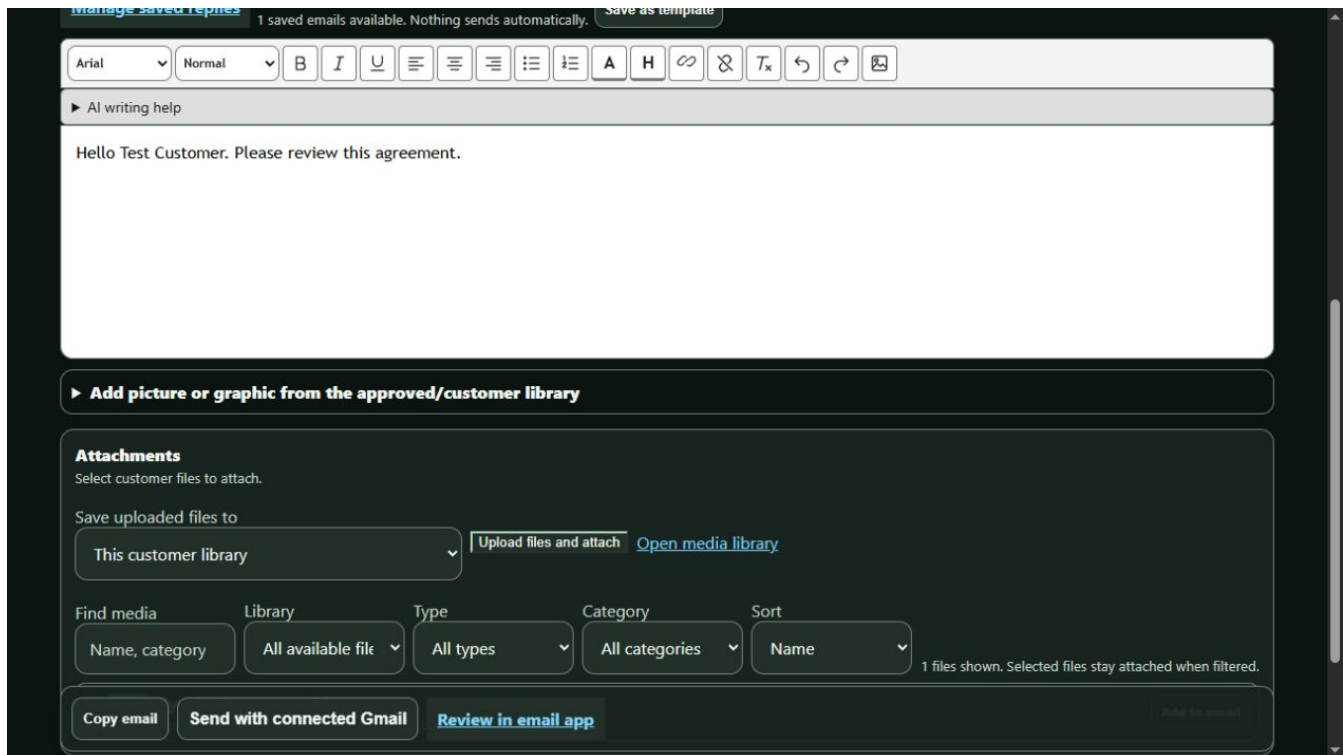
Screen guide: 1 - Review To and saved-address choices. 2 - Expand CC/BCC as needed. 3 - Choose canned wording and a signature.

1. Open the correct customer's **Email** or **Create new email** action. Verify the profile before writing.
2. Enter **To** manually or use **Choose an email from this customer**. The picker identifies the source, such as Contact, Company, Owner, Management, or this customer's history. Check the address itself, not just its label.
3. Expand **CC** or **BCC** if required. Use **CC myself** or **BCC myself** only when you want that copy.
4. Set the subject. Place the cursor where the canned text belongs, choose **Canned email**, and select **Use email**. **Replace subject** is optional and normally off. Review the inserted text in context.
5. Choose the intended **Signature** and select **Add signature**. Keep one managed signature at the bottom; check for duplicate manually pasted signatures.

Formatting, links, and body images are separate from attachments. White email bodies with black text are intentional. Optional AI writing help shown in this local screenshot is not treated as a confirmed live release here.

Upload, review, and send attachments

VERIFIED EXISTING - Direct upload, destination choice, visual review, and Gmail send workflow.



Email attachments

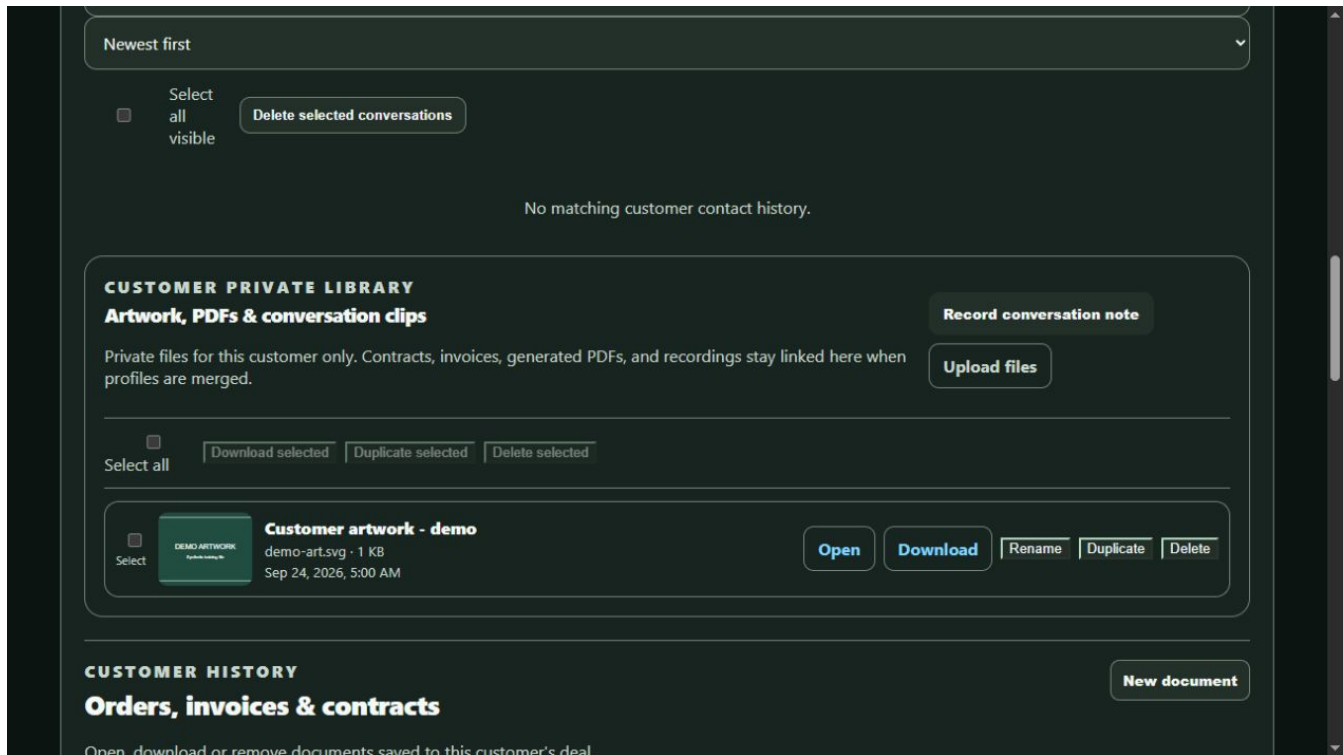
Screen guide: 1 - Body image insertion is separate from attachments. 2 - Choose the storage destination before upload. 3 - Review the selected files before sending.

