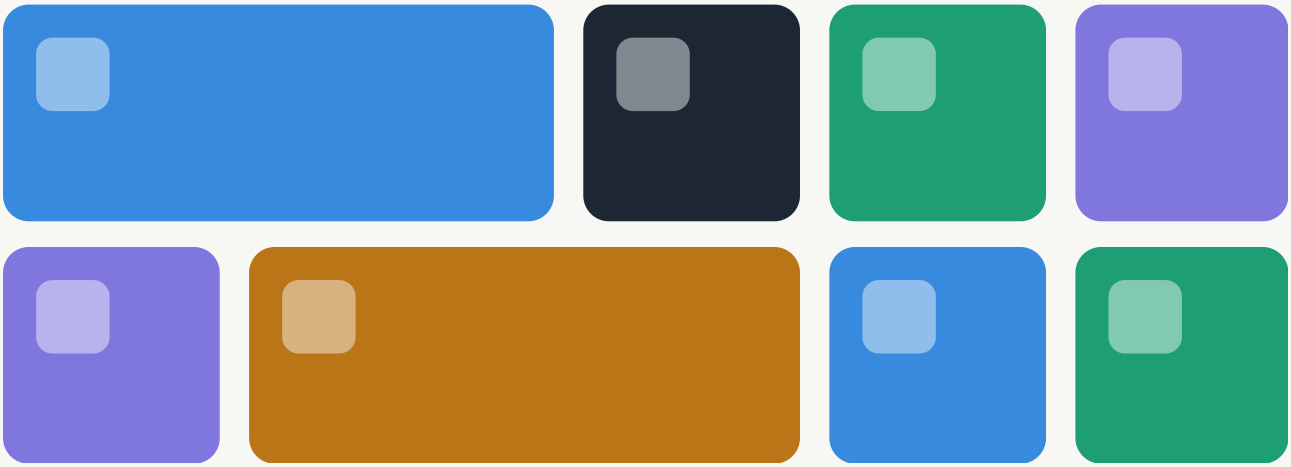
BPMSquare

CHAPTER 5 · CUSTOMER EDITION

Marketing Guide

Chapter 5 of the BPMSquare solution guide.

New way of customer relationship



Provided by **Snasquare**

Powered by **BPMSquare** · Snapshot 2026-10-29

CHAPTER 5

5 Marketing

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Screen names and button words may be refined as the product improves. If a name here is slightly different on your screen, look for the same idea nearby. Anything that says “verify” could not be confirmed from the product and should be checked with your BPMSquare contact before you rely on it.

About this chapter

This chapter is for marketers and the consultants who set Marketing up. For each screen it explains what it is, where it is, who uses it, how to do the common tasks, what the statuses mean, how it connects to the rest of BPMSquare, and what to watch for. It is a reference. For a gentler walk-through of setup, see the Marketing how-to guide (`docs/guides/marketing-how-to.md`).

How Marketing is laid out

Marketing lives in the left menu under **Marketing**. It has twelve screens: Segmentation, ABM programs, Campaigns, Newsletters, WhatsApp, Events, Forms, Journeys, Buying signals, Leads, Scored leads and Revenue by source. **Partners** sits under **Master data**. Settings that change Marketing behaviour are under **Settings > Marketing**.

Each screen is a separate module. The BPMSquare team switches modules on for your workspace in the platform admin console. Your own administrator cannot do it. A module that is off does not appear in the menu, and nothing is lost while it is off. Your administrator can also hide screens for a person through business roles in **Settings > People**. That only hides the screen from their menu. It is not a security lock.

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The order of sections 2 to 13 follows the order of the **Marketing** menu.

Not in the product

These are not in the product at this snapshot, so this chapter does not describe them as working:

- Live WhatsApp delivery. The only WhatsApp provider built in is a sandbox that logs messages and sends nothing.
- A Partners screen. The menu item opens a "coming later" placeholder.
- Branching paths in a journey. Journeys are straight lines of steps.
- An automatic confirmation or reminder email for event registrants.
- Sending one WhatsApp template to a whole target group. WhatsApp goes to one person at a time, or from a journey.
- A screen to edit all journey safety values. Quiet hours, days off, emails a day and the WhatsApp weekly cap are editable. The "company in trouble" days and the 200-person confirmation are not.
- Marketing records in the REST API. Consents and ABM can be imported and exported through Data Workbench. Newsletters, forms, journeys, events, WhatsApp, signals and Revenue by source are not in Data Workbench or the API.

1. Module switches and settings

What it is

Each Marketing screen has a module flag. Some flags need another flag to be on first.

Menu item	Module flag	Also needs	Business role entry
Segmentation	`marketing`		Segmentation
ABM programs	`abm`	`marketing`	ABM programs
Campaigns	`marketing`		Marketing Campaigns
Newsletters	`newsletter_studio`	`marketing`	Newsletters

Menu item	Module flag	Also needs	Business role entry
WhatsApp	`whatsapp_marketing`	`marketing`	WhatsApp
Events	`marketing_events`	`marketing` and `marketing_forms` . The follow-up also needs `journeys`	Events
Forms	`marketing_forms`	`marketing`	Forms
Journeys	`journeys`	`marketing` . A newsletter step needs `newsletter_studio` . A WhatsApp step needs `whatsapp_marketing`	Journeys
Buying signals	`buying_signals`	`marketing`	Buying signals
Leads	`leads`		Leads
Scored leads	`marketing_scoring`	`marketing` and `leads`	Leads
Revenue by source	`marketing_attribution`	`marketing` . Revenue figures need `pipeline`	Revenue by source
Partners	`partners`		Partners

Where to find the settings

Setting	Menu path	URL path	Needs
Consent: topics, rules by country, counting opens	Settings > Marketing > Consent	`/settings/marketing-consent`	`marketing_scoring` or `newsletter_studio`
Limits: quiet hours, days off, emails and WhatsApp per person	Settings > Marketing > Consent, tab **Limits**	`/settings/marketing-consent?tab=limits`	Shown only when `journeys` or `whatsapp_marketing` is on
Leads: scoring rules and hand-over	Settings > Marketing > Leads, tabs **Scoring** and **Hand-over**	`/settings/marketing-leads`	`marketing_scoring`
Brand kit: logo, colours, fonts, footer	Settings > Marketing > Brand kit	`/settings/brand-kit`	`newsletter_studio`

Setting	Menu path	URL path	Needs
Who gets new sales- ready leads	Settings > Coverage, field **Who gets new sales-ready leads**	`/settings/coverage`	Coverage
Email output: where email really goes	Settings > Integrations > Email output	`/settings/email-output`	Always available
Inbox channels	Settings > Integrations > Inbox channels	`/settings/inbox`	`inbox`
Settings pages are for administrators only. **Rules that apply to every screen below** Campaigns, newsletters, journeys and WhatsApp check the consent record for each person at the moment of sending. A demo workspace never reaches a real customer. All email is redirected to one internal inbox, and WhatsApp is only logged. Most explanations on screen sit behind a small **i** icon. Tap it for the reason behind a setting.			
2. Segmentation			

What it is

A target group is a saved audience. You describe it with rules about accounts, for example "Account type is OEM / Vendor and City contains Mumbai". You can reuse it in campaigns, newsletter sends and ABM programs. The menu calls it Segmentation. The saved object is called a target group.

Where to find it

Marketing > Segmentation (`/marketing/segments`). New group: **+ New target group** (`/marketing/segments/new`). A group opens at `/marketing/segments/<id>` .

Who uses it and which module switches it on

Marketing and sales staff who build audiences. Module: `marketing` . You need edit rights on the Segmentation role entry to create or change a group, and view rights to see the list.

How to use it

Create a target group

1. Open **Marketing > Segmentation** and select **+ New target group**.
2. In **Target group name**, type a name your team will recognise, for example "OEM accounts, Mumbai".
3. On the left, find an attribute. Click it, or drag it onto the canvas. Attributes are grouped as Account info, Location, Business, Engagement and Coverage. Two more groups appear only when their module is on: Lead scoring (`marketing_scoring`) and Buying signals (`buying_signals`). An ABM group is always offered.
4. For each condition, choose how to compare (is, is not, contains, is greater than, is less than, is before, is after, is set, is not set) and type or pick the value.

