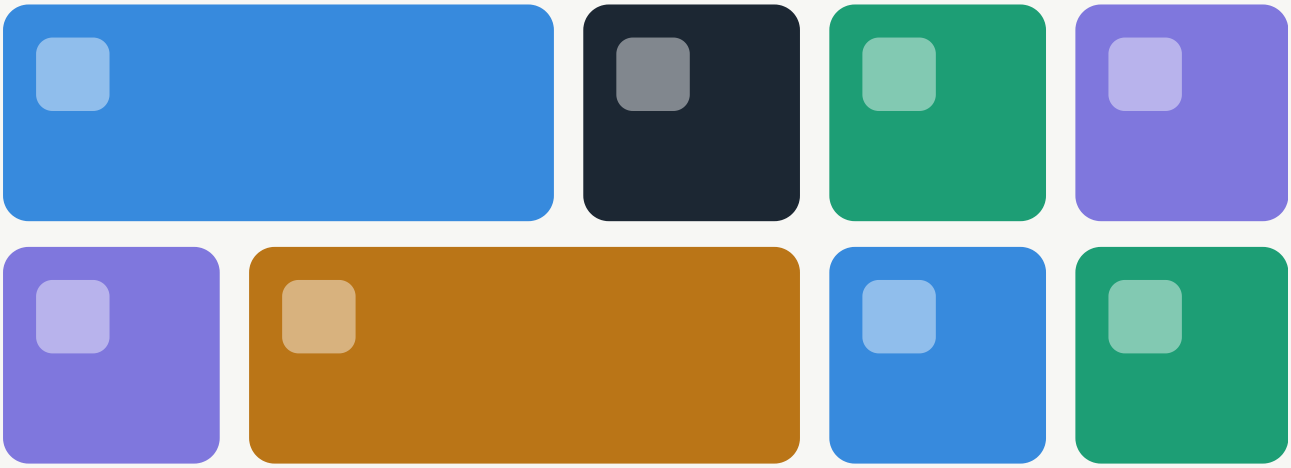
BPMSquare

CUSTOMER EDITION

Solution Guide

How to set up and use BPMSquare for sales and tenders, service, workforce, marketing, the platform and its settings.

New way of customer relationship



Setting up your workspace | Sales and tenders | Service | Workforce (WFM) | Marketing | Platform and master data

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CHAPTER 1

1 Setting up your workspace

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Screen names and button words may be refined as the product improves. If a word on your screen differs slightly, look for the same idea nearby. Items that say “verify” were read from the code but not checked on a live screen.

This guide is for an implementation consultant or a workspace admin who has to set up a workspace and be sure nothing was missed. It is also the one place where every setting of the product is explained. The Sales, Service, Marketing and Workforce chapters do not repeat settings. They point here.

How the three tiers work

Every setting in the product is in exactly one of three tiers. Work through the tiers in order.

Tier	What it means	What to do
Part A. Must have	Without it the workspace will not work: a screen or an action is blocked, or the shipped default is for India and will put wrong figures on records from day one.	Do every A setting that belongs to your modules, before anyone uses the product.
Part B. Nice to have	The product works without it, on a shipped default. It is noticeably better with it.	Do these as time allows. Each one says what you lose if you skip it.
Part C. Optional	Integrations, connectors, webhooks, API keys, email output, and anything only some clients need. Read-only logs are here too.	Do these only when the client asks for them.

How to use the guide:

1. Find your modules in the master checklist below. The **Module** column says who a setting is for. **Core** means every workspace.
2. Do every **A** row for Core and for each of your modules. A workspace that bought only Tenders, or only Workforce, reads only its own A rows.
3. Then work through B and C in the order of "Setup order" at the end. That one numbered run merges all three tiers.
4. Tick each row when its **How to confirm it is done** is true.

Every setting has the same parts: what it controls, where to find it, who can change it, why it is needed (or what you lose if you skip it), how to set it up, the options with their defaults, what it affects elsewhere, a "Check it worked" line, and the screenshot to capture. A setting appears once, in its tier. Where a setting ships with a working default, it says "ships with a default".

Who does what

Who	What they are	What they can do
Platform admin	A member of the BPMSquare team. Not part of your company.	Creates the workspace, switches modules on and off, sets the domain, and invites the first workspace admin. Can enter any workspace for support.
Workspace admin	A person in your company with the role **Admin** in Settings > People.	Reaches every Settings page of the modules you have, plus everything in the product. Business Roles do not limit an admin.
Member	A person in your company with the role **Member**.	Works in the product. What they see depends on their Business Roles. Members do not use the Settings pages, except where noted below.
How the Settings menu works		

Open **Settings** from the sidebar. On a computer, the menu is on the left and the page is on the right. On a phone, the menu is the page.

- The menu is grouped. The groups, in order: **Company**, **Users & access**, **Sales**, **Marketing**, **Service**, **Workforce**, **Data**, **Integrations**, **Appearance**. A group with nothing in it for you is not shown.
- The **Search settings** box at the top finds a page by its name, its description or a keyword. For example "rupee", "logo" or "numbering".
- An entry shows only if the module behind it is on for your workspace. Each setting below names the module it needs.
- Nearly every page is admin only. Most pages edit one draft and have one **Save** button (shown at the top). A line next to it says "Unsaved changes" until you save. Leaving with unsaved changes asks first. Lists that open a side panel (such as Templates, Shifts, Sites, Leave types, Pricing rates and Webhooks) save from the panel instead.
- Explanations are behind a small **i** next to a label. Press or tap it.
- Several Settings pages hold more than one setting, one per tab. This guide splits them by tab, so one page can appear in more than one tier. Each entry says which tab.

- The Service group exists in the menu code but has no pages in it today (see "Service" in Part A).

Who sees what in the menu:

- An **admin** sees every entry the modules allow.
- A **member with a Business Role** gets into Settings only if one of their roles grants Edit on something. The menu then shows just the entries tied to that area. Order types, RFQ, Estimate templates, Workforce and Products are tied to areas this way.
- A **member with no Business Role** is treated as unrestricted, so those entries can show too. In the current code, the page itself still sends a non-admin back to the Settings home.

Master checklist

One row per setting. **Tier** is A (must have), B (nice to have) or C (optional). The ids (A1, B4, C2 ...) are the headings used below.

Id	Setting	Module it is for	Tier	Where	How to confirm it is done
A1	Workspace, modules and domain	Core (platform admin)	A	Admin > Tenants; hosting and DNS	Address opens over https; sidebar shows only the modules bought
A2	First admin and first sign-in	Core	A	Admin > Tenants > the workspace > Users	First sign-in forces a new password; no alias left after hand-over
A3	People (the logins)	Core	A	Settings > Users & access > People	Each person is Active in the list; employees show a login chip
A4	Tax and currency	Core	A	Settings > Company > Company > Tax and currency	A quote or invoice preview shows your currency, tax label and rate
A5	Timezone and weekly off days	Workforce	A	Settings > Workforce > Workforce > Rules	Time Summary judges lateness in local time; weekly off day not absent
A6	Shifts	Workforce	A	Settings > Workforce > Workforce > Shifts	Shift is Active; employee's My Workforce shows it
A7	Sites and their supervisors	Workforce	A	Settings > Workforce > Workforce > Places	No "has no supervisor" line on the Places tab
A8	Leave types	Workforce	A	Settings > Workforce > Workforce > Leave	Leave request form lists the type
A9	Holidays	Workforce	A	Workforce > Leave & Holidays > Holidays	Holiday is in the list and not counted absent on the Time Summary
A10	Employee assignments	Workforce	A	Workforce > Workforce employees	WFM role, Shift, Home site and Supervisor filled for every person
A11	Tender approvers	Tenders (GCC tender deals)	A	Settings > Sales > Tenders	A test bid proposal is approved by an approver

Id	Setting	Module it is for	Tier	Where	How to confirm it is done
A12	Estimate templates	Project Estimator	A	Settings > Sales > Estimate templates	New estimate shows a template card
A13	First inbox channel	Shared Inbox	A	Settings > Integrations > Inbox channels	Channel address copied; test mail appears in the Inbox
A14	Saudi e-invoicing seller details	Saudi e-invoicing	A	Settings > Company > Company > Entities	A draft invoice says Ready and can be sent
B1	Company profile and letterhead	Core	B	Settings > Company > Company > Profile	Print preview shows logo and letterhead
B2	Legal entities	Core (Quotations, Invoices)	B	Settings > Company > Company > Entities	New Quotation offers the entity
B3	Quotation numbering	Sales (Quotations)	B	Settings > Company > Company > Numbering	"Next quotation" shows your format
B4	Business Roles	Core (Business Roles)	B	Settings > Users & access > People > Roles	A test Member sees only the role's areas
B5	Quotation statuses	Sales (Quotations)	B	Settings > Sales > Quotations > Statuses	New quote starts at your starting status
B6	Offer types	Sales (Quotations)	B	Settings > Sales > Quotations > Offer types	New Quotation picker lists the types switched on
B7	Quotation templates	Sales (Quotations)	B	Settings > Sales > Quotations > Templates	Sending a quote email uses your default
B8	Quote print fields	Sales (Assets)	B	Settings > Sales > Quotations > Print	Printed quote shows the ticked fields
B9	Order types	Sales (Sales Orders)	B	Settings > Sales > Order types	New order offers your types and numbers with the prefix
B10	Pricing rate card	Sales (Quotations)	B	Settings > Sales > Pricing	Rate appears in the rate picker
B11	RFQ mail and timing	Sales (RFQ)	B	Settings > Sales > RFQ	Check lines show ready; a test RFQ arrives
B12	Tender pricing defaults	Tenders	B	Settings > Sales > Tenders	Stale price flagged; Award and price starts at your markup
B13	Contract project lists and margin	Tenders (Contract projects)	B	Settings > Sales > Contract projects	Lists show "from a file" or "entered by hand"
B14	Account 360 cards	Sales (Nova or Spectacular)	B	Settings > Sales > Account 360	Drawer shows cards in your order
B15	Coverage	Sales (Coverage)	B	Settings > Users & access > Coverage	New account in a segment gets the team's owner

Id	Setting	Module it is for	Tier	Where	How to confirm it is done
B16	Marketing consent	Marketing	B	Settings > Marketing > Consent	Forms show your topics; no-answer contacts held back
B17	Marketing limits	Marketing (Journeys, WhatsApp)	B	Settings > Marketing > Consent > Limits	Timezone chip shows your zone; journey waits in quiet hours
B18	Lead scoring	Marketing	B	Settings > Marketing > Leads > Scoring	Try on a sample lead gives the expected score
B19	Lead hand-over	Marketing	B	Settings > Marketing > Leads > Hand-over	A Warm lead becomes a lead within 15 minutes
B20	Brand kit	Marketing (Newsletter Studio)	B	Settings > Marketing > Brand kit	Newsletter preview shows your logo, colours, footer
B21	Punch rules	Workforce	B	Settings > Workforce > Workforce > Rules	My Workforce shows the punch types you ticked
B22	Location rule	Workforce	B	Settings > Workforce > Workforce > Places	A test punch away from the site is kept or refused as chosen
B23	Workforce alerts	Workforce	B	Settings > Workforce > Workforce > Alerts	A test correction emails the supervisor
B24	Custom fields	Core	B	Settings > Data > Custom fields	New field shows on the record form
B25	Products (categories, item types)	Core (Products)	B	Settings > Data > Products	Product form offers a category picker
B26	Theme and colour	Core	B	Settings > Appearance > Appearance > Theme	Workspace reloads in the chosen theme
B27	Sidebar menu	Core	B	Settings > Appearance > Appearance > Menu	Hidden item is gone from the sidebar
B28	Dashboard	Core	B	Settings > Appearance > Appearance > Dashboard	Dashboard opens as chosen
C1	Email output	Core	C	Settings > Integrations > Email output	Test email goes to the redirect inbox; later to real recipients
C2	Connectors	Integration	C	Settings > Integrations > Connectors	Tile shows Connected; Test connection passes
C3	Integration middleware	Integration (ERP)	C	Settings > Integrations > Integration middleware	Setup line complete; test quote has an ERP number
C4	Webhooks	Integration (Webhooks library)	C	Settings > Integrations > Webhooks	Test tab sends; Log shows the answer
C5	Webhooks and push	Integration	C	Settings > Integrations > Webhooks & push	Push to ERP accepted by the receiver

Id	Setting	Module it is for	Tier	Where	How to confirm it is done
C6	API keys and developer	Integration	C	Settings > Integrations > API keys & developer	Call to /api/v1 with the key returns your data
C7	Account 360 external sources	Sales (Nova or Spectacular)	C	Settings > Sales > Account 360 > External sources	Card appears with an external value
C8	Single sign-on (Coming soon)	Core	C	Settings > Users & access > Single sign-on	Page shows Coming soon
C9	Face, passkey and door tablets	Workforce	C	Settings > Workforce > Workforce > Rules > More; Places	Tablet registered; a punch at it is recorded
C10	Project billing	Workforce (Project Costing, Invoices)	C	Settings > Workforce > Workforce > Billing	Billing preview shows a non-zero amount
C11	Deleted records (log, no settings)	Core	C	Settings > Data > Deleted records	Log lists permanent deletions
C12	Audit and users hub (no settings)	Core (Administration hub)	C	Audit & Users	Cards open
C13	Change history (log, no settings)	Core (Change History)	C	Audit & Users > Change History	Your setup changes are listed
C14	Outbound emails (log, no settings)	Core (Outbound Emails)	C	Audit & Users > Outbound Emails	Test sends are listed

Part A. Must have

Without these the workspace will not work. The rule for this part is strict. A setting is here only for one of two reasons:

- **It blocks something.** Skip it and a screen shows an empty state or a refusal, or an action is stopped. The entry names the screen and the message.
- **Its shipped default is for India and wrong for most Gulf workspaces.** Nothing refuses, but every record is stamped with the wrong figure from day one (currency and tax, timezone, weekly off days, holidays). The entry says "ships with a default" and explains why it is here anyway.

If the product ships a working default, the setting is in Part B. Do the Core entries first, then only the modules your workspace bought.

A.1 Core (every workspace)

A1 Workspace, modules and domain

Module: Core. **Done by:** the BPMSquare team (platform admin), not by your admin.

WHAT IT CONTROLS	The workspace itself: its name, permanent short code, the address people sign in at, accent colour, currency, plan, first admin and which modules are switched on.
WHERE TO FIND IT	Admin > Tenants > New (or the Tenant Creation Studio at `/admin/tenant-studio`, which drafts the whole plan from a plain description). Then the hosting project, the DNS provider and the sign-in redirect list.
WHO CAN CHANGE IT	Platform admin only. Only the platform admin can switch a module on. Your admin cannot. If a Settings page in this guide is missing from your menu, the module behind it is not switched on for your workspace. Ask the BPMSquare team. Some flags are for the platform admin only, because they open work that is still being proven. Examples are the Nova theme, the Enterprise and Spectacular themes, Integration middleware, the Webhooks library, Shared Inbox, Sales Orders, GCC tender deals and the marketing programs. Your admin cannot turn these on.
WHY IT IS NEEDED	The product finds a workspace by the address typed in the browser. A new address opens nothing until it is wired. A module that is not switched on has no sidebar item and no Settings page.
IF YOU SKIP IT	• No domain wiring: the address does not open at all (the browser shows DNS_PROBE_FINISHED_NXDOMAIN). • Signing in while the certificate still says "Generating SSL Certificate": the site loads over plain HTTP, the session cookie is secure-only so the sign-in does not stick, and the password would travel unencrypted. • No entry in the sign-in redirect list: forgot-password emails bounce to the wrong workspace's address, where the person has no membership. It looks like "password reset loops". • A module left off: its sidebar items and Settings pages simply do not exist. For Workforce, Business Roles must be on as well (employee master, Business Users and the automatic Workforce roles need it).
HOW TO SET IT UP	1. Decide before you touch anything: shared database (the default) or a dedicated instance; the module package; the currency (it relabels figures and never converts them, so settle it before any data is loaded); and the provisioning admin email (see A2). 2. Create the workspace in Admin > Tenants > New: **Name**, **short code** (lowercase, permanent), **custom domain** (required, for example `‹code›.bpmsquare.com`), **accent colour**, **currency**, **plan**, the first admin's alias email and initial password, and the modules. 3. Modules. The form pre-ticks the eleven core CRM modules, so a scoped workspace must untick the ones not sold. A Workforce-only package is `wfm`, `business_roles`, `administration`, `reports` (recommended),

`data_workbench` (needed for bulk employee upload) and optionally `change_history` . A full CRM package is the form's defaults plus whatever optional modules were sold. Experimental flags (Nova, Enterprise, Spectacular) are set by hand only.

4. In the hosting project (bpmsquare-app), open Settings > Domains > Add Existing and add `‹code›.bpmsquare.com` .
5. At the DNS provider, add a CNAME: name `‹code›` , target `cname.vercel-dns.com` . Wait until the row shows **Valid Configuration**.
6. In the authentication settings, open URL Configuration and add the redirect URL `https://‹code›.bpmsquare.com/**` . The one-time wildcard `https://*.bpmsquare.com/**` covers every future workspace.

CHECK IT WORKED

The address opens over https. The first admin can sign in (A2). The sidebar shows only the modules bought. The Settings menu has no pages for absent modules. Global search lists only your objects. The dashboard starts nearly empty for a scoped workspace, which is correct: use **Adapt** on the dashboard to install the module's widgets.

A2 First admin and first sign-in

Module: Core. **Done by:** the BPMSquare team creates it; your admin completes the first sign-in.

WHAT IT CONTROLS

The one login that can configure everything else.

WHERE TO FIND IT

Admin > Tenants > the workspace > Users > Invite (platform admin). The first sign-in is at the workspace address.

WHO CAN CHANGE IT

Platform admin creates it. After that, your admin manages people in People (A3).

The platform admin creates the workspace and invites the first admin (Admin > Tenants > the workspace > Users > Invite). That invite exists for the first admin only. It gives the client's first admin system access, once. Everything after that happens inside your workspace, in **Settings > Users & access > People**, never from the platform admin screens. When you name your own admin, add them in People, then remove the provisioning alias login and any plain-email login the platform admin used during setup. The platform admin can always re-enter for support.

WHY IT IS NEEDED

Nothing else in this guide can be done without an admin who can sign in.

IF YOU SKIP IT, OR DO IT WRONG

If the invite uses the operator's plain email and that email already has an account anywhere on the platform, the account is linked and **its own password stays**. The password typed at creation is silently ignored. A plain-email login "working"

proves nothing either, because platform admins are admitted to any workspace automatically.

HOW TO SET IT UP

1. Use a plus-alias of the operator's address as the provisioning admin email, for example `<operator>+ ‹code›@gmail.com` . It makes a genuinely new login, and mail still lands in the operator's inbox.
2. Give an initial password at creation. It is shown once, in the result, and stored nowhere.
3. The first admin signs in at the workspace address with the alias and the initial password, and is sent to a screen to choose a new password before anything else loads.
4. When the client names their own admin, add them in People as **Admin**, then remove the provisioning alias and any plain-email login (see the last steps of "Setup order").

CHECK IT WORKED

The first sign-in shows the choose-a-new-password screen, then the dashboard. Later, People lists your own admin as Admin and no alias.

A3 People (the logins)

Module: Core (the Business Roles tick list needs the module Business Roles).

WHAT IT CONTROLS

Everyone who can sign in to the workspace: whether each is an Admin or a Member, which Business Roles a Member has, who is locked, and when each login is valid. **People are business users (logins). Employees are records.** The People screen replaced three older screens: Settings > Team, Administration > Business users and Administration > Business roles.

WHERE TO FIND IT

Settings > Users & access > People. URL: `/settings/people` . A person's panel remembers its section in the address (`?ptab=validity` , `?ptab=changes`). From an employee, Employees (`/employees`) links here.

WHO CAN CHANGE IT

Admin only. The People tab is always shown. The **Changes** section needs the module **Change History**.

The People page has an **i** tip: "People who can sign in. Add someone from their employee record, or here directly." The People table has an **Employee** column: the linked employee's name, or a dash. It shows when Business Roles is on and is hidden on narrow screens.

WHY IT IS NEEDED

Until you add people, the only login is the first admin. A Workforce employee with no login cannot open My Workforce to punch (unless the workspace punches only at a door tablet). A Member cannot be given a Business Role until the login exists.

IF YOU SKIP IT

Nobody except the first admin can sign in. Employees do not appear with a login chip, and the Employees list keeps showing **Create login** on their rows.

Employees are records, People are logins.

Two lists, two jobs:

- **Employees** (sidebar > Master data > Employees) hold the **records**: code, name, email, department, validity dates and, with Workforce, the Workforce role and supervisor. The Employees list has no subtitle. Its **i** tip reads: "Everyone you track. A login is optional and is created from the row."
- **People** (Settings > Users & access > People) hold the **business users**: the logins, with their role, Business Roles, lock and validity.

A login can be tied to an employee. There are two routes to add one, described under How to set it up below. The employee route comes first because it carries the employee's code, email and dates across for you. The direct Invite in People is the shortcut for people who are not employees, such as a second admin.

HOW TO SET IT UP

Route 1, employee first (the usual way for staff)

1. Open **Employees** in the sidebar (Master data). Add the employee if there is no record yet. Employee codes are made by the system.
2. For Workforce, set the **WFM role** (supervisor or employee) and, for employees, the **Supervisor**. That decides who approves corrections, leave and overtime.
3. On the employee's row press **Create login**. In the employee's Edit dialog the same action reads **Create business user**. Once a login exists, the row shows a chip with its state (Active, Locked, Outside validity) that opens that person in People.
4. The Add panel opens with the employee, the email and the validity dates already filled in. Choose the **Role** (Admin or Member). Type a **Password** (required, because no invite email is sent). Press **Add**.
5. The result shows the sign-in details with **Copy details**. Hand them over. The person must choose a new password at first sign-in. The matching "WFM Supervisor" or "WFM Employee" Business Role attaches automatically.

Route 2, direct Invite (the shortcut for people who are not employees)

1. In Settings > People press **Invite**.
2. Type the **Email**. The **Role** (Member or Admin) is always shown. Pick it.
3. Either leave **Password** empty and press **Send invite** (the person gets an email whose link opens a set- password screen), or type a **Password** of at least 8 characters and press **Add** (the sign-in details are shown to hand over, and the first sign-in forces a new password).
4. Optionally pick an **Employee** in the same panel. Only an employee without a login is listed. The email and the **Validity** line fill in from the record.

The panel button reads **Send invite** until you set a password or pick an employee. Then it reads **Add**.

Open a person

1. Click the person's row. A panel opens.
2. At the top are the actions: **Lock** (or **Unlock**), **Reset password** and **Remove**. For Reset password, type the new password and press **Set password**.
3. The sections are:
   - **Access rights**: the workspace **Role** (Member or Admin). For a Member, tick the **Business roles**. Each one shows its areas in one line.
   - **Validity** (when the person has a login): **Valid from**, **Valid to**, **Counted user**. Under **More**: **Display name** and, if the login has no employee yet, **Employee**.
   - **Changes**: the history of this login, newest first. A few rows, then **Show all**.
4. Press **Save** to keep edits to the role, Business roles and Validity. Lock, Reset password and Remove act at once.

Bulk For many staff at once, use the Data Workbench: import the Employees sheet, export to get the codes, then import the Users sheet (email, employee code, role name). Temporary passwords are generated and returned in the import report. Never put passwords in a spreadsheet. Details are in the Data Workbench chapter.

Locking and validity dates.

On a person in Settings > People:

- **Lock** stops the person entering the workspace. **Unlock** brings them back. Their login is not deleted. The panel and the list show the state: Active, Locked or Outside validity.
- **Valid from** and **Valid to** (the Validity section) set the dates the login works. Outside those dates the person is treated as locked. Leave both empty for no limit. A login made from an employee copies the employee's dates.
- You cannot lock yourself, and you cannot set your own dates to exclude today.
- You cannot change your own role. On your own row the **Member** option is disabled, and the server refuses it with 400 "You can't change your own role".
- **Counted user** says the person takes one licence seat. It is on by default.
- **Remove** takes the person out of the workspace. It does not delete their login. Removing yourself is refused.
- Every one of these changes is recorded (see "Every access change is logged" below).

Passwords and the forced password change.

- **Every path that creates a new login with an initial password forces a change.** The first sign-in sends the person to a screen where they choose their own password before anything else loads. This covers: the Add panel in People (Invite), Employees > Create login, the Data Workbench Users import

(temporary passwords are generated and returned in the import report), and the BPMSquare team's invite of the first admin.

- **Reset password** on a person sets a new password you choose and forces the same change at their next sign-in.
- If the email already has an account anywhere on the platform, the account is **linked** and **its own password stays**. The password you typed is ignored. The person is not forced to change anything.
- If no password is given, an invite email is sent. Its link lands on a set-password screen.
- After an add or a reset, the screen shows the sign-in address, the email and the password with a **Copy details** button, and the line "They will be asked to choose a new password at first sign-in." The password is not shown again. Pass it on in person.

Every access change is logged.

Creating a login, removing it, changing the role or the Business Roles, locking and unlocking, resetting a password, and changing validity dates are all written to Change History under the object **People and access**. The row shows who did it and when. A password is never shown: a reset appears as "reset: changes at next sign-in". The same history shows on the person's **Changes** section (needs the Change History module). A removed login keeps its history.

OPTIONS

Option	What it does	Default
Email	The login name.	Required
Role	Admin: all settings and no role limits. Member: reaches what Business Roles allow. Always shown, on every route.	Member
Password (Add panel)	Empty sends an invite email. Filled sets the password now (minimum 8 characters). Required when an employee is picked. If the email already has an account, it is linked and the password is ignored.	Empty
Employee (Add panel)	Ties the login to an employee record and copies the name and validity dates.	None, or the employee you started from
Lock / Unlock	Locks or unlocks the login at once.	Unlocked
Reset password	Sets a new password now. The person must choose their own at next sign-in. Minimum 8 characters.	Not set
Remove	Takes the person out of the workspace. The login is not deleted.	Not applicable
Business roles	The roles that decide which screens a Member sees. With none picked, the Member keeps full access.	None

Option	What it does	Default
Valid from, Valid to	The dates the login works.	Empty (no limit), or the employee's dates
Counted user	Takes one licence seat.	On
Display name	The name shown in lists.	Email or employee name
Employee (person, under More)	Links a login to an employee afterwards. Only an unlinked employee can be picked.	Not linked

WHAT IT AFFECTS ELSEWHERE

- Who can sign in at all (lock, validity).
- The sidebar and the Settings menu for each Member, the dashboards they open, and the page guards that send them back to the dashboard.
- Employees: the row shows the login state or a Create login button.
- Change History: the object "People and access" (Change history, C13).
- The Inbox channel "Team" choice (it lists Business Roles, see Inbox channels, A13).
- Workforce: an employee's login and the supervisor routing. Whether choosing an employee who is a Workforce supervisor still defaults the role to Admin when no role is sent. The Add panel always sends the role you pick, so on screen the choice is yours.

CHECK IT WORKED

The new person is in the People list with the state **Active**. For an employee login, the Employees row shows a chip with the login state instead of **Create login**. The person's first sign-in asks for a new password. Their panel's **Changes** section shows the creation.

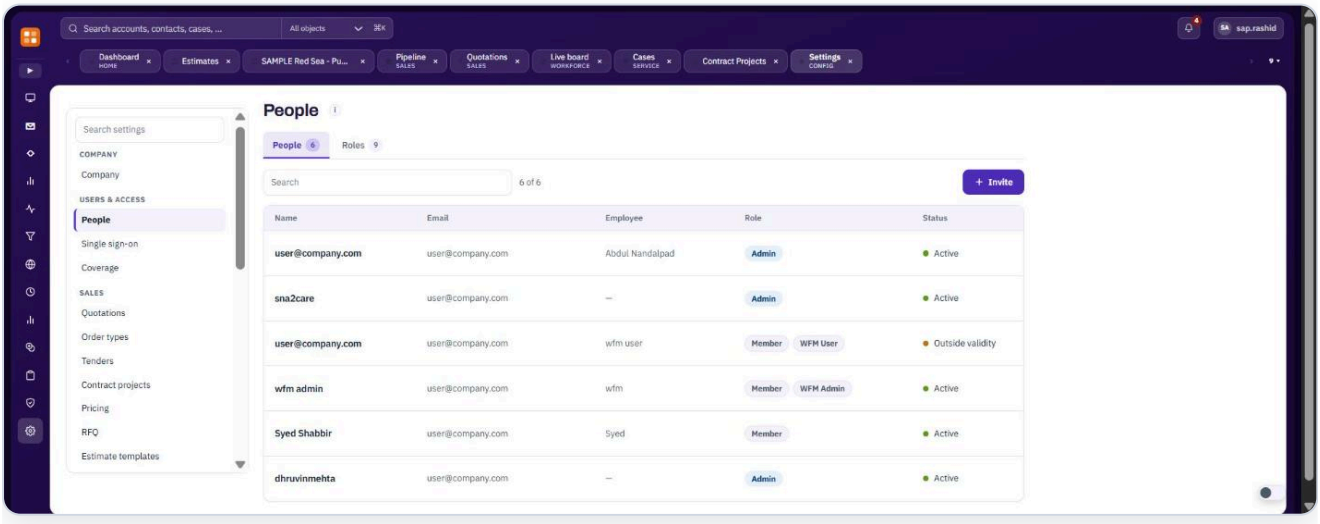


FIGURE 1 The People table with the Invite button and the search box.

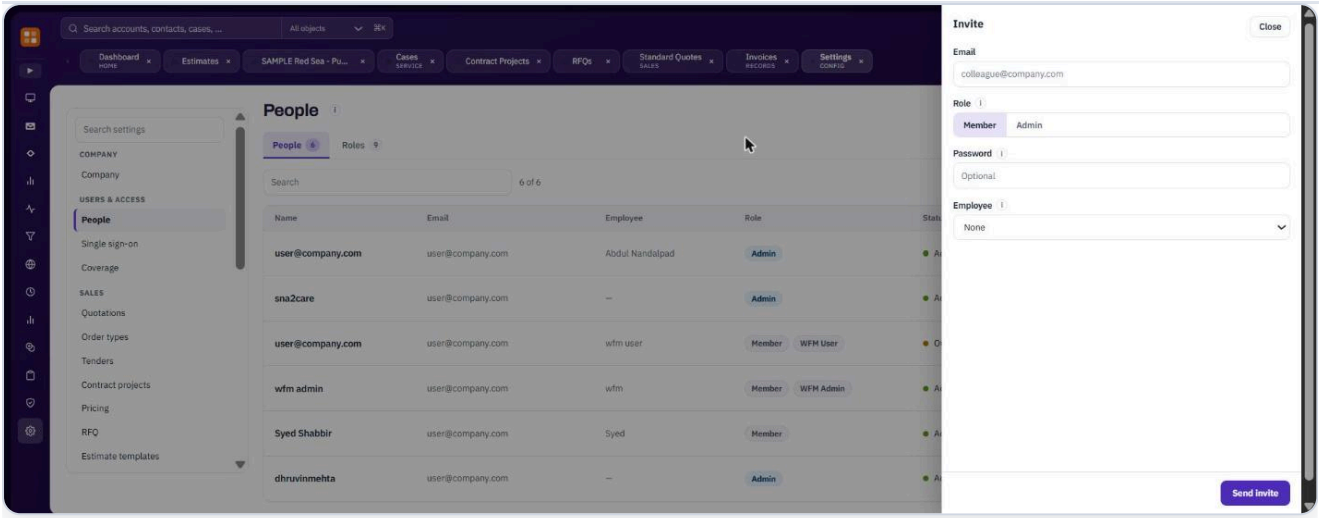


FIGURE 2 The Invite panel open, showing Email, Role, Password and Employee.

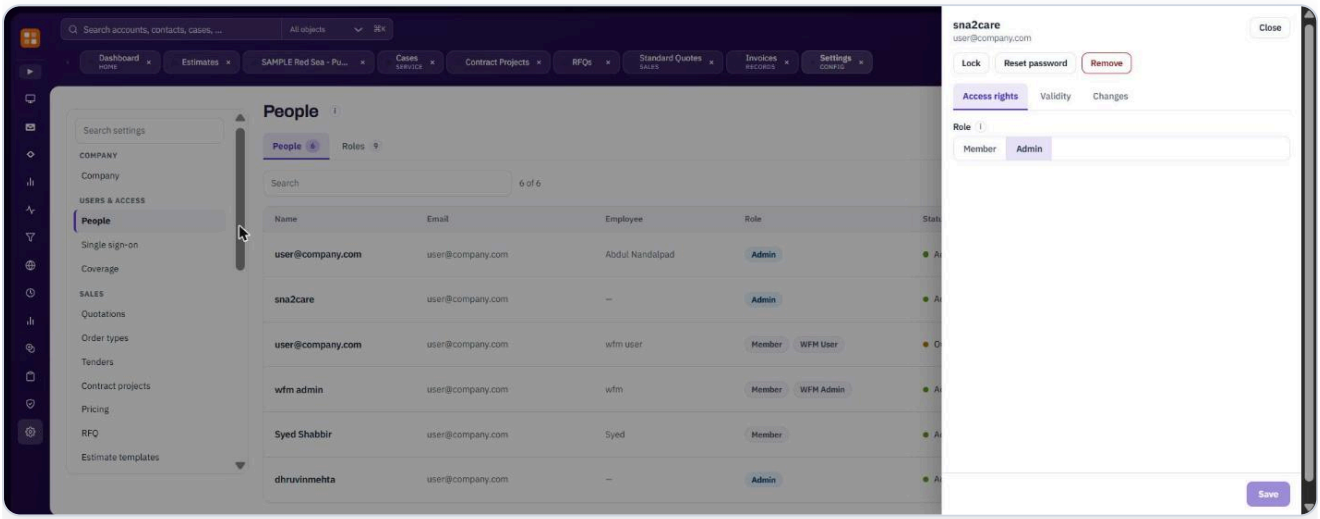


FIGURE 3 A person's panel open: Lock, Reset password and Remove at the top, then the Access rights section.

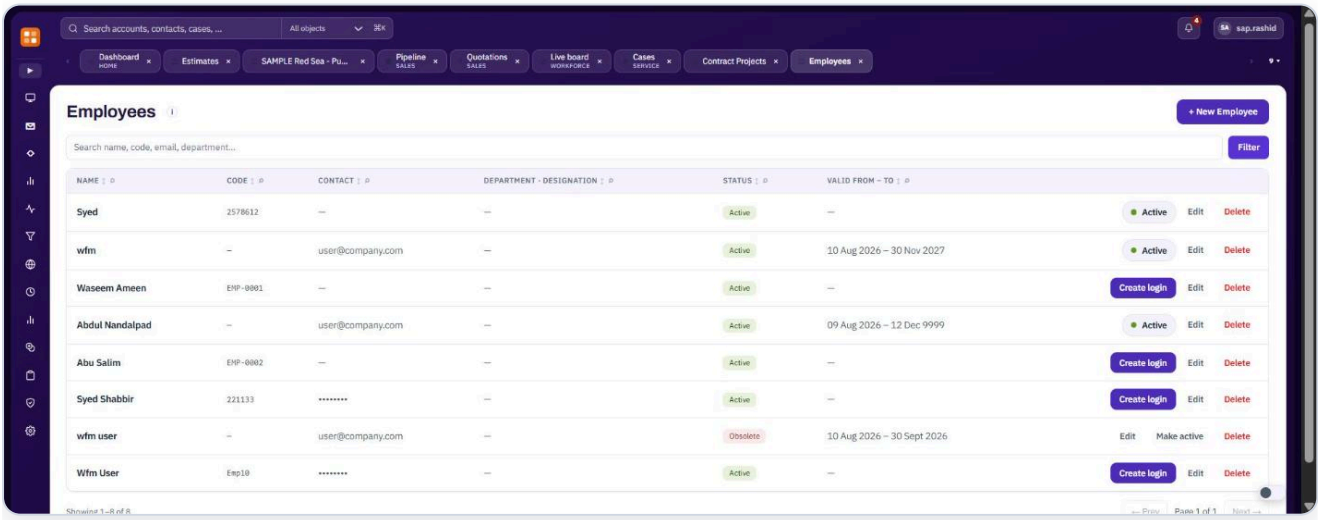


FIGURE 4 The Employees list with a Create login button on one row and a login chip on another.

A4 Tax and currency

Module: Core. Currency is shown to every workspace. The tax label, rate and "Rates include tax" appear only if the workspace has Quotations, Invoices or Standard Quotes.

WHAT IT CONTROLS

The currency every amount is shown in, printed in and emailed in, and the tax line on quotations, standard quotes and invoices.

WHERE TO FIND IT

Settings > Company > Company > **Tax and currency** tab. URL: `/settings/company?tab=tax` . The old address `/settings/currency` opens the same tab.

WHO CAN CHANGE IT

Admin only. No module flag.

WHY IT IS NEEDED

The setting **ships with a default** (INR, tax label GST, rate 18, rates exclude tax), so nothing is blocked. It is here because the default is India's. Every figure and every printed document carries it.

IF YOU SKIP IT

A Gulf workspace shows INR-formatted amounts on every screen, PDF, email and API answer, and an 18 percent "GST" line on printed quotations and invoices. The currency only relabels figures. It does not convert them, so a currency changed after data is loaded relabels the old figures too. Saudi e-invoicing also needs SAR (see A14).

HOW TO SET IT UP

1. Open the **Tax and currency** tab.
2. Pick the **Currency**. For a workspace that prints documents, set **Tax label** (for example VAT), **Rate (%)** and **Rates include tax**.
3. Press **Save**. The documents update at once.

OPTIONS

Option	What it does	Default
Currency	How every amount is shown, printed and emailed. It relabels figures. It does not convert them. Choices: INR, QAR, AED, SAR, OMR, KWD, BHD, USD, EUR, GBP.	INR
Tax label	The word beside the tax line, such as GST, VAT or MwSt.	GST
Rate (%)	The tax rate, 0 to 100.	18
Rates include tax	On when your rates already include tax. Off adds tax on top.	Off

WHAT IT AFFECTS ELSEWHERE

- Every money figure on screens, PDFs, emails and the API.
- Every printed or emailed quotation, standard quote and invoice (the tax line).
- Change the currency before you load data. It relabels, it does not convert.

	• Change History records the currency change.
CHECK IT WORKED	Open a quotation or an invoice (or its print preview). The amounts show your currency and the tax line shows your label and rate.

A.2 Workforce

Everything in this block is on one page: Settings > Workforce > Workforce (`/settings/workforce`). It replaced eight older pages (Attendance rules, Shifts, Sites, Leave types, Punching & verification, Kiosks, Reminders & notifications, Employment & billing). The settings below are split by tab; the other tabs are in Part B and Part C.

Who can change it. Admin only. Needs the module **Workforce (wfm)**.

How the page saves: Rules, Places (the location rule), Leave (carry forward), Alerts and Billing save together with the **Save** button at the top. Shifts, sites and leave types save from their own panel.

Order. Work through the settings in this order, the same order the provisioning runbook uses: timezone, then shifts, then sites, then leave types, then holidays, then the employee assignments. The runbook says punching works only once a site and a shift exist and are assigned. The code is more precise (see the "If you skip it" lines): a punch is recorded without them, but nobody can be marked late or absent and no location is checked (verify against a live workspace).

A5 Timezone and weekly off days

Module: Workforce.

WHAT IT CONTROLS	The time zone that lateness, shift days and absences are worked out in, and the days of the week that are not working days.
WHERE TO FIND IT	Settings > Workforce > Workforce > **Rules** tab. URL: `/settings/workforce` .
WHY IT IS NEEDED	It **ships with a default** (Asia/Kolkata, Sunday off), so nothing is blocked. It is here because the default is India's. Every late mark and every absence is judged in this zone, on these days.
IF YOU SKIP IT	A Gulf workspace has its punches judged in Indian time, so people look late or early by the difference between the two zones. Friday and Saturday are treated as working days, so staff who are off are marked absent. The same timezone also sets the quiet hours of marketing journeys (see Marketing limits, B17).
HOW TO SET IT UP	1 Open **Rules**. Pick the **Timezone** of your site. 2 Tick the **Weekly off days**. For a Friday and Saturday weekend, tick both and untick Sunday. 3 Press **Save**.

OPTIONS

Option	What it does	Default
Timezone	Lateness, shift days and absences are worked out in this zone.	Asia/Kolkata
Weekly off days	No lateness or absence is marked on these days or on holidays.	Sunday

WHAT IT AFFECTS ELSEWHERE

My Workforce (punching), the Roster, the Monthly Summary and the CA Excel export, and Marketing journeys (quiet hours).

CHECK IT WORKED

On the Time Summary, a day of punches shows lateness against the shift in local time, and a weekly off day is not marked absent.

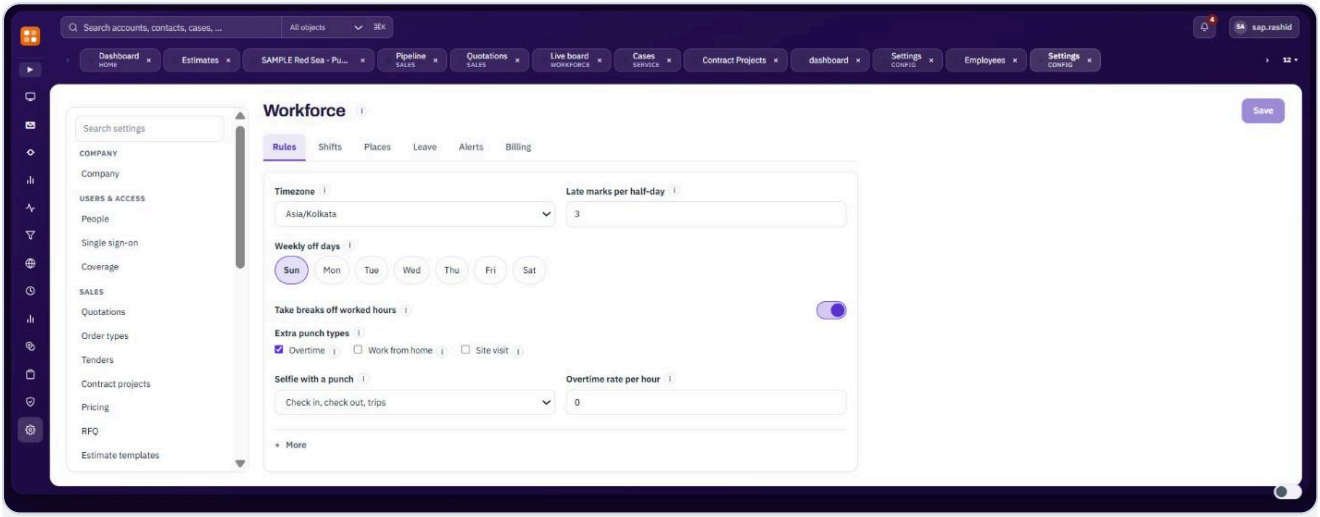


FIGURE 5 Rules tab with the six everyday fields and More closed.

A6 Shifts

Module: Workforce.

WHAT IT CONTROLS

The working times people are measured against.

WHERE TO FIND IT

Settings > Workforce > Workforce > **Shifts** tab. URL: `/settings/workforce?tab=shifts` .

WHY IT IS NEEDED

Lateness and absence are measured against a shift.

IF YOU SKIP IT

The Shifts tab says "No shifts yet. Without one, nobody can be marked late or absent." My Workforce shows an employee "No shift assigned yet — ask your supervisor." The summaries have no late marks or absences.

HOW TO SET IT UP

1. Open **Shifts**. Press **+ New shift**.

2. Set **Name**, **Start** and **End** (a new shift offers 09:00 to 18:00), **Grace (minutes)** (10 is offered), and **Night shift** only if the shift pays the night allowance.
3. Press **Save** in the panel. Then give each employee the shift (A10), or plan it in the Roster.

OPTIONS

Option	What it does	Default
Name, Start, End	The shift.	New shift: 09:00 to 18:00
Grace (minutes)	How late someone can check in before it counts as a late mark.	10
Night shift	Pays the night allowance. A shift that ends after midnight is recognised from its start and end times, whatever this switch says. Shows a night allowance amount.	Off, allowance 0
Active	Switch off to retire a shift.	On

CHECK IT WORKED

The shift is in the table and Active. An employee's My Workforce shows the shift name.

A7 Sites and their supervisors

Module: Workforce.

WHAT IT CONTROLS

The places people punch in at, how near the pin counts as on site, and who approves overtime, leave and corrections for each site.

WHERE TO FIND IT

Settings > Workforce > Workforce > **Places** tab. URL: `/settings/workforce?tab=places` .

WHY IT IS NEEDED

The site is where the supervisor routing comes from, and where the location check measures against.

IF YOU SKIP IT

- No site at all: the Places tab says "No sites yet. Until one exists, punches are recorded without a location check."
- A site with no supervisor: an amber line on the Places tab says "N sites have no supervisor" and names the sites whose overtime, leave and corrections have nobody to approve them. A supervisor who is not a workspace admin is refused with " has no supervisor or approver assigned — set one in Settings → Workforce → Sites."
- An employee with no home site: the approver is refused with "That employee isn't assigned to any site, so nobody supervises them — set their site first."
- A workspace Admin can approve for anyone. Nobody can approve their own request: "You can't approve your own request — it goes to your manager."

HOW TO SET IT UP

1. Open **Places**. Press **+ New site**.
2. Type a **Name**. Click the map for the **Location** (or type latitude and longitude under More). Pick the **Supervisor**. Set the **Radius (m)** (150 is offered). Add **Also approve here** people so nothing waits when one person is away.
3. Press **Save** in the panel. Then give each employee a home site (A10).

OPTIONS

Option	What it does	Default
Site: Name, Location	A place people punch in at. Click the map, or type latitude and longitude under More.	Empty
Site: Supervisor	Approves overtime, leave and corrections for this site.	None
Site: Radius (m)	How far from the pin still counts as on site.	150
Site: Also approve here	Extra approvers, so nothing waits when one person is away.	None
Site: Active	Switch off to retire a site.	On

WHAT IT AFFECTS ELSEWHERE

Where the app lets people punch (with the location rule, B22), and which queue an employee's requests land in.

CHECK IT WORKED

The site shows on the table with its supervisor and no amber "has no supervisor" line is left on the Places tab.

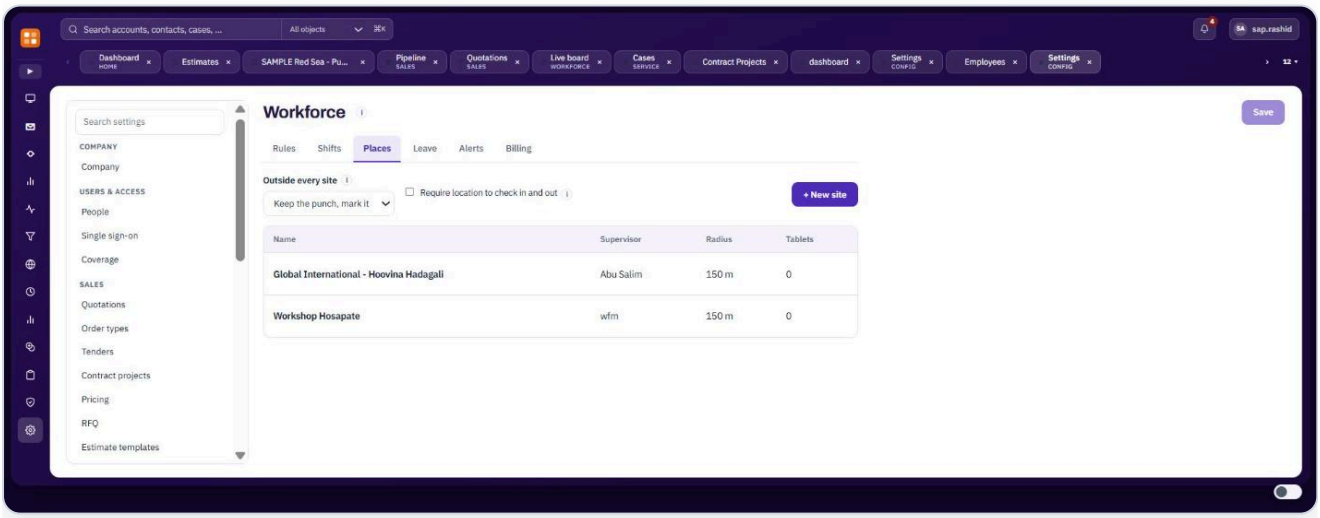


FIGURE 6 Places tab with the location rule and the sites table.

A8 Leave types

Module: Workforce.

WHAT IT CONTROLS	The kinds of leave people can ask for, and their quotas.
WHERE TO FIND IT	Settings > Workforce > Workforce > **Leave** tab. URL: `/settings/workforce?tab=leave` .
WHY IT IS NEEDED	A leave request must name a leave type.
IF YOU SKIP IT	The Leave tab says "No leave types yet. Until one exists, nobody can request leave." In My Workforce an employee sees "No leave types configured yet — ask your admin to set them up in Settings → Workforce → Leave Types." The request form refuses with "Please choose a leave type".

HOW TO SET IT UP

1. Open **Leave**. Press **+ New leave type**.
2. Set **Name**, **Category** (Paid, Unpaid or Half-day), **Days** and **Per** (Month or Year). A monthly quota is also the most anyone can take in that month. Open **More** to cap days in a month or to fix how many days a month are paid.
3. Decide **Unused leave carries forward** (it lapses at year end by default). Press **Save** at the top for that switch; the leave type itself saves from its panel.

OPTIONS

Option	What it does	Default
Unused leave carries forward	On: unused leave carries into next year. Off: it lapses at year end.	Off
Leave type: Name, Category	Paid, Unpaid or Half-day.	Paid
Leave type: Days, Per	The default quota per employee. A monthly quota is also the most anyone can take in that month. Per Month or Year.	1 per Month
More: Most days in a month	Cap in one calendar month. Empty means no cap.	No cap
More: Paid days a month	The first N days a month are paid and later ones count as unpaid in the summary. Empty means the category decides.	All
Active	Switch off to retire a type.	On

CHECK IT WORKED The type is in the table and Active. An employee's leave request form lists it.

A9 Holidays

Module: Workforce. **Not in Settings.** Holidays are kept on the Leave & Holidays screen in the Workforce area (`/wfm/leave`), next to leave requests.

WHAT IT CONTROLS	The dates on which nobody is expected to work.
WHERE TO FIND IT	Workforce > Leave & Holidays > **Holidays** tab. URL: `/wfm/leave` .
WHO CAN CHANGE IT	Supervisors and admins (the screen is a supervisor item in the Workforce menu).
WHY IT IS NEEDED	The Monthly Summary judges lateness and absence only on days that are not a holiday, a leave day or a weekly off day.
IF YOU SKIP IT	The Holidays tab says "No holidays configured." A public holiday is treated as a working day, so every employee with no punches that day is counted absent, and the CA Excel export carries it.
HOW TO SET IT UP	1. Open the **Holidays** tab. Under **Add a holiday**, set **Date**, **Name** (for example Independence Day) and **Applies to** (Everyone, Full-time only, or Contractors only). 2. Press **Add holiday**. 3. For a whole year, press **Download template**, fill it, and upload it. The result says how many holidays were added or updated.
CHECK IT WORKED	The holiday is in the list. The Time Summary shows the holiday against that date and does not mark anyone absent.

A10 Employee assignments (Workforce role, shift, home site, supervisor)

Module: Workforce. **Not in Settings.** This is done on the Workforce employees screen.

WHAT IT CONTROLS	For each employee: whether they are a supervisor or an employee, which shift they work, which site they belong to, and who supervises them.
WHERE TO FIND IT	Workforce > Workforce employees. URL: `/wfm/employees` . Bulk: the Roster matrix, or Data Workbench (Employees, then Users).
WHO CAN CHANGE IT	Supervisors and admins.
WHY IT IS NEEDED	The shift and the home site decide whose queue an employee's corrections, leave and overtime requests land in. The employee must also have a login (A3) to punch from a phone.
IF YOU SKIP IT	The employee sees "No shift assigned yet — ask your supervisor." Their requests have no queue to land in (see A7 for the messages an approver gets).

HOW TO SET IT UP	1. Add the employee in Employees (the code EMP-#### is made by the system and never typed). 2. Open Workforce employees. For each person set **WFM role** (Supervisor or Employee), **Shift**, **Home site** and **Supervisor**. 3. Give the login: on the employee's row press **Create login** (see A3). The matching "WFM Supervisor" or "WFM Employee" Business Role attaches automatically.
CHECK IT WORKED	The Workforce employees table shows the WFM role, Shift, Home site and Supervisor columns filled for every person.

A.3 Tenders and contract projects

A11 Tender approvers

Module: Tenders (**GCC tender deals**). The same list also approves Contract project budgets and variations (needs **Contract projects**).

WHAT IT CONTROLS	Who approves a bid or no-bid proposal on a tender deal, and whether a proposer may approve their own.
WHERE TO FIND IT	Settings > Sales > Tenders. URL: `/settings/tenders` .
WHO CAN CHANGE IT	Admin only.
WHY IT IS NEEDED	A bid or no-bid proposal, a project budget and a variation each wait for an approver who is not the proposer.
IF YOU SKIP IT	It **ships with a default** (every workspace admin approves; self-approval off), which works when there are two or more admins. In a **one-admin workspace** the only approver is also the proposer, so the approval is refused with "You cannot approve your own proposal" (bid decisions) or "You cannot approve your own request" (project budgets and variations), and the deal stays at the approval step. A person who is not on the list is refused with "You are not an approver for bid decisions" or "You are not an approver for project budgets".
HOW TO SET IT UP	1. Under **Approvers**, tick the people who may approve a bid or no-bid proposal. Leave all unticked and every workspace admin can. 2. Switch **Allow self-approval** on in a one-admin workspace. Otherwise no one can approve. 3. Press **Save**. (**Price validity** and **Default markup** are on the same page; see B12.)

OPTIONS

Option	What it does	Default
Approvers	Members who may approve a proposal. Only members of this workspace are accepted.	Empty (every admin)
Allow self-approval	A proposer may approve their own proposal.	Off

WHAT IT AFFECTS ELSEWHERE

- The bid / no-bid approval step on a tender deal (Pipeline > Tenders).
- Project budget and variation approvals on a Contract project.
- Change History records the change.

CHECK IT WORKED

Raise a test bid proposal as one person and approve it as an approver. The deal moves on instead of showing the refusal.

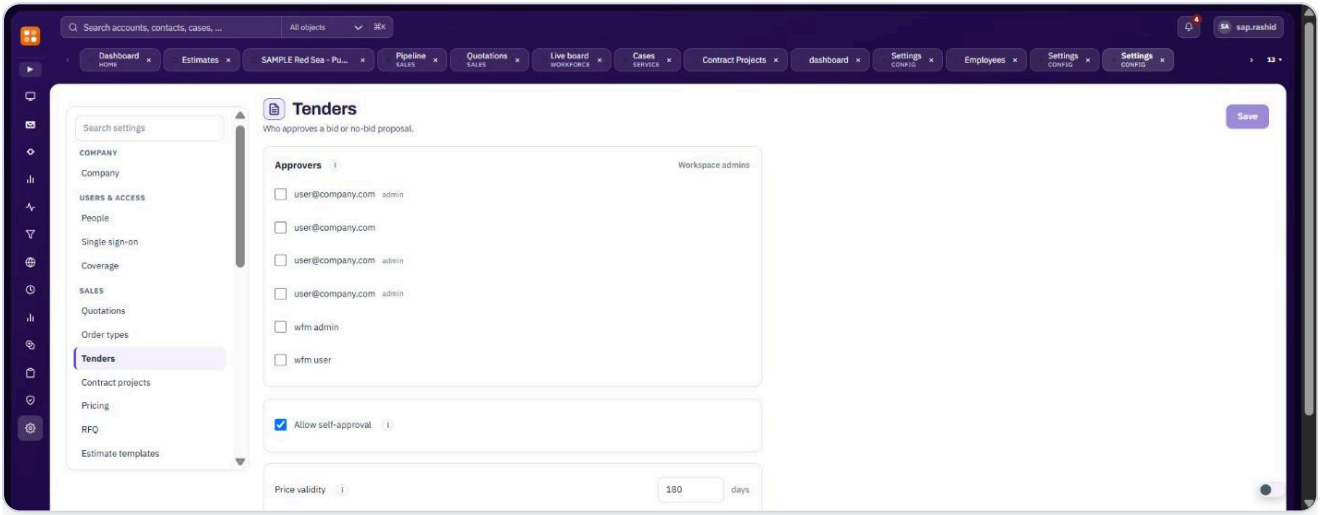


FIGURE 7 The approvers list, the self-approval switch, price validity and default markup.

A.4 Estimates

A12 Estimate templates

Module: Project Estimator.

IF YOU SKIP IT

The New estimate page shows "There is no estimate template yet" and offers starter buttons instead of the template cards. In Settings the list says "No estimate templates yet". Nobody can start an estimate until a template exists.

WHY IT IS NEEDED

An estimate starts from a template: its inputs, rates and rules decide the bill of materials and the cost.

WHAT IT CONTROLS

The templates an estimate is worked out from. A template holds inputs (questions), rates, and rule lines that turn a few answers into a bill of materials, a cost build-up

and a quote. Editing a template never re-prices an estimate that already exists.

