

Getting started with **VODOO CRM**

Every module, step by step: contacts, pipeline, email and SMS, campaigns, automations, payments and courses.

 Contacts**Your base** Pipeline**Your sales** Conversations**Email and SMS** Workflows**On autopilot**



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One chapter per page, in sidebar order.

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How to read this guide

Where · Plan · Roles

At the top of each chapter: where to find the module, the plans that include it and the roles that can use it.

“Standard and up”

The module is part of this plan and the higher ones.

Boxes

Violet: a tip. Yellow: a warning. Dashed: a detail.

Guide > Welcome

Welcome

What VODOO CRM is and how the interface is organized.

🌟 In a nutshell

VODOO CRM brings your contacts, sales, email and SMS conversations, campaigns and automations together in one place. Each entry in the sidebar matches a task in your sales day: you only see the ones your role and plan open up.

🗄️ The sidebar

🗄️	Dashboard	Your day at a glance
👤	Contacts	Your customer base
	Pipeline	Your deals on a board
📧	Conversations	Incoming email and SMS
📢	Broadcasts	Email and SMS campaigns
🔄	Workflows	Automations
	Analytics	Reports and trends
🌐	Funnels	Lead capture pages
📅	Calendar	Appointments and booking
🛒	Sales	Products, orders, payments
★	Reputation	Customer reviews
🎓	Courses	Online courses
☑️	Tasks	Follow-ups
⚙️	Settings	Organization, team, channels

🔍 The top bar

Search	⌘ K or Ctrl K: contacts, deals, conversations, pages.
Trial	The badge shows the trial days left.
Language	English or French, per member.
Theme	Light or dark.
Bell	Your notifications: deal won, task assigned, new booking...

🌟 Assistant and Feedback

On the right edge of every screen. **Assistant** answers your questions about using the CRM in seconds. **Feedback** is for reporting a problem or suggesting an improvement: the area concerned is detected automatically.

💡 Good to know

A module is missing? It depends on your role. A padlock means it belongs to a higher plan.

Guide > Set up your workspace



Set up your workspace

From sign-up to your first message, in about five minutes.



Time

About 5 minutes



Credit card

Not needed for the trial



Languages

Français · English



Create your account

- 1 **On vodoocrm.com, click "Create an account"**
Or "Sign up with Google" to go faster.
- 2 **Fill in your details**
Full name, company name (editable later), email, password of at least 8 characters.
- 3 **Click "Create my account"**
- 4 **Confirm your address**
Open the link we email you. Nothing there? Check your spam folder or resend it.



Sign in

- 1 **Email and password, then "Sign in"**
- 2 **Enter the 6-digit code**
It is emailed to you each time you sign in with a password.
- 3 **Or sign in with Google**
One click, no code.

📌 "Forgot password?" on the sign-in page emails you a link to choose a new one.



The setup assistant

- 1  **Welcome**
An overview of the steps, about 3 minutes.
- 2  **Your company**
Brand name shown to your customers, website, industry and currency.
- 3  **First channel**
Email (nothing to set up) or SMS (your Twilio account, to connect afterwards).
- 4  **Your team**
Invite up to 3 teammates, or go solo.
- 5  **Done**
Your two-week starter plan: import, automate, measure.

💡 Every step can be skipped and finished later from Settings.



Your trial

The free trial needs no credit card and opens the Standard plan features. The "Trial" badge at the top of the screen shows the days left; during the beta, it runs until January 31, 2027.

Guide > Dashboard



Dashboard

The first page after sign-in: your month's activity at a glance.

Where
Dashboard

Plan
All plans

Roles
Everyone — each sees their own modules

The figures

Card	What it shows	Compared with
Total Contacts	All your contacts	Growth since the 1st of the month
Active Conversations	Open email and SMS conversations	—
Deals won this month	Value of deals won since the 1st	Same date last month
Sales collected this month	Orders paid since the 1st	Same date last month
Conversion Rate	Deals won ÷ deals created	Same date last month

Revenue Trend

Your last 12 months: deals won and sales collected, with the change against the previous 12 months.

Recent Deals

The latest opportunities in your pipeline. A click opens the deal; "See all" opens the Pipeline.

