VODOO CRM

New User Documentation

Your complete guide to contacts, pipeline, email & SMS, campaigns, automation, payments and more

Contacts & Pipeline	Email & SMS Inbox	Automation	Analytics & Reports

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Overview of every chapter in this documentation

01

Introduction & Quick Start

What VODOO CRM is, who it's for, and how to start in minutes

What is VODOO CRM?

VODOO CRM is an all-in-one business platform for agencies, entrepreneurs and growing teams. It centralizes contacts, sales pipeline, email and SMS conversations, campaigns, marketing automation, payments and analytics into one workspace.

Who is it for?

Business type	Primary use case
Digital agency	Client CRM, reporting, white-label delivery
E-commerce	Orders, customer messaging, repeat sales
Coach / Trainer	Leads, booking, online courses, payments
Real estate	Pipeline, automated follow-ups, appointments
Restaurant / Local	Reservations, SMS campaigns, reviews
Freelancer / VA	Client management, invoicing, task lists

Quick Start — 7 steps to your first contact

1. Go to vodoocrm.com › click "Sign Up"
2. Enter your name, email and a strong password
3. Check your inbox and click the verification link
4. Complete the 4-step onboarding wizard (~3 min)
5. Add your Email channel (no setup needed) or your SMS channel
6. Import contacts via CSV or create one manually
7. Explore your Dashboard — you're ready to go!

What you can do with VODOO CRM

Capability	Benefit for you
Email & SMS inbox	Every email reply and text in one screen
Campaigns	Targeted email and SMS sends with tracking
Sales pipeline	Visualize every deal on a Kanban board
Automation	Auto-send messages and auto-reply to incoming ones
Lead capture forms	Pages that feed directly into your CRM
Online payments	Sell products and subscriptions via Stripe
Online courses	Host and sell video-based learning content
Review management	Automate Google, Trustpilot and Yelp review requests
Team collaboration	9 roles with granular module permissions

02 Account Setup & Onboarding

Create your account, verify email, and complete the setup wizard

Sign Up

1. Visit vodoocrm.com › click "Sign Up"
2. Enter First name, Last name, Email, Password
3. Accept the Terms of Service
4. Click "Create my account"
5. Open your inbox › click the confirmation link

Log In options

Method	How it works
Email + Password	Standard login on /login page
Google SSO	1-click OAuth — no password needed
Login code	A 6-digit code is emailed at each password login
Password reset	Click "Forgot?" › reset link sent by email

Forgot your password?
On the login page, click "Forgot password?"
Enter your email › receive a reset link.
Open it from the same browser to choose a new password.

Industry sectors (step 2 of wizard)

E-commerce · Real Estate · Health & Beauty · Education · Restaurant

Onboarding Wizard — 4 steps (~3 minutes)

Step	Page / Screen	What to fill in
1 — Welcome	/onboarding	Overview of the 3 pillars · Click "Get started"
2 — Organisation	/onboarding/org	Brand name · Website URL · Industry sector
3 — Channel	/onboarding/channel	Choose your main channel: Email or SMS
4 — Done	Final screen	Confirmation · Click "Go to Dashboard"

Connecting your channels

Channel	Pre-requisites	Where to configure
Email	Nothing — sending is handled by VODOO CRM	Settings › Channels › Email
SMS	Your own Twilio account + a number you own	Settings › Channels › SMS

Tip — Test your connection
Email: a reply address is created for you automatically.
SMS: VODOO CRM checks with Twilio that you own the number.
Channels can be configured later — skip this step
during onboarding if you don't have them ready yet.