5. With two or more conditions, choose **Match ALL** or **Match ANY**.
6. Read the line under the canvas. It shows "→ N recipients" and, in brackets, how many are opted out and how many have no email on file.
7. Select **Create target group**.

Add or remove single accounts, or loose addresses

1. In the card **Manual overrides (optional)**, use **Add or remove specific accounts** to force an account in or keep one out.
2. Use **Also send to emails not in the system** to add loose email addresses.

Use a group

1. On the Segmentation list, select **Use in campaign** on a row. New campaign opens with the group loaded.
2. On any campaign, use **Load a saved target group…** in the Target audience card.
3. In the newsletter **Send…** panel, pick the group in **Audience**.
4. When you create an ABM program, choose **A marketing target group** under **Source**.

Change or delete a group

1. Click the name in the list, change the rules and select **Save changes**.
2. To remove a group, select **Delete** on its row and confirm. Campaigns already built from it are not affected.

Statuses

A target group has no status. The preview line counts three things.

Count	Meaning
recipients	Accounts, and typed addresses, that would be targeted
opted out	Accounts whose marketing opt-out flag is set
no email on file	Accounts with no email address

How it connects

- The rules read the **account**, not the contact. The address used is the account's email, or its second email.
- Campaigns and newsletter sends use a group as their audience.
- ABM can copy a group into its target list. The copy does not change when the group changes.
- Lead score, buying stage and ABM fields let you target by what people did, not only who they are.
- The field **Marketing opt-out** filters on the company-level opt-out flag.
- A group does not decide who may be emailed. Consent is checked later, at the moment of sending (see Consent and unsubscribe).

Good to know

- If a group has conditions, the account-type tick boxes on a campaign are ignored. The campaign page says "Type filters below are ignored while this is active."
- An account you removed by hand is never included. An account you added by hand is always included, even when it does not match the conditions.

- A typed address that already belongs to a matched account is not added twice.
- Lead score and lead stage conditions only match accounts that have a scored lead.
- ABM conditions are offered even in a workspace without ABM, but never match there.
- Segmentation and Campaigns are the oldest Marketing modules, so they may already be in daily use at your company.

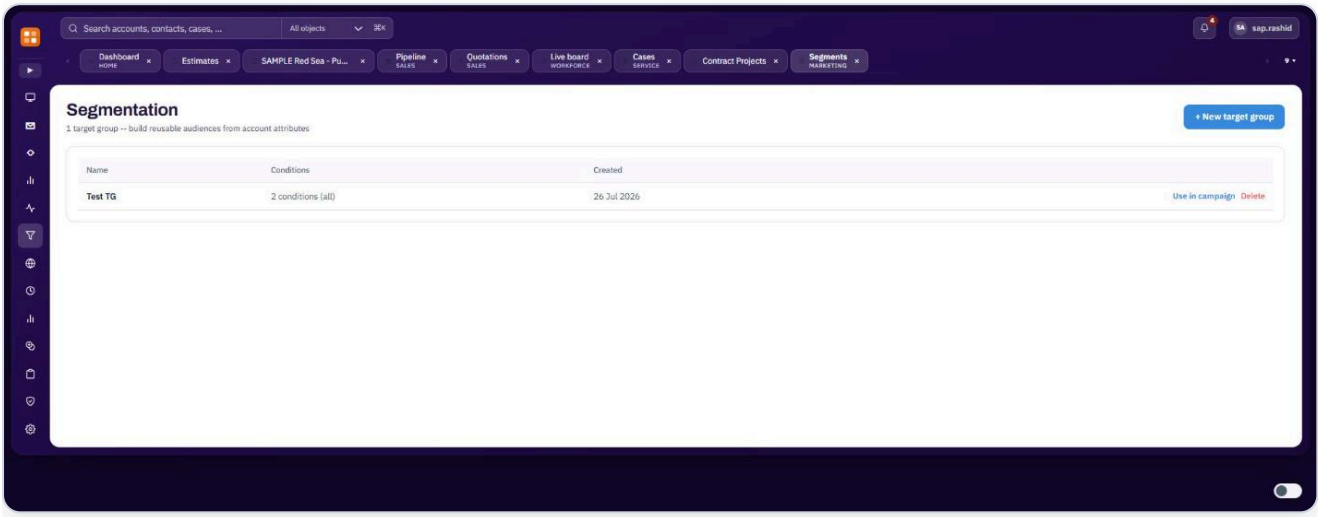


FIGURE 1 The list of target groups with the Conditions column and the Use in campaign link

3. ABM programs

What it is

Account-based marketing (ABM) means working a chosen list of companies as a team instead of mailing everyone. A program holds the target accounts, the people at each company (the buying group), the progress of each company, and the results.

Where to find it

Marketing > ABM programs (`/marketing/abm`). New program: **+ New program** (`/marketing/abm/new`). A program opens at `/marketing/abm/<id>` . A company inside a program opens at

`/marketing/abm/<id>/accounts/<targetId>` .

Who uses it and which module switches it on

Account owners and marketers. Module: `abm` (needs `marketing`). Optional: `buying_signals` adds each company's buying stage.

How to use it

Create a program

1. Open **Marketing > ABM programs** and select **+ New program**.
2. Under **The program**, fill in **Name**, **Kind** (New business or Expansion), **Owner**, **Goal** (one plain sentence), **Measured in** (Deals won, Deals opened, Accounts responding or Revenue), **Target**, **Starts on** and **Ends on**.

3. Under **How each company is worked**, choose **Default tier**: 1:1 (its own plan, worked personally), 1:few (a small cluster sharing content) or 1:many (the program's standard plays). Under **Roles every company needs**, tick the roles. Decision maker and Influencer are the standard.
4. Under **Start the target list from**, choose **Start empty**, **A marketing target group** or **A Coverage segment**.
5. Save the program, then select **Go live**. **Pause** and **Resume** are in the same place.

Add target accounts

1. Open the **Target accounts** tab and select **+ Add accounts**.
2. Choose **By name**, **From a marketing target group** or **From a Coverage segment**. For a group or segment, select **Preview** first.
3. Pick **Tier for these companies** and select **Add accounts**.
4. The list is a copy. To see what changed in the source, select **Refresh from source**. Nothing changes until you tick the changes and select **Apply**.

Build the buying group

1. Click a company and open the **Buying group** tab.
2. Select **Add person**. Pick a **Person at this company** and a **Role in this program** (Decision maker, Influencer, User, Blocker or Unknown). You can also set **Our owner for this person**. The person must already be a contact of that company.
3. Use **Call first** to mark who to phone first.
4. A missing role shows as a grey row with an **Add one** button. On the program, the **Buying groups** tab lists every company with a gap.

Move progress

1. Select **Check progress**, on the program or on one company. It reads quotes, emails, forms, WhatsApp and deals, and moves companies forward by fixed rules.
2. To set progress by hand, open the company and select **Update progress**. A reason is required.
3. On the company's **Plan** tab, set **What happens next**, **Due on**, **Who does it**, **Tier**, **Owner for this program** and **Deal this program is pursuing**. Then select **Save plan**.

Read the results

1. Open the **Results** tab. It shows the funnel (Targets, Reached, Responding, In talks, In a deal, Won), the goal sentence, money from linked deals, and results by tier.

Statuses

Program:

Status	Meaning
Draft	Being set up
Live	Running
Paused	Stopped for now
Done	Finished. Menu: **Mark as done**

Status	Meaning
Archived	Hidden from the default list. Menu: **Archive**

Company progress inside a program:

Progress	Meaning
Planned	In the program, nothing has happened yet
Reached	An email, WhatsApp message or quote was delivered to someone in the buying group
Responding	Someone in the buying group clicked, opened or accepted a quote, filled in a form, replied on WhatsApp or viewed a page
In talks	A meeting happened. Only a person can set this
Deal open	A deal is linked
Won / Lost	Follows the linked deal
Dropped	You stopped pursuing it. A reason is required

Select any progress pill to open **Why this status?**. It names the rule and the events behind it.

How it connects

- Target lists come from Segmentation groups or Coverage segments.
- Progress reads the shared event stream: emails, WhatsApp, quotes, forms and web visits.
- A linked deal from the Pipeline moves a company to Deal open, then Won or Lost.
- Buying stage from Buying signals shows beside progress.
- ABM conditions (in program, progress, tier) can be used in Segmentation.
- Programs, targets and members can be imported and exported through Data Workbench.