1. Under **Save uploaded files to**, choose **This customer library**, **Shared company library**, or **Both libraries**. Use customer storage for private customer artwork/documents. Both explicitly associates a file with both libraries; avoid duplicate attachments.
2. Choose **Upload files and attach**. The draft, recipients, and signature should stay in place. Wait for completion and check the resulting file selection and approval state.
3. Find existing files with **Library**, **Type**, **Category**, search, and sort. Select only the intended customer files or approved shared media, then **Add to email** where shown. Filtering does not remove previously selected attachments.
4. Choose **Send with connected Gmail** and inspect the pre-send review: To, CC, BCC, message, signature, and attachment checkboxes/thumbnails. Remove unintended files, then explicitly confirm the send.
5. Check the send result and the saved customer history. Provider acceptance is not proof of recipient reading. **Review in email app** opens a separate mail application; do not assume that action logs a CRM send.

Shared files still follow approval rules. Uploading or approving a file is not the same as emailing it. Never retry an uncertain send repeatedly without checking history first.

Keep customer files and history together

VERIFIED EXISTING - Customer-private library and linked document history.



Customer-private library

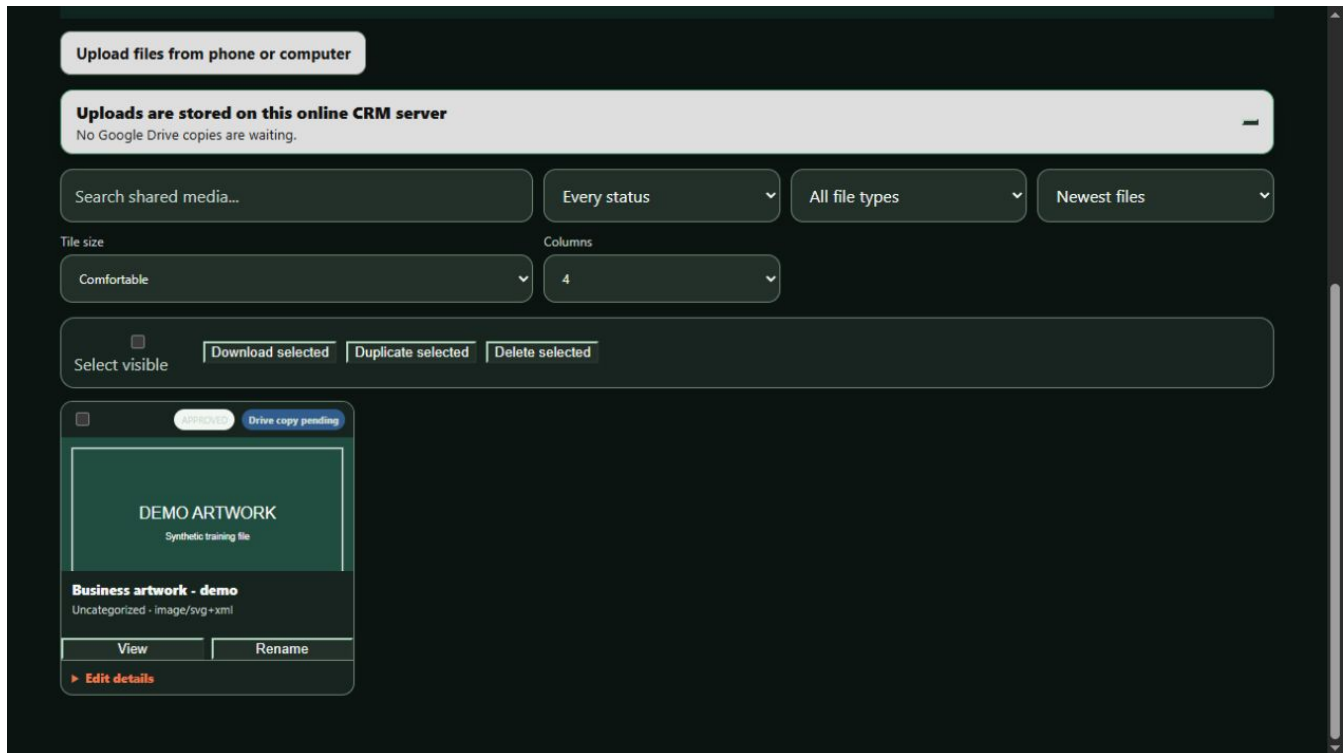
Screen guide: 1 - Confirm Customer Private Library. 2 - Open or download the selected customer's file. 3 - Find orders, invoices, and contracts in Customer History.

1. In the customer's profile, locate **Customer Private Library**. Use **Upload files** for that customer's supported artwork, PDFs, or recordings. Review the customer's identity before choosing files.
2. Use **Open** to inspect an uploaded file and **Download** to keep an authorized local copy. Use **Rename** for a clearer display name. A friendly rename must not break the stored link or rewrite past sent-email attachment names.
3. Use **Customer History** to reopen the customer's saved order, invoice, or contract. Generated PDFs also belong in the customer's private library. Editing a linked document returns to its saved order; an arbitrary uploaded PDF is not automatically an editable order.
4. Review contact/email history before following up. Preserve the thread, original request, and file provenance so another staff member can understand the next step.

Customer-private files do not become reusable business media simply because they are approved. Linked/used files can be protected from deletion; ask the owner to review the reference rather than trying another delete route. A customer self-upload invitation or public upload portal is not established as generally available in this draft.

Manage reusable business media

VERIFIED EXISTING - Online storage, View/Rename, and reference protection. File-type enhancements shown are local.



Business media library

Screen guide: 1 - Search/filter the business library. 2 - Inspect approval status. 3 - Use View or Rename for the intended file.

1. Open **Media Library**. Use the upload control for reusable business material you are authorized to share. Do not use it as the default destination for private customer artwork.
2. Search and filter by the controls available in your release. Review status and thumbnail, then **View** the file itself. A successful upload does not guarantee every device can decode its preview.
3. Use **Rename** to make a file discoverable while keeping its extension. **Edit details** provides the existing metadata/approval tools appropriate to your permissions.
4. Review a staged submission before using its individual approval action. In Business Workspace, the existing content queue has per-item **Approve** actions. The requested cross-library **Approve selected** workflow is still in development.

Online uploads are usable from the CRM server without Google Drive backup. A Drive-copy indicator refers to optional synchronization, not permission to use the file. Search/status/type filters do not grant access to other businesses or customer libraries. Existing bulk download/duplicate/delete controls are distinct from the unfinished bulk-approval request.

Prepare a quote, agreement, or invoice

VERIFIED EXISTING - Order/PDF workflow, terms selection, saved document history. Review every final PDF.

1. Open the correct customer and select **Create order / invoice** or **Create contract**. Check the customer/company and event details, including delivery/setup and removal information where applicable.
2. Use the existing catalog and order line items. Review description, quantity, rental days, rate, prepayment, discounts, and line totals. This manual changes no products, rental choices, categories, or catalog prices.
3. Check the order's **Invoice details** and notes. Keep customer-wide facts separate from this order's instructions. Save the order and confirm the values remain when reopened.
4. Select the appropriate PDF/document type and saved template, or **Standard CRM PDF layout**. Choose the correct saved terms from the existing terms library. Use only owner-approved wording.
5. Review subtotal, discount, tax, extras, total, deposit, and balance separately. For example, a 4,500 subtotal less 723 discount is 3,777 before applicable tax/fees; this is arithmetic, not a catalog quote.
6. Generate the PDF and inspect every page: parties, dates, quantities, totals, notes, clauses, and signature blocks. A saved template needs the agreement terms merge field to include selected clauses. Do not send a document with missing terms or overflow errors.
7. Use **Add to email**, select the intended canned email/signature, and follow the attachment review on page 8. Set the next action after sending.

