nexora
FIN

PRODUCT DOCUMENTATION

Nexora CRM User Manual

Staff and administrator guide

Use this guide to manage CRM records, sales documents, work, voice calls and AI workflows. The administration chapters cover provider connections, access, reporting and CRM settings.

Screenshots use fictional records from a training workspace. Numbered arrows point to controls named below each image. Features and controls depend on the user role, installed modules and provider connections.

Online manual in English

Online manual in Arabic

Edition 08 November 2026

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01 Getting started

Login and password recovery

Open Workspace login, enter your staff email and password, then choose Login. Use Forgot Password to request a reset for your staff email. After signing in, check that your name and workspace are correct. Use your profile menu to sign out on a shared device.

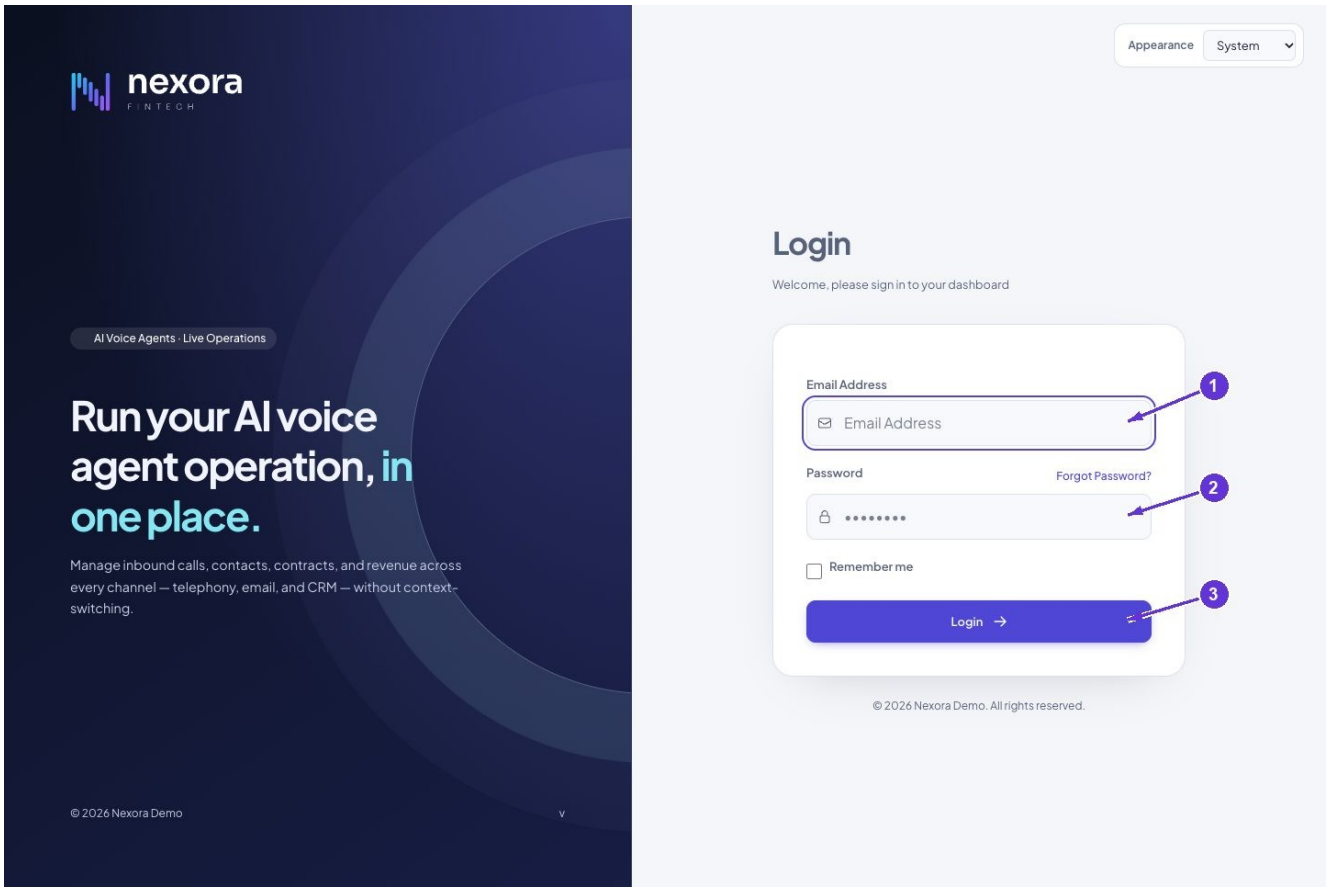


Figure 1 1 Email Address · 2 Password · 3 Login

Open in Nexora CRM

Find a page

Open Find a page in the sidebar or press Ctrl+K (Command+K on macOS). Search by the feature name and open the matching result. Expand the matching sidebar group to see related pages. A missing control can depend on permissions.