03 Dashboard

Real-time overview of your business — KPIs, widgets, and navigation

Key Performance Indicators (KPIs)

Metric	Description	Trend indicator
Total Contacts	All contacts in your CRM	+ month-over-month
Active Conversations	Open email and SMS threads	- vs yesterday
Monthly Revenue	Revenue collected this month ($)	+ vs last month
Conversion Rate	% of leads converted to clients	stable ~24%

Dashboard widgets

Widget	Position	Data shown
Revenue Chart	Center	Monthly actuals vs target (line chart)
Recent Deals	Bottom left 2/3	Contact · Stage · Value · Assignee
Today's Events	Bottom right 1/3	Time · Event title · Status badge
Activity Feed	Bottom right 1/3	Icon · Action description · Timestamp

KPI trend indicators

+ Green arrow	Improvement vs previous period
- Red arrow	Decline vs previous period
› Grey arrow	Stable (change ‹ 1%)
% figure	Percentage change shown next to the arrow

Real-time data
The dashboard refreshes automatically via Supabase Realtime.
The greeting (Good morning / evening) adapts to your time.
No manual refresh needed — all KPIs update live.

Sidebar navigation

Icon	Module	Primary use
•	**Dashboard**	Daily overview & KPIs
•	**Contacts**	Client/lead database
•	**Pipeline**	Kanban deal tracking
•	**Conversations**	Email & SMS inbox
•	**Broadcasts**	Email & SMS campaigns
•	**Workflows**	Marketing automations
•	**Calendar**	Appointments & booking
•	**Funnels**	Lead capture pages
•	**Sales**	Products & orders
•	**Reputation**	Reviews & testimonials
•	**Courses**	LMS — online learning
•	**Tasks**	Team to-do list
•	**Analytics**	Reports & charts
•	**Settings**	Workspace configuration

Quick actions from the Dashboard

1. Click "New Contact" (top right) › quick-add form
2. Click "View all" under recent deals › /pipeline
3. Click any deal card › contact detail view
4. Click an event › day view in Calendar
5. Use ‹ arrow (sidebar bottom) to collapse the sidebar

04 Managing Contacts

Add, import, search, filter and manage your client database

Contact fields

Field	Required	Notes
First name	Yes	Used in personalisation variables
Last name	Yes	Combined with first name
Email		Required for email channel; also used as unique ID
Phone		Required for SMS — international format (+33…)
Company		Shown in lists and conversation headers
Source		Funnel / Email / SMS / Booking / Manual / Import
Tags		Multi-select labels for segmentation
Consent		Email / SMS unsubscribe status, with date

Importing contacts via CSV

1. Go to Contacts › click "Import"
2. Download the CSV template (click "CSV Template" button)
3. Fill in: First name, Last name, Email, Phone, Company, Source
4. Save the file as UTF-8 CSV (comma or semicolon separator)
5. Drag & drop into the upload zone
6. Check the preview › click "Import"

Import limits
Up to 1,000 contacts per CSV import.
Optional box: "these contacts agreed to receive my marketing" — records the consent source and date.

Search & filter

Search bar	Real-time (350ms delay): name, email, company
Source filter	Multi-select dropdown — filter by acquisition source
Tag filter	Filter contacts that have a specific tag
Contact counter	Updates live as filters are applied

Contact list columns

Column	What it shows
Avatar	Initials or photo · random colour background
Full name	First + Last (falls back to email)
Email / Phone	Clickable — opens email client or dialler
Source / Tags	Coloured badges for origin and segmentation
Last activity	Timestamp of most recent interaction
Actions …	View · Edit · Delete · Add note · Send message

Contact detail — 5 tabs

Tab	Content
General	Editable fields: name, email, phone, company, tags, source
Deals	All pipeline opportunities linked to this contact
Messages	Full conversation history across all channels
Tasks	Tasks associated with this contact
Orders	Purchase history and Stripe transaction records

Consent — email and SMS
A contact who replies STOP stops receiving your texts.
Every email carries a one-click unsubscribe link.
You can also unsubscribe or re-subscribe a contact by hand from their record (e.g. a phone request).