WHERE TO FIND IT

Settings > Sales > Estimate templates. URL: `/settings/estimate-templates` . A template's editor is `/settings/estimate-templates/<id>` .

WHO CAN CHANGE IT

Admin only. Needs the module **Project Estimator**, and the person must be able to view the Estimates area.

HOW TO SET IT UP

1. To start from a ready-made one, press **Add the pipework, precast and civil starters** (or a single starter button). Starters are read-only.
2. Open the row menu on a starter and choose **Copy to customise**. You get your own copy.
3. Or press **+ New template** to start from a minimal one (one input, one rate, one rule).
4. In the editor, work through the tabs: **Details**, **Inputs**, **Rates**, **Rules**, **Check**. The Check tab lists what is wrong. Problem counts show on the tabs.
5. To import prices for catalogue items, press **Import rate sheet**.
6. In the row menu you can also choose **Details**, **Edit**, **Duplicate**, **Activate** or **Deactivate**, and **Delete**. A template that estimates were made from can only be deactivated.

OPTIONS

Option	What it does	Default
Details: Name, Description, Trade, Quote granularity, Module	Identity, and how detailed the customer's quote is (one line per group, or every bill of materials line). Module is a coded building model for pricing beyond formulas.	Empty
Inputs	Key, Label, Type, Default, Minimum, Maximum, Unit, Section, Help text, and a "Paints" link for 3D choices.	One input "Quantity" in a new template
Rates	Key, Label, Unit, Value, optional low and high range.	One rate "Unit rate" in a new template
Rules	Code, Group, Description, Unit, Quantity, Waste %, Cost component, Cost comes from (a rate or a catalogue product), Element type.	One rule "Item" in a new template
Panel: What it is	The line under the name on the New estimate card.	Empty
Panel: Words an email would use	Comma-separated words the AI reads to pick a template for a pasted email.	Empty
Panel: Card icon	Fence, Building, Tiles, Cabin, General.	By template geometry

Option	What it does	Default
Panel: Customers may request this	Reserved for a later customer request page. No effect today.	Off
Version	Goes up when the template body changes.	1

WHAT IT AFFECTS ELSEWHERE

- New estimate: the template cards, the Inbox "Create an estimate" template choice (see Inbox channels, A13), and the Standard Quote made from an estimate.
- The amber "illustrative rates" chip counts catalogue items still priced from a starter's placeholder cost.
- Change History records template changes.

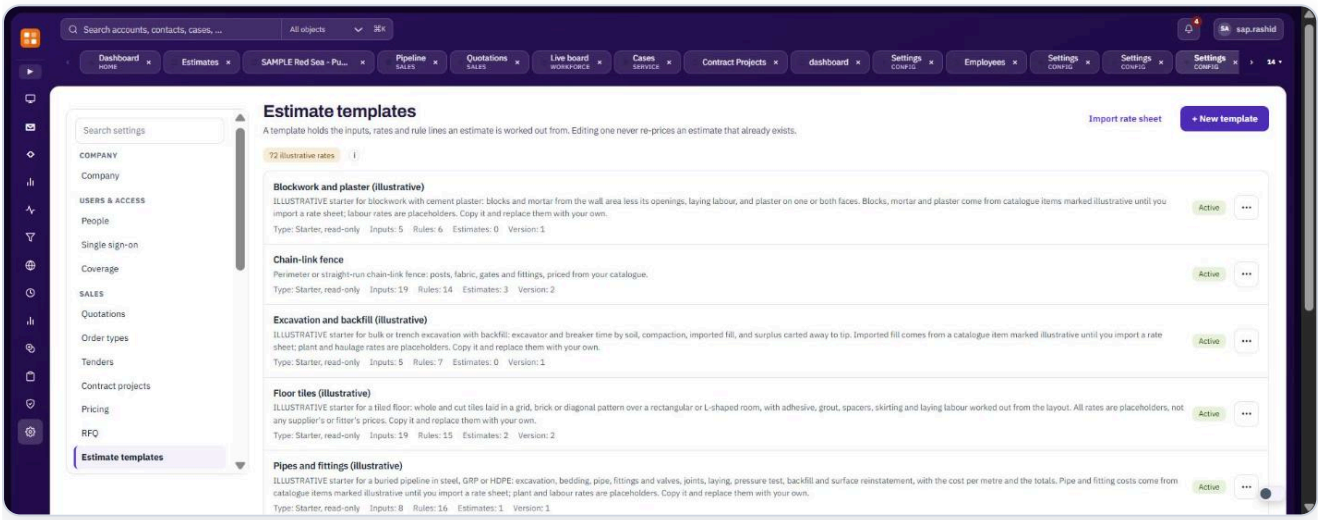


FIGURE 8 The template list with a starter and a custom template.

CHECK IT WORKED

The New estimate page shows a card for the template, and an estimate made from it produces a bill of materials.

A.5 Shared Inbox

A13 First inbox channel

Module: Shared Inbox (a platform-admin module).

IF YOU SKIP IT

The Inbox shows "No address yet." and, to an admin, "Add a channel to get an address customers can write to." To anyone else it says "No address has been set up for a team you are on." Mail has nowhere to arrive.

WHY IT IS NEEDED

A channel is the address customers write to. The Inbox lists only channels that exist.

WHAT IT CONTROLS

The addresses customers write to, who reads and answers each one, what the **Create** button offers first, and the mailbox replies go out from.

WHERE TO FIND IT

Settings > Integrations > Inbox channels. URL: `/settings/inbox` .

WHO CAN CHANGE IT

Admin only. Needs the platform-admin module **Shared Inbox**. Without it the address shows "not found".

HOW TO SET IT UP

1. Press **+ New channel**. Type a **Name**.
2. Choose the **Team**: tick Business Roles. Nobody picked means everyone with the Inbox.
3. Choose **Create offers first**: Quote, Project, Case, Estimate, Lead, Deal (Deal only with tender deals) or Nothing in particular. For Estimate, pick a **Template** or leave it to the system.
4. Choose a **Mailbox**: None (forwarding address only), Gmail or Mail server (IMAP). If it says "Not connected yet", connect it in Connectors first.
5. Set the **Reply name** and, with no mailbox, the **Reply from** address.
6. Press **Create**. Open the channel again to **Copy** the address and forward your company mail to it.

OPTIONS

Option	What it does	Default
Name	The channel's name. Required.	Empty
Address	The forwarding address customers or your mail rules send to. **New address** makes another and stops the old one at once.	Made on creation
Team	Which Business Roles see and answer this channel.	Everyone with the Inbox
Create offers first	What the Create menu shows first for mail on this channel.	Nothing in particular
Template	The estimate template to use when Create offers an Estimate.	Let the system suggest one
Mailbox	The connected mailbox read for this channel.	None
Reply name, Reply from	Who replies appear to come from.	Empty
Take in new mail	Off pauses the channel. Its mail stays.	On

WHAT IT AFFECTS ELSEWHERE

- The Inbox screen: which channels and which mail each team member sees.
- The Create menu on an email (Quote, Project, Case, Estimate, Lead, Deal).
- Outbound Emails log (kind "Inbox replies").

- Only a channel with no mail can be deleted. Pause it instead to keep its mail.
- Receiving by forwarding address needs the platform to have an inbound domain. A connected mailbox works without it.
- Change History records channel changes.

CHECK IT WORKED The channel's address is shown and can be copied. A test mail forwarded to it appears in the Inbox.

A.6 Saudi e-invoicing

A14 Saudi e-invoicing seller details

Module: Saudi e-invoicing (`einvoicing_ksa` , with the scheme set to Saudi ZATCA).

WHAT IT CONTROLS The seller details ZATCA needs on every invoice. An entity is the seller unit.

WHERE TO FIND IT Settings > Company > Company > **Entities** tab, inside the entity. URL: `/settings/company?tab=entities` . Add the entity first (see B2) if there is none.

WHO CAN CHANGE IT Admin only.

WHY IT IS NEEDED Sending a draft invoice (the status change, or the email) first checks that it is ready for Saudi e-invoicing, and sending gives it its number.

IF YOU SKIP IT The send is refused (HTTP 422) with "This invoice is not ready for Saudi e-invoicing: N things are missing." The invoice shows **Not ready · N** with each missing item. What is checked about the seller: legal name, name in Arabic, VAT number (15 digits, starting and ending with 3), commercial registration number (10 digits) and the address. Other rules: the invoice currency must be SAR (set it in A4), and a Standard invoice also needs the buyer's details on the account.

HOW TO SET IT UP

1. Open the **Entities** tab. Open the entity, or press **+ Add entity** (B2).
2. In the Saudi e-invoicing block, fill the VAT number, commercial registration, Arabic legal name, building number, street, district, city, postal code (5 digits) and country. The block shows only with Saudi e- invoicing on.
3. Press **Save**.

OPTIONS

Option	What it does	Default
Saudi e- invoicing (inside an entity)	Seller details for ZATCA: VAT number (15 digits, starts and ends with 3), commercial registration, Arabic legal name, building number, street, district, city, postal code, country. Shown only with Saudi e-invoicing on. The VAT number falls back to the Tax ID.	Empty

Check it worked. Open a draft invoice. The e-invoicing panel says **Ready** and sending is accepted. **A.7 Service**

The **Service** group is defined in the Settings menu, but it has no pages in it today. A group with no pages is not shown. Service areas (Cases, Inspection Reports, AMC, Work Orders, Dispatch, Technicians) have **no must-have settings**: they run on shipped defaults. They are shaped by settings that sit in other places in this guide:

- Extra fields on a case, work order or asset: **Custom fields** (B24).
- Equipment details that print on a quote: **Quote print fields** (B8).
- Who can reach Service screens: **Business Roles** (B4).
- The reply and quote emails Service uses: **Quotation templates** (B7) and **Email output** (C1).
- The Service card in Account 360: **Account 360 cards** (B14).

Part B. Nice to have

These settings ship with a working default, so the workspace runs without them. Each one is noticeably better with it, and each entry says what you lose if you skip it. Do them in the order of "Setup order" at the end.

B.1 Company and access

B1 Company profile and letterhead

Module: Core. The letterhead fields appear only if the workspace has Quotations, Invoices or Standard Quotes.

WHAT IT CONTROLS	Your company name and the letterhead printed on quotations and invoices.
WHERE TO FIND IT	Settings > Company > Company > **Profile** tab. URL: `/settings/company` .
WHO CAN CHANGE IT	Admin only. No module flag.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: the company name given at creation. Printed documents then show the initials on a colour block instead of a logo, and carry no address, email, website or tax ID line.

HOW TO SET IT UP

1. Open the **Profile** tab. Type the **Company name**. This is the name in the sidebar and, by default, on printed documents.
2. For a workspace that prints documents, upload the **Logo** (PNG, JPG or WebP, up to 2 MB), then fill **Address**, **Email**, **Website**, **Tax ID** and **Tagline**.
3. Open **More letterhead details** for the rarely used items: second email, footer line, header strip, logo background colour, phone numbers with labels, accreditation logos (top left of the quote) and partner logos (top right).
4. Press **Save**. The sidebar name and the documents update at once.

OPTIONS

Option	What it does	Default
Company name	The workspace name, shown in the sidebar and on documents. Required.	The name given at creation
Logo	Printed on quotations and invoices.	None. The initials show on the logo background colour.
Address, Email, Website, Tax ID, Tagline	Letterhead details.	Empty
Name on printed documents	Shown only when the old letterhead already used a different name. Clear it to print the company name.	Hidden
Second email, Footer line, Header strip	Extra letterhead lines.	Empty
Logo background	Colour behind the initials when no logo is uploaded.	#378ADD
Phone numbers	Label and number. They print in the footer as columns.	None
Accreditation logos	Certification logos, top left of the quote letterhead.	None
Partner logos	Brand logos, top right of the quote letterhead.	None

WHAT IT AFFECTS ELSEWHERE

The sidebar header and every printed or emailed quotation, standard quote and invoice (the letterhead). The logo in the sidebar (set by the platform admin) is separate from the Company logo.

CHECK IT WORKED A print preview of a quotation shows the logo and the letterhead lines.

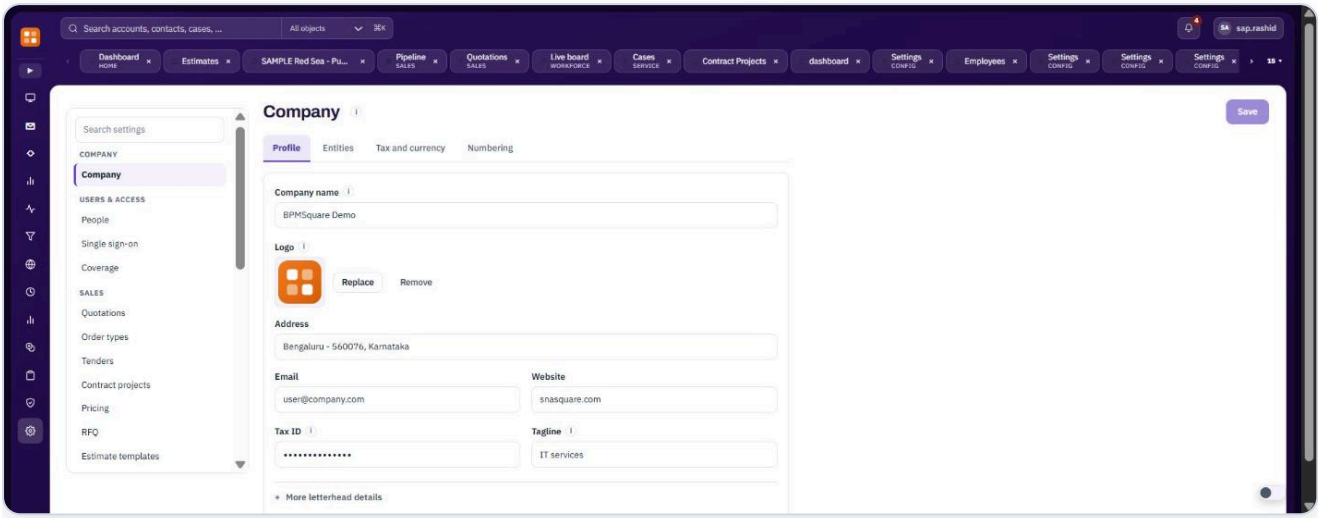


FIGURE 9 The Profile tab with the company name, logo and the "More letterhead details" closed.

B2 Legal entities

Module: Core. Needs Quotations, Invoices or Standard Quotes.

WHAT IT CONTROLS One row per legal body that issues quotes. The default one is picked on new quotations.

WHERE TO FIND IT Settings > Company > Company > **Entities** tab. URL: `/settings/company?tab=entities` . The old address `/settings/entities` opens the same tab.

WHO CAN CHANGE IT Admin only.

WHAT YOU LOSE IF YOU SKIP IT It **ships with a default**: quotations use the company details until you add an entity. You lose a separate legal name, address and tax ID per issuing company, and the entity picker on a new quotation. (A Saudi e-invoicing workspace needs an entity: see A14.)

HOW TO SET IT UP

1. Open the **Entities** tab. Press **+ Add entity**. Fill **Legal name**, **Short name**, **Address**, **Phone**, **Email** and **Tax ID**.
2. Press **Make default** on the one most quotations use. Press **Done**, then **Save**.

OPTIONS

Option	What it does	Default
Legal entities	One row per legal body that issues quotes. The default one is picked on new quotations.	None. Quotations use the company details until you add one.

Option	What it does	Default
Entity fields	Legal name, Short name, Address, Phone, Email, Tax ID. More: Tagline.	Empty

WHAT IT AFFECTS ELSEWHERE

The New Quotation form (entity picker) and the letterhead of the printed document.

CHECK IT WORKED

The New Quotation form offers the entity, and the printed quote shows its legal name.

B3 Quotation numbering

Module: Core. Needs Quotations, or at least one object with a system number range.

WHAT IT CONTROLS

How quotation numbers are built.

WHERE TO FIND IT

Settings > Company > Company > **Numbering** tab. URL: `/settings/company?tab=numbering` . The old address `/settings/number-ranges` opens the same tab.

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default** (`QT-2026-0001` style, restarting every year). You lose your own prefix and format.

HOW TO SET IT UP

1. Open **Numbering**. Set **Prefix**, **Template**, **Digits** and **Restart numbering**. The line "Next quotation" shows the result.
2. Press **Save**.

OPTIONS

Option	What it does	Default
Quote ID: Prefix	The text at the start of the number.	QT
Quote ID: Template	Tokens: `{PREFIX}` `{YYYY}` `{YY}` `{MM}` `{SEQ}` .	`{PREFIX}-{YYYY}-{SEQ}`
Quote ID: Digits	Length of the running number, 2 to 6.	4
Quote ID: Restart numbering	Every year, or never.	Every year

Option	What it does	Default
System IDs (read-only list)	The numbers the system makes itself: ACC-0001, CON-0001, AST-0001, SUP-0001, INV-0001 (inventory), EMP-0001, SQ-2026-0001, INV-2026- 0001 (invoices), PO-2026-0001, CS-2026-0001.	Fixed

WHAT IT AFFECTS ELSEWHERE

A new format applies to new quotations only. Existing numbers are never rewritten. The Numbering tab only sets the quotation format. Other objects use fixed formats. Order numbers use the prefix of the Order type (see Order types, B9).

CHECK IT WORKED

The "Next quotation" line shows the format you set, and the next quotation made carries it.

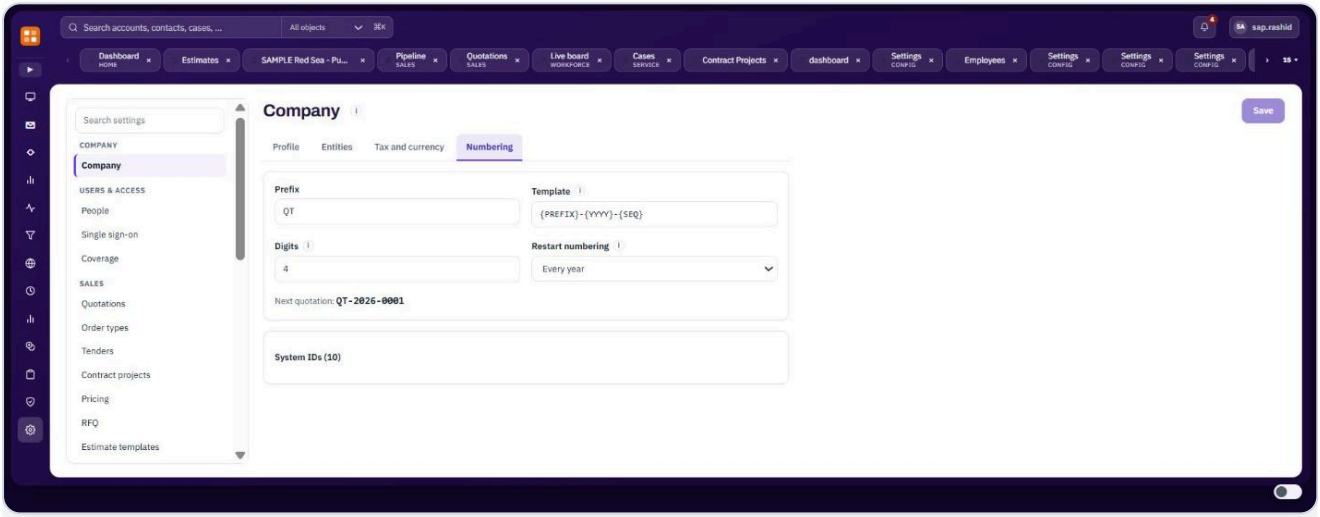


FIGURE 10 The Numbering tab with the quote ID format and the "Next quotation" example.

B4 Business Roles (the Roles tab)

Module: Core. Needs the module **Business Roles**.

WHAT IT CONTROLS

The roles that narrow what a Member sees: which areas, and what they may do in each.

WHERE TO FIND IT

Settings > Users & access > People > **Roles** tab. URL: `/settings/people?tab=roles` . The old addresses `/administration/business-roles` and `/settings/team` open People.

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

A Member with no Business Role keeps full access to everything and sees every sidebar item. You lose narrower menus and per-role default dashboards. Business Roles are not a data boundary, so skipping them never weakens security.

Business Roles.

A Business Role is a set of areas (the product calls them workcenters), such as Accounts, Quotations or Workforce. For each area you tick, you choose what the person may do: **Create**, **Edit**, **Delete**. Ticking an area gives view access.

- Roles are given to **Members** only. An Admin does not need one.
- A Member with **no** Business Role keeps full access to everything. Giving a role is an opt-in to a narrower view.
- If a Member has several roles, the access is the union. One role can only add access, never take it away.
- Each role can have its own default dashboard. People with several roles see the dashboards combined.
- Eight standard roles ship with the product: Sales User, Sales Admin, Service User, Service Admin, Marketing User, Marketing Admin, WFM User and WFM Admin. They are read-only. Duplicate one to change it. **Sync with catalog** re-applies the current definition to a standard role. Administration and Data Workbench are in none of the standard roles, because an Admin already has them. "Sales Admin" and the like are Business Roles. They are not the workspace role Admin.

Business Roles hide menu items and dashboards. They are a menu-visibility feature. They are **not** a data boundary: the product's data routes do not check them. Do not use them to keep information secret from a colleague. Business Roles also need the module "Business Roles" switched on for your workspace.

HOW TO SET IT UP

Make a role

1. Open the **Roles** tab. Press **New role**.
2. Type a **Name**. Tick the areas the role opens. For each, tick **Create**, **Edit**, **Delete** as needed.
3. Open **More** for a **Description** and a **Default dashboard**. Save the role first, then press **Set up** to choose the dashboard blocks for the role.
4. Press **Save**. Use **Duplicate** to copy a role, including a standard one.

OPTIONS

Option	What it does	Default
Role: Name	The role's name. Required.	Empty
Role: Access	Areas the role opens, with Create, Edit, Delete.	None ticked
Role: Description	A note about the role.	Empty
Role: Default dashboard	The dashboard people with this role see first.	Not set (the workspace dashboard applies)
Standard role	Read-only. Duplicate it to change it. **Sync with catalog** brings it up to date.	Eight shipped roles

WHAT IT AFFECTS ELSEWHERE

- Removing a role: members who held only that role revert to full access.
- The Inbox channel "Team" choice lists Business Roles (see Inbox channels, A13).
- The Settings menu a Member reaches: an entry is tied to an area, and a role that grants Edit on it opens the page.

CHECK IT WORKED

Give a test Member the role and sign in as them: the sidebar shows only the areas the role opens.

B.2 Sales

The **Quotations** page has four tabs, covered as B5 to B8. It replaced five older pages (Quote statuses, Quote types, Text templates, Email templates, Asset print fields). Its address is `/settings/quotations` ; the other tabs are `?tab=types` , `?tab=templates` and `?tab=print` . The old addresses `/settings/statuses` , `/settings/quote-types` , `/settings/templates` , `/settings/email-templates` and `/settings/asset-print-fields` open the matching tab.

B5 Quotation statuses

Module: Quotations.

WHAT IT CONTROLS

The stages a quotation moves through.

WHERE TO FIND IT

Settings > Sales > Quotations > **Statuses** tab.

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: Draft, Sent, Approved and Rejected. You lose stages that match how your team sells (for example "Technical review").

HOW TO SET IT UP

1. Open **Statuses**. Press **+ New status**. Type a **Name**, pick a **Colour** (12 presets or your own), press **Add status**. A new open status lands before the closed ones.
2. Click a status to open its panel. Change the name or colour. Switch **Closed** on for an end status. Use **Earlier** and **Later** to move it. Press **Start new quotes here** to make it the starting status. Press **Remove** to delete it.
3. **Reset to defaults** puts the four standard statuses back in the draft. Press **Save** to keep it.

OPTIONS

Option	What it does	Default
Status: Name	The label. A stored key is made from the name once and never changes.	Draft, Sent, Approved, Rejected
Status: Colour	Dot colour.	Blue, purple, green, red
Status: Starts here	Where new quotes begin. Exactly one.	Draft
Status: Closed	A closed status locks the quote and asks for an outcome (won or lost). At least one must be closed.	Approved and Rejected

Rules the page enforces: at least one status, every status named, exactly one starting status, at least one closed status, and no two statuses with the same name.

WHAT IT AFFECTS ELSEWHERE

The Quotations list, the quote form, and the pipeline of quotes (status chips, closing, outcome). Deal stages for the pipeline board have no settings screen today. They use the built-in stages (Qualify, Propose, Negotiate, Won, Lost).

CHECK IT WORKED

A new quotation starts at the status marked **Starts here**, and closing a quote asks for an outcome.

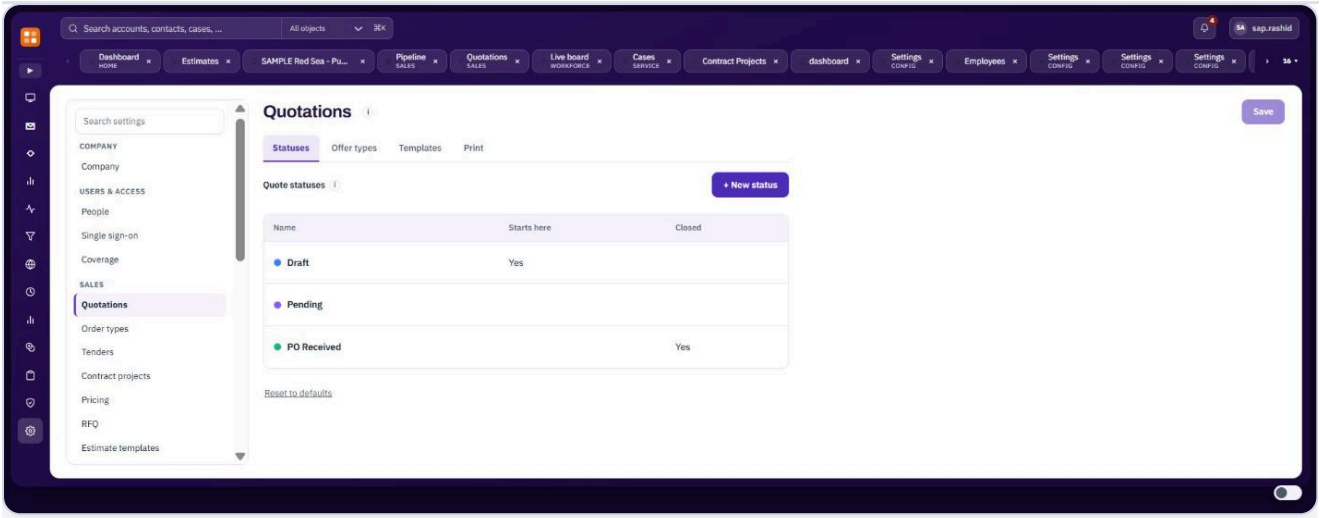


FIGURE 11 The Statuses table with the four defaults.

B6 Offer types

Module: Quotations.

WHAT IT CONTROLS
Which offer types people can pick on a new quotation.

WHERE TO FIND IT
Settings > Sales > Quotations > **Offer types** tab (`?tab=types`).

WHO CAN CHANGE IT
Admin only.

WHAT YOU LOSE IF YOU SKIP IT
It **ships with a default**: every type is shown. You lose a shorter picker.

HOW TO SET IT UP

1. Open **Offer types**. Switch a type off to remove it from the New Quotation picker. Quotes already made keep their type.
2. Press **Save**.

OPTIONS

Option	What it does	Default
Offer types	Quotation, Technical Offer, Budgetary Offer, Supply Quotation, AMC Contract, Installation. The last two are marked "Coming soon".	All shown

WHAT IT AFFECTS ELSEWHERE
The New Quotation picker.

CHECK IT WORKED
The New Quotation picker lists only the types switched on.

B7 Quotation templates (saved texts and emails)

Module: Quotations.

WHAT IT CONTROLS

The saved texts and emails used while writing and sending a quotation.

WHERE TO FIND IT

Settings > Sales > Quotations > **Templates** tab (`?tab=templates`).

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: without a default email of its kind, a built-in text is used. You lose your own wording for line items, notes, terms, scope of work and the emails.

HOW TO SET IT UP

1. Open **Templates**. Pick a filter chip (All, Line item, Notes, Terms, Scope, Email) or press **+ New template**.
2. Type a **Name**, choose the **Kind**, write the **Text** (for an email, the **Subject** and **Body**). Open **Placeholders** to see the values you can insert, written as `{{name}}` .
3. For an email, switch **Default for this kind** on. Sending uses the default email of its kind. Without one, a built-in text is used.
4. Press **Save** in the panel. Templates save on their own and do not need the page Save.

OPTIONS

Option	What it does	Default
Template kinds	Line item, Notes, Terms, Scope of work, Email: quotation, Email: invoice, Email: supplier RFQ. An old Email: inspection report can be listed but is not sent.	None
Template: Default for this kind	One default per email kind.	Off

WHAT IT AFFECTS ELSEWHERE

The "insert text" and "send email" actions on a quote. Supplier RFQ emails and invoice emails use their own kinds. Standard Quotes keep their own templates on the Standard Quotes screen, not here.

CHECK IT WORKED

Sending a quote email uses your default template of that kind.

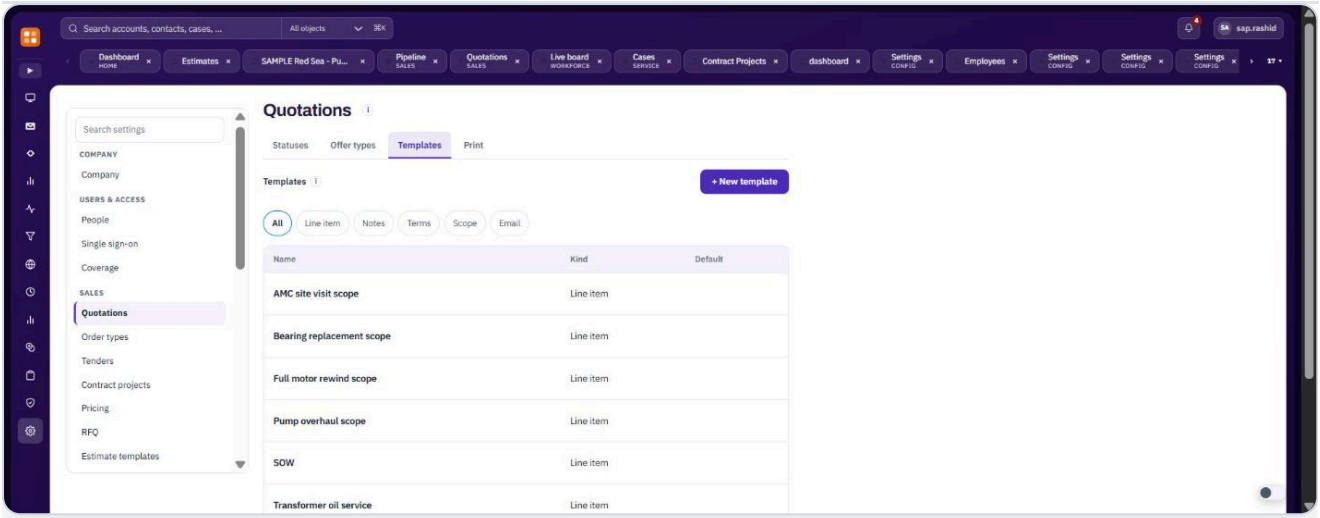


FIGURE 12 The Templates table with the kind filter chips.

B8 Quote print fields

Module: Assets. A workspace with Assets and no Quotations sees this tab alone.

WHAT IT CONTROLS

Which equipment fields print in the Equipment Details block of a quote.

WHERE TO FIND IT

Settings > Sales > Quotations > **Print** tab (`?tab=print`).

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

With nothing chosen, the Equipment Details section is left out of the printed quote.

HOW TO SET IT UP

1. Open **Print**. Click the equipment fields that should print in the Equipment Details block of a quote. **Motor nameplate** holds the electrical fields.
2. Press **Save**. With nothing chosen, the section is left out.

OPTIONS

Option	What it does	Default
Print: Equipment fields	Equipment name, Type, Make / OEM, Model / Frame, Rating, RPM, Serial no., Remarks, plus your Asset custom fields.	None chosen
Print: Motor nameplate	Frame / Type, Insulation class, Connection, Duty, Ambient temp., Output (kW), Stator voltage, Stator current, Excitation voltage, Excitation current, Frequency.	None chosen

WHAT IT AFFECTS ELSEWHERE

The printed quote (Equipment Details section).

CHECK IT WORKED

A printed quote for an asset shows the fields you ticked.

B9 Order types

Module: Sales Orders. If the database update for Sales Orders has not been applied, the page says so.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: the first time an order is made, a "Standard order" type (prefix SO, internal pricing) is created for you. If every type is switched off, the new order is refused with "Every order type is switched off. Switch one on in Settings." You lose per-type numbering, pricing mode, selection rules and PDF design.

WHAT IT CONTROLS

The kinds of sales order your workspace takes. Each type has its own number prefix, its pricing mode, the customers it suits, and its own PDF design.

WHERE TO FIND IT

Settings > Sales > Order types. URL: `/settings/order-types` .

WHO CAN CHANGE IT

Admin only. Needs the module **Sales Orders**. If the database update for Sales Orders has not been applied, the page says so.

HOW TO SET IT UP

1. Press **+ New order type**.
2. Type a **Name**. Check the **Prefix**. Choose **Pricing**. Choose whether it is the **Default type**.
3. Open **Selection rules** and add rules if the type should be picked by itself for certain customers.
4. Open **PDF design** to choose which blocks print, their order, any block text, the accent colour and the logo position. Press **Preview with sample data**.
5. Press **Add order type**.
6. To stop using a type, open it and press **Remove**. If it has orders it is **switched off** instead of deleted. Press **Switch on** to bring it back.

OPTIONS

Option	What it does	Default
Name	The type's name. Required.	Empty
Prefix	Orders are numbered PREFIX-0001, counted per workspace and prefix. 2 to 6 letters or digits, shown in capitals. Affects new orders only.	SO
Pricing	Internal: price list and pricing engine. External: supplied by the ERP and kept read- only.	Internal
Default type	Used when no rule matches. One type is always the default.	On for the first type
Selection rules	The first matching rule picks the type for a new order. Fields: Customer group, Region, Made from (Standard quote, Quotation, Deal, Lead, Email, Typed in directly).	None

Option	What it does	Default
PDF blocks	Letterhead, Order number and date, Customer / bill-to / ship-to, Intro text, Line items table, Total, Notes, Terms and conditions, Signature block, Footer text, Specifications table, Call-to-action banner. Required blocks are always shown.	The standard quote block set
Accent colour	Colour on the PDF.	#378ADD
Logo position	Left, Centre or Right.	Left

WHAT IT AFFECTS ELSEWHERE

- The Sales Orders list, the new order form (type choice), the order PDF, and email and WhatsApp sends.
- Order numbers.
- The ERP organisation chips on the row (when Integration middleware is on).
- Change History records order type changes.

CHECK IT WORKED

The new order form offers your types, and an order is numbered with the type's prefix.

B10 Pricing rate card

Module: Quotations (the rate card). **Pricing Engine** adds the Dynamic Pricing link.

WHAT YOU LOSE IF YOU SKIP IT

The rate picker while pricing a quotation has nothing to pick, so people type rates by hand each time.

WHAT IT CONTROLS

Small Scale Pricing: a rate card of standard rates for labour, materials, testing and transport that people pick while pricing a quotation. With Dynamic Pricing on, the page also links into the Pricing workspace.

WHERE TO FIND IT

Settings > Sales > Pricing. URL: `/settings/pricing` .

WHO CAN CHANGE IT

Admin only. The rate card needs **Quotations**. The Dynamic Pricing link needs **Pricing Engine**. The page shows if either is on.

HOW TO SET IT UP

1. Press **+ New rate**. Type a **Description**, choose the **Category**, type the **Unit** (for example "per job") and the **Rate**.
2. Open **More** to add **Notes**. Press **Save**.
3. Use the category chips (All, Labour, Material, Testing, Transport) to filter. Click a row to edit. Press **Delete** in the panel to remove a rate.

4 For Dynamic Pricing, press **Open Pricing setup**. That opens `/pricing/setup`, which is a workspace of its own and not a Settings page.

OPTIONS

Option	What it does	Default
Description	What the rate is for. Required.	Empty
Category	Labour, Material, Testing or Transport.	Labour, or the chip you filtered by
Unit	What the rate is per. Required.	Empty
Rate	Amount in the workspace currency. Zero or more.	0
Notes	A free note.	Empty

WHAT IT AFFECTS ELSEWHERE

- The rate picker while pricing a quotation. Quotes already priced keep their figures.
- Dynamic Pricing (rates, price books, history) lives under Pricing in the sidebar, not here.

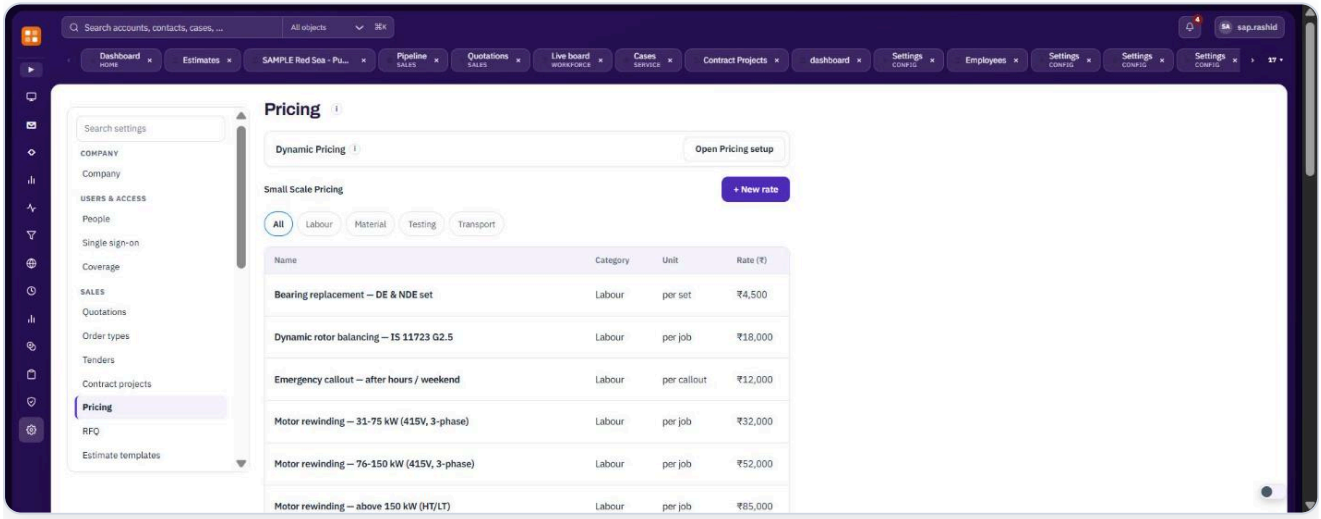


FIGURE 13 The rate table with category chips and the Dynamic Pricing row.

CHECK IT WORKED

The rate appears in the rate picker while pricing a quotation.

B11 RFQ mail and timing

Module: RFQ.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: BPMSquare sends and receives, five days to reply, two reminders, a 14-day reply link. You lose your own mailbox as the sender, your own timing and your standing terms on every RFQ.

WHAT IT CONTROLS

How requests for quotation reach suppliers and how their replies come back: your own mailbox or BPMSquare's sender, the reply window, reminders, the reply link and the terms printed on every RFQ.

WHERE TO FIND IT

Settings > Sales > RFQ. URL: `/settings/rfq` .

WHO CAN CHANGE IT

Admin only. Needs the module **RFQ**.

HOW TO SET IT UP

1. Under **Mail channel**, pick **Your own mailbox** or **BPMSquare sends and receives**.
2. For your own mailbox, pick **Gmail (App Password)** or **Mail server (SMTP / IMAP)**. If it says "Not connected yet", connect it under Settings > Integrations > Connectors, then save here.
3. Set **Days to reply**, **Reminders per supplier**, **Link works for** and **Price goes stale after**.
4. Tick or untick **Attach the RFQ as a PDF**. Write the **Terms printed on every RFQ**.
5. Press **Save**.

The check lines show whether sending, receiving and the no-login reply link are ready on this platform. An amber line is set up by the platform team, not by you.

OPTIONS

Option	What it does	Default
Mail channel	Your own mailbox (replies arrive in your inbox and are also filed on the right RFQ every few minutes), or BPMSquare sends and receives (each supplier gets a personal reply-to address).	BPMSquare sends and receives
Mailbox	Gmail or Mail server, used when you pick your own mailbox.	Gmail
Days to reply	Sets the reply-by date on a new RFQ. 1 to 90.	5
Reminders per supplier	At most this many per supplier. 0 to 5.	2
Link works for (days after deadline)	How long the supplier's reply link works after the deadline. 0 to 90.	14

Option	What it does	Default
Price goes stale after (days)	An answer with no validity date is stale after this. Stale prices show in amber and are never called the lowest. 30 to 730.	180
Attach the RFQ as a PDF	The Excel reply sheet is always attached.	On
Terms printed on every RFQ	Text under the line table. Up to 4000 characters.	Empty

WHAT IT AFFECTS ELSEWHERE

- RFQs raised from quotes, deals, cases, inspections, work orders and fence projects.
- The RFQ comparison (blue lowest valid price, amber stale or expired).
- The Outbound Emails log (kind "Supplier RFQs").
- Workspaces without the RFQ module keep the older single-supplier pricing request under Pricing.

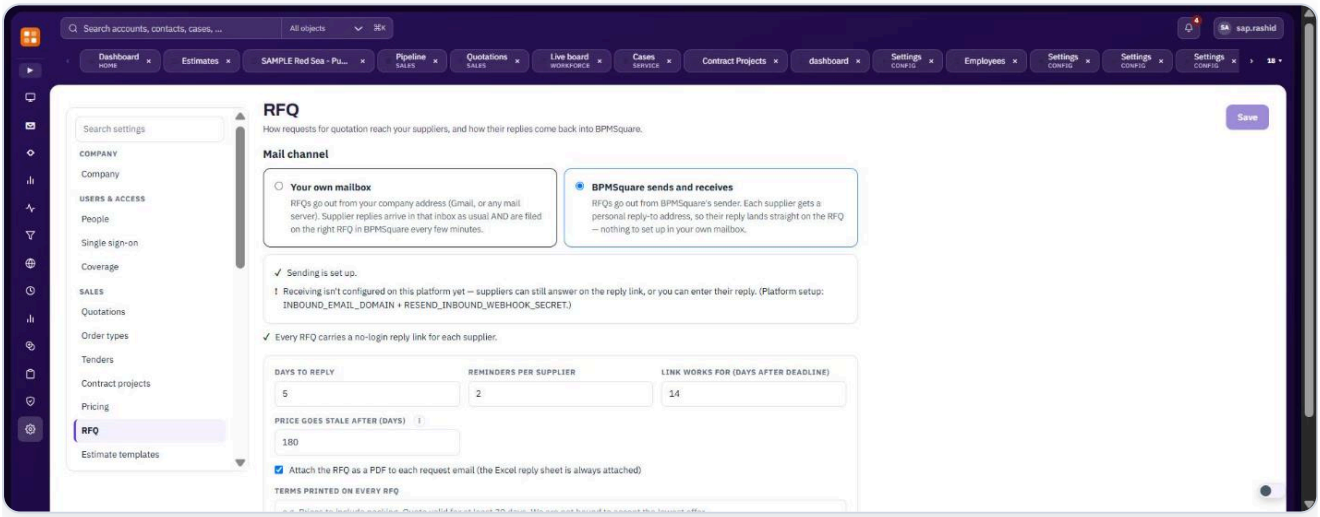


FIGURE 14 The mail channel choice, the check lines and the timing fields.

CHECK IT WORKED

The check lines on the page show sending, receiving and the reply link as ready (an amber line is set up by the platform team, not you). An RFQ sent to yourself arrives with the PDF and the Excel reply sheet.

B12 Tender pricing defaults

Module: Tenders (**GCC tender deals**).

WHAT IT CONTROLS

How old a supplier price may be before it counts as stale, and the markup that "Award and price" starts from.

WHERE TO FIND IT	Settings > Sales > Tenders. URL: `/settings/tenders` . (The same page holds the approvers: see A11.)
WHO CAN CHANGE IT	Admin only.
WHAT YOU LOSE IF YOU SKIP IT	It **ships with a default** (180 days, 15 percent). You lose a stale-price rule and a markup that match your trade.
HOW TO SET IT UP	1. Set **Price validity** in days and **Default markup** in percent. 2. Press **Save**.

OPTIONS

Option	What it does	Default
Price validity (days)	A supplier or past-project price older than this is marked stale and never applied automatically. Whole days, 1 to 3650.	180
Default markup (%)	What an award adds to a supplier's cost when you do not type another. Cost 100 at 15% gives a rate of 115. Range 0 to 1000.	15

WHAT IT AFFECTS ELSEWHERE	• Stale-price flags on Bill of quantities lines. • The Costing step "Award and price".
CHECK IT WORKED	A supplier price older than the validity is flagged stale on a Bill of quantities line, and "Award and price" starts from your markup.

B13 Contract project lists and margin

Module: Contract projects (needs **GCC tender deals** as well).

WHAT YOU LOSE IF YOU SKIP IT	It **ships with a default**: the first time the page is used, Resource levels, Cost codes and Justification reasons get a starter list (the other three lists start empty), and the margin is 15 percent. The starter lists are not your client's own. You lose the client's own cost codes, reasons and divisions, and a margin that matches the trade.
WHAT IT CONTROLS	The lists a project budget line points at (resource levels, cost codes, justification reasons, reserve types, divisions, job locations), and the margin assumed when a tender line's cost is not known.
WHERE TO FIND IT	Settings > Sales > Contract projects. URL: `/settings/contract-projects` .
WHO CAN CHANGE IT	Admin only. Needs both **Contract projects** and **GCC tender deals**.

HOW TO SET IT UP

1. In the **Lists** table, press **Open** on a list. A side panel opens.
2. To load many entries, press **Import a file**. Use a CSV or Excel file with a header row: Code, Name, and optionally Parent. Format the code column as text so leading zeros stay. The result shows how many were added, updated or refused.
3. To add one entry, fill **Code**, **Name** and optionally **Parent** and press **Add**.
4. Use **Search** to find an entry. Press **Switch off** or **Switch on** on a row. Nothing is deleted.
5. Set **Default margin for estimated costs** and press **Save**.

OPTIONS

Option	What it does	Default
Resource levels	Cost types such as Material, Asset.	Starter list
Cost codes	The codes a budget line is filed under.	Starter list
Justification reasons	Why a budget line changed.	Starter list
Reserve types	Types of reserve.	Empty
Divisions	Company divisions.	Empty
Job locations	Where jobs are done.	Empty
Import a file	Replaces or extends a list. Entries match on list and code. A parent code not in the file or the list is dropped with a note, and the row is still stored.	None
Default margin for estimated costs	When a tender line's cost is not recorded, the budget starts at the rate less this margin and says "estimated". 0 to 95.	15

The table shows, for each list, how many entries are active, and whether it is the starter list, from a file or entered by hand. The starter lists are not your client's own. Import a file to replace them. Only Resource levels, Cost codes and Justification reasons come with starter rows. Reserve types, Divisions and Job locations start empty.

WHAT IT AFFECTS ELSEWHERE

- The budget by resource and cost code on a Contract project, and the "estimated" flag on lines.
- A later link to ePROMIS refreshes these lists (see Connectors, C2).
- Change History records the margin change.

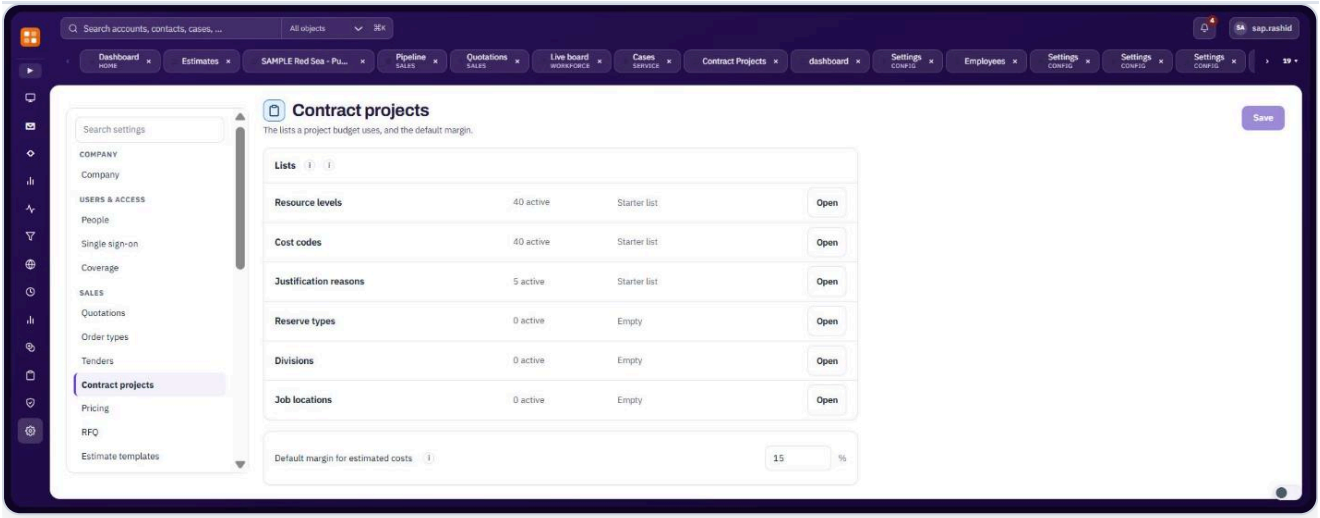


FIGURE 15 The Lists table and the default margin.

CHECK IT WORKED The Lists table shows each list as "from a file" or "entered by hand", not "starter".

B14 Account 360 cards

Module: Account 360 (shown to workspaces with the **Nova** experience or the **Spectacular** theme, the two that mount the drawer).

WHAT IT CONTROLS Which cards the Account 360 drawer shows, and in what order.

WHERE TO FIND IT Settings > Sales > Account 360. URL: `/settings/account-360` .

WHO CAN CHANGE IT Admin only.

WHAT YOU LOSE IF YOU SKIP IT It **ships with a default**: all built-in cards, in a fixed order. You lose a shorter drawer in your own order.

HOW TO SET IT UP

1. Under **Cards**, switch a card off to hide it. Use the arrows to move it up or down.
2. Press **Save**. (External sources are on the same page: see C7.)

OPTIONS

Option	What it does	Default
Built-in cards	Pipeline, Revenue, Service, People, Installed base, Contracts, In ABM programs, Sales coverage, Projects, Marketing, Buying signals, Company analysis. Some show only when their module is on (ABM, Coverage, project costing, lead scoring, Buying signals, web research).	All shown, in this order

The rating at the top of the drawer is a weighted rubric, not an AI guess. It cannot be changed here.

WHAT IT AFFECTS ELSEWHERE

The Account 360 drawer on accounts.

Note: this page still prints some explanation lines on screen.

CHECK IT WORKED

The drawer on an account shows the cards in your order.

B15 Coverage

Module: Coverage (`coverage_model`).

WHAT YOU LOSE IF YOU SKIP IT

Nothing is assigned automatically. New accounts and leads get no owner by rule, and lead hand-over has no team to use (it falls back to the turn-taking list, B19).

WHAT IT CONTROLS

Who owns, supports and services which accounts, by rules instead of fixed territory lists. It has three parts: **Teams** (people who work together), **Segments** (a rule that picks a set of accounts), and **Coverage** (which team covers which segment in which role). It also drives automatic ownership, product availability and ERP routing.

WHERE TO FIND IT

Settings > Users & access > Coverage. URL: `/settings/coverage` .

WHO CAN CHANGE IT

Admin only. Needs the module **Coverage (coverage_model)**.

HOW TO SET IT UP

1. Open **Teams**. Press **+ New team**. Type a **Name**. Pick a **Lead**. With lead scoring on, choose **Who gets new sales-ready leads**: The team lead, or Each member in turn. Tick the **Members**. Press **Add team**.
2. Open **Segments**. Press **+ New segment**. Type a **Code** (capitals) and a **Name**. Pick the filters and choose **Match ALL** or **Match ANY**. Optionally pin **Named accounts** that are always in, whatever the rule says. Press **Add segment**.
3. Open **Coverage**. Press **+ New coverage**. Pick the **Segment**, the **Team**, the **Role** (Owner, Overlay or Service) and a **Priority**. Choose where to **Push this coverage's accounts to** (an ERP webhook). Set **Effective from** and, if needed, **Effective to**. Press **Add coverage**.
4. Use the three-dot menu on a row to **Edit** or **Delete**.

OPTIONS

Option	What it does	Default
Team: Name, Lead, Members	The group and its lead.	Empty
Team: Who gets new sales-ready leads	The team lead, or each member in turn. Shown only with lead scoring. Used by lead hand-over (see Lead hand-over, B19).	The team lead
Segment: Code, Name	Identify the rule.	Empty
Segment: Match ALL / ANY	Whether all filters or any one filter must be true.	ALL
Segment: Named accounts	Accounts always included.	None
Coverage: Role	Owner (one team wins), Overlay and Service (all matches apply).	Owner
Coverage: Priority	Only for Owner. When two Owner segments match, the lower number wins.	100
Coverage: Push this coverage's accounts to	The webhook that receives the account. With the Webhooks library on, this list is the Call webhooks for accounts. Otherwise it is the tenant default endpoint or a named endpoint.	None or the default endpoint
Coverage: Effective from, Effective to	The dates the coverage applies.	Today, no end

WHAT IT AFFECTS ELSEWHERE

- Account owner on new accounts and leads (auto-ownership).
- The **Sales coverage** card in Account 360 (B14).
- Lead hand-over: which team and which person receive a ready lead (Lead hand-over, B19).
- Push to ERP routing (Webhooks, C4, and Webhooks and push, C5).
- Change History records team, segment and assignment changes.

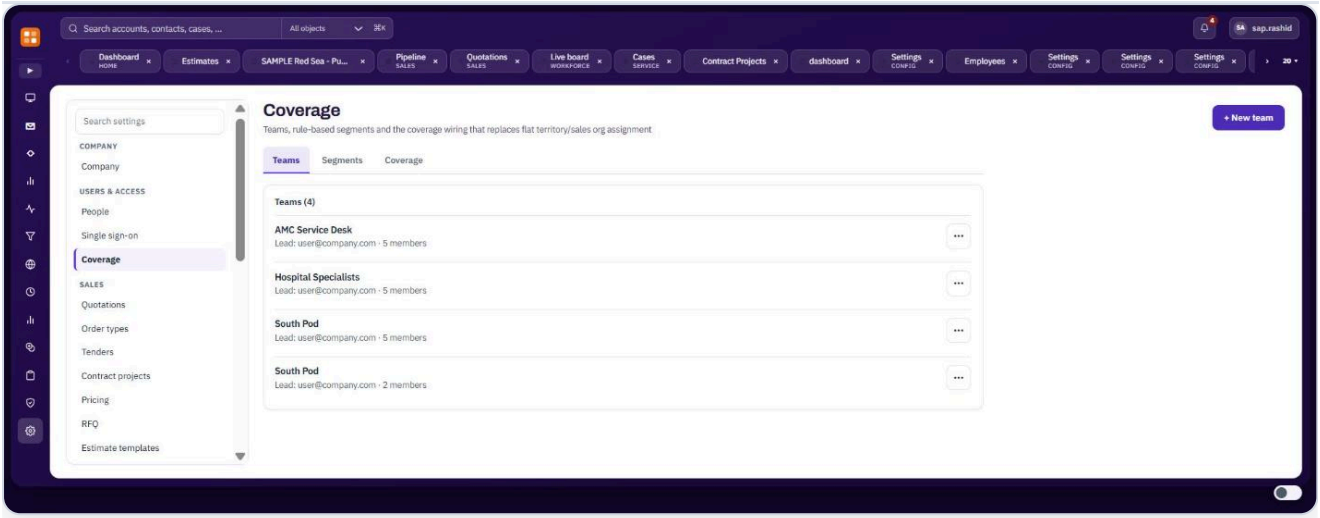


FIGURE 16 The Teams tab with one team.

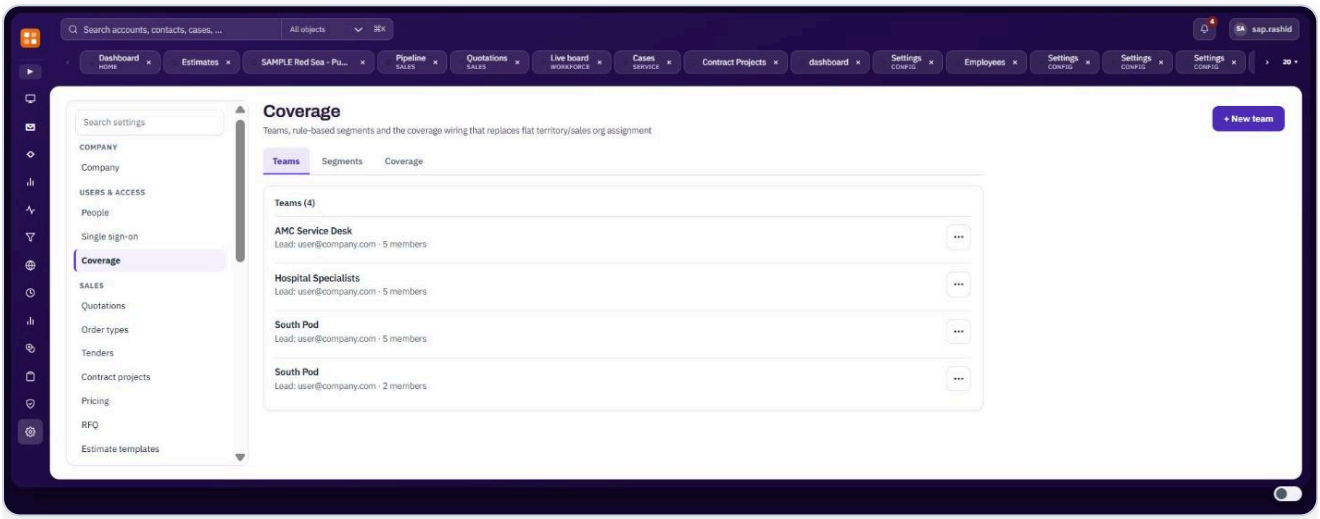


FIGURE 17 The Coverage tab with one assignment row.