Today's appointments

Today's appointments, cancelled ones excluded. A click opens them in the Calendar.

Recent Activity

Messages received, deals won and new contacts, newest first.

Depends on your role
Each role only sees the blocks of its own modules. With none, the page offers shortcuts to its areas.

Time zone
"Today" and the start of the month follow the organization's time zone (Settings > General).

Guide > Contacts



Contacts

Your customer base: every email, deal, order and task is attached to a contact.

Where
Contacts

Plan
All plans

Limit
From 500 to 50,000 contacts
depending on plan

+ Add a contact

- 1 Click "Add"
- 2 **First and last name are required**
Add the email, the phone in international format (+1...), the company and the source.
- 3 **"Create contact"**
An email already in your base is refused: "Open their record" takes you to the existing contact.

↑ Import a CSV file

- 1 **"Import", then drop your file**
HubSpot, Pipedrive, Salesforce and Zoho exports are recognized.
- 2 **Check the column mapping**
First name, last name, email, phone, company, source, tags.
- 3 **Preview, then "Import"**
Tick the consent box if these contacts agreed to your marketing messages.
- 4 **Read the result**
Created · Already there, completed · Rejected (rows to fix and re-import).

👤 The contact record

Contact info Details, source, creation date.
Tags Labels for your campaigns and workflows.
Activity Their interaction history.
Notes Your internal notes.
Deals · Orders · Tasks Everything related to them.

Start a workflow Create an order Add task

🔍 Find and export

Search By full name, email or company.
Filters By source and by tag.
Export Your whole base as CSV, in one click.
Consent "Mark unsubscribed" or "Resubscribe" on the record; an SMS STOP or the unsubscribe link apply on their own.

⚠️ Deleting

A deleted contact disappears from your lists at once. Their personal data, conversations and notes are permanently erased 30 days later; their deals and orders remain.

Guide > Pipeline

Pipeline

Your opportunities on a Kanban board, from first contact to signature.

Where
Pipeline

Plan
All (Basic: 1 pipeline)

Roles
Owner, Administrator, Closer

Standard template stages

New Lead Qualified Appointment Booked Proposal Sent Negotiation Won Lost

Rename them, change their colors, or start from an empty pipeline.

Create a deal

- 1 "New Deal", or "+ Add a deal" in a column
- 2 Pick the contact
An unknown name creates the contact at the same time.
- 3 Value, probability, owner, tags
The value is in the organization's currency.

Move a deal forward

- 1 Drag the card to the next stage
Each card shows how many days it has been in the stage.
- 2 Drop it into "Won" or "Lost"
The win date is recorded for the dashboard and analytics.
- 3 "Create an order" from the deal
To collect the sale in the Sales module.

Customize your pipelines

To...	Do this
Create a pipeline	"New pipeline": 7-stage standard template or empty pipeline.
Add a stage	"Add a stage": it goes before "Won".
Reorder	Drag the column header.
Set a stage outcome	Edit the stage: open, won or lost (only one of each per pipeline).
Delete a stage	Its deals move to the stage you choose.
Switch view	Kanban or List, top right.

Monday alert

Every Monday at 9 am (organization time), the owner gets a notification with the number of open deals that haven't moved in 7 days.

Guide > Conversations

Conversations

Every reply from your contacts, by email and SMS, in a single inbox.

Where
Conversations

Channels
Email · SMS

Roles
Owner, Administrator, Closer,
Community Manager, Virtual
Assistant

Your two channels

Channel How it works

Email Sent by VODOO CRM on behalf of your organization. Nothing to set up: replies land here.

SMS From your own Twilio account and number. Twilio bills your texts directly.

Reply to a contact

- Open the conversation in the list**
- Type your message**
Ready-made quick replies: welcome, follow-up, sales, closing.
- Attach files if needed**
Up to 5 files, 10 MB each.
- "Send"**
A failure shows "Not sent" and why.

Keep the inbox tidy

All **Open** Snoozed Closed

Action	What it is for
Assign	Hand the conversation to a team member.
Snooze	Set it aside for later.
Close · Reopen	Mark it as handled, or pick it up again.
New email conversation	Write to a contact first.
Search	By contact name or email.

