



SuiteDash For-Dummies Guide

Purpose: This guide is written for novices who want to build an entire business workflow system in SuiteDash. It walks you through every step, from setting up your account and creating custom fields to building pipelines and automations. Each section is beginner-friendly and includes tips for testing your work.

1. Getting Started

1.1 What is SuiteDash?

SuiteDash is an all-in-one business platform that combines CRM (Customer Relationship Management), project management, invoicing, file sharing, and automations. It lets you replace multiple tools with one cohesive system.

1.2 Accessing your account

1. Open your web browser and go to your SuiteDash login URL (e.g., <https://portal.instaxis.com>).
2. Enter your username and password, then click **Login**.
3. You will see the **Dashboard**, a snapshot of tasks, projects, and notifications.

1.3 Understanding the navigation

- **Flyout Menu:** Click the profile icon (or company logo) at the top-right corner to access account settings, organization settings, custom fields, and white-label options.
- **Left Sidebar:** Gives you quick access to CRM, Projects, Office (invoicing), Automations, Forms, and other modules.
- **Top Menu:** When you're inside a module (like CRM), tabs appear along the top (e.g., Deals, Pipelines, Companies).

2. Preparing Your Workspace

2.1 Apply white-label branding

1. From the Flyout menu, choose **White Label Branding**.
2. Upload your company logo and favicon.
3. Set your brand colors and save.
4. Add a custom domain (optional) so clients see your own URL.

2.2 Set up your team

1. In the Flyout menu, choose **Staff & Team**.

2. Click **+ Add Staff** and enter names and emails for your team members.
3. Assign roles (e.g., Admin, Project Manager). Each role defines what they can see and do.
4. Send invites. Your team members will receive emails with login instructions.

2.3 Import or add clients

1. Go to **CRM → Contacts**.
2. Click **+ Add Contact** to manually add a client or **Import Contacts** to upload a CSV file.
3. Fill in basic details (name, email) and assign them to appropriate circles (e.g., Prospects, Clients).

3. Building Your Data Structure

Custom fields allow you to capture information that isn't provided by default (like pain points or demo dates). They appear on contact profiles, forms, and can be used in automations.

3.1 Create custom fields

1. Open the Flyout menu and select **Custom Fields**.
2. Click the **Manage Custom Fields** tab.
3. Press **+ Add Custom Field**.
4. Enter:
 5. **Field Name:** a short internal name (e.g., `Dream_Outcome_Score`). The client won't see this.
 6. **Description:** what you want the client or user to enter (e.g., *"Enter the Dream Outcome Score (1-10)"*).
 7. **Usage:** choose **CRM → Target** (this makes the field appear for both Contacts and Companies).
 8. **Type:** choose how data is captured. For scores or numbers, select **Number**; for paragraphs, select **Multi-Line Text Area**; for dates, choose **Date**; and for formulas choose **Calculating**.
 9. Click **Add** to save.

Recommended fields for the Hormozi & CLOSER models

- **Dream_Outcome_Score** (Number) – How big is the prospect's desired outcome?
- **Likelihood_Score** (Number) – How confident is the prospect in achieving it?
- **Time_Delay_Days** (Number) – How many days will it take to get results?
- **Effort_Score** (Number) – How much effort does the prospect expect to put in?
- **Calculated_Value** (Calculating) – Use the formula `({{Dream_Outcome_Score}} * {{Likelihood_Score}}) / ({{Time_Delay_Days}} * {{Effort_Score}})` to produce a single value score.
- **Primary_Pain_Point** (Multi-Line Text Area) – Main problem the prospect wants to solve.
- **Desired_Outcome** (Multi-Line Text Area) – What the prospect wants to achieve.
- **Problem_Label** (Single-Line Text) – A short label summarizing the problem.
- **Impact_Level** (Number) – On a scale of 1-10, how big is the impact if solved?
- **Previous_Solutions_Tried** (Multi-Line Text Area) – List previous solutions tried.
- **Failure_Reasons** (Multi-Line Text Area) – Why did those solutions fail?
- **Demo_Date** (Date) – When you plan or performed a demo.
- **Stakeholders_Present** (Multi-Line Text Area) – Names/roles at the demo.
- **Objections_Raised** (Multi-Line Text Area) – All objections or concerns.
- **Responses_Given** (Multi-Line Text Area) – How you answered those objections.
- **Decision_Factors** (Multi-Line Text Area) – Key factors influencing their decision.

- **Close_Date** (Date) – When the deal closed.

These fields capture the information you need to score prospects and move them through your sales process.

4. Creating Your Sales Pipeline (CLOSER Framework)

A pipeline is a visual representation of your sales process. Each stage corresponds to a step in Alex Hormozi's CLOSER framework.

4.1 Add the pipeline

1. Go to **CRM → Deals**. You'll land on the Deals page.
2. Click **Pipelines** in the top menu.
3. Press **+ Add Pipeline**.
4. Give your pipeline a name (e.g., *CLOSER Sales Process*), select your currency, and toggle **Probability ON**. Click **Save**.

4.2 Define the stages

1. In the Pipelines list, find your new pipeline. Click the three dots (options) and choose **Manage Stages**.
2. SuiteDash creates default stages. Rename them by typing into the **Title** field.
3. Use the **+** button to add new stages or delete ones you don't need. Reorder by dragging them.
4. Set the probability for each stage. For example:
5. **Clarify** – 10 %
6. **Label** – 20 %
7. **Overview** – 35 %
8. **Sell** – 50 %
9. **Explain** – 70 %
10. **Reinforce** – 90 %
11. Click **Save** at the top right of the stage editor.