CHECK IT WORKED A new account in a covered segment gets the team's owner automatically.

B.3 Marketing

The Marketing group holds three pages. Consent and Leads share the marketing program switch. The marketing modules themselves (Forms, Journeys, Newsletters, WhatsApp, ABM, Events, Revenue by source) have no settings pages of their own. Their limits live in Consent > Limits.

B16 Marketing consent

Module: the platform-admin module **Consent, lead scoring and hand-over (marketing_scoring)**, or **Newsletter Studio**. The "Count newsletter opens" switch appears only with Newsletter Studio.

WHAT IT CONTROLS What you may email, and the topics people can agree to or refuse.

WHERE TO FIND IT

Settings > Marketing > Consent. URL: `/settings/marketing-consent` .

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a safe default**: base "Everywhere else", only people who have said yes are emailed, and four topics. You lose a country rule that matches where you trade, your own topics, and the right default for "confirm by email" on forms. Until someone says yes, nobody is emailed.

HOW TO SET IT UP

1. Choose **Based in**. This is where your business is based. It also sets the default of "ask the person to confirm by email" on forms (on for the EU, off elsewhere).
2. Under **Rules by country**, click a country. Choose what applies to a person with no recorded answer: **Only people who have said yes**, or **Also existing customers, about similar products**. The second choice shows an amber warning. It is not offered for India.
3. Press **Show other countries** to see the rest. A relaxed rule is never hidden.
4. Under **Topics**, press **Add a topic**. Type a **Name** (up to 40 characters) and **Covers** (up to 160). Press **Done**. Use **Remove topic** to delete one.
5. Press **Save**.

OPTIONS

Option	What it does	Default
Based in	Saudi Arabia, United Arab Emirates, Qatar, Kuwait, Oman, Bahrain, India, European Union, Everywhere else.	Everywhere else
Count newsletter opens	Adds a tracking pixel to newsletters. Off by default because opens are unreliable and many countries restrict tracking. Clicks are always counted.	Off
Rules by country	For a person with no recorded answer: only people who said yes, or also existing customers.	Only people who said yes, in every country
Topics	What people can agree to separately. Up to 20. A topic people have already answered can be renamed but not removed.	Offers, New products, Service reminders, Events

Until someone says yes, nobody is emailed unless you chose otherwise. Every yes and no is kept as a record with when and how it was given.

WHAT IT AFFECTS ELSEWHERE	• Every campaign, newsletter, journey and WhatsApp send: the consent check runs again at the moment of sending. • Forms and the preference centre (topics, confirm by email). • Change History records these under "Marketing settings".
CHECK IT WORKED	Forms and the preference centre show your topics, and a campaign to a person with no recorded answer is held back.

B17 Marketing limits

Module: Journeys or WhatsApp marketing. The **Limits** tab appears only with one of them.

WHAT IT CONTROLS	When and how often marketing messages may go out.
WHERE TO FIND IT	Settings > Marketing > Consent > **Limits** tab (`?tab=limits`).
WHO CAN CHANGE IT	Admin only.
WHAT YOU LOSE IF YOU SKIP IT	It **ships with a default** (quiet 20:00 to 08:00, one email a day, one WhatsApp a week, no journey email on Friday). You lose limits that fit your customers' working days.
HOW TO SET IT UP	1. Open **Limits**. Set **Quiet from** and **Quiet until**, **Emails a day, per person**, **WhatsApp messages a week, per person**, and tap the days on which no journey emails go out. 2. Press **Save**.

OPTIONS

Option	What it does	Default
Limits: Quiet from / Quiet until	Journey emails wait while it is quiet. Same hour for both means no quiet hours.	20:00 to 08:00
Limits: Emails a day, per person	The most journey emails one person gets in a day. 1 to 10.	1
Limits: WhatsApp messages a week, per person	The most marketing WhatsApp messages in any 7 days. 1 to 20.	1
Limits: No journey emails on	Days with no journey email.	Friday
Limits: Timezone (read-only chip)	Follows the timezone in Workforce, Rules. Shows "(default)" if none is set.	Workforce timezone, else the product default

WHAT IT AFFECTS ELSEWHERE

- Journeys and WhatsApp (limits).

CHECK IT WORKED

The timezone chip shows your Workforce timezone (not "(default)"), and a journey email waits during quiet hours.

B18 Lead scoring

Module: the platform-admin module **Consent, lead scoring and hand-over (marketing_scoring)**, which needs Marketing campaigns.

WHAT IT CONTROLS

How a lead earns points and when it is ready for sales.

WHERE TO FIND IT

Settings > Marketing > Leads > **Scoring** tab. URL: `/settings/marketing-leads` . The old address `/settings/marketing-scoring` opens it.

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: eleven behaviour rules and four profile rules, Warm from 20 and Hot from 60. You lose a score that reflects what your buyers really do.

HOW TO SET IT UP

1. Set the three lines: **Warm from**, **Hot from** and **Look back (days)**. A lead below the first line is Cold, from the first line it is Warm, and from the second it is Hot.
2. In the **Rules** table, click a rule to edit it. Press **Add: what people do** or **Add: who they are** to make a new one.

3. For a "what people do" rule: pick **When someone...**, set **Shown as** and **Points** (negative points allowed). Under **More**, set **Fades over (days)** and **Counts up to (a week)**.
4. For a "who they are" rule: set **Shown as**, **Points**, **Matches when** (every line, or any one line), and add lines with **+ Add a line**.
5. Press **Try on a sample lead** to see a score. Nothing is saved or sent.
6. Press **Save**. The rules version goes up when anything that changes a score changes.

OPTIONS

Option	What it does	Default
Warm from	A lead at or above this score is showing real interest. 1 to 99.	20
Hot from	At or above this score a salesperson should call. 2 to 100, above Warm from.	60
Look back (days)	Older activity is ignored. 7 to 365.	90
Rules (behaviour)	Eleven built-in rules, for example: clicked a link in an email +10, said they are interested +30, opened a quote +20, filled in a form +30, replied on WhatsApp +25, came to an event +40, unsubscribed -40.	The built- in set
Rules (profile)	Four built-in rules: OEM account +10, Based in the Gulf +5, Has an active service contract +5, Buyer-type role +10.	The built- in set
Rule: Fades over (days)	Points halve over this time.	Per rule
Rule: Counts up to (a week)	Caps the points a rule can add in a week.	Per rule

WHAT IT AFFECTS ELSEWHERE

- Scored leads and the Leads list (Cold, Warm, Hot labels and "Why this score").
- The Marketing card in Account 360.

CHECK IT WORKED

Try on a sample lead gives the score you expect, and the Leads list shows Cold, Warm and Hot labels with "Why this score".

B19 Lead hand-over

Module: the same module as Lead scoring.

WHAT IT CONTROLS

How a ready lead reaches a salesperson and who hears when it is overdue.

WHERE TO FIND IT

Settings > Marketing > Leads > **Hand-over** tab (`?tab=handover`). The old address

`/settings/marketing-handover` opens it.

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: leads are not made automatically and nobody is told about an overdue lead. With nobody on the turn-taking list, the oldest admin has the leads. You lose automatic hand-over and overdue reminders.

HOW TO SET IT UP

1. Switch **Make a lead when someone becomes Warm** on if you want leads made automatically.
2. Switch on **Tell the owner when a lead is overdue** and **Tell the team lead when a lead is overdue**.
3. Set **Working days to pick up a lead** and tap the **Days off**.
4. Under "When no team covers it, these people take new leads in turn", add people. Order matters.
5. Press **Save**.

OPTIONS

Option	What it does	Default
Make a lead when someone becomes Warm	Checked every 15 minutes, never when a page opens.	Off
Tell the owner when a lead is overdue	A message in the Nova inbox. Each lead is announced once.	Off
Tell the team lead when a lead is overdue	Needs Coverage.	Off
Working days to pick up a lead	After this, a ready lead shows as overdue. 0 to 30.	1
Days off	Do not count towards the response time.	Sunday
Turn-taking list	Used when no team covers the company. With nobody listed, the oldest admin has them. Up to 20 people.	Empty
Teams chip (with Coverage)	Shows how many teams hand out in turn and how many to the team lead. Change it in Coverage.	Read-only

WHAT IT AFFECTS ELSEWHERE

- Lead ownership with Coverage (B15), and the Nova inbox (overdue messages).

CHECK IT WORKED

A lead that becomes Warm appears as a lead within 15 minutes, and an overdue lead shows in the Nova inbox of the owner.

B20 Brand kit

Module: the platform-admin module **Newsletter Studio**.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: the workspace logo, a navy and gold palette and Arial. You lose newsletters in your own colours, fonts, footer address and social links.

WHAT IT CONTROLS

Your logo, colours and email-safe fonts for newsletters, set once and used by every newsletter design.

WHERE TO FIND IT

Settings > Marketing > Brand kit. URL: `/settings/brand-kit` .

WHO CAN CHANGE IT

Admin only. Needs the platform-admin module **Newsletter Studio**.

HOW TO SET IT UP

1. Under **Logo**, upload a PNG, JPG or WebP up to 2 MB. Or press **Use the workspace logo instead**.
2. Under **Colours and fonts**, pick the **Main colour**, **Accent colour** and **Text colour**, the **Font** and the **Tone for AI writing**.
3. Under **Footer and social links**, type the **Address lines** and add social links.
4. Press **Save**.

OPTIONS

Option	What it does	Default
Logo	The newsletter logo.	The workspace logo
Main colour	The email header and the intro banner.	#16365c
Accent colour	Buttons and prices.	#c8892a
Text colour	Body words on white. Keep it dark.	#1c2733
Font	Arial, Georgia or Segoe UI. Arabic uses Tahoma or Segoe UI next to it.	Arial
Tone for AI writing	Formal and courteous, or Warm and friendly.	Formal
Address lines	Shown in the footer above the unsubscribe line. Up to 400 characters.	Empty
Social links	Name and https address. Up to 6. Only https is kept. Shown where a design has a Social block.	None

WHAT IT AFFECTS ELSEWHERE

- Every newsletter design. Changing the kit re-brands a design the next time it is saved. A version already used in a campaign never changes.
- AI drafts and translations (tone).

	Note: the Brand kit colours are an email-only override. They do not follow the workspace accent.
CHECK IT WORKED	A newsletter preview shows your logo, colours and footer address.

B.4 Workforce (the optional tabs and rows)

The Workforce page is described in Part A (A.2). The settings below are the other rows of the same tabs. Each ships with a default.

B21 Punch rules

Module: Workforce.

WHAT IT CONTROLS	How attendance is counted: late marks, breaks, extra punch types, selfies, overtime rate, and how employees sign in.
WHERE TO FIND IT	Settings > Workforce > Workforce > **Rules** tab, and **More** on the same tab. URL: `/settings/workforce` .
WHO CAN CHANGE IT	Admin only.
WHAT YOU LOSE IF YOU SKIP IT	It **ships with a default**: no overtime, no work from home, no site visit, a selfie on check in, check out, breaks and trips, employee self-service on, three late marks to a half-day. You lose overtime costing, remote working punches, alternate Saturdays and your own employment types in the payroll export.

HOW TO SET IT UP

1. Open **Rules**. Set **Late marks per half-day** and **Take breaks off worked hours**.
2. Tick the **Extra punch types** you need. Set the **Selfie with a punch**. If you ticked Overtime, set the **Overtime rate per hour**.
3. Open **More** for employee self-service, sign-in, the landing page, alternate Saturdays and **Employment types**.
4. Press **Save** at the top.

OPTIONS

Option	What it does	Default
Late marks per half-day	Every N late marks in a month count as one half-day in the summary.	3
Take breaks off worked hours	Breaks are always recorded. This only decides whether they come off the daily total.	On

Option	What it does	Default
Extra punch types	Overtime (own session, supervisor approves before pay), Work from home (needs an approved request), Site visit (counts as working time, no approval).	All off
Selfie with a punch	Check in, check out, breaks, trips / Every punch / Never. A denied camera ends the punch.	Check in, check out, breaks, trips
Overtime rate per hour	One flat rate on actual approved minutes. 0 tracks overtime without costing it. Shown with Overtime on.	0
More: Employee self-service	On, or Off, tablet only (no phone punching, a supervisor enrols faces).	On
More: Sign in with	Email address, or User ID (generated ID plus password, no personal email). Admins always use email.	Email address
More: After sign-in, open	Dashboard, or My Workforce.	Dashboard
More: Alternate Saturdays	The 1st, 3rd, 4th and 5th Saturdays use a short shift and the 2nd is a holiday, planned a month ahead. Pick the **Short-day shift**.	Off
More: Employment types	Each type gets its own sheet in the monthly payroll export. The code is made from the label and fixed once saved.	Full-time, Contractor

WHAT IT AFFECTS ELSEWHERE

My Workforce (punching), the Roster, Leave, Corrections, the Monthly Summary and the CA Excel export, which punch options employees see, and the employment type list on Employees.

CHECK IT WORKED

My Workforce shows the punch types you ticked, and the employee's sign-in matches the "Sign in with" choice.

B22 Location rule

Module: Workforce.

WHAT IT CONTROLS

What happens to a punch that is outside every site.

WHERE TO FIND IT

Settings > Workforce > Workforce > **Places** tab, top of the page (`?tab=places`).

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: keep the punch and mark it. You lose the option to reject punches outside the fence, or to refuse a punch with no location. A mode that rejects also refuses a punch with no location at all, with "Location is required for this punch."

HOW TO SET IT UP

1. Open **Places**. Choose what happens **Outside every site**.
2. Switch on **Require location to check in and out** if you want a location on every check in and out (hidden when you choose Reject).
3. Press **Save** at the top.

OPTIONS

Option	What it does	Default
Outside every site	Keep the punch, mark it / Reject the punch / No location check.	Keep the punch, mark it
Require location to check in and out	Refuses check in, check out and breaks outside the area or without a location. Overtime and trips are never blocked. Hidden when you choose Reject.	Off

WHAT IT AFFECTS ELSEWHERE

Which punch options employees see and where the app lets them punch. A punch outside a fence in Reject mode is refused with "You're outside every configured site's geofence — move closer and try again."

CHECK IT WORKED

A test punch away from the site is kept and marked, or refused, as you chose.

B23 Workforce alerts

Module: Workforce.

WHAT IT CONTROLS

The phone reminders and the emails the supervisor and the employee receive.

WHERE TO FIND IT

Settings > Workforce > Workforce > **Alerts** tab (`?tab=alerts`). The old address `/settings/workforce/reminders` opens it.

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: all emails on except late arrival, no phone reminders and no holiday digest. You lose the punch-out and break reminders and the Monday holiday digest.

HOW TO SET IT UP

1. Open **Alerts**. Switch on the phone reminders you want and tick which email each side gets.
2. Press **Save** at the top.

OPTIONS

Option	What it does	Default
Punch-out reminder	Phone push after this many worked hours (net of breaks). 1 to 24.	Off, 9 hours
Break reminder	Phone push when a break runs long. One per person per day. 5 to 240 minutes. A blank wording uses the standard message.	Off, 30 minutes
Holiday digest	One message each Monday naming holidays in the next seven days.	Off
Email grid	Tick which email goes to the supervisor and which to the employee. Late arrival (supervisor); Correction (supervisor on filing, employee on decision); Leave (same); Overtime or work-from-home request (supervisor); Flagged punch (employee); Clarification message (either side).	All on except Late arrival

Phone reminders need the employee to have opened My Workforce and allowed notifications. Email needs email sending set up (see Email output, C1).

WHAT IT AFFECTS ELSEWHERE

Employees, supervisors and the Outbound Emails log (kind "Workforce alerts").

CHECK IT WORKED

A correction request filed by a test employee emails the supervisor (Outbound emails lists it).

B.5 Data

B24 Custom fields

Module: the menu entry shows if any of Accounts, Contacts, Quotations, Cases, Work Orders, Assets, Suppliers, Purchasing, Invoices or Business Roles is on.

WHAT YOU LOSE IF YOU SKIP IT

Records carry only the standard fields. You lose fields such as a machine serial number on an account, and their columns in Data Workbench, the API and the MCP tools.

WHAT IT CONTROLS

Extra fields you add to any object, such as a machine serial number on an account. Each field is stored on the record and shows in the API and the MCP tools automatically.

WHERE TO FIND IT

Settings > Data > Custom fields. URL: `/settings/custom-fields` .

WHO CAN CHANGE IT

Admin only (the page asks the server, and every change is refused for non-admins). The menu entry shows if any of Accounts, Contacts, Quotations, Cases,

Work Orders, Assets, Suppliers, Purchasing, Invoices or Business Roles is on. The tabs on the page show only objects whose module is on.

HOW TO SET IT UP

1. Pick the object tab (for example Account).
2. Press **+ New field**. Type the **Field label**. The key is made from it, such as `cf_machine_serial_number` .
3. Choose the **Field type**. For a dropdown, type the **Options (comma-separated)**.
4. Tick **Required field** if it must be filled in. Press **Add field**.
5. Drag a row by its handle to reorder. Use the row menu for **Rename**, **Make required** or **Make optional**, and **Delete**.

OPTIONS

Option	What it does	Default
Object tabs	Account, Contact, Case, Quote, Standard Quote, Sales Order, Work Order, Asset, Supplier, Product, Inventory, Purchase Order, Invoice, Employee, Project (workforce), Deal (pipeline), RFQ, Estimate, Study, ABM program, ABM target account, ABM buying group member. Each needs its module.	Those your modules allow
Field label	The name shown on forms. Renaming is safe. The key never changes.	Empty
Field type	Text, Number, Date, Dropdown (select), Checkbox (yes/no), Long text.	Text
Options	For a dropdown only.	Empty
Required field	The field must be filled in.	Off

WHAT IT AFFECTS ELSEWHERE

- The record form and detail page of that object, Data Workbench import and export columns, and the v1 API (under `custom_data`) and MCP tools.
- Deleting a field loses every value already captured in it, on every record.

CHECK IT WORKED

The new field shows on the record form and detail page of that object.

B25 Products (categories and item types)

Module: Products or Quotations. The **Item types** tab shows only with the **Products** module.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: with no categories the product form uses free text, and all ten item types are shown. You lose a controlled category tree, filters by category, and a category code that matches your ERP key.

WHAT IT CONTROLS

The category tree products are filed under (two levels), and the kinds of item a product can be.

WHERE TO FIND IT

Settings > Data > Products. URL: `/settings/products` . Item types: `?tab=types` .

WHO CAN CHANGE IT

Admin only. The entry shows with **Products** or **Quotations**. The **Item types** tab shows only with the **Products** module.

HOW TO SET IT UP

1. Open **Categories**. Press **+ New category**. Type a **Name** and a **Code**. Press **Add category**.
2. Click a category to add or rename **sub-categories**, or **Remove** it.
3. Press **Save**.
4. Open **Item types** (with Products). Press **+ New item type**. Type a **Name** and **What it means**. Choose **Used as** (stocked, sold, bought). Press **Add item type**.
5. Click a built-in type to rename it or turn **Shown** off.

OPTIONS

Option	What it does	Default
Category: Name, Code	Records store the code and screens show the name, so you can rename any time. Match the code to your ERP key.	Empty. While empty, the product form uses free text.
Sub-category	One more level under a category.	None
Item types (built in)	Finished product, Semi-finished, Raw material, Bought-out component, Consumable, Custom / made to order, Service, Tool / equipment, Certification / document, BOM / kit.	All ten shown
Item type: Shown	A hidden type is not offered on new products but stays on those that have it. A type that products still carry can be hidden but not removed.	On
Item type: Used as	Stocked, sold, bought. Informational today.	Per type

Only BOM / kit items can have components, whatever types you add.

WHAT IT AFFECTS ELSEWHERE

- The product form, product lists and filters, the catalogue tab on quotes, and any custom field that uses the category list.
- Quotation tenants without the Products module still use the category tree for category fields.

CHECK IT WORKED

The product form offers a category picker, and the list filters by category.

B.6 Appearance

The Appearance page replaced four older pages (Theme & colours, Navigation visibility, Reset layout, Dashboard content). It has three tabs, one draft and one Save. Its address is `/settings/appearance` ; the other tabs are `?tab=menu` and `?tab=dashboard` . The old addresses `/settings/navigation` , `/settings/reset` and `/settings/dashboard` open the matching tab. Admin only. No module flag. Some themes show only if the platform admin switched them on.

B26 Theme and colour

Module: Core.

WHAT IT CONTROLS

The look of the whole workspace on every device.

WHERE TO FIND IT

Settings > Appearance > Appearance > **Theme** tab.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: Classic if unset, Modern for new workspaces, Blue. You lose your own theme and accent.

HOW TO SET IT UP

1. Click a theme tile. Pick a **Colour**. Switch **Compact sidebar** on or off. Open **More** for extra choices that depend on the theme.
2. Press **Save**. A theme change reloads the page.

OPTIONS

Option	What it does	Default
Theme	Classic, Modern, Next-gen. With a platform-admin module: Nova, Enterprise, Spectacular, Spectacular Purple.	Classic if unset; Modern for new workspaces
Colour	One row that follows the theme: Blue, Teal, Orange, Purple, Slate for most themes; Pink, Orange, Purple, Teal, Blue or Custom for Nova; six colour mixes for Spectacular Purple.	Blue
Compact sidebar	Less padding between navigation items.	Off
More (Next-gen)	Sign-in name in the top right; Command palette on Ctrl + K; Navy sidebar in light mode.	On when never saved
More (Spectacular Purple)	Custom shell and accent colours; Reset to violet.	Violet
More (Nova, Spectacular Purple)	Accent for links and tabs.	The workspace accent

WHAT IT AFFECTS ELSEWHERE	The sidebar, the top bar, cards and the dashboard for every user and device.
CHECK IT WORKED	The workspace reloads in the theme and colour you chose.

B27 Sidebar menu

Module: Core.

WHAT IT CONTROLS	Which sidebar items show for the whole workspace.
WHERE TO FIND IT	Settings > Appearance > Appearance > **Menu** tab (`?tab=menu`).
WHAT YOU LOSE IF YOU SKIP IT	It **ships with a default**: every item shown. You lose a tidier sidebar.
HOW TO SET IT UP	1. Switch a sidebar item off to hide it for everyone. A parent bundles its sub-items. Press **Reset to defaults** to show everything again. 2. Press **Save**.

OPTIONS

Option	What it does	Default
Sidebar items	Show or hide each item for the whole workspace. Hidden items can still be opened by their address.	All shown

WHAT IT AFFECTS ELSEWHERE	Hiding a menu item is for tidiness. It is not access control. Use Business Roles (B4) for who reaches what.
CHECK IT WORKED	The hidden item is gone from the sidebar for everyone.

B28 Dashboard

Module: Core.

WHAT IT CONTROLS	What the workspace dashboard opens on, and the optional news and tips cards.
WHERE TO FIND IT	Settings > Appearance > Appearance > **Dashboard** tab (`?tab=dashboard`).
WHAT YOU LOSE IF YOU SKIP IT	It **ships with a default**: Curated on Spectacular, My layout elsewhere; news and tips off. You lose a fixed, ordered set of blocks and the news headlines.
HOW TO SET IT UP	1. Choose what the workspace **Opens on** (Curated or My layout). Switch **Business news** and **Tips and shortcuts** on if you want them. Type up to four news topics.

2 Press **Save**.

OPTIONS

Option	What it does	Default
Opens on	Curated: a fixed, ordered set of blocks. My layout: the saved layout (Adapt and My layout).	Curated on Spectacular, My layout elsewhere
Dashboard look (tender edition only)	Bold (light) or Control room (dark). Each person can still switch it on the dashboard.	Bold
Business news	Headlines for your topics. Needs no accounts, so it has content on day one.	Off
News topics	Up to 4, comma-separated.	"business news India, industrial equipment industry"
Tips and shortcuts	Rotating cards on things the menu does not reveal.	Off
What it affects elsewhere. A person's own dashboard layout is untouched. Switching Curated or My layout does not delete anyone's saved layout. The tenant-wide dashboard layout is adapted on the dashboard itself ("Adapt"), and a personal one with "My layout". Roles can also carry a default dashboard (Business Roles, B4). **Check it worked.** The dashboard opens as you chose.		
Part C. Optional Integrations, connectors, middleware, webhooks, API keys, email output, single sign-on, and anything only some clients need. Do these only when the client asks for them. The read-only logs you use to prove the setup are at the end of this part. **C.1 Email output**		

C1 Email output

Module: Core.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default**: a production workspace sends to the real address on the record, and a demo workspace always redirects. Nothing breaks. The risk is the other way round: a new workspace that is still being tested would email real customers. So set **Send to a specified email address** to your own inbox while you test, and switch to business partners at go-live (see "Setup order").

WHAT IT CONTROLS

Where quotations, invoices, campaigns and workforce notifications are actually delivered.

WHERE TO FIND IT

Settings > Integrations > Email output. URL: `/settings/email-output` .

WHO CAN CHANGE IT

Admin only. No module flag.

HOW TO SET IT UP

1. Choose **Send to business partners** for a production workspace. Email goes to the real address on the account, contact or employee record.
2. Or choose **Send to a specified email address**. Type the inbox under **Redirect everything to**. Every outbound email, from any transaction, goes there instead, with the intended recipient named in the subject and body.
3. Press **Save**.

OPTIONS

Option	What it does	Default
Send to business partners	Uses the real address on the record. For production workspaces only.	On (for non-demo workspaces)
Send to a specified email address	Redirects all output to one internal inbox.	Off
Redirect everything to	The inbox.	Empty

A **demo workspace** is always in redirect mode. "Send to business partners" is greyed out and only the inbox can be changed. This is enforced by the server. No test document can reach a real customer.

WHAT IT AFFECTS ELSEWHERE

- Every email the product sends for the business: quotes, invoices, sales orders, supplier RFQs, inbox replies, campaigns, workforce alerts.
- Outbound Emails (C14) logs what was sent.

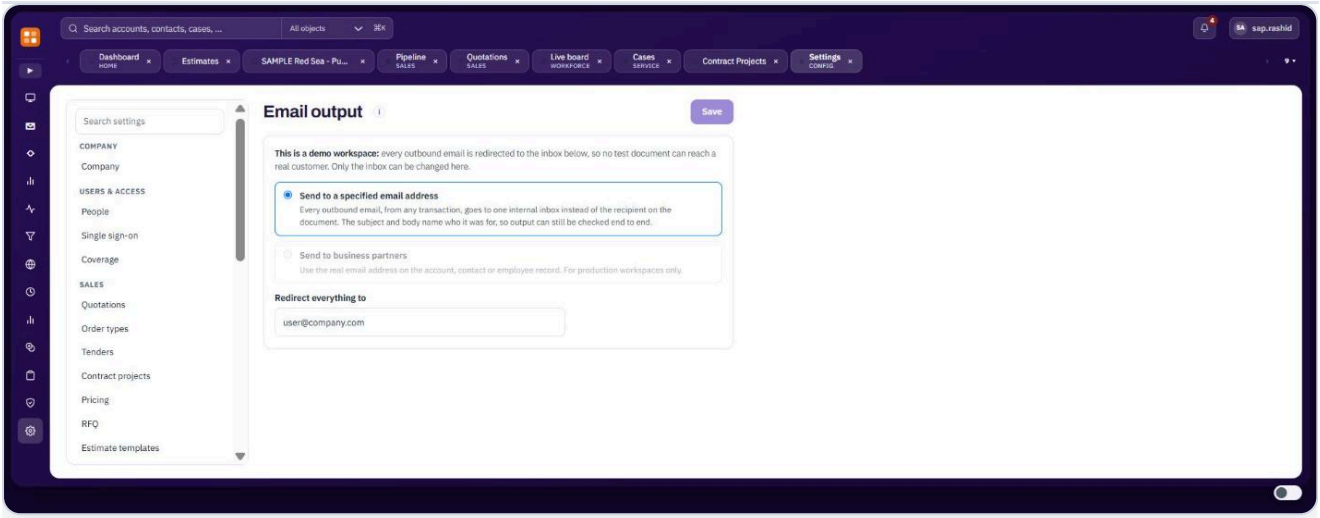


FIGURE 18 The two options and the redirect inbox field.

CHECK IT WORKED Send a test quotation. With redirect on, it arrives in the redirect inbox with the intended recipient named in the subject and body, and Outbound emails (C14) lists it.

C.2 Integrations

C2 Connectors

Module: Core (no module flag). Some tiles need a module: SAP S/4HANA needs Integration middleware, ePROMIS needs GCC tender deals.

WHAT YOU LOSE IF YOU SKIP IT Nothing is connected: quote emails go from BPMSquare's own sender, and RFQ and the Inbox use the platform channels. You lose sending from your own Gmail or mail server, Slack notifications, calendar events and the ERP links.

WHAT IT CONTROLS Connections from BPMSquare to other systems your team already uses.

WHERE TO FIND IT Settings > Integrations > Connectors. URL: `/settings/connectors` . Two connectors have their own pages: Dynamics 365 (`/settings/connectors/dynamics365`) and ePROMIS (`/settings/connectors/epromis`).

WHO CAN CHANGE IT Admin only. No module flag. Some tiles need a module: SAP S/4HANA needs Integration middleware. ePROMIS needs GCC tender deals.

HOW TO SET IT UP

1. Click a tile to open it. Press **Connect**.
2. Fill the fields, then press **Save & connect**.
3. Press **Test connection** to check it. Press **Disconnect** to remove it. Anything relying on it stops at once.

OPTIONS

Connector	What you enter	What it is for
Slack	Incoming Webhook URL	Post BPMSquare notifications to a Slack channel.
Google Calendar	The secret address in iCal format	Read upcoming events from a calendar.
Gmail	Gmail address and a 16-character App Password (needs 2-Step Verification on)	Send quote emails from your own Gmail. A quote can go as a real reply in the customer's thread.
Mail server (SMTP / IMAP)	Email address, username, password, SMTP server and port, IMAP server and port	Your own mailbox for RFQs and Inbox replies.
Microsoft Dynamics 365	Opens its own page; with Integration middleware on, opens the middleware page	Bring customers, contacts, vendors, products and projects in; send won fence projects back.
SAP S/4HANA	Managed on the Integration middleware page	Bring customers, suppliers and products in; read sales orders, deliveries and invoices; check and send Sales Orders.
ePROMIS	Base URL, Sign-in type (API key, bearer token or user name and password), credential, company code, Endpoint map	Read tenders, the Resource Master, cost codes and justifications; send an awarded tender's project and budget.

A password or key is stored encrypted and is never shown again. Leaving the field blank when editing keeps the stored one.

WHAT IT AFFECTS ELSEWHERE

- RFQ (mail channel), Inbox channels (mailbox), and quote email threading (Gmail).
- Integration middleware (Dynamics 365, SAP S/4HANA).
- Contract projects lists (ePROMIS, later).

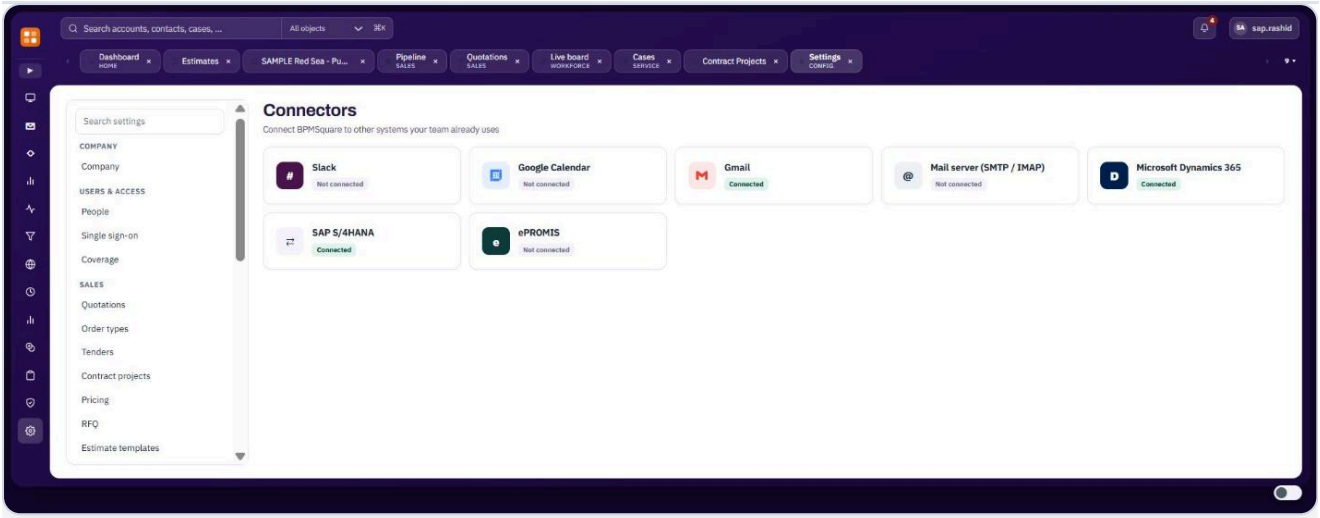


FIGURE 19 The connector tiles with Connected / Not connected pills.

CHECK IT WORKED The tile shows **Connected**, and **Test connection** succeeds.

C3 Integration middleware

Module: the platform-admin module **Integration middleware**.

WHAT YOU LOSE IF YOU SKIP IT

Nothing syncs with your ERP. You lose awarded quotes going to the ERP, customers, suppliers and products read in, the Monitor and Resync.

WHAT IT CONTROLS

Everything about syncing with your ERP in one place: the connection, the links between BPMSquare objects and ERP objects, field mapping, a monitor of every message, and resync from the ERP.

WHERE TO FIND IT

Settings > Integrations > Integration middleware. URL: `/settings/middleware` . The chosen connector is kept in the address (`?connector=`). Tabs: `?tab=links|mapping|monitor|resync` .

WHO CAN CHANGE IT

Admin only. Needs the platform-admin module **Integration middleware**. Without it the address redirects back to Settings.

HOW TO SET IT UP

1. Pick a connector chip at the top (Microsoft Dynamics 365, SAP S/4HANA). Click the open chip to see or change the connection.
2. If there is no connection, press **Connect** . Enter the details (below). Press **Test**.
3. Follow the slim line "Set up 3 of 5 · Next: ..." It shows five checks: Connect, Choose the links, Read customers, Send a test quote, First real quote. For SAP S/4HANA only two apply: Connect and Read customers, because SAP only reads.

4. **Links** tab: each row links a BPMSquare object with one in the ERP. Switch it on. Click the Standard Quote row to choose **Create as** (what the quote becomes in the ERP), **Which webhook** (for a webhook target), a **price list** to use when the customer has none, and what to **Include**. Use **Preview** and **Send a quote now** to try it.
5. **Mapping** tab: choose which document to map, then **Fields** or **Value mapping**. Each line sends one BPMSquare field to one ERP field. Use **Fetch fields**, **Reset to standard** and **Try it**. Value lists turn BPMSquare values into the ERP's codes.
6. **Monitor** tab: filter by status, direction, document and dates. Tick lines and press **Restart**. Open a line with **View request** and **View response**.
7. **Resync** tab: set **Automatic** (Off, Hourly, Daily at 02:00 UTC), use **Sync now** or **Full resync**, narrow each entity with **Scope**, or read **Specific records** by ERP id or send one record.

OPTIONS

Option	What it does	Default
Connection: Product	Dynamics 365 Dataverse, Finance and Operations, or Business Central. Decides what an awarded quote becomes.	Per connector
Connection: Login type	App registration with a client secret is usual. Also certificate, user account, or username and password (Business Central on-premises).	App secret
Connection: Address, Directory ID, Client ID	Where and who.	Empty
Connection: Secret and Secret expires on	Pasted once; stored sealed and shown as Stored. The page warns 30 days before it expires.	Empty
Connection: Company or Legal entity	The company inside the ERP that records are written to.	Empty
SAP: Login type, API host, Communication user, Password or API key	Communication user of an arrangement (scenario SAP_COM_0008, and SAP_COM_0009 for products), or an API key from the SAP Business Accelerator Hub sandbox.	Empty
Keep bodies of inbound pulls and API calls	Keeps the request and answer for 2 days, with personal data and tokens removed.	Off
Link switch	A quote goes to the ERP when it is awarded. A rejected quote never leaves.	Per link
Resync: Automatic	Off, Hourly, Daily.	Off

Option	What it does	Default
Resync: Scope	Reads only records that match every row of conditions. Records outside it stay as they are. Nothing is deleted.	No scope

WHAT IT AFFECTS ELSEWHERE

- Standard Quotes: what is sent on award or rejection, and the ERP number shown on the quote.
- Customers, suppliers, products and projects read in from the ERP (they show an ERP id line on the record).
- Sales Orders: availability and checks with SAP, and the ERP organisation chips on Order types and Coverage.
- Webhooks (Call webhooks), Connectors (tile click goes here), the Monitor, and API call logging.
- Change History records mappings and value lists.

CHECK IT WORKED

The slim setup line reads "Set up 5 of 5" (2 of 2 for SAP S/4HANA), and a test quote shows an ERP number.

C4 Webhooks

Module: the platform-admin module **Webhooks library**.

WHAT YOU LOSE IF YOU SKIP IT

You keep the older page Webhooks and push (C5). You lose the single list of Event and Call webhooks, signing, tests and the log.

WHAT IT CONTROLS

Every address BPMSquare calls, in one list. An **Event** webhook sends changes as they happen. A **Call** webhook sends one record when something fires it: a quote award, a button on an account, or a Coverage route.

WHERE TO FIND IT

Settings > Integrations > Webhooks. URL: `/settings/webhooks` .

WHO CAN CHANGE IT

Admin only. Needs the platform-admin module **Webhooks library**. Without it the address shows "not found" and you keep the older page Webhooks and push (C5).

HOW TO SET IT UP

1. Press **New webhook**. On **Basics**, type a **Name** and choose the **Kind**: Call or Event. The kind cannot change later.
2. For a Call, choose what it **Sends** (Accounts or Standard Quotes, or whatever the server lists). For Accounts you can tick **Button on Accounts**. For an Event, pick **All objects** or tick objects.
3. On **Request**, type the **Address** (https), choose the **Method**, and choose the **Payload**: Standard (a signed record in a fixed shape), Template (your own

JSON with tokens) or Body from mapping. Add **Headers** your receiver expects. Optionally set **Read the id from the answer**.

4. Press **Create**. The panel then gains **Security**, **Test** and **Log** tabs.
5. On **Security**, copy the **Signing secret**. It is shown once. **Regenerate** it if needed, then update the receiver at once.
6. On **Test**, choose a real record and send, or **Preview** the exact request without sending.
7. A webhook that failed 15 times pauses itself. Press **Resume** to start it again.

OPTIONS

Option	What it does	Default
Name	Shown in lists. Up to 80 characters.	Empty
Kind	Call (one record when fired) or Event (every change). Fixed after creation.	Call
Sends	The kind of record a Call sends. Fixed after creation.	Accounts
Changes sent (Event)	All objects, or Quotes, Accounts, Contacts, Cases, Work orders, Invoices, Purchase orders, Inventory, Assets, Suppliers.	All objects
Button on Accounts	Adds a "Send to this webhook" entry to the menu on every account page.	Off
On / Off	Off stops calls but keeps the set-up.	On
Address	The https address. Tokens allowed in the path or query, never personal data.	Empty
Method	GET (no body), POST, PUT, PATCH.	POST
Payload	Standard, Template, or Body from mapping (mapping is built on the Integration middleware Mapping tab).	Standard
Headers	Extra headers such as an API key. After saving a value is hidden and can only be replaced.	None
Send personal data	Switch on only if the receiver needs email, phone or tax numbers.	Off
Wait for an answer (seconds)	How long to wait before the call counts as failed. A failed call is tried once more after 2 seconds.	15
Read the id from the answer	Where the receiver's own number sits in its answer, such as `$.data.number` . Kept and shown on the quote.	Empty
Signing secret	Every call is signed so the receiver can check it came from BPMSquare.	Made on creation

WHAT IT AFFECTS ELSEWHERE

- Integration middleware > Links: the "Which webhook" choice for an awarded quote (Integration middleware, C3).
- Coverage: the "Push this coverage's accounts to" choice (Coverage, B15).
- The account page menu (record button).
- The Monitor on the Integration middleware page shows calls for 2 days.
- A webhook that is in use cannot be deleted. The panel says where it is used.
- Change History records webhook changes.

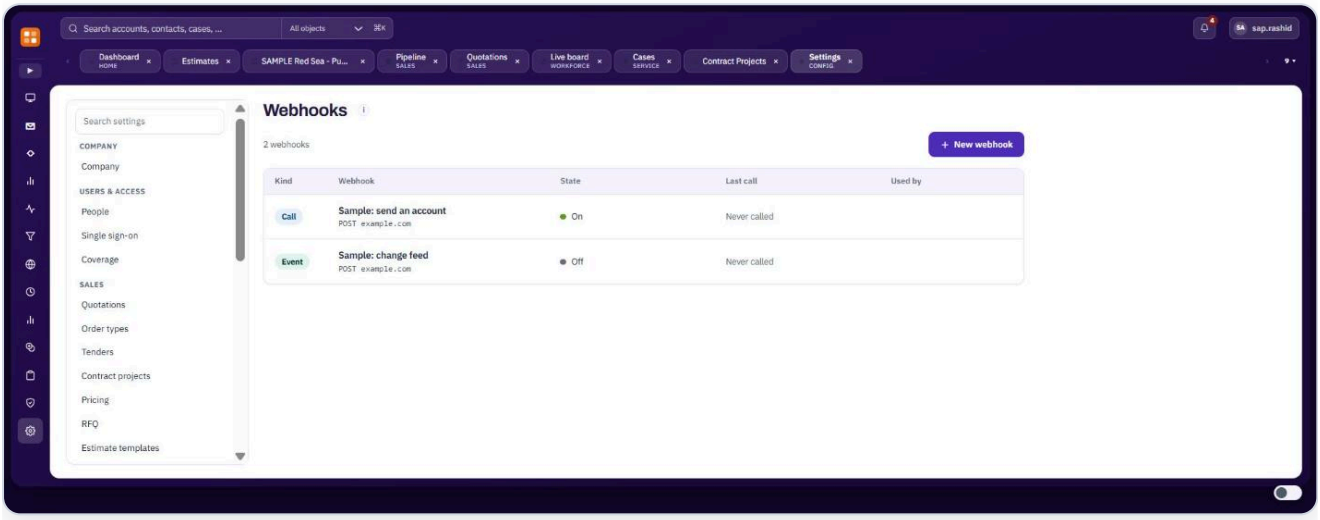


FIGURE 20 The webhooks list with Kind, State, Last call and Used by.

CHECK IT WORKED The **Test** tab sends a real record and the **Log** tab shows the answer.

C5 Webhooks and push

Module: Core (no module flag). Hidden when the Webhooks library is on.

WHAT YOU LOSE IF YOU SKIP IT No event webhooks and no "Push to ERP" action on an account.

WHAT IT CONTROLS The older way to send data out: Event webhooks, and pushing one record to your ERP on demand with the "Push to ERP" action on an account.

WHERE TO FIND IT Settings > Integrations > Webhooks & push. URL: `/settings/push` .

WHO CAN CHANGE IT Admin only. No module flag. This entry is hidden when the Webhooks library is on. The address then redirects to Webhooks (C4).

HOW TO SET IT UP

1. Under **Webhooks**, press **+ New webhook**. Type a **Name** and an **Endpoint URL**. Choose **All objects** or tick objects. Press **Create webhook**. Use **Pause** or **Resume** on a row, and **Delete**.
2. Under **Push to external systems**, type the **Receiving URL**.

3. Under **Signing secret**, press **Generate** (or **Regenerate**, which stops the old one at once). The real value appears only once, right after Generate or Regenerate, with a **Copy** button: "Copy it now. It is not shown again." Copy it to the receiving end. Afterwards the screen only shows **Set**.
4. Press **Save**.

OPTIONS

Option	What it does	Default
Webhook: Name, Endpoint URL	Where each create, update or delete is sent, signed with HMAC-SHA256 in the `X-BPMSquare-Signature` header. Only events after registration are sent.	Empty
Webhook: objects	All objects, or Quotes, Accounts, Contacts, Cases, Work Orders, Invoices, Purchase Orders, Inventory, Assets, Suppliers.	All objects
Receiving URL	The ERP or other system that receives a pushed record.	Empty
Signing secret	Signs pushes so the receiver can verify them. Write-only: the screen shows **Set**, and the value is shown once, right after Generate or Regenerate. Without one, pushes are unsigned.	Not generated

Push is live today on Accounts only.

WHAT IT AFFECTS ELSEWHERE

- The "Push to ERP" action on an account.
- Coverage routing to named endpoints (Coverage, B15).
- Replaced by Webhooks (C4) when that module is on.

CHECK IT WORKED

"Push to ERP" on an account is accepted by the receiver, which verifies the signature.

C6 API keys and developer

Module: Core (no module flag).

WHAT YOU LOSE IF YOU SKIP IT

No key exists until you generate one. You lose any integration that calls `/api/v1`, the change feed, `/ask` and the MCP tools.

Keys belong to your workspace only, and only admins can see or manage them. A scoped token is shown once, when you create it, and only a hash is stored. A lost key can only be revoked and replaced. Regenerate the full-access key if it leaks.

WHAT IT CONTROLS

Your full-access API key, scoped keys, and the address of the API reference.

WHERE TO FIND IT

Settings > Integrations > API keys & developer. URL: `/settings/developer` .

WHO CAN CHANGE IT

Admins see and change keys. The menu entry is not marked admin only, so other people who can open Settings see a line asking them to ask an admin. No module flag.

HOW TO SET IT UP

1. To make a full-access key, press **Generate key**. Copy it with **Copy key**. **Regenerate** replaces it. The old one stops at once, and anything using it (an ERP integration, an AI assistant's MCP config) needs the new one.
2. To make a narrower key, under **Scoped API keys** press **+ New key**. Type a **Name**.
3. Tick **Read** and/or **Write**. Leave **All objects** ticked, or untick it and pick objects.
4. Optionally set **Expires**. Press **Create key**.
5. Copy the token at once. It is shown once and never again.
6. Press **Revoke** on a row to stop a key. A revoked or expired key shows a label.
7. Use **Copy address** for the API reference (`/api/v1/openapi.json`). Import it into Postman or your integration tool, and send your key as a Bearer token.

OPTIONS

Option	What it does	Default
API key	One full-access key (read and write, every object).	None until generated
Scoped key: Name	A label. Required.	Empty
Read, Write	What the key may do. At least one is needed.	Read on, Write off
All objects / chosen objects	Deals, Quotations, Accounts, Cases, Inventory, Invoices, Purchase Orders, Pricing (engine), Products, Projects (workforce), RFQs (supplier prices), Estimates (quoted prices, no costs), ABM programs, Standard Quotes, Sales Orders, ABM target accounts (buying-group roles), Employees (staff data).	All objects
Expires	An end date.	No expiry
API reference address	`/api/v1/openapi.json` , listing every endpoint your keys can reach.	Fixed

Employees, contacts, RFQs, estimates, ABM target accounts, tenders and contract projects are reached only when named. "All objects" does not include them. The picker today does not offer contacts, tenders or contract projects.

WHAT IT AFFECTS ELSEWHERE

- Anything that calls `/api/v1` , the change feed, the `/ask` query and the MCP tools.

- A key sees only your workspace, and only the modules you have.

CHECK IT WORKED A call to `/api/v1` with the key as a Bearer token returns your data, and nothing outside the scope you set.

C7 Account 360 external sources

Module: Account 360 (shown to workspaces with the **Nova** experience or the **Spectacular** theme).

WHAT IT CONTROLS External systems that supply extra cards to the Account 360 drawer.

WHERE TO FIND IT Settings > Sales > Account 360 > **External sources**. URL: `/settings/account-360` .

WHO CAN CHANGE IT Admin only.

WHAT YOU LOSE IF YOU SKIP IT The drawer shows only the built-in cards.

HOW TO SET IT UP

1. Under **External sources**, press **+ Add a source**. Type a **Card title** and a **Card id**.
2. Enter the **URL** (https only). It may carry `{account_id}` , `{account_ref}` , `{account_name}` , `{gstin}` , `{city}` or `{email}` , each filled from the account being viewed.
3. Optionally set an **Auth header** (for example Authorization) and **Auth value** (for example a bearer token), and a **Root path** inside the JSON answer.
4. Under **Fields**, press **+ Add field** for each value: a label and a JSON path such as `credit.limit` .
5. Switch the source on. Press **Save**.

OPTIONS

Option	What it does	Default
Source: Enabled	Turns one source on or off.	Per source
Source: Card title, Card id, Root path	Names the card and where in the JSON to read from.	Empty
Source: URL	Fetched by BPMSquare's server, never the browser. Private and internal addresses are refused.	Empty

Option	What it does	Default
Source: Auth header, Auth value	Sent with the request. The value is a secret. After saving it shows as saved. Leaving it blank on a later save keeps it.	Empty
Source: Fields	Label and JSON path pairs.	Empty
What it affects elsewhere. The Account 360 drawer on accounts. Only admins can read the saved auth value. Non-admins never receive it. **Check it worked.** The new card appears in the drawer of an account, with a value from the external system. **C.3 Single sign-on, Workforce extras and logs**		

C8 Single sign-on (Coming soon)

Module: Core.

WHAT YOU LOSE IF YOU SKIP IT	Nothing today. The page is a placeholder.
WHAT IT CONTROLS	Nothing yet. The entry holds its place in the menu until people can sign in through your company identity provider. The email address stays the login id, so nothing needs re-entering when it arrives.
WHERE TO FIND IT	Settings > Users & access > Single sign-on. URL: `/settings/sso` .
WHO CAN CHANGE IT	Admin only. No module flag.
HOW TO SET IT UP	There is nothing to set. The page shows a **Coming soon** label.
OPTIONS	None.
WHAT IT AFFECTS ELSEWHERE	Nothing today. People sign in with their email and password.

C9 Face, passkey and door tablets

Module: Workforce.

WHAT IT CONTROLS	Signing in and punching by face, passkey sign-in, selfie checks and retention, and the door tablet.

WHERE TO FIND IT

Settings > Workforce > Workforce > **Rules** tab, under **More**; and **Places**, in the site panel. URL: `/settings/workforce` . The old address `/settings/workforce/kiosks` opens Places.

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

Staff punch from their phone with a selfie, with no face check and no door tablet. It **ships with a default**: all of these are off.

HOW TO SET IT UP

1. Open **Rules** and then **More**. Set **Face punch** (Off or Door tablet), **Face sign-in**, **Check selfies against the face**, **Keep selfies for (days)** and **Passkey sign-in**.
2. Open **Places** and a site. Register a door tablet by name. Open `/kiosk` on the tablet and paste the code, which is shown once.
3. Press **Save** at the top.

OPTIONS

Option	What it does	Default
More: Face punch	Off, or Door tablet.	Off
More: Face sign-in	Sign in by face. Needs Face punch on.	Off
More: Check selfies against the face	Off, or Flag a mismatch (never blocks a punch).	Off
More: Keep selfies for (days)	Punch selfies are deleted after this.	90
More: Passkey sign-in	Phone fingerprint or Face ID unlocks sign-in. Only a public key is stored.	Off
Tablet: name	Register a door tablet. Open `/kiosk` on the tablet and paste the code, which is shown once.	None

CHECK IT WORKED

The tablet shows as registered and a punch at the tablet is recorded. With employee self- service off, a phone punch is refused: "Punching from your phone is turned off — punch in and out at the office kiosk."

C10 Project billing

Module: Workforce, with **Project Costing** and **Invoices** (the **Billing** tab shows only with all three).

WHAT IT CONTROLS

Charging project hours to a customer, and the draft invoices raised from them.

WHERE TO FIND IT

Settings > Workforce > Workforce > **Billing** tab (`?tab=billing`). The old address `/settings/workforce/employment` opens Workforce > Rules (employment types sit under More).

WHO CAN CHANGE IT

Admin only.

WHAT YOU LOSE IF YOU SKIP IT

It **ships with a default** of zero rates, which means billing is not set up: previews refuse to raise a zero invoice. You lose invoicing of project hours.

HOW TO SET IT UP

1. Open **Billing**. Set **Bill rate per hour**, **Cost rate per hour** and **Invoice due after (days)**.
2. Switch **Draft invoices at month end** on if you want drafts raised on the 1st. Set **Rate by employment type** to override the default per type.
3. Press **Save** at the top.

OPTIONS

Option	What it does	Default
---	---	---
Bill rate per hour	Charged when neither the project nor the employment type sets a rate. 0 means billing is not set up and previews refuse to raise a zero invoice.	0
Cost rate per hour	What an hour costs the business, for margin. Internal only.	0
Invoice due after (days)	Due date on a draft invoice.	30
Draft invoices at month end	On the 1st, each active project linked to an account gets a draft for last month's hours. You still review and send each.	Off
Rate by employment type	Overrides the default per type. A rate on the project wins, then the employment type, then the default.	Blank
What it affects elsewhere. Invoices: draft project invoices. **Check it worked.** The billing preview for a project with hours shows a non-zero amount. **C.4 Logs and checks (no settings)**		

These pages hold no settings. You use them to prove the setup worked.

C11 Deleted records

Module: any of the core CRM modules.

WHAT IT CONTROLS	An audit log of permanently deleted quotes, cases, work orders and accounts: what was deleted, when and by whom. It is a record. You cannot restore from it.
WHERE TO FIND IT	Settings > Data > Deleted records. URL: `/settings/deletion-log` .
WHO CAN CHANGE IT	Admin only to view. Only a platform admin sees **Clear log**. The entry shows if any of the core CRM modules is on.
HOW TO SET IT UP	1. Use the chips (All, Quotes, Cases, Work Orders, Accounts) to filter. 2. Read the columns: Type, Ref / Name, Account, Status / Total, Original created, Deleted at, Deleted by. 3. A platform admin can press **Clear log**, which cannot be undone.
OPTIONS	No settings. It is read-only for admins.
WHAT IT AFFECTS ELSEWHERE	Nothing. The log fills when someone permanently deletes one of the four object types. Other changes are in Change History (C13).

C12 Audit and users hub

Module: Administration hub. These pages are in the sidebar item **Audit & Users**, not in Settings. They are admin only and need their own module switches.

WHAT IT CONTROLS	A home for audit and operations tools that do not belong in Settings.
WHERE TO FIND IT	Audit & Users. URL: `/administration` .
WHO CAN CHANGE IT	Admin only. Needs the module **Administration hub**. Cards: Change History (needs **Change History**), Outbound Emails (needs **Outbound Emails**) and People (needs **Business Roles**; it opens Settings > People). If no card is available the page sends you to the dashboard.
HOW TO SET IT UP	Click a card to open it. The cards you see depend on your modules.
OPTIONS	None. It is a menu of destinations.
WHAT IT AFFECTS ELSEWHERE	Nothing. It only links to Change History, Outbound Emails and People.

	Old addresses `/administration/business-users` and `/administration/business-roles` redirect to Settings > People.

C13 Change history

Module: Change History.

WHAT IT CONTROLS	Nothing. It is a log. It shows every create, update and delete recorded at the moment it happened.
WHERE TO FIND IT	Audit & Users > Change History. URL: `/administration/change-history` .
WHO CAN CHANGE IT	Admin only. Needs the module **Change History**.
HOW TO SET IT UP	1. Choose an **Object** from the dropdown (it lists only objects your modules have). 2. Optionally type a specific record's ID. 3. Read the rows: who, when and what changed. 4. Press the download button for a CSV.
OPTIONS	The object filter includes records such as Accounts, Contacts, Deals, Quotes, Standard Quotes, Sales Orders and order types, Cases, Invoices, RFQs, Estimates, Leads, Inbox emails and channels, Forms, Journeys, Events, Employees, Pricing versions, Coverage teams, segments and assignments, Webhooks, Integration mappings and value lists, Marketing settings, and People and access.
WHAT IT AFFECTS ELSEWHERE	Nothing. Not every setting is logged. Of the settings pages in this guide, changes to Coverage, Currency, Tenders, Contract projects, Consent and Limits, Webhooks, Integration mapping, Inbox channels and pricing versions are recorded. Changes to who can sign in and with what access (logins, roles, Business Roles, locks, password resets, validity) are recorded under "People and access". No log call was found in the code for changes to Roles themselves, Company or Quotations settings.

C14 Outbound emails

Module: Outbound Emails.

WHAT IT CONTROLS	Nothing. It is a log of every email the product tried to send, with the recipient, subject and whether it succeeded.