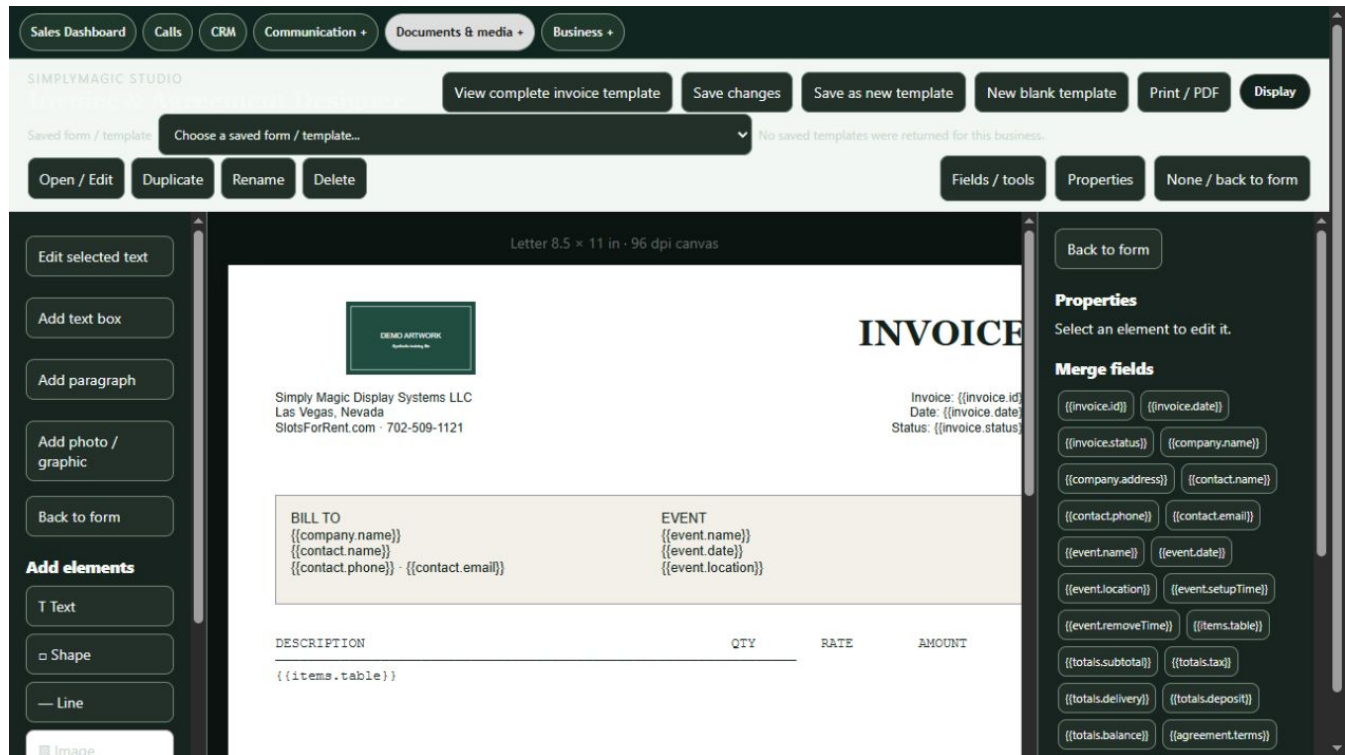
Keep the original document record

Open/View uses the customer PDF viewer. Its existing actions include **Edit**, **Add to email**, and **Download**; close the viewer to return to the customer. Duplicate when an independent revision is needed. Historical PDFs and their original wording must remain intact.

An optional selected PNG/JPEG provider signature is supported by the stock PDF layout; this does not establish an electronic signing service or customer acceptance. Do not add a signature or mark an agreement accepted without the actual authorization and evidence.

Design an invoice or agreement template

EXISTING CONTROL - Designer and saved templates. Current local layout and some interactions require release verification.



Invoice and agreement designer

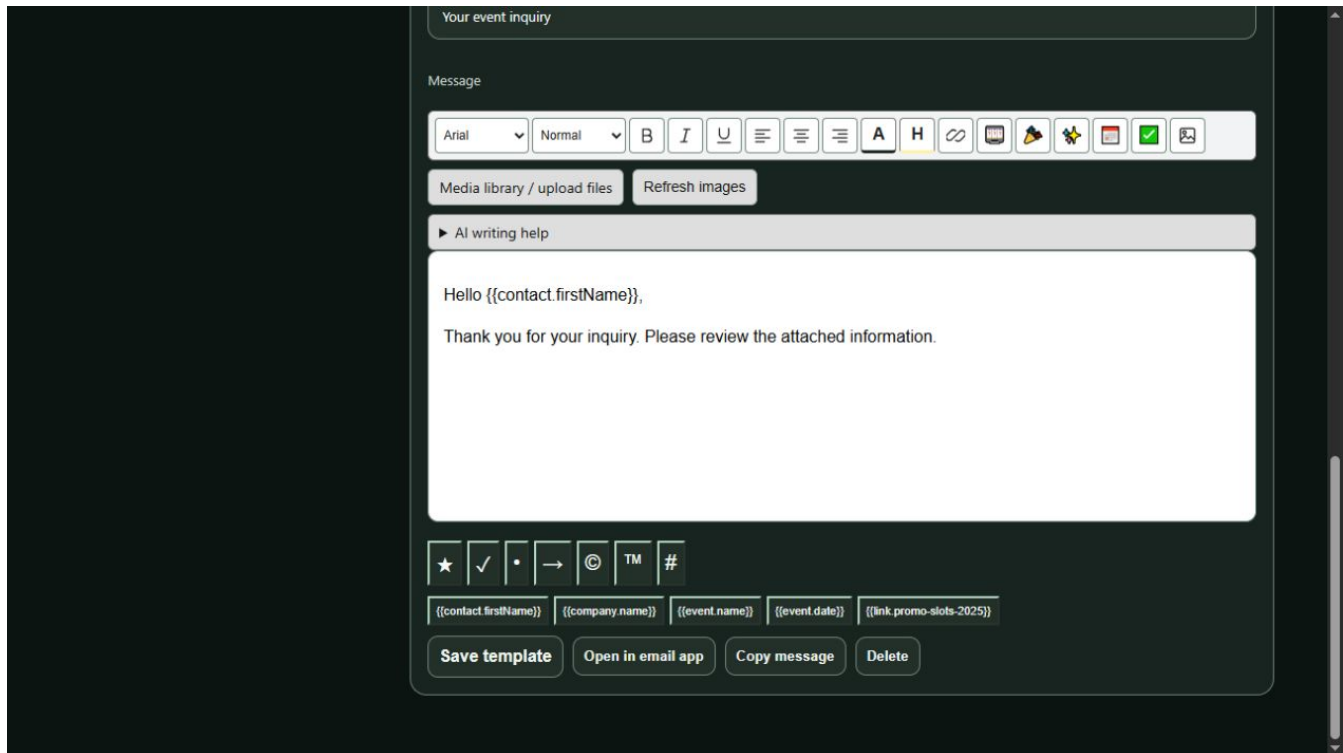
Screen guide: 1 - Select a saved template and its management action. 2 - Add/edit elements on the canvas. 3 - Insert the correct merge fields.