4.3 Add stage requirements

1. While still in **Manage Stages**, hover over a stage and click the **gear** (Automation) icon.
2. A modal appears with two tabs: **On Stage Entry** and **On Stage Exit**. Use the **On Entry** tab to add required fields and automations before a deal can move forward.
3. For example:
4. **Clarify stage**: require **Primary_Pain_Point** and **Desired_Outcome**.
5. **Label stage**: require **Problem_Label** and **Impact_Level**.
6. **Overview stage**: require **Previous_Solutions_Tried** and **Failure_Reasons**.
7. **Sell stage**: require **Demo_Date** and **Stakeholders_Present**.
8. Click **Save** in the modal.

4.4 Build stage automations (optional but powerful)

1. In the same modal, click **+ Add Automation** under *On Stage Entry* or *On Stage Exit*.

2. Select an automation type, such as **Send Email**, **Create Task**, or **Call Webhook**. Configure details: recipients, subject lines, or webhook URL.
3. For instance:
 4. When a deal enters **Sell**, send an email with meeting recap.
 5. When a deal exits **Sell**, create a proposal or invoice.
 6. Save each automation before closing.

5. Automations and Auto-Templates

Automations automate routine actions like sending emails, updating fields, or generating invoices. Auto-Templates bundle several automation steps together and can be reused.

5.1 Build an auto-template

1. Click **Automations** in the left sidebar, then **Auto-Templates**.
2. Press **+ Add Auto-Template**, then **Start Creating Auto-Template**.
3. Enter a title (e.g., *New Client Onboarding - AI*).
4. Click **+** to add automation steps. A modal shows all available actions. Examples:
 5. **Send Portal Invitation** – invites a new client to your portal.
 6. **Send Email** – send a welcome email with dynamic placeholders like `{{FirstName}}` .
 7. **Set Custom Field Value** – update a field when a specific event occurs.
 8. **Call Webhook** – trigger external tools (like Activepieces or Zapier).
9. After adding the automations you need, click the **Save icon**. Your template appears in the list.

5.2 Apply trigger logic

1. In the Auto-Templates list, click **Trigger Logic** for your template.
2. Use the IF/THEN builder to define when the template should run. For example:
 3. **IF Calculated_Value ≥ 4 THEN** run the high-value sequence.
 4. **IF Calculated_Value < 4 THEN** run the low-value sequence.
5. You can limit triggers to specific circles or contacts or set recurring schedules.
6. Save your logic.

5.3 Attach auto-templates to events

- In areas where automations are allowed (CRM, Projects, Invoices), click **+ Configure Automations**. Select your auto-template from the dropdown and save.
- For example, configure **Contact Created** in the CRM so that when a new contact is added, your *New Client Onboarding* template runs automatically.

6. Advanced Integrations (Optional)

SuiteDash can't perform every action natively (e.g., conditional circle assignment on a Calculating field). To extend functionality:

1. **Use webhooks** – Add a **Call Webhook** action in your automation. Enter the URL of an integration platform (e.g., n8n, Activepieces, or Zapier).

2. **External logic** – In that platform, parse the webhook payload. Check the `Calculated_Value` and call the SuiteDash API to assign the client to the appropriate circle. You can also trigger other AI tools (e.g., send a personalized video via Vadoo).

7. Testing Your Setup

Testing ensures that your system works as expected. Use a dummy contact and follow these steps:

7.1 Test custom fields

1. Create a new contact and fill in all custom fields. Verify that the `Calculated_Value` updates automatically when you change the scores.
2. Edit the contact to make sure all fields are visible and can be updated by staff.

7.2 Test pipeline movement

1. Add a new deal for your test contact and select the **CLOSER Sales Process** pipeline.
2. Move the deal through each stage manually. Check that:
3. Required fields must be filled before moving to the next stage.
4. Stage entry/exit automations fire properly (emails are sent, tasks appear).
5. Adjust probabilities or required fields if something feels wrong.

7.3 Test automation templates

1. Trigger the *New Client Onboarding* template by adding another contact. Confirm that the portal invite and welcome email arrive.
2. Change the contact's score to trigger the *Value Equation Calculator* template. Verify that the internal email is sent or the webhook fires.
3. Use the automation logs (found in the Automations module) to diagnose any failures.

7.4 Test external integrations (if used)

1. Send test webhooks from SuiteDash and ensure your external automation platform receives them.
2. Confirm that external actions (e.g. circle assignments) occur based on the conditions you set.
3. Review error logs in your integration tool if something doesn't work.

8. Tips for Success

- **Keep descriptions clear:** Your future self and new team members will appreciate descriptive field names, task titles, and automation notes.
- **Start simple:** Build the pipeline and a few automations first. Once you're confident, expand with more conditions, stages, and integrations.
- **Version control:** Document any changes you make (date, why, who) in a separate note or document. This helps with auditing and troubleshooting.
- **Duplicate to other niches:** The same framework can be cloned for other industries. Just copy the pipeline, rename stages, and adjust fields/automations.

Conclusion

By following this guide, even a novice can set up a sophisticated SuiteDash workspace that captures client data, scores prospects using Alex Hormoz's value equation, moves deals through the CLOSER pipeline, and automates communication and tasks. With proper testing and iteration, you'll have a repeatable system you can deploy across different business niches.
