

HAIROTICMEN - Full Monday Setup Map

Workspaces & Boards

1. CRM Workspace:

- Active Customers (New Signups, Active Members, VIP Customers)
- Customer Messages (Website Inquiries, WhatsApp, Complaints)
- Customized Offer Programs
- Follow-Up Tasks
- CRM Overview Dashboard

2. Sales Workspace:

- Leads Tracker
- Partner Deals
- Commission Records
- Sales Tasks
- Sales Dashboard

3. Inventory:

- Product Catalog
- Stock Levels
- Warehouse Tasks
- Restock Requests
- Inventory Dashboard

4. Shipping:

- Shipping Requests
- DHL Integration
- Internal Driver Tasks
- Return Cases
- Shipping Dashboard

5. Marketing:

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- Campaign Planner
- Social Media Calendar
- Ads Tracker
- Content Approvals
- Marketing Dashboard

6. Partners & Affiliates:

- Registered Partners
- Stand Requests
- Affiliate Signups
- Commission Tracker
- Partner Portal Dashboard

7. Loyalty Program:

- Points Ledger
- Redemption Requests
- VIP Tiers
- Customer Progress Tracker
- Loyalty Dashboard

8. Management HQ:

- Finance & Accounting
- HR Tasks
- Internal Announcements
- CEO Weekly Briefs
- Executive Dashboard

Board Connections

- Customer Messages -> Active Customers
- Follow-Up Tasks -> Active Customers

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- Customized Offers -> Active Customers
- Loyalty -> Active Customers
- Sales Leads -> Active Customers

Automation & Integration

Zapier:

- Contact Form -> Customer Messages
- WhatsApp Bot -> Customer Messages
- Loyalty Sign-Up -> Active Customers

GPT Assistant:

- Reads from CRM Dashboard
- Suggests Offers / Tasks
- Supports live reporting