WHERE TO FIND IT	Audit & Users > Outbound Emails. URL: `/administration/outbound-emails` .
WHO CAN CHANGE IT	Admin only. Needs the module **Outbound Emails**.
HOW TO SET IT UP	1 Choose a channel: All channels, Quote emails, Invoice emails, Sales order emails, Supplier RFQs, Inbox replies, Campaign sends, Workforce alerts, Password resets. 2 Optionally type a Quote or campaign ID. 3 Failed rows show the error. Press the download button for a CSV.
OPTIONS	None. It is read-only.
WHAT IT AFFECTS ELSEWHERE	Nothing. It shows what the Email output setting (C1) and each module's send routes did. Every business email goes through the Email output rule, so a demo workspace shows its redirected sends here.

C.5 Old addresses that still work

Several pages were folded into tabs. The old addresses still open the right place, so saved links keep working.

Old address	Opens
`/settings/general`	Settings > Company
`/settings/entities`	Company, Entities tab
`/settings/currency`	Company, Tax and currency tab
`/settings/number-ranges`	Company, Numbering tab
`/settings/navigation` , `/settings/reset`	Appearance, Menu tab
`/settings/dashboard`	Appearance, Dashboard tab
`/settings/product-categories` , `/settings/sales`	Products, Categories tab
`/settings/item-types`	Products, Item types tab
`/settings/statuses` , `/settings/quote-types` , `/settings/templates` , `/settings/email-templates` , `/settings/asset-print-fields`	Quotations, the matching tab
`/settings/team` , `/administration/business-users` , `/administration/business-roles`	People (Roles tab for roles)
`/settings/marketing-scoring` , `/settings/marketing-handover`	Leads, Scoring or Hand-over tab
`/settings/workforce/attendance` , `/verification` , `/shifts` , `/sites` , `/kiosks` , `/leave-types` , `/reminders` , `/employment`	Workforce, the matching tab (employment types now sit in Rules, More)

Old address	Opens
`/settings/pricing-engine`	The Pricing workspace
`/settings/connectors/dynamics365`	Integration middleware (when it is on)
`/settings/push`	Webhooks (when the Webhooks library is on)

Setup order

One numbered run through all three tiers, in the order a consultant should do them. It follows the provisioning runbook. Steps 1 to 3 are done by the BPMSquare team. The rest are done by your admin or the implementation consultant. Skip a step only if its module is not in the workspace. When every A row of your modules is ticked in the master checklist, the workspace works.

Before the workspace exists

1. **Decide.** Shared database (the default) or a dedicated instance. The module package (for example Workforce only, or full CRM with the sold extras). The currency. A provisioning admin email, as a plus- alias of the operator's address so it makes a new login (A1, A2).
2. **Create the workspace** (A1): name, short permanent code, the domain people sign in at, accent colour, currency, plan, the first admin and the modules. The Tenant Creation Studio can draft this from a plain description. Experimental flags (Nova, Enterprise, Spectacular) are set by hand only.
3. **Connect the domain** (A1): add the domain in the hosting project, add the DNS record, wait for "Valid Configuration", and allow the address in the sign-in redirect list. The workspace is unreachable until this is done. Do not sign in while the certificate is still being made.

First sign-in, then the Core must-haves (Part A)

4. **First sign-in and scoping check** (A2). The first admin signs in with the initial password and is forced to choose a new one. Check that the sidebar shows only the modules you bought, the Settings menu has no pages for absent modules, and Global search lists only your objects. The dashboard starts nearly empty for a scoped workspace. That is correct. Use Adapt on the dashboard to install the module's widgets.
5. **Email output** (C1): set **Send to a specified email address** to your own inbox, so no test email can reach a real customer. Switch it at go-live (step 28).
6. **Tax and currency** (A4). Do this before you load any data.
7. **People** (A3). Add your own admin in Settings > People > Invite with role **Admin**. Then remove the provisioning alias login and any plain-email login the platform admin used. Every other person is created inside the workspace, not from Admin > Tenants. Add staff the employee-first way (Employees > add the employee > **Create login**); for many people use the Data Workbench Employees then Users imports. Copy the details from the result screen and hand them over: they are not shown again.

The module must-haves (Part A), only the modules you bought

8. **Workforce** (A5 to A10), in this order: timezone and weekly off days (A5), shifts (A6), sites and their supervisors (A7), leave types (A8), holidays on the Leave & Holidays screen (A9), then the WFM role, shift, home site and supervisor of each employee (A10) and their logins (A3).

9. **Tenders** (A11): choose the approvers, or switch on self-approval in a one-admin workspace.

10. **Estimates** (A12): add a starter template and copy it, or build one. 11. **Shared Inbox** (A13): add the first channel and forward the company mail to its address. 12. **Saudi e-invoicing** (A14): complete the seller details of the legal entity, and set the currency to SAR. 13. **Service**: nothing to set (A.7).

Nice to have (Part B)

14. **Company** (B1 profile and letterhead, B2 legal entities, B3 numbering). 15. **Sales:** Quotation statuses, offer types, templates and print fields (B5 to B8), Order types (B9), Pricing

rate card (B10), RFQ (B11), Tender pricing defaults (B12) and Contract project lists (B13), then Coverage (B15) and Account 360 cards (B14).

16. **Business Roles** (B4), then tick them on each Member in People (A3). 17. **Marketing:** Consent (B16), Limits (B17), Lead scoring (B18), Lead hand-over (B19), Brand kit (B20). 18. **Workforce extras:** punch rules (B21), the location rule (B22), alerts (B23). 19. **Data:** Custom fields (B24), Product categories and item types (B25). 20. **Appearance:** theme (B26), sidebar menu (B27), dashboard (B28).

Optional (Part C), only when asked

21. **Connectors** (C2): Gmail or a mail server, Slack, calendar, Dynamics 365, SAP S/4HANA, ePROMIS. 22. **Integration middleware** (C3), then **Webhooks** (C4) (or the older Webhooks and push, C5). 23. **API keys** (C6): the full-access key and scoped keys. 24. **Account 360 external sources** (C7). 25. **Workforce extras:** face, passkey and door tablets (C9), project billing (C10). 26. **Single sign-on** (C8): not available yet.

Go live and hand over 27. **Walk the master checklist.** Every A row of your modules is ticked, and each "How to confirm it is

done" is true.

28. **Email output** (C1): switch to **Send to business partners** for a production workspace. 29. **Check the logs:** Change History (C13) and Outbound Emails (C14) show what was done and what was

sent.

30. **Hand over.** Make sure the provisioning alias login and any plain-email membership are gone (A2, A3).

The platform admin can always re-enter for support.

Common questions

1. Why is a Settings page in this guide missing from my menu? The module behind it is not switched on for your workspace, or you are not an admin. Only the BPMSquare team can switch a module on. Ask them. The menu search will not find a page your workspace does not have.

2. What is the difference between an Admin and a Business Role called "Admin"? The workspace role **Admin** is set in Settings > People. It reaches everything and is not limited by roles. Business Roles such as "Sales Admin" are sets of areas with Create, Edit and Delete. They apply to Members only and do not make anyone a workspace admin.

3. Can I use Business Roles to keep information away from a colleague? No. Business Roles hide menu items and dashboards. They are not a data boundary, and the data routes do not check them. Hiding a sidebar item in Appearance is also not access control, because a hidden item still opens by its address.

4. I gave someone a password. Will they be asked to change it? Yes, whenever your add created a new login with that password: Invite with a password, Employees > Create login, the Data Workbench Users import, or Reset password. They choose their own at the first sign-in. If the email already had an account on the platform, that account is linked and keeps its own password, and nobody is forced to change anything.

5. A person left. What should I do? Open their row in Settings > People. Press **Lock** to stop them at once, or set **Valid to** in the Validity section. Use **Remove** to take them out of the workspace. The Changes section keeps a record of what you did. Their login is not deleted. Keep an admin in the workspace, because you cannot lock or remove yourself.

6. I changed the currency. Did my amounts convert? No. The currency only relabels figures. Set it before you load data.

7. A key leaked. What now? Open Settings > Integrations > API keys & developer. For the full-access key, press **Regenerate**. The old key stops at once. For a scoped key, press **Revoke** and make a new one. Then update anything that used the old key.

8. I hid an offer type or removed a status. Did old quotes change? Hiding an offer type removes it from the New Quotation picker only. Quotes already made keep their type. For statuses, the page stops you removing the starting status or the last one, and it needs at least one closed status. It does not check whether quotes still use a status, so rename a status rather than remove one that is in use.

2

CHAPTER 2

Sales and tenders

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i 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 marked "" 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 sales managers, bid managers, buyers, finance staff and the consultants who set Sales up. It follows two journeys. The first is an ordinary sale: a deal becomes a quote, an order and an invoice. The second is the GCC tender edition: a tender arrives, the team decides to bid, prices a bill of quantities, submits and revises the bid, wins it, runs the contract project and buys out the work.

The examples use a made-up customer, Example Trading LLC. In the sales journey it buys equipment. In the tender journey it invites tenders for site works.

How Sales is laid out

Sales lives in the left menu under **Sales**. It has ten items: Pipeline, Estimates, Fence Projects, RFQs, Quotations, Standard Quotes, Sales Orders, Purchase Orders, Contract Projects and Invoices. Tenders are not a menu item. They are a tab inside **Pipeline**. Buy-out is a tab inside a **Contract Project**. The tender blocks on the home screen are part of the **Dashboard**.

Accounts, contacts, suppliers, products and inventory sit under **Master data**. They are in Chapter 6. Service is in Chapter 3. Marketing is in Chapter 5. Every setting named here is explained in Chapter 1.

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. 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.

The whole tender edition hangs on one switch, **GCC tender deals**. Three more switches add parts of it: **Deal Room** (the Room tab), **Contract projects** (the project after the award) and **Shared Inbox** (tenders that start from an email).

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1. Deals and Pipeline
2. Tenders
3. Bill of quantities
4. Costing a tender
5. Bid, versions and outcome
6. Room, calls and competitors
7. Tender blocks on the Dashboard
8. Estimates
9. RFQs and supplier quotes

10. Quotations 11. Standard Quotes and templates 12. Sales Orders and order types 13. Purchase Orders 14. Contract projects 15. Buy-out packages 16. Invoices 17. From enquiry to invoice 18. Common questions

Not in the product

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

- A settings page for deal stages or tender stages. Tender stages are fixed. Deal stages are the five standard ones unless BPMSquare loaded others for your workspace.
- Sending a bid to a tender portal such as Ariba. **Submit bid** saves a numbered version inside BPMSquare. You upload the priced Excel or copy the answer sheet yourself.
- Raising a purchase order from a buy-out package. The package gives you an Excel. The purchase order is raised in ePROMIS or your ERP. The **Send to ePROMIS** button on the project Handover tab is switched off.
- Email, PDF or WhatsApp for a Purchase Order. A Purchase Order can only be marked as sent.
- A "Create sales order" button on a deal or in the Inbox. The button exists on an accepted Standard Quote and on a won Quotation only.
- An internal or external pricing switch on a quote. That choice lives on the order type (Sales Orders).
- Assistant "create" cards for deals, tenders, quotes, orders or invoices. At this snapshot the assistant can propose only an account and a contact (see Chapter 6).
- Sending a Saudi e-invoice to ZATCA. Only the data checks and the bilingual document exist.
- Fence Projects, the Process Design Studio and the Inbox screen itself. They are not described in this chapter.

1. Deals and Pipeline

What it is

A deal is one sale you are chasing with one account. Pipeline shows every deal as a card in a stage, with its value and its chance of winning. A deal holds the lines you plan to sell and the quotes made from them.

Where to find it

Sales > Pipeline (`/pipeline`). New deal: **+ New Deal** (`/pipeline/new`). A deal opens at `/pipeline/<id>` .

Who uses it and which module switches it on

Sales representatives and sales managers. Module: **Pipeline**. Business role entry: **Pipeline**. When the tender edition is on, the page has two tabs, **Deals** and **Tenders**. The Deals tab never shows tender deals (see section 2).

How to use it

Create a deal

1. Select **+ New Deal**.
2. Enter a **Title** and choose the **Account**. Both are required.
3. Optionally choose the **Contact** (it lists the account's contacts), the **Stage**, the **Expected close** date, the **Owner**, the **Source** and the **Competitor**. Add a **Description** if you want.
4. Select **Save**. The deal opens with a reference like `OPP-0001` . You are the owner unless you chose someone else.

Work the board

1. The top line shows **Open** (the value of all open deals) and **Weighted** (value times chance).
2. Each stage is a column. A card shows the title, the account, the amount, the chance in percent, the days spent in the stage and the owner's initials.
3. Drag a card to another column to change its stage. Dropping a card on a closed stage opens the close dialog (see Close a deal).
4. Use **Every owner** and **Every account** to filter. Tick **Show closed** to see the closed columns. **Board** and **List** switch the drawing.

Work one deal

1. On the **Overview** tab you can change the title, contact, expected close date, owner, source, competitor and description. **Probability override %** replaces the stage's chance. If you override it, fill in **Why the override**.
2. Under **Team** select **+ Add someone**. Pick a person and a role: Owner, Sales, Technical or Knows the customer.
3. On the **Lines** tab, add lines from **Catalog**, **Previous quotes** or **Free text**. The add panel asks whether to include quantity breaks and alternatives. Select **Save lines**. The tab shows "Unsaved changes" until you do.
4. On the **Quotes** tab, read the quotes made from this deal. The newest is marked "latest".
5. When the RFQ module is on, the **Related** tab lets you ask suppliers for prices on the deal's lines.
6. The **Activity** tab shows every change.

Turn a deal into a quote

1. Save the lines first. The quote is made from the saved lines.
2. Select **Convert to Standard Quote**. The lines are copied and product lines are priced again on today's date. The new quote opens.
3. Section 11 continues from there.

Close a deal

1. Change the **Stage** in the header, or drag the card. Or use **Mark won** or **Mark lost** (**More** menu on the deal).
2. In the dialog choose **Won**, **Lost** or **Dropped**.
3. For Lost and Dropped, choose a reason and add a note if you want.
4. Select **Confirm**. A closed deal can be opened again from **More > Reopen**.

Statuses

Default stages. A workspace can have its own list.

Stage	Chance shown	Meaning
Qualify	20%	First stage. Is it a real opportunity?
Propose	50%	An offer is being made
Negotiate	75%	Terms are being discussed
Won	100%	Closed. Outcome Won
Lost	0%	Closed. Outcome Lost

A closed deal also carries an outcome: Open, Won, Lost or Dropped. Reasons for Lost and Dropped are Price too high, Went silent, Chose competitor, Budget cut, Bad timing and Other.

Links to other records

- **Account** and **Contact**.
- **Standard Quotes** and **Quotations**: the Quotes tab. A Standard Quote can also be linked from its own page (**Link to a deal**) or can start a deal (**Create deal from this quote**).
- **RFQs**: the Related tab.
- The connected system's record, when an ERP is linked (shown as a read-only line under the facts).

Good to know

- The deal **Amount** is the pre-tax subtotal of the latest linked quote. With no quote it is the total of the deal's lines.
- Accepting a linked Standard Quote closes the deal as Won, but only if the deal is still open. Rejecting the quote changes nothing on the deal. Marking a Quotation Won does not close the deal.
- If a Bill of quantities upload changes the lines while you are editing them, the Lines tab says so and offers **Load the current lines**. Your unsaved edits cannot be saved over the new lines.
- **Delete** (More menu) removes only the deal. Linked quotes stay.

- Deals can be imported, exported and updated in Data Workbench (a Record ID from an export is needed for updates). The v1 API has a read-only deals endpoint.

2. Tenders

What it is

A tender is a deal with extra facts: the tender number, who issued it, how it came in, the bid end date, a bid decision that a manager approves, and a bid guarantee. Tenders have their own stages and their own deal page with six tabs. They are kept apart from ordinary deals.

Where to find it

Sales > Pipeline, tab **Tenders** (`/pipeline?tab=tenders`). New tender: **+ New tender** (`/pipeline/new/tender`). A tender opens at `/pipeline/<id>` , the same address pattern as a deal. In the Inbox, **Create from this email > Deal** makes a tender.

Who uses it and which module switches it on

Bid managers, estimators, sales directors and the people who approve bids. Module: **Pipeline** plus **GCC tender deals**. Business role entry: **Pipeline**. A person needs edit access to Pipeline to change a tender. Who approves a bid is chosen in **Settings > Sales > Tenders** (Chapter 1, section 5.3).

How to use it

Start a tender

1. Open **Pipeline**, choose the **Tenders** tab and select **+ New tender**.
2. Choose the **Account**. It is the only required field.
3. Optionally fill in **Tender number** (it must be unique in your workspace), **Issuer**, **Portal** (Ariba, Email, Excel or Other), **Bid end date** (date and time) and **Source**.
4. Select **Save**. The tender opens in the first stage, Received. Its title is built from the tender number, the issuer and the account name.

Read the Tenders tab

1. **Bids ending soon** lists open tenders whose bid ends within 14 days, soonest first. A tender already past its end date comes first. Five rows show. Select **Show all** for the rest.
2. The chip on a row is red when two days or fewer are left or the date has passed, amber under seven days, otherwise plain.
3. Below it, the board works like the Deals board, with tender stages. A card shows the bid end chip, the tender number and "N new in Room" when the Deal Room has unread messages.
4. Links from the Dashboard open this tab already filtered. The chips above the board say what is filtered (a stage, "Closing in 14 days", one client, Won or Lost, a month). **Show all tenders** clears them.

Decide: bid or no bid

1. On a new tender the main button reads **Propose bid decision**.
2. Choose **Go** or **No-go**, type the reason (required) and select **Ask for approval**.

3. While a proposal waits, the button reads **Review bid decision** and the marker beside the stage reads "Awaiting approval". An approver opens it and selects **Approve** or **Reject**. A rejection needs a comment. The proposer can **Withdraw proposal**.
4. An approved Go moves the tender to Estimating by itself. An approved No-go closes it as No-bid. A rejection returns it to Bid/No-bid.
5. The person who proposed cannot approve, unless the workspace allows self-approval in Settings.

Fill in the Overview

1. A strip at the top shows the bid end countdown, the decision, the guarantee, the open questions and the overdue next steps.
2. **What the client asked for** holds the title, tender number, issuer, issuer account, portal, bid end date, contact, owner, source, description and team. Select **Save**.
3. **Documents** shows the email the tender came from and its files (when it came from the Inbox). **Change requests** counts the addenda the issuer has sent. Use **+** each time one arrives, then **Save**.
4. **Open work** shows three buttons: open Room questions, overdue next steps and lines without a price. Each opens the place to deal with it.
5. **Bid guarantee** holds **State**, **Amount**, **Currency** and **Valid until**. Select **Save**. Select **Release** when the issuer hands the guarantee back.

Follow the main button

The one big button in the header follows the stage. It always says what comes next.

Stage	Main button
Received	Propose bid decision, or Review bid decision while one waits
Bid/No-bid	Review bid decision while one waits, otherwise Propose bid decision
Estimating	Submit bid, or Revise bid once a version exists
Submitted, Clarifications	Record the outcome
Awarded	Create contract project, or Open contract project once it exists
Lost, No-bid	None

The header **More** menu holds **History**, **Mark won**, **Mark lost**, **Reopen** and **Delete**.

Statuses

Tender stages are fixed.

Stage	Chance shown	Meaning
Received	10%	Arrived, not yet decided
Bid/No-bid	15%	A decision is being proposed or approved
Estimating	25%	Pricing the bill of quantities
Submitted	40%	A bid version has gone in

Stage	Chance shown	Meaning
Clarifications	50%	The issuer is asking questions
Awarded	closed	Won. Outcome Won
Lost	closed	Outcome Lost
No-bid	closed	Decided not to bid. Outcome Dropped

The bid decision shows as Go or No-go, with the proposal states Waiting, Approved, Rejected and Withdrawn.

The bid guarantee has four states: **Requested** (asked from the bank), **Issued** (the bank has issued it), **Submitted** (handed in with the bid) and **Released** (handed back). Within 30 days of its valid-until date, an unreleased guarantee turns amber, and red once expired.

Links to other records

- **Account** and **Issuer account** (the Overview offers **Open**).
- **Inbox email** the tender came from, with its files.
- The **Bill of quantities** file and the **Estimates** and **RFQs** that price it.
- **Bid versions** and the **Standard Quotes** made from them.
- The **Contract project** made after the award.
- **Suppliers**: a client's approved supplier group limits every supplier list (Chapter 6, section 9).

Good to know

- Reminders go by email to the owner and the team 7, 3 and 1 days before the bid end date and on the day. They stop when the bid is submitted or the tender is closed. Changing the bid end date restarts them. They appear under **Outbound emails**.
- The stage drop-down in the header can move a tender by hand. Two rules hold. Going to No-bid needs an approved No-go. Going from an early stage into Estimating or later needs an approved Go.
- A decision saved before approval existed is shown as "Recorded before approval was required". It does not unlock the next stage.
- The tender number is checked for duplicates when you save it.
- Tender deals have no Lines, Quotes, Related or Activity tab. Lines are the Bill of quantities, quotes are made on the Bid tab, and Activity is **History**.



FIGURE 21 The header with stage, bid decision, bid end date and bid guarantee, and the Overview blocks.

3. Bill of quantities

What it is

The bill of quantities (BOQ) is the client's price list for the tender: one row per item. BPMSquare reads the client's Excel, keeps their item numbers and shows every row with its source, cost, markup, rate and amount in one table.

Where to find it

Sales > Pipeline, open a tender, tab **Bill of quantities** (`/pipeline/<id>?tab=boq`).

Who uses it and which module switches it on

Estimators and bid managers. Module: **Pipeline** plus **GCC tender deals**. Business role entry: **Pipeline**. Cost and markup are internal. They never appear in anything sent to the client.

How to use it

Upload the client's file

1. Select **Upload BOQ (.xlsx)**. The file may be up to 15 MB.
2. The card **How the file was read** shows the sheet, the header row and a column for each field. Change any of them. The choice is remembered for the next upload.
3. If the file has no rate or amount column, the system adds them after the last column and says so.
4. Select **Create the deal lines**. Nothing is created until you do. **Cancel** throws the file away.

Update after a revised file

1. Select **Upload revised BOQ**.
2. The card shows what changed compared with the BOQ on the deal. Lines are matched by item number.
3. Select **Update the deal lines**. A priced line that is no longer in the file is kept and flagged. An unpriced one is removed.

Read the table

1. The tiles show **Lines** (with the file name and version), **Priced** (in percent) and **Total** (at cost plus markup).
2. The columns are Item, Description, Qty, Unit, Source, Cost, Mk (markup), Rate, Amount and Linked.
3. The filter buttons **All**, **Unpriced** and **Stale** show their counts. **Show N more** pages the table.
4. A line with a price older than your limit is marked stale in amber.

Match rows to products

1. If rows have no product, a chip reads "N lines without a product". Open it.
2. Each row lists up to three suggestions. Accept one, search for another product or leave the row as free text.
3. **Accept N strong matches** links only the clear ones in one go.

Price the rows

1. Check the **Markup on cost %** box. It starts from the workspace default.
2. Select **Price all lines**. Rows that have no rate get one from the first fresh source: a supplier price, then a bill of materials, then a past project.
3. Rows it cannot price are listed under **Left unpriced** with the reason.
4. To price one row, select it. The panel lets you change **Description**, **Quantity** and **Rate**, and shows where the cost came from. **Open in Costing** jumps to the Costing tab.
5. The panel lists the price sources found for the row. A stale one can be used only if you choose it knowingly.
6. **Price from estimate** and **Build up this rate** start from an estimate when the Project Estimator is on (section 4).

Statuses

A row has no status of its own. It has a price source:

Source	Meaning
Client's rate	The rate that came in the client's file
BOM / estimate	A bill of materials roll-up or a line of an estimate
Past project	The rate on an awarded tender of yours with the same cost code, product or wording
Supplier	An awarded RFQ price, or the product's own cost price
Tender estimate	A cost set from an estimate made for this tender
Manual	A rate you typed. The source it replaced is kept

Row chips also show Estimate, RFQ, Unpriced and Stale.

Links to other records

- **Products**: the "Linked" column (Chapter 6, section 10).
- **Estimates** and **RFQs**: shown as chips on the row.
- The deal's own **lines**: a tender's lines are its BOQ rows. A tender with no uploaded file shows its lines for editing by hand.

Good to know

- A supplier or past-project price older than **Price validity** (180 days unless changed) is stale. It is never applied by itself. Set it in **Settings > Sales > Tenders** (Chapter 1, section 5.3).
- "Price all lines" starts from the **Default markup** in the same page. A markup you type here is kept in your browser for this tender only.
- A supplier is awarded only on the Costing tab. The row panel shows the result but cannot change it.
- Rows keep the client's item numbers and cost codes exactly as written.
- The downloads of the priced Excel and the answer sheet are on the Bid tab (section 5).
- A comment in the product calls this screen a "Prices tab". There is no such tab. Prices are on the Bill of quantities and Costing tabs.



FIGURE 22 The tiles for lines, share priced and total, with the upload and price-all actions.

4. Costing a tender

What it is

Costing is the place where BOQ rows get their cost. It lists every estimate and every RFQ made for the tender, shows which rows each one prices, and holds the compare-and-award screen where a supplier's price becomes a row's cost.

Where to find it

Sales > Pipeline, open a tender, tab **Costing** (`/pipeline/<id>?tab=costing`).

Who uses it and which module switches it on

Estimators and buyers. Module: **Pipeline** plus **GCC tender deals**, and at least one of **Project Estimator** or **RFQ (supplier quotations)**. The tab is hidden if neither is on or your role cannot view Estimates or RFQs. Business role entries: **Pipeline**, **Estimates**, **RFQs**.

How to use it

Read the tab

1. The tiles show **Rows priced**, **Still need a cost**, **RFQs out** and **Replies in**.

2. If rows still need a cost, **Show them in the Bill of quantities** opens the table filtered to them. Old prices have a **Show them** link too.
3. **Estimates and RFQs** is one list. A row shows its type (Estimate or RFQ), a state, the BOQ rows it prices, its total and its age. **Show all N** pages the list.

Build up a price with an estimate

1. Select **New estimate**, choose a **Template** and select **Start estimate**. The estimate opens linked to this tender (section 8).
2. Back on the Costing tab, select **Price the BOQ rows** on the estimate. In the panel choose **Match by**: "Cost code and wording" or "Spread one part over the rows". Choose **Share by** BOQ amount or BOQ quantity. Set the **Markup %**.
3. Tick the rows. The panel shows Allocated and Unallocated cost. Nothing is saved until you confirm.
4. From a single BOQ row, **Build up this rate** starts an estimate with that row's quantity filled in.
5. If the estimate changes later, the row shows "Changed, re-price". Select **Re-price**.

Ask suppliers for prices

1. Select **New RFQ**. The items come from the rows without a rate.
2. Choose the suppliers, a reply date and a note. If the client has an approved supplier group, only its members are offered.
3. Send. Each supplier gets an email with a link to answer without logging in.
4. When replies arrive, select **Compare and award** on the RFQ row.

Compare and award

1. The screen shows one column per supplier and one row per line. The lowest valid price is marked **Lowest valid**. An expired or old answer is marked **Expired or stale**.
2. Select **Award and price** on a supplier's price, or award several lines to one supplier.
3. In the panel set the **Markup %** (it starts from the workspace default) and, for a foreign currency, the **Exchange rate**. If the price is not the lowest valid one, **Why this supplier?** is required.
4. Select **Award and price**. The supplier's price becomes the row's cost, the markup is added, and the source is set to the RFQ. A cost of 38.00 at 15% gives a rate of 43.70.
5. If lines were awarded but their rows carry no price yet, **Price awarded rows** writes cost, markup and source.

Statuses

Estimate rows show one of: Changed, re-price; N costs missing; Quoted; Won; Applied; Not used yet.

RFQ rows show one of: Draft; Sent; N of M replied; N of M awarded; Awarded; Closed; Cancelled; No suppliers.

Links to other records

- **Estimates** (section 8) and **RFQs** (section 9). Each row opens its record.
- **BOQ rows** that the item prices.
- **Suppliers** and the client's **approved supplier group** (Chapter 6, section 9).

Good to know

- A tender RFQ is awarded here only. The RFQ's own page says so and links back.
- Once a bid has been submitted, awarding or re-pricing asks "The bid is already in". The new rate goes on the row. The submitted version stays as it was.
- Cost and markup are internal. They are never in the priced Excel, the answer sheet, a bid version or a quote.
- A supplier without an email address cannot be sent a request. The message names the supplier.
- The RFQ mail channel, reply days and reminders are set in **Settings > Sales > RFQ** (Chapter 1, section 5.6).



FIGURE 23 The four tiles (rows priced, still need a cost, RFQs out, replies in) and the Estimates and RFQs list.

5. Bid, versions and outcome

What it is

The Bid tab saves each bid you send as a numbered version that never changes, compares versions, produces the documents you send to the client and ends with the outcome: awarded, lost or no bid.

Where to find it

Sales > Pipeline, open a tender, tab **Bid** (`/pipeline/<id>?tab=bid`). The tab shows the number of versions.

Who uses it and which module switches it on

Bid managers. Module: **Pipeline** plus **GCC tender deals**. Business role entry: **Pipeline**. Making a Standard Quote also needs **Standard Quotes**.

How to use it

Submit the bid

1. Price the lines first (sections 3 and 4).
2. Open the **Bid** tab. **Before you submit** lists what is open: lines without a price, old prices, no approved Go, a guarantee not yet marked Submitted. These are warnings. You can always go on.

3. Select **Submit bid**. For version 1 nothing else is asked. From version 2, **Why is the bid revised?** is required. **Note** is optional.
4. Select **Submit version N**. The lines and the total are saved. The tender moves to Submitted.

Revise the bid

1. After talking to the client, select **Revise bid**. The tender goes back to Estimating.
2. Change the lines, then submit the next version with its reason.

Compare versions

1. Under **Compare versions** choose **From** and **To**, then select **Compare**.
2. The result shows the total, the change in amount and percent, and the lines added, removed and changed.

Send documents to the client

Under **Documents we send**:

1. **Download priced BOQ** writes your rate and amount into the client's own Excel and keeps their layout. If some lines have no rate, you are asked to confirm.
2. **Export answer sheet** gives a plain Excel list of the lines with your rates, for copying into a portal form. Nothing is sent anywhere.
3. **Make a Standard Quote from this version** takes the version you pick (the latest by default). The quote keeps the client's item numbers and links back to the tender.

Record the outcome

1. After Submitted, the main button reads **Record the outcome**.
2. Choose **Won**, **Lost** or **Dropped**. For Lost, choose the reason and who won. For Won, you can select **Create contract project now**.
3. On the Overview the **Outcome** block holds the **Awarded value** (or **Winning price**), **Won by**, **Why we lost**, **Award date** and a **Note**. Select **Save outcome**. It compares our last total with the awarded price.

Statuses

A bid version has a number and a reason. It has no status. The tender stage moves Estimating, Submitted, then Awarded, Lost or No-bid (section 2).

Links to other records

- **Standard Quotes** made from a version (listed under Documents we send, newest first).
- **Contract project**, created from the winning version.
- **Competitors** (section 6): the winner is picked from this list.

Good to know

- A saved version is never edited or deleted. Cost and markup are not in a version. A private cost record is kept with it, so the contract project can start from the bid that won.
- A bid can be submitted only from Estimating or Clarifications. Revise is offered from Submitted or Clarifications.
- Client item numbers show as an **Item** column on the Standard Quote lines and on its PDF.

- A lost tender needs the reason. The winner you pick is also saved as the deal's competitor.
- Accepting a Standard Quote that was made from a bid may also close the tender as Won, using the standard stage list instead of the tender stages.
- A bid with no BOQ file can still be submitted from hand-made lines.



FIGURE 24 The tiles, the Before you submit warning and the Submit bid button.

6. Room, calls and competitors

What it is

Three small tools that sit around the bid. The **Room** is the team's private place to discuss the bid. **Calls and visits** records contact with the client. **Competitors** lists who else is bidding.

Where to find it

Sales > Pipeline, open a tender: tab **Room** (`/pipeline/<id>?tab=room` , and `/pipeline/<id>/room` as a page of its own), tab **Competitors**, and **More > History** for calls.

Who uses it and which module switches it on

The bid team. Module: **Pipeline** plus **GCC tender deals**. The Room also needs **Deal Room**. Business role entry: **Pipeline**.

How to use it

Use the Room

1. Write a message and select **Send**. Type `@` or use the **Mention** list to mention a colleague.
2. Select **Attach** to add files: PDF, Office, DXF, CSV, text or pictures, up to 5 per message and 15 MB each.
3. To ask a question, tick **Question** before sending, then choose an **Owner** and a **Due** date. It stays an open question until someone selects **Mark answered**. You can **Reopen** it.
4. **Reply** answers a message. **Remove** deletes your own message (an admin can remove any).
5. Use **All** and **Open questions (N)** to filter.
6. Under **Decisions**, type a line and select **Pin**. Pinned decisions show in the order they were agreed.

7. **Members** lists who follows. The owner and team are added by themselves. Use **Add** to add a colleague.
8. On a phone the tab shows the question count and **Open the room**.

Log a call

1. In the Room header select **Log a call**.
2. Choose the **Kind**: Call, Meeting, Site visit or Note. Set **When** and **With whom**.
3. Write **What was discussed** (required) and the **Outcome**.
4. Add a **Next step** and a **Due** date if there is one. Select **Save**.
5. Open **More > History** to read the calls and visits, newest first. Tick a next step as done. It counts as overdue in **Open work** until you do.

Track competitors

1. Open the **Competitors** tab and select **+ Add competitor**.
2. Fill in **Company** (required), **Website**, **Country**, **Expected price** (Below us, Similar or Above us), **Strengths** and **Note**. Select **Save**.
3. On a competitor card use **Edit**, **Mark as winner** or **Remove**. **Company insights** researches the company on the public web. **Analyse all** does it for every competitor.
4. The tiles show **Competitors**, **Expect to be cheaper** and **Winner**.

Statuses

A Room question is Open, Open and overdue, or Answered. A competitor has an expected price position and may carry "Won this tender".

Links to other records

- The tender it belongs to.
- **Outbound emails**: the Room sends a summary email to followers, at most every 15 minutes.
- The tender's **History**, which also lists the changes to the tender and its competitors.

Good to know

- Company insights uses part of your AI allowance. A saved card shows again at no cost. On a demo workspace the answer may be thin.
- The winner can be picked from the competitor list when the tender is decided. It is saved as who won.
- Expected price is your own judgement, not a recorded figure.



FIGURE 25 The team room: open questions, the discussion, decisions and files.



FIGURE 26 The three tiles and the Competitors list, ready for the first competitor.

7. Tender blocks on the Dashboard

What it is

Thirteen blocks for the home screen that show the tender business at a glance: pipeline value, bids closing, win rate, what needs attention and buy-out against budget.

Where to find it

Dashboard (`/`). The blocks are part of the normal dashboard. To place them use **Adapt dashboard** (see Chapter 6, section 1).

Who uses it and which module switches it on

Directors and bid managers. Module: **GCC tender deals** plus **Pipeline**. The two buy-out blocks also need **Contract projects**. The attention item "Supplier reply overdue" also needs **RFQ**.

How to use it

1. Open the **Dashboard**. In a tender workspace the tender blocks lead the default layout.
2. Use **Adapt dashboard** to add, move, resize or hide blocks. The **Tenders** bundle in Quick add brings them all.
3. The **look** switch in the toolbar has two settings: **Bold** (the light dashboard) and **Control room** (the whole page dark). Your choice is remembered for you.
4. Select a tile, a stage bar, a column, a slice or a row. It opens the Tenders tab already filtered, or the record itself.

The blocks are:

- Small tiles: **open pipeline**, **weighted by chance**, **closing in 14 days**, **win rate**, **buy-out committed**.
- Half-width blocks: **pipeline by stage**, **bids closing soonest**, **won and lost by month**, **open value by client**, **needs you today**, **open pipeline trend**.
- Full-width blocks: **bid deadlines** (a timeline of bid end dates) and **buy-out against budget**.

Needs you today lists up to five items, most urgent first: a bid decision waiting, a supplier reply overdue, a bid guarantee close to expiry, old prices on a bid, and tenders closing soon with unpriced lines.

Statuses

Colours follow the days left: red is three days or fewer, amber is ten days or fewer, green is later.

Links to other records

- The **Tenders tab** (filters: stage, closing, client, outcome, month).
- Single **tenders**, and a project's **Buy-out** tab.

Good to know

- The default look for the workspace is set in **Settings > Appearance > Dashboard** (Chapter 1, section 11.1). A person's own choice wins.
- The open pipeline trend is rebuilt from created and closed dates. Later edits to an amount are not replayed.
- A block shows only when the modules it reads are on. Business roles hide or show blocks like any other dashboard block.

8. Estimates

What it is

An estimate works out a price from a template. You pick the kind of work, enter the inputs (sizes, materials, quantities) and the price updates as you type. The estimate also gives a bill of materials, a cost build-up and a work breakdown. For some templates (precast, fences, floors, cabins) it draws a 3D model from the same pieces the price is added up from.

Where to find it

Sales > Estimates (`/estimates`). New: **+ New Estimate** (`/estimates/new`). An estimate opens at `/estimates/<id>` . The templates themselves are in **Settings > Sales > Estimate templates** (Chapter 1,

section 5.7).

Who uses it and which module switches it on

Estimators and sales engineers. Module: **Project Estimator**. Business role entry: **Estimates**. Turning an estimate into a quote also needs **Standard Quotes**.

How to use it

Start an estimate

1. Select **+ New Estimate**. The page asks "What are you estimating?" and shows the templates as cards.
2. Choose a template. You can paste the customer's email on the next page; the page reads it for you.
3. If you have no template yet, the page offers a starter (for example a chain-link fence) to begin from.
4. Enter the **inputs**. The price panel follows them.
5. Choose the **Account** and **Contact**, and a **Margin**. Select **Save as draft**.

Turn it into a quote

1. Select **Create quote**. A Standard Quote is made from the estimate (section 11).
2. The button then reads **Open quote** . If your role cannot create quotes, or Standard Quotes is off, the page says why.

Work the record

The estimate page is one long page with folds you open and close.

1. **Price built up** shows how the price is added up. For a template with a build schedule, a **schedule** fold shows the risk.
2. **Bill of materials** is for your team and the factory. A warning shows if you have unsaved changes.
3. **Send to your ERP** has the downloads. Choose the **ERP layout** and **Lines to include**, then take the **Bill of materials** or the **Work breakdown** as Excel or CSV.
4. **Details** holds the status, notes and custom fields.
5. The **More** menu has **Duplicate**, **Download bill of materials**, **Download work breakdown** and **Delete**. A deleted estimate can be undone for a few seconds. The quote made from it is kept.

Use an estimate inside a tender

1. From the Costing tab, **New estimate** starts one kept on the tender (section 4).
2. A strip at the top of such an estimate says which tender it is for. It shows the BOQ lines linked, the lines priced, the ones that need a re-price and the costs missing.
3. **Price the line from this estimate** and **Re-price** write the estimate's cost onto the BOQ row. **Raise RFQ for missing costs** asks suppliers about lines with no cost.

Statuses

Status	Meaning
Draft	Being worked on
Quoted	A quote was made from it

Status	Meaning
Won	Marked won on the Details fold
Lost	Marked lost on the Details fold

The list has a chip for each status with a count.

Links to other records

- **Account** and **Contact**.
- The **Standard Quote** made from it.
- The **tender** it prices, and the **BOQ rows** it is linked to.
- The **Inbox email** it was started from, when it came from one.
- **Products**: lines of the bill of materials that name a product.

Good to know

- The cost the bill of quantities takes from a tender estimate includes the overhead line and leaves out margin and VAT.
- Editing a template never re-prices an estimate already made. The estimate says when its template is out of date.
- "Send to your ERP" is a download at this snapshot. The page says sending straight into an ERP comes later.
- A saved estimate that has been quoted is locked in part (verify which fields).
- Estimates can be imported, exported and updated in Data Workbench (header records). The v1 API has a read-only estimates endpoint without cost fields.

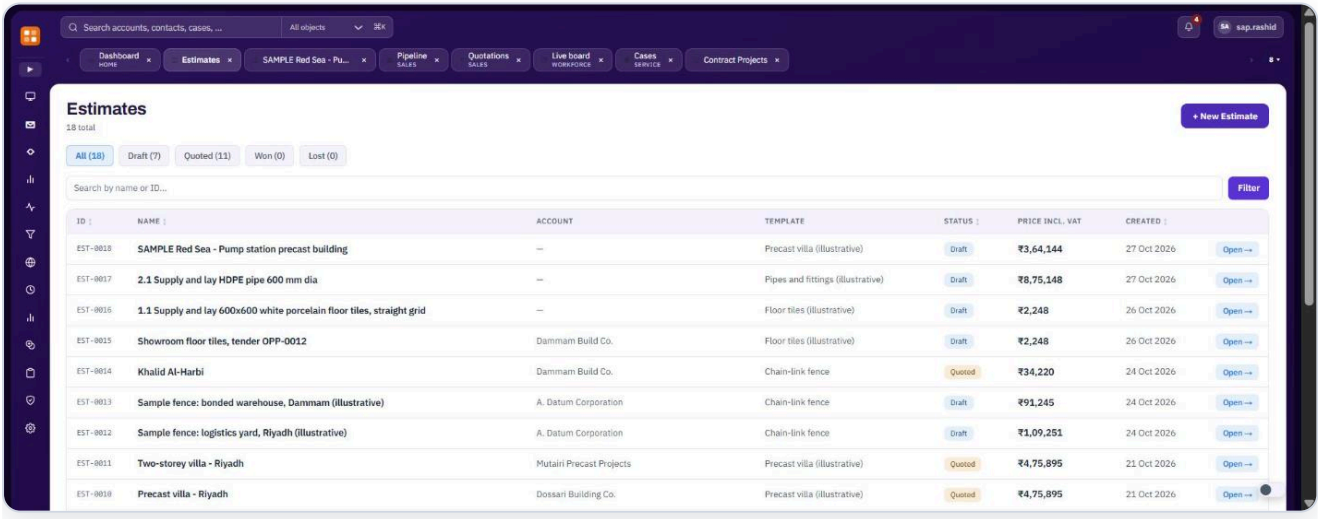


FIGURE 27 The status chips and the estimate list.

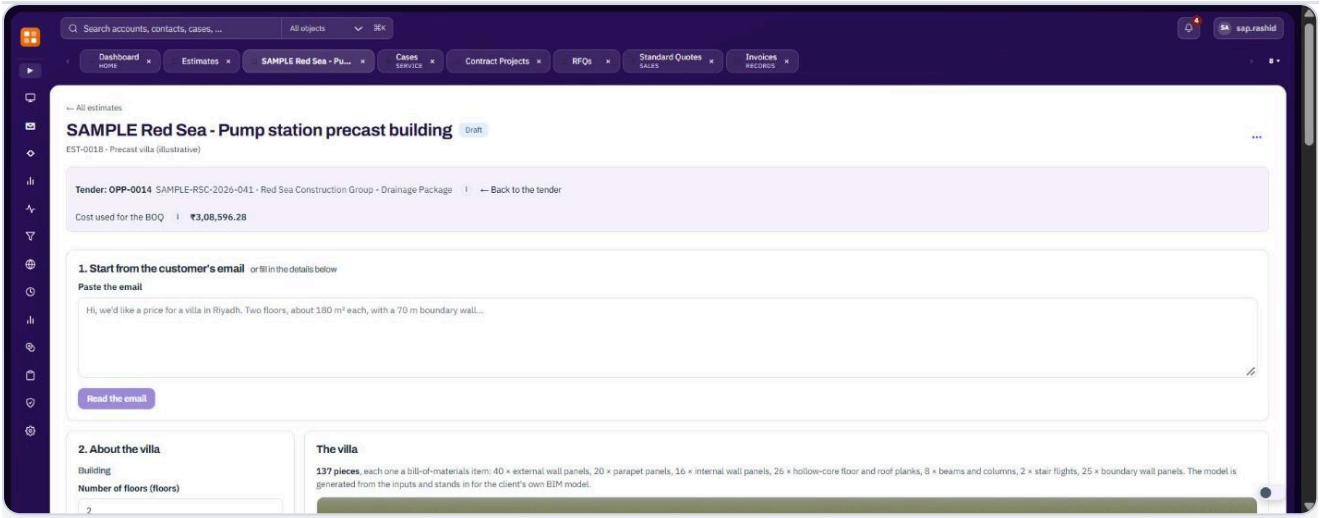


FIGURE 28 The inputs, the price panel and the Create quote button.

9. RFQs and supplier quotes

What it is

An RFQ (request for quotation) asks suppliers for a price on items you cannot price yet. Each supplier gets their own email, link and reply sheet. You compare the answers and award a line, or a whole request, to one supplier. The awarded price becomes a cost you can use in a quote or a tender.

Where to find it

Sales > RFQs (`/rfqs`). New: **+ New RFQ** (`/rfqs/new`). An RFQ opens at `/rfqs/<id>` . Suppliers answer on a page that needs no login.

Who uses it and which module switches it on

Buyers, estimators and sales staff. Module: **RFQ (supplier quotations)**. Business role entry: **RFQs**. Suppliers are in Chapter 6, section 9.

How to use it

Raise an RFQ

1. From **RFQs** select **+ New RFQ**. Or use **Request quotation** from a place where a price is missing: the lines of a deal, a Standard Quote or a Quotation (there is also one for a single line), a case, a work order, or the Costing tab of a tender.
2. Enter a **Title** (it is taken from the first line if left blank). Add lines: a product or free text, a specification, a quantity and a unit.
3. Choose the **Suppliers**. The form suggests past winners.
4. Set **Reply by**, **Needed by**, **Delivery terms**, **Note to suppliers** and an **Internal note**. The internal note is never sent.
5. Select **Save as draft**, or **Send to N suppliers**.

Collect the answers

1. Each supplier gets an email with a personal reply link. An RFQ PDF and an Excel reply sheet can be attached, depending on the setting.
2. The supplier opens the link and gives a price and a lead time per line. They can offer an alternative, decline or ask a question. They can answer again until the deadline.
3. On the **Suppliers** tab, each supplier shows a state. Use **Enter reply** to key in a reply, **Upload reply sheet**, **Copy reply link**, **New link**, **Change email** or **Remove**. **Read prices** uses AI to read a reply sheet. Nothing is saved until you confirm.
4. The **Conversation** tab holds every message. Choose **Email supplier** or **Internal note**.
5. **More > Remind N** chases suppliers who have not replied.

Compare and award

1. Open **Compare & award**. The lowest valid price is marked.
2. Select **Award** on a price, or **Award all** under a supplier. Foreign currency asks for the exchange rate. A price that is not the lowest asks for a reason.
3. The award stores a confirmed cost for a catalog product, so the next Price uses it.
4. If the RFQ belongs to a tender, the page says to award it on the tender's Costing tab instead.

Turn awards into purchase orders

1. With **Inventory & Purchasing** on, a **Purchase orders** block appears under the comparison once lines are awarded.
2. Select **Create purchase orders**. One draft PO is made per awarded supplier at the awarded cost.
3. Check and mark them in **Purchase Orders** (section 13).

Statuses

Status	Meaning
Draft	Not sent
Sent	Sent, no reply yet
Partly replied	Some suppliers have replied
All replied	Every supplier has replied
Awarded	Lines are awarded
Closed	Finished
Cancelled	Stopped

A supplier on an RFQ is Not sent, Sent, Opened, Replied, Declined, Expired or Removed. A line is open, awarded, no award or cancelled.

The list chips are **Open**, **Waiting on suppliers**, **Ready to award**, **Awarded**, **From a quote** and **All**.

Links to other records

- The **record it was raised from** (the "From" line and the Quote column): a Standard Quote, Quotation, Deal, Case, Work order, Estimate or Tender.

- **Suppliers** and **Products**.
- **Purchase Orders** made from the awards.
- A tender's **BOQ rows**.

Good to know

- The header **More** menu has **Edit**, **Print / PDF**, **Remind N**, **Close**, **Reopen**, **Cancel RFQ** and **Delete** (a draft only).
- The RFQ PDF and the supplier page carry no customer name and never show another supplier's price.
- The mail channel (your own mailbox, or BPMSquare), days to reply, reminders, link life and terms are set in **Settings > Sales > RFQ** (Chapter 1, section 5.6). With the BPMSquare channel, supplier replies by email are filed by their reply address.
- A supplier with no email address cannot be sent a request.
- The reference is `RFQ-<number>` .
- RFQs can be exported and updated in Data Workbench but not imported. The v1 API and the MCP server have read-only RFQ endpoints.
- Several approved suppliers per product, and supplier performance reports, are not built.

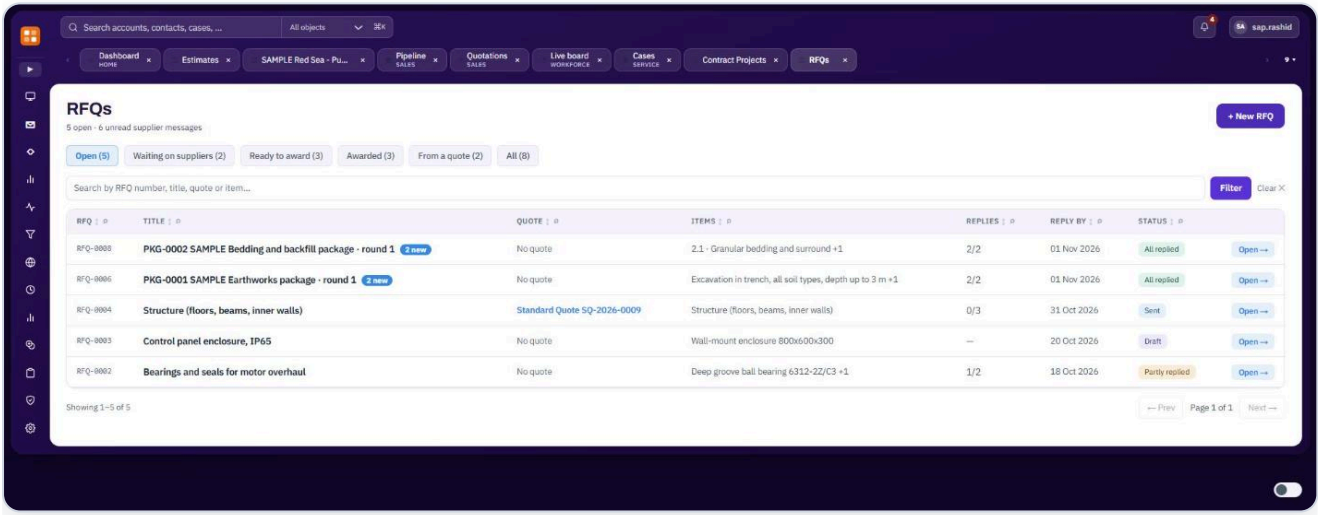


FIGURE 29 The chips, the Replies column and the status pills.

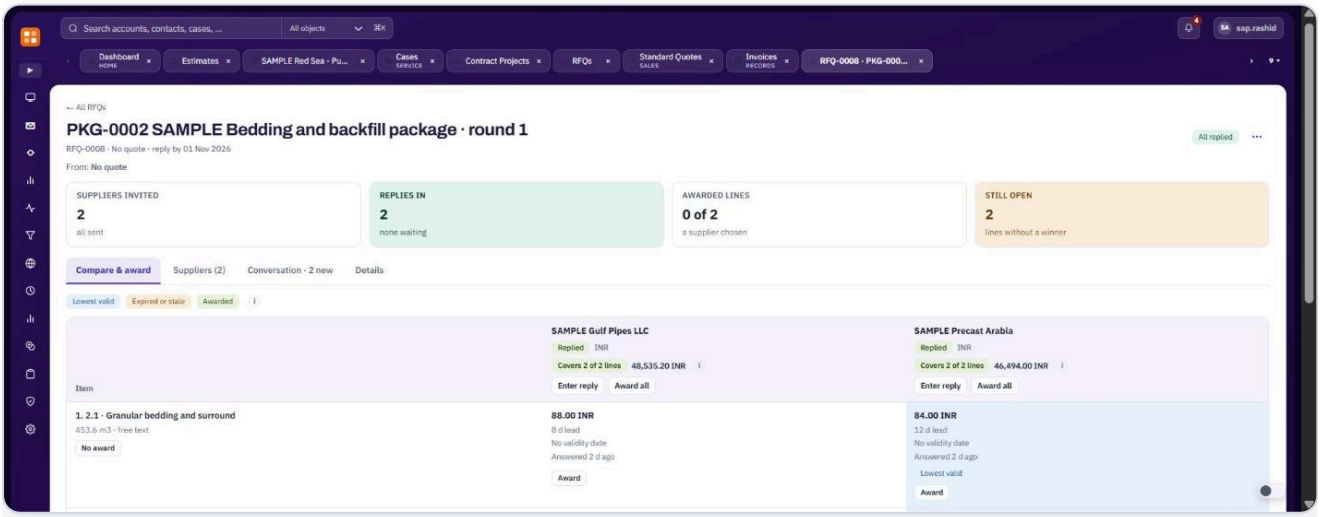


FIGURE 30 Compare & award with two suppliers and the Purchase orders block.

10. Quotations

What it is

A quotation is a priced offer to a customer, with a scope of work, line items, terms and a PO value check. It is the original quote object of the product and it carries versions, an outcome (won or lost), and links to assets and cases.

Where to find it

Sales > Quotations (`/quotations`). New: **+ Create quote** (`/quotations/new`). A quotation opens at `/quotations/<id>` . Edit: `/quotations/<id>/edit` .

Who uses it and which module switches it on

Sales staff and service coordinators. Module: **Quotations**. Business role entry: **Quotations**. A quotation can also start from a service case (Chapter 3, section 7).

How to use it

Create a quotation

1. Select **+ Create quote**. Choose the offer type: **Quotation**, **Technical Offer** (scope and quantities, no prices), **Budgetary Offer** or **Supply Quotation** (with HSN codes and tax per line). **AMC Contract** and **Installation** show as "Coming soon". Your administrator can hide types in **Settings > Sales > Quotations** (Chapter 1, section 5.1).
2. Under **Account & Contact** choose the customer.
3. Under **Quote details** set the **Quote name**, **Valid until**, **Inquiry date**, **Ref no.**, **Customer PR no.**, **Customer PO no.** and the **Issuing entity**. The **Quote ID** is made for you.
4. Write the **Scope of work**. Link the customer's **assets** if the work is on equipment.
5. Add the lines under **Particulars**. **Price with engine** suggests a rate from the pricing engine and you can still edit it. **Price all lines** does it for every line that names a product.
6. Add **Terms & Conditions**. The Summary shows subtotal, discount, tax and deductions (salvage credited back). The **Customer PO** block compares the PO value with the quote.
7. Select **Save as draft**.

Send and track it

1. Open the quotation. The header has a **status** drop-down and an **outcome** drop-down (Open, Won, Lost, Dropped).
2. **More > Email quote** opens a compose window. **More > WhatsApp** opens WhatsApp with a link to the PDF. **More > Download PDF** and **Download CSV** take it away.
3. Set the status to the stage it is at (default: Draft, Sent, Approved, Rejected).
4. When the customer agrees, set the outcome to **Won**. The page may offer to move the status to the approved one too.
5. For **Lost** or **Dropped** the page asks why, with a reason list and an optional note.

Change a quotation

1. **Edit quote** opens the form. It is offered until the quotation reaches a closed status.
2. **Create new version** makes an editable copy. This version becomes read-only and points to the newer one. The **Versions** tab lists every version.
3. **More > Copy quote** makes a new draft from it. **More > Create standard quote** makes a Standard Quote from it (needs Standard Quotes).
4. **More > Adapt layout** lets an administrator reorder sections and add custom fields on the page.

After a win

1. With the outcome Won and Invoices on, select **Convert to Invoice**. The button then reads **View invoice**.
2. With Sales Orders on, a strip shows **Create sales order**, or the order already made.

Find quotations

1. The list opens with tiles: Total quotes, Overall value, Won value, In pipeline and Overdue. Others can be added: Lost value, Awaiting approval, From cases, Standalone.
2. Filter by status, search the account, use **Advanced filters**, or search by column.
3. Tick rows to see **Copy quote** (one row) and **Delete**.

Statuses

Quotation status is a workspace list. The default is below. Outcome is separate and fixed.

Status	Meaning
Draft	Being written. The starting status
Sent	Sent to the customer
Approved	Closed
Rejected	Closed

Outcome	Meaning
Open	No result yet
Won	The customer accepted
Lost	The customer chose otherwise
Dropped	Went cold, no decision

Links to other records

- **Account**, **Contact** and **Assets** (Chapter 6).
- **Service case** and **Work orders**, when it came from a case.
- **Invoice** and **Sales order**.
- **Standard Quote** made from it, and **RFQs** raised from its lines.
- Earlier **versions**.

Good to know

- The reference follows the workspace's quote ID format (default `QT-<year>-<number>`). It is set in **Settings > Company > Numbering** (Chapter 1).
- A closed status locks the quotation and asks for an outcome.
- The tile named **Awaiting approval** counts quotations in a status that is neither the starting status nor a closed one. There is no separate approval step.
- A line below the margin floor can block sending until it is re-priced (Chapter 6, section 14).
- **Convert to Invoice** works on a Won quotation, once, and only on its latest version.
- "WhatsApp (embedded)" shows as "Coming soon".
- Quotations can be imported, exported and updated in Data Workbench. The v1 API and the MCP server list quotations.
- Custom fields can be added in **Settings > Data > Custom fields**.