Good to know

- Only events from people named in the buying group count toward progress.
- By default a company is not marked **Responding** until every required role is filled. The pill then says it would be Responding, but a required role is missing.
- Rules only move a company forward. Going back, **Dropped** and **In talks** are a person's choice. Each needs a reason, saved with your name and the date.
- **Check progress** does not run by itself.
- With fewer than 20 targets the results carry a "Small sample" note. Read them as a list, not a trend.

4. Campaigns

What it is

A campaign is one email sent to an audience. You can write it here, from a festival or service template or in free text. Or you can send a newsletter you designed in Newsletter Studio. Either way, the campaign row is the send

record: it lists every recipient and what happened to them.

Where to find it

Marketing > Campaigns (`/marketing`). New campaign: **+ New Campaign** (`/marketing/new`). A campaign opens at `/marketing/<id>` .

Who uses it and which module switches it on

Marketers. Module: `marketing` . You need edit rights on the Marketing Campaigns role entry to create or send.

How to use it

Send a festival or promotion email

1. Open **Marketing > Campaigns** and select **+ New Campaign**.
2. Type a **Campaign name (internal)**. Only your team sees it.
3. Either open **Start from a template**, choose a folder and then a design, and write your words in the custom message. The folders are Christmas, Diwali, Eid, Ganesh Chaturthi, Holi, Independence Day, Makar Sankranti and Pongal, Navratri and Dussehra, New Year, Raksha Bandhan, Republic Day and Service Reminder. Or skip templates and write the **Subject** and **Message** yourself.
4. In the subject you can use `{{account_name}}` and `{{company_name}}` . Each is replaced for every recipient.
5. In **Target audience**, tick account types, or pick **Load a saved target group...**, or use **Add or remove specific accounts** and **Also send to emails not in the system**.
6. Read the line "→ N recipients" and select **Save draft**.
7. On the draft, review it and select **Send now**. Confirm "Send this campaign now?".

Change a draft

1. Open the campaign from the list, edit it and select **Save changes**.

Read the result

1. Open the campaign. The facts bar shows **Sent**, **Failed**, **Skipped** and **Leads**.
2. The **Recipients** tab lists each recipient and the reason for any skip.
3. For a campaign that sent a newsletter, a card shows results by language and clicks per link.

Keep the audience for later

1. In the Target audience card, select **Save as target group**.

Statuses

Campaign:

Status	Meaning
Draft	Not sent. You can edit it
Sending...	The send is running
Sent	The send finished. Failed and skipped counts are on the row

Status	Meaning
Failed	The label exists, but no step that sets it was found

Recipient:

Status	Meaning
Sent	Handed to the email service
Failed	The email service refused it. The reason is shown
Skipped (opted out)	The company's marketing opt-out flag is set
Skipped (no email)	The account has no email address
Skipped (no consent)	The person has not agreed to the campaign's topic
Skipped (no contact)	The account has no contact record, or no contact matches the address
Skipped (no language)	No ready language for the person (newsletter sends)
Pending	Waiting

How it connects

- **Accounts.** A plain campaign goes to the email on the account.
- **Leads.** Each plain campaign email carries an **Interested? Tell us more** button. When the recipient opens the link and presses the button, a lead is created. Its title is "Interest from campaign: " and its source is Campaign. There is one lead per company per campaign. The Leads list shows the campaign name as a link back.
- **Unsubscribe.** The footer has an **Unsubscribe** link (see Consent and unsubscribe).
- **Newsletters.** The **Send…** button in Newsletter Studio creates a campaign named after the newsletter and the date, and sends it.
- **Email log.** Every send is logged against the campaign.
- **Revenue by source.** Campaigns are one of the items you can see revenue for.

Good to know

- A campaign can be sent only once. To send again, create a new campaign.
- A plain campaign checks the company's marketing opt-out flag, whether an email address exists, and each person's consent for the campaign's topic, like a newsletter. An account with no contact record is skipped.
- Typed email addresses that are not accounts get no unsubscribe link and no interest button in a plain campaign.
- Sending is one email at a time with a short pause. A single send is sized for roughly 150 to 200 recipients, because it must finish within about a minute. Split a larger audience into several target groups.
- On a demo workspace, every email goes to the internal inbox set in **Settings > Integrations > Email output**. The subject starts with "[Redirected · for …]" and the body names the intended recipient. With no inbox set, nothing is sent and the screen says why. A normal workspace can also choose redirect mode there.

- Emails are sent from your workspace's address on BPMSquare's sending domain. Replies go to the email in your company information.

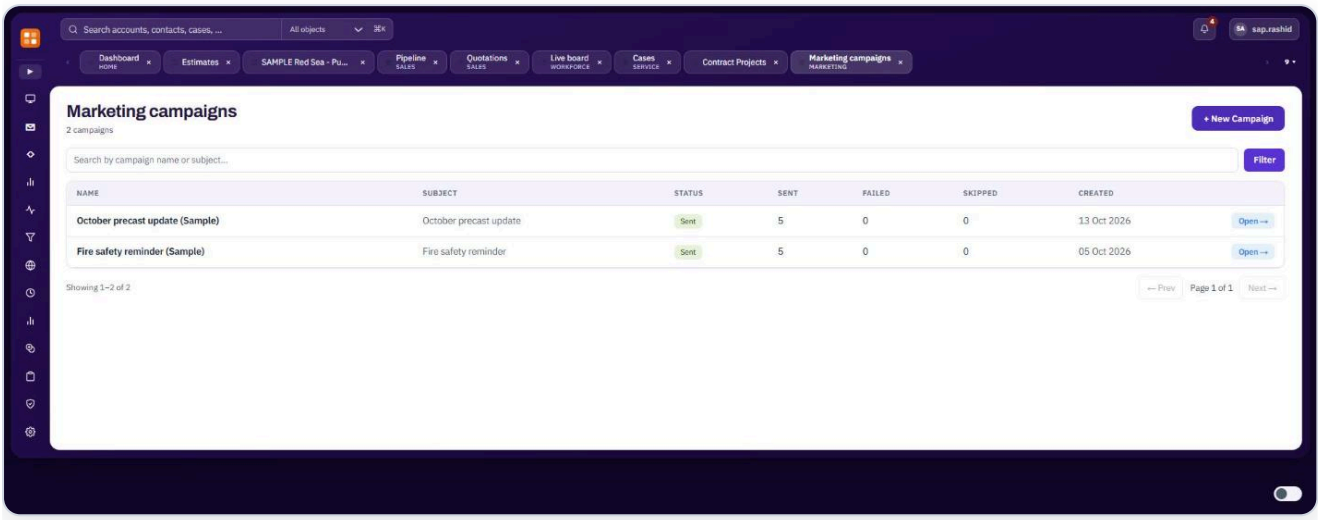


FIGURE 2 The campaign list with Draft, Sent and Failed pills and the Sent, Failed, Skipped counts

5. Newsletters

What it is

Newsletter Studio is where you design an email once in English, add Arabic or another language on top, check it against fixed rules, and send each person their own language. The email is built from blocks.

Where to find it

Marketing > Newsletters (`/marketing/newsletters` , chips **Newsletters** and **Templates**). New: **+ New Newsletter** (`/marketing/newsletters/new`). A newsletter opens at `/marketing/newsletters/<id>` . The brand kit is at **Settings > Marketing > Brand kit** (`/settings/brand-kit`).

Who uses it and which module switches it on

Marketers write and send. An administrator sets the brand kit. Module: `newsletter_studio` (needs `marketing`).

How to use it

Set up once (administrator)

1. Open **Settings > Marketing > Brand kit**. Set the logo (or **Use the workspace logo instead**), colours, **Font**, **Tone for AI writing**, the footer **Address lines** and social links. Every newsletter uses it.
2. Open **Settings > Marketing > Consent**. Check the **Topics** list. Leave **Count newsletter opens** off unless you need it.

Write a newsletter

1. Open **Marketing > Newsletters** and select **+ New Newsletter**. The options on the left are in four tabs: **Start**, **Blocks**, **Languages** and **Health**.