05

Sales Pipeline & Deals

Kanban board, deal creation, stages, lead scoring and pipeline management

Default pipeline stages

Stage	Meaning	Actions
New Lead	Incoming unqualified lead	View · Edit · Move
Qualified	Need identified, confirmed	View · Edit · Move
Call Booked	Discovery meeting scheduled	View · Edit · Move
Proposal Sent	Commercial offer submitted	View · Edit · Move
Negotiation	Discussing terms	View · Edit · Move
Won	Deal closed — lead converted	Dedicated "Won" button
Lost ×	Opportunity not pursued	"Lost" button + reason

Creating a deal

1. Click the "+" button on any Kanban column
2. Type the contact name › select from autocomplete
3. Enter deal value, assign a team member
4. Set probability (0–100%) and tags
5. Click "Save" › card appears on the board

Deal form fields

Contact	Autocomplete from CRM — required
Value ($)	Potential deal amount
Stage	Current pipeline stage
Assigned to	Responsible team member
Probability	0–100% closing score (lead score)
Tags	VIP · Hot · Urgent · Cold

Using the Kanban board

1. Go to Pipeline › select the pipeline (left sidebar)
2. Drag a card left/right to change its stage
3. Click a card to view or edit deal details
4. Use menu … to: Edit · Mark Won · Mark Lost · Delete
5. Toggle list view via the icon at top right

Lead scoring — probability thresholds

Score range	Meaning	Recommended action
≥ 70%	High closing likelihood	Prioritise — close this week
50 – 69%	Medium likelihood	Nurture — send proposal
30 – 49%	Low likelihood	Follow up — qualify further
‹ 30%	Very low likelihood	Re-engage or archive

Managing multiple pipelines

Action	How to do it
Create pipeline	Sidebar › "+" icon next to "Pipelines"
Rename pipeline	Right-click on pipeline name › "Rename"
Add a stage	Pipeline Settings › "Add stage" › name + color
Reorder stages	Drag & drop column headers on the board
Record loss reason	"Lost" button › type reason › confirm

Deal statuses

Active — deal is in progress on the pipeline.
Won — converted to client; shown in analytics.
Lost — closed without conversion; reason recorded.
Abandoned — inactive; removed from active pipeline.

06 Conversations — Email & SMS

One inbox for every email reply and text message from your contacts

Your two channels

Channel	How it works
Email	Sent by VODOO CRM on your behalf, in your organisation's name. Each Email channel gets its own reply address — contacts' answers land straight in this inbox.
SMS	Sent and received from your own Twilio account and number. Twilio bills you directly for your texts.

Sending a message

1. Click a conversation in the left-hand list
2. Read the history in the centre panel
3. Type your reply in the box at the bottom
4. Email: the subject is taken from the contact's last email ("Re: …")
5. Click Send or press Enter to send the message

Message status

Queued	Accepted by VODOO CRM, being handed to Email or SMS
Sent	Accepted by the provider (Resend or Twilio)
Delivered	Reached the recipient (email or phone)
Not sent	Refused — the reason is shown under the message

Consent is enforced for you
A contact who replied STOP cannot be texted again. START re-subscribes them. Unsubscribed contacts are skipped by campaigns and workflows automatically.

Conversation list — what each element means

Element	What it shows
Avatar + Name	Contact initials and company name
Message preview	Last message excerpt (yours or theirs)
Timestamp	"5 min ago", "Yesterday", "Mon." or date
Unread badge	Violet circle showing unread message count
Channel	Email or SMS
Status	Open · Snoozed · Closed

Conversation management actions

Action	How to perform it
Filter by channel	Channel tabs at the top: Email / SMS / All
Filter by status	Open / Snoozed / Closed tabs
Assign to member	Top-right menu › select a team member
Snooze	Put a conversation aside until later
Close	Mark the conversation as resolved
Search	Search bar by contact name or email

Replies from contacts
Email replies arrive in the conversation without the quoted previous message. Optionally, a copy of each reply can be forwarded to your usual mailbox (Settings › Channels).

07 Email & SMS Campaigns

Send one message to a targeted audience — Broadcasts module, Standard plan and above

Creating a campaign

1. Go to Broadcasts › click "New campaign"
2. Choose the channel: Email or SMS
3. Choose the audience: all contacts, some tags, or a list
4. Write the subject (email) and the message
5. Insert variables such as {{first_name}} with one click
6. Click "Send me a test" to check the result
7. Check the real number of recipients › confirm to send

Who receives it

Contact	Result
Has an email / phone number	Receives the campaign
Unsubscribed from this channel	Skipped — counted as "unsubscribed"
No email / no phone number	Skipped — counted as "no address"

Checked again at sending time
Someone who unsubscribes after you created the campaign is still skipped when the campaign actually goes out.

