Novi - User Manual

Novi
Smart Commerce Suite

Novi User Manual

Your complete guide to smart commerce on WhatsApp

Ø=ÜÖ Welcome to Novi

Welcome to Novi, your smart commerce suite designed to transform your WhatsApp business. This manual will guide you through every feature and help you get the most out of your Novi experience.

What You'll Learn:

- How to set up your Novi account
- Managing orders and deliveries
- Using the dashboard effectively
- Customizing your business settings
- Troubleshooting common issues

Ø=Þ€ Getting Started

Creating Your Account

- Visit the Novi Website
- Go to www.novi.com
- Click "Get Started" or "Sign Up"
- Complete Registration
- Enter your business name
- Provide your WhatsApp number
- Choose a secure password
- Verify your email address
- Set Up Your Business
- Add your business details
- Configure your business settings
- Set up your first WhatsApp group

First-Time Setup Checklist

- Account created and verified
- Business profile completed
- WhatsApp number connected
- First group configured
- Team members invited (if applicable)
- Order templates customized
- Test order processed

Ø=Üñ Dashboard Overview

Main Dashboard Features

The Novi dashboard is your command center for all business operations. Here's what you'll find:

Ø=ÜÊ Key Metrics Panel

- Today's Orders: Real-time count of new orders
- Pending Deliveries: Orders awaiting delivery
- Revenue Today: Total sales for the current day
- Active Customers: Number of unique customers today

Ø=ÜË Quick Actions

- New Order: Manually create an order
- Add Customer: Register a new customer
- Export Data: Download reports
- Settings: Access configuration options

Ø=ÜÈ Recent Activity

- Latest orders and updates
- Customer interactions
- System notifications
- Delivery status changes

Navigation Menu

- Dashboard: Main overview and metrics
- Orders: Manage all orders
- Customers: Customer database
- Deliveries: Delivery management
- Reports: Analytics and insights
- Settings: Business configuration
- Support: Help and resources

Ø=ÜË Order Management

Understanding Orders

Orders in Novi are automatically created from WhatsApp messages. Each order contains:

- Customer Information: Name, phone, address
- Order Details: Items, quantities, special requests
- Status: Pending, Processing, Delivered, Cancelled
- Timestamps: Created, updated, delivered times
- Notes: Internal comments and customer requests

Order Statuses

- Ø=Ý Pending
- Order received, awaiting review
- Customer notified of receipt
- Ready for processing
- &™þ Processing
- Order confirmed and being prepared
- Customer updated on progress
- Delivery being arranged
- Ø=Þš Out for Delivery
- Order assigned to delivery person
- Customer tracking updates enabled
- Real-time location sharing (if enabled)
- ' Delivered
- Order successfully completed
- Customer satisfaction recorded
- Order archived
- 'L Cancelled
- Order cancelled by customer or business
- Reason recorded
- Customer notified

Managing Orders

Viewing Orders

- Navigate to Orders in the main menu
- Use filters to find specific orders:
- Date range
- Status
- Customer name
- Order amount

Updating Order Status

- Click on any order to open details
- Select the new status from the dropdown

- Add any relevant notes
- Save changes

Adding Notes

- Use notes for internal communication
- Include special instructions
- Record customer preferences
- Track delivery issues

Order Templates

Create templates for common order types:

- Go to Settings > Order Templates
- Create New Template:
- Template name
- Default items
- Pricing structure
- Special instructions
- Use Templates:
- Quick order creation
- Consistent pricing
- Reduced data entry

Ø=Üe Customer Management

Customer Database

Novi automatically builds your customer database from WhatsApp interactions. Each customer profile includes:

- Basic Info: Name, phone number, email
- Addresses: Delivery locations
- Order History: Complete purchase record
- Preferences: Dietary restrictions, delivery times
- Notes: Special requirements, feedback

Managing Customers

Viewing Customer Profiles

- Go to Customers in the main menu
- Search by name or phone number
- Click on any customer to view full profile

Adding Customer Notes

- Record preferences and special requests
- Track customer feedback
- Note delivery instructions

• Document communication history

Customer Segmentation

  • New Customers: First-time buyers

  • Regular Customers: Repeat business

  • VIP Customers: High-value clients

  • Inactive Customers: No recent orders

Customer Communication

Automated Messages

  • Order confirmations

  • Delivery updates

  • Payment reminders

  • Follow-up messages

Custom Messages

  • Personalized greetings

  • Special offers

  • Holiday wishes

  • Feedback requests

Ø=Þš Delivery Management

Setting Up Delivery

Delivery Groups

  • Create dedicated WhatsApp groups for delivery coordination

  • Add delivery personnel to the group

  • Configure delivery notifications

  • Set up delivery zones and time slots

Delivery Personnel

  • Add Drivers: Name, phone, vehicle info

  • Assign Zones: Geographic areas of responsibility

  • Set Schedules: Working hours and availability

  • Track Performance: Delivery times and success rates

Managing Deliveries

Assigning Orders

  • Select an order ready for delivery

  • Choose available delivery person

  • Set delivery time window

  • Send notification to driver

Tracking Deliveries

- Real-time status updates
- GPS location tracking (if enabled)
- Estimated arrival times
- Delivery confirmation