1. Open **Invoices & Contracts**. Choose the saved form/template by name and confirm it loaded. An empty saved list in this training image is intentional; the canvas shows a starter with synthetic artwork.
2. Use **Duplicate** or **Save as new template** for a separate design. Use **Save changes** only when you mean to revise the selected template. Do not overwrite an approved original accidentally.
3. Add text, paragraphs, graphics, shapes, lines, or pages using the visible tools. Select an element and use Properties. Use customer/event/invoice merge fields instead of typing one customer's private information into a reusable layout.
4. Include **agreement.terms** when the layout must carry selected clauses. Keep signature blocks and order notes intentional. Inspect every page with **View complete invoice template**.
5. Save, reload, and generate a sample customer PDF before relying on the design. Browser **Print / PDF** alone is not proof of the CRM-generated document output.

This screenshot preserves the actual local screen, including its header contrast/layout limitations. Use the labeled instructions above where screen text is small. No customer template was edited for this guide.

Create reusable emails and signatures

VERIFIED EXISTING - Saved replies/signatures. AI helper and upload-library shortcuts shown are local additions.



Email template designer

Screen guide: 1 - Format reusable wording. 2 - Use merge fields for customer context. 3 - Save the template separately from sending a message.

1. Open **Email & Text Replies**, then **Email & social templates**. Select an existing template to edit, or use + **Create template**. Duplicate a useful starting point when preserving its original wording matters.
2. Set Name, Channel, Brand, Tags, Purpose/description, and Subject. Use the signature channel for reusable signature content where available. Match the handling business/brand.
3. Write the message and insert supported merge-field buttons such as contact first name, company, or event. Test the result from a real selected customer before sending; a missing field should not become an invented fact.
4. Use approved business images in reusable templates. Private customer files do not belong in a general-purpose template. Save the template and meet any approval requirement before team use.

Copy message and **Open in email app** are separate from CRM delivery. **Save as template** in the customer composer opens a new unsaved template; inspect it for customer-specific details before saving. Optional AI drafting/review must be previewed and explicitly applied. It does not send, approve, or save automatically; real provider and microphone use need verification.

Design and publish a lead form

EXISTING CONTROL / REQUIRES RELEASE CHECK - Form Designer; new routing and multi-page requests are not assumed complete.

Form Designer

Screen guide: 1 - Add CRM fields or design elements. 2 - Fit/zoom and align the form. 3 - Review settings, save, and publish deliberately.

1. Open **Form Designer** and select the intended form under **Saved forms**, or start a new draft. Verify the brand and saved form identity before changing it.
2. Use **Add CRM fields** for structured customer/event data and **Design elements** for headings, copy, images, and submission controls. Move/resize elements and use alignment tools; review required fields and labels.
3. Set the form background, field text/background, choices, and success message through the existing settings. Keep labels readable. Resizing a field changes its visible width, not the permitted length of the customer's answer.
4. Use **View complete form** and check the full page, then **SAVE** the draft. **Publish** is a separate intentional action. Under **Publish & Share**, use the saved public link/embed options appropriate to the form.
5. Before public use, verify the published page on desktop and phone, submit an authorized test, and check the resulting CRM record, business/brand, and assignee. A preview alone does not prove lead routing.

The screenshot is the real local starter form, not an approved production design. Do not add required questions merely because they exist in the field toolbox. Additional form pages and expanded routing require separate

acceptance.

Set the next action and follow up

VERIFIED EXISTING - Profile/conversation follow-up. New unified task automation is not live.

1. After reviewing a lead, sending information, or preparing a document, record what happens next. In the customer workflow fields, select the available **Next action** and the responsible **Assigned user**. Save the profile.
2. Add a clear note that another staff member can act on: what was requested, what you sent, what is still needed, and when you will follow up. Avoid treating an automatic acknowledgment as a human reply.
3. For a scheduled contact, use the existing conversation **Schedule follow-up** controls. Verify date, time, timezone, and customer. Check the saved appointment after returning to the record.
4. At the start of the day, use CRM search/filters and Calls status to review assigned work and pending follow-ups. Open the customer's history before sending another message.
5. Update the stage only when the actual sales situation changes. Stage describes progress; next action describes the next task. Do not treat either as evidence of payment or signed acceptance.

Existing dropdown values

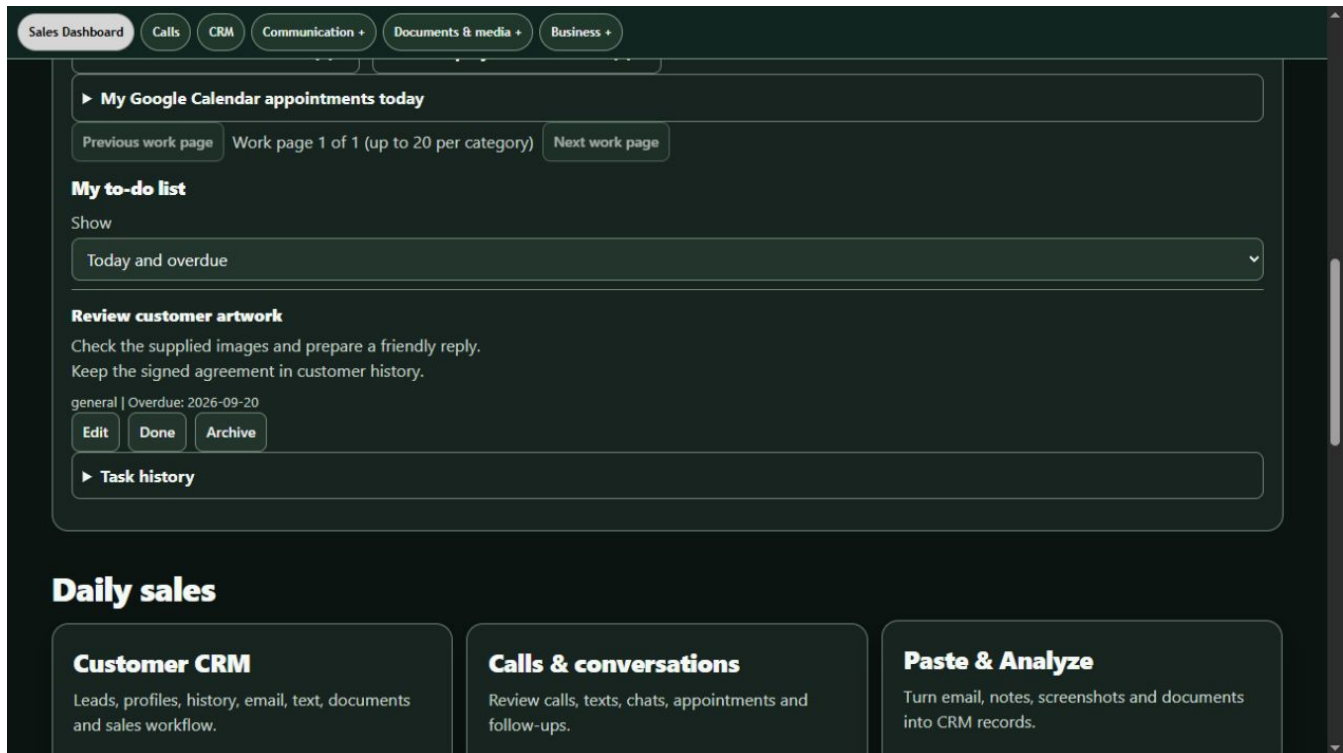
The live audit recorded stages including Lead, Client, Wrong info, Pending, Make agreement, Send info, and Call contact. The proposed replacement stage taxonomy is not installed by this manual. Local changes preserve saved legacy choices and separate next action from stage; confirm the released behavior before relying on the new lists.

