VODOO CRM

COMPLETE USER GUIDE

Getting started, features and best practices — Version 2, September 2026

Contacts & Pipeline	Email & SMS Inbox	Workflow Automation	Analytics

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01 LOGIN & ONBOARDING

Create your account and set up your VODOO CRM workspace

CREATE AN ACCOUNT

1. Go to vodoocrm.com → 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)

LOG IN

1. Email + Password → 'Sign In'
2. Enter the 6-digit code received by email
3. OR: Google button (1-click OAuth login)

Forgot your password?
Click "Forgot password?" → reset link sent by email.

ONBOARDING — 4 STEPS (~3 min)

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 your main channel: Email or SMS
④ Done	Final screen	Congratulations · "Go to Dashboard"

INDUSTRY SECTORS

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

GOOGLE LOGIN (SSO)

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

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 email and SMS threads	↓ -3 today
Monthly Revenue	●	Revenue collected this month ($)	↑ +8% vs last month
Conversion Rate	●	% leads converted to clients in period	→ Stable ~24%

SIDEBAR NAVIGATION

Icon	Module	Primary use
●	**Dashboard**	Daily overview
●	**Contacts**	Client database
●	**Pipeline**	Kanban sales tracking
●	**Conversations**	Email & SMS inbox
●	**Broadcasts**	Email & SMS campaigns
●	**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

QUICK ACTIONS

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

COLLAPSIBLE SIDEBAR

Click the ← arrow at the bottom left to collapse.

Collapsed mode: icons only + tooltips on hover.

On mobile: hamburger menu ≡ at top left.

REAL-TIME DATA

Dashboard auto-refreshed (Supabase Realtime).

Dynamic greeting based on time: Good morning / evening

KPI TRENDS

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 · Email · SMS · Booking · Manual · Import
Tags		Multi-sel.	VIP · Client · Hot Lead · Prospect · Partner
Consent		Status	Unsubscribed from email / SMS, with the date

IMPORT CONTACTS (CSV)

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.
Up to 1,000 contacts per CSV import.

EXPORT

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

AVAILABLE SOURCES

Funnel · Email · SMS · Booking · Manual · Import

SEARCH & FILTERS

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

DETAIL VIEW — 5 TABS

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

Consent: STOP by text, one-click email unsubscribe,
or set by hand on the contact record.

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

CREATE A DEAL

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

DEAL FORM FIELDS

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

DEAL STATUSES

Active · Won · Lost · Abandoned

USING THE KANBAN BOARD

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

MANAGING PIPELINES

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

05 CONVERSATIONS — EMAIL & SMS

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

Channel	Sent from	Replies	What you need
Email	VODOO CRM, in your organization's name	Arrive in this inbox automatically	Nothing — a reply address is created for you
SMS	Your own Twilio account and number	Arrive in this inbox automatically	Your Twilio account + a number you own

SEND A MESSAGE

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. Email: subject taken from the last email ("Re: …")
5. Send button OR press Enter

MESSAGE STATUSES

Status	Meaning
Queued	Accepted by VODOO CRM, being sent
Sent	Accepted by the provider (Resend or Twilio)
Delivered	Reached the recipient
Not sent	Refused — the reason is shown under the message

A contact who replied STOP cannot be texted again.
START re-subscribes them.

CONVERSATION LIST

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	Email or SMS

CONVERSATION ACTIONS

Action	How to
Filter by channel	Tabs: Email / SMS / All
Filter by status	Tabs: Open / Snoozed / Closed
Assign	Top menu → select a team member
Snooze / Close	Put aside for later, or mark as resolved
Search	Search bar: contact name or email

Email replies arrive without the quoted previous message.
Optional: forward a copy to your usual mailbox (Settings → Channels).

06 EMAIL & SMS CAMPAIGNS

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

	Email campaign	SMS campaign
Sent from	VODOO CRM, in your organization's name	Your Twilio account and number
Unsubscribe	One-click link added automatically	"STOP" mention added if missing
Sending hours	Any time	Monday–Saturday, 8 am – 8 pm (your time zone)
Tracking	Delivered · opened · clicked	Delivered · failed

CREATE A CAMPAIGN

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

Unsubscribed contacts are checked again at sending time.

WHO RECEIVES IT

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

MONTHLY EMAIL QUOTA

Trial	Basic	Standard	Pro	Agency
500	2,000	10,000	50,000	100,000

Counts campaign, workflow and one-to-one emails; usage
in Settings → Billing. Texts are billed by your Twilio account.