2. In **Start**, give it a **Name**. Pick a **Category** (Newsletter, Offer, Event, Announcement or Festival) and a **Consent topic**, or **Any consent topic**.
3. Choose how to begin:
   - **Write it for me.** Answer **What is this newsletter about?** (at least 10 characters). Optionally tick **Use my recent products** and **Use my recent campaigns**. Select **Write it for me**.
   - **Start from a design.** Pick one of your templates or a built-in design: Blank, Monthly update, Offer, Event invitation, Announcement, Eid greeting or Diwali greeting.
   - **Blank.** A brand header and footer only.
4. In **Blocks**, click a block to edit its words, drag to reorder, and use **Add** for text, image, button, columns, product card, event, divider or social. Under text you can select **Shorter**, **Friendlier** or **More formal**, and **Undo rewrite**.
5. Write the **Subject** and **Preheader** (the line next to the subject in the inbox) below the preview. Use **Desktop**, **Phone**, **Light** and **Dark** to preview.
6. Select **Save**. The menu has **Duplicate**, **Save as template**, **Versions**, **Email HTML**, **Export HTML**, **Brand kit**, **Archive** and **Delete**.

Add another language

1. Open **Languages**. Pick the language and select **Translate with AI**, or **I'll write it**. Available languages are English, Arabic, Hindi, Urdu and French.
2. Lines the AI was unsure about show **Check this**. Select **Accept** or **Edit**, or **Accept all N lines**.
3. A language can be sent only when every line is checked.
4. Select **Compare languages** to read two languages side by side.

Check the Health tab

1. Open **Health**. Amber items say what to change. Green items are fine. These are fixed rules, not a score. Fix the amber items before sending.

Send it

1. Select **Send...**. A copy of the design is kept automatically, so editing it later never changes what already went out.
2. In **Audience**, keep **Everyone we can email** or pick a saved target group. Select **More** for a one-off: tick account types or use **Add email addresses**.
3. The panel shows "N of M people will receive it", how many get each language, and who is left out and why. Each reason has an **i** with the fix. Nothing is sent yet.
4. Select **Send to N** and confirm. Emails go out at once and cannot be recalled.
5. Select **See what was sent** to open the campaign record.

Statuses

Newsletter:

Status	Meaning
Draft	Being written
Ready to use	Marked ready

Status	Meaning
Archived	Not offered for sending

Language on a newsletter:

Label	Meaning
Written first	The English base
N to check	That language still has lines marked Check this
Ready	Every line is checked. It can be sent

A newsletter send creates a campaign, so it also shows the campaign statuses in Campaigns.

How it connects

- **Consent.** Each recipient is matched to a contact. The consent record is checked for the newsletter's topic at the moment of sending.
- **Languages.** A person gets the contact's preferred language, else the account's, else the fallback language.
- **Campaigns.** Every send is a campaign row with the recipient list, results by language and clicks per link.
- **Journeys.** The **Send a newsletter** step uses a saved newsletter.
- **Leads.** Built-in designs such as Monthly update include an **Interested? button**. A click creates a lead, as in plain campaigns.
- **Preference centre.** The footer link **Manage preferences** opens the preference centre when Forms is on. Otherwise it opens the unsubscribe page.
- **Scoring and signals.** Clicks are always counted and add to lead scores and buying signals.
- **Revenue by source.** Newsletters are one of the items you can see revenue for.

Good to know

- AI is optional. If the workspace has no AI set up, the screen says "AI is not set up for this workspace" and you write everything yourself. AI only suggests. Nothing is saved until you select **Save**.
- The header and footer cannot be removed. The footer carries the unsubscribe line.
- A person who has not agreed to the topic is left out. A typed address that does not match a contact is left out. A language with lines still to check is not sent, and those people get the fallback language.
- With **Any consent topic**, a person needs a yes that covers every topic.
- Opens are not counted unless an administrator turns on **Count newsletter opens**. Clicks are always counted.
- The same pacing and size limits apply as for campaigns.
- A demo workspace is redirect-only, as described under Campaigns.

6. WhatsApp

What it is

WhatsApp marketing lets you write message templates, mark them approved, and send them one person at a time or from a journey, to people who agreed to hear from you on WhatsApp. It also receives replies and delivery updates, and records STOP and START.

Important: the only provider built in today is a **sandbox**. It sends nothing to anyone. Every message is a logged dry run. A real provider has not been connected yet. Do not promise live WhatsApp delivery until it is.

Where to find it

Marketing > WhatsApp (`/marketing/whatsapp` , chips **Open**, **Approved**, **Draft**, **Archived**). New: **+ New Template** (`/marketing/whatsapp/new`). A template opens at `/marketing/whatsapp/<id>` . The number page is at `/marketing/whatsapp/setup` , from the menu item **Number and messages** on the list page.

Who uses it and which module switches it on

Marketers write templates. Only an administrator can mark a template approved or change the number. Module: `whatsapp_marketing` (needs `marketing`). The journey step needs `journeys` too.

How to use it

Write a template

1. Open **Marketing > WhatsApp** and select **+ New Template**.
2. Under **Basics**, give it a **Name (only your team sees it)**, a **Language** and a **Kind of message** (Marketing, Utility or Authentication).
3. Under **The message**, write the **Message**, up to 1,024 characters. Use **Add a detail** to insert Contact name, Company name, Your company, Quote number or Amount.
4. Under **Who may receive it**, pick the **Consent topic**, or **Any consent topic**.
5. Select **Save**.

Approve it (administrator)

1. Under **Approval**, optionally enter **Name at your provider (optional)**.
2. Select **Mark approved** (or **Mark rejected**, with a reason). Changing the words of an approved template sends it back to **Draft**.

Send a test to one person

1. On an approved template, open **Send it to one person**.
2. Type a name in **Who**, pick the person and select **Send**.
3. The result line says whether it was sent, only logged, or refused and why.

Set up the number (administrator)

1. Open **Number and messages**. Under **Number and provider**, choose the **Provider**, enter the **Business number** and any credentials, and select **Set up** (or **Save**).
2. Under **Replies and delivery updates**, copy the **Address for your provider to call**. Select **Make a new signing secret** when needed. The secret is shown once.

3. Under **Match my contacts' numbers**, select **Match numbers** so a START from someone you never messaged can be matched.
4. **Recent messages** lists what went out and came back.

Set the weekly limit (administrator)

1. Open **Settings > Marketing > Consent**, tab **Limits**. Set **WhatsApp messages a week, per person**, from 1 to 20. The standard is 1.

Statuses

Template:

Status	Meaning
Draft	Not approved. Cannot be sent
Approved	Can be sent
Rejected	Marked rejected, with a reason
Archived	Not offered

How it connects

- **Consent.** The consent check on the WhatsApp channel and the template's topic comes first, before anything else is looked at.
- **Journeys.** The step **Send a WhatsApp template** uses an approved template.
- **Replies.** A reply becomes an event that adds to the lead score and to ABM progress, and counts as a touch in Revenue by source.
- **STOP and START.** A message that is only STOP (or the Arabic words) records a withdrawal. START records the opt-in again. A longer message is treated as a reply.
- **Contacts.** The contact's Consent card records WhatsApp consent.

Good to know

- Once approved, a template can go at any time. Free text can go only within 24 hours of the person's last message, and only from a person, never from a journey. There is no free-text screen yet.
- A marketing template is limited to one per person per 7 days by default. Dry runs count toward the limit too.
- A number that would have to be guessed is refused. Numbers need a `+` or `00` and a country code.
- A demo workspace never reaches a real number. It goes to the workspace's test number if one is set, otherwise it is only logged.
- A reply from a number that cannot be matched to a contact creates nothing.

7. Events

What it is

A marketing event is a webinar, exhibition, roadshow or site visit. People register through an existing Form, staff check them in on the day, and you can start a follow-up journey for the people who came or the ones who

did not.

Where to find it

Marketing > Events (`/marketing/events` , chips **All**, **Registration open**, **Draft**, **Completed**). New: **+ New Event** (`/marketing/events/new`). An event opens at `/marketing/events/<id>` with tabs **Details**, **Attendees**, **Follow-up** and **Results**.

Who uses it and which module switches it on

Marketers and event staff. Module: `marketing_events` (needs `marketing` and `marketing_forms`). The follow-up also needs `journeys` .