One reliable handoff

An effective note could read: "Customer requested the event overview. Reviewed recipient and attached approved information. Waiting for event date confirmation; assigned salesperson to call on the agreed date." Use the facts of the real conversation, not this sample wording automatically.

Preview the new daily dashboard

IN DEVELOPMENT - Local preview only. Daily dashboard and personal Calendar are not live in this draft.



Daily dashboard task list

Screen guide: 1 - Show active, upcoming, completed, or archived tasks. 2 - Review the original due date. 3 - Edit, Done, Archive, and Task history affect the task record.

The local panel adds summary categories for new leads, calls, follow-ups, appointments, customer email review, and active projects/contracts. Brand and assignment filters narrow accessible work. Counts are not proof of high-volume production capacity.

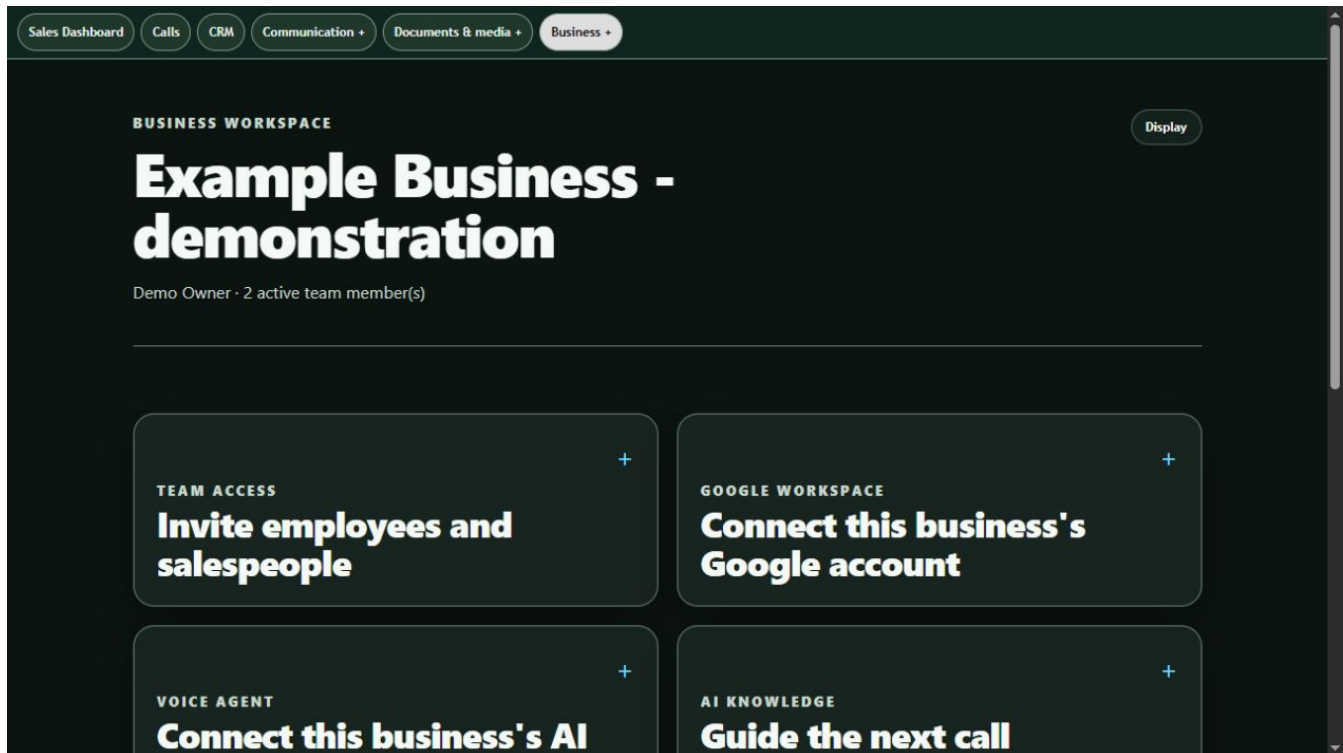
The local **Add to-do** flow accepts a title, paragraph, type, and due date. Unfinished, unarchived tasks carry forward with their original due dates. **Done** retains completed history; **Archive** hides work without declaring it finished; **Reopen** returns retained work to active use. These actions should not delete the source customer, file, email, or appointment.

The personal Google Calendar panel is a separate consent/read integration, not the business owner's Calendar automatically shared with employees. Real Google consent/provider acceptance is pending.

Gmail incoming-message checks, twice-daily scheduling, attachment import, and automatic reply-task creation/completion remain unfinished. Until a separately verified release is announced, use the existing manual follow-up workflow on page 15.

Manage the business workspace

VERIFIED EXISTING / REQUIRES CONNECTION - Business-specific controls; independent-business acceptance remains a gate.



Business workspace

Screen guide: 1 - Confirm this business's identity. 2 - Open staff invitation tools. 3 - Connect the appropriate business account only when authorized.

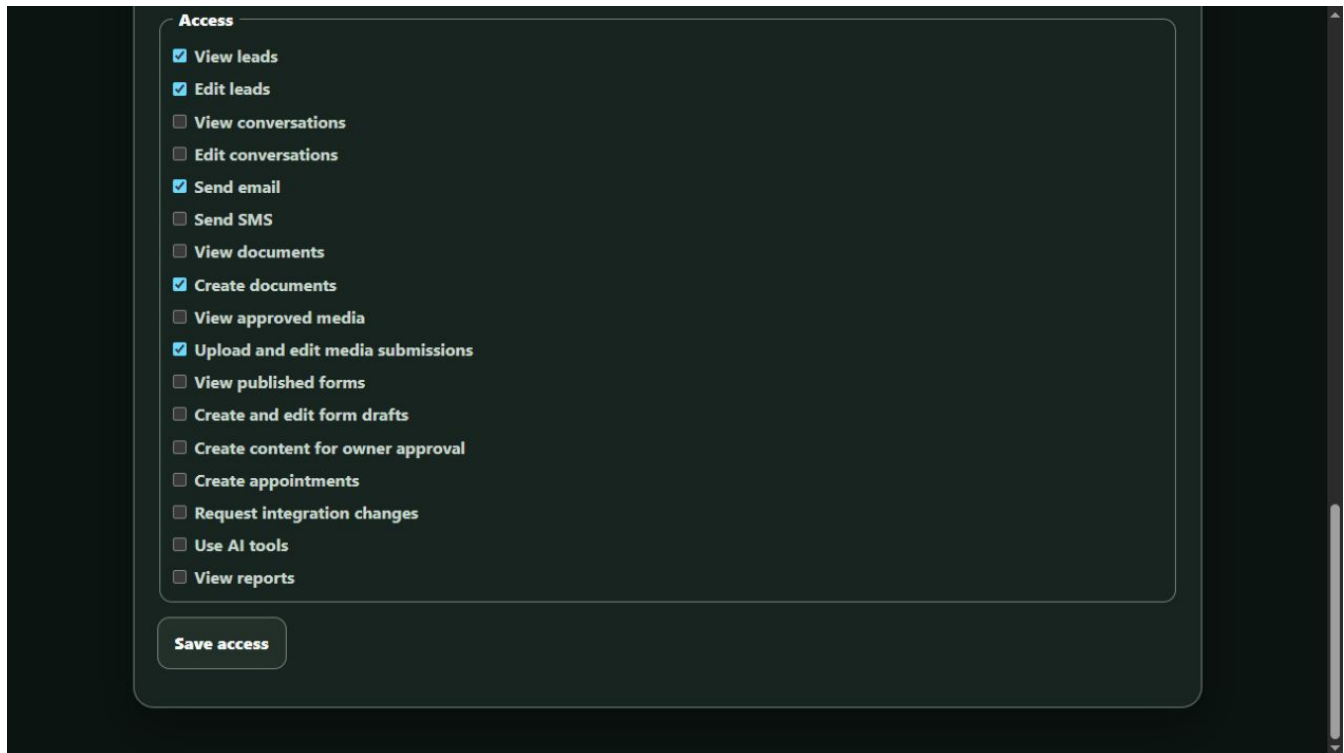
Open **Business Workspace** as the business owner or authorized administrator. Its expandable sections contain team access, Google account setup, voice configuration/guidance, CRM dropdowns, content approval, subscription statements, and team members.