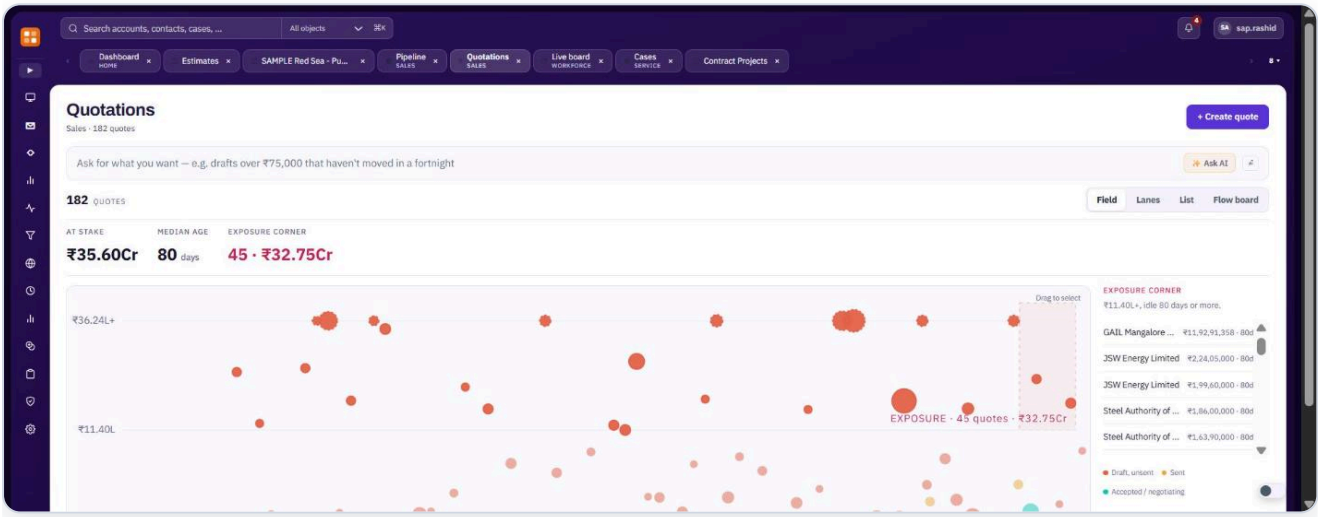


FIGURE 31 The tiles, the status filter and the list.

11. Standard Quotes and templates

What it is

A Standard Quote is a plain quote for an account: line items, a discount, tax and shipping. It is the quote that deals, tenders and estimates produce. It has its own PDF layouts, called templates. Alternatives and quantity breaks can sit on its lines.

Where to find it

Sales > Standard Quotes (`/standard-quotes`). New: **+ New Standard Quote** (`/standard-quotes/new`). A quote opens at `/standard-quotes/<id>` . Templates: **More > Manage Templates** on the list (`/standard-quotes/templates` , administrators only).

Who uses it and which module switches it on

Sales staff. Module: **Standard Quotes**. Business role entry: **Standard Quotes**. Pricing help on lines also needs **Pricing Engine** and its quote option.

How to use it

Create a quote

1. Select **+ New Standard Quote**. The form has three steps: **Details**, **Lines** and **Files**.
2. On **Details** choose the **Account** (required) and **Contact**. Set the **Inquiry date**, **Valid until** and the **Template** (the default template is used if you leave it).
3. Write **Notes** and **Terms**. The **Intro text** overrides the template's intro block. **Generate with AI** writes a cover note.
4. Select **Next: line items**. On **Lines**, add lines from **Catalog**, **Previous quotes** or **Free text**. **Draft with AI** writes lines from a description.
5. On a product line you can add **quantity breaks** and **alternatives**. Only the chosen quantity and the chosen option count in the total.
6. Set **Discount %**, **Tax %** and **Shipping / Handling**. The total shows at the top.
7. Select **Create quote**. The reference is `SQ-<year>-<number>` .

Price the lines

1. With the pricing engine on, **Price with engine** on a line and **Price all** on the editor suggest rates. The price trace shows how.
2. A line below the margin floor is flagged. If the policy is "block", the quote cannot be sent until it is re-priced or approved.
3. **Request quotation** on a line (or at the top for all lines without a cost) asks suppliers for a price (section 9).

Add files and lines from a file

1. Open the **Files** step, or **Related > Attachments** on a saved quote. Upload the customer's file (up to 15 MB).
2. For an .xlsx or .csv file, select **Create line items**. A preview shows the rows. Choose **Add N lines**, **Append all**, **Append, skip duplicates** or **Replace the existing**.

Send and close it

1. On a draft the main button is **Email to customer**. It sends the PDF at once to the contact's email, or the account's email if the contact has none.
2. The email does not change the status. To move the quote on, choose **More > Mark as sent**.
3. On a Sent quote the main button is **Mark accepted**. **More > Mark rejected** closes it the other way. **Resend email** sends again.
4. On an Accepted quote, **Create invoice** appears with Invoices on, and **Create sales order** with Sales Orders on.
5. **More > Print / PDF** gives the PDF. **Edit** and **Delete** are for drafts only.

Link it to a deal

1. In the right-hand column, **Create deal from this quote** starts a deal, or **Link to a deal** picks an open one (Pipeline must be on).
2. **Unlink** takes it off again.

Design the PDF (administrators)

1. Open **Manage Templates**. Type a name and select **+ Create & open builder**.

2. In the builder, **Design with AI** sets colours and blocks from a style description. Check the result before saving.
3. Under **Template settings** set the **Name**, the **Accent color**, the **Logo position** and **Default template for new quotes**.
4. Under **Layout blocks** switch blocks on or off and set their order and text: letterhead, quote number and date, quote for, intro text, line items table, total, notes, terms, signature block, footer text, specifications table and call-to-action banner. Required blocks stay on.
5. Select **Save**. The list shows which template is the default. **Set as default** and **Delete** are on the list. A quote whose template is deleted falls back to the default layout.

Statuses

Status	How it is set
Draft	New quote
Sent	**Mark as sent**
Accepted	**Mark accepted**
Rejected	**Mark rejected**
Expired	No button or timer in the app. Import or the API only

The list has a tile for each of Draft, Sent, Accepted and Rejected with a count and a value. Select a tile to filter.

Links to other records

- **Account** and **Contact**.
- The **Deal** it belongs to.
- The **Invoice** made from it, and the **Sales order**.
- **RFQs** raised from its lines.
- A **tender bid version** or an **estimate**, when it came from one.
- The **Inbox email** it started from (right-hand column).

Good to know

- Pricing choice. The internal or external pricing choice is not on the quote. It lives on the order type (section 12). On a quote, price comes from the lines, the pricing engine and your price lists.
- A quote made from a tender bid keeps the client's item numbers in an **Item** column on the Lines tab and on the PDF, in the client's order.
- An accepted quote can be billed once. The invoice link replaces the button.
- Only drafts can be edited or deleted. To change a sent quote, copy it into a new one.
- Accepting the quote closes its deal as Won, if the deal is still open.
- If the Integration middleware is on, the accepted or rejected quote can also go to your ERP (see Chapter 1, section 10.2).
- Custom fields can be added in **Settings > Data > Custom fields**. Standard Quotes and their lines can be imported, exported and updated in Data Workbench. The v1 API and the MCP server list and read them.

- Quotation templates for text and email are in Settings (Chapter 1, section 5.1). The PDF templates here are separate.

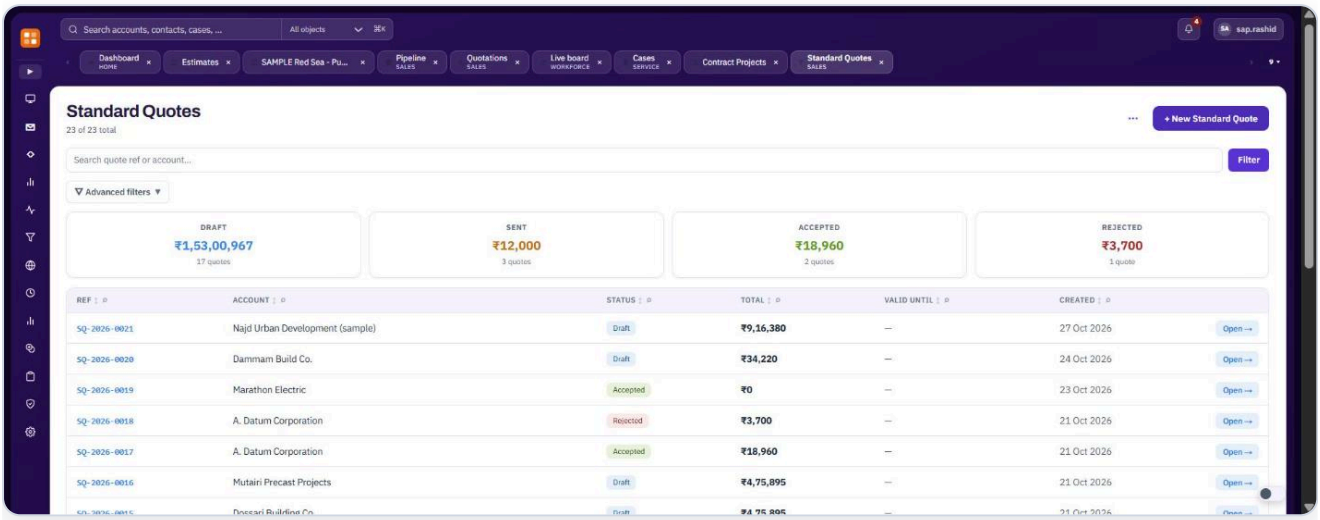


FIGURE 32 The four status tiles and the list.

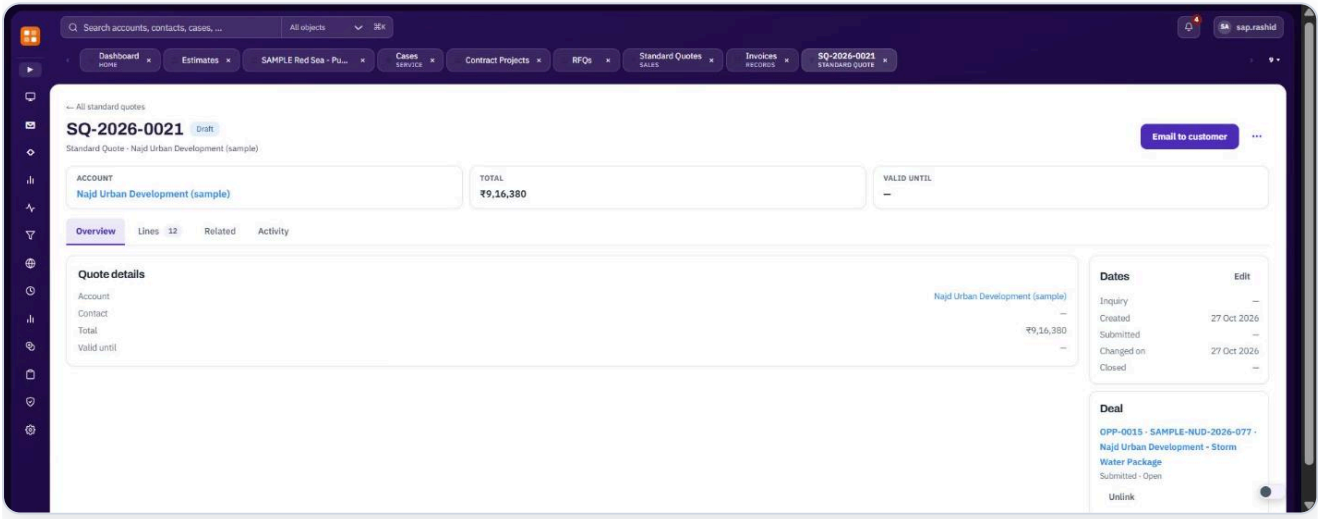


FIGURE 33 The header actions, the Lines tab and the deal card.

12. Sales Orders and order types

What it is

A sales order records what a customer bought. It is made from an accepted quote, or typed in directly. It follows a path across the top of the page: Draft, Confirmed, Delivered, Invoiced, Paid. The last three fill in when your ERP reports them. An order type decides the order numbers, how the lines are priced and how the PDF looks.

Where to find it

Sales > Sales Orders (`/sales-orders`). New: **+ New Sales Order** (`/sales-orders/new`). An order opens at `/sales-orders/<id>` . Order types: **More > Order types** on the list, or **Settings > Sales > Order types** (Chapter 1, section 5.2).

Who uses it and which module switches it on

Sales administrators and order desks. Module: **Sales Orders**. Business role entry: **Sales Orders**. The module needs a database update that your administrator applies by hand. Without it the page says so.

How to use it

Create an order

1. From an accepted Standard Quote select **Create sales order**. From a won Quotation use the strip at the top of the quotation. The lines, prices, discount, tax, contact, customer PO and notes are copied. One tap.
2. Or select **+ New Sales Order**. Choose the **Customer** (required) and **Contact**. **Order type** starts as "Automatic": your rules pick the type, else the default type applies.
3. Enter the **Customer PO** and the **Requested date**. Under **More** set **Ship to**, **Ship-to address** and **Notes**.
4. Add the lines. Select **Create order**.
5. If an order already exists for the quote, the page tells you the number and asks you to confirm before making another.

Work an order

1. The tabs are **Overview**, **Lines**, **Availability**, **ERP**, **Documents and files** and **History**.
2. On **Overview** read the customer, bill-to and ship-to, the total with tax, the expected delivery and the customer PO.
3. On **Lines** edit quantity, unit price, discount, tax and a **Printed text** per line. Only a draft can be edited.
4. **Availability** shows what was asked against what is confirmed. The source is the ERP or master data (stock and lead time, labelled an estimate). **Refresh availability** reads it again.
5. Select **Confirm order**. It needs at least one line. A confirmed order is locked. **More > Reopen** makes it a draft again.
6. **PDF**, **Email** and **WhatsApp** are in the header. The WhatsApp button opens WhatsApp with the message ready. You press send.
7. **More > Edit details** changes the header. After confirming, only the notes, the customer PO and files stay open.
8. **More > Cancel order** asks for a reason. **More > Delete** works on a draft only.

With an ERP connected

1. **Check with ERP** reads the customer's credit and each product's price and stock. Nothing is saved in the ERP. The result is Passed, Warning or Failed for credit, price and stock.
2. **Send to ERP** creates the order in the ERP. It lists any check that did not pass first and asks you to confirm. After the ERP accepts it, the order is read-only here.
3. The **ERP** tab shows the transfer log, the deliveries and invoices read from the ERP, and **Refresh**.
4. An order that comes from the ERP is read-only here and is marked ERP in the list.

Statuses

Status	Meaning
Draft	Open for editing

Status	Meaning
Confirmed	Locked. Lines cannot change
Cancelled	Closed, with a reason

An order from the ERP shows the ERP's own status words. The path adds Delivered, Invoiced and Paid once the ERP reports them. A line shows "short" or "late" when the confirmed quantity or date falls behind.

Links to other records

- **Account** and **Contact**.
- The **source**: Standard Quote, Quotation, Deal or an earlier order. The Documents tab draws a flow: source, order, deliveries, invoices.
- **Files and links** on the order: Customer PO, Drawing or Other.
- The ERP's order number, shown read-only.

Good to know

- Pricing mode is a company decision per order type, not a switch on the order. **Internal** prices lines from your price list and pricing engine. **External** takes prices from the ERP and keeps them read-only. A quiet line under the header says which one applies and where the prices came from.
- An order made from a quote uses that quote's prices. There is no internal or external toggle on the quote or the order.
- Order numbers are `<prefix>-<number>` , counted per prefix. The prefix belongs to the order type.
- Order types can be switched off but not deleted once they have orders.
- The list has chips for Draft, Confirmed and Cancelled. If an ERP has put orders in, it adds BPMSquare and ERP chips and an ERP no. column.
- A deal can be the source of an order through the API, but the deal page has no button for it. Neither does the Inbox.
- Sales orders can be imported, exported and updated in Data Workbench, and read through the v1 API and the MCP server.

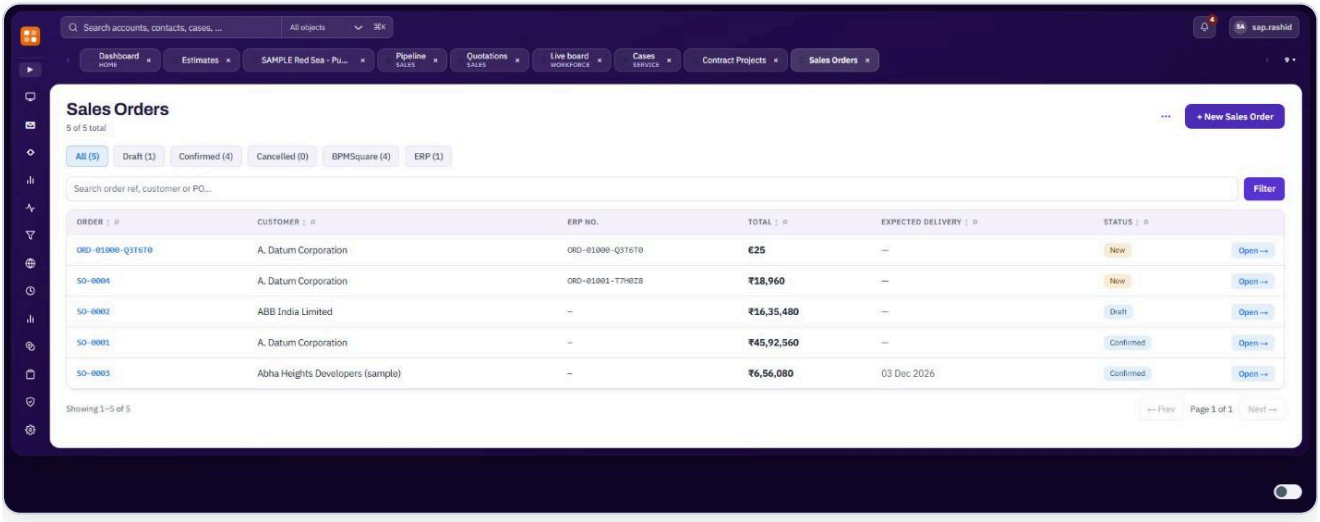


FIGURE 34 The status chips and the list.

13. Purchase Orders

What it is

A purchase order (PO) orders stock or goods from a supplier. You record what arrives against it, and stock levels go up.

Where to find it

Sales > Purchase Orders (`/purchase-orders`). New: **+ New Purchase Order** (`/purchase-orders/new`). A PO opens at `/purchase-orders/<id>` .

Who uses it and which module switches it on

Buyers and store keepers. Module: **Inventory & Purchasing**. Business role entry: **Purchase Orders**.

How to use it

Create a PO

1. Select **+ New Purchase Order**.
2. Choose the **Supplier** (required). Set the **Order date** and **Expected delivery date**.
3. Optionally link a **quote** and a **case**.
4. Add lines with **+ Add line**. For each line pick an item **From inventory** (it fills in the rest) or type a **Description**. Set the unit, the quantity and the rate.
5. Add **Notes** and **Terms**. Select save. The reference is `PO-<year>-<number>` .

Send and receive

1. Open the PO. On a draft the main button is **Mark as sent**. It changes the status only. Nothing is emailed.
2. When goods arrive, select **Receive stock**. The Lines tab shows a **Receive stock** card.
3. Type the quantity received on each line. Select **Record receipt**. A line cannot receive more than is outstanding.
4. Lines tied to an inventory item add the quantity to stock on hand.

Cancel

1. **More > Cancel order** is offered once the PO is sent. It asks for confirmation. The PO stays on record as cancelled.

Create POs from an RFQ

1. On an awarded RFQ, select **Create purchase orders** (section 9). One draft PO is made per supplier.

Statuses

Status	How it is set
Draft	New PO
Sent	Mark as sent
Partially received	Some quantity received

Status	How it is set
Received	Every line fully received
Cancelled	Cancel order

The list has a chip for each status with a count.

Links to other records

- **Supplier** (Chapter 6, section 9).
- **Quotation** and **Service case**, when linked.
- **Inventory items** on the lines (Chapter 6, section 11).
- The **RFQ** whose award made it.

Good to know

- A PO has no PDF, email or WhatsApp button at this snapshot. The RFQ screen says "check and send from Purchase Orders", but this page can only mark it sent.
- Status is worked out from the quantities received. You cannot set Received by hand.
- Only a draft can be deleted.
- Purchase orders can be imported, exported and updated in Data Workbench. The v1 API and the MCP server list and read them.
- Purchase orders from a contract buy-out are raised in your purchasing system, not here (section 15).

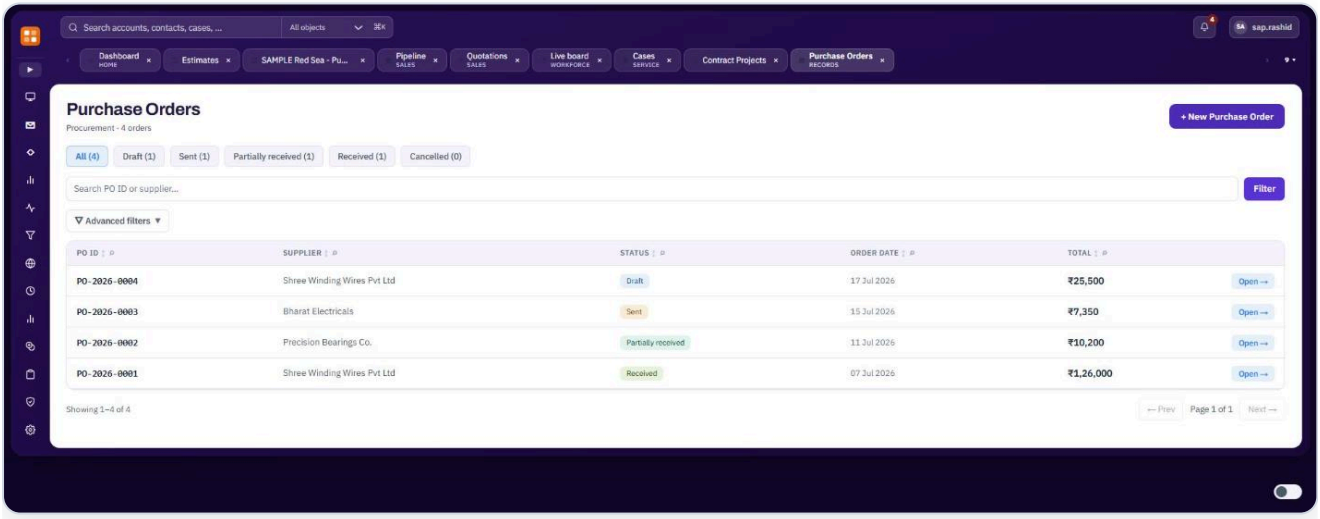


FIGURE 35 The status chips and the list.

14. Contract projects

What it is

A contract project is what a won tender becomes. It holds the contract value, a cost budget split by resource type and cost code, numbered budget revisions, client changes (variations), the billing schedule and an Excel handover for your purchasing system. A project can also be made by hand.

Where to find it

Sales > Contract Projects (`/contract-projects`). New by hand: **+ New Contract Project** (`/contract-projects/new`). A project opens at `/contract-projects/<id>` . From a tender: **Create contract project** on the awarded tender. The lists the budget uses (cost codes, resource levels and so on) are in **Settings > Sales > Contract projects** (Chapter 1, section 5.4).

Who uses it and which module switches it on

Project managers, finance and the people who approve budgets. Module: **Contract projects**. The project page also needs **GCC tender deals** (see Good to know). Business role entry: **Contract Projects**. Approvers are the same people as for a bid decision (**Settings > Sales > Tenders**).

How to use it

Create it from the tender

1. Win the tender: select **Record the outcome**, choose **Won**, then **Create contract project now**. Or open an Awarded tender and select **Create contract project**.
2. The project starts with the contract value from the award (or the final bid total if no award value was recorded). The tender's lines become the baseline budget. A line with a recorded cost uses it. The rest start at the rate less your default margin and are marked "estimated".
3. If a project already exists for the tender, the button reads **Open contract project**.

Create it by hand

1. Select **+ New Contract Project**. Enter the **Name** (required), the **Customer** and the **Contract value**. Select **Save**.
2. Add the budget lines yourself.

Read the Overview

1. The tiles show **Contract value**, **Budget**, **Planned margin** and **Lines**.
2. **Budget against contract value** compares the two bars. **Budget by cost type** splits the budget by resource.
3. **Needs attention** lists lines with only an estimated cost and lines with no cost code.
4. **Details** holds the customer, manager, planned start and end, the tender and the ERP id. Managers can edit them.
5. For a tender project, **Came from** links the tender, the winning bid version, the BOQ file and the estimates. **Bid against budget** compares the cost in the winning bid with the budget now.

Build and approve the budget

1. Open the **Budget** tab. Lines are grouped by resource type. Select **+ Add line**. Fill in the description, resource, cost code, quantity, unit and unit cost. Tick **Reserve** for money held back for risk.
2. Select **Save budget**.
3. On the Overview, select **Ask for approval**. The project shows "Baseline waiting".
4. An approver selects **Approve** or **Reject** (a reason is required). The proposer can withdraw. On approval the budget is locked and the project becomes Active.

Change the budget after approval

1. Open the **Revisions** tab. Under **Start a revision** choose the **Reason** and add a note (required for the reason "Other"). Select **Start revision**.
2. Edit the new revision on the Budget tab and ask for approval again. The older one is marked Superseded.
3. **Compare** opens a revision against the approved one: lines added, removed and changed, and the change in total.

Record a client change (variation)

1. Open the **Variations** tab and select **+ Add variation**.
2. Enter a **Title**, the **Change in contract value** (a minus sign for something taken out), the **Change in cost**, the **Change request** it answers and a description.
3. Select **Send for approval**. An approver selects **Approve** or **Reject**. You cannot approve your own unless the workspace allows it.
4. Approval changes the contract value and opens a budget revision for the cost.

Bill the client

1. Open the **Invoicing** tab. Select **+ Add milestone**.
2. Enter the **Title**, **Due date** and the amount as **Percent of contract value** or **Fixed amount**. Percent milestones are worked on the contract value as it stands now. Totals over 100% warn, they do not stop you.
3. When a milestone is ready, select **Create invoice**. A draft invoice is made for that milestone and linked back. The amount is before tax, and the tax is shown under it.
4. On a phone each milestone is a card.

Hand over and close

1. The **Handover** tab gives **Download Excel**: the project, its budget lines by resource and cost code, and the material list.
2. **More > Close project** closes an Active project. **Reopen project** opens it again. **Delete** works on a Draft project whose budgets are all drafts.

Statuses

Project status	Meaning
Draft	Budget not yet sent for approval
Baseline waiting	The baseline budget waits for an approver
Active	Baseline approved
Closed	Finished

Budget revision	Meaning
Draft	Being edited
Waiting for approval	Sent to an approver
Approved	Locked
Superseded	Replaced by a later revision

Revision 0 is called the Baseline. A variation is Draft, Waiting for approval, Approved or Rejected. A milestone is Planned, Ready to invoice, Invoiced or Paid.

Links to other records

- The **tender** it came from, and its **bid version**, **BOQ** and **estimates**.
- **Customer** (account).
- **Invoices** made from milestones.
- **Buy-out packages** (section 15).
- **Settings lists**: resource levels, cost codes, justification reasons, reserve types, divisions and job locations.

Good to know

- The list opens with tiles for Active projects, Contract value, Budget and Margin below 10%. Chips filter by status.
- The Contract Projects menu item shows when only **Contract projects** is on, but the project page returns "not found" unless **GCC tender deals** is on too.
- Committed and Actual cost columns on the Budget tab are not typed in. Committed comes from buy- out awards. Actual will come from the ERP later.
- The starter lists are not your client's own. Replace them in Settings.
- The reference is `CPR-<number>` . A variation is `VAR-<number>` .
- **Send to ePROMIS** is always switched off at this snapshot. The Excel is the handover.
- The project's ERP id line is filled by an integration and cannot be edited here.

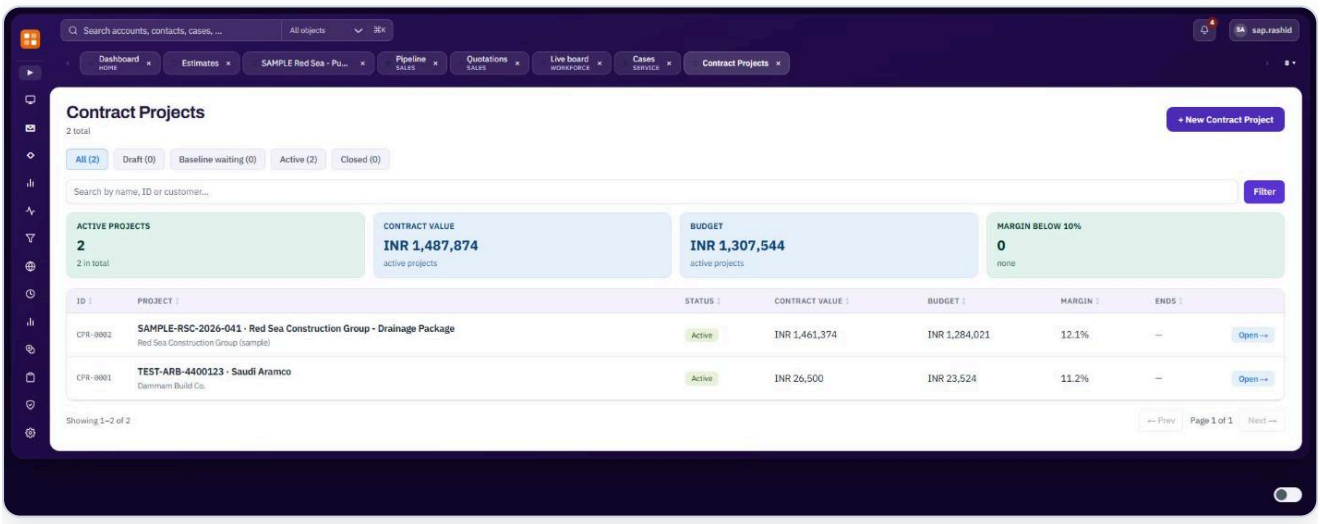


FIGURE 36 The four tiles, the status chips and the project list.

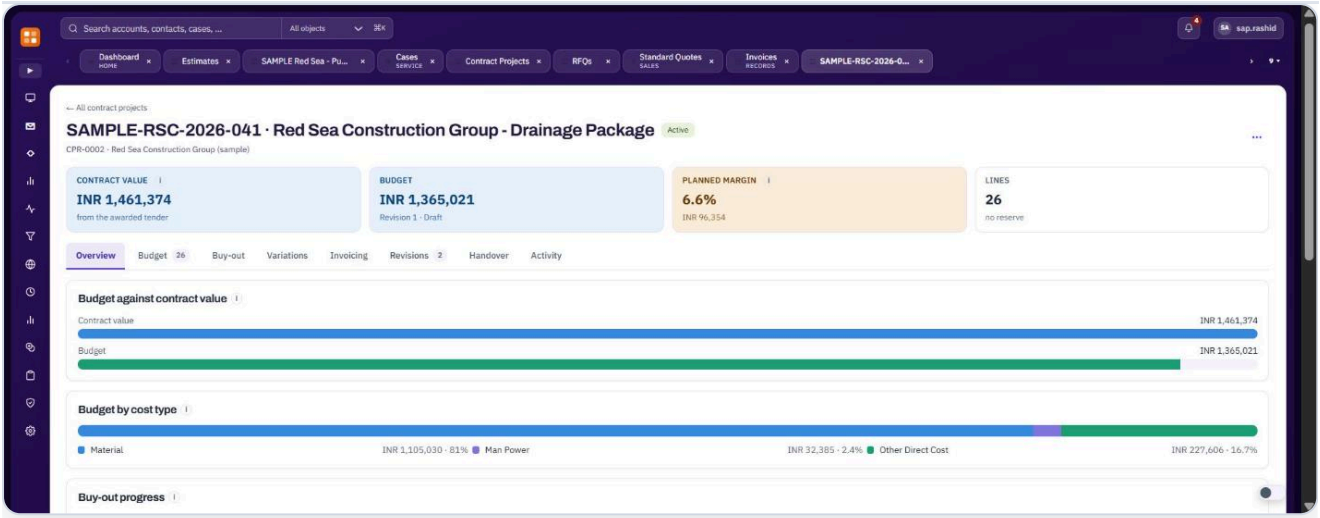


FIGURE 37 The tiles, Budget against contract value and Needs attention.

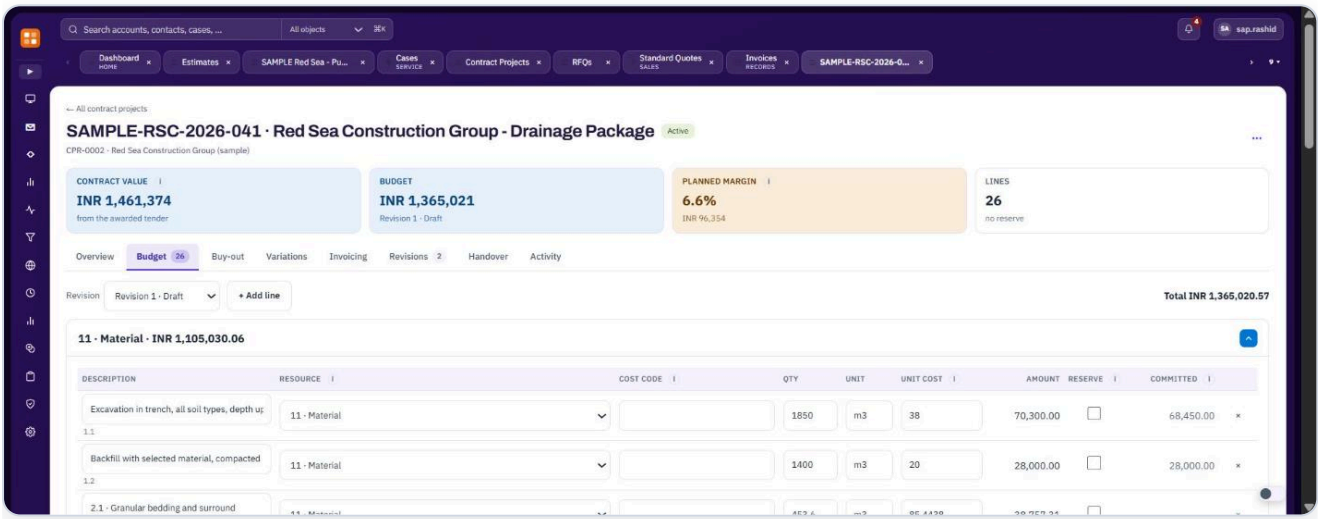


FIGURE 38 The budget grid grouped by resource type.

15. Buy-out packages

What it is

Buy-out is the step after the award. The project groups its budget lines into packages, asks the client's approved suppliers for one price per package, compares the prices, awards each package to one supplier and hands it over as an Excel. The purchase order itself is raised in ePROMIS or your ERP.

Where to find it

Sales > Contract Projects, open a project, tab **Buy-out** (`/contract-projects/<id>?tab=buyout`). The tab sits after Budget. The project **Overview** carries a **Buy-out progress** card.

Who uses it and which module switches it on

Buyers and project managers. Module: **Contract projects** plus **GCC tender deals**. The project must have been made from a tender. Business role entry: **Contract Projects**. Suppliers and the client's approved group are in Chapter 6, section 9.

How to use it

Check the set-up

1. At the top, the tab names the group in use ("Suppliers from: ") or says there is no approved list for this client.
2. If the client accepts only its own vendors, make a group for it under **Suppliers**, tab **Groups**, before sending anything. The supplier lists then show only its members, and the server refuses anyone else.

Read the tab

1. Four tiles: **Budget in packages**, **Committed**, **Best quotes vs budget** and **Needs a decision**.
2. Filter buttons: **All**, **Not sent**, **Out**, **Ready to award**, **Awarded**, **Handed over**.
3. The table shows each package with its budget, best quote, committed amount, position against budget, status and an ePROMIS state. On a phone it becomes cards.

Make a package

1. Select **+ New package**.
2. Enter a **Name** (required) and a **Kind**: Supplier (goods) or Subcontract (work). The kind is only a label for now.
3. Tick the budget lines to include. A line sits in one package at most. Lines already used are not offered. The panel shows how many lines are chosen and what they add up to.
4. Select **Create package**.

Ask for prices

1. Open the package. Select **Send request**.
2. Tick the suppliers (only the client's approved group is shown). Set **Reply by** and a **Note to suppliers**.
3. Select **Send request to N suppliers**. Each supplier gets an email with a link and answers on a page without logging in: a price and a lead time per line, with room for an alternative or a refusal.

Compare and award

1. Under **Quotes in the current round** the replies sit side by side. The lowest valid price is marked.
2. Select **Award package** on a quote. Confirm with **Confirm award**. A reason is asked for when the quote is not the lowest valid one or has expired. A package over its budget shows a warning. It is never blocked.
3. **Against the budget** draws budget, best quote and committed as bars.

Run another round

1. If the best price is not good enough, select **Send a new round**.
2. Each round is its own request and none is ever deleted. **Rounds kept for audit** lists every round with its request number, date and result.

Take back an award

1. Select **Un-award**, type the reason (required) and confirm. This is possible until the handover is marked as sent.

Hand over

1. On an awarded package, select **Download Excel**: supplier, lines, quantities, awarded rates and cost codes.

2. Optionally type the **ERP reference**. Select **Mark as sent to ePROMIS**. It records who, when and the reference, and ends the right to un-award.

Delete a package

1. **Delete package** puts its budget lines back in the list of lines without a package.

Statuses

Package status	Meaning
Not sent	No request sent
Out	Request sent. The pill can read "Out, 2 of 3 replied"
Ready to award	At least one valid reply and no award
Awarded	One supplier has the package
Handed over	Marked as sent to ePROMIS

The handover state is Not ready, Ready or Sent.

Links to other records

- The **contract project** and its **budget lines**. The Budget tab shows a **Committed** column.
- **RFQs**: each round creates one (reference `RFQ-<number>`).
- **Suppliers** and the client's **supplier group**.
- The package reference is `PKG-<number>` .

Good to know

- Packages can be made only from an approved baseline budget. Reserve lines are left out.
- Awarding is per package. One supplier takes the whole package.
- The cost shown beside each line ("Cost in bid") is internal. Nothing on these screens and nothing in the handover Excel shows the bid price or markup.
- Purchase orders are not raised here. They come from the Excel.
- The Overview card **Buy-out progress** shows packages awarded and handed over, and committed against the amount in packages.
- Whether a re-tender should reuse the bid-time suppliers is not decided (verify with your BPMSquare contact).

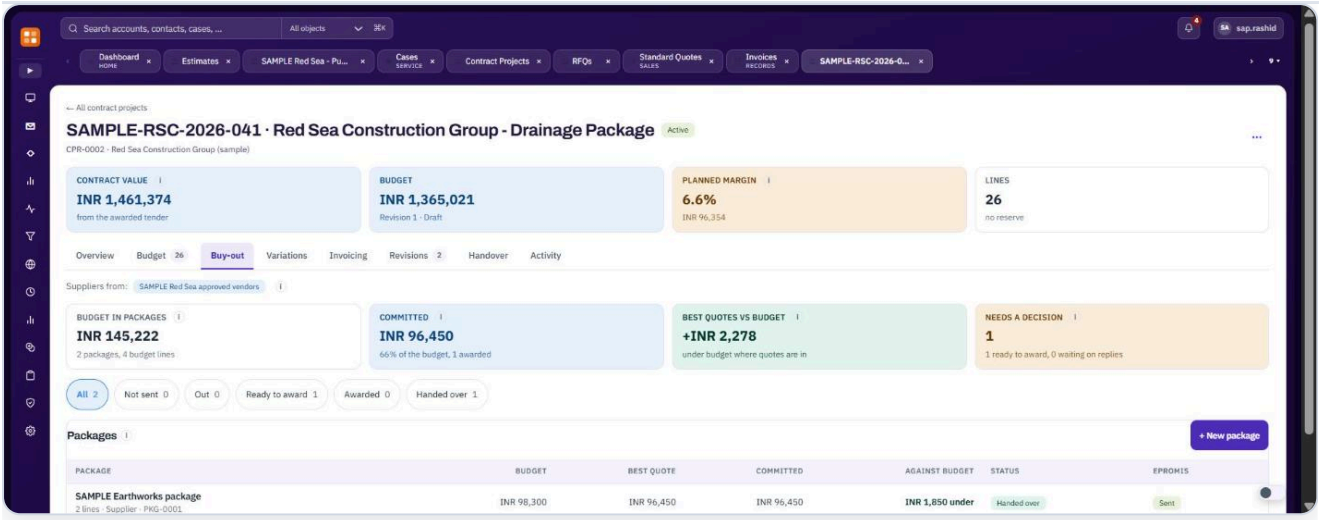


FIGURE 39 The four tiles, the filter buttons and two packages.

16. Invoices

What it is

An invoice bills an account. It holds lines, discount, tax, a due date and the payments recorded against it. It is made from a quote, a work order, a project milestone, or typed in directly.

Where to find it

Sales > Invoices (`/invoices`). New: **+ New Invoice** (`/invoices/new`). An invoice opens at `/invoices/<id>` .

Who uses it and which module switches it on

Finance and billing staff. Module: **Invoices**. Business role entry: **Invoices**. Saudi e-invoicing adds checks and a bilingual layout, and needs **Saudi e-invoicing, data readiness** (see Good to know).

How to use it

Create an invoice

1. From a Won Quotation select **Convert to Invoice**. From an Accepted Standard Quote select **Create invoice**. From a Completed work order select **Raise Invoice** (Chapter 3). From a project milestone select **Create invoice** (section 14). Each makes a draft.
2. Or select **+ New Invoice**. Pick **From approved quote** to fill everything below, or choose the **Account** (required), **Contact**, **Issuing entity** and **Due date**.
3. Add lines with **+ Add line**: description (required), unit, quantity and rate. Choose a discount type and value. Add **Notes** and **Terms**.
4. Select save. The reference is `INV-<year>-<number>` .

Send it

1. Open the draft. The main button is **Email invoice**. The **Email** tab lists recipients (add addresses by typing them), a subject and a message. The PDF is attached.

2. Sending a draft marks it **Sent** and stamps the issue date.
3. To mark it sent without emailing, use **More > Mark as sent (without emailing)**.

Record a payment

1. Once the invoice is sent, the main button is **Record payment**. Open the **Payments** tab.
2. Enter the **Amount**, the **Method** (free text, for example Bank transfer), a **Reference** and a **Note**. Select **Record payment**.
3. A payment for the full balance makes the invoice Paid. A smaller one makes it Partial.

Other actions

1. **More > Print / PDF** gives the PDF. **Edit** works on the page fields. **Adapt fields** is for administrators. **Cancel invoice** keeps the record as cancelled. **Delete** works on drafts only.
2. The right-hand column links the account, contact, quote, work order, case and contract.

Find invoices

1. The tiles show a count and value for Draft, Sent, Partial, Paid and Overdue. Select one to filter.
2. Search by reference or account, and set **Issued from** and **to** dates.

Statuses

Status	How it is set
Draft	New invoice
Sent	Email, or Mark as sent
Partial	A payment smaller than the balance
Paid	Payments reach the total
Overdue	No button in the app. The page adds an Overdue pill to a Sent or Partial invoice past its due date
Cancelled	Cancel invoice

Links to other records

- **Account** and **Contact**.
- The **Quotation**, **Standard Quote**, **Work order**, **Service case**, **Contract** or **Project milestone** it came from.
- **Payments**.
- The connected system's record, when an ERP is linked.

Good to know

- An overdue reminder event is raised daily for unpaid invoices past their due date. It does not change the status.
- You cannot record a payment on a Draft or Cancelled invoice.
- With Saudi e-invoicing on, an extra block on the Overview shows the document type (Standard, Simplified, Credit note, Debit note), the VAT category of each line (Standard rate, Zero rated, Exempt, Out of scope) and a readiness check. The pill reads "E-invoice ready" or "E-invoice not ready" and the issues link to what

to fix. A Draft that is not ready cannot be sent. A credit note can be made from a sent invoice. Nothing is sent to ZATCA at this snapshot.

- The ERP, if connected, may carry its own invoice number on the ERP id line.
- Invoices can be imported, exported and updated in Data Workbench. The v1 API and the MCP server list and read them.

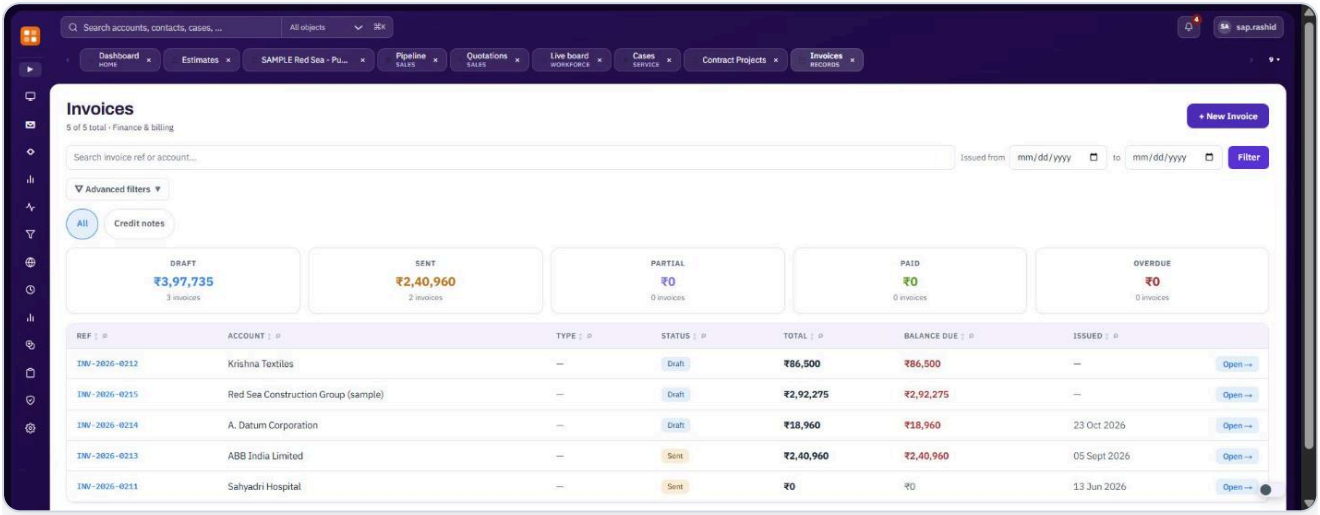


FIGURE 40 The five status tiles and the list.

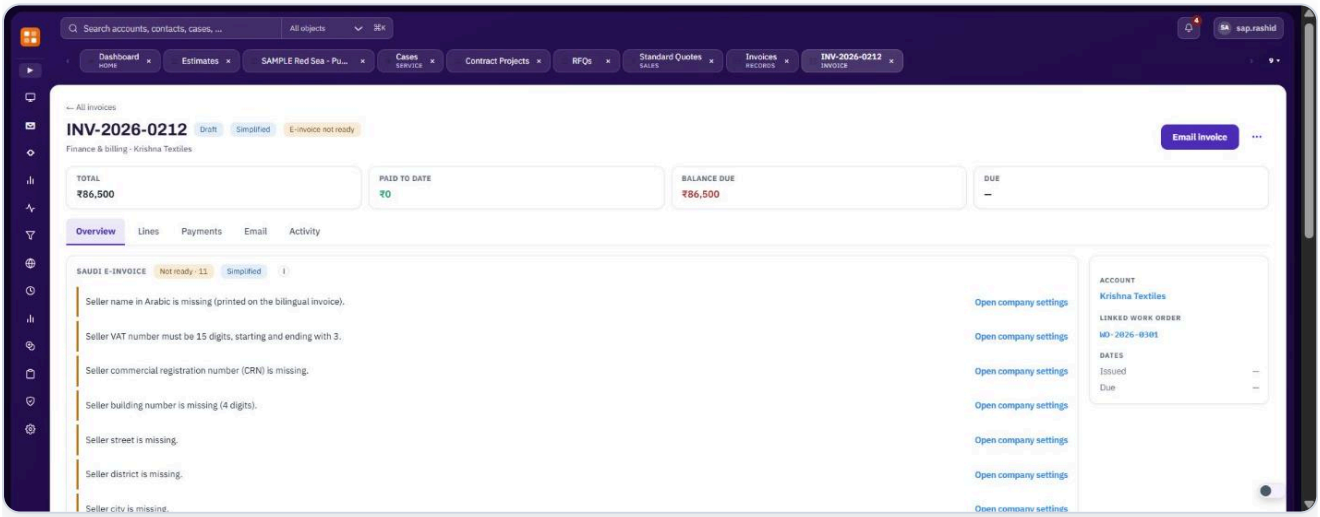


FIGURE 41 The facts (Total, Paid to date, Balance due, Due) and the right-hand column.

17. From enquiry to invoice

What it is

This is the path a sale takes through BPMSquare. There are three routes. Pick the one that matches the work.

Where to find it

It starts at **Sales > Pipeline** (route A and C) or **Sales > Quotations** (route B). It ends in **Sales > Invoices**.

Who uses it and which module switches it on

Sales, bid, finance and project staff. Modules: **Pipeline**, **Standard Quotes**, **Quotations**, **Sales Orders**, **Invoices**. Route C also needs **GCC tender deals** and **Contract projects**.

How to use it

Route A: a deal and a Standard Quote

1. Create a deal for Example Trading LLC (section 1). Add lines.
2. Select **Convert to Standard Quote**. Price the lines and **Email to customer**. Choose **Mark as sent**.
3. When the customer agrees, select **Mark accepted**. The deal closes as Won.
4. Select **Create sales order** if you use orders (section 12), and **Create invoice** (section 11 and 16).

Route B: a Quotation

1. Select **+ Create quote**, choose the type and write the scope and lines (section 10).
2. Email it and set the status. When the customer agrees, set the outcome to **Won**.
3. Select **Convert to Invoice**, or **Create sales order** first.

Route C: a tender

1. A tender arrives. Make a tender (section 2). Propose the bid decision and get it approved.
2. Upload the BOQ (section 3). Match rows to products and price all lines.
3. Fill the gaps in Costing with estimates and RFQs (section 4).
4. Submit the bid, revise it as needed, and make a Standard Quote from the winning version (section 5).
5. Record the outcome as Won and create the contract project (section 14).
6. Approve the baseline budget. Handle client changes as variations. Bill by milestone.
7. Buy out the packages and hand them over (section 15). Raise purchase orders in your purchasing system.

Statuses

Each record keeps its own statuses. They are listed in its own section.

Links to other records

- A deal holds its quotes. A quote links to its deal, order and invoice. An order links to its quote and invoices.
- A tender holds its bid versions, the Standard Quote made from a version, and the contract project. A milestone links to its invoice.

Good to know

- Choose one route per job. A Standard Quote can be billed once, and a Quotation can be converted to an invoice once. A work order's **Raise Invoice** does not look for an invoice already made from the same quotation (Chapter 3, section 7).
- Accepting a Standard Quote that came from a tender bid also tries to close the tender deal. Check the tender stage afterwards.
- References you will see: `OPP-` (deal), `SQ-` (Standard Quote), the quote ID format (Quotation), the order type prefix (Sales Order), `PO-` , `INV-` , `RFQ-` , `EST-` , `CPR-` (contract project) and `PKG-` (package).

Common questions

1. Why can I not see the Tenders tab? The tender edition is off for your workspace. Pipeline must be on, and **GCC tender deals** must be switched on by the BPMSquare team. Without it the Pipeline page is the plain deals board.

2. I proposed a bid decision but I cannot approve it. Why? The person who proposes cannot approve it, unless the workspace allows self-approval. An administrator chooses the approvers and the self-approval setting in **Settings > Sales > Tenders**. If nobody else can approve, the page says so and asks for an approver or self-approval.

3. Where do I award a supplier for a tender RFQ? On the tender's **Costing** tab, with **Compare and award**. The RFQ's own page links you there. Awarding there also puts the price on the BOQ row.

4. I emailed a Standard Quote but it is still Draft. What do I do? Emailing a Standard Quote does not change its status. Choose **More > Mark as sent**. Then **Mark accepted** appears when the customer agrees. Emailing an invoice is different: it marks a draft invoice Sent.

5. Why is there no "Create sales order" button? The button is on an **Accepted** Standard Quote and on a **Won** Quotation, and only when **Sales Orders** is on. A deal and the Inbox have no such button. You can also start an order with **+ New Sales Order**.

6. Can I send a purchase order to the supplier from BPMSquare? No. A purchase order can be marked as sent, and goods can be received against it, but it has no PDF, email or WhatsApp action at this snapshot. Send it from your own mail.

7. Can I raise purchase orders from a buy-out package? No. A package gives you an Excel with the supplier, lines, quantities, awarded rates and cost codes. The purchase order is raised in ePROMIS or your ERP. **Mark as sent to ePROMIS** records that you did it.

8. Why is there no Costing tab, Room tab or Buy-out tab? Each is a separate switch. **Costing** needs the Project Estimator or the RFQ module and a role that can view Estimates or RFQs. **Room** needs **Deal Room**. **Buy-out** needs **Contract projects**, and the project must have come from a tender. Ask your BPMSquare contact to check which modules your workspace has.

CHAPTER 3

3 Service

IN THIS CHAPTER

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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 marked "" 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 service managers, coordinators and the consultants who set Service up. It follows one job from the first call to the final invoice. A customer reports a fault. You log a **case**, inspect the equipment, quote the repair, send a technician on a **work order**, and bill the work.

The examples use a made-up customer, Example Trading LLC.

How Service is laid out

Service lives in the left menu under **Service**. It has five screens: Cases, AMC contracts, Work orders, Dispatch and Technicians. Equipment records (**Assets**) sit under **Master data**. Quotations and Invoices sit under **Sales**.

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. 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.

Contents

1. Cases (including inspection reports, photos and response times)
2. AMC contracts
3. Work orders
4. Dispatch
5. Technicians

6. Assets, including loaner units
7. From case to quote, work order and invoice
8. Common questions

Not in the product

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

- A setting for service response times (SLAs). There is no Service page under Settings.
- A way to email an inspection report. "Send report to customer" only changes the case stage (see Cases).
- A scheduling board with drag and drop. Dispatch is a read-only list.
- Creating or editing AMC contracts in the app.
- A button that lends a loaner unit to a case (see Assets).

1. Cases

What it is

A case is one repair or service job, from intake to delivery. It holds the complaint, the equipment, the technician, the inspection report, the photos and the linked quotation.

Where to find it

Service > Cases (`/cases`). New case: **+ New Case** (`/cases/new`). A case opens at `/cases/<id>` .

Who uses it and which module switches it on

Service coordinators and workshop supervisors. Module: **Cases**. Business role entry: **Cases**. A case can also be created from the shared Inbox ("Create from this email > Case") when your workspace has the Inbox module.

How to use it

Log a new case

1. Open **Service > Cases** and select **+ New Case**. From an account page you can start a case with the account already filled in.
2. Choose the **Account** (required) and the **Case type** (required): Adhoc, Direct or AMC (contract).
3. Tick the customer's equipment under **Assets (customer equipment)**. These appear once you pick an account. The **Equipment label** fills in by itself from the first asset. You can overwrite it. The label is required.
4. Write the **Complaint** (required). Add the **Symptom** if you know it.
5. Optionally choose **Assign technician**, then select **Save**. The case opens as **Intake** with a reference like `CS-2026-0001` .

Move a case through its stages

The action card at the top of the case page changes with the stage. Use its buttons to move forward.

1. Intake: add **Internal notes** and intake photos, then select **Start Inspection →**.

2. Inspection: fill in the report (next task), then **Send report to customer →**. If the customer needs no report, select **Skip report — Create Quotation**.
3. Report sent: when the customer agrees, select **Customer approved →**. This moves the case to Report approved. You can also select **Create Quotation** here.
4. Report approved: select **Create Quotation →**, or **Skip quote — Start Repair** if no quotation is needed.
5. Quote sent or Quote approved: when the customer accepts, select **Start Repair →**.
6. In repair: keep **Repair notes**, then select **Move to QA →**.
7. QA: select **QA passed — Mark Ready →**, or **Failed — Back to Repair**.
8. Ready: select **Close — handed to customer ✓**. The other two buttons end the case differently: **Buyback — customer sold unit** and **Scrap unit**.

Write an inspection report

1. While the case is in **Inspection**, fill in **Findings** (required) and **Recommendations** (required).
2. Optionally enter the **Estimated cost**.
3. Add inspection photos.
4. Select **Save draft** to keep working, or **Send report to customer →** to mark it sent.
5. After the inspection stage, the report is read-only on the case's **Inspection** tab.

Add photos

1. In the Intake or Inspection action card, choose **Add photos**. On a phone you can use the camera or the gallery.
2. Add a caption if you want, then upload.
3. Photos show on the case's **Photos** tab, grouped as Intake, Inspection and Final / delivery. While the case is still in Intake or Inspection they show inside the action card instead.