How to use it

Plan and open an event

1. Open **Marketing > Events** and select **+ New Event**.
2. Under **The event**, fill in **Name**, **Kind** (Webinar, Exhibition, Roadshow, Site visit), **Status**, **Date**, **Starts**, **Ends (optional)**, **Capacity (optional)**, **Venue**, **Link** (https only), **Owner** and **About it**.
3. Under **Registration**, pick the **Registration form**. Make sure that form is **Live**.
4. Under **Follow-up**, pick a **Journey** and **For** (people who came, or people who did not).
5. Save. On the event, select **Open registration**.

Check people in

1. Open the **Attendees** tab. Type in **Search by name or company**.
2. Select **Check in** on a row. Use **Did not come**, **Cancel** or **Register again** as needed.
3. To add a walk-in, use **Add someone**: find the person and select **Register**, or **Register and check in** to do both.
4. After the event starts, **Mark everyone left as not coming** marks the rest.

Start the follow-up

1. Turn the chosen journey on first (see Journeys).
2. Open the **Follow-up** tab and select **Start the follow-up for N people**.
3. The result says how many started, how many were already in, and how many were skipped because there was no person to contact.

Read the results

1. Open the **Results** tab for Registered, Came, Did not come, Not marked yet, Cancelled and the show rate.

Move the event along

1. The main button moves the event on: **Open registration**, then **Close registration**, then **Mark completed**. **Cancel the event** is in the menu.

Statuses

Event:

Status	Meaning
Draft	Not announced. A linked form does not register anyone
Registration open	People who fill in the linked form are registered
Registration closed	No more registrations
Completed	Finished
Cancelled	Stopped. The people who registered stay on the list

Attendee:

Status	Meaning
Registered	Signed up
Attended	Checked in. This is final
Did not come	Marked as a no-show. Can still be changed to Attended
Cancelled	Can register again

How it connects

- **Forms.** Registration is a form submission. The form finds or creates the contact, records consent exactly as the form says, files a lead, and then registers the person. An event never records consent itself.
- **Journeys.** The follow-up puts people into a journey you built. The journey keeps its own consent, quiet-hours and daily-limit rules.
- **Coverage.** Each attendee row shows the company's owner, for the first 60 companies.
- **Scoring and revenue.** "Attended" adds to lead scores. Registration and attendance are touches in Revenue by source.
- **Change history.** Each check-in is logged with who did it.

Good to know

- Nothing is sent to a registrant by the event itself: no confirmation and no reminder. Use the form's thank-you email or a journey.
- Capacity is not enforced. The page shows "N over capacity".
- Attendance is final. A mistaken check-in cannot be taken back.
- A form can belong to one running event at a time.
- The follow-up is a button, not automatic. A person is stamped when started, so the button cannot enrol anyone twice. Someone who already went through that journey is not put through it again.
- The show rate counts only people marked as came or did not come.

8. Forms and the preference centre

What it is

A form is a page, or a box on your website, where a visitor leaves their details. Each submission finds or creates a contact, records consent if the visitor ticked the box, and files a lead. The preference centre is the page each person opens from an email to choose their topics or stop all emails.

Where to find it

Marketing > Forms (`/marketing/forms` , chips **Open**, **Live**, **Archived**). New: **+ New Form** (`/marketing/forms/new`). A form opens at `/marketing/forms/<id>` , with the form and an **Answers** tab.

Public pages: the form at `<your workspace address>/f/<slug>` (add `?embed=1` for the embedded version), the preference centre at `/marketing/preferences/<contactId>/<token>` and the confirm page at

`/marketing/confirm/<contactId>/<token>` . People reach the last two from links in emails.

Who uses it and which module switches it on

Marketers. Module: `marketing_forms` (needs `marketing`). The workspace needs a web address (domain). Without one, a form has no public address.

How to use it

Build a form

1. Open **Marketing > Forms** and select **+ New Form**.
2. **Basics: Name** (internal), **Web address**, **Heading**, **Introduction**, **Button words**.
3. **Fields:** email is always asked. Tick name, company, phone, message and up to three questions of your own (**Your own question 1** to **3**). Tick **Required** where needed.
4. **Consent:** write **The words shown next to the box**. Pick **Consent topics** (none means every topic). Decide **The box must be ticked to send**. The box is never pre-ticked.
5. **After sending:** choose **Show a message** (a thank-you on the form) or **Go to a page** (an https page on your own domain). Then choose the emails:
   - **Send a thank-you email** (on by default) and **Words in the email**.
   - **Ask the person to confirm by email** (double opt-in).
   - **Tell someone about each new answer**, then choose **Who** (a workspace member).
6. **Share:** set **Status** to **Live - visitors can send it**. Select **Save**.

Use **Desktop** and **Phone** above the preview to check both layouts.

Put it on your website

1. Open the form, go to **Share**, and select **Copy embed code** (for your web team) or **Copy address**.

Read the answers

1. Open the **Answers** tab. It shows When, Name, Email, Company and Agreed to emails, with **Previous** and **Next**.

What a visitor does to confirm

1. If the form asks for confirmation, the thank-you email carries a link. The person opens it and presses **Yes, confirm**. The link works for 7 days.

Statuses

Form:

Status	Meaning
Draft	Only your team can see it. Visitors get "not found"
Live	Visitors can open and send it
Archived	Switched off

Consent from a form, as shown on the contact's Consent card:

State	Meaning
Agreed	The box was ticked and no confirmation is needed
Waiting for confirmation	Ticked, but the person has not pressed the link. Does not count as a yes
Did not confirm	Seven days passed without the link
Nothing recorded	The box was not ticked

How it connects

- **Contacts and accounts.** A new email creates a prospect account and a contact. An existing contact is never changed by a form.
- **Leads.** One open lead per person per form. A second submission refreshes the same lead.
- **Consent.** The exact words shown are stored with the consent. See Consent and unsubscribe.
- **Events.** An event registers people through its linked form.
- **Newsletters.** The **Manage preferences** footer link opens the preference centre when Forms is on.
- **Scoring, signals and revenue.** A form submission adds to lead scores and counts as a touch in Revenue by source.

Good to know

- Answers are kept for 180 days. The contact and the lead stay.
- One visitor can send a form 5 times an hour. After that the page says "Too many tries."
- An unticked box records nothing. It never cancels an earlier yes.
- The thank-you email goes out even if the box was not ticked, because it confirms what the person just did. The same person is not emailed twice in an hour.
- **Ask the person to confirm by email** starts on for a workspace based in the European Union and off elsewhere. Change the base country in **Settings > Marketing > Consent**, field **Based in**. You can override it on each form.
- On a demo workspace, the thank-you email and the staff notice are redirected to the test inbox, never to the visitor.

- Opening the preference centre changes nothing by itself. A person marked do not contact, or who used an old unsubscribe link, cannot switch topics back on from a link. They are told to get in touch.

9. Journeys

What it is

A journey is a short automation. It starts when something happens, for example "a quote is sent". Then it waits, sends a newsletter or a WhatsApp template, creates a task for the owner, or notifies the owner. Consent and quiet hours are always respected.

Where to find it

Marketing > Journeys (`/marketing/journeys` , chips **Journeys** and **Archived**). New: **+ New Journey** (`/marketing/journeys/new`). A journey opens at `/marketing/journeys/<id>` with tabs **Build**, **Test** and **Running** (plus **Setup** on a phone). Limits are at **Settings > Marketing > Consent**, tab **Limits**.

Who uses it and which module switches it on

Marketers. Module: `journeys` (needs `marketing`). The send steps also need `newsletter_studio` or `whatsapp_marketing` .

How to use it

Create the Quote follow-up journey

1. Open **Marketing > Journeys** and select **+ New Journey**.
2. Under **Template**, pick **Quote follow-up** (or Blank) and select **Create journey**.
3. The template does this: a Standard Quote is sent, wait 3 days, send a newsletter, create a task to call.
4. Under **Name and start**, check the **Name**, **It starts when** (a quote is sent) and **But only if** (a kind of quote, or **Amount at least**).
5. In the **Send a newsletter** step, pick a saved newsletter under **Newsletter**.
6. Under **Rules**, review **One person per company**, **Pause when the company is in trouble** and the **Quiet hours and limits** chips.

Check it before it runs

1. On **Build**, read **Who would enter today**. It gives a count and warns about people with no consent.
2. Open the **Test** tab. Under **Try it on one person**, type at least two letters of a name, pick a person and select **Show the path**. Nothing is sent and nothing is saved.
3. Select **Save**.