Consent handled for you
A contact who replies STOP no longer gets your texts (START resubscribes them). Every email carries an unsubscribe link. Campaigns and workflows skip unsubscribed contacts.

History
A thread shows the latest 100 messages; "Older messages" loads the rest. A deleted contact's conversation stays readable, but you can no longer reply.

Guide > Broadcasts



Broadcasts

Standard and up

One personalized message, sent at once to your whole base or to selected tags.

Where
Broadcasts

Plan
Standard, Pro, Agency

Roles
Owner, Administrator, Community Manager, Marketer

Send a campaign

- 1 "New broadcast", then Email or SMS
- 2 Give it a name
Internal: your contacts don't see it.
- 3 Write the subject and message
Variables in one click, e.g. `{{contact.first_name}}`.
- 4 Choose the audience
All contacts, or by tags. The real number of recipients is shown.
- 5 "Send me a test"
To check how the email looks.
- 6 "Send campaign", then confirm

Email or SMS?

	Email	SMS
Sender	Your organization	Your Twilio number
Unsubscribe	Link added	"STOP" added if missing
Hours	Any time	Mon-Sat, 8 am-8 pm
Length	Free	1,600 characters max.
Tracking	Delivered, opened, clicked	Delivered, failed

Track a campaign

Queued Sending **Completed** Failed Canceled

Sent Delivered Opened Clicked Failed Skipped

"Skipped" covers unsubscribed contacts and contacts without an address. "Cancel campaign" stops the remaining sends; messages already sent stay sent.

Monthly email quota

Emails included per month: 2,000 (Basic), 10,000 (Standard), 50,000 (Pro), 100,000 pooled (Agency), 500 during the trial. A send to 1,000 contacts uses 1,000. Texts are not counted: they go through your Twilio account.



Workflows

A trigger, then steps that run on their own for each contact.

Where
Workflows

Plan
All (5 to 100 active)

Roles
Owner, Administrator, Marketer,
Project Manager

Create a workflow

- 1 "New workflow"
Name and optional description.
- 2 Choose the trigger
And its filter: a tag, a stage, a form, a channel...
- 3 Add steps in the editor
Click to add, drag to move, **Del** to delete.
- 4 Set up each step in the panel
- 5 "Save", then "Activate"

Triggers

Form submitted Message received Payment received
Appointment booked Contact created Tag added
Pipeline stage Webhook Manual

"Manual" is started from a contact record ("Start a workflow"). "Message received" answers at most once every 24 h per contact, never to a STOP or an auto-reply.

Available steps

Group	Steps
Messages	Send Email Send SMS
Flow control	Wait Condition (If/Else)
CRM actions	Add Tag Remove Tag Create Task Change Stage
Advanced	Enroll in Workflow Review Request Send Webhook · Pro and up

Test and monitor

- 1 "Test" in the editor
Pick a contact: actions really run. The workflow must be saved and active.
- 2 Open the workflow page
In progress, completed, failed, total, and the run history.
- 3 Read a run's details
Each step: succeeded, skipped or failed, with the reason.

Personalization variables

Variable	Replaced by
{{contact.first_name}}	First name
{{contact.full_name}}	First and last name
{{contact.email}}	Email
{{contact.phone}}	Phone
{{contact.company}}	Company
{{org.name}}	Your brand name
{{message.subject}}	Subject of the email received

Guide > Analytics



Analytics

Standard and up

Your revenue, conversions, channels and emails over the period of your choice.

Where
Analytics

Plan
Standard, Pro, Agency

Roles
Owner, Administrator, Marketer,
Accountant/Member

⌚ Pick the period

Last 7 days Last 30 days Last 90 days

Each trend compares the period with the previous one of the same length. "Refresh" reloads the figures, "Export" downloads everything as CSV.

|| What you measure

Block	What it shows
Won deal value	Total of deals won over the period.
New contacts · Deals won	Volumes for the period.
Conversion rate	Deals won ÷ deals created, never above 100%.
Revenue trend	Deals won and sales collected, month by month.
Pipeline funnel	Open and won deals per stage, for the pipeline you pick.
Acquisition channels	New conversations per channel.
Email performance	Sent, delivered, opened, clicked, bounced.
Top contacts	Value of deals won per contact.
Recent conversions	The latest deals won.