Delivery Reports

- Daily delivery summaries
- Driver performance metrics
- Delivery time analysis
- Customer satisfaction scores

Delivery Optimization

Route Planning

- Efficient delivery routes
- Multiple order batches
- Traffic considerations
- Fuel cost optimization

Delivery Windows

- Set preferred delivery times
- Customer time preferences
- Business operating hours
- Peak delivery periods

Ø=ÜÊ Reports and Analytics

Business Insights

Novi provides comprehensive analytics to help you understand and grow your business:

Sales Reports

- Daily, weekly, monthly sales
- Revenue trends and patterns
- Peak sales periods
- Product performance

Customer Analytics

- Customer acquisition rates
- Repeat purchase patterns
- Customer lifetime value
- Geographic distribution

Operational Metrics

- Order processing times
- Delivery performance

- Customer satisfaction
- System usage statistics

Exporting Data

Report Types

- Sales Reports: Revenue and order data
- Customer Reports: Customer behavior and demographics
- Delivery Reports: Delivery performance and efficiency
- Custom Reports: User-defined metrics and filters

Export Formats

- PDF: Professional reports for sharing
- Excel: Detailed data for analysis
- CSV: Raw data for external tools
- JSON: API integration format

Data Visualization

Charts and Graphs

- Revenue trends over time
- Order volume patterns
- Customer growth charts
- Delivery performance metrics

Interactive Dashboards

- Real-time data updates
- Drill-down capabilities
- Custom date ranges
- Comparative analysis

&™þ Settings and Configuration

Business Profile

Basic Information

- Business name and description
- Contact information
- Operating hours
- Service areas

Branding

- Upload your logo
- Customize colors
- Set business categories
- Define brand voice

Order Settings

Order Processing

- Auto-confirmation rules
- Payment requirements
- Cancellation policies
- Refund procedures

Notification Settings

- Order confirmations
- Delivery updates
- Payment reminders
- System alerts

User Management

Team Roles

- Owner: Full system access
- Manager: Order and delivery management
- Staff: Basic order processing
- Viewer: Read-only access

Permissions

- Order management
- Customer data access
- Financial information
- System settings

Integration Settings

WhatsApp Configuration

- Business account setup
- Group management
- Message templates
- Auto-replies

Payment Integration

- Payment gateway setup
- Invoice generation
- Receipt customization
- Tax calculations

Ø=Ý' Troubleshooting

Common Issues

Order Not Processing

- Check WhatsApp connection
- Verify group configuration
- Review order format
- Check system status

Delivery Notifications

- Confirm delivery group setup
- Check driver assignments
- Verify notification settings
- Test message delivery

Dashboard Issues

- Clear browser cache
- Check internet connection
- Update browser version
- Contact support

Getting Help

Support Resources

- Help Center: Comprehensive guides and FAQs
- Video Tutorials: Step-by-step instructions
- Community Forum: User discussions and tips
- Live Chat: Real-time assistance

Contact Support

- Email: support@novi.com
- WhatsApp: +1 (555) NOVI-123
- Phone: Available during business hours
- Ticket System: For complex issues

System Requirements

Browser Compatibility

- Chrome (recommended)
- Firefox
- Safari
- Edge

Device Requirements

- Smartphone with WhatsApp
- Computer with internet access
- Stable internet connection
- Modern web browser

Ø<ß⁻ Best Practices

Order Management

- Review orders promptly
- Update status regularly
- Communicate with customers
- Document special requests

Customer Service

- Respond quickly to inquiries
- Personalize communications
- Follow up after delivery
- Collect and act on feedback

Delivery Operations

- Plan routes efficiently
- Communicate with drivers
- Track deliveries closely
- Handle issues promptly

Data Management

- Regular data backups
- Monitor system performance
- Review reports regularly
- Update business information

Ø=ÜÞ Need More Help?

Novi Support Team

We're here to help you succeed with Novi. Contact us anytime:

- Email: support@novi.com
- WhatsApp: +1 (555) NOVI-123
- Website: www.novi.com/support
- Hours: 24/7 support available

Training and Onboarding

- Free setup assistance
- Personalized training sessions
- Ongoing support
- Regular feature updates

Thank you for choosing Novi!

Your partner for smart, seamless commerce on WhatsApp