Go live

1. Select **Go live**. If more than 200 people would enter, a message asks you to confirm the count.
2. **Include the last (days)** decides how many days of past events are picked up when you go live. Use 0 for new events only.
3. While the journey is live, the steps are locked. Select **Pause** to change them.

Watch it

1. Open the **Running** tab. See **Entered**, **Where they are**, **What happened**, **Skipped, by reason**, **Tasks for the owner** (with **Mark done**) and the **Run log**. Select **Refresh**.

Statuses

Journey:

Status	Meaning
Draft	Not running
Live	Running
Paused	Not sending. People keep their place
Archived	Finished. The log stays readable

Why a step was skipped or held:

Reason	Meaning
No consent	The person has not agreed to the topic. The journey carries on without that message
Quiet hours	Waiting for the quiet hours or the weekly day off to end
Daily limit	The person already had a journey message in the last 24 hours (or a WhatsApp message this week)
Open urgent case	The company has an old open case or an overdue invoice
Nobody to contact	No contact person, or no email address or usable phone
Needs setting up	No newsletter or WhatsApp template chosen, or the module is off
Stuck	A step is far overdue or failed after retries. The log says why

How it connects

- **Triggers:** a quote is sent or accepted, a deal is created or closed, a case is closed, an invoice is paid, an AMC contract is close to expiring, a lead is created, or someone fills in a form.
- **Steps:** wait, send a newsletter, send a WhatsApp template, create a task for the owner, notify the owner, end. A journey can have up to 12 steps.
- **Newsletters and WhatsApp.** The send steps go through the same send path and consent check as a normal send.
- **Owner.** Tasks and notices go to the company's owner from Coverage. A notice appears in the Nova inbox.
- **Events.** An event's follow-up starts people in a journey.
- **Revenue by source.** Journeys are one of the items you can see revenue for.

Good to know

- Standard limits: no sends from 20:00 to 08:00, Friday off, at most one journey email per person a day, a pause when a case has been open over 30 days or an invoice is overdue, and a confirmation above 200 people. An administrator can change the quiet hours, days off, emails a day and the WhatsApp weekly cap

under **Settings > Marketing > Consent**, tab **Limits**. The case days and the 200-person line cannot be edited on screen.

- Quiet hours follow the timezone set in **Settings > Workforce**, Attendance rules (verify the exact path). If none is set, the product default is used.
- Messages wait for the next allowed time. They are never dropped.
- Steps run within about five minutes.
- Re-entry is "never": a person goes through a journey once.
- A loop guard stops a journey from starting from its own emails.
- On a demo workspace, journey email is redirected like any other.

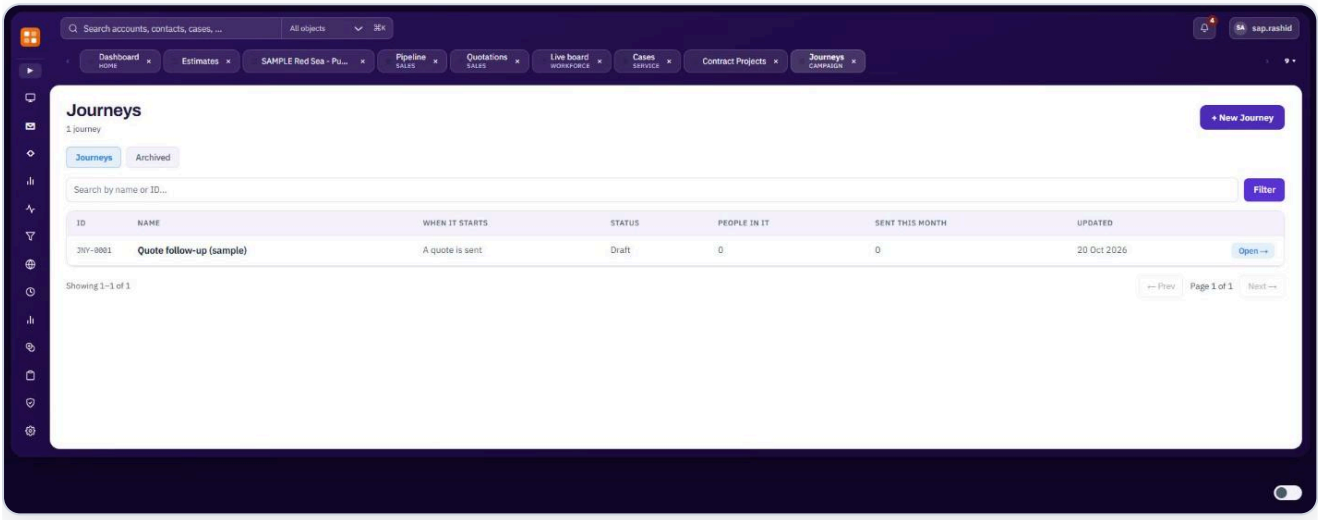


FIGURE 3 The journey list with status and People in it

10. Buying signals

What it is

Buying signals shows which companies look close to buying. It adds up what each company did with you (asked for a quote, clicked a link, has a contract about to end) and gives a stage in plain words. It uses only your own data. It is never an AI guess.

Where to find it

Marketing > Buying signals (`/marketing/signals`), with tabs **In market**, **Did it work?** and **Interests**.

Who uses it and which module switches it on

Salespeople and account owners read it. An administrator sets interests and selects **Rescore now**. Module:

`buying_signals` (needs `marketing`).

How to use it

Set up once (administrator)

1. Open the **Interests** tab. Under **New interest**, give a name and **Keywords**, then select **Add interest**. Add the subjects you sell.

2. Select **Rescore now** the first time so scores appear at once.

Find companies to call

1. Open **In market**. The highest score is at the top.
2. Use **Filters** (a button at the top on a phone). Choose a stage (**All**, Deciding, Comparing, Looking, Silent or **Moved up this week**), **Interest**, **Owner** or **Account name**.
3. Read each row: the stage, the score with an eight-week line, a one-line reason, the owner and a suggested next step.
4. Click a row to open the company. Read **How this is worked out** and the **Signals timeline**.
5. Select the suggested next step, **Open account** or **Analyse**. Select **Not in market** if the company is not buying. **Clear "not in market"** undoes it.

Check whether a send worked

1. Open **Did it work?** and pick a sent campaign or newsletter. It compares each recipient's stage in the 14 days before and after.

Use the stage in a target group

1. In Segmentation, add a condition from **Buying signals**: **Buying stage**, **In-market score**, **Days in current stage** or **Engaged with topic**.

Statuses

Stage	Meaning
Silent	Nothing recent to go on
Looking	Has shown some interest
Comparing	Asked you for something, or is clearly engaged
Deciding	Asked you for something and is very engaged

Suggested next step: Deciding is Call. Comparing is Follow up or Start a quote. Looking is Add to a campaign.

How it connects

- **Sources:** quotes, deals, three cases on one asset in 90 days, contracts ending within 60 days, "I am interested" leads, and clicks on campaign and newsletter links.
- **Segmentation.** Stage, score, days in stage and topic are conditions for target groups.
- **ABM.** The stage shows beside each program company.
- **Account.** An Account 360 card shows the score and recent signals.
- **Owner alert.** When a company moves up to Comparing or Deciding, the company's owner gets a note on the account. In a Nova workspace it appears in the inbox.
- **Scoring.** Buying signals, the lead score and the account health rating stay separate numbers.

Good to know

- Older signals count for less: full for 14 days, then half, a quarter, an eighth, and gone after 60 days.
- Scores refresh by themselves about every three hours.

- The first run for a workspace sets a baseline and alerts nobody.
- A company with nothing recorded is Silent. Only what is recorded in BPMSquare counts.

11. Leads

What it is

A lead is an enquiry or an interested company that has not yet become a deal. The **Leads** page is the simple list. You add leads by hand, and leads also arrive from forms, from campaign interest buttons and from the Inbox.

Where to find it

Marketing > Leads (`/leads`).

Who uses it and which module switches it on

Sales and marketing. Module: `leads` . The → **Deal** button needs `pipeline` .

How to use it

Add a lead

1. Open **Marketing > Leads** and select **+ New Lead**.
2. Search and pick the **Account**. Type a **Title**, for example "Ring-frame motor burnt, rewind enquiry". Pick the **Source**: Direct, OEM Referral or AMC.
3. Select **Save**.

