# Aisha CRM - Comprehensive User Guide

Generated on 11/17/2025, 7:32:53 PM

# Aisha CRM — Comprehensive User Guide

Generated on: ${new Date().toLocaleString()}

Welcome to the Aisha CRM User Guide. This book covers everything from first-time setup to advanced AI-driven workflows. It is organized in 14 chapters with 3 appendices. Use the table of contents below to jump to any topic.

> Tip: In the web app, use the “Download PDF Guide” button to get an offline-friendly version of this guide. The PDF is always generated from the latest markdown, ensuring the content is up to date.

---

## Table of Contents

# Chapter 1: Introduction

Aisha CRM is a multi-tenant, AI-powered customer relationship management platform. It brings together contact, account, lead, and opportunity management with AI assistants, AI telephony, and automation. Aisha is designed to be performant, secure, and resilient — even if external services are down, an independent backend ensures your work can continue.

## What Makes Aisha CRM Different

- AI Executive Assistant with deep CRM context
- AI telephony: transcribed calls, AI notes, auto follow-ups
- AI campaigns: at-scale outreach with personalized content
- Independent backend with automatic failover for zero downtime
- Supabase-backed data with row-level security (RLS)
- Clear tenant isolation — UUID-first design for data safety

## System Requirements (End Users)

- Modern browser: Chrome, Edge, or Firefox (latest two versions)
- Recommended screen width ≥ 1280px for best layout
- Reliable internet connection (>5 Mbps)

> Note: Mobile devices are supported for basic workflows. For admin tasks and data-intensive views, a desktop browser is recommended.

## Roles and Access

- Employee: Access to own/assigned records
- Manager: Tenant-wide visibility and reporting
- Admin: Tenant configuration and user management
- Superadmin: System-level configuration (Aisha platform)

# Chapter 2: Getting Started

## First Login and Profile Setup

1. Open the app: `http://localhost:4000` (Docker dev)
2. Sign in with your email; if invited, complete signup via the link
3. Go to Profile Settings → Update your name, phone, department, and avatar
4. Preferences → Set timezone, date/time format, and week start day

> Tip: A correct timezone ensures activities and reminders align with your calendar.

## Navigation Basics

- Left navigation menu provides access to modules: Dashboard, Contacts, Accounts, Leads, Opportunities, Activities, Reports, AI, etc.
- The header hosts global search, quick actions, and your profile menu.
- Many lists support column configuration, sorting, filtering, and pagination.

## Using Global Search

Use the search bar to find contacts, accounts, leads, or opportunities by name, email, phone, or tags. Advanced filters are available per module.

## Quick Start Tasks

- Create your first contact (Chapter 4)
- Import a CSV of leads (Chapter 6)
- Explore the dashboard widgets (Chapter 3)
- Try the AI Assistant to query your tenant’s data (Chapter 3)

# Chapter 3: Core Features Overview

## Dashboard

The dashboard surfaces high-value information:

- Metrics: contacts, leads, opportunities, pipeline value
- Charts: lead sources, pipeline by stage, activity trends
- Widgets: recent activities, upcoming tasks, alerts

> Best Practice: Review your dashboard each morning and at day’s end.

## AI Executive Assistant

- Ask natural-language questions: “Show high-value opportunities closing this month.”
- Create records: “Add a call with John for tomorrow at 10am.”
- Update data: “Change opportunity ‘Acme Renewal’ to Negotiation.”
- Analyze: “Summarize my team’s activity this week.”

Privacy and safety: The assistant enforces role-based access and tenant isolation.

## Calendar Integration (In-App)

- View activities by month, week, day, or agenda.
- Drag-and-drop to reschedule; set reminders and priorities.
- External sync (Google/Outlook) is planned; use in-app calendar for now.

## Search and Filters

- Module lists feature saved filters, tag filters, owner filters, and date range filters.
- Combine filters to narrow large datasets quickly.

# Chapter 4: Contact Management

Contacts are individuals you interact with. They can be linked to an Account and to activities, opportunities, and notes.