1. Check the business name and signed-in user before managing staff or connections. Business owners manage their own workspace; access to platform settings does not grant access to another business's private customers.
2. Use **Review employee submissions** to inspect pending links, templates, forms, or media and use the individual **Approve** action when the item is appropriate for its intended scope.
3. Use CRM dropdown settings only for authorized classification maintenance. Preserve existing labels and assignments unless a reviewed migration is explicitly approved. Product/rental catalogs are excluded from the current cleanup.
4. Review **Statements and usage** for this business's own subscription information. This panel is read-only for the tenant owner; it is separate from invoices sold to customers.

The screenshot contains fictional business data and no configured Google/Twilio credentials. Broad deployment records do not replace real two-business invitation, Google, mobile, and isolation acceptance checks.

Invite staff and manage permissions

VERIFIED EXISTING - Business team controls; authorization must be checked on the server.



Staff permission controls

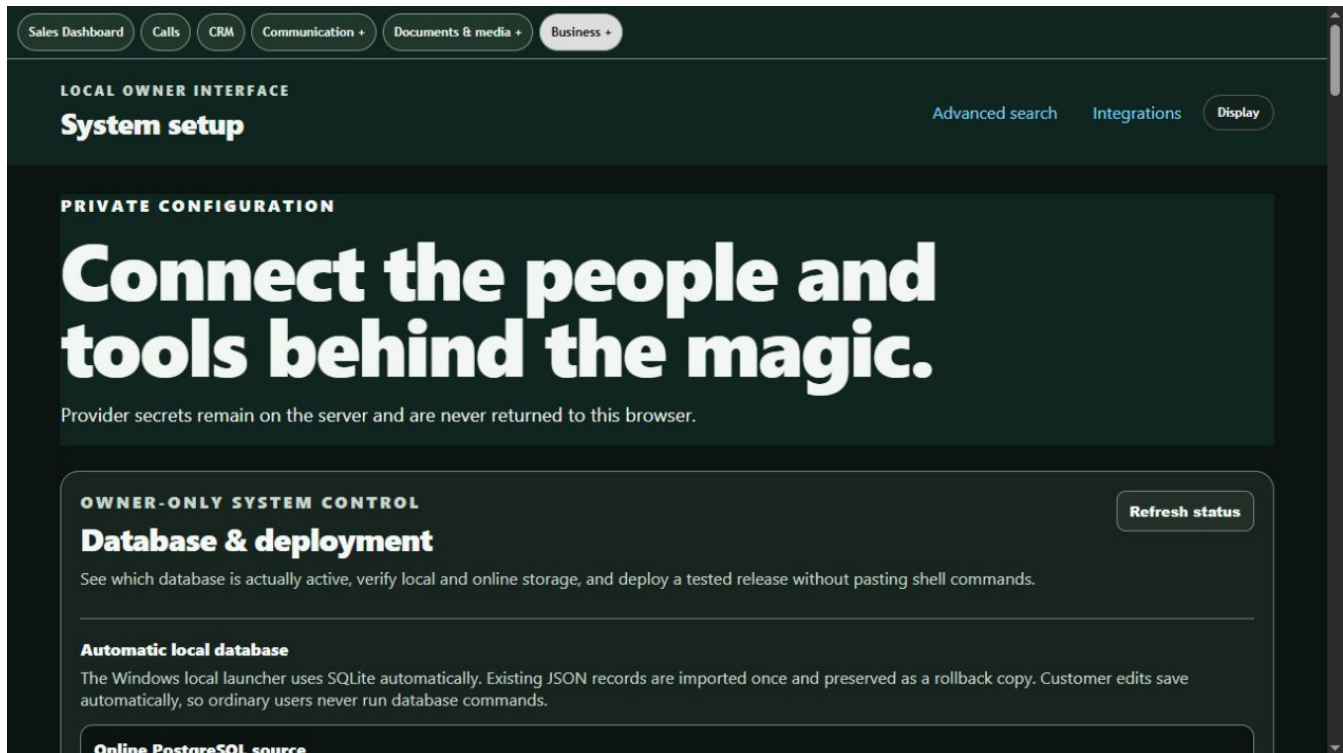
Screen guide: 1 - Grant only the needed feature access. 2 - Distinguish email/document/media permissions. 3 - Save access for the intended team member.

1. In **Business Workspace**, expand **Invite employees and salespeople**. Enter the staff member's correct name and Google email, select the intended role and initial permissions, and create the invitation through the existing flow.
2. Give the invitation only to the intended person. They sign in using the exact invited account and complete their profile. An invitation is not proof that onboarding finished.
3. Under **People in this business**, confirm the person's identity and status. Review Role and the Access checkboxes, then choose **Save access** for that person.
4. Verify the user can perform the intended work and cannot access unrelated private data. A staff role, manager/team relationship, and customer assignment are different concepts.

Permissions include viewing/editing leads and conversations, sending email/SMS, viewing/creating documents, viewing/uploading media, forms, AI tools, integrations, appointments, and reports. The screen illustrates a subset of permissions; it is not a recommended default grant. Do not use browser visibility or a brand filter as a security boundary.

Use Owner Setup and settings

EXISTING CONTROL / REQUIRES CONNECTION - Administrative tools; screen presence does not verify provider or deployment state.



Owner Setup

Screen guide: 1 - Verify that this is the owner configuration area. 2 - Read actual database/connection status. 3 - Refresh status before drawing conclusions.

Owner Setup provides existing administrative sections for storage/deployment diagnostics, AI/voice/messaging, Google Workspace, users/roles, dropdowns, and contract terms. Some hosted links are intentionally permission-restricted. Ordinary sales work stays in CRM and Business Workspace.

1. Read the connected server's status before changing anything. Local Windows state, packaged code, and the live online service are different. The screenshot's disconnected status is synthetic training data.
2. Maintain approved voice opening, product information, and additional call guidance in their intended controls. Changes intended for the next call still require a real call check. Never put API keys or passwords into voice knowledge or customer notes.
3. Manage reusable terms by selecting the intended saved terms, reviewing clauses/signature blocks, and saving or duplicating deliberately. Do not rewrite historical PDFs or substitute unapproved wording.

Keep credentials in the designated protected setup fields and share them only through the owner's established secure process. Do not use data-maintenance, catalog, deployment, or database controls to solve an ordinary customer workflow problem. This manual provides no deployment or payment authorization.

Understand connections and platform billing

EXISTING CONTROL / REQUIRES CONNECTION - Outbound provider features. Inbound Gmail and personal Calendar work remain in development.

Gmail sending versus Gmail reading

The accepted outbound Gmail workflow sends a reviewed CRM draft with its signature and selected attachments through the connected account. The account's send permission does not establish permission to read an inbox.

The separate customer-only Gmail sync specification calls for explicit read consent, an initial last-30-days import, and twice-daily checks. Matching, self-copy deduplication, blank-only profile updates, received attachments, and reply tasks are planned/local components. The importer and scheduler are not live; do not expect Gmail replies to appear automatically in CRM yet.