Find leads

1. Use the status chips (**New**, **Inspecting**, **Quoted**, **Won**, **Lost**) and the search box ("Search lead title or account...").

Turn a lead into a deal

1. On a lead row, select → **Deal**. A deal is created in the Pipeline from the lead and you land on it. The lead becomes **Converted to deal**.

Statuses

Status	Meaning
New	Just arrived
Inspecting	Being looked at
Quoted	A quote was sent
Won	Bought
Lost	Not pursued
Converted to deal	A deal was created from it

Sources shown on the list: OEM Referral, AMC, Direct, Campaign, Form and Inbound. A campaign lead shows the campaign name as a link.

How it connects

- **Accounts.** Every lead belongs to an account.
- **Campaigns and forms.** An interest click or a form submission creates a lead, with the campaign or form recorded as its source.
- **Inbox.** In the Inbox, an email can be turned into a Lead (verify the button wording).
- **Pipeline. → Deal** creates the deal with the lead's title, account and source. If the lead already has a deal, it opens that one.
- **Scored leads.** The same leads are scored and staged there (see the next section). The two lists are two views of the same leads.
- **Change history.** Creating a lead is logged.

Good to know

- Leads added by hand can only have the sources Direct, OEM Referral or AMC. The other sources are set by the product.
- The Leads page shows the simple statuses. The eight stages are on **Scored leads**.
- The Leads page is unchanged by lead scoring.

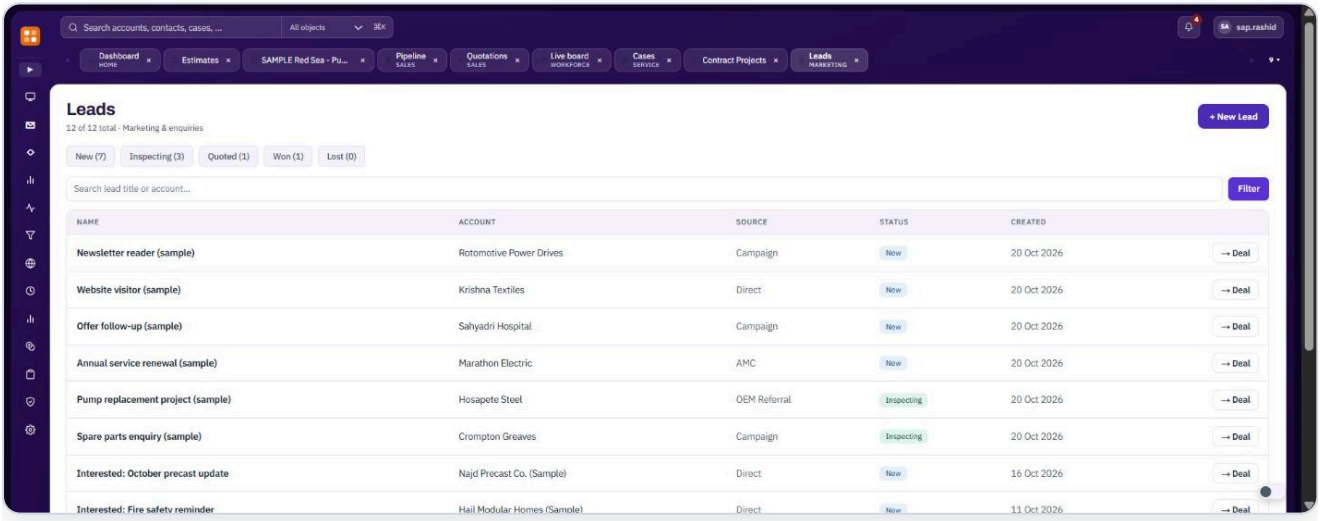


FIGURE 4 The Leads list with status chips and the → Deal button

12. Scored leads

What it is

Scored leads is a second view of leads that adds a score and eight stages. The score is worked out from what the person did (clicked an email, opened a quote, filled in a form) and who they are (their company and role). When it is high enough, the lead becomes **Ready for sales** and goes to a salesperson, who has a deadline to respond. The score comes from fixed rules. It is never an AI guess.

Where to find it

Marketing > Scored leads (`/marketing/leads`). A lead opens at `/marketing/leads/<id>` . The rules are at **Settings > Marketing > Leads** (`/settings/marketing-leads`).

Who uses it and which module switches it on

Salespeople work the leads. Marketing administrators set the rules. Modules: `marketing_scoring` and `leads` (both need `marketing`). Without `marketing_scoring` the page does not exist for your workspace.

How to use it

Set up once (administrator)

1. Open **Settings > Marketing > Leads**, tab **Scoring**. Set **Warm from**, **Hot from** and **Look back (days)**. In **Scoring rules**, click a rule to change **Points**, **Fades over (days)** and **Counts up to (a week)**, or the profile lines (kind of company, country, role).
2. Open **Settings > Coverage** and pick **Who gets new sales-ready leads**: **The team lead** or **Each member in turn**.
3. Open **Settings > Marketing > Leads**, tab **Hand-over**. Set **Working days to pick up a lead**, **Days off**, **When no team covers it, these people take new leads in turn**, and the switches **Tell the owner when a lead is overdue** and **Tell the team lead when a lead is overdue**.
4. Switch on **Make a lead when someone becomes Warm** if you want leads made by themselves. It is off by default.

Work the list (salesperson)

1. Open **Marketing > Scored leads**. The best score is at the top.
2. Use the chips: **All**, a stage, or **Overdue**. Search by lead, company or person.
3. Open a lead. The card **Why 72?** (your number will differ) lists each reason with its points and how many points remain to the next stage.
4. On a **Ready for sales** lead, select **Pick this up**. It becomes yours and moves to **Working**.
5. Use **Stage** to move it, add an optional note, and select **Move to** . Use **Owner** or **Take this lead** to assign it.
6. Select **Score again** to work out the score now.

Statuses

Stage	Meaning
New	Just arrived
Engaged	Showing real interest, not ready for a call
Ready for sales	A salesperson should call now
Working	A salesperson has taken it
Deal	Turned into a deal
Customer	Bought from you
Not now	Not the right time

Stage	Meaning
Not a fit	You will not pursue it

Other labels: **Respond by** (time left), **Overdue** (still Ready for sales and past the deadline), **Needs an owner**, and a note when no team covered the company, so an administrator or the next person on your list took it.

Default scoring: Warm from 20 and Hot from 60. Default points include 10 for clicking a link, 30 for saying they are interested, 20 for opening a quote, 30 for filling in a form, 25 for replying on WhatsApp, 40 for coming to an event, and minus 40 for unsubscribing.

How it connects

- **Events.** Email clicks, quote openings, form submissions, WhatsApp replies and event attendance all add points.
- **Coverage.** The company's team and its assignment mode decide who gets a Ready lead. If no team covers the company, the **Hand-over** list is used, then the oldest administrator.
- **Nova inbox.** An owner is told when a lead becomes Ready, and when it is overdue (each lead once).
- **Leads page.** The same lead appears there with its simple status. A stage move keeps the simple status in step.
- **Segmentation.** Lead score and lead stage are conditions for target groups.
- **Account 360.** A lead card shows on the account.

Good to know

- Scores are refreshed about every 15 minutes, and points fade as actions get older.
- Scoring moves a lead up through New, Engaged and Ready for sales by itself. It never moves it down, and never touches a lead a person has taken on.
- The response clock starts when a lead becomes Ready for sales and stops when it becomes Working.
- Automatic leads only look at what people did after you switched the setting on.
- The how-to guide and some older text call this screen "Lead scores". The menu and page title say "Scored leads".

13. Revenue by source

What it is

Revenue by source shows how many deals, how much open pipeline, how much won revenue and how much money received each campaign, newsletter, form, journey, WhatsApp template or event started or touched. It shows where deals came from. It does not prove why they were won.

Where to find it

Marketing > Revenue by source (`/marketing/attribution`).

Who uses it and which module switches it on

Marketing and sales managers. An administrator can select **Refresh figures**. Module:

`marketing_attribution` (needs `marketing`). The revenue figures need `pipeline` .

