■ VODOO CRM

COMPLETE USER GUIDE

Getting started, features and best practices — 2026 Edition

Contacts & Pipeline

Multi-channel Messaging

Workflow Automation

Analytics

TABLE OF CONTENTS

01 LOGIN & ONBOARDING

Create your account and set up your VODOO workspace

1. Go to vodoo.app → click 'Sign Up'
2. Enter: First name, Last name, Email, Password
3. Enter your company name
4. Accept terms & conditions → 'Create my account'
5. Check your email (confirmation link)

Step	Page	Fields / Actions
① Welcome	/onboarding	Overview of 3 pillars · "Get started" button
② Organization	/onboarding/org	Brand name · Website · Industry (9 options)
③ Channel	/onboarding/channel	Choose first channel · Enter credentials
④ Done	Final screen	Congratulations · "Go to Dashboard"

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

1. Email + Password → 'Sign In'
2. OR: Google button (1-click OAuth login)
3. OR: Magic Link sent by email

1-click sign-in with your Google account.
Secure OAuth authentication — no password to remember.

Forgot your password?
Click "Forgot password?" → reset email (valid for 1h).

02 DASHBOARD

Real-time overview of your business activity

KPI	Icon	Description	Trend
Total Contacts	■	Total number of contacts in your CRM	↑ +12% this month (ex.)
Active Conversations	■	Open threads across all channels	↓ -3 today
Monthly Revenue	■	Revenue collected this month ($)	↑ +8% vs last month
Conversion Rate	■	% leads converted to clients in period	→ Stable ~24%

Widget	Position	Data displayed	Quick link
Revenue Chart	Center	Monthly curve: actual vs target	—
Recent Deals	Bottom left 2/3	Contact · Company · Stage · Value	→ /pipeline
Today's Events	Bottom right 1/3	Time · Title · Status (color badge)	→ /calendar
Recent Activity	Bottom right 1/3	Icon · Description · Time elapsed	—

Icon	Module	Primary use
■	**Dashboard**	Daily overview
■	**Contacts**	Client database
■	**Pipeline**	Kanban sales tracking
■	**Conversations**	Multi-channel inbox
■■	**Workflows**	Marketing automations
■	**Analytics**	Reports and dashboards
■	**Funnels**	Lead capture pages
■	**Calendar**	Appointments & availability
■	**Sales**	Products, orders, payments
■	**Reputation**	Reviews & testimonial requests
■	**Courses**	LMS — online learning
■	**Tasks**	Team to-do list
■■	**Settings**	Workspace configuration

1. "New Contact" button (top right) → form
2. "View all" recent deals → redirects /pipeline
3. Click a deal → contact detail view
4. Click an event → day calendar view

■ **Click the ← arrow at the bottom left to collapse.**
Collapsed mode: icons only + tooltips on hover.
On mobile: hamburger menu ≡ at top left.

■ **Dashboard auto-refreshed (Supabase Realtime).**
Dynamic greeting based on time: Good morning / evening ■

Indicator	Meaning
↑ **Green**	Improvement vs previous period
↓ **Red**	Decline vs previous period
→ **Grey**	Stable (variation < 1%)

03 CONTACT MANAGEMENT

Create, search, import and manage your client database

Field	Req.	Type	Example / Notes
First Name	*	Text	Ex: John
Last Name	*	Text	Ex: Smith
Email		Email	john@example.com
Phone		Phone	+1 555 123 4567
Company		Text	Company name
Source		List	Funnel · WhatsApp · Email · Instagram · Manual · Import
Tags		Multi-sel.	VIP · Client · Hot Lead · Prospect · Partner

1. Click 'Import' at the top of the Contacts page
2. Download the provided CSV template ("CSV Template" button)
3. Fill columns: First Name, Last Name, Email, Phone, Company, Source
4. Drag and drop the file into the upload area
5. Check the preview → Click "Import"

■ **UTF-8 CSV · comma or semicolon separator.**
Limit: 1,000 contacts/import (Starter plan).

1. Click 'Export' → downloads contacts_[date].csv
2. Columns: First Name, Last Name, Email, Phone, Company, Source, Tags, Created at

Funnel · WhatsApp · Instagram · Email · Facebook · SMS · Manual

■ **Real-time search (350ms delay): name, email, company.**
Multi-select Source filter. Live contact counter.