## Creating Contacts

1. Contacts → "+ Add Contact"
2. Enter First Name and Last Name (required)
3. Add email, phone, job title, department
4. Link to an existing Account or create a new one
5. Assign an owner and add tags
6. Save

## Importing Contacts (CSV)

1. Contacts → Import
2. Upload CSV (UTF-8, headers on row 1)
3. Map columns to fields (email, phone, etc.)
4. Validate preview; resolve duplicates
5. Start import and monitor progress

> Tip: Standardize phone and email formats before import to improve match quality.

## Working with Contacts

- Timeline: see activities, notes, and interactions
- Quick actions: call, email, schedule, log activity
- Tags: segment for campaigns or follow-ups

## Bulk Operations

- Select multiple contacts → Bulk actions: tag, assign, export, delete
- Safeguards prevent accidental bulk deletions

## Best Practices

- Link every contact to an account where possible
- Capture notes after each interaction
- Use meaningful tags (e.g., VIP, Prospect, Partner)

# Chapter 5: Account Management

Accounts represent companies or organizations.

## Creating Accounts

1. Accounts → “+ Add Account”
2. Provide company name (required), website, phone, industry
3. Add address and revenue/employee size if known
4. Assign an owner and tags

## Relationships and Hierarchies

- Link multiple contacts to an account
- Associate opportunities and activities
- Use tags and types (Prospect, Customer, Partner, Competitor)

## Best Practices

- One account per company; avoid duplicates
- Keep account health up to date with notes and activities

# Chapter 6: Lead Management

Leads are pre-qualified prospects. Convert leads once they are sales-ready.

## Creating Leads

1. Leads → "+ Add Lead"
2. Capture first/last name, company, email/phone, source
3. Set priority and status (New, Contacted, Qualified, etc.)

## Lead Scoring

Aisha scores leads 0–100 based on profile completeness, engagement, company fit, and source quality. Use the score to triage outreach.

## Converting Leads

When a lead is qualified:

- Convert to Contact
- Create or link Account
- Create Opportunity with stage and value

All history (notes, activities) is preserved.

## Best Practices

- Qualify quickly and consistently
- Keep source data clean for ROI reporting

# Chapter 7: Opportunity Management

Opportunities represent potential deals.

## Stages and Pipeline

- Prospecting → Qualification → Proposal → Negotiation → Closed Won/Lost
- Configure probability per stage for weighted forecasts

## Creating Opportunities

1. Opportunities → "+ Add Opportunity"
2. Provide name, amount, expected close date (required)
3. Link Account and primary Contact
4. Choose stage and probability
5. Add next steps

## Kanban and List Views

- Use Kanban to drag-and-drop across stages
- List view supports sorting and filtering by owner, stage, amount, date

## Best Practices

- Keep stages current; stale stages distort forecasts
- Document next steps and set an owner for every deal

# Chapter 8: Activities and Tasks

Activities help you drive work forward: calls, emails, meetings, tasks, notes, demos, proposals, and AI-driven activities.

## Creating Activities

1. “+ Add Activity”
2. Select type (Call, Email, Meeting, Task, etc.)
3. Provide subject, description, due date/time, priority
4. Link to Contact/Account/Lead/Opportunity

## Managing Activities

- Statuses: Scheduled, In Progress, Completed, Cancelled, Failed
- Priorities: Low, Normal, High, Urgent
- Calendar: drag-and-drop to reschedule

## AI-Powered Activities

- Scheduled AI Calls: configure script/prompt and objectives
- Scheduled AI Emails: context-aware, personalized drafts

## Best Practices

- Log every meaningful interaction
- Use reminders for time-sensitive tasks

# Chapter 9: AI Telephony & Call Management

Aisha integrates with telephony providers to log calls, transcribe audio, generate AI notes, and create follow-ups.

## Core Capabilities

- Automatic call logging with timestamps and participants
- AI-generated summaries and action items
- Outcome tracking (Connected, Voicemail, No Answer, etc.)
- Link calls to contacts, leads, opportunities, and accounts

## Typical Workflow

1. Place or receive a call via your provider or softphone
2. Aisha logs the call and processes audio (if available)
3. Review the AI summary; adjust as needed
4. Create follow-up tasks automatically

## Best Practices

- Confirm sensitive details in summaries before sharing
- Use consistent naming for call outcomes to keep analytics clean

# Chapter 10: AI Campaigns

Run at-scale outreach while keeping messages personal.