Email vs SMS campaigns

	Email	SMS
Sent from	VODOO CRM, in your organisation's name	Your Twilio account and number
Replies	Arrive in your inbox	Arrive in your inbox
Unsubscribe	One-click link added automatically	"STOP" mention added if missing
Sending hours	Any time	Mon–Sat, 8 am – 8 pm (your time zone)
Tracking	Delivered · opened · clicked	Delivered · failed
Length	No limit	Character and segment counter

Monthly email quota (emails sent by VODOO CRM)

Plan	Emails / month
Free trial	500
Basic	2,000
Standard	10,000
Pro	50,000
Agency	100,000

What counts
Campaign, workflow and one-to-one emails. Your usage is shown in Settings › Billing. Texts are not counted: they are sent and billed by your own Twilio account.

08 Workflow Automation

Build trigger-based sequences that run automatically in the background

Available triggers

Trigger	Fires when...
Form submitted	A funnel form is filled (any, or a chosen one)
Message received	A contact emails or texts you (auto-reply)
Payment received	A Stripe order is confirmed
Appointment booked	A calendar slot is reserved
Contact created	A new contact is added to the CRM
Tag added	A tag is applied (any, or a chosen one)
Pipeline stage changed	A deal changes stage (any, or a chosen one)
Manual trigger	A team member triggers it by hand

Available actions

Action	What it does
Send Email	Email with unsubscribe link; replies reach your inbox
Send SMS	Text sent from your own Twilio number
Condition (If/Else)	Branch Yes / No, e.g. "has the tag VIP"
Enroll in workflow	Start another workflow for the same contact
Delay / Wait	Pause before next action (min · h · d)
Add / Remove tag	Apply or remove a contact tag
Change deal stage	Move a deal to a different pipeline stage
Create task	Add a task to a team member's list
Send Webhook	POST JSON to an external URL
Request review	Send a review request email

Creating a workflow — step by step

1. Go to Workflows › click "New Workflow"
2. Enter a name and optional description
3. Choose a trigger — and, if offered, the tag, stage, form or channel
4. The visual editor opens with the trigger node
5. Click "+" under the node to add an action
6. Configure each action in the right-hand panel
7. Click "Save" then toggle the workflow ON

Message personalisation variables

{{first_name}}	First name of the contact
{{contact.full_name}}	First + last name of the contact
{{contact.email}}	Email address of the contact
{{contact.phone}}	Phone number of the contact
{{contact.company}}	Company name of the contact
{{org.name}}	Your organisation name
{{message.subject}}	Subject of the email received

Automatic replies — built-in safeguards

A "Message received" workflow never answers an out-of-office or another automatic reply, nor a STOP / START text, and runs at most once every 24 hours per contact.
Unsubscribed contacts are skipped and the step is logged.

09

Calendar & Tasks

Manage appointments, availability, booking links, and team tasks

Calendar features

Feature	Description
Monthly view	Grid with activity indicators per day
Navigation	‹ › arrows + "Today" button
Create event	Click a date › event creation form
Edit event	Click an existing event › edit panel
Delete event	Event detail › menu … › "Delete"

Event form fields

Title	Required — short name for the event
Date	Required — pick from date picker
Start time	Required — HH:MM format
End time	Required — HH:MM format
Contact	Optional — link to a CRM contact
Location	Optional — address or video call link
Status	Scheduled · Confirmed · Completed · Cancelled

Event statuses

Scheduled · Confirmed · Completed · Cancelled · No-show

Public booking link

URL format: vodoocrm.com/book/your-slug

Go to Calendar › Settings › "Booking link" tab.

Copy and share it by email, SMS or on your website.

Setting your availability

1. Go to Calendar › click "Settings" (top right)
2. Set available hours per day of the week
3. Choose meeting duration (e.g. 30 min, 1h)
4. Set buffer time between meetings (e.g. 15 min)
5. Select your timezone from the dropdown
6. Toggle "Public booking" on to activate the link

Tasks module

Tab	Shows
All tasks	Every task across the organisation
My tasks	Tasks assigned to you only
Completed	Tasks marked as done
Overdue	Tasks past their due date (highlighted)

Creating a task

Title	Required — short description of the action
Priority	High · Medium · Low
Due date	When the task should be completed
Contact	Optional — link to a CRM contact
Assigned to	Responsible team member

Completing a task

Check the checkbox to the left of the task title.