Column	Description
Avatar	Initials or photo · random background color
Full Name	First Last (or email if missing)
Email · Phone	Clickable (email client / phone call)
Source · Tags	Colored badges by origin and segmentation
Last Activity	Timestamp of last interaction
Actions ■	View · Edit · Delete · Note · Message

Tab	Content
General	Basic info · inline-editable fields
Deals	Opportunities: name · value · stage · assigned to
Messages	Conversation history by channel (WhatsApp, Email…)
Tasks	Tasks linked to this contact
Orders	Purchase history and Stripe transactions

■■ **Soft delete (GDPR): contacts are archived, never erased.**

04 SALES PIPELINE & DEALS

Manage your sales opportunities with drag & drop Kanban view

Stage	Color	Meaning	Available actions
New Lead	■ Grey	Incoming unqualified lead	View · Edit · Move
Qualified	■ Blue	Confirmed lead, need identified	View · Edit · Move
Call Booked	■ Amber	Discovery meeting scheduled	View · Edit · Move
Proposal Sent	■ Violet	Commercial offer submitted	View · Edit · Move
Negotiation	■ Orange	Discussing terms & conditions	View · Edit · Move
Won ✓	■ Green	Deal closed — lead converted	Dedicated "Won" button
Lost ✗	■ Red	Opportunity lost	"Lost" button + reason

1. '+' button on a column OR 'New Deal'
2. Search the contact (autocomplete)
3. Enter value, stage, assignee, probability
4. Confirm → card appears on the kanban board

Field	Req	Type	Description / Example
Contact	*	Search	Autocomplete from CRM base
Value		Number	Potential amount ($)
Stage	*	List	Select pipeline stage
Assigned to		List	Responsible team member
Probability		Slider	0–100% closing score
Tags		Multi-sel.	VIP · Hot Lead · Urgent · Cold

Active Won Lost Abandoned

1. Go to 'Pipeline' → select the pipeline
2. Drag and drop a card to change its stage
3. Click a card → view / edit the deal
4. Menu ■: Edit · Won · Lost · Delete

Action	How to
Create pipeline	Left sidebar → '+' icon next to 'Pipelines'
Rename	Right-click on pipeline → "Rename"
Add a stage	Pipeline settings → "Add stage" → name + color
Reorder stages	Drag & drop columns on the board
Mark Won	Dedicated button on card or in edit view
Mark Lost	"Lost" button → enter the loss reason

Score	Color badge	Priority
≥ 70%	■ Green	High — close as priority
50–69%	■ Amber	Medium
30–49%	■ Orange	Low
< 30%	■ Red	Very low — follow-up needed

■ **List view available via icons at the top right.**
Sort by value, date, stage or assigned.

05 ■ CONVERSATIONS & MESSAGING

Unified multi-channel inbox — WhatsApp, Email, SMS, Instagram, Messenger

Channel	Icon	Color	Requirements
WhatsApp	■	■ Green	WhatsApp Business account + Meta Business API
Instagram DM	■	■ Pink	Instagram Pro account + Meta App
Facebook Messenger	■	■ Blue	Facebook Page + linked Meta App
Email	■	■ Indigo	Resend account + verified email domain
SMS	■	■ Amber	Twilio account + purchased number

1. Click a conversation in the left list
2. Read the history in the center panel
3. Type in the input box at the bottom
4. ■ for emoji · ■ for file/image
5. Send button OR press Enter

Category	Sample message
Welcome	"Hello, how can I help you?"
Greeting	"Welcome! What can I assist you with?"
Follow-up	"Following up on our previous conversation…"
Confirmation	"I confirm our appointment."
Sales	"Please find our proposal attached."
Closing	"Thank you, feel free to reach out anytime!"