💡 Dashboard or Analytics?
The dashboard sums up the current month; Analytics lets you pick the period and compares it with the previous one.

ⓘ Currency
Amounts are in the organization's currency, set in Settings > General.

Guide > Funnels



Funnels

Standard and up

Web pages hosted by VODOO CRM whose forms feed straight into your contacts.

Where
Funnels

Plan
Standard, Pro, Agency

Public address
vodoocrm.com/f/...

Create and publish

- 1 **"New funnel"**
Name and address (URL), e.g. `premium-offer`.
- 2 **"Edit", then add pages**
- 3 **Click a block to add it**
Then click the block to edit its text, images and fields.
- 4 **Changes save on their own**
An indicator flags any unsaved change.
- 5 **"Preview", then "Publish"**
The preview matches the public page and sends nothing.

Blocks

Hero Section Text Image Video Form
Testimonial Call to Action

Measure

Views Visits to the funnel's pages.
Submissions Forms submitted.
Conversion Leads ÷ views.

Manage your funnels

Action	Effect
Duplicate	A full copy to adapt.
Copy link	The public address on your clipboard.
Rename	The funnel or a page.
Unpublish	The page is no longer reachable.
Delete	Responses already received are kept; the contacts stay.

Good to know

Each form submitted creates the contact, or completes the one that already has this email, and starts the "Form submitted" workflows. If your plan no longer includes Funnels, published pages stay online but can no longer be edited.

Guide > Calendar



Calendar

Your appointments, and a public page where customers book a slot on their own.

Where
Calendar

Plan
All plans

Public link
vodoocrm.com/book/...

Create an appointment

- 1 "New appointment"
- 2 Title, date, start and end time
- 3 Contact, place or video link, notes
The "Join" button opens the video link.
- 4 "Create appointment"

Views and statuses

Month Week Day List

Scheduled Confirmed Completed Cancelled

No show

Open your booking page

- 1 "Booking settings"
- 2 Name shown to customers, time zone, buffer between appointments
- 3 Your availability, day by day
- 4 Save, then copy your link
Share it by email, SMS or on your website. Switched off, the page stops taking bookings.

What your customer gets

Confirmation	An email with the .ics file for their calendar.
Reminder	An email 24 h before the appointment.
Cancel · reschedule	In one click from their emails.
In the CRM	The contact is created or completed, the "Appointment booked" workflow starts.

Google Calendar

Connect Google Calendar in Settings > Integrations to send your upcoming appointments there.

Guide > Sales



Sales

Standard and up

Your catalog, your orders and online payment through your own Stripe account.

Where
Sales

Plan
Standard, Pro, Agency

Payment
Your Stripe account

Your catalog

- 1 "New product"
- 2 Name, price, currency, description
- 3 Recurring product?
For a monthly subscription.
- 4 Active or not
A product already ordered is deactivated rather than deleted.

Your orders

- 1 "New order"
Or from a deal, or from the contact record.
- 2 Customer, products, quantities, notes
All products in an order share the same currency.
- 3 Follow the status

Pending
Paid
Part. paid
Refunded
Cancelled

Get paid online

- 1 **Connect Stripe**
Settings > Integrations: your account's publishable and secret keys.
- 2 **Copy the order's payment link**
Send it to your customer by email or SMS.
- 3 **Your customer pays on a secure Stripe page**
No card data goes through VODOO CRM.
- 4 **The order turns "Paid" on its own**
The "Payment received" workflow starts; a paid course enrolls the buyer.

Your figures

Total revenue, number of orders, average order and paid orders are shown at the top of the page. "Export" downloads your orders as CSV.

Guide > Reputation



Reputation

Ask your customers for reviews and track your rating on the platforms that matter.

Where
Reputation

Plan
All plans

Platforms
Google, Facebook, Trustpilot,
Tripadvisor, Yelp

1. Set up

- 1 "Configure review URLs"
- 2 Paste the address of your review page
For each platform you use, or "Other".