Find a case

1. Use the chips at the top of the list: Open, In repair, Awaiting, Closed, All. Each shows a count. The list opens on **Open**.
2. Search by case reference, equipment, account or complaint.
3. Sort by clicking a column heading. Add the optional **Complaint** column from the list menu.

Statuses

Case statuses are fixed. A workspace cannot rename or add to them.

Status	Stage group on the case page	How it is set
Intake	Intake	New case
Inspection	Inspection	Start Inspection →
Report sent	Report	Send report to customer →
Report approved	Report	Customer approved →
Quote sent	Quote	Saving a quotation made from the case

Status	Stage group on the case page	How it is set
Quote approved	Quote	No button in the app. Import or integration only.
In repair	Repair	Start Repair →, or Failed — Back to Repair
QA	Repair	Move to QA →
Ready	Close	QA passed — Mark Ready →
Closed	Close	Close — handed to customer
Buyback	Outside the flow	Buyback — customer sold unit
Scrapped	Outside the flow	Scrap unit

On the list, **Open** means every status from Intake to Ready. **In repair** is that one status. **Awaiting** means Report sent or Quote sent. **Closed** means Closed, Buyback or Scrapped.

Inspection report statuses are Draft, Sent to customer, Customer approved and Customer rejected. In the app you can only reach Draft and Sent. Approving the report moves the case, not the report's own status.

Links to other records

- **Account** and **Contact**: shown in the right-hand panel.
- **Assets**: one or more, shown in the panel. Use **+ Add asset** to link more.
- **Technician**: chosen at creation.
- **Quotation**: appears on the **Related** tab and as **View quotation** at the top. See chapter 7.
- **Work orders**: the **Work orders** card in the right panel, with **Create work order**.
- **AMC contract** and **Loaner dispatched**: shown in the panel when linked (see AMC contracts and Assets).
- **Sub-cases**: listed on the **Related** tab when a case has children. The app has no button to create one.
- **Supplier quotations (RFQs)**: the **Related** tab can request parts quotes from suppliers when the RFQ module is on.
- **Email it came from**: shown on the Overview tab when the case was created from an Inbox message.

Good to know

- The case reference is `CS-<year>-<number>` . Numbers count up for your workspace.
- **Case type** cannot be changed after the case is created. The guide cannot tell you how your business defines Adhoc and Direct. The product only labels them (verify with your team's own definitions).
- **Send report to customer →** only marks the report as sent and moves the case. The screen says no email is delivered. Contact the customer yourself. **More > WhatsApp the customer** opens WhatsApp with a short follow-up message about the case. It does not attach the report, and it needs a phone number on the contact or account.
- A technician can be chosen when the case is created and again when a work order is raised. There is no technician picker on the case page itself.
- Photos must be JPEG, PNG, WebP, HEIC or HEIF, up to 10 MB each. The **Final / delivery photos** group only displays photos that already exist. The case page has no uploader for that group.

- Response times: there is no SLA setting for cases. The Dashboard **Cases open** tile counts a case as "past SLA" when it is in Report sent or Quote sent and 3 or more days have passed since intake. The count starts at the intake date, not the date the report or quote went out. This rule is fixed.
- The **Closed** date on a case is not stamped when you close it in the app. It shows only when it was imported.
- Custom fields: an administrator can add fields to cases in **Settings > Custom fields**. **More > Adapt fields** on the case changes how the fields are laid out.
- Every change is recorded on the **Activity** tab.
- Data Workbench can import, export and update cases (a Record ID from an export is needed for updates). The v1 API has a read-only cases list.
- When the Nova experience is on for your workspace, the Cases list also offers Field, Lanes and List views. The Lanes view marks cases as Stuck (open more than 30 days) or Unassigned.

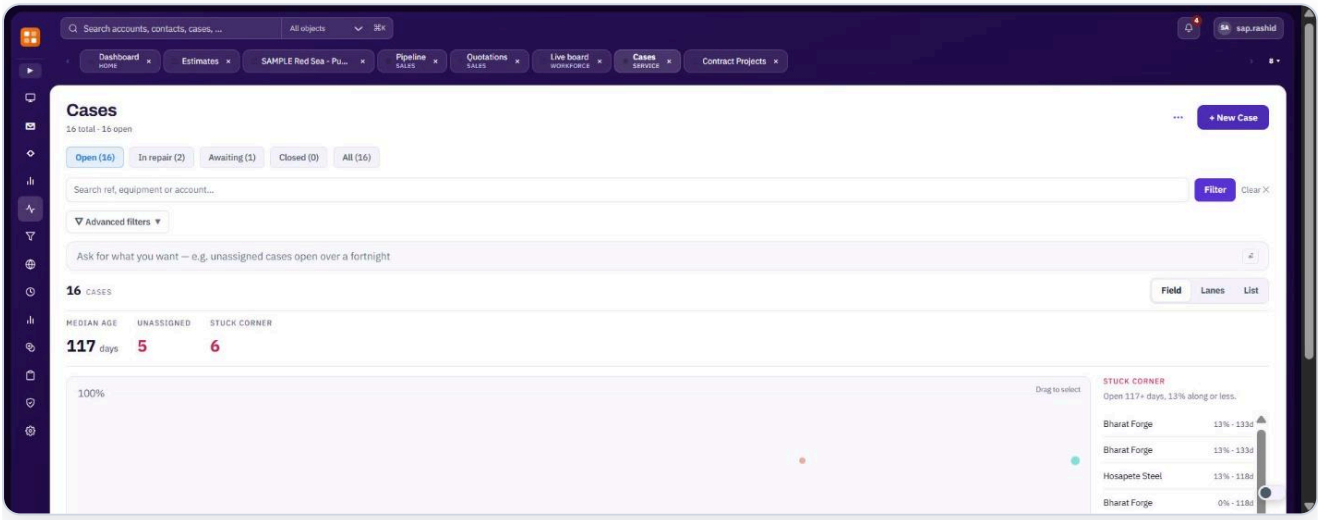


FIGURE 42 The Cases list with the status chips, search box and the + New Case button.

2. AMC contracts

What it is

AMC means annual maintenance contract. This screen lists your maintenance contracts with their dates and value, and flags the ones about to end.

Where to find it

Service > AMC contracts (`/amc`). The page title reads "AMC contracts".

Who uses it and which module switches it on

Account managers and service managers who watch renewals. Module: **AMC**. Business role entry: **AMC Contracts**.

How to use it

This screen is read-only. You cannot add, edit or open a contract in the app (verify how contracts get into your workspace, for example by an integration).

Check what is coming up for renewal

1. Open **Service > AMC contracts**.
2. Read the three tiles: **Active**, **Expiring ≤60 days** and **Active Value**.
3. Select the **Expiring ≤60 days** tile to filter the list to active contracts with 60 days or fewer left. Select it again to clear.
4. Check the **Days left** column. It turns amber when an active contract has 60 days or fewer left. It reads "Expired" once the end date has passed.

Find a contract

1. Type a contract reference or an account name in the search box.
2. Optionally choose a status in the **All statuses** list.

Statuses

Status	Meaning
Active	In force
Expired	Past its end date
Draft	Not yet in force. Shown as "draft" in plain lowercase text
Pending, Cancelled	Offered in the status filter, but the database only stores Active, Expired and Draft

Links to other records

- The list shows the **Account** by name only. Rows do not open.
- A case can show its **AMC contract** reference in the right-hand panel.
- A work order can be authorised by a contract. It then shows as **AMC** instead of **Billable**.

Good to know

- A contract is not linked to a case from inside the app. The only in-app way to authorise a work order is a quotation (chapter 7). For an AMC case, the work order step needs a contract already linked to the case (verify how).
- Data Workbench has no AMC import, export or update. The v1 API has no contracts endpoint.
- No automatic renewal email or reminder comes from this screen.

3. Work orders

What it is

A work order is one visit or job for a technician, on site or in the workshop. It records the account, the equipment, the technician, the date and the scope, and it is what you complete and then bill.

Where to find it

Service > Work orders (`/work-orders`). The page title reads "Work orders". A work order opens at `/work-orders/<id>` .

Who uses it and which module switches it on

Service coordinators (to raise and complete) and finance (to raise the invoice). Module: **Work Orders**. Business role entry: **Work Orders**. Raising one from a case also needs the **Cases** module and the create permission on Work Orders.

How to use it

Raise a work order from a case

1. Open the case. In the right-hand panel find the **Work orders** card.
2. Select **Create work order**. A side panel opens.
3. Choose the **Scheduled date**. It starts as today.
4. Optionally choose the **Technician**. It starts as the case's technician. Inactive technicians are not offered.
5. Select **Create work order**. The new work order opens with status **Scheduled**.
6. If the case already has a Scheduled or In Progress work order, the panel names it. Select **Create another** only if a second visit is needed.

If the card says "Link a quotation or an AMC contract to this case before raising a work order", create the quotation from the case first (chapter 7).

Complete the job

1. Open the work order and select **Mark Complete**. It works from Scheduled or In Progress.
2. Add the **Technician notes** and **Scope of work** through **More > Edit** if needed.
3. If your workspace has Workforce, the **Attendance** tab shows the technician's punches for the scheduled day and the net hours. When the quotation has a labour line in hours, it also shows the variance against the quotation.

Bill the job

1. When the status is **Completed**, select **Raise Invoice**.
2. A draft invoice opens. The work order becomes **Invoiced**.
3. Review and send the invoice from **Sales > Invoices**.

Find a work order

1. Use the status chips: Scheduled, In Progress, Completed, Invoiced, All.
2. Search by reference, account or asset.
3. Switch between table and cards from the list menu (**Card view** or **Table view**).

Statuses

Work order statuses are fixed.

Status	How it is set
Scheduled	New work order
In Progress	No button in the app. Import or integration only.
Completed	Mark Complete

Status	How it is set
Invoiced	Raise Invoice

Links to other records

- **Service case**: the right-hand panel and the Ref column both link back to the case.
- **Authorization** panel: **Billable** with the quotation reference and value, or **AMC** with the contract reference.
- **Account**, **Asset under service** and **Technician**.
- **Loaner dispatched**: a card appears when a loaner is linked.
- **Invoice**: created by Raise Invoice. See "Good to know" for what it contains.
- **Materials**: the **Related** tab can request supplier quotations for parts when the RFQ module is on.

Good to know

- The reference is `WO-<year>-<number>` .
- The list has no **+ New** button. Work orders are created from a case, or brought in by Data Workbench import or an integration.
- Account, asset and authorisation are copied from the case. They cannot be picked on the create panel.
- An AMC case prefers its contract. Any other case prefers its quotation. If the case has only one of the two, that one is used.
- No work order can be raised for a case that is Closed, Buyback or Scrapped.
- A quotation-authorised work order creates an invoice with the quotation's lines and total, contact and legal entity.
- A contract-authorised work order creates a draft invoice with no lines and a zero total, because a contract is billed as a period value. One labour line is added automatically only when Workforce is on, the work order has a technician and a date, logged hours exist for that day, and a Labour rate is set in **Settings > Pricing**.
- After creation, the scheduled date and the technician cannot be changed on the work order page. Decide them in the Create work order panel.
- Raise Invoice does not check whether the same quotation already has an invoice from **Convert to Invoice**. Use one route per job (chapter 7).
- Data Workbench import of work orders needs the authorising quotation reference. Contract-authorised work orders cannot be imported yet. Data Workbench can also export and update work orders.
- Custom fields can be added to work orders in **Settings > Custom fields**.

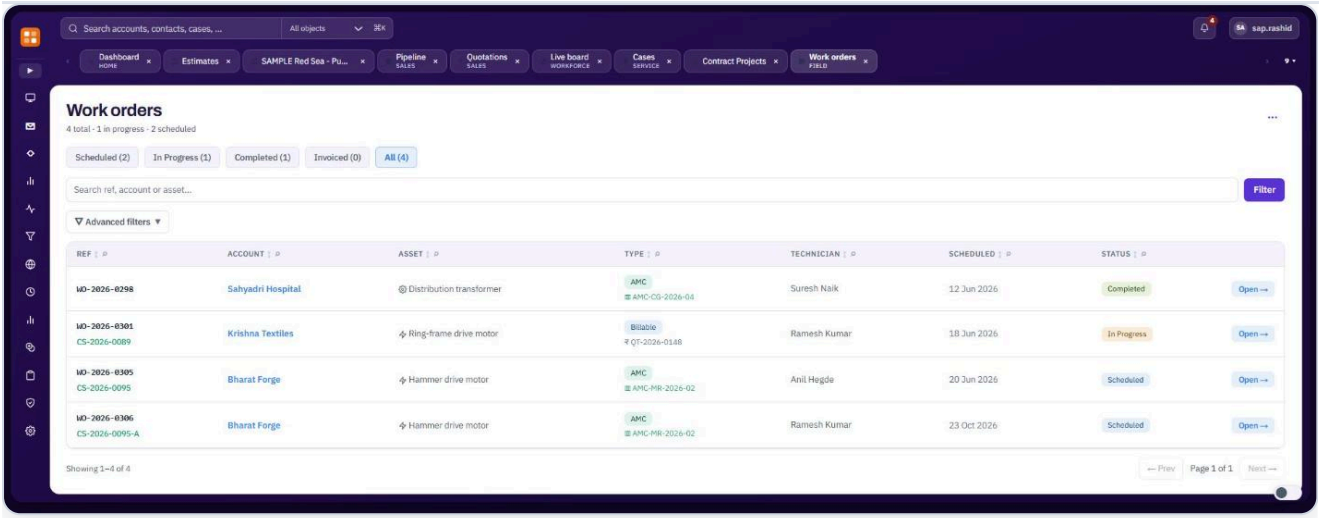


FIGURE 43 The Work Orders list with status chips and the Type column showing Billable and AMC.

4. Dispatch

What it is

Dispatch is a read-only list of all active work orders, soonest first, so a coordinator can see who is doing what and when.

Where to find it

Service > Dispatch (`/dispatch`).

Who uses it and which module switches it on

Service coordinators. Module: **Dispatch**. Business role entry: **Dispatch**.

How to use it

See the open jobs

1. Open **Service > Dispatch**.
2. Read the two tiles: **Scheduled** and **In Progress**.
3. Read the table: Ref, Account, Technician, Status, Scheduled, Case and Scope. Jobs with no date show "TBD". Jobs with no technician show "Unassigned".
4. If you have more jobs than fit one page, use the pager at the bottom.

See who is at work

1. If your workspace has the Workforce module, a badge shows next to each technician's name: On duty, On break, Off duty or On overtime.
2. Use it to decide who to send. It comes from the technician's punches.

Statuses

Dispatch shows only work orders in **Scheduled** or **In Progress**. See Work orders for the full list.

Links to other records

Each row shows the work order reference, the account name, the technician name and the case reference as plain text. The rows are not links. To open a record, go to **Work orders** or **Cases**.

Good to know

- You cannot assign, move or reschedule jobs here. There are no controls on the page.
- Rows are in scheduled-date order. The page has no filters or search, and it is not limited to today.
- The empty state reads "No active work orders to dispatch."
- Dispatch has no Data Workbench or API object of its own. It reads work orders.

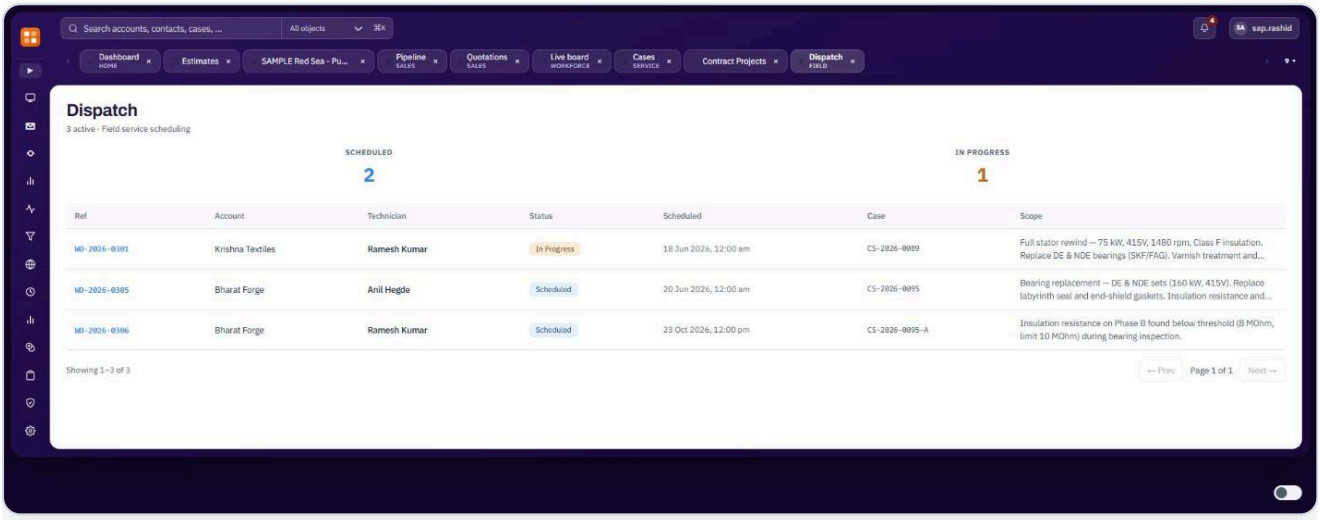


FIGURE 44 The two tiles and the table with the On duty badge next to a technician.

5. Technicians

What it is

Technicians are your field and workshop people. A technician record holds contact details, skills, certifications, leave, daily capacity and a monthly work summary.

Where to find it

Service > Technicians (`/technicians`). New: **+ New Technician** (`/technicians/new`). A technician opens at `/technicians/<id>` .

Who uses it and which module switches it on

Service managers and coordinators. Module: **Technicians**. Business role entry: **Technicians**.

How to use it

Add a technician

1. Open **Service > Technicians** and select **+ New Technician**.
2. Enter the **Full name** (required). Phone, Email and **Skills / specialisations** are optional.

3. Under **Field settings** enter the **Base location** and **Max visits / day**. The starting value is 3. Allowed values are 1 to 10.
4. Select **Save**. The technician starts as **Active**.

Check the team's capacity

1. Open the list and read the tiles: **Active today**, **On leave**, **Slots used** and **Slots free**.
2. In the **Free today** column, a figure like `2/3` means 2 of 3 daily visits are still open.
3. Use the status list and the search box (name, phone or skill) to narrow the list.

Review one technician

1. Select a technician. The top figures are Visits this month, Completed, Km travelled and Avg work time.
2. **Overview** shows skills, certifications (with a warning for any that expire within 90 days) and upcoming work orders.
3. **Schedule** is a month calendar. Use the arrows to change month. Colours mean Done, WO, Leave and Conflict. Leave entries are listed below.
4. **Visits** lists recent visit logs, with a time bar for travel, work, break and return.

Edit a profile

1. On the technician page select **More > Edit**.
2. The **Edit profile** page has Personal information, Status (Active, On leave, Inactive), Skills (comma separated), Certifications (name and expiry date) and Leave schedule.
3. Select **Save**. The changes are written, and the change is logged under **Technicians** in change history.

Statuses

Status	Meaning
Active	Can be assigned. Counted in the capacity tiles.
On Leave	Shown with "Back " when a leave entry covers today. Not counted for free slots.
Inactive	Hidden from the technician pickers on the New Case page and the Create work order panel.

Links to other records

- **Work orders**: the Overview tab lists upcoming ones, with links.
- **Cases**: a technician can be set on a case. It shows in the case panel and the Cases list.
- **Accounts**: the Visits tab links each visit to its account and work order.
- **Workforce** (if on): the live badge, and the work order Attendance tab.

Good to know

- The **Free today** figure counts work orders whose scheduled time is exactly the start of today. Work orders raised from a case are stored at midday, so they may not be counted.
- Visit logs, certifications and leave entries cannot be added from the screens. They are read from the data (verify how your workspace loads them).

- The New Case page offers only Active technicians. The Create work order panel offers every technician who is not Inactive.
- Technician records cannot be imported, exported or updated in Data Workbench, and have no v1 API endpoint.
- Technicians are separate from Employees. Attendance and leave for the workforce are handled in the Workforce module.

6. Assets, including loaner units

What it is

An asset is a piece of equipment: a motor, transformer, pump, generator or panel. Customer assets record what your customers own and what you service. Loaner units are your own spare equipment that you can lend while a customer's unit is in repair. Each asset shows its service history.

Where to find it

Master data > Assets (`/assets`). New: **+ New Asset** (`/assets/new`). An asset opens at `/assets/<id>` .

Who uses it and which module switches it on

Service coordinators, quotation writers and account managers. Module: **Assets**. Business role entry: **Assets**.

How to use it

Register a customer asset

1. Open **Master data > Assets** and select **+ New Asset**. From an account page you can start with the account already chosen.
2. Enter the **Asset name** (required) and the **Kind** (required): Motor, Transformer, Pump, Generator or Panel / Switchgear.
3. Add Make / brand, Model, Serial number, Rating / specs and Notes / history.
4. Choose the **Customer account** under **Ownership**.
5. Select **Save**. The asset gets an ID like `AST-0001` .

Register a loaner unit

1. Select **+ New Asset** and fill in the equipment details.
2. Under **Ownership** leave **Customer account** at "None (loaner / workshop stock)".
3. Tick **This is a loaner unit** and select **Save**. The unit starts as Available.

Find an asset's history

1. Open the asset and select the **Service history** tab. It shows when the Cases module is on.
2. Open cases are listed first, then closed ones. Select **+ New Case** to start a case for the same account.

Check loaner stock

1. On the Assets list, read the **Loaner Stock** card above the table. It shows how many units are on loan and how many are available.

2. Each unit shows Available (marked "Ready for dispatch") or On Loan (with the account and case it is with).
3. Choose **Loaner stock** in the type list to show only that card.

Statuses

Assets have no workflow status. Loaner units carry a loan state.

Loaner state	Meaning
Available	In stock and ready to lend
On Loan	Lent to a customer's case

Links to other records

- **Account**: the owner. Loaners have none.
- **Cases**: the Service history tab, and the **Open cases** column on the list.
- **Quotations**: assets can be attached to a quotation, and a Settings choice decides which asset fields print on it.
- **Work orders**: the **Asset under service** card.

Good to know

- Nameplate fields (speed, frame type, insulation class, connection, duty, ambient temperature, output kW, stator and excitation voltage and current, frequency) show only when the Kind is **Motor**.
- The case form lists customer assets only, never loaner units.
- The app has no button that lends a loaner to a case or marks it On Loan. When a loaner is linked to a case by import or integration, it appears as "Loaner dispatched" on the case and the work order, and the Loaner Stock card shows it On Loan.
- Data Workbench can import, export and update assets. A blank account on import makes the unit company-owned loaner stock.
- The Analytics screen has a Loaner availability gauge.
- Custom fields can be added to assets in **Settings > Custom fields**.

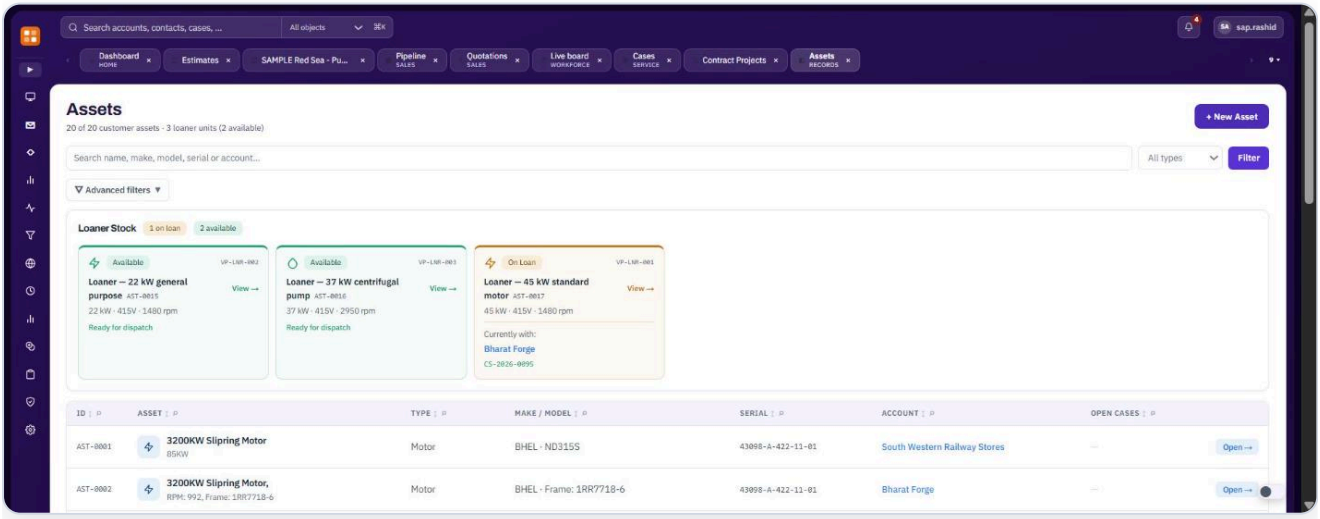


FIGURE 45 The Loaner Stock card above the customer assets table.

7. From case to quote, work order and invoice

What it is

This is the path a repair takes through BPMSquare. Two routes lead to an invoice.

Where to find it

It starts at **Service > Cases**. It continues in **Sales > Quotations**, **Service > Work orders** and **Sales > Invoices**.

Who uses it and which module switches it on

Service coordinators and sales or finance staff. Modules: **Cases**, **Quotations**, **Work Orders** and **Invoices**.

How to use it

Route A: quote the repair, then convert to an invoice

1. On the case, select **Create Quotation** (or **Create Quotation →**). It is offered at the Inspection, Report sent and Report approved stages.
2. The New Quotation form opens. A blue box says "Creating quotation from case ...". Select **Yes, carry over** to take the account, the assets and the findings and recommendations into the quotation notes, or **Start fresh**.
3. Add the lines and save the quotation. The case now holds the quotation and moves to **Quote sent**.
4. When the customer accepts, set the quotation's outcome to **Won**.
5. On the quotation select **Convert to Invoice**. A draft invoice opens. The button changes to **View invoice** after that.
6. Back on the case, select **Start Repair →**.

Route B: send a technician, then bill the work order

1. On the case, select **Create work order** in the **Work orders** card (see chapter 3). The case must already have a quotation.
2. After the visit, select **Mark Complete** and then **Raise Invoice** on the work order.

Statuses

Record	Statuses
Case	Intake to Closed (see chapter 1)
Quotation	Draft, Sent, Approved, Rejected by default. A workspace can change these in **Settings > Quotations**.
Quotation outcome	Open, Won, Lost, Dropped
Work order	Scheduled, In Progress, Completed, Invoiced
Invoice	Draft, Sent, Partial, Paid, Overdue, Cancelled

Links to other records

- The case holds the quotation and shows it on the **Related** tab.
- The work order holds the case, and an authorisation (the quotation or the AMC contract).
- A work order invoice keeps links to the work order, the case and the quotation or contract.

Good to know

- A work order needs a quotation (or an AMC contract) on the case. Creating the quotation from the case is the in-app way to link one.
- The quotation is linked to the case when the quotation is saved, not when you open the form. A quotation made separately in Quotations is not linked to a case.
- Saving a quotation made from a case moves the case to **Quote sent**. Marking the quotation Won does not move the case. Move it yourself with **Start Repair →**.
- Convert to Invoice works only on a Won quotation, once, and only on the latest version. It needs the Invoices module.
- **Raise Invoice** on a work order does not look for an invoice already made from the same quotation. Choose one route per job, or you may bill twice.
- Standard Quotes are not part of this flow. Cases create Quotations (verify for your workspace if you use Standard Quotes for service work).

Common questions

1. Why can't I find a "New work order" button? Work orders are raised from a case. Open the case and use **Create work order** in its Work orders card. The Work Orders list has no new button.

2. The Work orders card says to link a quotation or an AMC contract. What do I do? A work order needs something that authorises the work. For a repair, create a quotation from the case (**Create Quotation**) and save it. The quotation is then linked and the card shows **Create work order**.

3. I selected "Send report to customer". Why did the customer get nothing? That button only marks the report as sent and moves the case to Report sent. Nothing is emailed. Contact the customer yourself.

4. Can I set a service response time (SLA)? No. There is no SLA setting. The Dashboard shows "past SLA" for cases in Report sent or Quote sent when 3 or more days have passed since intake. That rule is fixed.

5. Can two work orders exist for one case? Yes. If one is already Scheduled or In Progress, the panel names it and asks you to confirm with **Create another**. This also stops an accidental double click from making two.

6. Why is my contract-based work order invoice empty? A contract is billed as a period value, so the invoice starts with no lines. Add the lines before you send it. If Workforce is on and the technician logged hours that day, one Labour line is added for you, based on the Labour rate in **Settings > Pricing**.

7. Can I change the date or technician on a work order after creating it? Not on the work order page. Decide them in the Create work order panel.

8. How do I add AMC contracts? The AMC screen is read-only. Ask your BPMSquare contact how contracts are loaded for your workspace.

CHAPTER 4

4 Workforce (WFM)

IN THIS CHAPTER

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Screen names and button words may be refined as the product improves. If a name in this guide is slightly different on your screen, look for the same idea nearby. Items that say “verify” were read from the product code but not confirmed on a live screen.

What this chapter covers

Workforce records who worked, when, where and for which job. It turns punches into hours, late marks, leave, overtime and a monthly summary that payroll can use. It is for three kinds of reader:

- **Employees** who punch in and out, ask for leave and fix mistakes.
- **Supervisors** who watch the day, approve requests and plan the roster.
- **Administrators and implementation consultants** who set up shifts, sites, leave types and rules.

Workforce is bought as two modules. The BPMSquare team switches them on for your workspace. Nobody in your company can switch them on or off.

Module	What it gives you
Workforce (Attendance & Leave)	Everything in this chapter except Projects
Workforce, Project Costing	The Projects screen, hours per project, budget, billing, and the project choices on the Roster

If you do not see a menu item, the module is not on for your workspace, or your role does not include it. Ask your administrator first, then us.

Contents

1. Who can do what

2. My Workforce
3. Door tablet (kiosk) and face punch
4. Live board
5. Workforce employees
6. Corrections
7. Roster and shifts
8. Projects
9. Leave and holidays

10. Overtime 11. Time summary and exports 12. Settings > Workforce at a glance 13. Common questions

Who can do what

Roles

Role	Who it is	What they see
Employee	A person whose login is linked to an employee record, with the role "Employee"	**My Workforce** only
Supervisor	An employee with the role "Supervisor", a workspace administrator, or a login with an explicit edit grant on the Workforce area in Business Roles	Every Workforce screen, limited to their own people
Administrator	A workspace administrator	Everything, across all sites. Only an administrator can change shifts, sites, leave types, holidays, projects and kiosks

Menu path for everyone: **Workforce** in the left menu. The group holds: **My Workforce**, **Live board**, **Workforce employees**, **Corrections**, **Roster**, **Projects**, **Leave & Holidays** and **Time Summary**. An employee sees only **My Workforce**. **Projects** appears only when the Project Costing module is on.

Whose people a supervisor sees

A supervisor does not see the whole company. They see:

- Employees whose **Home site** is a site they supervise, or who are rostered onto that site for the dates in view.
- Every supervisor who reports to them (through the **Supervisor** field on the employee), and those supervisors' people, to any depth.
- Never themselves. A supervisor's own attendance belongs to their manager.

An administrator sees everyone.

A site has one **Supervisor** and can also have extra **Also approve here** people. Both can approve for that site. Set them in **Settings > Workforce > Places**.

Who can approve what

- Approval is judged against the site the employee was **assigned to on the date of the request**, not the site they are on today. A later roster change does not move an old request to someone else.

- **Nobody approves their own request, not even an administrator.** The same applies to changing your own punch times.
- A request from an employee who has no site cannot be approved by a site supervisor. The error says to set their site first.
- A site with no supervisor and no extra approver shows the error "has no supervisor or approver assigned". Only an administrator can still approve.

Switching on a supervisor

When an employee is saved with the role **Supervisor**, their linked login is promoted to workspace administrator. Demoting them later does not remove that. Plan for this when you choose who becomes a supervisor.

My Workforce

What it is

The employee's own page. It is where people punch in and out, see their day, ask for leave, file corrections and read announcements. It works in a phone browser and can be added to the home screen. Supervisors use the same page for their own attendance.

Where to find it

- Menu: **Workforce > My Workforce**. URL path: `/wfm/me` .
- The link **My Details** (top right) opens `/wfm/me/details` with the tabs **Time**, **Requests**, **Profile**, **Timeline** and **Calendar**. **Back to punch** returns.
- After sign-in, the workspace can open this page straight away (**Settings > Workforce > Rules > More > After sign-in, open**). Otherwise people land on the Dashboard.

Who uses it

Employees, supervisors and administrators who have a linked employee record. Switched on by the **Workforce (Attendance & Leave)** module. A login with no linked employee sees "No employee profile" and is told to ask a supervisor to add them.

How to use it

Give consent (first time only)

1. Open **My Workforce**. The screen "Before you start" explains what is captured: a selfie, and your location converted to a street address.
2. Read it and tap **I agree**. Until you do, nothing can be punched.

Punch in, take a break, punch out

1. Open **My Workforce**. The tile shows four large buttons: **Check in**, **Check out**, **Break start**, **Break end**. All four are always on screen. Only the ones that are valid right now are lit.
2. Tap **Check in**. The phone asks for the camera (when a selfie is required) and for your location.
3. On the camera screen, tap **Capture & punch**.

4. A message confirms the time and the site, for example "Check in recorded at 09:02 at Main office".
5. Tap **Break start** when you go on break and **Break end** when you return. Tap **Check out** at the end of the shift.

Use overtime, work from home or a site visit

1. Open the **Other...** list under the four buttons. It appears only when something else is available.
2. Pick the punch (for example **OT in**) and tap **Go**. Nothing is pre-selected, on purpose, so a stray tap cannot record a punch.
3. Work from home and site visit need to be switched on in Settings. Work from home also needs an approved request for the day (see Overtime and the Requests tab).

Ask for leave

1. Open **My Details > Requests**.
2. Tap **+ Request leave**. Drag across the calendar or type the dates.
3. Choose the **Leave type**. The list shows the days left. For a single day you can choose **Half-day**.
4. Add a **Reason** and tap **Submit request**. The request shows as pending until a supervisor decides.

Ask for a correction

1. Open **My Details > Time** and tap **+ Request correction** (or click a day on **Timeline** and raise it from there).
2. Fill **Date**, **Correct time**, **Issue** and **Reason**, then tap **Submit**.
3. Nothing changes until a supervisor approves. See Corrections.

Ask a supervisor a question about a punch

1. Open **My Details > Requests > Clarifications** and tap **+ Ask a question**. You can tie the thread to a punch, a correction, an overtime session, or leave it general.
2. Either side replies in the thread. Either side can mark it resolved. A new message reopens a resolved thread.

Statuses

Punch state, as shown on the tile:

Shown	Meaning
Not checked in yet	No punch today
You're checked in	A session is open
On break	A break is open
On overtime	An overtime session is open
Checked out for today	The last session is closed

Day status, as shown on **Time** and **Timeline**:

Status	Meaning
Present	At least one punch that day
Late	First check-in after the shift start plus its grace minutes
Absent	No punch on a working day
Leave	Covered by a leave record
Holiday	A company holiday that applies to you
Week off	A weekly off day, or a rostered day off
Incomplete	A past day with a check-in and no check-out

Request status (leave, correction, overtime/work from home): **pending**, **approved**, **rejected**.

Rules that surprise people

- **Punching is a strict sequence.** You can only check in when out, take a break when in, and so on. A punch that does not fit is refused with a message such as "Cannot check in while in".
- **Overtime cannot sit inside a shift.** The overtime punch is only offered when you are checked out.
- **A punch cannot be earlier than your last punch.** It is refused.
- **Offline punches are kept on the phone and sent later.** The server accepts a punch time up to 7 days old and up to 5 minutes in the future. An older queued punch is declined and listed on the page as "could not be recorded", with a **Dismiss** button. Raise a correction for it.
- **A forgotten check-out does not block the next day.** On a new shift day the state resets, so you can check in. The earlier day stays **Incomplete**.
- **Incomplete days do not count.** The hours of an incomplete day are left out of the month's working- hours total until the day is corrected.
- **The punch is saved first and the selfie is sent after.** A missing photo cannot stop the punch from being recorded. Such a punch is marked so a supervisor can find it.
- **A denied camera ends the punch** when a selfie is required. Location problems show a help card with a retry.
- **Location is also required for breaks** when "Require location" or "Reject the punch" is on. Overtime, work from home and site visit punches are never blocked for location.
- **A weak location is flagged, not refused.** If the accuracy is worse than 200 metres the punch is saved with a "Location unreliable" flag.
- **The 2nd Saturday can be a holiday.** When the alternate-Saturday rule is on, starting a normal session on a 2nd Saturday is refused. Use **OT in** instead, which a supervisor must approve.
- **Where a supervisor turns phone punching off for you,** the tile shows the text "Punch in and out at the office kiosk" instead of buttons. Leave and corrections still work.
- The consent text is fixed and mentions a selfie "at every check-in, check-out and break" and the Indian DPDP Act, whatever your selfie setting is (verify wording with your legal adviser).
- The time you type in a correction is read in the phone's own timezone, not the workspace timezone.

Settings that change it

All in **Settings > Workforce** (administrator only).

Setting	Tab	Effect on this screen
Extra punch types (Overtime, Work from home, Site visit)	Rules	Adds those choices to **Other...**
Selfie with a punch	Rules	Which punches show the camera: "Check in, check out, breaks, trips", every punch, or never
Keep selfies for (days)	Rules > More	Selfies older than this are deleted each night. Enrolment photos are kept
Employee self-service	Rules > More	**Off, tablet only** removes phone punching for everyone
After sign-in, open	Rules > More	Dashboard or My Workforce
Outside every site	Places	Keep and mark, reject, or no location check
Require location to check in and out	Places	Refuses the punch with no location
Alternate Saturdays	Rules > More	The 2nd Saturday becomes a holiday for punching
Punch-out reminder, Break reminder	Alerts	Phone notification after N hours worked or N minutes on break. Employees must tap **Turn on** on the page
Holiday digest	Alerts	A Monday message listing the week's holidays
Per person: **Workforce employees > Edit > Punching** can override the workspace default (see Workforce employees).		

Door tablet (kiosk) and face punch

What it is

A wall-mounted tablet at a site where people punch by showing their face. No login is needed on the tablet. It is the main punch method for a site-based workforce, and the only one when phone punching is off. A separate, optional check compares each phone selfie with the enrolled face.

Where to find it

- Tablet page: `/kiosk` (no menu item; open it in the tablet's browser).
- Register a tablet: **Settings > Workforce > Places > Register a tablet** (`/settings/workforce?tab=places`).
- Enrol a face: **Workforce employees** (Face column) or **My Workforce** (the "Set up face punch" card).

Who uses it

Employees punch on the tablet. Administrators register tablets. Supervisors or the employee enrol faces. It needs the **Workforce (Attendance & Leave)** module and **Face punch = Door tablet** in Settings. The face service must also be configured on the server, otherwise the tablet says "Face service is not configured yet".

How to use it

Register a tablet (administrator)

1. Open **Settings > Workforce > Places**. Add the site first if it does not exist.
2. Under **Register a tablet**, type a **Tablet name** (for example "Main door") and choose the site, then tap **Get code**.
3. Copy the code with **Copy**. It is shown once.
4. On the tablet, open `/kiosk` , paste the code in "Set up this kiosk" and tap **Register kiosk**. This is done once.
5. If the code is lost, tap **New code** on the tablet's row. To stop a tablet, tap **Deactivate**.

Enrol a face

1. Set **Face punch** to **Door tablet** in **Settings > Workforce > Rules > More**.
2. An employee opens **My Workforce** and taps **Set up** on the "Set up face punch" card. Or a supervisor taps **Enroll** in the Face column of **Workforce employees**.
3. Consent is recorded as part of enrolling. Up to 3 photos are taken. If no usable face is found, retake in better light.
4. To remove a face, tap **Remove** next to the **Enrolled** label.

Punch on the tablet

1. Tap **Tap, then look at the camera**.
2. The tablet greets you ("Hi Asha") and shows only the buttons that are valid: **Punch in**, **Punch out**, **Start break**, **End break**.
3. Tap one within 12 seconds. A green confirmation appears. If it is not you, wait or ask your supervisor.
4. To change the tablet's site, use the small settings button and **Unregister this tablet**, then enter the correct code.

Statuses

Item	Values
Face enrolment	Enrolled, not enrolled
Tablet	Active, deactivated
Punch source on records	Kiosk (shown as a "Kiosk" label in the correction view)

Rules that surprise people

- **A face match is not a punch.** The person must still tap a button. The match only proves who is at the door.
- **The tablet offers only legal punches.** The sequence rules are the same as on a phone, and are re-checked when you tap.

- **A repeat tap of the same button within 20 seconds counts as the same punch.** It is not recorded twice.
- **Tablet punches take the tablet's site.** They are always marked as inside the fence. The selfie stored is the camera frame that was matched.
- **Tablets cannot punch overtime, work from home or site visit.** Those are phone-only.
- **No late-arrival email is sent for tablet punches.** The Live board and the summary still mark lateness, because they work it out when read.
- **Tablets do not apply the 2nd Saturday rule or the consent check on punch**.
- **Removing or deactivating an employee removes their face data** (best effort).
- **Face sign-in and Passkey sign-in are separate options.** Face sign-in lets a person log in by face. It uses a stricter match than a punch and, without a liveness check, a photo of the person could fool it. Leave it off unless you accept that.
- **Check selfies against the face** (Rules > More) only flags a mismatch. It never blocks a punch.

Settings that change it

Setting	Tab	Effect
Face punch	Rules > More	Off or Door tablet. Off switches the whole kiosk and enrolment off
Face sign-in	Rules > More	Login by face
Check selfies against the face	Rules > More	Off, or flag a mismatch (shown as "Face mismatch" on the Live board)
Passkey sign-in	Rules > More	Phone fingerprint or Face ID login
Keep selfies for (days)	Rules > More	Selfie deletion
Register a tablet	Places	Codes, new codes, deactivation

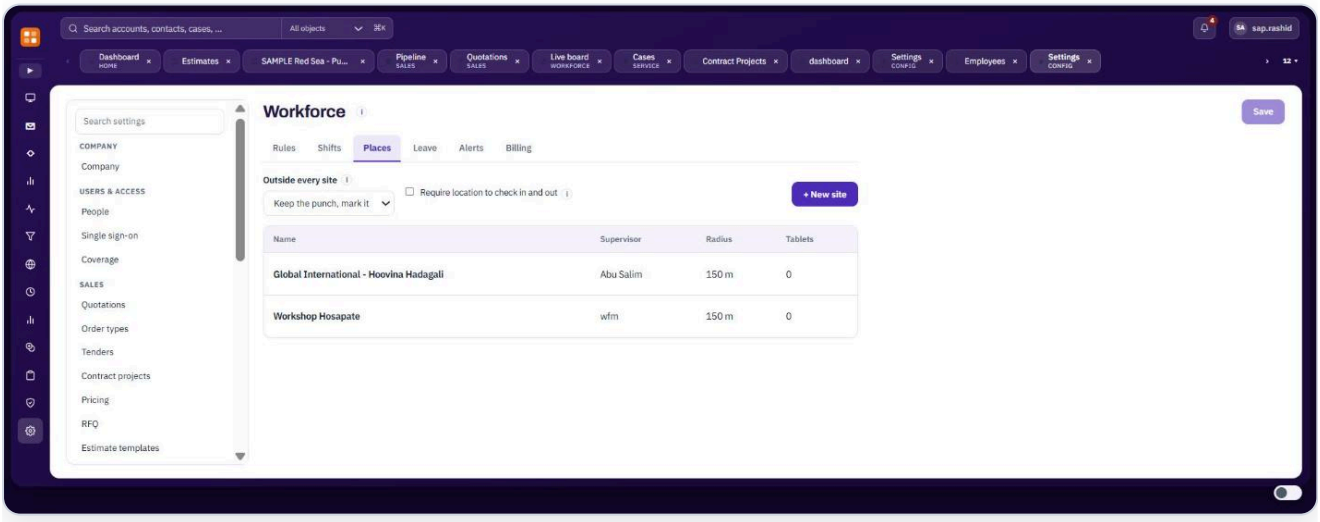


FIGURE 46 The Register a tablet row with a new code shown

Live board

What it is

A real-time picture of today: who is in, on break, out, late, absent or on leave, grouped by site. It refreshes by itself every 30 seconds.

Where to find it

Menu: **Workforce > Live board**. URL path: `/wfm/live-board` .

Who uses it

Supervisors and administrators. A site supervisor sees only their own people. Switched on by the **Workforce (Attendance & Leave)** module.

How to use it

1. Open **Live board**. The donut **Right now** shows the headcount split by status. Click a slice to filter.
2. Use the tiles **Checked in**, **On break**, **Late**, **Absent**, **On leave** and **Geofence flags**. Each tile is also a filter.
3. Narrow with **Search name, code or shift...**, the **All sites** list or the **All statuses** list. The counter shows "N of M".
4. Click a row to see that person's punches with selfies and locations.
5. To question a punch, click **Flag for review** on it. Choose **What needs review?** (**Time and selfie**, **Time only**, **Selfie only**), write a **Message to employee**, and send. The employee sees it on their My Workforce page and can reply.
6. Use **On login, show me** (top right) to choose whether you land on the Live board or the Dashboard after sign-in.

Statuses

Status	Meaning
In	Checked in
On break	On a break
On leave	A leave record covers today (this wins over everything else)
Absent	Not in, and the shift's start plus grace has passed
Checked out	Has punched today and is now out (the row pill reads "Checked out")
Not in yet	No punch yet, and not yet past the grace time

Flags on a row: **Outside geofence**, **Face mismatch**, **Location unreliable**. **Late** is a note beside the first-in time.

Rules that surprise people

- **Late and absent use today's rostered shift,** and fall back to the employee's standing shift. Someone rostered on nights is not late against a day shift.

- **No lateness or absence is marked** on a holiday, a weekly off day, a rostered day off, or when the person is on leave. A banner says so.
- **No shift means no late or absent.** An employee with no shift is never marked either.
- **Rows are grouped by Home site,** not by the site of the punch.
- **Geofence flags** counts people who have any punch today marked outside the fence.
- The "Contractor" label on a row is shown for the employment-type code `contractor` only (verify for your own types).
- Obsolete employees still appear until their last day.

Settings that change it

Setting	Tab	Effect
Timezone	Rules	The day, the shift times and "today"
Weekly off days	Rules	No late or absent on those days
Grace (minutes) on the shift	Shifts	How late is late
Outside every site, Sites and radius	Places	What counts as outside the fence
Late arrival (Supervisor email)	Alerts	Emails the supervisor on a late check-in (phone check-ins only)

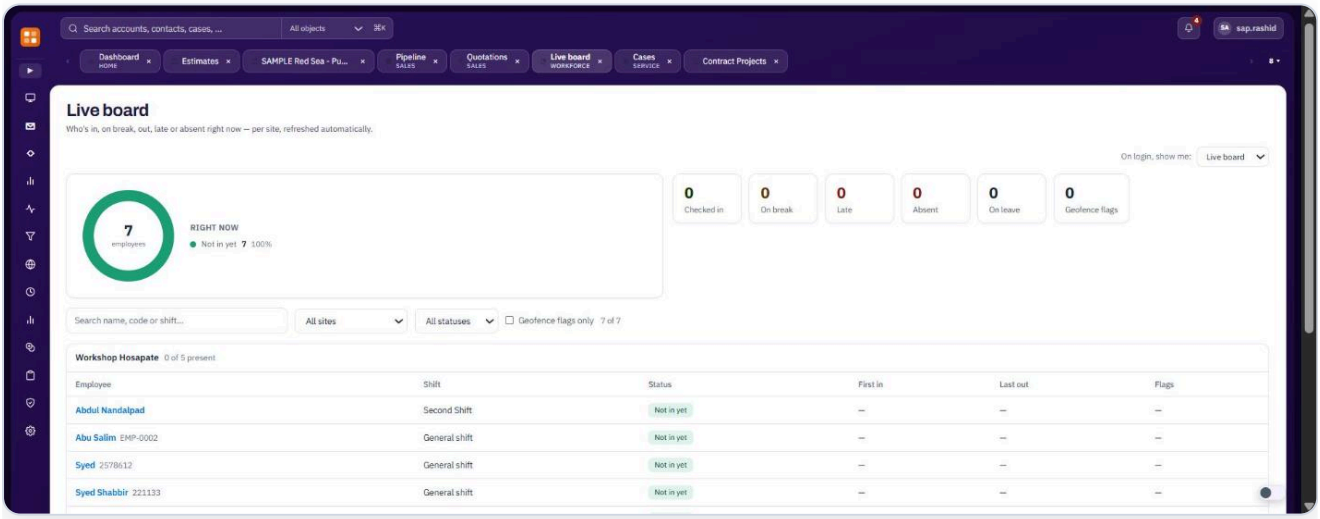


FIGURE 47 The donut, the six tiles and the site-grouped table

Workforce employees

What it is

The list of people for attendance, with their role, shift, home site, who they report to, whether they can punch from a phone, and whether they have a login and consent. Each person also has a page with their month at a glance.

Where to find it

- Menu: **Workforce > Workforce employees**. URL path: `/wfm/employees` . The screen title reads **Workforce employees**.
- One person: click the name, or open `/wfm/employees/{id}` .
- HR details (name fields shared with the rest of the product) live in **Master data > Employees**. Bulk loading is done in **Data Workbench**.

Who uses it

Supervisors and administrators, within their own people. Switched on by the **Workforce (Attendance & Leave)** module.

How to use it

Add an employee

1. Tap **+ New employee**.
2. Fill **First name** (required), **Last name**, **Phone**, **Type**, **WFM role**, **Shift** and **Home site**. The **Code** (EMP-####) is assigned for you and cannot be edited later.
3. Tap **Create**.

Give them a login

1. Tap **Edit** on the person.
2. Enter **Set up login (email)** and an **Initial password** of at least 8 characters, then **Save**. The person is asked to change the password at first sign-in.
3. If your workspace signs in by **User ID** (Rules > More > Sign in with), use **Create login** (or **Reset password**) on the row instead.

Set where and how they work

1. **Edit** the person.
2. Set **Shift**, **Home site**, **Supervisor** and **WFM role**.
3. Set **Punching** to **Workspace default**, **Kiosk only**, or **Phone punch + kiosk**. This beats the workspace setting for this one person.
4. Tap **Save**.

Enrol or remove a face

1. When Face punch is on, the **Face** column appears. Tap **Enroll** or **Remove**.

Retire an employee

1. Tap **Make obsolete**. To undo it, tap **Make active again**. The list switches to "All statuses" so you can still see the row.

Correct a day's punches (supervisor)

1. Open the person, go to the **Attendance** tab and tap **Correct** on the day.
2. In the **Correct time** window, tap **Change** on a punch, or **+ Add a missing punch**.

3. Enter the **Correct time** and **Why are you changing it?** (at least 5 characters). The employee sees the reason.
4. Tap **Save change**.

Statuses

Item	Values
Employee	Active, Obsolete
Login	Linked, No login
Consent	Given, or blank
Punching	Workspace default, Kiosk only, Phone + kiosk (Work from home and Site visit modes appear only for people who already had them)
WFM role	Employee, Supervisor

The person page has tabs **Overview**, **Attendance**, **Corrections**, **Leave**, **Roster** and **Flagged**.

Rules that surprise people

- **Obsolete is a date, not a delete.** The person is made inactive and the last day is stamped as today. Reports count them up to that date.
- **Making someone obsolete stops their punching** (only active employees can punch) **but does not by itself remove their login or supervisor access** (verify; the owner is addressing this separately).
- **Supervisor means administrator.** Saving someone as Supervisor promotes their login to workspace administrator.
- **Supervisor edits are bounded.** A supervisor can change a time only in this month and the previous month. Older dates are refused.
- **A direct change needs a reason, cannot move a punch by more than a day, cannot be in the future,** and cannot be done to yourself. Overtime punches cannot be changed here. You can add only Check in, Check out, Break start or Break end.
- **A direct change is logged as an already-approved correction** so the employee sees what changed and why.
- A supervisor's reach is limited to their own people (see Who can do what). An administrator sees all.
- Employee types come from your own list (Settings > Workforce > Rules > More > Employment types).

Settings that change it

Setting	Tab	Effect
Employment types	Rules > More	The **Type** choices and the sheets in the payroll export
Sign in with	Rules > More	Email or User ID logins
Employee self-service	Rules > More	The default for **Punching**
Face punch	Rules > More	Shows the **Face** column

Setting	Tab	Effect
Shifts, Sites	Shifts, Places	The lists behind **Shift** and **Home site**

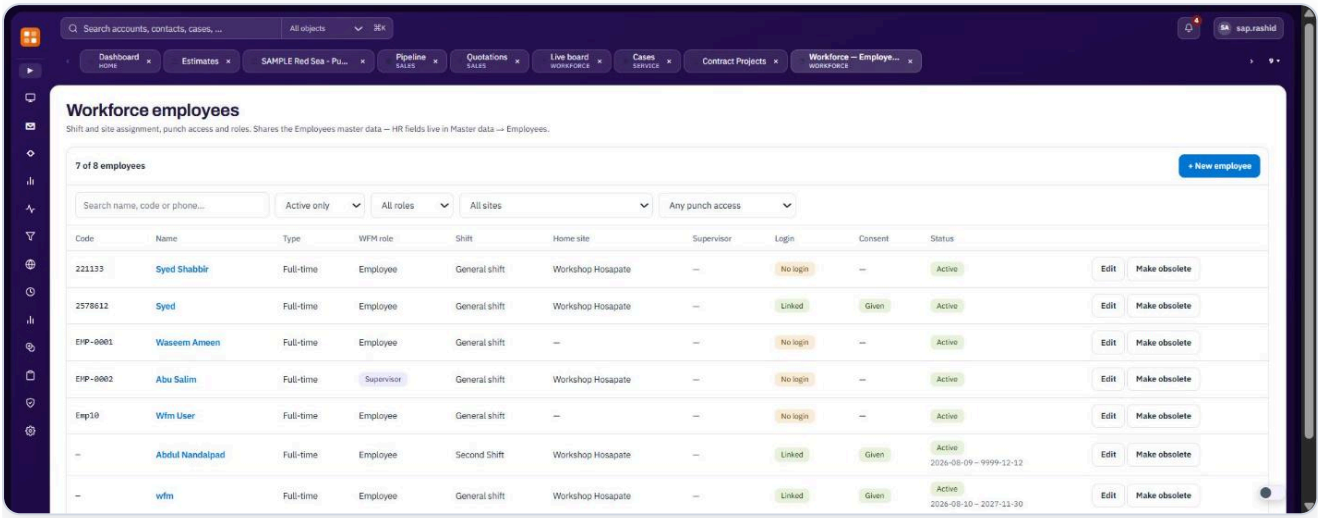


FIGURE 48 The employee table with filters, Punching, Login, Consent and Face columns

Corrections

What it is

The place where wrong or missing punches are fixed. Nothing is ever edited in place. An approval adds a new punch and retires the old one, so the history stays.

Where to find it

Menu: **Workforce > Corrections**. URL path: `/wfm/corrections` . Tabs: **Corrections**, **Flagged for review**, and **Overtime** (only when overtime is switched on).

Who uses it

Supervisors and administrators approve. Employees file requests from **My Details**. Switched on by the **Workforce (Attendance & Leave)** module.

How to use it

Approve or reject a correction

1. Open **Corrections**. The list shows **Pending** requests first (use **All** to see decided ones). Search by employee, code or reason, or filter by issue type.
2. Read **Issue**, **Reason** and **Proposed time**.
3. Tap **Approve**, or tap **Reject**, type a **Reason (required)** and tap **Confirm**.

Flag a punch you doubt

1. On the **Live board**, open the person and tap **Flag for review**.
2. Follow up on the **Flagged for review** tab. Filter by **Awaiting employee**, **Employee replied**, or **All**.
3. When satisfied, tap **Resolve**. To close it without action, tap **Dismiss**.

Fix it yourself instead

1. Use **Workforce employees > person > Attendance > Correct**. See the previous section.

As an employee, file a request

1. **My Details > Time > + Request correction**. Choose **Issue**: **Missing check-in**, **Missing check-out**, **Missing break start**, **Missing break end**, **Wrong time** or **Other**.
2. Enter the **Correct time** and a **Reason**.

Statuses

Corrections	Meaning
pending	Waiting for a supervisor
approved	Applied to the timesheet
rejected	Not applied; the reason is shown to the employee

Flagged for review	Meaning
pending (Awaiting employee)	The employee has not replied
responded (Employee replied)	Waiting for the supervisor
resolved / dismissed	Closed

Rules that surprise people

- **Approving moves the hours everywhere.** The corrected punch replaces the old one in the timesheet, the summary, the Excel export and project hours. No second step is needed.
- **"Other" changes nothing.** It is only a note. Every other issue writes a punch on approval.
- **Two supervisors cannot both approve.** The first decision wins. The second sees "already resolved".
- **The proposed time must be near the date.** It must fall within a window from 12 hours before the day to 36 hours after its start, so a night shift still works.
- **Rejecting needs a reason.** The employee is told.
- **Employees can pick any past date** in the form. There is no age limit on an employee's request (only a supervisor's direct change has the two-month limit).
- **"Wrong time" cannot be filed from the phone form** as it stands: the form does not pick the punch, and the server then refuses with "Pick the punch you want corrected". Ask the employee to file "Missing check-in/out" with the right time, or have a supervisor use **Change**.
- **Rechecks are not scoped.** A supervisor can resolve or dismiss a flagged-for-review item without the site check applied to approvals.
- **A flag is not a correction.** The employee's reply is words only. To fix a time they still file a real correction, which links back to the flag.