The task moves automatically to the "Completed" tab.

Completed tasks are retained for reporting purposes.

10 Funnels & Lead Capture

Build landing pages that capture leads and feed them into your CRM

What is a funnel?

A funnel is a sequence of web pages hosted on VODOO CRM. Visitors fill in your forms and are automatically created as contacts in your CRM. Each funnel has its own URL slug and optional custom domain.

Creating a funnel

1. Go to Funnels › click "New Funnel"
2. Enter a funnel name and URL slug
3. Optionally add a custom domain
4. Click "Create" to initialise the funnel
5. Add pages with the "+" button
6. Click "Edit" on any page › drag & drop editor
7. Configure form fields in the form block settings
8. Toggle the funnel to "Published" when ready

Funnel performance metrics

Views	Total visits to all pages in this funnel
Submissions	Number of forms fully completed and submitted
Conversion rate	Submissions ÷ Views × 100
Contacts created	New CRM contacts generated from this funnel

Page editor — how it works

1. Click "Edit" on a funnel page
2. Drag blocks from the left panel onto the canvas
3. Click a block to edit text, images or colors
4. Click the form block to add or remove fields
5. Click "Save" › your changes are persisted
6. Use "Preview" to see the live page in a new tab

Funnel actions

Action	How
Edit pages	Click "Edit" › opens page editor
Preview live	"View" button › opens in new tab
Duplicate	Menu … › "Duplicate" — full copy
Copy link	Menu … › "Copy link" › clipboard
Publish/Draft	Toggle Published / Draft on the card
Delete	Menu … › "Delete" (irreversible)

Automatic CRM integration

Each submission creates a new contact if the email does not already exist in your CRM.
Triggers the "Form submitted" workflow if configured.

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Sales, Products & Payments

Create products, manage orders, and accept payments via Stripe

Creating a product

Name	Required — product or service title
Description	Optional — detailed offer description
Price ($)	Required — amount in dollars
Price type	One-time payment OR Recurring subscription
Status	Active (visible) or Inactive (hidden)

Order table columns

Column	Shows
Contact	Client name and avatar
Products	List of items in this order
Total amount	Order grand total ($)
Status	Pending · Paid · Partial · Refunded · Cancelled
Date	Order timestamp
Actions	View · Refund · Download invoice PDF

Subscription management

Type	Billing cycle	Handled via
One-time payment	Charged once	Standard order
Monthly	Every calendar month	Stripe Subscriptions
Annual	Once per year	Stripe Subscriptions

Payment flow (Stripe Checkout)

1. Client accesses your product page or payment link
2. Redirected to Stripe Checkout (secure, hosted by Stripe)
3. Client enters card details (not stored by VODOO CRM)
4. Stripe confirms › webhook › order auto-created
5. Confirmation email sent automatically via Resend
6. "Payment received" workflow fires if configured

Security — PCI DSS compliance
VODOO CRM never stores card numbers or CVV codes.
All payments via Stripe (PCI DSS Level 1 certified).
3D Secure for EU payments (SCA regulation).

Billing portal & refunds

Customer portal	Subscriptions, invoices, payment method
Portal access	Via their account page or a link sent by email
Refund a payment	Sales › Orders › find order › click "Refund"
Partial refund	Custom amount › confirm (5–10 days)

12 Courses (LMS) & Reputation

Host online courses and automate review collection campaigns

Courses — LMS structure

Course	Top-level container: title, description, cover image
Module	Chapter or section that groups related lessons
Lesson	Unit: video URL + rich text content + duration
Access	Free or gated to a Stripe product purchase
Progress	% completion tracked per enrolled student

Creating a course

1. Go to Courses › click "New Course"
2. Enter course title and description
3. Add modules (sections) with the "+" button
4. Inside each module, add lessons
5. Per lesson: paste video URL, write description
6. Optionally link to a paid product for access control
7. Toggle "Published" to make the course live

Enrollment view

Go to Courses › "Enrollments" tab.
See each student's progress (% completed).
Filter by course, student name, or enrollment date.