2. Ask for a review

- 1 "Send review request"
- 2 Pick one or more contacts and the platform
Contacts without email or unsubscribed are flagged.
- 3 "Send"
The email button leads to your review page.

3. Record the reviews you get

- 1 "Add a review"
- 2 Rating, text, date and platform
Link it to a contact, or simply name the author.

Track

Sending Sent Clicked Not sent

Average rating Out of 5, from recorded reviews.

Click rate Share of requests whose link was opened.

Automate it

Add the "Review Request" step to a workflow — for example after "Payment received" — to ask every customer for a review without thinking about it.

Guide > Courses



Courses

Pro and up

Build courses from modules and lessons, free or paid, and follow your learners.

Where
Courses

Plan
Pro, Agency

Content
Video · Text · Audio

Build a course

- 1 **"New course"**
Title, description, free or paid access (price).
- 2 **"Add a module"**
A module groups lessons.
- 3 **"Add a lesson"**
Video, text or audio: URL, duration, content.
- 4 **Reorder**
With "Move up" and "Move down".
- 5 **"Preview", then "Publish"**

Enroll learners

- 1 **"Learners" tab**
- 2 **"Enroll a contact"**
The access link is emailed; you can also copy it.
- 3 **Follow progress**
Lessons completed out of the total, for each learner.
- 4 **"Resend link" or "Remove access"**

💡 Paid courses

The buyer of a paid course is enrolled automatically as soon as their order is paid, and receives their access link.

ⓘ Draft

While a course is a draft, your learners see "coming soon".

Guide > Tasks

Tasks

What is left to do, for whom and by when — on your own or as a team.

Where
Tasks

Plan
All plans

Reminder
8 am on the due date

Create a task

- "New task"
- Title and description
- Due date and priority
- Owner and linked contact

High
Medium
Low

Follow your tasks

All
To do
In progress
Done
Overdue

Search and filter your tasks; overdue tasks show by how many days. "Load more" shows the rest of long lists.

Where tasks come from	
From	How
The Tasks page	"New task".
The contact record	"Add task": the contact is already linked.
A workflow	The "Create Task" step, with a due date in days.

Notifications

The owner is notified when a task is assigned to them, then on the morning of the due date, at 8 am in the organization's time zone.

Guide > Settings



Settings

Everything that configures your organization, reserved for the owner and administrators.

Where

Settings (bottom of the sidebar)

Access

Owner and administrators

Other roles

Their display language only

Sections

Section	What you set there	Plan
General	Name and logo, brand name, website, time zone, currency, date format, interface language and language of the messages sent to your contacts.	All
Team	Members, roles, invitations.	All
Channels	Email and SMS.	All
Integrations	Stripe, Google Calendar, Notion · Zapier, Make, n8n (Pro +)	All
Billing	Plan, this month's usage, payment method, invoices.	All
API & Webhooks	API keys and signed outgoing webhooks.	Pro, Agency
White Label	Name, logo, favicon, colors, subdomain, custom domain.	Agency

Invite your team

- Team > "Invite a member"**
Their email and role.
- They receive a link by email**
A valid invitation takes a seat on your plan.
- Expired? "Resend" or "Revoke"**
- Role editable at any time**
A removed member is deactivated, and can be reactivated.

Connect your channels

- Email** no key
Choose the sender name. The reply address is created for you; a copy of replies can go to your usual mailbox.
- SMS** Twilio
Account SID, Auth Token and your number, then paste the URL shown into your Twilio number ("A message comes in").
- "Test connection"**
VODOO CRM checks your credentials.

Danger zone

Deleting the organization (Settings > General, owner only) erases all its data. It is refused while a subscription is active: cancel it first in Billing.

Guide > Plans and limits



Plans and limits

Four plans, no commitment, cancel any time from Billing.