Settings that change it

Setting	Tab	Effect
Correction (Supervisor, Employee)	Alerts > Email	Emails the supervisor when a request is filed, and the employee when it is decided
Flagged punch (Employee)	Alerts > Email	Emails the employee when a punch is flagged
Clarification message	Alerts > Email	Emails the other side of a thread
Overtime (Extra punch types)	Rules	Shows the **Overtime** tab

Email alerts need email sending set up in **Settings > Email output**.

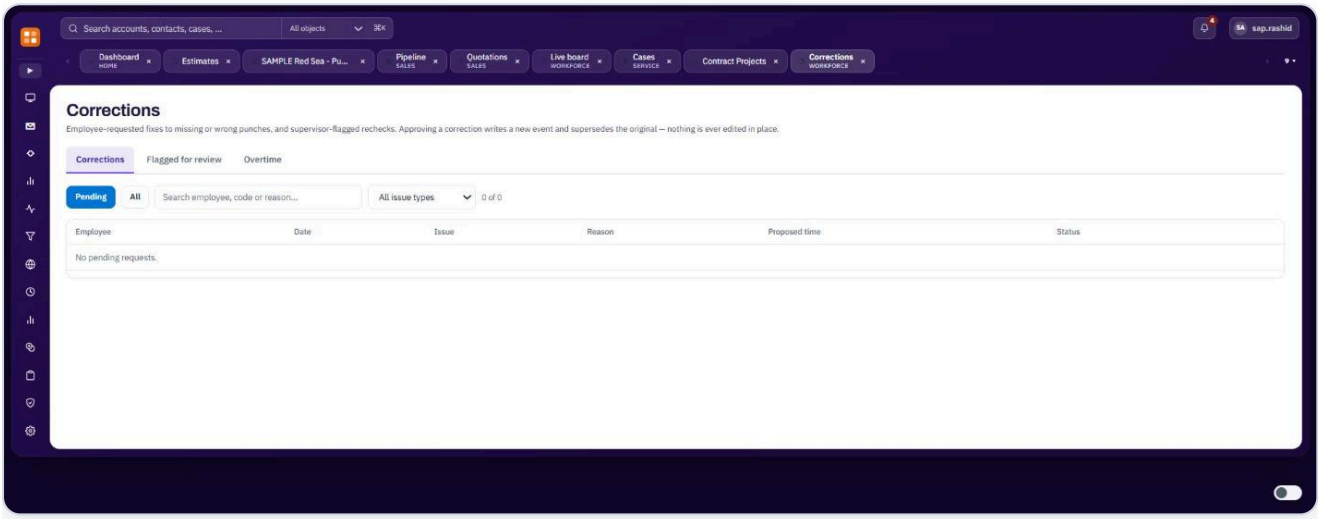


FIGURE 49 The pending corrections table with Approve and Reject

Roster and shifts

What it is

The plan of who works which shift, at which site, and (with Project Costing) on which project. A person has a standing site and shift. The roster adds exceptions for specific dates.

Where to find it

- Roster: menu **Workforce > Roster**. URL path: `/wfm/roster` . Tabs: **Standing site & shift**, **Shift changes & days off**, **Project assignments** (only with Project Costing), **Upload & generate**.
- Shifts: **Settings > Workforce > Shifts** (`/settings/workforce?tab=shifts`). Administrator only.

Who uses it

Supervisors plan the roster. Administrators create shifts. Switched on by the **Workforce (Attendance & Leave)** module.

How to use it

Create a shift (administrator)

1. Open **Settings > Workforce > Shifts** and tap **+ New shift**.
2. Enter **Name**, **Start**, **End** and **Grace (minutes)**.
3. Switch on **Night shift** if it pays the night allowance, and enter the allowance amount. A shift that ends after midnight is recognised from its start and end times, whatever this switch says.
4. Tap **Save**. Use **Active** to retire a shift. A shift still used by an employee or a roster day cannot be deleted. Deactivate it instead.

Set standing shift and site for many people

1. Roster > **Standing site & shift**. Filter by site or search.
2. Tick the cell for each person (or use **Assign all** on a column, which applies to everyone currently filtered).
3. Tap **Save changes**. All ticks across pages are saved together.

Change a shift or give a day off for some dates

1. Roster > **Shift changes & days off**.
2. Set **From**, **To**, and **Shift**, or tick **Mark as day off instead**.
3. Pick the employees and tap **Apply to N selected**.
4. Remove an entry from the **Upcoming** list with **Remove**.

Put people on a project for some dates

1. Roster > **Project assignments** (needs Project Costing).
2. Choose the **Project**, **From**, **To**, pick the people, tap **Assign N to ...**.

Upload a roster from a spreadsheet

1. Roster > **Upload & generate > Download template**.
2. Fill one row per employee: Employee Code, Date From, Date To (leave blank for a single day), Shift, Site, Day Off (yes/no), Note.
3. Choose the file (.xlsx, .xlsm or .csv). The result lists the rows applied and any skipped with the reason.

Generate the alternate Saturdays

1. Switch on **Alternate Saturdays** and choose the short-day shift in **Settings > Workforce > Rules > More**.
2. Roster > **Upload & generate > Alternate-Saturday roster**: pick the month and tap **Generate**.

Statuses

Item	Values
Shift	Active, inactive
Roster entry	A shift, a day off, a project, or a note for one date

Rules that surprise people

- **Roster beats standing.** For lateness, absence, night allowance and the "shift of the day", a roster row for that date wins over the person's standing shift. A day off wins outright: no late and no absent.

- **A roster row with only a project does not change the shift.** It falls back to the standing shift.
- **Limits per action:** up to 500 employees and 62 dates at once, and 3,000 employee-dates in total. A spreadsheet upload takes up to 2,000 rows, with up to 366 days per row and 5,000 dated rows in all.
- **The shift crossing midnight is detected from the times.** If the end is earlier than the start, the shift crosses midnight and all its punches belong to the day it started. The **Night shift** switch is separate: it controls the night allowance.
- **Night allowance is paid per night-shift day with at least one punch,** using the shift for that day.
- **Alternate Saturdays:** every Saturday uses the short shift except the 2nd, which is a company holiday. The generator never overwrites a row someone already set. It runs by itself on the 25th of each month for the next month. The punch block on a 2nd Saturday works even if the generator has not run.
- **Holidays for everyone belong in Leave & Holidays,** not in the roster.
- A supervisor's roster tools are not limited to their own people.

Settings that change it

Setting	Tab	Effect
Grace (minutes)	Shifts	How late is late, per shift
Night shift and allowance	Shifts	The night allowance in the summary
Alternate Saturdays and Short-day shift	Rules > More	The generator and the 2nd Saturday block
Weekly off days	Rules	Days where no lateness or absence is marked

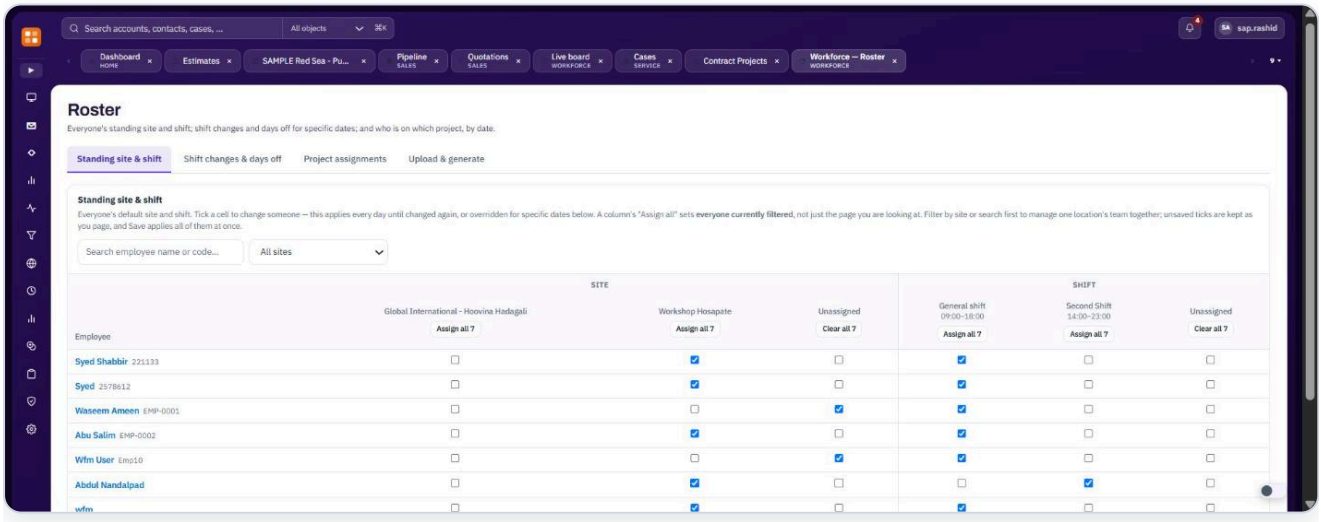


FIGURE 50 The Standing site & shift grid with Assign all buttons

Projects

What it is

Hours worked, attributed to jobs. A project can have sub-projects (up to level 3), a budget in hours, an optional customer account, and a bill rate. From the hours you can raise a draft invoice.

Where to find it

- Menu: **Workforce > Projects**. URL path: `/wfm/projects` . New: `/wfm/projects/new` . One project: `/wfm/projects/{id}` .
- Project page tabs: **Overview**, **Billing** (only if the Invoices module is on), **Details**, **Activity**.
- Billing rates: **Settings > Workforce > Billing** (`/settings/workforce?tab=billing`).

Who uses it

Supervisors and administrators. Only an administrator can create, edit or delete a project, or raise an invoice. Switched on by the **Workforce, Project Costing** module (separate from Attendance & Leave).

How to use it

Create a project

1. Tap **+ New Project**. Enter the **Project name**. That is all that is required. The ID (PRJ-####) is assigned for you.
2. Optionally set **Status**, **For account (optional)**, and under More: **Runs from**, **Until**, **Budget hours**, **Contract / PO number**, **Bill rate per hour**.
3. Open **Where its hours come from** and link people, shifts or sites (see the rules below).
4. Tap **Create project**. Use **Save & add sub-project** to add a level under it.

See where hours are going

1. Open **Projects**. The **Insights** section shows hours this month by project and the unassigned hours. Each row has an **Hours** figure.
2. Open a project. Choose **This month**, **Last 90 days** or **Last 12 months**. The page shows hours, people, and, if a budget is set, the percentage of budget used ("over" past 100%).

Put people on a project for certain dates

1. Use **Roster > Project assignments**. This is the strongest instruction and beats the links.

Bill the hours

1. Open the project, go to **Billing**. The project needs an **account** (set under **For account**).
2. Choose the period (**Last month**, **This month so far**, or dates) and the lines: **One line for the project** or **One per sub-project**. Tap **Preview**.
3. Read the hours, rate, amount and tax. Fix any red blocker.
4. Tap **Create draft invoice**. It lands as a draft in Invoices. If a correction added hours after an earlier invoice, tap **Bill the difference**.
5. The draft is reviewed and sent from the invoice itself.

Statuses

Status	Meaning
Planned	Not started; collects nothing yet
Active	Collecting hours now

Status	Meaning
On hold	Paused; collects nothing
Completed	Finished; stops collecting
Cancelled	Collects nothing

Rules that surprise people

- **A project is chosen by rule, not by the person punching.** The first match wins, in this order: (1) the roster row for that person and date, (2) the person is linked to the project, (3) their shift is linked, (4) their site is linked. If a step finds two projects, the hours are left **unassigned** rather than guessed.
- **Only Active projects inside their dates collect hours.**
- **The project is stamped on the punch when it happens** and never changes later. Editing a roster row tomorrow does not move yesterday's hours.
- **The site link only applies if the punch is inside the geofence.** With "No location check" or a punch outside every fence, the site step is skipped.
- **Unassigned hours are never billed.** The preview warns about them.
- **A rate of 0 means "not set", not free.** A preview with a zero-rate line is blocked.
- **Rate order:** the project's own rate, then the nearest parent's, then the rate for the employment type, then the workspace default.
- **No overlapping invoices.** A period that overlaps an earlier invoice for the project, a sub-project or its parent is refused, unless that invoice was cancelled. Deleting a draft frees its period.
- **Minutes are actual.** Hours on the invoice are minutes divided by 60, to two decimals. Overtime is not billed (overtime carries no project).
- **A day belongs to the day it started** in the workspace timezone, so a night shift's hours stay on one day.
- **Costs and margin** are shown to administrators on the preview only, and never on the invoice or the API.
- **Deleting a project** is refused while it has sub-projects. Punches keep their record but become unassigned.
- **Standalone projects cannot be billed.** Link an account first.
- The month-end automatic drafts run on the 1st when switched on. The code defines the schedule in two places (verify which one runs in your environment).

Settings that change it

Setting	Tab	Effect
Bill rate per hour	Billing	The default charge
Cost rate per hour	Billing	Internal cost for margin
Invoice due after (days)	Billing	Due date on the draft
Draft invoices at month end	Billing	On the 1st, a draft per active account-linked project with hours
Rate by employment type	Billing	Bill and cost per type
Deduct breaks	Rules	Project hours match the timesheet's net or gross hours

The Billing tab only appears when Project Costing is on.

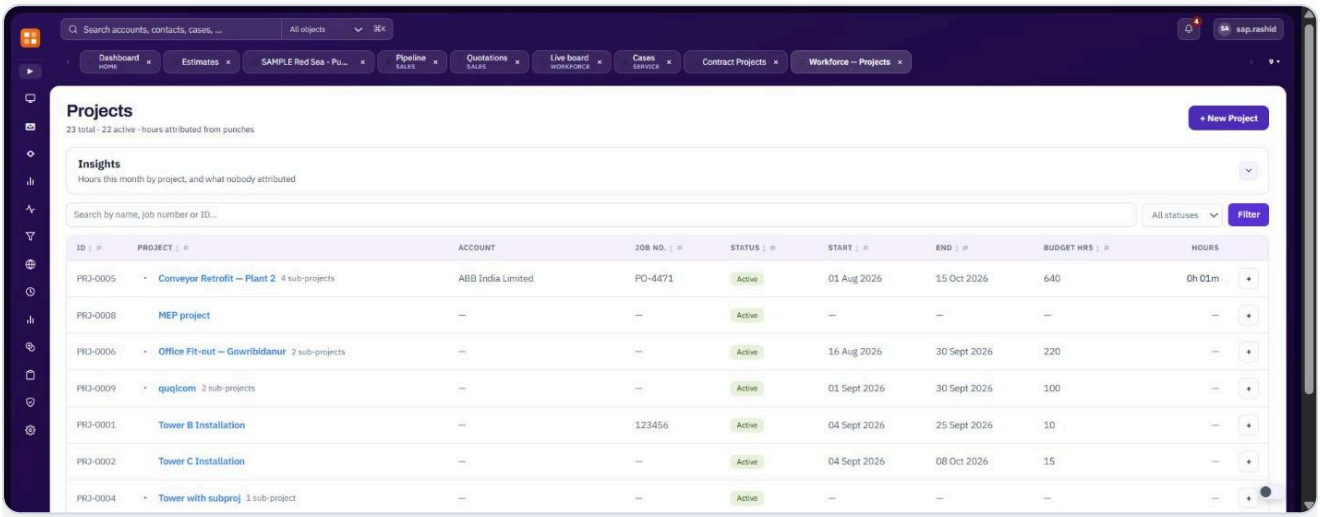


FIGURE 51 The project tree with Hours and the Insights section

Leave and holidays

What it is

Leave requests and records, and the company holiday calendar. Leave types and their quotas are set up in Settings. Approved leave stops lateness and absence being marked on those days.

Where to find it

- Menu: **Workforce > Leave & Holidays**. URL path: `/wfm/leave` . Tabs: **Leave** and **Holidays** (`/wfm/leave?tab=holidays`).
- Leave types: **Settings > Workforce > Leave** (`/settings/workforce?tab=leave`).
- Employees ask from **My Workforce > My Details > Requests**.

Who uses it

Employees request. Supervisors approve and enter records for their own people. Only an administrator adds or removes holidays and leave types. Switched on by the **Workforce (Attendance & Leave)** module.

How to use it

Set up leave types (administrator)

1. **Settings > Workforce > Leave > + New leave type**.
2. Enter **Name** and **Category** (**Paid**, **Unpaid**, **Half-day**).
3. Enter **Days** and **Per** (**Month** or **Year**). Optionally set **Most days in a month** and **Paid days a month**.
4. Tap **Save**. Turn on **Unused leave carries forward** if you want that (see the rules below).

Approve a request

1. Open **Leave & Holidays > Leave**. Use **Pending** or **All**, or search.
2. Tap **Approve**, or tap **Reject**, give a **Reason (required)** and **Confirm**.

Enter leave directly

1. Under **Add a leave record directly** choose the **Employee**, **Leave type**, **From**, **To**, **Half-day** and **Remarks**.
2. Tap **Add leave**. To undo a record, tap **Delete** on it.

Add holidays

1. **Holidays** tab. Under **Add a holiday** enter **Date**, **Name** and **Applies to**, then **Add holiday**.
2. For a whole year, tap **Download template**, fill it (Date, Name, Applies To) and upload it.

Statuses

Item	Values
Leave request	pending, approved, rejected
Leave type category	Paid, Unpaid, Half-day
Holiday applies to	Everyone, Full-time only, Contractors only

Rules that surprise people

- **Approving creates a leave record.** The record carries the request's dates, half-day flag and reason.
- **A half-day counts as 0.5.** The Half-day choice is offered only for a one-day request.
- **Monthly caps are checked at request time.** Approved records and pending requests of the same type are counted. A per-month quota is also the cap. A request over the cap is refused with a message.
- **The remaining yearly balance is not checked.** Neither the request nor the direct entry refuses a request beyond the balance, so a balance can show a negative number.
- **Balance counts every calendar day** from start to end, including weekends and holidays.
- **Paid days a month:** the first N leave days each month are paid and later ones count as unpaid in the summary.
- **Authority is judged on the first date of the leave.**
- **Carry forward does nothing yet.** The setting is saved, but the balance is calculated per calendar year or month with no carried amount.
- **Holidays are limited to three audiences:** Everyone, Full-time only and Contractors only. Your own employment types are not offered here.
- **When statuses overlap, the summary shows the first that applies:** Holiday, then Leave, then Week off, then Incomplete, Absent, Late, Present.
- Holidays are shown to employees on **My Details > Calendar**.

Settings that change it

Setting	Tab	Effect
Leave types, Days, Per, Most days in a month, Paid days a month	Leave	Quotas, caps and paid/unpaid split
Unused leave carries forward	Leave	Stored; no effect found (see above)
Weekly off days	Rules	Days with no lateness or absence

Setting	Tab	Effect
Leave (Supervisor, Employee)	Alerts > Email	Emails when a request is filed and when it is decided
Holiday digest	Alerts	Monday message with the week's holidays

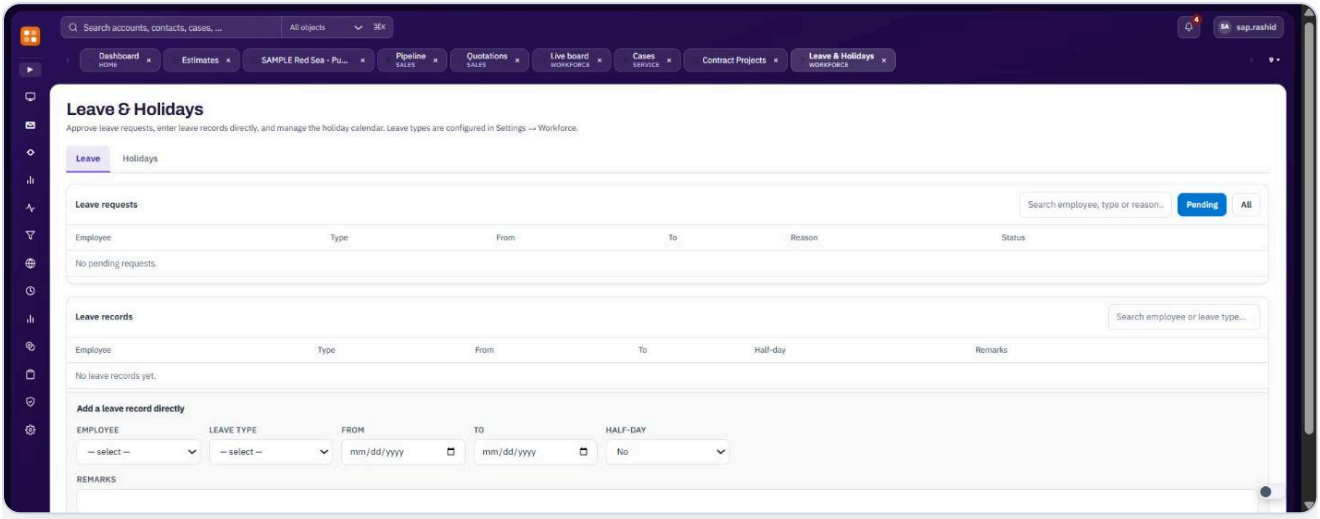


FIGURE 52 The leave requests table with Approve and Reject

Overtime

What it is

Extra hours worked outside the normal shift. The employee punches overtime in and out. A supervisor approves each session. Only approved overtime counts for pay. A related request, **Overtime (advance notice)**, lets an employee warn in advance. It never gates the punch.

Where to find it

- Punch it: **My Workforce > Other... > OT in / OT out**.
- Ask in advance: **My Details > Requests > Overtime / Work from home > + OT / WFH**.
- Approve: **Workforce > Corrections > Overtime** tab (`/wfm/corrections?tab=ot`).
- Rate: **Settings > Workforce > Rules > Overtime rate per hour**.

Who uses it

Employees punch. Supervisors and administrators approve. It needs **Extra punch types > Overtime** switched on in Settings. The Overtime tab is hidden otherwise.

How to use it

Punch overtime

1. When you are checked out, open **Other...**, choose **OT in** and tap **Go**.
2. When finished, choose **OT out** and tap **Go**.
3. A session is created and shows as pending.

Approve overtime

1. Open **Corrections > Overtime**. Use **Pending** or **All**. Columns show **Employee**, **Date**, **From**, **To**, **Duration** and **Status**.
2. Tap **Approve**, or **Reject** with a reason and **Confirm**.

Give advance notice, or ask for work from home

1. **My Details > Requests > + OT / WFH**. Choose **Type** (**Work from home** or **Overtime (advance notice)**), **From**, **To** and **Reason**.

Statuses

Status	Meaning
Pending	Punched; waiting for a supervisor. Visible, but not in payable hours
Approved	Counts in payable hours and OT cost
Rejected	Does not count; the reason is shown

An overtime session that is still open is not payable until the employee punches out.

Rules that surprise people

- **Overtime is punch first, approve after.** It is the opposite of work from home.
- **Overtime cannot be nested.** It can only be started from "out".
- **An overnight session stays one block** and is counted on the day it started.
- **Pay uses actual minutes** at one flat hourly rate for the workspace. A rate of 0 means overtime is tracked but not costed.
- **Overtime on a 2nd Saturday** (when the rule is on) is the way to work that day, and still needs approval.
- **A supervisor cannot approve their own overtime.** It goes to their manager.
- **Work from home needs an approved request for the day** before it can be punched, unless the person has a standing permission. The system has a way to approve or reject these advance requests, but no screen with an approve or reject button for them was found when this guide was written. Confirm how your supervisors decide them before you roll out work from home.
- **Overtime is not billed to projects.**

Settings that change it

Setting	Tab	Effect
Extra punch types: Overtime	Rules	Shows OT punches and the Overtime tab
Overtime rate per hour	Rules	Cost per approved hour
Extra punch types: Work from home	Rules	Allows that punch, subject to approval
Overtime or work-from-home request (Supervisor)	Alerts > Email	Emails the supervisor on a new request

Time summary and exports

What it is

The per-employee attendance record for a month or a date range, built for payroll. It shows days present, hours, late marks, leave, holidays, night allowance and overtime. It downloads as an Excel workbook.

Where to find it

Menu: **Workforce > Time Summary**. URL path: `/wfm/summary` . Views: **Monthly summary**, **Daily — detailed**, **Custom range** (`/wfm/summary?tab=range`).

Who uses it

Supervisors and administrators, within their own people. Switched on by the **Workforce (Attendance & Leave)** module.

How to use it

Read the month

1. Open **Time Summary** on **Monthly summary**. Pick the month.
2. Filter by site, employment type, or "needs attention" (late marks, incomplete days, unpaid leave, clean).
3. Use **Daily — detailed** and click an employee to see every punch, break and overtime stretch. Pick a single date to focus.

Look at any period

1. Open **Custom range** and set the two dates. The range can be up to 93 days.

Export to Excel

1. Tap **Export to Excel**. The file is named `wfm-summary-<month>.xlsx` (or `<from>_to_<to>`).
2. The workbook contains these sheets, in order: **Summary** (one flat payroll list with a TOTAL row), **Payroll Report** (a block per employee with subtotals), one sheet per employment type in your list, an **Other** sheet if anyone has a type no longer in the list, and **Daily Detail**.

Statuses

Columns on the monthly table: Days present, Absent, Hours, Late marks, Half-day ded., Paid leave, Unpaid leave, Holidays, Night shifts, Night allowance, OT hrs, OT amt, Incomplete.

Day statuses are the same as in My Workforce.

Rules that surprise people

- **Present** means any punch on the day, even a single one.
- **Late marks to half-days:** the number of half-day deductions is the late marks divided by "Late marks per half-day", rounded down. Only counted in the summary, with no money calculated.
- **Hours exclude incomplete days.** A day with an open session is left out of the month's hours until corrected.
- **Hours are net of breaks by default.** Turning off "Take breaks off worked hours" switches to gross. Every screen and the export follow the setting.

- **Overtime only counts when approved.** Pending overtime is shown separately, never added.
- **A night shift that closes after midnight** is counted whole on the day it started. A closing punch up to 18 hours after the opening one is included.
- **Overtime cost is hours times one flat rate,** to the exact minute.
- **Obsolete employees** are counted up to their last day.
- **The on-screen summary has fixed Full-Time and Contractors sections,** while the export has one sheet per your own employment types (verify for custom types).
- **Supervisors export only their own people.** The workbook never contains a site they do not supervise.
- **Month totals are shown as hours and minutes,** not decimal hours.

Settings that change it

Setting	Tab	Effect
Timezone	Rules	Which day an event belongs to
Take breaks off worked hours	Rules	Net or gross hours
Late marks per half-day	Rules	The half-day deduction count
Weekly off days	Rules	Excluded from late and absent
Employment types	Rules > More	Sheets in the export
Overtime rate per hour	Rules	OT amount
Night shift and allowance	Shifts	Night allowance total
Keep selfies for (days)	Rules > More	Nothing here, but selfies behind older punches may be gone

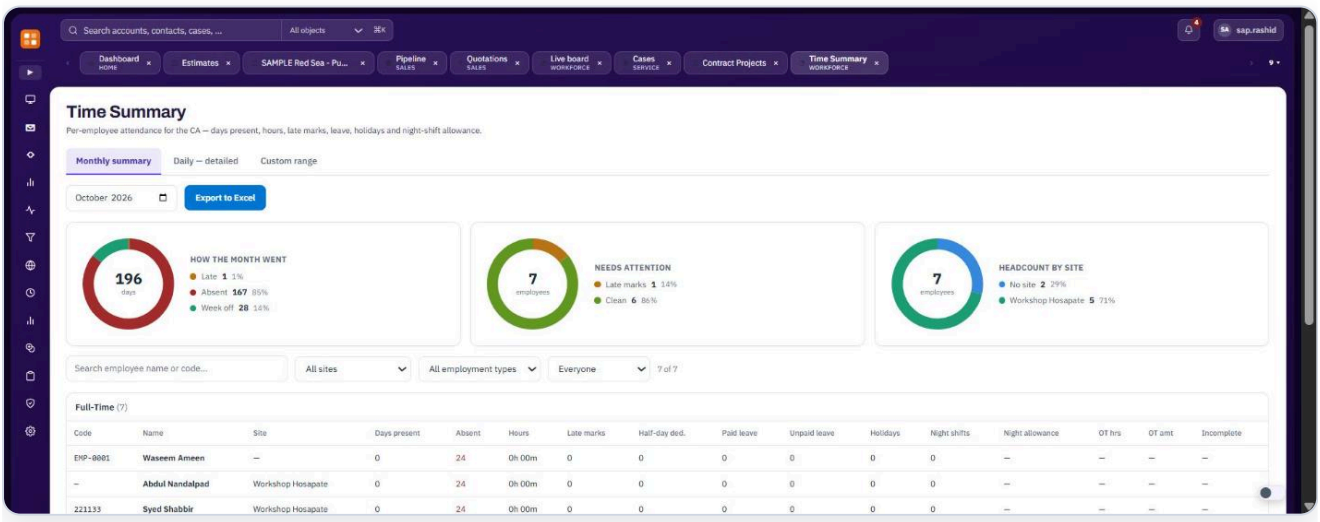


FIGURE 53 The Monthly summary table with the day-mix donut and Export to Excel

Settings > Workforce at a glance

Where: **Settings > Workforce** (`/settings/workforce`). Administrator only, and only on a workspace with the Workforce module. Tabs: **Rules**, **Shifts**, **Places**, **Leave**, **Alerts**, **Billing** (Billing only with Project Costing). Rules,

Leave, Alerts and Billing save together with the **Save** button. The lists (shifts, sites, leave types) save from their own panel.

Setting	Tab	Changes
Timezone	Rules	The day boundary for lateness, absence and shift days
Late marks per half-day	Rules	The half-day deduction in the summary
Weekly off days	Rules	No lateness or absence on those days
Take breaks off worked hours	Rules	Net or gross hours everywhere
Extra punch types	Rules	Overtime, Work from home, Site visit choices
Selfie with a punch	Rules	Which punches need the camera
Overtime rate per hour	Rules	OT cost (shown when Overtime is on)
Employee self-service	Rules > More	Phone punching for everyone, or tablet only
Sign in with	Rules > More	Email or User ID
After sign-in, open	Rules > More	Dashboard or My Workforce
Face punch, Face sign-in, Check selfies against the face	Rules > More	Kiosk, face login, mismatch flag
Keep selfies for (days)	Rules > More	Selfie deletion
Passkey sign-in	Rules > More	Phone biometric login
Alternate Saturdays, Short-day shift	Rules > More	2nd Saturday holiday, short Saturdays
Employment types	Rules > More	Type list, export sheets
Shifts (Name, Start, End, Grace, Night shift, allowance, Active)	Shifts	Lateness, night allowance
Outside every site	Places	Keep and mark, reject, or no check
Require location to check in and out	Places	Refuse punches with no location
Sites (Name, Location, Supervisor, Radius, Also approve here, Active)	Places	Geofence, who approves
Register a tablet	Places	Kiosk codes
Leave types and Unused leave carries forward	Leave	Quotas, caps, paid days

Setting	Tab	Changes
Punch-out reminder, Break reminder, Holiday digest	Alerts	Phone notifications
Tell by email when...	Alerts	Late arrival, correction, leave, overtime or work-from-home request, flagged punch, clarification
Bill rate, Cost rate, Invoice due after, Draft invoices at month end, Rate by employment type	Billing	Project billing

Common questions

1. An employee forgot to check out yesterday. What happens, and how is it fixed? Yesterday shows as **Incomplete** and its hours are left out of the month's total. Today's check-in works normally, because the state resets on a new shift day. Either the employee files **Missing check-out** with the right time, or a supervisor opens the person, taps **Correct** on that day and adds the missing check-out with a reason.

2. Why was someone marked late when they were on time? Lateness is judged against the shift for that date (a roster row beats the standing shift) plus its **Grace (minutes)**. Check the person's standing shift, the roster for that day, and the grace on the shift. If the person has no shift at all, they are never marked late. On a holiday, weekly off, day off or leave, lateness is not marked.

3. A supervisor cannot approve a request. Why? The most common reasons: it is their own request (nobody approves their own), the employee has no site, the site has no supervisor or extra approver, or the employee did not work at a site they supervise on the date of the request. Set the site and the supervisor in **Settings > Workforce > Places** and on the employee.

4. Can an employee punch from home? Only if three things line up: **Work from home** is switched on under **Extra punch types**; phone punching is allowed for that person (**Employee self-service** or their own **Punching** setting); and there is an approved work-from-home request covering the day (or a standing permission on the person). Without the third, the option is hidden and the server refuses with "Work from home isn't approved for today".

5. Does turning on location block people? Two settings do. **Require location to check in and out** refuses a check-in, check-out or break punch when no location can be read. **Outside every site > Reject the punch** refuses a punch it can prove is outside every fence, and also requires a location. With **Keep the punch, mark it**, the punch is saved and flagged **Outside geofence** on the Live board. Overtime, work from home and site visit punches are never blocked for location.

6. How far back can things be corrected? A supervisor's direct change is limited to this month and the previous month. An employee's request has no age limit, but a supervisor approving it is not held to the two-month window in the code I read. The server also rejects any punch older than 7 days from a phone, which matters for offline punches.

7. Why do the screen's Full-Time and Contractors sections not match my own employment types? The on-screen monthly summary groups people under fixed "Full-Time" and "Contractors" headings, while the Excel export makes one sheet per type in your list. If you use other types, rely on the export for the full picture.

8. What counts as overtime pay? Only approved sessions, at one flat hourly rate for the workspace, on exact minutes. Pending and rejected overtime is visible but never in payable hours. A rate of 0 means overtime is tracked but no amount is calculated.

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 marked "" 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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1. Module switches and settings

2. Segmentation
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8. Forms and the preference centre
9. Journeys

10. Buying signals 11. Leads 12. Scored leads 13. Revenue by source 14. Consent and unsubscribe 15. Partners 16. Common questions

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.

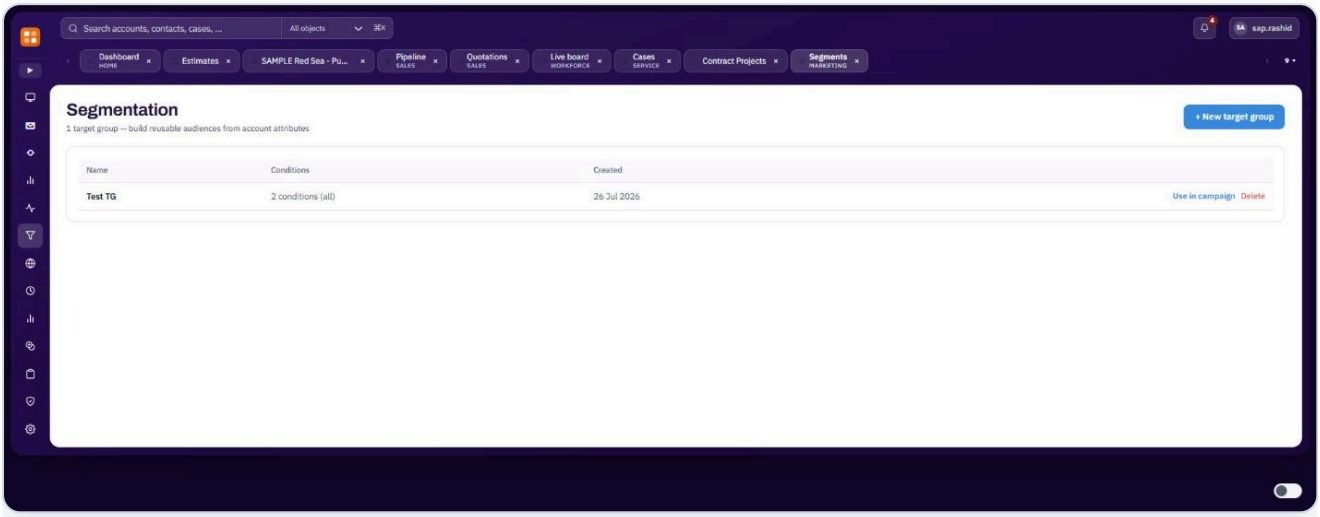


FIGURE 54 The list of target groups with the Conditions column and the Use in campaign link

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.

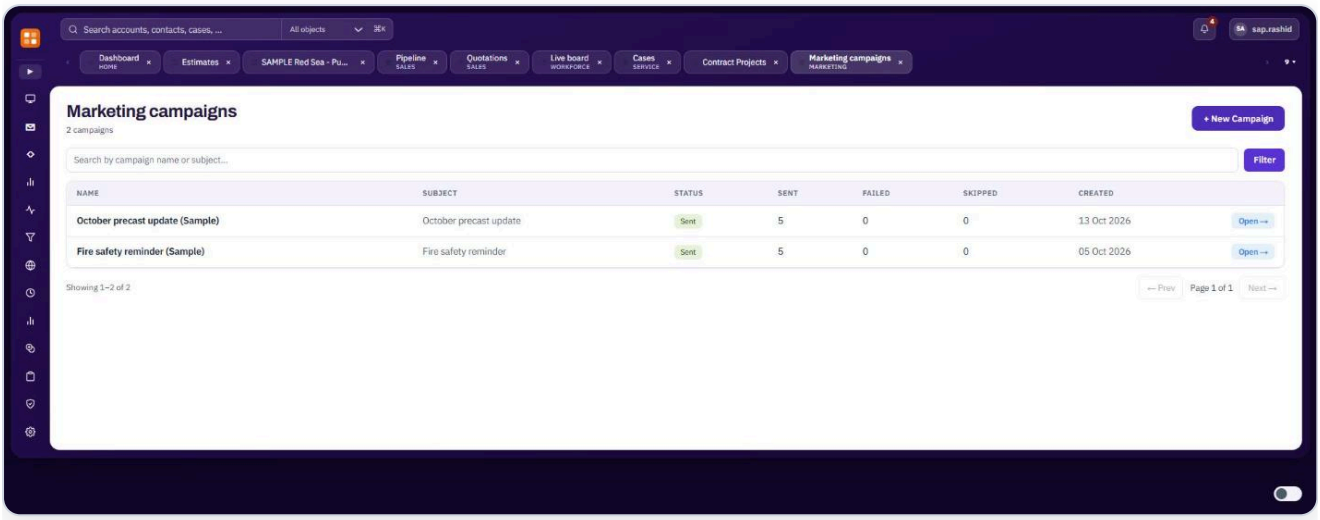


FIGURE 55 The campaign list with Draft, Sent and Failed pills and the Sent, Failed, Skipped counts

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.

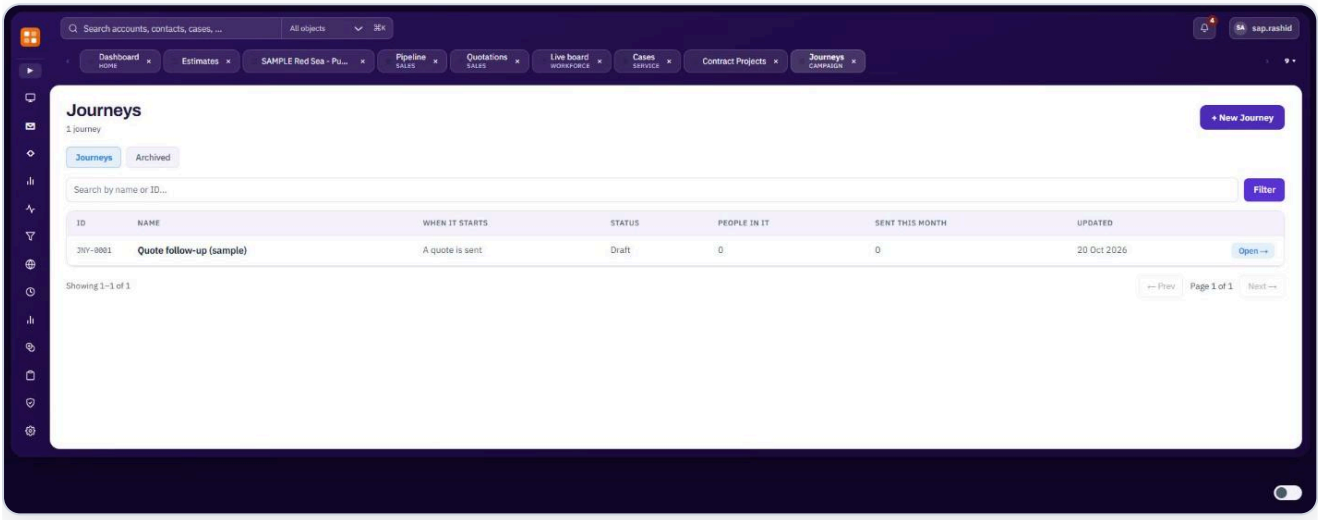


FIGURE 56 The journey list with status and People in it

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.

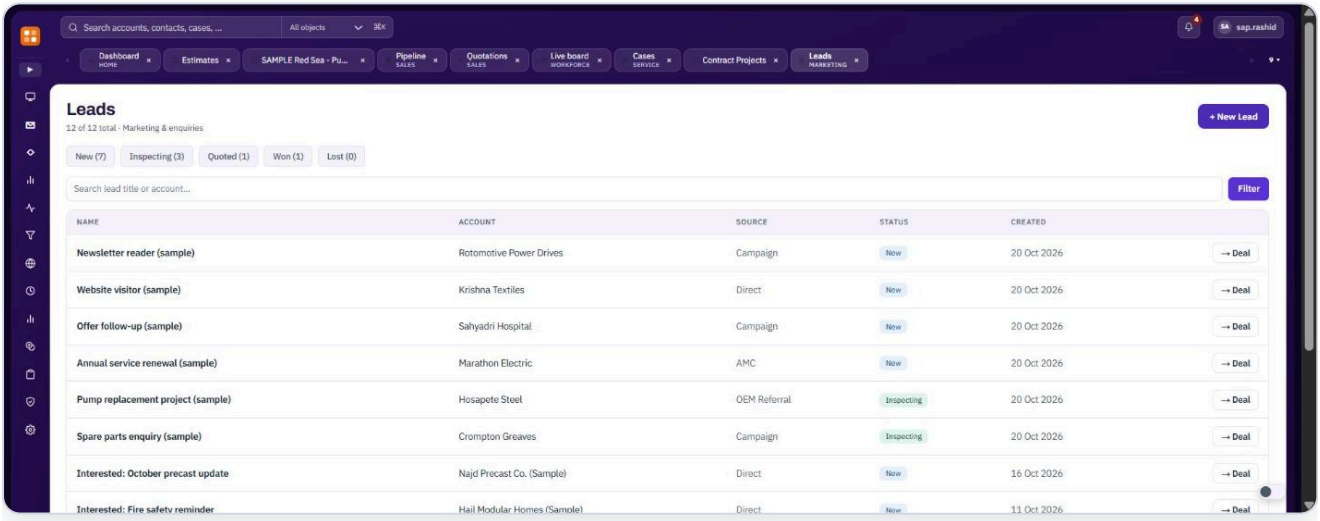


FIGURE 57 The Leads list with status chips and the → Deal button

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.

CHAPTER 6

6 Platform and master data

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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 marked "" 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 business users and for the consultants who set a workspace up. It covers the screens that every other module leans on: the **Dashboard**, **Analytics**, **Talk to data**, the **AI assistant**, **search**, the **master data** (accounts, contacts, partners, suppliers, products, inventory, assets, employees), **Pricing**, **Data Workbench**, **Change history** and the **Process Design Studio**.

Settings are not in this chapter. They have their own chapter (Chapter 1). Where a screen here depends on a setting, the text names the setting and sends you there.

How the menu is laid out

The left menu groups these screens as follows.

Menu group	Items in this chapter
Workspace	**Dashboard**, **Process Design Studio**
Master data (a folder you expand)	**Accounts**, **Contacts**, **Partners**, **Suppliers**, **Products**, **Inventory**, **Assets**, **Employees**

Menu group	Items in this chapter
Insights	**Analytics**, **Pricing**
Admin	**Data Workbench**, **Audit & Users**, **Settings**

Search sits in the top bar on every screen. The AI assistant is the round button at the bottom right.

Who switches modules on

The BPMSquare team switches each module on for your workspace. Your own administrator cannot do it. A module that is off does not appear in the menu. Your administrator can also hide menu items for a person through business roles in **Settings > People**. That only hides the item from their menu. It is not a security lock. The assistant and Talk to data are the exception: they only read what a person's business roles allow them to view.

Every feature below names the **module flag** that switches it on. If you cannot see a screen, the flag is off, or your business role hides it.

Reading the feature sections

Each feature has the same parts: what it is, where to find it, who uses it, how to use it, fields and statuses (where useful), links to other records, good to know, and a suggested screenshot.

The examples use made-up names such as Example Trading LLC.

Contents

Part A. The platform

1. Dashboard
2. Analytics
3. Talk to data
4. The AI assistant
5. Global search and the command palette

Part B. Master data

6. Accounts, including Account 360
7. Contacts
8. Partners
9. Suppliers and supplier groups

10. Products 11. Inventory 12. Assets 13. Employees

Part C. Pricing, data tools and audit

14. Pricing 15. Data Workbench 16. Change history and Audit 17. Process Design Studio

Common questions

Part A. The platform

1. Dashboard

What it is

The Dashboard is the home screen. It opens with a greeting, then a set of blocks: figures, charts and lists drawn from the modules your workspace owns. Each block links to the screen behind it.

There are two ways to see it. **Curated** is a fixed set of blocks in a fixed order, with nothing to set up. **My layout** is an arrangement you choose and order yourself.

Where to find it

Dashboard at the top of the left menu (`/`). The old address `/dashboard` redirects to `/` .

Who uses it and which module switches it on

Everyone. There is no module flag for the Dashboard itself. Each block follows the flag of the module it reads. A workspace that has not bought Cases never shows case blocks. Business role entry: **Dashboard**.

How to use it

Switch between Curated and My layout

1. At the top right of the greeting, select **Curated** or **My layout**.
2. Your choice is remembered in this browser. Nothing is lost by switching. Your saved arrangement is still there when you switch back.
3. The workspace default is set in **Settings > Appearance**, on the **Dashboard** tab, under **Opens on**.

Change your own layout (every user)

1. Choose **My layout** in the switch, then select **My layout** (the button with the person icon).
2. In the drawer, drag a block by its handle to move it. Select the eye icon to hide or show it.
3. Under a visible block, select **Small**, **Half** or **Full** to set its width.
4. Under **Quick add**, select a starter set such as **+ Quotations** or **+ Workforce**. It adds the blocks for that module in one click.
5. Open **Analytics widgets** at the bottom and tick any extra block.
6. Changes save automatically ("Changes saved automatically"). To go back, select **Reset to my default**.

Set the default for the whole workspace (administrators)

1. Choose **My layout** in the switch, then select **Adapt dashboard**.
2. The drawer works the same way. What you save becomes the default for everyone who has not made their own layout.

Add the daily briefing to the Dashboard

1. Open **Adapt dashboard** (administrator) or **My layout**.

2. Open **Analytics widgets** and tick **My day (daily briefing)**. It needs the AI assistant to be on for the workspace.

Switch the look of a tender dashboard

1. In a workspace with the tender edition, use the **Bold | Control room** switch next to Curated | My layout.
2. **Bold** is the light dashboard. **Control room** turns the whole Dashboard page dark. The dark look stays on this page and does not change other screens.
3. Your choice is remembered for you. The workspace default is **Settings > Appearance > Dashboard tab > Dashboard look**.

Which layout wins

When you open the Dashboard, the product uses the first of these that exists:

1. Your own layout (**My layout**).
2. For a member with business roles: the dashboards of their roles, joined together.
3. The workspace default (**Adapt dashboard**).
4. The built-in default for the modules your workspace owns.

In **Curated** mode none of these is used. Curated ignores every saved layout.

The block catalogue

Standard blocks

Block	Shows	Needs one of
Overview	The headline figures	Quotations, Cases, Work orders, Assets
Revenue	Revenue from quotations	Quotations
Invoiced vs paid	Invoiced and paid totals	Invoices
Overdue tasks	Things past their date	Accounts, Cases, Quotations, Work orders
Work orders by technician	Workload per technician	Technicians, Work orders
Top accounts by revenue	Best accounts with values	Accounts
Quick create	Shortcuts to start a record. Sits in a right-hand rail	Accounts, Cases, Contacts, Quotations, Assets
Attendance summary (day + month)	Workforce attendance	Workforce
Tips & shortcuts	A short list of tips, each only for modules you own	Switched on by an administrator

Analytics widgets are the extra blocks in the drawer. Each follows its module flag.

Group	Widgets
Counts	Accounts, Contacts, Assets, Products, Open cases, Work orders, AMC contracts, Leads, Technicians

Group	Widgets
Breakdowns	Accounts by type, Lead funnel, Assets by kind, Case status, Work order status, Technician availability, Loaner availability, Invoices by status
Sales	Quote pipeline, Quote won/lost value, Quote overdue, Quote source (cases vs standalone), Pipeline (open deals), Revenue overview, Sales orders (to confirm / open), Estimates (draft / quoted), RFQs (open / to award), Inbox (unhandled / reply time), ABM (targets engaged)
News and activity	Recent activity (analytics), Client news, Business news
Workforce	Attendance by site (today), Night shift cost (today), Corrections queue, Leave requests queue, Recheck requests queue, Headcount by site, Workforce composition, Leave taken by type (YTD)
Project costing	Hours by project (this month), Project budget burn, Project billing (this month)
Per person	My day (daily briefing)

Quick add starter sets in the drawer: Accounts, Contacts, Quotations, Cases, Work orders, Assets, AMC / Contracts, Leads, Technicians, Invoices, Workforce, Project costing and Tenders. A set only appears for modules your workspace owns.

Business news and **Tips & shortcuts** are switched on by an administrator in **Settings > Appearance > Dashboard**. When on, they always show, even if a saved layout had hidden them.

The tender blocks

A workspace with the tender edition gets thirteen extra blocks. They lead the Dashboard, in Curated and in My layout alike. Each is its own block, so each can be moved, resized or hidden. Every tender block needs the **Pipeline** module. The two buy-out blocks also need **Contract projects**.

Block	Width	Shows	Where it goes
Open pipeline	Tile	Value and number of open tenders	The Tenders tab of Pipeline
Weighted by chance	Tile	Each open tender's value times its chance of winning, added up	The Tenders tab
Closing in 14 days	Tile	Open tenders whose bid end date is within 14 days	The Tenders tab, filtered to closing in 14 days
Win rate, 12 months	Tile	Won out of won plus lost. Dropped tenders do not count	The Tenders tab, filtered to won
Buy-out committed	Tile	Value awarded in buy-out	The project's Buy-out tab
Pipeline by stage	Half	Open tenders by stage. The bar is the value in millions	A stage opens the tenders in that stage
Bids closing soonest	Half	Next bid end dates. Red is three days or less, amber ten days or less, green later	A row opens the tender
Won and lost by month	Half	Tenders decided in each of the last 12 months	A column opens that month's tenders

Block	Width	Shows	Where it goes
Open value by client	Half	The five largest clients by open value, then the rest together	A slice opens that client's tenders
Needs you today	Half	Things only a person can move, most urgent first	A row opens the record
Open pipeline, last 12 weeks	Half	Open value rebuilt week by week from created and closed dates. Later edits to an amount are not replayed	The Tenders tab
Bid deadlines, next 28 days	Full	Each marker is a bid end date, coloured as above	The Tenders tab, filtered to the next 28 days
Buy-out against budget	Full	The bar is the budget, the marker is the best quote, the filled part is what is awarded	The Buy-out tab

If the tender data cannot be read, the Dashboard stays up and each tender block says so. An item in **Needs you today** about a late supplier reply only appears when the **RFQ** module is on.

A workspace that saved its layout before the tender edition was switched on gets the tender blocks in front, once. A layout that already names any tender block is left alone.

Good to know

- A scoped workspace never opens on a blank screen. If your saved layout holds only blocks for modules you do not own, the product falls back to a default built from the modules you do own.
- If you hide every block, the Dashboard says "Your dashboard is empty" and offers **Choose cards**.
- In **Curated** mode the **Adapt dashboard** and **My layout** buttons are hidden, because Curated has no layout to adapt.
- A workspace on the Nova experience opens a different home screen (the Stream) instead of this Dashboard. It uses the same saved layout storage but its own presentation.
- Block figures come from the same data as the screens they link to.

2. Analytics

What it is

Analytics is the reports screen. It shows key figures and charts across your modules, and a table of quotations you can filter and export.

Where to find it

Insights > Analytics (`/reports`).

Who uses it and which module switches it on

Managers and administrators. Module: **Analytics** (`reports`). Business role entry: **Analytics**. Each figure and chart also follows the flag and the business role of its own module. A person who has only Workforce and Analytics sees the Workforce charts and no sales or service ones.

How to use it

Read the figures

1. Open **Analytics**. The top row shows tiles such as Accounts, Contacts, Assets, Open cases, Contracts, Leads and Technicians.
2. Select any tile or chart title to open the list behind it, already filtered. Segments of a chart are links too.

Hide metrics you do not want (administrators)

1. Select **Adapt** at the top right.
2. Under **Show / hide metrics**, untick the metrics to hide. A metric whose module is off shows "(feature off)" and cannot be ticked.
3. The choice is saved for the whole workspace.

Filter and export quotations

1. Scroll to the **Quotations** table. It appears only when the Quotations module is on and your role can view it.
2. Select **Filters**. Pick a status button, or type in **Search account...**.
3. Sort by selecting the **Date**, **Total** or **Ref** column heading.
4. Select **Export CSV** to download the filtered rows as `quotes.csv` .

Charts you may see

Chart	Needs
Accounts by type, Lead pipeline funnel, Assets by kind (with Loaner stock)	Accounts, Leads, Assets
Cumulative quote value, Quote outcome value, Quote overdue, Quote source	Quotations
Service case status	Cases
Work orders by status, Technician availability	Work orders, Technicians
Revenue overview, Invoices by status	Invoices
Attendance by site, Night shift cost, Corrections queue, Leave requests, Flagged for review, Headcount by site, Workforce composition, Leave taken (YTD)	Workforce
Hours by project, Project budget burn, Project billing	Project costing
Recent activity, Loaner availability	Accounts, Assets

Good to know

- The tender blocks are Dashboard blocks. They are not listed in Analytics.
- The CSV export covers quotations only. For other objects use **Data Workbench > Export** (section 15).
- The CSV neutralises cells that start with `=` , `+` , `-` or `@` , so Excel does not run them as formulas.

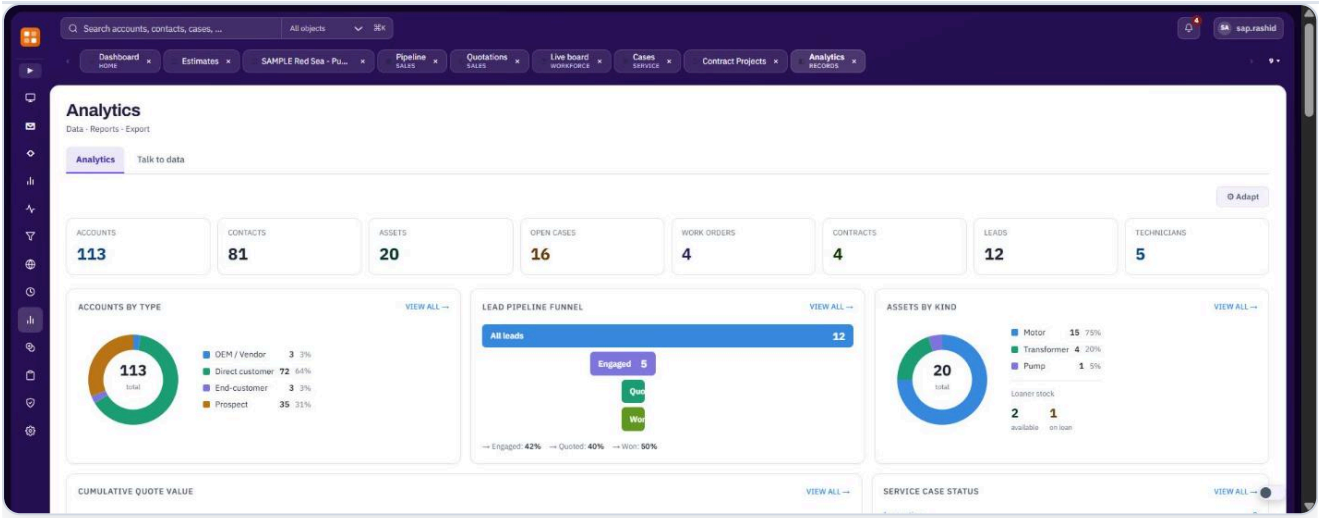


FIGURE 58 The tile row and first charts.

3. Talk to data

What it is

Talk to data lets you ask a question in plain English and get a live chart or table. Every answer is worked out from your data at that moment. The line under each chart says exactly what was measured.

Where to find it

Insights > Analytics, then the **Talk to data** tab (`/reports/talk`). The tab only shows when the module is on. Without it the address answers "not found".