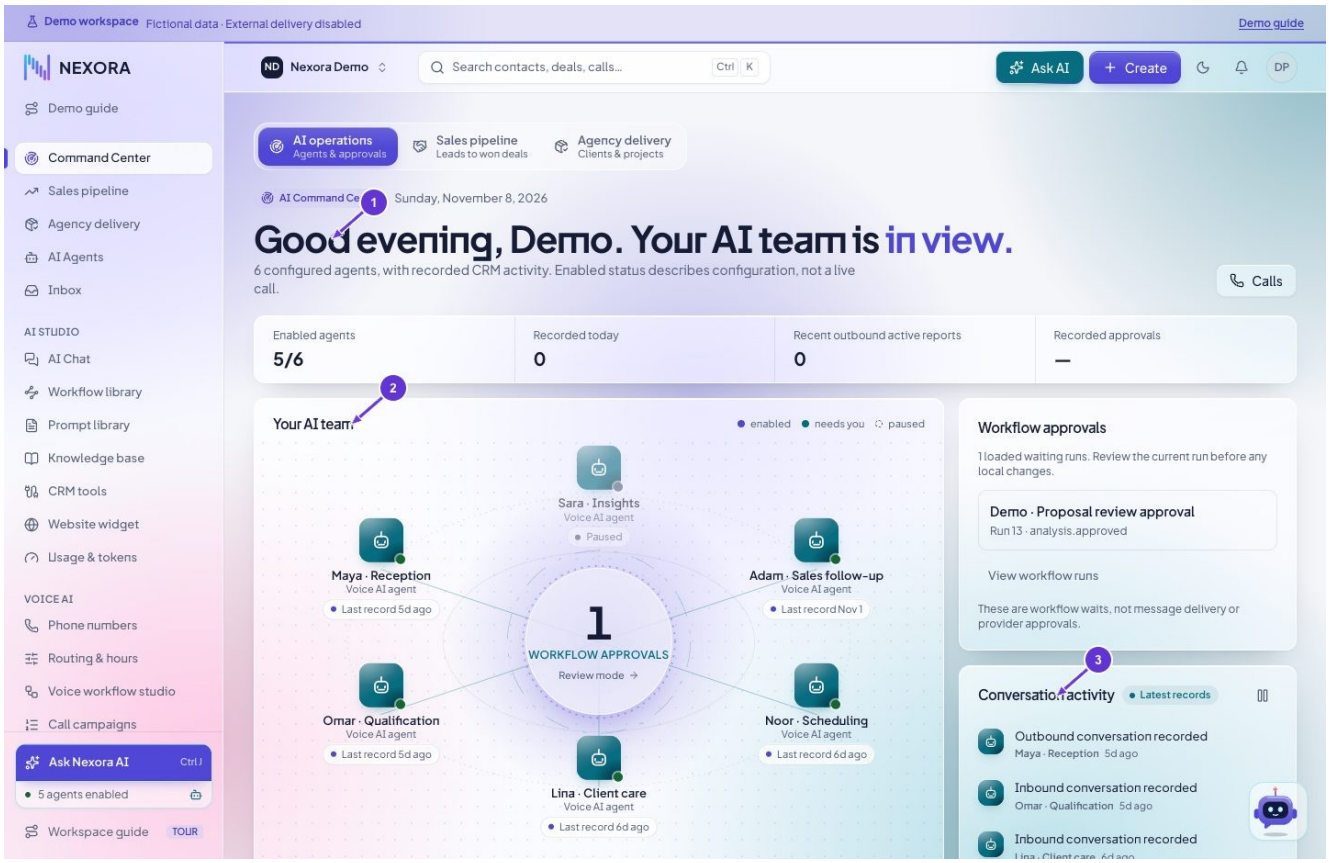


Figure 2 1 Good evening, Demo. Your AI team is in view. · 2 Your AI team · 3 Conversation activity

Open in Nexora CRM

Command Center

Open Command Center for agent activity, workflow approvals and recent conversations. Use Refresh dashboard before interpreting a count. Open a call or workflow to inspect its underlying record. Analyze current snapshot suggests checks from the visible facts.