How to use it

1. Open **Marketing > Revenue by source**.
2. Under **What to look at**, choose Campaigns, Newsletters, Forms, Journeys, WhatsApp templates or Events.
3. Under **Who gets the credit**, choose **First touch**, **Last touch** or **Shared evenly**.
4. Under **What counts as a touch**, choose **The person did something** (a click, reply, form or registration) or **Also people only sent something**.
5. Read the four figures: **Won, where it started**, **Open, where it started**, **Deals started** and **Deals in all**. Then read the table: Companies, Deals started, Open, Won, Paid, Deals touched and Won touched.
6. Select **Refresh figures** (administrator) to recompute now. The header says when the figures were last updated.
7. To share a view, copy the web address. Every choice is in the address.

Statuses

There is no status. The page uses these terms.

Term	Meaning
Started	The touches before the deal was created share the credit. Started figures add up to one deal per deal, so they can be added
Touched	Every item that touched the deal from 90 days before it was created until it closed. These overlap. Do not add them up
Paid	Money received on invoices raised from the deal's quotes, shared in the same proportion

How it connects

- **Events used:** email clicks and interest, emails sent, form submissions, journey entry, WhatsApp sent, read and replied, and event registration and attendance.
- **Deals** come from the Pipeline. **Paid** comes from invoices made from the deal's quotes. Standard quotes are not invoiced in the product, so they add nothing to Paid.
- Nothing is changed in deals, quotes or invoices. The page only reads them.

Good to know

- The look-back window is fixed at 90 days.
- Figures are recomputed about every three hours.
- A company that clicked may have bought anyway. A deal with no touch may have come from a phone call that is not recorded.
- A WhatsApp dry run reached nobody and is ignored.
- With fewer than 20 deals, read the table as a list, not a rate.
- The page title is "Revenue by source".

14. Consent and unsubscribe

This is not a menu item. It runs through every sender, so it is described once here.

What it is

Consent is a person's recorded "yes, you may contact me about this." Every yes and every no is kept as a record with the date, the channel (email, WhatsApp, SMS or phone), the topic and how it was given. A new answer never erases an old one.

Where to find it

- Rules and topics: **Settings > Marketing > Consent** (`/settings/marketing-consent`).
- One person: **Contacts**, open the person, **Marketing** tab, **Consent** card.
- Bulk: **Data Workbench**, Import or Export, **Consents**.
- Public pages: the unsubscribe page (`/marketing/unsubscribe/<accountId>/<token>`), the preference centre and the confirm page.

Who uses it and which module switches it on

Administrators set the rules. Anyone who edits contacts can record an answer. The settings and the Marketing tab on a contact need `marketing_scoring` or `newsletter_studio` .

How to use it

Set the rules (administrator)

1. Open **Settings > Marketing > Consent**. Choose **Based in** (your country group).
2. Under **Rules by country**, click a country. Under **Without a recorded yes**, choose **Only people who have said yes** (the safe default) or, where allowed, **Also existing customers, about similar products**. Ask your legal adviser before relaxing it.
3. Under **Topics**, click a topic to change its **Name** and **Covers** line. Use **Add a topic** for a new one. A topic people have already answered can be renamed but not removed.
4. Leave **Count newsletter opens** off unless you need it.

Record an answer from a phone call

1. Open the contact, go to the **Marketing** tab and find the **Consent** card.
2. Select **Record consent** or **Record withdrawal**.
3. Pick the **Channel**, the **Consent topic** (or **Any consent topic**) and the **Basis** (**They agreed**, or **Existing customer** where allowed).
4. In **How you got it**, write a sentence, for example "Agreed by phone on 20 Oct". It is required.
5. Select **Save consent**. Nothing is sent to the person.

Bring in a list of people who already agreed

1. Open **Data Workbench**, choose Import, then **Consents**.
2. Use one row per answer. The columns are Email (the person must already be a contact), Channel, Consent topic, Answer (`granted` or `withdrawn`), Basis (`consent` or `existing_customer` , required for granted rows), Date they agreed and Note.

3. An import never creates a contact and never edits an old answer. Rows that cannot be matched are listed as skipped.

Set sending limits (administrator)

1. Open **Settings > Marketing > Consent**, tab **Limits**. Set **Quiet from**, **Quiet until**, **Emails a day, per person**, **WhatsApp messages a week, per person** and **No journey emails on**.

Statuses

State	Meaning
Agreed	They said yes for this channel and topic
Withdrawn	They said no, or asked to stop. Kept as history
Waiting for confirmation	Ticked on a form that needs confirming. Not counted as a yes
Did not confirm	Seven days passed without confirming

Country groups are Saudi Arabia, United Arab Emirates, Qatar, Kuwait, Oman, Bahrain, India, European Union and Everywhere else. Every group starts strict: a person must have said yes. India never allows the existing-customer option.

How it connects

- **Sending.** Newsletters, journeys and WhatsApp ask "may we contact this person, on this channel, about this topic, right now?" at the moment of sending. The most recent answer wins. On a tie, a withdrawal wins. A "do not contact" mark, a suppressed address (bounced or reported as spam) and the company's opt-out flag all refuse email.
- **Forms.** A ticked box records consent with the exact words shown. A preference centre change adds a new answer.
- **WhatsApp.** STOP and START replies update the record.
- **Email health.** A hard bounce or a spam complaint suppresses the address. It is not emailed again until the address is fixed or consent is recorded again.
- **Lead scores.** Unsubscribing takes points off.

Good to know

- **The unsubscribe link opts out the whole company.** In a plain campaign, and in a newsletter sent by a workspace without Forms, the footer **Unsubscribe** opens a page titled "Unsubscribe from marketing emails". Its button sets the company's marketing opt-out. It does not stop quotes, invoices or other account mail. The page waits for the button so that mail scanners cannot unsubscribe someone.
- With Forms on, a newsletter's **Manage preferences** link opens the preference centre, where each person chooses topics or **Unsubscribe from all**. Each change is a new record.
- No screen was found that clears a company's opt-out flag.
- If someone chose **Unsubscribe from all**, only they can come back. They ask you, and you record their consent on the contact.
- A demo workspace redirects all email and WhatsApp, whatever the consent says.

15. Partners

The menu has a **Partners** item (**Master data > Partners**, `/partners` , module `partners`). In this version the page is a placeholder. It is titled "Partners, Marketing · OEM referral sources" and says "Coming in a later slice". It has no records, no buttons and no connections. Do not demonstrate it as a feature.

What exists today that relates to partners:

- An account can have the type **OEM / Vendor**, and Segmentation can filter on it.
- A lead can have the source **OEM Referral**.
- A customer account can store **Referred by** (the OEM account's ID) when it is created.

Common questions

Why did my campaign or newsletter reach fewer people than the audience showed? The audience counts accounts. The send checks each person. People are left out when they have not agreed to the topic, have opted out, have no matching contact, have a bounced address, or would get a language that is not ready. The Send panel lists each reason with a fix. After sending, open the campaign record to see who was skipped and why.

When someone selects Unsubscribe, does the whole company stop? Yes, for the unsubscribe link used in plain campaigns and in newsletters from a workspace without Forms. It sets the company's marketing opt-out. It does not affect quotes or invoices. With Forms on, a newsletter links to the preference centre, where each person chooses topics.

Why can't I see a Marketing menu item? Either the module is not switched on for your workspace, or your business role hides it. Only the BPMSquare team can switch modules on. Your administrator can change business roles.

I sent a WhatsApp template and nothing arrived. Is it broken? No. The only WhatsApp provider built in today is a sandbox. It logs the message and sends nothing. A real provider has to be connected first.

Why did our test email go to a different inbox? A demo workspace always redirects email to one internal inbox, set in **Settings > Integrations > Email output**. The subject starts with "[Redirected · for ...]" and the body names who it was for. This cannot be switched off on a demo workspace.

A lead has a good score but is not Ready for sales. Why? The score is below the **Hot from** line (default 60) in **Settings > Marketing > Leads**, tab **Scoring**. Open the lead and read **Why ?**. It shows how many points remain.

Someone filled in our form but is not in the newsletter audience. Why? They did not tick the consent box, or the form asks for confirmation and they have not pressed the link yet. An unticked box records nothing. Check their Consent card for **Waiting for confirmation**.

Can I send the same campaign again? No. A campaign is sent once. Create a new campaign. Sending a newsletter again with **Send...** creates a new campaign each time.