Calendar, Drive, and other tools

Existing appointment/provider controls require the correct account and successful connection. The new personal Calendar dashboard must not borrow another user's authorization. Drive backup is optional for online CRM uploads. Sheets/CSV exports require permissions and contain the records in the selected authorized scope.

Content holds business information and links. **Image Generator** requires AI configuration and review before reuse. **Reports** provides existing activity/reporting tools; do not assume every requested salesperson drill-down or high-volume report has been accepted. **Connections/Integrations** exposes available provider setup. Public AI/widget and SMS workflows need their own connection and acceptance checks.

Keep subscription billing separate

Customer quotes and invoices sell your business's products/services. Platform subscriptions pay for use of the CRM. The platform owner controls subscription packages, terms, invoice/payment-state records, and onboarding; a business owner sees only its own statements and usage.

An auto-pay flag or invoice status is not proof a card was charged. A generated invoice is not proof it was emailed or paid. No connected payment processor or automatic collection is established by this manual. Automatic Windows bidirectional sync and full offline mirroring also remain incomplete.

Troubleshoot everyday problems

I cannot find a customer, task, or control

Check **Signed in as**, the intended business, search mode, selected profile, and filters. Try **Clear filters** where available. Expand collapsed sections on a phone. Ask the business owner to verify your permissions. New dashboard and Gmail sync controls may not exist in your live release.

A saved address, template, or signature is missing

Check the correct customer's Contact/Company fields and the intended brand/library. Keep manual To entry available. Open the existing reply library and refresh the composer after saving a template. Do not paste another customer's private information into a reusable reply. The complete personal-per-user library audit remains unfinished.

A file will not preview, attach, or delete

Use **View/Open**, check the upload finished, and use **Retry** if shown. Verify supported type, approval, library destination, and permissions. Test **Download** if preview alone fails. A linked-file deletion refusal protects customer history. Optional Drive status is not a reason to discard an online file. The original reported iPhone image failure was not fully reproduced.

Email sending fails or the result is uncertain

Preserve the draft and review the connected account, recipients, selected files, and permissions. Read the error and inspect customer history before retrying. Do not report success solely because the composer closed or a mail application opened. Ask the owner to verify Gmail authorization if needed.

A PDF is missing terms or does not fit

Check document type, selected layout, saved terms, merge fields, and order notes. Inspect every generated page. Use the saved order's Edit route or duplicate a template for a reviewed correction; do not remove required clauses just to make the page fit.

A save conflicts or the screen looks wrong

Keep a copy of unsaved wording, reload the record, and compare the current version before saving again. Check Display settings and browser zoom. Report the page, action, error text, approximate time, and whether the issue is local or online. Avoid including customer files or credentials in an unrestricted support screenshot.

Evidence, coverage, and review limits

Basis of this draft

Reviewed project guidance: AGENTS.md; REQUIREMENTS.md; STATUS.md; DEPLOYMENT.md; VOICE-FLOW.md; SALES-WORKFLOW-ROADMAP-20260924.md; WORKFLOW-MENUS-20260924.md; DROPDOWN-CLEANUP-PROPOSAL-20260924.md, plus relevant public page/controller source.

Deployed/accepted evidence used: AGREEMENT-WORKFLOW-20260921.md, PDF-SCREEN-20260921.md and template/invoice records; EMAIL-REPAIR-20260922.md; EMAIL-RECIPIENT-PICKER-20260923.md; EMAIL-UPLOAD-20260923.md; PROFILE-LANDING-20260923.md; VERSION-2-ACCEPTED-20260923.md; INTAKE-EMAIL-20260923.md; MEDIA-ONLINE-20260924.md; MULTI-BUSINESS-ONBOARDING-20260915.md. Later evidence takes precedence over older general status notes.

Development boundaries: DAILY-WORK-IMPLEMENTATION-20260924.md, GMAIL-CUSTOMER-SYNC-20260924.md, EMAIL-AI-HELPER-20260924.md, MEDIA-TYPE-FILTER-20260924.md, and the sales roadmap. A local test or screenshot never upgrades a feature to live.

Screenshot coverage

Included: profile, CRM, call review dashboard, Paste & Analyze, customer email editor, attachment controls, customer-private files, business media, invoice/agreement designer, email template designer, Form Designer, daily dashboard, business workspace, staff permissions, and Owner Setup.

All 19 captures use actual current local UI assets with synthetic data. The call desk shows an empty safe queue. Designer artwork is synthetic. Local UI differences include the reorganized menu, new dashboard, AI helper, and media-type additions. Some designer header text has a known local contrast limitation; it is not presented as a live acceptance result. Reports, Content, Image Generator, and Integration Hub have additional screen guides on pages 23-26.

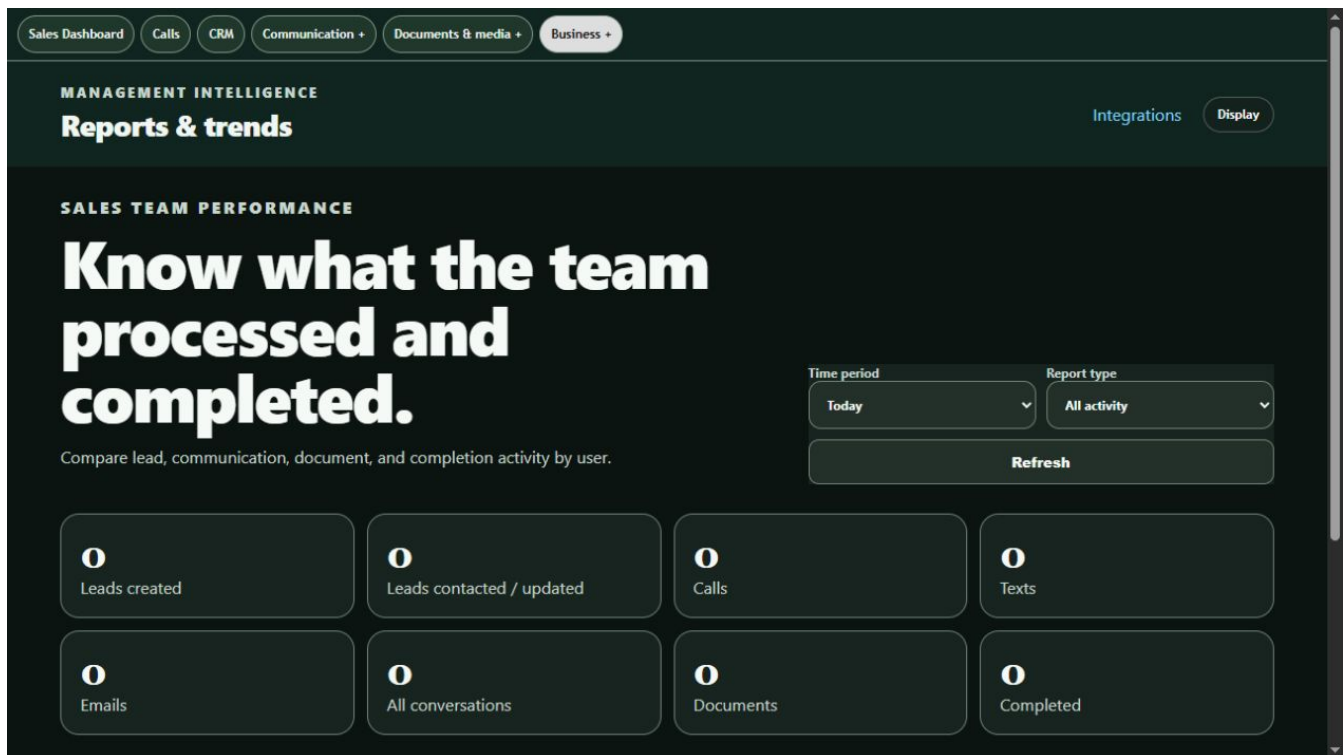
Before publication

The owner should review terminology and task steps against the approved release. Missing acceptance evidence includes actual customer PDF/signature selection, complete personal libraries, real independent-business onboarding/provider flows, some physical-phone interactions, new Gmail/Calendar automation, and customer self-upload access. Populated transcript, sent-mail, document-viewer, platform-billing, and public voice/widget screenshots are not included; their workflows are documented without exposing private records. This draft does not claim exhaustive coverage of every subcontrol.