✓ Sent ✓✓ Delivered ✓✓ Read ✗ Failed

Element	Description
Avatar + Name	Contact initials + company
Message preview	Extract of the last message exchanged
Timestamp	"5 min ago" · "Yesterday" · "Mon." · or date
Unread badge	Violet bubble with counter
Channel icon	WhatsApp / Email / SMS / Instagram / Messenger
Status badge	Open (green) · Snoozed (yellow) · Closed (grey)

Action	How to
Filter by channel	Click tab: WhatsApp / Email / SMS / All
Assign	Top menu → select a team member
Change status	Dropdown → Open / Snoozed / Closed
Snooze	Suspend until a defined time
Mark resolved	✓ icon at top of conversation panel
Search	Search bar: contact name or email

■ **Unified inbox: all your channels (WhatsApp, Email, SMS,** Instagram, Messenger) in the same interface.

06 WORKFLOWS & AUTOMATION

Build automatic sequences for contacts and sales

Trigger	Fires when…	Action	Key parameters
Form submitted	A visitor fills out a funnel form	**Send WhatsApp**	Message body · Variables {{contact.name}}
Payment received	A Stripe order is confirmed	**Send Email**	Subject · HTML body · Recipient
Appointment booked	A calendar meeting is scheduled	**Send SMS**	SMS content (160 chars max)
Contact created	A new contact is added to the CRM	**Delay / Wait**	Duration + Unit (min · h · d · weeks)
Tag added	A specific tag is applied to a contact	**Add / Remove Tag**	Select the target tag
Pipeline stage	A deal changes stage in the pipeline	**Change deal stage**	Pipeline + target stage
Manual	Triggered manually by a team member	**Create task**	Title · Date · Assignee · Priority
Webhook received	Incoming HTTP call from an external service	**Send Webhook**	URL · Method · JSON body

1. 'Workflows' menu → 'New Workflow'
2. Enter name and description
3. Choose the trigger from the list
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 panel
7. Click 'Save' then toggle the ON/OFF switch

Variable	Value inserted
{{contact.name}}	Contact's first + last name
{{contact.email}}	Contact's email address
{{contact.phone}}	Phone number
{{contact.company}}	Company name

Action	How to
Enable / Disable	ON/OFF toggle on list or in editor
Duplicate	Menu ■ → 'Duplicate' → full copy
Edit	Click 'Edit' → opens ReactFlow visual editor
Delete	Menu ■ → 'Delete' (confirmation required)
Test	'Test' button → simulate with a test contact

■ **1. Start simple: 1 trigger + 2-3 actions max to begin.**
2. Always add a delay before follow-up (min. 24h recommended).
3. Test with a dummy contact before going live.
4. Monitor execution logs to catch failures.

WhatsApp | Email | SMS | Delay | Tag+

Tag- | Stage | Task | Webhook | Review

07 CALENDAR & TASKS

Manage appointments, availability and team task list

Feature	Description
Monthly view	Month grid with indicators on each day
Navigation	← → arrows + "Today" button
Create event	Click on a date → creation form
View events	Click date → day's list displayed
Edit	Click event → modify the details
Delete	Menu ■ on event → "Delete"

Field	Req	Type	Description / Example
Title	*	Text	Ex: Discovery call with Mary
Date	*	Date	Select from calendar
Start time	*	Time	HH:MM format
End time	*	Time	HH:MM format
Contact		Search	Link to a CRM contact (optional)
Location		Text	Address or video conference link
Status		List	Scheduled · Confirmed · Completed · Cancelled

Scheduled Confirmed Completed ✓ Cancelled No-show

■ **Public URL: vodoo.app/book/your-slug**
Go to Calendar → "Settings" → "Booking link".
Copy and share via email, WhatsApp or on your website.

1. Go to Calendar → 'Settings'
2. Set availability by day of week
3. Meeting duration (e.g. 30 min, 1h)
4. Buffer between meetings (e.g. 15 min)
5. Timezone (default: America/New_York)
6. Enable/disable public booking

Tab	Content shown
All	All tasks across the organization
My Tasks	Tasks assigned to you only
Completed	Tasks marked as done
Overdue	Tasks past their due date

Field	Req	Type	Description / Example
Title	*	Text	Ex: Call John Smith for follow-up
Priority		Radio	High ■ · Medium ■ · Low ■
Due date		Date	When the task should be done
Contact		Search	Link to a contact (optional)
Assigned to		List	Responsible team member

■ **Check ■ to the left of the title to complete a task.**
Automatically moves to the "Completed" tab.