Compare plans

	Basic	Standard	Pro	Agency
Monthly price	\$29	\$69	\$129	\$249
Annual price (per month)	\$23	\$55	\$103	\$199
Contacts	500	5,000	50,000	50,000
Users	3	10	25	25
Active workflows	5	25	100	100
Pipelines	1	Unlimited	Unlimited	Unlimited
Emails per month	2,000	10,000	50,000	100,000 pooled
Contacts, pipeline, conversations, calendar, reputation, tasks	●	●	●	●
Workflows with conditions (If/Else)	●	●	●	●
Dashboard (basic analytics) · CSV export	●	●	●	●
SMS via your Twilio account	●	●	●	●
Broadcasts, funnels, sales, advanced analytics	—	●	●	●
Courses (LMS)	—	—	●	●
API & Webhooks · Zapier, Make, n8n	—	—	●	●
Advanced roles (Closer, Marketer...)	—	—	●	●
White label · centralized billing	—	—	—	●
5 client sub-accounts (Standard plan) with usage tracking	—	—	—	●
60-minute kickoff session	—	—	—	●
Support	Email	Email	Priority	Priority
Availability target	99.5%	99.5%	99.5%	99.5%

Billing

Prices in US dollars, excluding tax. Annual billing costs about 20% less. Change plan or card, or download an invoice: Settings > Billing, then the secure Stripe portal.

SMS

Texts go through your own Twilio account, on every plan: Twilio bills them directly. Only emails sent by VODOO CRM count towards the quota.

Limits

Billing warns you as a limit gets close. A limit only blocks creating new items: your data stays readable and exportable, even after a trial ends.

Guide > Roles and agency



Roles and agency

Ten roles to give everyone the access they need, and the Agency space for your clients.

Access by role

Owner	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Administrator	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Closer Pro +	●	●	●	●	—	—	—	—	●	—	—	—	●	—
Community Manager Pro +	●	●	—	●	●	—	—	—	—	—	●	—	—	—
Editor/Graphic Pro +	●	—	—	—	—	—	—	●	—	—	—	●	—	—
Marketer Pro +	●	●	—	—	●	●	●	●	—	—	—	—	—	—
Graphic Designer Pro +	●	—	—	—	—	—	—	●	—	—	—	●	—	—
Project Manager Pro +	●	●	—	—	—	●	—	—	●	—	—	—	●	—
Virtual Assistant Pro +	●	●	—	●	—	—	—	—	●	—	—	—	●	—
Accountant/Member	●	—	—	—	—	—	●	—	—	●	—	—	—	—

Dashboard · Contacts · Pipeline · Conversations · Broadcasts · Workflows · Analytics · Funnels · Calendar · Sales · Reputation · Courses · Tasks · Settings



Good to know

Owner, Administrator and Accountant/Member are on every plan; the other roles come with Pro and up. Only the owner and administrators manage Settings.

The Agency space

- Agency > "New client"**
Up to 5 sub-accounts, on the Standard plan.
- "Open" to work in their space**
"Back to agency" brings you back.
- "Invite client"**
They get their own access.

- Billing** Centralized on the Agency subscription.
- Emails** 100,000 a month, shared with your clients.
- Usage** Emails, contacts and members for each client.
- Support** Your clients' Feedback button reaches you.

Guide > Help and tips



Help and tips

Time-saving habits, and what to do when something gets stuck.

Shortcuts

Keys	Action
% K · Ctrl K	Global search
↑ ↓ · Enter	Browse and open a result
Esc	Close a dialog
Del	Delete a step (workflow editor)

Good habits

- 1 Tag contacts from the import**
Your campaigns and conditions rely on it.
- 2 Test a workflow on your own record**
- 3 Put a wait before every follow-up**
- 4 Check the Pipeline every Monday**
Alongside the inactive deals alert.

Common issues

You see...	What to do
No sign-in code	Check your spam folder, then ask for a new code.
"Invalid confirmation link"	Link already used or expired: sign in or reopen the invitation.
A module is missing	Your role or plan doesn't include it: ask your administrator.
"Monthly email quota reached"	Upgrade your plan or wait for the 1st of the month.
A "Skipped" step	Read its reason: unsubscribed contact, no email, no number...
"Set up your SMS channel first"	Settings > Channels > SMS.
No payment link	Connect Stripe in Settings > Integrations.
"URL refused: public HTTPS required"	The webhook must target a public https:// address.

Need help?

E-mail	contact@vodoocrm.com	Documentation	vodoocrm.com, "Resources" footer.
Assistant	Instant answers, on the right edge.	Agency	Agency client? They answer you directly.
Feedback	The button just below it.		