Reputation — collecting reviews

1. Go to Reputation › click "New Request"
2. Search and select a contact
3. Choose the review platform (Google, Facebook...)
4. Click "Send" — email sent via Resend
5. Track status: Sent › Opened › Review completed

Supported review platforms

Google · Facebook · Trustpilot · Yelp · TripAdvisor · Custom

Reputation dashboard metrics

Metric	Description
Average rating	Stars out of 5 + distribution bar chart
Total reviews	Reviews received across all platforms
Requests sent	Total review request emails dispatched
Open rate	% of request emails opened by clients
Response / Review rate	% of clients who completed a review

Automate review collection

Create a workflow with trigger "Payment received"
or "Deal won" › action "Request review".
Reviews collect on autopilot — zero manual effort.

13 Analytics & Reports

Measure revenue, conversion rates, channel performance and pipeline health

Key metrics tracked

Metric	What it measures	Periods
Revenue ($)	Total collected in period	7d/30d/90d/12m
New contacts	Contacts added in period	7d/30d/90d/12m
Conversion rate	Leads › clients (%)	7d/30d/90d/12m
Deals won	Closed deals in period	7d/30d/90d/12m
Avg response time	Time to first reply	7d/30d/90d/12m

Top contacts table

Column	Shows
Contact	Name and company
Total deals	Number of opportunities linked to this contact
Total value	Sum of all deal values ($)
Last activity	Most recent interaction timestamp
Status	Colour dot: active / at-risk / inactive

Available charts

Chart	Type	Data visualised
Revenue trend	Line	Monthly actuals vs target
Pipeline distribution	Bar	Deals per pipeline stage
Channel breakdown	Donut	Email vs SMS activity
Activity heatmap	Area	Conversations per day of week

Recent conversions table

Column	Shows
Contact	Converted lead name and avatar
Deal value	Won deal amount ($)
Date	When the deal was marked as Won
Source channel	Channel that originated the lead

Changing the time period

Last 7 days · Last 30 days · Last 90 days · Last 12 months

Exporting data

1. Go to Analytics › click "Export" (top right)
2. A CSV file is generated with the displayed data
3. The active time period is applied to the export

Trend indicators

+ Green = improvement vs previous period.
- Red = decline vs previous period.
› Grey = stable (‹ 1% change).
Hover over any KPI card to see exact percentage.

14 Settings & Administration

Configure workspace, channels, billing, integrations, and white-label

Settings sections overview

Section	Route	What to configure
General	/settings/general	Name, logo, site, timezone, language, date format
Team & Roles	/settings/team	Invite members, change roles, deactivate accounts
Channels	/settings/channels	Email and SMS (admins only)
White-Label	/settings/white-label	Brand name, logo, colors, custom domain
Integrations	/settings/integrations	Stripe · Google Calendar · Zapier · Make · Notion
Billing	/settings/billing	Plan, usage (incl. emails this month), invoices

General settings — field reference

Organisation name	Your brand name (shown in the header)
Logo	PNG or SVG, max 2 MB
Website URL	https://your-website.com
Timezone	America/New_York · Europe/Paris · etc.
Language	English · French
Date format	MM/dd/yyyy · dd/MM/yyyy · yyyy-MM-dd

White-label customisation

Option	What it changes
Brand name	Replaces "VODOO CRM" with your own name
Logo	Your logo instead of the VODOO CRM logo
Favicon	Browser tab icon for your workspace
Primary colour (HEX)	Replaces the violet accent throughout the UI
Custom domain	crm.your-company.com — via CNAME DNS record
Sender name	Your brand name shown as the email sender

Subscription plans

Plan	Price	Contacts	Members	Emails / mo
Basic	$29 / mo	500	3	2,000
Standard	$69 / mo	5,000	10	10,000
Pro	$129 / mo	Unlimited	Unlimited	50,000
Agency	$249 / mo	Unlimited	Unlimited	100,000