08 FUNNELS & FORMS

Create lead capture pages with integrated forms

A sequence of web pages hosted on VODOO.
Captures leads via forms → auto-creates CRM contacts.
URL: vodoo.app/f/[your-slug]/[page-slug]

1. Go to 'Funnels' → 'New Funnel'
2. Enter a name and a slug (URL identifier)
3. Optional: add a custom domain
4. Click "Create"
5. Add pages to the funnel ('+' button)
6. Edit each page in the visual editor
7. Configure the form fields
8. Publish via the "Published" toggle

Metric	Description
Views	Total number of visits to the pages
Submissions	Forms filled and submitted
Conv. rate	Submissions ÷ Views × 100
Contacts created	New contacts generated

Action	How to
Edit	Click 'Edit' → opens the page editor
Preview	'View' button → opens in new tab
Duplicate	Menu ■ → 'Duplicate' → full copy
Copy link	Menu ■ → 'Copy link' → clipboard
Publish	Toggle Published/Draft status on card
Delete	Menu ■ → 'Delete' (irreversible)

1. Click "Edit" on a funnel page
2. Drag & drop blocks from the left panel
3. Click a block → edit text, image, color
4. Configure form: add/remove fields
5. Save → back to funnel page list

Data	Source
Visitor IP	Visitor's network
Source URL	Referring web page (referrer)
utm_source	Campaign URL parameter
utm_campaign	Marketing campaign name
Submission date	Automatic timestamp

Each submission creates a CRM contact if email is unknown.
Triggers "Form submitted" workflow if configured.

09 SALES & ORDERS

Create products, manage orders and collect payments via Stripe

Field	Req	Type	Description / Example
Name	*	Text	Ex: Digital Marketing Course
Description		Textarea	Offer details
Price ($)	*	Number	Amount in dollars
Price type	*	List	One-time payment / Recurring subscription
Status		Toggle	Active / Inactive

Pending · Paid · Part. paid · Refunded · Cancelled

Column	Information
Contact	Client's name + avatar
Products	List of ordered items
Total amount	Order total ($)
Status	Colored badge by payment state
Date	Order timestamp
Actions	View · Refund · Download invoice

1. Client accesses the page or payment link
2. Redirected to secure Stripe Checkout
3. Card input (data processed by Stripe, not VODOO)
4. Confirmation → webhook → order auto-created
5. Confirmation email sent (via Resend)
6. "Payment received" workflow triggered if configured

Type	Description	Handling
One-time	Single charge	Standard order
Monthly	Charged every month	Stripe Subscriptions
Annual	Charged yearly	Stripe Subscriptions

VODOO NEVER stores credit card data.
Payments via Stripe (PCI DSS Level 1 certified).
3D Secure compliance for European payments (SCA).

Clients can manage their subscriptions,
download invoices and update payment methods.
Link accessible from their account or by email.

10 ■ COURSES (LMS) & REPUTATION

Create online courses and manage customer reviews

1. Go to 'Courses' → 'New Course'
2. Course title + description
3. Add modules (sections) with '+'
4. In each module, add lessons
5. Lesson: title + video URL + text content
6. Link access to a paid product (optional)
7. Publish the course → toggle on

LMS Element	Description
Course	Main container (title, description, cover)
Module	Chapter/section grouping lessons
Lesson	Unit: video URL + text + duration
Access	Free or gated to a Stripe product
Progress	Student advancement tracking (% completed)

■ **Enrollment view: students · progress · completion date.**
Filter by course, student or enrollment date.

1. Go to 'Reputation' → 'New request'
2. Search and select a contact
3. Choose the platform (Google, Facebook…)
4. Click "Send" → email sent via Resend
5. Track: Sent → Opened → Completed

Google · Facebook · Trustpilot · Yelp · TripAdvisor · Other

Indicator	Description
Average rating	Stars /5 + distribution chart
Total reviews	Number of reviews received (all platforms)
Requests sent	Total review requests sent by email
Open rate	% requests opened by clients
Response rate	% clients who left a review

■■**Automate: "Send review request" workflow triggered**
after payment received or deal won. Zero manual effort.