07 WORKFLOWS & AUTOMATION

Build automatic sequences — including automatic replies

Trigger	Fires when…	Action	Key parameters
Form submitted	A funnel form is filled (any, or a chosen one)	**Send Email**	Subject · Body · Unsubscribe link added
Message received	A contact emails or texts you	**Send SMS**	Text sent from your Twilio number
Payment received	A Stripe order is confirmed	**Condition (If/Else)**	Yes / No branch, e.g. "has tag VIP"
Appointment booked	A calendar meeting is scheduled	**Enroll in workflow**	Start another workflow
Contact created	A new contact is added to the CRM	**Delay / Wait**	Duration + Unit (min · h · d)
Tag added	A tag is applied (any, or a chosen one)	**Add / Remove Tag**	Select the target tag
Pipeline stage	A deal changes stage (any, or a chosen one)	**Change deal stage**	Pipeline + target stage
Manual	Triggered by a team member	**Task · Webhook · Review**	Create a task, call a URL, ask for a review

CREATE A WORKFLOW — STEPS

1. 'Workflows' menu → 'New Workflow'
2. Enter name and description
3. Choose the trigger (and the tag, stage, form or channel)
4. The visual editor opens with the trigger node
5. Click '+' to add actions and conditions
6. Click 'Save' then toggle the ON/OFF switch

VARIABLES IN MESSAGES

Variable	Value inserted
{{first_name}}	Contact's first name
{{contact.full_name}}	First + last name
{{contact.email}} · {{contact.phone}}	Email · phone number
{{org.name}}	Your organization name
{{message.subject}}	Subject of the email received

AUTOMATIC REPLIES — SAFEGUARDS

A "Message received" workflow never answers an out-of-office
or other automatic reply, nor a STOP / START text.
It runs at most once every 24 hours per contact.

MANAGE WORKFLOWS

Action	How to
Enable / Disable	ON/OFF toggle on list or in editor
Duplicate	Menu → 'Duplicate' → full copy
Execution history	Each run with its step-by-step log
Delete	Menu → 'Delete' (confirmation required)

Unsubscribed contacts are skipped: the step is logged
"skipped" with the reason.

08 CALENDAR & TASKS

Manage appointments, availability and team task list

CALENDAR — FEATURES

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

EVENT FORM FIELDS

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

EVENT STATUSES

Scheduled · Confirmed · Completed ✓ · Cancelled · No-show

PUBLIC BOOKING LINK

Public URL: vodoocrm.com/book/your-slug
Go to Calendar → "Settings" → "Booking link".
Copy and share it by email, SMS 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

TASKS MODULE

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

CREATE A TASK

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

09 FUNNELS & FORMS

Create lead capture pages with integrated forms

WHAT IS A FUNNEL?

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

CREATE A FUNNEL

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

FUNNEL STATISTICS

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

FUNNEL ACTIONS

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)

PAGE EDITOR

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

AUTOMATICALLY CAPTURED DATA

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.

10 SALES & ORDERS

Create products, manage orders and collect payments via Stripe

CREATE A PRODUCT

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

ORDER STATUSES

Pending · Paid · Part. paid · Refunded · Cancelled

ORDER TABLE COLUMNS

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

PAYMENT PROCESS (STRIPE)

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

PAYMENT TYPES

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

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

CLIENT BILLING PORTAL

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

11 COURSES (LMS) & REPUTATION

Create online courses and manage customer reviews

COURSES MODULE

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.

REPUTATION & REVIEWS MODULE

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

REVIEW PLATFORMS

Google Facebook Trustpilot Yelp

REPUTATION DASHBOARD

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.

12 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

AVAILABLE CHARTS

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

EXPORT DATA

1. Click 'Export' at the top of the Analytics page
2. A CSV file of the active period downloads automatically

CHANGE THE PERIOD

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

TOP CONTACTS & RECENT CONVERSIONS

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.

13 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	Email · SMS (administrators only)
White-Label	/settings/white-label	Brand · Logo · Colors · Custom domain · Favicon
Integrations	/settings/integrations	Stripe · Google Calendar · Zapier · Make · Notion
Billing	/settings/billing	Current plan · Usage incl. emails this month · Invoices

GENERAL SETTINGS

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	English · French
Date format		List	MM/dd/yyyy · dd/MM/yyyy…

CONFIGURE A CHANNEL

1. Email: set the sender name — reply address is automatic
2. Optional: forward a copy of replies to your mailbox
3. SMS: Twilio Account SID, Auth Token and your number
4. Paste the webhook URL shown into your Twilio number

WHITE-LABEL — CUSTOMIZATION

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

PLANS & BILLING

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

14 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 · every role sees the Dashboard)

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

15 BEST PRACTICES & SHORTCUTS

Use VODOO CRM optimally every day

KEYBOARD SHORTCUTS

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

CONTACT BEST PRACTICES

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)

COMMON ERROR MESSAGES & SOLUTIONS

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
"Number not found in your account"	Use a Twilio number you own (+1… format)
"Monthly email quota reached"	Upgrade your plan or wait for next month
Message "Not sent"	Read the reason shown under the message

OPTIMIZE WORKFLOWS

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 {{first_name}} to personalize messages.
5. Monitor execution logs (failures).

16 GLOSSARY & QUICK INDEX

Key term definitions and where to find each feature

GLOSSARY OF KEY TERMS

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
Campaign	One email or SMS sent to a targeted audience
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

QUICK INDEX — WHERE TO FIND WHAT

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
Send a campaign	Broadcasts → 'New campaign'
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: contact@vodoocrm.com
Report a bug: button at the bottom right of the app.
Website: vodoocrm.com