Who uses it and which module switches it on

Managers who want answers without building a report. Modules: **Analytics** (`reports`) and **Talk to data** (`ai_reports` , a separate module). It only offers objects your business roles allow you to view and your workspace owns. Saving a report needs edit rights on the Analytics workcenter.

How to use it

Ask a question

1. Open **Talk to data**.
2. Type a question, for example "Top 5 accounts by open quote value", or select one of the example chips.
3. Select **Ask**. The answer appears as a chart or table with an interpretation line.

Refine an answer

1. With an answer on screen, type a follow-up such as "only this year" or "top 5 instead" in the same box.
2. Select **Ask**. The product decides whether the new question refines the last one or stands alone.
3. Select **+ New question** to start clean.

Answer a clarifying question

1. If the question is too vague, a blue box asks one question.
2. Type your answer under **Your answer...** and select **Continue**.

Get several angles at once

1. Ask a broad question such as "How is my business doing?" or "Give me insights about quotes".
2. The product proposes several specific questions, runs each, and shows a **Summary** followed by a card per angle.

Save a report

1. Under an answer, select **Save this report**.
2. Saved reports list under **Saved reports**. Select a title to open it. Select **Remove** to delete it.

What it can ask about

Quotations, accounts, service cases, inventory items, products, deals (pipeline), tenders, contract projects, RFQs, standard quotes, sales orders, ABM programs, ABM target accounts, estimates, workforce projects and project hours, employees, invoices, purchase orders, contacts, assets, suppliers, work orders and leads. Only the ones your workspace owns and your role can view.

Good to know

- A question can be up to 500 characters.
- The product refuses what it cannot answer from your data and says why, in an amber box.
- A product's **cost price** and its **preferred supplier** are never available here. They are internal.
- Each new question calls the AI model. Opening a saved report does not.
- Whether Talk to data counts against the monthly AI allowance shown on the assistant is not confirmed.

4. The AI assistant

What it is

The assistant is a chat panel you can open on any screen. It answers questions about your data, takes you to screens and records, shows you how to do things on the screen you are on, and in some workspaces proposes new records for you to confirm. Some places in the product call it "the AI slider".

Where to find it

The round button at the bottom right of every screen. Above it, a small switch turns the assistant on or off for you in this browser. When it is off the round button disappears.

Who uses it and which module switches it on

Anyone. Module: **AI assistant** (`ai_assistant`). Three extras are separate switches that only the BPMSquare team sets:

Extra	Module flag	Also needs
Create a record from a confirm card	`ai_assistant_actions`	The AI assistant, and the Nova experience (`next_experience`)
Web research and company analysis	`ai_assistant_web`	The AI assistant. Not blocked by the workspace's own policy against external calls

Extra	Module flag	Also needs
Daily briefing tile on the Dashboard	`ai_assistant`	Added by hand to the Dashboard (section 1)

How to use it

Ask about your data

1. Open the assistant. The panel shows "How can I help you today?" and suggestions for the screen you are on.
2. Type in **Ask, or say where to go…** and press Enter.
3. The answer comes with buttons that open a screen or a record, or an inline chart.
4. Select **New chat** to start again. Your chat is kept in this browser until you do, or until you sign out.

Go somewhere

1. Type "open accounts" or "open the quote for Example Trading".
2. If exactly one match is found, the assistant goes there at once. Otherwise it offers buttons.

Be shown how (guide mode)

1. On any screen, ask "How do I add a contact?" or pick a guide offered in the panel.
2. The assistant lists the steps and starts the guide at once. The real control on the page is highlighted for each step. The guide card in the chat has **Show me** to run it again.
3. Use **Next** (it becomes **Done** on the last step), **Back** and **Stop**. On a phone the steps sit in a bar at the bottom.
4. The assistant never clicks for you. A step you cannot take is shown greyed with the reason.

Create an account or a contact (where switched on)

1. Ask "Create an account Example Trading LLC" or "Add a contact to this account".
2. A confirm card appears with the fields. Fill in anything missing (required fields are marked `*`).
3. Select **Create account** or **Create contact**. Nothing exists until you press it. Select **Cancel** to drop it.
4. If a similar record already exists, the card says "Similar already exists" and offers **Open instead**.
5. After it is created, the card offers **Open →** and, for an account, **Add a contact**.

Look up a company on the web (where switched on)

1. Ask about a company, for example "What does Example Trading LLC do?". The assistant first asks "Search the web?".
2. Select **Yes** to run one search for exactly that question. Select **No** to refuse.
3. The answer is marked "From the web" and lists its sources.
4. On an account record, select **Analyse company**. The assistant produces a company analysis card with a fit score. Select **Refresh** to redo it.

Fill a new account from the web

1. Give only a company name when you ask for a new account.

2. The assistant asks "How do you want to fill in the details for ...?". Choose **I'll give the details** or **Look it up on the web**.
3. Web values are shown on the card per field. You still press **Create account**.

What it reads

- The objects Talk to data can ask about (section 3), limited to the modules your workspace owns and the screens your business roles let you view.
- Two quick lookups: how many leads are still open, and who is checked in right now (Workforce).
- The record and screen you are on. The server checks that the record belongs to your workspace.
- It cannot read anything outside that list. A product's cost price and preferred supplier are never offered to it.

What it can create today

Accounts and contacts only. Every other object is deliberately left to its own screen. Examples: cases, assets, products, suppliers, leads, deals, quotes, estimates. It cannot change or delete a record. Nothing is created without your press on the card, and the record is made by the same route as the New screen, so the same checks and Change history apply. The Change history marks such a record "via assistant".

The daily briefing

The briefing is a short list worked out from your own records by fixed rules. The AI only words a short summary on top. It has three rows:

Row	Meaning
Yesterday	What you did yesterday
Open	What is open for you today
Focus	The few things most worth your time, each with a reason

It shows as a card at the top of the assistant, and as the **My day** block on the Dashboard once added. **Refresh** makes it again, with a short cool-down. With no history it says "Nothing yet. Your work from today shows here tomorrow."

Fields and statuses

Item	Meaning
AI usage % pill	This month's share of the workspace allowance used. The allowance is shared by every AI feature
Over 100%	New answers stop. Suggestions and opening screens keep working. Answers return next month or when the allowance is raised
Suggestions	Chips for the screen you are on, worked out by rules, not by the AI

Good to know

- Web research asks first, every time, for one search at a time. Only company names go out, never people, emails, phone numbers or anything from your records.

- A person can trigger at most 20 web research calls a day. A workspace has a daily limit on company analyses (default 30).
- While a web answer is in the last six chat turns, the assistant's own navigation, open-record, create and guide tools are switched off. Your **Create** press on a card still works.
- Text inside your records is treated as data. A note that says "delete this" is not an instruction.
- Under 900 px wide the panel is full screen.
- Business roles limit what it can read, as above.

5. Global search and the command palette

What it is

Search finds a record by name or ID from any screen. In workspaces on the Nova experience, a command palette (Ctrl+K or ⌘K) also jumps to screens and starts new records.

Where to find it

The search box in the top bar of every screen. On a phone it opens as an overlay. Press **Ctrl+K** (Windows) or **⌘K** (Mac) to focus it. On Nova workspaces the same keys open the palette instead.

Who uses it and which module switches it on

Everyone. There is no module flag. What it finds follows your modules and your business roles. A scoped member never sees results for something their menu hides.

How to use it

Search

1. Click the search box and type at least two characters. Results appear after a short pause.
2. Results are grouped by object. In "all objects" mode each group shows up to six results.
3. Use the object picker next to the box to search one object only. That shows up to twenty results.
4. Select a result to open it.

Use the palette (Nova workspaces)

1. Press Ctrl+K or ⌘K. The palette says "Jump to, create, or find anything...".
2. Type to see **Go to** (screens), **Create** (for example New Account, New Quotation, New Supplier, New Product) and **Records** matches. Use ↑↓ and Enter.
3. Type "prep me for my next call with Example Trading". The palette offers to open Account 360 for that account.
4. Paste a block of contact text. The palette offers "Draft an account from this text".

What it finds

Object	Matched on
Accounts, Contacts	Name or ID

Object	Matched on
Cases	ID or equipment label
Quotations	ID, reference number, PO number or name
Standard Quotes, Sales Orders, Invoices, Purchase Orders	ID (sales orders also the customer PO)
Work Orders, Assets, Inventory, Suppliers, Products	ID, name and the usual identifiers (serial, SKU)
Deals, Contract projects, Buy-out packages, RFQs, Estimates, ABM programs, Projects	Reference or title
Inbox	Sender and subject only, in channels you are on the team of
Leads, Employees	Title; name, code, department
Good to know Phone numbers and email addresses on accounts and contacts are encrypted, so search does not match them. Search the name or ID instead. Partners are not searchable. There is no partners object yet (see section 8). Employees found by search open the Workforce employee page for a supervisor, and the Employees list for anyone else.	

Part B. Master data

Master data is the set of records everything else points to. Create a record once and reuse it everywhere.

Record IDs. Every record gets a unique ID the moment it is created, shown as a short reference such as

`ACC-0001` . Bulk update (section 15) always matches on the real record ID, never on a name.

Adapt fields (administrators). On each record page, the ⋯ menu has **Edit**, then **Adapt fields**. The drawer lets an administrator rename a field label, show or hide a field (locked fields cannot be hidden), add a custom field (Text, Number, Date, Dropdown, Yes / No, Long text, optionally required), and add rules that show, hide, require or make a field optional under a condition. The settings side of this is in Chapter 1.

Lists. Every master data list has the same controls: a search box, sortable columns, column filters, an **Advanced filter** panel with **Apply**, **Clear** and **Save query…** (saved queries reload from a dropdown), and paging.

6. Accounts, including Account 360

What it is

An account is a company or organisation: a customer, a prospect, an OEM or an end customer. It is the hub: contacts, cases, assets, quotations and invoices all hang off it. **Account 360** is a side panel with a health rating and everything about one account in one view.

Where to find it

Master data > Accounts (`/accounts`). New: **+ New Account** (`/accounts/new`). An account opens at `/accounts/<id>` .

Who uses it and which module switches it on

Sales, service and management. Module: **Accounts** (`accounts`). Business role entry: **Accounts**. Account 360 shows only in workspaces on the Nova or Spectacular experience. **Analyse company** needs the AI assistant and web research.

How to use it

Create an account

1. Select **+ New Account**.
2. Under **Identity** enter **Company name** (required) and **Account type** (required).
3. Fill in **Address**, **Communication** (Primary phone, Secondary phone, Primary email, Secondary email, Website) and **Business** (Industry, Employees, Annual revenue, GSTIN).
4. Under **Notes & Referral**, set **Referred by account ID** when an OEM referred an end customer.
5. Select the save button. The account opens with its ID.

Find and filter

1. On the list, use **Search accounts...** and the **All types** picker.
2. Open the **...** menu to turn on the optional **Phone** and **AMC** columns.
3. Use **Advanced filter** for conditions on any standard or custom field.

Work from the account page

1. The page opens on **Overview**. Other tabs appear for the modules you own: **Cases**, **Contacts**, **Assets**, **Quotations**, **Projects**, **Invoices**, **Estimates** and **Activity**. Each tab shows a count.
2. In the right-hand rail, **Quick create** starts a new case, contact, asset, quotation, invoice or project with this account already chosen.
3. Select **Edit** in the ⋯ menu to edit fields in place on the Overview tab.

Open Account 360

1. On the account page select **Account 360**. In the list, use the small icon next to a name.
2. Read the **rating** at the top: a score out of 100, a grade and the working behind it.
3. Read **What to do next**: suggested actions, most urgent first, each with a link.
4. Read the cards below. Each card is a summary with figures and rows that link to the records.
5. Cards from outside sources are tagged **Source**.

Analyse the company

1. Select **Analyse company** on the account page. The assistant opens, asks to search the web, and returns an analysis card.

Fields and statuses

Account type	Meaning
Prospect	Not yet a customer
Direct customer	Buys from you directly
OEM / Vendor	A dealer or OEM that refers business to you
End-customer (under OEM)	Reached through an OEM. Use **Referred by**

Field sections: Identity, Address, Communication, Sales, Business, Saudi e-invoicing, Notes. The Saudi e-invoicing section (buyer type, VAT number, commercial registration, Arabic name, building and district) is for workspaces that use Saudi e-invoicing.

Account 360 rating

Part	Points	What it looks at
Recency	25	Days since anything happened on the account
Win rate	25	Decided quotations only. An account with none is neutral
Payment	20	Overdue invoices, the loudest bad signal
Service	15	Open cases, and cases that have aged
Relationship	15	How many contacts you have. One contact is fragile

Grade	Score	Label
A	80 to 100	Healthy
B	60 to 79	Steady
C	40 to 59	Needs attention
D	below 40	At risk

Account 360 cards: Pipeline, Revenue, Service, People, Installed base, Contracts, Sales coverage (when Coverage is on), Projects, plus buying signals, company analysis and "Won work, nothing invoiced" when they apply. External sources are added in **Settings > Account 360** (Chapter 1).

Links to other records

- **Contacts, Cases, Assets, Quotations, Invoices, Estimates, Projects**: the tabs above.
- **Referred by**: another account (an OEM).
- **ERP**: when an integration is on, an ERP ID line shows under the title.
- **Change history**: the Activity tab (administrators).

Good to know

- The rating is not an AI call. It is a fixed rubric that shows its working, so it is the same on every reload. The AI may word suggestions but never changes the score.

- Phone, email and GSTIN are stored encrypted.
- Deleting an account is not offered on the account page (verify where an administrator deletes one).
- The new-account form calls the types "Direct Customer", "OEM / Dealer" and "End Customer". The list and pills say "Direct customer", "OEM / Vendor" and "End-customer (under OEM)". They are the same four values.
- Account 360 never exposes external-source credentials to non-administrators.

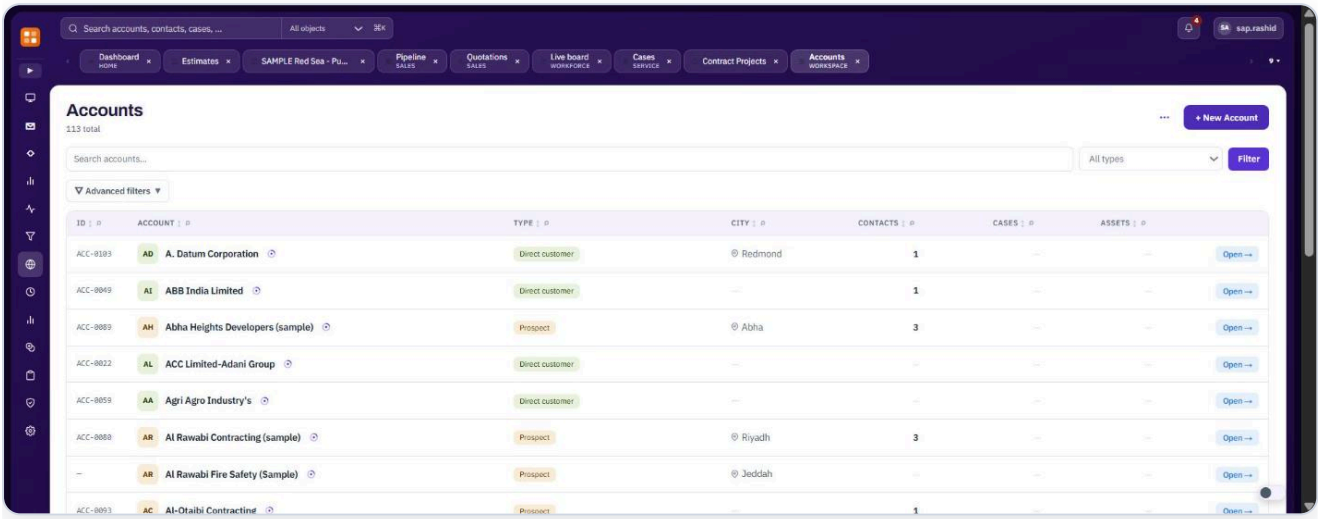


FIGURE 59 The Accounts list with type picker and counts.

7. Contacts

What it is

A contact is a person at an account. Every contact belongs to exactly one account.

Where to find it

Master data > Contacts (`/contacts`). New: **+ New Contact** (`/contacts/new`). A contact opens at `/contacts/<id>` .

Who uses it and which module switches it on

Sales, service and marketing. Module: **Contacts** (`contacts`). Business role entry: **Contacts**. The **Marketing** tab needs Marketing with the Newsletter Studio (Email health) or Lead scoring (Consent).

How to use it

Add a contact

1. Select **+ New Contact**. From an account page you can start with the account already chosen.
2. Under **Identity** enter **Full name** (required) and **Account** (required). Add Role / designation, Department, Birthday and LinkedIn URL.
3. Add up to three phone numbers, two emails and a website. Add the address and notes if you need them.
4. Select the save button.

Find a contact

1. Use **Search by name, role or account...**.
2. Turn on the optional **Email** and **Account type** columns from the **...** menu.

Check email health (where switched on)

1. Select **Email needs attention** on the list to see contacts whose address bounced or is in doubt. Columns show the status, since when, and the account owner.
2. On a contact, open the **Marketing** tab. On **Email health** select **Check address**, **Fix the address** or **Mark as checked** (with a reason).

Record consent (where switched on)

1. Open the **Marketing** tab. On the **Consent** card, select **Record consent** or **Record withdrawal**. Pick a topic, or "Any consent topic".
2. The card keeps a history.

Fields and statuses

Sections: Identity, Phone numbers, Email & web, Address, Sales, Notes.

Email health	Meaning
Not checked yet	Not sent to and not checked
Working	Mail was delivered, or it was checked and looks fine
Trouble delivering	A soft bounce. It may clear by itself
Bounced	The address does not exist. We will not email it again

Links to other records

- **Account**: required. Shown in the facts line.
- **Cases**: the Cases tab, with open cases counted.
- **Marketing**: consent, email health, newsletters and leads.

Good to know

- A contact cannot exist without an account. In bulk import (section 15) the contact file must name an account that already exists.
- Phone and email are stored encrypted.
- There is no delete on the contact page.
- Business roles hide the menu item. They do not change what consent allows.

8. Partners

What it is

A placeholder for OEM referral partners. In the current product it holds no records.

Where to find it

Master data > Partners (`/partners`).

Who uses it and which module switches it on

Module: **Partners** (`partners`). Business role entry: **Partners**.

How to use it

There is nothing to do on this screen yet. The screen shows "Coming in a later slice". There is no partners list, form, API, import or export.

Good to know

- To track an OEM or dealer today, create an **Account** of type **OEM / Vendor** and link its end customers with **Referred by**. That is how referral sources are recorded now.
- Partners are not in search, Change history or Data Workbench.

9. Suppliers and supplier groups

What it is

A supplier is a company you buy from: a vendor, a subcontractor, or both. A **supplier group** is a client's approved supplier list. For that client's tenders and projects, only its members can be asked for a price.

Where to find it

Master data > Suppliers (`/suppliers`). New: **+ New Supplier** (`/suppliers/new`). A supplier opens at `/suppliers/<id>` . Groups: the **Groups** chip on the list, or the **Groups** tab (`/suppliers/groups`).

Who uses it and which module switches it on

Procurement and estimating. Module: **Suppliers** (`suppliers`). Business role entry: **Suppliers**. Groups also need the tender edition (`gcc_tender`). Without it the Groups address answers "not found".

How to use it

Add a supplier

1. Select **+ New Supplier**.
2. Under **Supplier details** enter **Name** (required) and **Type** (required): Vendor, Subcontractor, or Both.
3. Add Phone, City, Email, GSTIN and Notes. Select the save button.

Find a supplier

1. Use **Search by name, city, email or GSTIN…** and the chips **All**, **Vendors**, **Subcontractors**, **Both** and **Inactive**.

See what a supplier provides

1. Open the supplier and its **Products** tab. It lists products that name this supplier as their preferred supplier, with SKU, UoM and list price.

Create a supplier group (tender edition)

1. Open **Suppliers**, select **Groups**, then **New group**.
2. Enter a **Name** (required). Choose the **Client** account it belongs to.
3. Under **Members** tick the suppliers on the client's approved list. **All** and **None** select a page at once. Search when the list is long.
4. Select **Save**. A row opens the same panel to edit. **Delete** asks for a second confirmation (**Delete group** or **Keep**).

Fields and statuses

Type	Pill
Vendor	Vendor
Subcontractor	Subcontractor
Both	Vendor & Sub

Status: **Active** or **Inactive**. A group has a name, a client, and members; the list shows the member count.

Links to other records

- **Products**: preferred supplier on a product.
- **Inventory**: preferred supplier on an item.
- **Purchase orders and RFQs**: suppliers are who you buy from and ask.
- **Accounts**: a group is tied to a client account.

Good to know

- A client has one group. A client with none can be asked any supplier. A supplier can sit in several groups.
- Once a client has a group, an RFQ for that client's tender deal or contract project to a supplier outside the list is refused, with no override.
- The supplier form calls the tax number **GSTIN**.
- Suppliers have a delete in the ⋯ menu, with a few seconds to undo. Groups need a database update to be applied first, otherwise the screen says so.

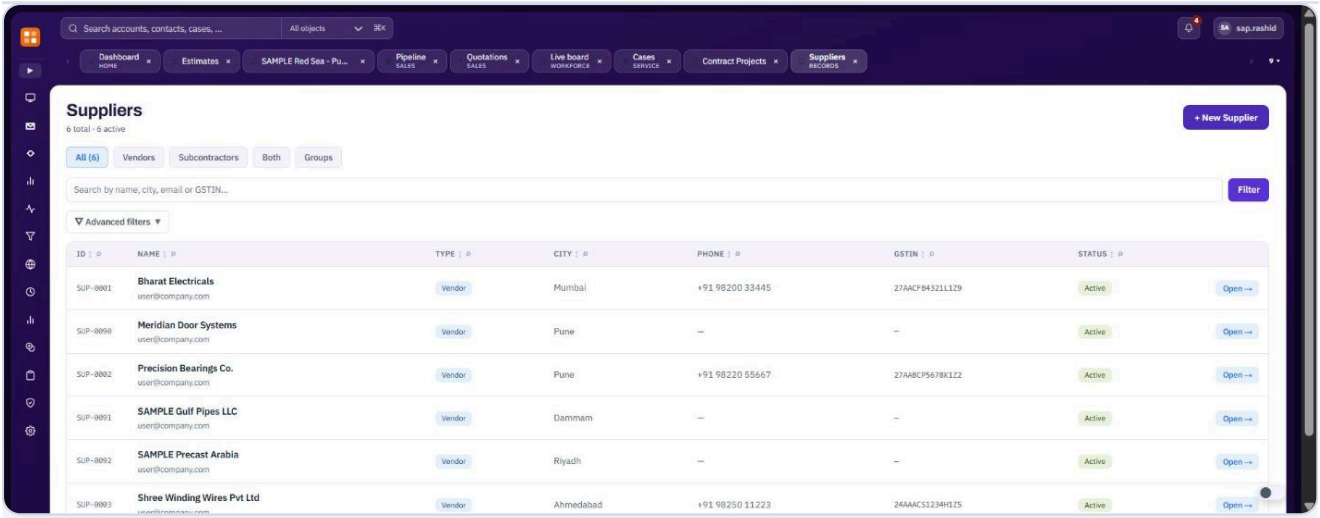


FIGURE 60 The Suppliers list with type chips and the Groups chip.

10. Products

What it is

A product is something you sell or use: goods, services, or a bill-of-materials kit. The product record carries prices, tax, category and, for kits, the components and rolled-up cost.

Where to find it

Master data > Products (`/products`). New: **+ New Product** (`/products/new`). A product opens at `/products/<id>` .

Who uses it and which module switches it on

Sales and pricing owners. Module: **Products** (`products`). Business role entry: **Products**. The **Pricing** tab appears when any of these is on: Pricing (`pricing_engine` , shows **Cost sheet**), Standard Quotes (shows **Quantity breaks**), or Coverage (shows **Availability**).

How to use it

Add a product

1. Select **+ New Product**.
2. Under **Product details** enter **Name** (required). Add SKU, Unit of measure, Category, Sub-category, Item type, Preferred supplier and Description.
3. Under **Pricing** enter **List price**, **Cost price** and **Tax %**.
4. Select the save button.

Find a product

1. Use **Search by name, SKU, category, supplier or description...** and the **All item types** picker (including **Not classified**).

Build a kit with components

1. Give the product the item type **BOM / kit**. Only that type can have components.

2. Open its **Components** tab and select **+ Add component**.
3. Search by name or SKU and pick the item. Enter **Quantity**, **Unit**, **Scrap %** and **Kind** (**Consumed**, or **Used (tool)** for a tool that adds no material cost). Add a note.
4. Select **Add to BOM**.
5. Read the **Cost roll-up**: **Rolled-up cost**, **Stored cost price** and the **Difference**. Select **Apply to product cost** to copy the roll-up into the cost price.

Set a cost sheet or quantity breaks

1. Open the **Pricing** tab. On **Cost sheet** select **Edit**, then **+ Add a cost line** and **Save**.
2. On **Quantity breaks** read the price list with its scales. It is replicated from your ERP or kept here, and quotes use it automatically.

Fields and statuses

Sections: Identity, Pricing, Details. Status: **Active** or **Inactive**. The record also shows Margin, worked out from list and cost price.

Item type (default list)	Description
Finished product	Made by you and sold as it is
Semi-finished	A part you make and use inside something else
Raw material	Bought in bulk and consumed
Bought-out component	A ready-made part bought from a supplier
Consumable	Used up along the way
Custom / made to order	Built for one order, never held in stock
Service	Labour, installation, a service plan
Tool / equipment	Used to do the work, not consumed
Certification / document	A certificate or drawing that goes with an order
BOM / kit	Made up of other items, with cost rolled up

A workspace can rename, hide or add types in **Settings > Products** (Chapter 1).

Links to other records

- **Supplier**: the preferred supplier.
- **Quotations, Standard Quotes, Sales Orders**: lines copy a product's details. Existing lines keep their copy if the product is later deleted.
- **Used in**: the tab lists the kits that use this product as a component.
- **Pricing engine**: the cost sheet and quantity breaks feed price lookup.

Good to know

- **Cost price is internal.** It is shown to staff in the app and in Data Workbench. It never appears in Talk to data, the assistant, the REST API or MCP. The preferred supplier is internal in the same way.
- The roll-up does not update the cost price by itself. You must select **Apply to product cost**. **Apply anyway** appears only when the roll-up is incomplete.
- A product that is a component of a kit cannot be deleted until it is removed from that kit. The error names the kits.
- BOM components can be bulk loaded with Data Workbench (**BOM components**).
- The product page has a delete in the ⋯ menu with a few seconds to undo.

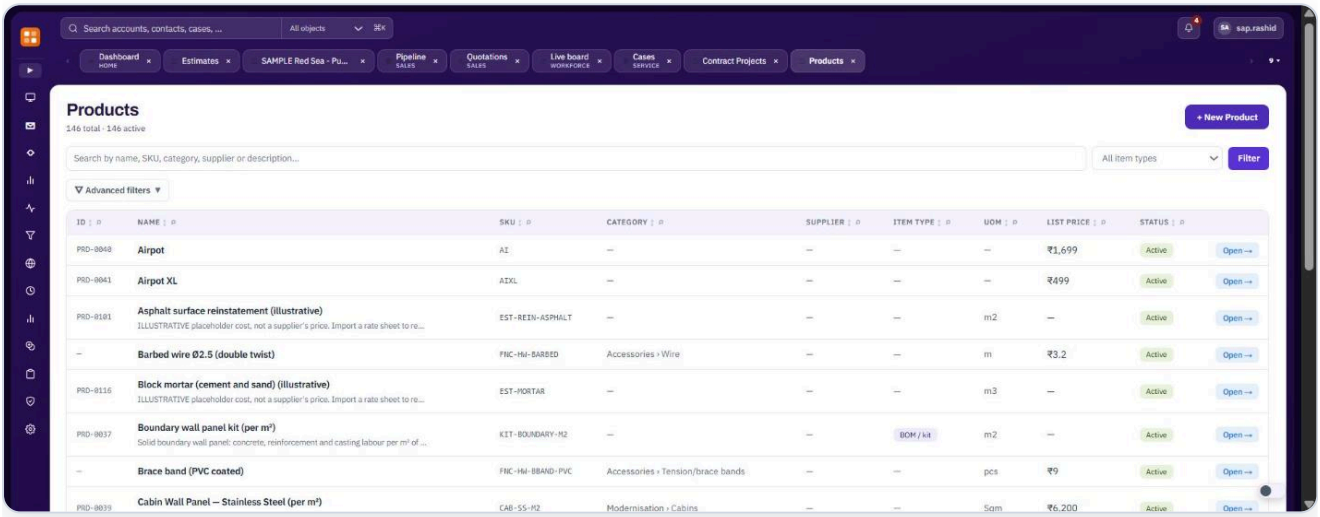


FIGURE 61 The Products list with item type picker.

11. Inventory

What it is

Inventory holds stocked items (parts and spares) with quantity on hand, a reorder level and a movement history.

Where to find it

Master data > Inventory (`/inventory`). New: **+ New** from the list (`/inventory/new`). An item opens at `/inventory/<id>` .

Who uses it and which module switches it on

Store keepers and buyers. Module: **Purchasing** (`purchasing`), which also switches on Purchase Orders. Business role entry: **Inventory**.

How to use it

Add an item

1. Select the new-item button.
2. Under **Item details** enter **Name** (required). Add SKU, Description, Category, UOM and Preferred supplier.

3. Enter **Reorder level** and **Unit cost**. Add notes. Select the save button.

Spot low stock

1. On the list, a quantity at or below the reorder level shows a red **Low** pill. The **Low stock** chip filters to those items.

Adjust stock

1. Open the item and select **Adjust stock** (or the **Stock** tab).
2. Enter **Qty change** (use a negative number to reduce stock, a positive number to add stock not tied to a purchase order). Add a **Reason (optional)**.
3. Select **Apply**. The change shows in **Recent stock movements**.

Fields and statuses

Sections: Identity, Stock, Notes. Status **Active** or **Inactive**. Movements are labelled **Received (PO)** or **Manual adjustment**.

Links to other records

- **Supplier**: the preferred supplier.
- **Purchase orders**: receiving a purchase order adds stock and writes a "Received (PO)" movement.
- **Quotation lines**: a line can point at an inventory item.

Good to know

- An item referenced by a purchase order line or a quote line cannot be deleted. The product says so.
- The adjustment must be a non-zero number.
- Inventory is separate from Products. Products is what you sell. Inventory is what you hold.

12. Assets

What it is

An asset is a piece of equipment: a customer's motor, transformer, pump, generator or panel, or one of your own loaner units. Chapter 3 (Service) covers assets in full, including loaner units and service history. This section covers the master data side.

Where to find it

Master data > Assets (`/assets`). New: **+ New Asset** (`/assets/new`). An asset opens at `/assets/<id>` .

Who uses it and which module switches it on

Service coordinators and quotation writers. Module: **Assets** (`assets`). Business role entry: **Assets**.

How to use it

1. Select **+ New Asset**. Enter **Asset name** and **Kind** (required). Add Make / brand, Model, Serial number and Rating / specs.

2. Under **Ownership** choose the **Customer account**, or leave it blank and tick **This is a loaner unit**.
3. Find assets with **Search name, make, model, serial or account...** and the **All types** picker (including **Loaner stock**).

Fields and statuses

Kinds: Motor, Transformer, Pump, Generator, Panel / Switchgear. Sections: Identity, Specifications, Nameplate, Notes.

Links to other records

Account (owner), Cases (service history), Quotations (attached equipment), Work orders.

Good to know

- Assets have no status workflow.
- There is no delete on the asset page.
- See Chapter 3 for loaners and history.

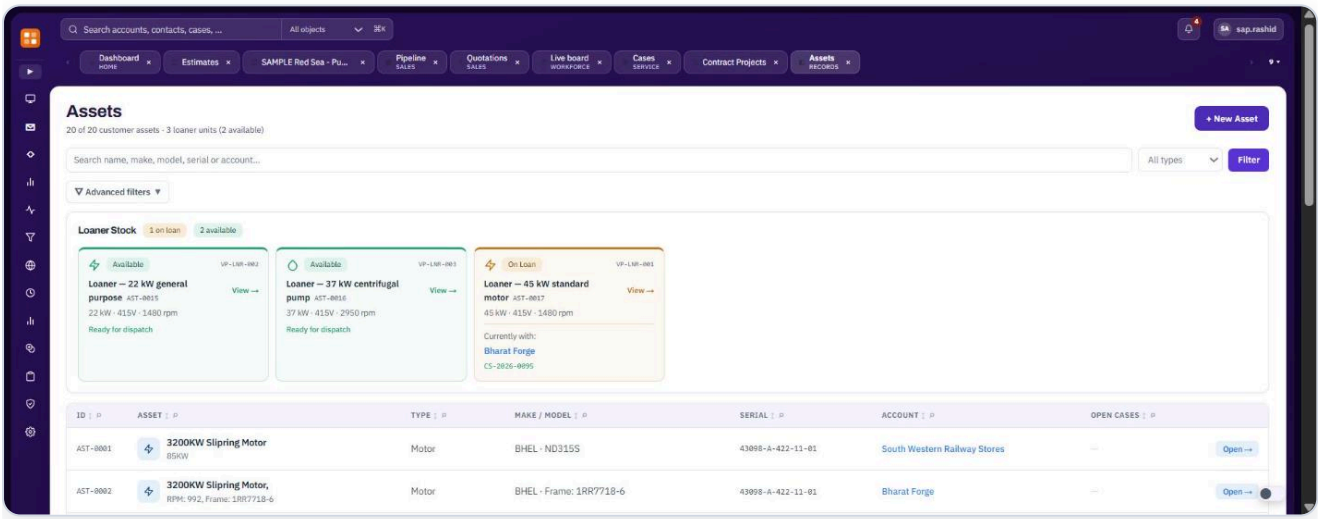


FIGURE 62 The Assets list with the Loaner stock card.

13. Employees

What it is

Employees are your people as master data: name, code, contact, department, designation and validity dates. This list is separate from a person's login. An employee can be given a login in **Settings > People**.

Where to find it

Master data > Employees (`/employees`).

Who uses it and which module switches it on

HR and administrators. Module: **Business roles** (`business_roles`), the bundle that ships Employees with business roles and business users. Business role entry: **Employees**. Only administrators can create, edit or delete. Other people with the menu item see the list read-only.

How to use it

Add an employee

1. Select **+ New Employee**.
2. Enter **First name** (required). Add Last name, Employee code, Email, Phone, Department, Designation, **Valid from** and **Valid to**.
3. Set **Status** to **Active** or **Obsolete**. Select the save button.

Make an employee obsolete

1. On the row, select **Delete**. The dialog first checks what is recorded for the person.
2. If records exist, it lists them and offers **Make obsolete** instead. The person stays in reports up to their Valid to date.
3. If nothing is recorded, it offers **Delete**.

Bring someone back

1. On an obsolete row, select **Make active**. Confirm. A note warns if the old valid-to date was in the past.

Load many at once

1. Use **Data Workbench > Import > Employees** with an HR export (section 15).

Fields and statuses

Status	Meaning
Active	Counts in reports
Obsolete	Counts for every day up to and including Valid to, and for no day after

Sections: Identity, Contact, Employment, Custom fields.

Links to other records

- **Workforce**: attendance, roster, leave and time summary read the employee list.
- **Login**: **Settings > People** gives an employee a login.
- **Search**: found by name, code, department.

Good to know

- Delete is blocked once attendance records exist, because deleting would erase those records for good. Make the person obsolete instead.
- An obsolete employee with no Valid to date is excluded from reports.
- The module flag for this screen is `business_roles` , not the Workforce flag (verify that this is intended for workspaces with Workforce only).

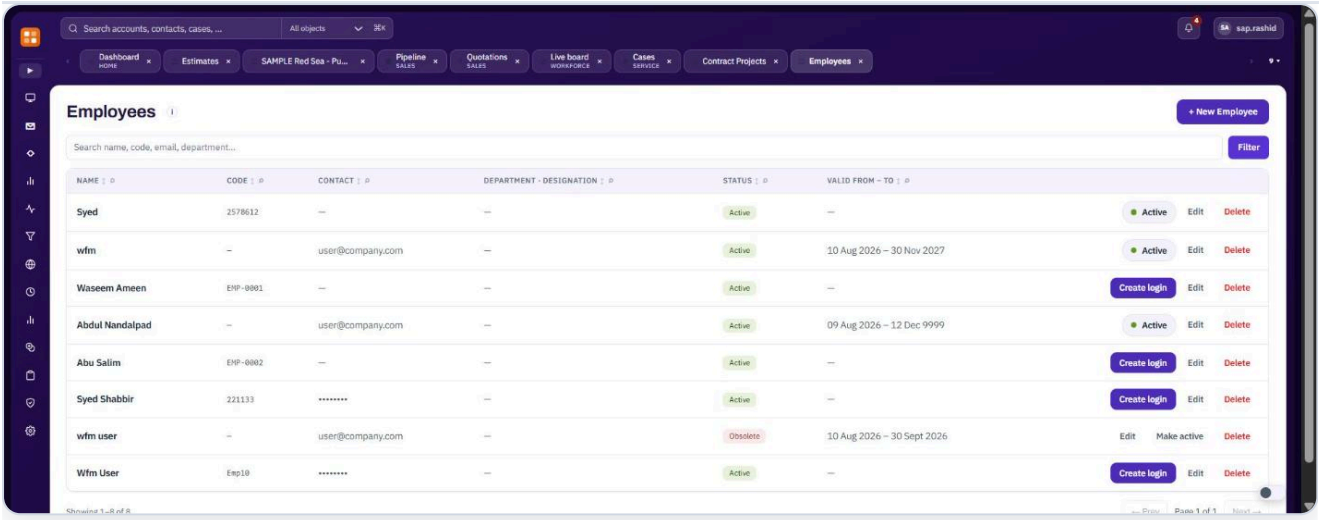


FIGURE 63 The Employees list with status pills and row actions.

Part C. Pricing, data tools and audit

14. Pricing

What it is

Pricing is the pricing engine: you choose how you price, set your numbers, check a sample bill, and go live. Quote lines can then fetch a price from it. It is a separate product module.

Where to find it

Insights > Pricing (`/pricing` , which opens **Today's rates** at `/pricing/today`). Five tabs sit across the top.

Tab	Address	What it is for
Today's rates	`/pricing/today`	What is live right now, in plain language
Pricing setup	`/pricing/setup`	Pick a method, set numbers, see a sample bill
History	`/pricing/history`	Every version that has gone live, and what was live on any date
RFQs	`/pricing/rfqs`	Where the engine found no cost and asked a supplier. Enter the reply here
Advanced	`/pricing/advanced`	Raw versioned configuration, for when the wizard is not enough

Who uses it and which module switches it on

Pricing managers. Module: **Pricing** (`pricing_engine`). Business role entry: **Pricing**. Only people with edit rights on Pricing can change anything. A quote line pulling a live price needs a second, separate switch (`pricing_engine_quotes`).

How to use it

Set up pricing for the first time

1. Open **Pricing setup**. Pick a method (below).
2. Set your numbers: rates, margins, discounts, tax. Rates can depend on customer tier, region or document type.
3. Select **Continue to sample bill** and check the sample.
4. Select **Go live** in the amber bar at the top.

Change a number later

1. Edit on **Pricing setup**. An amber bar says "You have unsaved pricing changes". That is a draft.
2. Select **Go live** to publish it, or **Discard** to drop it (this cannot be undone).

Run a second Price Book

1. Select **+ New price book** (top right) and name it, for example "Service parts".
2. Use the Price Book picker to switch between books. Each book holds one pricing method.

Answer a supplier request

1. Open the **RFQs** tab. Enter the supplier's reply. The next **Fetch price** uses it.

The four methods

Method	Idea
Cost-based	Start from what it costs you, then mark up, by segment, not one number for everyone
Price list	One list price per customer group, most specific wins
Value-based	Adjust from a base value by what the customer values
Catalog + Formula	A negotiated rate where you have one, a cost formula everywhere else

Cost-based setup also has:

- **Your cost rates**: what one unit of each input costs today.
- **Where a cost comes from**: a ladder tried in order. A figure older than its limit is skipped, never used.

Rung	Source	Fresh for
1	ERP cost price on the product	30 days
2	Supplier RFQ reply	180 days
3	Imported cost price list	365 days
4	Rate kept by hand in the cost model	no limit

- **When a quote falls below the minimum margin**: **Warn the rep, let the quote go out**, or **Block sending until it is re-priced or approved**.

Fields and statuses

A pricing version is **DRAFT**, **PUBLISHED** or **SUPERSEDED**. The Price Book picker marks a book "(draft)" or "(empty)" until it has a published version.

Links to other records

- **Products**: cost price, cost sheet and quantity breaks.
- **Standard Quotes**: lines can fetch a price from the live book.
- **RFQs**: a missing cost raises a supplier request.
- **Change history**: **Pricing: Versions** and **Pricing: RFQs**.

Good to know

- Going live is always a deliberate step. Nothing changes for quotes until you select **Go live**.
- Small Scale Pricing in **Settings** is a separate, simpler rate list and is unchanged by this module.
- If your live pricing was set up in an older way the screen cannot read, Today's rates says so (verify what it offers).

15. Data Workbench

What it is

Data Workbench loads, extracts and corrects records in bulk from spreadsheets. It has three modes: **Import** (create new records), **Export** (download records) and **Update** (change existing records).

Where to find it

Admin > Data Workbench (`/data-workbench`). The mode is a tab at the top and survives a reload (`?tab=import` , `?tab=export` , `?tab=update`).

Who uses it and which module switches it on

Administrators and data owners. Module: **Data Workbench** (`data_workbench`). Business role entry: **Data Workbench**. Each object also needs its own module. A workspace without Cases never sees Cases here, and the routes behind enforce the same.

How to use it

Import new records

1. Choose **Import**, then pick what to import on the left (for example **Accounts**).
2. Under **Or start from the template**, select **Download Accounts template**. It carries every column, with example rows. It always matches your current field setup, including custom fields.
3. Replace the examples with your data. Save as `.csv` , `.xlsx` or `.xlsm` .
4. Under **Upload your file** drop the file or click to browse (up to 15 MB). Your own column names are fine.
5. On **Match columns**, point each column at a field.
6. On **Review**, read "N ready" and "N with problems". Rows with problems are left out. Select **Show only problems** and **Download** the problem list if needed.
7. Select **Import N rows**. The **Result** step shows what was imported and what failed, with a report to download.

Export records

1. Choose **Export** and pick an object.
2. Under **Choose columns** tick the columns. **Record ID** is always included.
3. Under **Filters** select **+ Add filter** to export only matching rows.
4. Select **Download ... CSV**.

Update existing records

1. First **Export** the records you want to change. Keep the **Record ID** column.
2. Edit the values in the file. Do not edit the Record ID.
3. Choose **Update**, pick the object, and upload the exported file under **Or use a file you exported**.
4. Match columns, review ("Rows with problems are left out"), and select **Update N rows**.

What each object supports

Object	Import	Export	Update	Notes
Accounts	Yes	Yes	Yes	Import first. Others link to it by name
Contacts	Yes	Yes	Yes	Needs an existing account by name
Assets	Yes	Yes	Yes	Blank account makes loaner stock
Suppliers	Yes	Yes	Yes	
Products	Yes	Yes	Yes	Includes quantity breaks
BOM components	Yes	Yes	Yes	Needs the kit product
Inventory	Yes	Yes	Yes	
Employees	Yes	Yes	Yes	Includes custom fields
Users	Yes	Yes	No	Invites by email. Never updated in bulk
Consents	Yes	Yes	No	An append-only ledger. A change is a new answer. Needs Marketing
Quotes	Yes	Yes	Yes	One row per line, header values repeated. Import creates the quote with its lines in one file
Quote lines	Yes	Yes	Yes	Only adds lines to an existing quote
Standard quotes	Yes	Yes	Yes	Header only. Add lines with Standard quote lines
Standard quote lines, Sales order lines	Yes	Yes	Yes	Only for existing draft documents, found by their ID
Sales orders	Yes	Yes	Yes	Header only
Cases, Work orders, Invoices, Purchase orders	Yes	Yes	Yes	
Deals (pipeline)	Yes	Yes	Yes	Amount and probability are computed

Object	Import	Export	Update	Notes
RFQs	No	Yes	Yes	An RFQ is raised from a record, with its lines and suppliers
Estimates	Yes	Yes	Yes	Header only. Import makes a draft from a template name
ABM programs, ABM target accounts, ABM buying groups	Yes	Yes	Yes	Needs ABM
Projects (workforce)	Yes	Yes	Yes	Import parents before children

The list shows only the objects your workspace owns and, in Update, only those that can be updated.

Fields and statuses

Step	Name on screen
1	Upload
2	Match columns
3	Review
4	Result

Links to other records

- **Change history**: every row updated in bulk writes a Change history entry.
- **Import order**: the left panel shows "Import ... first" for dependencies, for example contacts need accounts.
- **Custom fields**: template columns include your custom fields.

Good to know

- **Create does not use a record ID.** A new record has none yet. Import links records by a business key you type: an account name, a program ID such as `ABM-0001` , a template name.
- **Update always needs the Record ID** from an earlier Export. A file with names or references only is refused. Do not type IDs by hand.
- Update only changes plain fields. Fields that link to other records are not updated in bulk.
- A row whose ID does not exist in your workspace fails cleanly and is never turned into a new record.
- Quotes can also be created from a PDF or Word document: the product reads the document, you review the rows, then import.
- Cost price is in the Products export and import, but never in the API.
- Cells that start with `=` , `+` , `-` or `@` are protected in downloaded CSVs.
- Legacy `.xls` files are not supported. Save them as `.xlsx` or `.csv` .

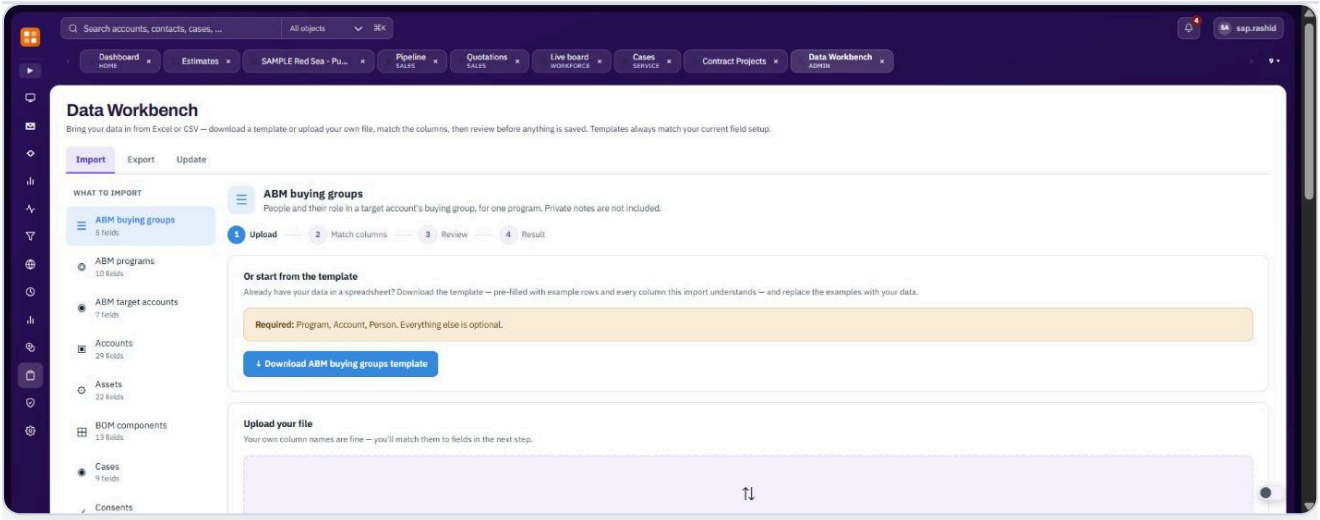


FIGURE 64 The Import mode with the template download and upload box.

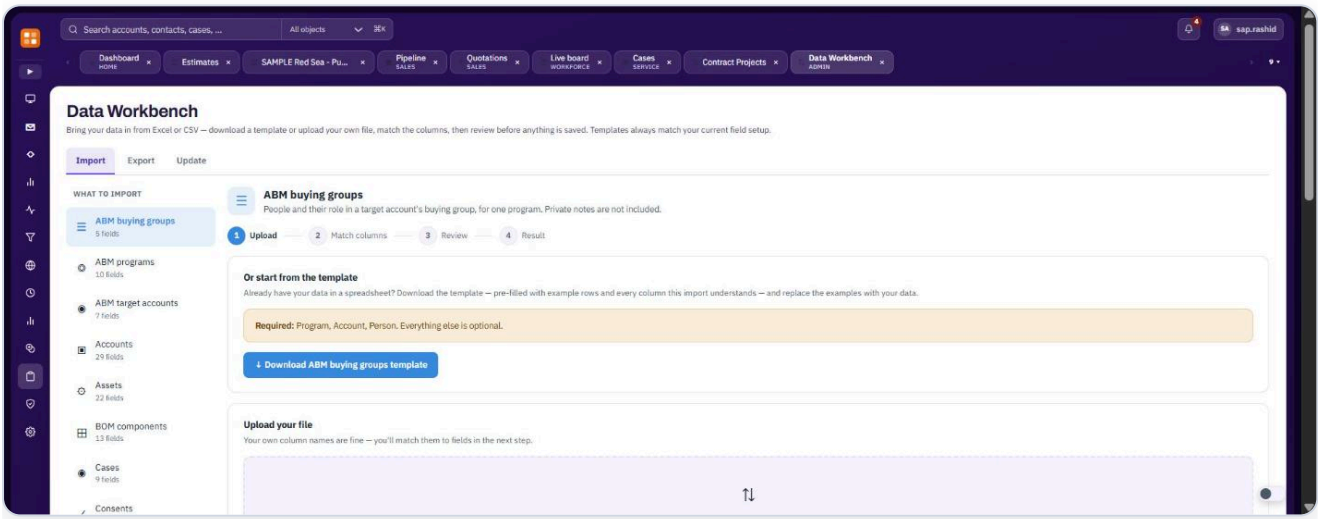


FIGURE 65 The Review step with ready and problem rows.

16. Change history and Audit

What it is

Audit & Users is the home for audit tools. **Change History** records every create, update and delete at the moment it happened: who, when and what changed. **Outbound Emails** records every email the product tried to send.

Where to find it

Admin > Audit & Users (`/administration`). Cards: **Change History** (`/administration/change-history`), **Outbound Emails** (`/administration/outbound-emails`) and **People**, which opens **Settings > People**. A single record also has an **Activity** tab.

Who uses it and which module switches it on

Administrators only. The pages send other people back to the Dashboard. Modules: **Administration** (`administration`) for the hub, **Change history** (`change_history`) and **Outbound email** (`outbound_email`) for the two cards. Business role entry: **Audit & Users**.

How to use it

Look up changes to an object

1. Open **Change History**.
2. Pick an object in the object picker (for example **Accounts**, **Products**, **Sales Orders**).
3. Leave **Record ID (optional)** blank for all records, or paste one record's ID.
4. Select the search button. Rows list **When**, **Action**, **Record** and **By**. Select a row to see the field-by-field changes.
5. Select ↓ **Download CSV** for a file with date, action, object, ID, record, changed by, via and the changes.

See one record's history

1. Open the record and its **Activity** tab. Administrators see the history there.

Check an email

1. Open **Outbound Emails**. Pick a channel (**Quote emails**, **Invoice emails**, **Sales order emails**, **Supplier RFQs**, **Inbox replies**, **Campaign sends**, **Workforce alerts**, **Password resets**) and optionally a record ID.
2. Rows show recipient, subject and whether it succeeded. Select ↓ **Download CSV** to export.

Fields and statuses

Action	Meaning
create	A record was made
update	One or more fields changed
delete	A record was removed
reopen	A record was reopened

A change made by the assistant or an integration carries a "via" note, for example "via assistant".

Links to other records

Every object on the list, from accounts to pricing versions, writes here. Some entries are shown only when the matching module is on: for example Newsletters, Leads, Forms, ABM, Journeys, Webhooks, Integration mappings, Deals: Tender details, Contract projects and Inbox.

Good to know

- A search returns up to 5,000 rows.
- Only changes made after the feature was switched on are listed.
- Records made by Data Workbench bulk update are logged row by row.
- Change history cannot be edited.

17. Process Design Studio

What it is

The Process Design Studio helps a business describe how it works and see how BPMSquare fits. It ends with a cited fit report, proposed changes, a project plan to validate, and a request to talk to BPMSquare. It is guided: tell us, check the map, check the fit, see what we would change, validate the plan, send.

Where to find it

Workspace > Process Design Studio (`/process-studio`). New: **+ Study** (`/process-studio/new`). A study opens at `/process-studio/<id>` .

Who uses it and which module switches it on

Prospects trying the product, new clients during onboarding, and administrators starting a study for a new area. Module: **Process Design Studio** (`process_studio`). Business role entry: **Process Design Studio**. It is a sold module. It also uses the workspace's monthly AI allowance.

How to use it

Start a study

1. Select **+ Study**. Give it a **Name** (your company, or the part of it you want to look at). It takes about twenty minutes.
2. Step 1 opens.

The six steps

Step	What you do	Main button
Tell us	Describe your business in your own words. Answer the area cards if you want (Sales, Service & repairs, Production & delivery, Procurement, Workforce, Pricing & estimating, Marketing, Finance). Pick a language	Build my process map
Your process	Edit the map. Rename, add, reorder or remove steps, change the role, add a role	Check the fit
How BPMSquare fits	Read the rating per step, with what covers it, named	See what we'd change
What we'd change	Keep or drop each proposed change, or add your own	Build my plan
Your plan	Set the start date and weekend. Edit tasks, owners and days. Tick or comment per phase. **Save**	Send to BPMSquare
Talk to us	Enter your name and an email for the call-back. **Download PDF**	Send to BPMSquare

1. Use **Show me how** on any step for a short walkthrough.
2. Use the **Build … again** or **Check again** buttons to redo a step after you change the inputs.
3. After sending, **Send a new version** lets you send an updated study.

Fields and statuses

Study status	Meaning
Telling us	You are describing the business
Mapped	The process map is built
Fit ready	The fit report exists
Changes ready	Proposed changes exist
Plan ready	The plan exists
Sent to BPMSquare	Submitted
Reviewed by BPMSquare	The BPMSquare team has looked
Accepted	Agreed
Re-scoped	Scope changed after review
Closed	Finished

Fit rating	Meaning
Standard	Covered as it ships
Needs setup	Covered once an administrator sets it up
Partly covered	Some of it is covered
Not covered	Not covered
Needs review / Coming	To be checked by the BPMSquare team, or planned

Kind of change	Meaning
Setting	A choice an admin makes in Settings
Your own fields	Extra fields on an object
Built for you	A tenant-specific extension
New build	A standard feature that does not exist yet
Integration	A connector, API or webhook

Plan phases, in order: Foundations, Master data, Sales and estimating, Service and production, Workforce, Customisations, Integrations, Go-live and training.

Links to other records

- **Settings**: many proposed changes are Settings entries named in the report.
- **Change history**: studies are logged as **Process studies**.
- **Provisioning**: an accepted plan hands over to workspace set-up.

Good to know

- The list shows each study's ID, status, version (v1, v2...), the step reached and the date.
- On the shared demo workspace a study is private to the person who made it. On a client workspace, every administrator sees every study.
- Each fit claim is cited against what the product really has. The report is labelled a draft until the BPMSquare team marks it reviewed.
- A study has a cap on the number of messages you can send. When it is reached, press **Build my process map** to carry on with what you have said.
- The map, the changes and the plan are yours to edit. The AI only drafts them.

Common questions

1. I switched to Curated and my layout disappeared. Is it lost? No. Curated is a fixed set of blocks that ignores every saved layout. Select **My layout** in the switch and your arrangement is back.

2. Why can I not see Talk to data, Pricing or the Process Design Studio? Each is a separate module that the BPMSquare team switches on. If the menu item or tab is missing, the module is off for your workspace, or your business role hides it. Ask your BPMSquare contact. Your own administrator cannot switch modules on.

3. Why does Update say it needs a Record ID? Update changes existing records, and it finds them by their real record ID, never by a name or reference. A name can repeat or change. The ID cannot. Export the records first, edit the file and keep the **Record ID** column.

4. I search for a customer's phone number and nothing is found. Phone numbers and email addresses on accounts and contacts are stored encrypted, so they cannot be searched. Search by name or ID.

5. Why can the assistant not create a case or a product? Today it can propose only accounts and contacts, and only in workspaces where the BPMSquare team switched that on. Everything else is made on its own screen. It also cannot change or delete a record.

6. Why can I not delete an employee? Deleting would erase their attendance and other records and remove them from every report. When records exist the product blocks delete and offers **Make obsolete**. The employee stays in reports up to their Valid to date.

7. Where can I see who changed a record? An administrator opens the record's **Activity** tab, or **Admin > Audit & Users > Change History**, picks the object and optionally pastes the record ID. Changes made by the assistant are marked "via assistant".

8. Does the cost price I enter on a product reach the API or the AI? No. Cost price and preferred supplier are internal. They are available to staff in the app and in Data Workbench, and are never sent to Talk to data, the assistant, the REST API or MCP.