Configuring your channels

1. Email: Settings › Channels › Email › set the sender name
2. Your reply address is created automatically (read-only)
3. Optional: forward a copy of replies to your usual mailbox
4. SMS: enter your Twilio Account SID, Auth Token and number
5. Paste the webhook URL shown into your Twilio number settings

15 Roles & Permissions

9 predefined roles — who can access which modules in VODOO CRM

Role definitions

Role	Scope	Special rights
Owner	ALL modules	Billing, org deletion, full admin
Administrator	ALL modules	Team, settings, channel config
Closer	Dashboard · Contacts · Pipeline · Conversations · Calendar · Tasks	Sales focus — no admin access
Community Manager	Dashboard · Contacts · Conversations · Reputation	Social & review management
Editor	Dashboard · Funnels · Courses · Tasks	Content creation only
Marketer	Dashboard · Funnels · Analytics · Workflows · Contacts · Reputation	Full marketing access
Designer	Dashboard · Funnels · Courses	Page design only
Project Manager	Dashboard · Tasks · Contacts · Workflows · Calendar · Pipeline	Team coordination
Virtual Assistant	Dashboard · Contacts · Conversations · Tasks · Calendar	Admin support tasks
Member / Accountant	Dashboard · Analytics · Sales	Read-only access

Module access matrix (Yes = full access · — = no access · every role sees the Dashboard)

Module	Owner	Admin	Closer	C.Mgr	Marketer	P.Mgr	Assist.	Member
Contacts	Yes	Yes	Yes	Yes	Yes	Yes	Yes	—
Pipeline	Yes	Yes	Yes	—	—	Yes	—	—
Conversations	Yes	Yes	Yes	Yes	—	—	Yes	—
Workflows	Yes	Yes	—	—	Yes	Yes	—	—
Analytics	Yes	Yes	—	—	Yes	—	—	Yes
Funnels	Yes	Yes	—	—	Yes	—	—	—
Calendar	Yes	Yes	Yes	—	—	Yes	Yes	—
Sales	Yes	Yes	—	—	—	—	—	Yes
Courses	Yes	Yes	—	—	—	—	—	—
Reputation	Yes	Yes	—	Yes	Yes	—	—	—
Settings	Yes	Yes	—	—	—	—	—	—

16 Tips, Shortcuts & Troubleshooting

Keyboard shortcuts

Shortcut	Action
Cmd / Ctrl + K	Open command palette (global search)
Tab	Move to next field in a form
Enter	Submit form or send a message
Escape	Close a modal or dialog
Cmd/Ctrl + Enter	Save and close a form quickly

Best practices — Contacts

1. Always fill in email OR phone as a minimum
2. Apply tags consistently to enable segmentation
3. Record the source to track acquisition channels
4. Import via CSV rather than creating contacts one by one
5. Add a note after every important interaction

Best practices — Workflows

1. Start simple: 1 trigger + 2–3 actions maximum
2. Always add a delay before a follow-up message
3. Test every workflow with a dummy contact first
4. Monitor execution logs weekly for failures

Common errors & solutions

Error message	Solution
"Email already in use"	Log in or use password reset
"Required field missing"	Fill in the field marked with *
"Invalid email format"	Check syntax: name@domain.ext
"Permission denied"	Ask your admin to elevate your role
"Number not found in your account"	Use a Twilio number you own, in +33... format
"Monthly email quota reached"	Upgrade your plan or wait for next month
"Invalid webhook URL"	Ensure URL starts with https://

Quick index — where to find what

I want to...	Go to...
Add a contact	Contacts › 'New Contact'
Import a CSV file	Contacts › 'Import'
Create a deal	Pipeline › '+' on a column
Send a message	Conversations › select › type
Send a campaign	Broadcasts › 'New campaign'
Create an automation	Workflows › 'New Workflow'
Share my booking link	Calendar › Settings › copy URL
Create a landing page	Funnels › 'New Funnel'
Invite a colleague	Settings › Team › 'Invite'

Contact support
Email: contact@vodoocrm.com
Report a bug: button at the bottom-right of the app.
Documentation: vodoocrm.com