11 ANALYTICS & REPORTS

Analyze commercial and marketing performance

KPI	Icon	Description	Available period
Revenue	■	Total revenue in the period ($)	7d · 30d · 90d · 12m
New contacts	■	Contacts created in the period	7d · 30d · 90d · 12m
Conversion rate	■	Leads converted to clients (%)	7d · 30d · 90d · 12m
Deals won	■	Number of closed deals	7d · 30d · 90d · 12m
Response rate	■	Conversations with a reply (%)	7d · 30d · 90d · 12m

Chart	Type	Data
Revenue Trend	Line	Actual vs monthly target
Pipeline Distribution	Bars	Deals per stage
Channels	Pie	Messages per channel
Activity Heatmap	Area	Conversations per day

1. Click 'Export' at the top of the Analytics page
2. Choose: PDF (visual report) or CSV (raw data)
3. Active period is exported → auto download

Last 7 days | 30 days | 90 days | 12 months

Top Contacts — columns	Description
Contact · Company	Contact identity
# deals · Total value	Commercial performance
Last activity	Last exchange timestamp
Status	Color dot by activity level

Recent conversions — columns	Description
Contact · Avatar	Converted contact name
Deal value	Won deal amount ($)
Date	When the conversion occurred
Channel · Type	Source channel + conversion type

■ **KPI trends: ↑ Green = improvement · ↓ Red = decline · → Grey = stable.**
Main dashboard auto-refreshed via Supabase Realtime.

12 SETTINGS & ADMINISTRATION

Configure your workspace, channels, billing and white-label

Section	Route	What to configure
General	/settings/general	Org name · Logo · Website · Timezone · Language · Date format
Team & Roles	/settings/team	Invite members · Change roles · Deactivate accounts
Channels	/settings/channels	WhatsApp · Email · SMS · Instagram · Messenger · Webhook
White-Label	/settings/white-label	Brand · Logo · Colors · Custom domain · Favicon
Integrations	/settings/integrations	Stripe · Zapier · Make · API Keys · Outgoing webhooks
Billing	/settings/billing	Current plan · Usage · Payment method · Invoice history

Field	Req	Type	Description / Example
Organization name	*	Text	Your brand name
Logo		Upload	PNG/SVG max 2 MB
Website		URL	https://your-site.com
Timezone		List	America/New_York · London · Paris…
Interface language		List	EN · FR · ES · PT · AR
Date format		List	MM/dd/yyyy · dd/MM/yyyy…

1. Settings → 'Team & Roles'
2. Click 'Invite a member'
3. Enter email + choose role
4. Click 'Send invitation'
5. The person receives an email with an access link

1. Settings → 'Channels' → click the channel
2. Enter credentials (API keys, tokens)
3. Click 'Test connection' → ✓
4. Save → status "Connected"

Option	Description
Brand name	Replace "VODOO CRM" with your own name
Logo	Your logo instead of the VODOO logo
Favicon	Browser tab icon
Primary color	HEX code of your brand color
Custom domain	crm.your-company.com via CNAME DNS
Custom email	Emails sent from your own domain

Plan	Price	Contacts	Members
Starter	$49/mo	1,000	5
Pro ■	$149/mo	Unlimited	Unlimited
Agency	$299/mo	Unlimited	Unlimited
Enterprise	Custom	Unlimited	Unlimited

■ **Upgrade: immediate.**
Downgrade: effective at end of current billing period.
Access via Settings → Billing → "Change plan".

13 ■ ROLES & PERMISSIONS

Who can do what in VODOO CRM — 9 predefined roles

Role	Color	Accessible modules	Special rights
Owner	■	ALL modules	Billing · Org deletion · Full admin
Administrator	■	ALL modules	Team · Settings · Channels
Closer	■	Dashboard · Contacts · Pipeline · Conversations · Calendar · Tasks	Sales focus
Community Manager	■	Dashboard · Contacts · Conversations · Reputation	Social & reviews
Editor	■	Dashboard · Funnels · Courses · Tasks	Content creation
Marketer	■	Dashboard · Funnels · Analytics · Workflows · Contacts · Reputation	Mktg automation
Designer	■	Dashboard · Funnels · Courses	Page design
Project Manager	■	Dashboard · Tasks · Contacts · Workflows · Calendar · Pipeline	Coordination
Virtual Assistant	■	Dashboard · Contacts · Conversations · Tasks · Calendar	Admin support
Member / Accountant	■	Dashboard · Analytics · Sales	Read only