This manual is a review draft. Publication, in-app Help integration, and release verification are separate work.

Read and export reports

EXISTING CONTROL - Source-rendered reporting screen; figures shown are synthetic zeros.



Management reports

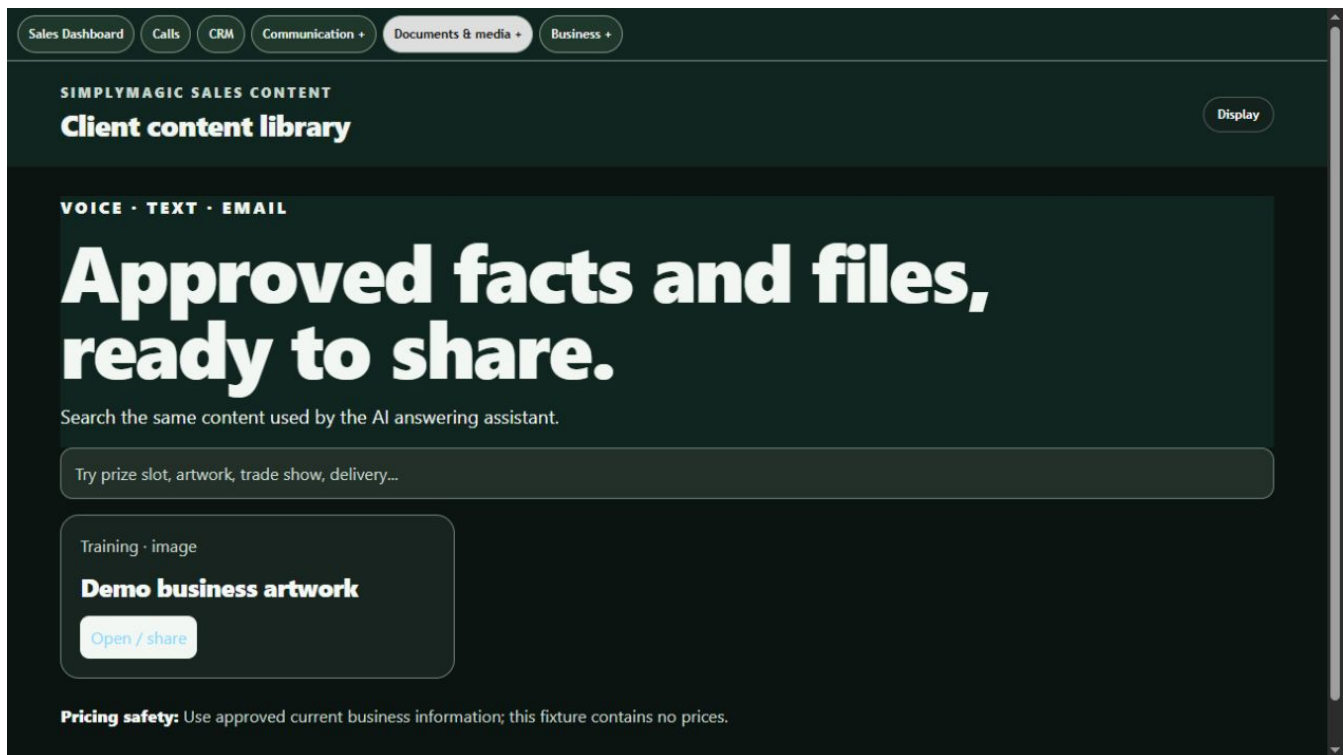
Screen guide: 1 - Choose the time period. 2 - Choose the report type and refresh. 3 - Read the totals in the selected scope.

1. Open **Reports** using an account with report permission. Select **Time period**: Today, Last 7 days, Last 31 days, or Last 366 days.
2. Select **Report type** for All activity, Lead processing, Calls/texts/emails, Documents, or Completed work. Choose **Refresh** and check the generated time.
3. Scroll to **User detail** to compare the returned rows. Verify the period, business, and meaning of each measure before using the numbers for a decision.
4. Use **Export CSV**, **Export spreadsheet**, or **Print / Save PDF** for the current report when authorized. Keep exported customer/team information in approved business storage.

The current table is not proof that every requested interactive salesperson drill-down is implemented. Blank rows or zero counts can reflect the selected scope or an empty demo; they are not automatically proof of missing production records.

Find approved content

EXISTING CONTROL - Searchable content and source information; verify facts before sharing.



Content library

Screen guide: 1 - Search for the topic. 2 - Open the relevant content item. 3 - Check the pricing/source guidance.

1. Open **Content** and search a product, service, event topic, or document title. Use this library to find approved information and linked files.
2. Review the matching title/type and choose **Open / share** for the intended item. Check the actual file or source before using it in customer communication.
3. Return to the customer's email editor to include the approved information. Check the link destination and attachment/private-file rules before sending.

Catalog labels alone are not the voice assistant's complete knowledge source. Approved knowledge documents and configured voice instructions also matter. Do not infer current pricing, availability, partnerships, or venue commitments from a generic graphic or an outdated document. A website-thumbnail automation request is not a reason to fabricate an image of a website.

Prepare a generated graphic

EXISTING CONTROL / REQUIRES CONNECTION - No image generation was run for this manual.

Image generation controls

Screen guide: 1 - Write a title and clear description. 2 - Select format, brand, and category. 3 - Review the result in the media workflow.

1. Open **Image Generator** with the required permissions. Enter **Image title** and **Describe the image** using approved business facts and the intended use.
2. Choose **Aspect ratio**, **Category**, **Brand**, **Tags**, and **Visual direction**. Review the instructions before **Generate and add to media pool**; provider configuration and usage rules apply.
3. Inspect the generated preview for accuracy, text errors, suitability, and permissions to use its content. Use the existing media review route and approval process before sharing it with customers.

Generated images enter a staged review workflow; generation does not mean approval or sending. The blank preview in this screenshot is intentional. No real provider result, automatic publishing, or product claim is established by the screen.

Review connection configuration

EXISTING CONTROL / REQUIRES CONNECTION - Registration is separate from a working adapter.

Integration Hub

Screen guide: 1 - Review built-in provider setup. 2 - Identify the intended endpoint and connector type. 3 - Save configuration only after authorized review.

1. Open **Connections/Integrations** with the appropriate permission. Review the available built-in provider status. Use **Open protected provider and OAuth settings** for authorized account configuration.
2. For an approved custom connection, enter Connection name, Connection type, Base URL or endpoint, and internal notes identifying its intended scope and adapter owner.
3. Review **Enabled in registry** and use **Save connection configuration** only when the configuration is intended. Do not paste credentials into the name, URL, or notes.
4. Have the responsible administrator verify the installed adapter, permissions, and an authorized end-to-end exchange before treating the connection as operational.

A registered API, BI, webhook, MCP, or warehouse endpoint does not create an integration by itself. Empty built-in/custom lists in this screenshot are synthetic training data. This setup page does not make the unfinished Gmail inbound scheduler or Windows sync available.