## Creating a Campaign

1. AI Campaigns → “+ New Campaign”
2. Choose type (Calls, Emails)
3. Define target audience (tags, filters, lists)
4. Write or customize AI prompt/templates
5. Set schedule, throttling, and retries
6. Launch and monitor progress

## Tracking & Metrics

- Attempts, connects, replies, bounces
- Outcome breakdown and conversion rates
- Per-contact activity history

## Compliance and Safety

- Always honor opt-outs and local regulations
- Keep prompts factual and on-brand

# Chapter 11: Reports & Analytics

Understand your business with built-in reports and exports.

## Standard Dashboards

- Overview: KPIs, activity volume, trends
- Sales: pipeline by stage, win rate, deal size, velocity
- Leads: source performance, conversion, aging
- Productivity: completion rates, overdue items

## Exporting

- PDF exports for presentations
- CSV exports for analysis in BI tools

## Best Practices

- Review weekly with your team
- Align definitions (e.g., what qualifies as a lead?)

# Chapter 12: Workflows & Automation

Automate repetitive steps to ensure consistency and speed.

## Concepts

- Triggers: events that start workflows (record created/updated, status change)
- Actions: what a workflow does (create task, send email via integration, update field)
- Conditions: gates that must pass

## Example: Lead → Qualified

When a lead becomes Qualified:

1. Create a follow-up task for owner in 2 days
2. Create an Opportunity with default stage
3. Notify manager via email/webhook

## Best Practices

- Start simple; monitor outcomes; iterate
- Keep a runbook documenting each workflow

# Chapter 13: Advanced Features

## Document Processing

- Upload receipts and business documents
- AI extracts merchant, totals, dates, line items
- Create cash flow transactions directly from documents

## Email Integration (Webhook-Based)

- Use n8n/Make/Zapier to send emails triggered by CRM events
- Maintain templates with merge fields

## Business Card Scanner

- Upload a photo or scan
- AI extracts contact details; review and save as Contact

## Duplicate Detection & Merge

- Find duplicates in Contacts, Accounts, Leads
- Merge records safely; activities and relationships are preserved

# Chapter 14: Troubleshooting

## Common Issues

- Can’t log in: Confirm invite accepted and user is active
- Missing data: Check filters or ownership/role restrictions
- API errors: Retry; if persistent, contact support with timestamp and action
- PDF won’t download: Ensure backend at `http://localhost:4001` is reachable

## Diagnostic Tools

- Status page: `/api/status` (backend 4001)
- Health: `/health`
- Logs: Ask your admin to check backend logs and performance metrics

## Getting Help

- In-app AI Assistant for quick answers
- Email support: `support@ai-sha.com`

# Appendix A: Keyboard Shortcuts

- N: New record in current module
- T: Jump to Today (calendar)
- Arrow Left/Right: Navigate periods
- M/W/D: Month/Week/Day views
- Ctrl/⌘+K: Global command/search palette (if enabled)

# Appendix B: Glossary

- Account: A company or organization you do business with
- Contact: An individual person (often linked to an Account)
- Lead: A pre-qualified prospect not yet converted
- Opportunity: A potential deal with value and stage
- Activity: A call, email, meeting, task, or note linked to records
- Owner: The employee responsible for a record

# Appendix C: FAQ

**Q: How do I invite a teammate?**

A: An Admin can invite users via Settings → User Management → "+ Invite User".

**Q: Can I export my data?**

A: Yes. Use Reports for PDFs and module-level exports for CSVs. Admins can request full tenant exports.

**Q: How do AI calls handle consent?**

A: Configure campaigns and prompts to comply with local regulations and opt-out requirements. Always honor do-not-contact lists.

---

## Quick Start Checklists

**New Users**

1. Complete profile and preferences
2. Learn dashboard widgets
3. Create a contact and log an activity
4. Try the AI Assistant
5. Review calendar

**Sales Teams**

1. Import contacts or leads
2. Define stages and probabilities
3. Create opportunities and set next steps
4. Track activities daily
5. Review pipeline weekly

**Managers**

1. Configure roles, permissions, and modules
2. Define workflows for repeatable steps
3. Build custom filters and saved views
4. Use dashboards to monitor KPIs
5. Launch AI campaigns for outreach

---

For additional guidance, contact support or check the Admin Guide for tenant-level configuration.