ACCESS MATRIX BY MODULE (✓ = Access · — = No access)

Module	Owner	Admin	Closer	Comm.Mgr	Marketer	Proj.Mgr	Assist.	Member
Dashboard	✓	✓	✓	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓	✓	✓	—
Pipeline	✓	✓	✓	—	—	✓	—	—
Conversations	✓	✓	✓	✓	—	—	✓	—
Workflows	✓	✓	—	—	✓	✓	—	—
Analytics	✓	✓	—	—	✓	—	—	✓
Funnels	✓	✓	—	—	✓	—	—	—
Calendar	✓	✓	✓	—	—	✓	✓	—
Sales	✓	✓	—	—	—	—	—	✓
Courses	✓	✓	—	—	—	—	—	—
Reputation	✓	✓	—	✓	✓	—	—	—

Module	Owner	Admin	Closer	Comm.Mgr	Marketer	Proj.Mgr	Assist.	Member
Settings	✓	✓	—	—	—	—	—	—

14 BEST PRACTICES & SHORTCUTS

Use VODOO CRM optimally every day

Shortcut	Action
Cmd/Ctrl + K	Open command palette (global search)
Tab	Navigate between form fields
Enter	Submit form or send message
Esc	Close a modal or popover
↑↓	Navigate dropdown menus

1. Always fill in email OR phone (minimum)
2. Use tags to systematically segment contacts
3. Document the source to track acquisition
4. Import via CSV rather than creating manually
5. Add notes after each important interaction
6. Link a deal to every qualified contact
7. Export regularly (external backup)

Error message	Solution
"Email already in use"	Log in or reset your password
"Required field"	Fill in the field marked with * in red
"Invalid email format"	Check syntax: name@domain.ext
"No contact found"	Check spelling or create the contact
"Permission denied"	Contact admin to elevate your rights
"Contact limit reached"	Upgrade to Pro or clean up inactives
"Channel connection failed"	Check API keys in Settings → Channels
"Message send error"	Test channel connection in settings

■■**1. Start simple: 1 trigger + 2-3 actions max.**
2. Always a delay before follow-up (min. 24h).
3. Test with a dummy contact before production.
4. Use {{contact.name}} to personalize messages.
5. Monitor execution logs (failures).

15 GLOSSARY & QUICK INDEX

Key term definitions and where to find each feature

Term	Definition
CRM	Customer Relationship Management — managing client relationships
Contact	Person (lead/client) recorded in your CRM
Deal / Opportunity	Sales opportunity linked to a contact in the pipeline
Pipeline	Visual representation of sales in columns (Kanban)
Stage	Pipeline phase (Qualified, Proposal Sent…)
Lead	Potentially interested contact, not yet a client
Conversion	Turning a lead into a client (deal won)
Workflow	Sequence of auto actions triggered by an event
Trigger	Event that starts a workflow automatically
Tag	Colored label to segment contacts
Funnel	Sequence of web pages to capture leads
Webhook	HTTP notification sent to a third-party service
White-Label	Customization with your own branding
MRR	Monthly Recurring Revenue
Churn	Cancellation rate / client loss rate
LTV	Lifetime Value — total client value over time
RLS	Row-Level Security — data isolation per org

I want to…	Go to…
Add a contact	Contacts → 'New Contact'
Import CSV contacts	Contacts → 'Import'
Create a deal	Pipeline → '+' on a column
Send a message	Conversations → Contact → Message box
Create an automation	Workflows → 'New Workflow'
Set my availability	Calendar → 'Settings'
Share booking link	Calendar → Settings → Copy link
Create a landing page	Funnels → 'New Funnel'
View payments	Sales → 'Orders'
Request a review	Reputation → 'New request'
Invite a colleague	Settings → Team → 'Invite'
Change my plan	Settings → Billing → 'Change plan'
Analyze sales	Analytics (chart icon in sidebar)
Customize branding	Settings → White-Label
Create a course	Courses → 'New Course'
Reset password	/login → "Forgot password?"

Support: support@vodoo.app
Live chat: widget at the bottom right of the interface.
Docs: docs.vodoo.app | Tutorials: academy.vodoo.app