Open in Nexora CRM

Create edit and review records

Find the record before creating a duplicate. Open the action for the exact row, complete the required fields and save. Reopen the record to verify the result. For exports, confirm the filter and selection. For removal, review related activity, permissions and the confirmation shown by the page.

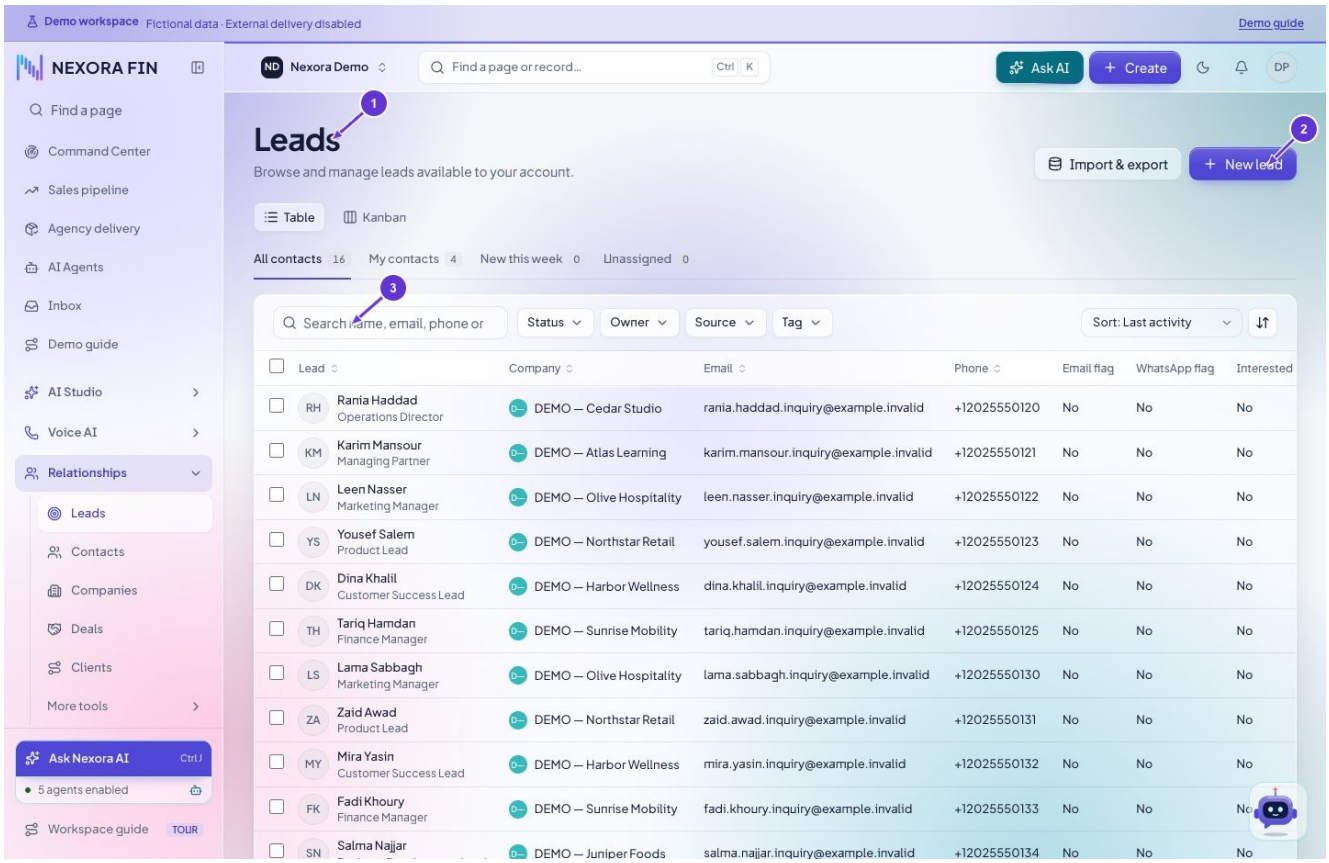


Figure 3 1 Leads · 2 New lead · 3 Search leads

Open in Nexora CRM

Client portal

Sign in with the email linked to your customer contact. Review the projects, documents and support tickets shared with your account. Open the specific invoice, estimate, proposal or contract to see the actions available to you. Use the portal recovery link if you cannot sign in.

Open in Nexora CRM

Resolve missing actions and delayed results

Confirm that you are in the correct workspace and have the right role. If a save or send outcome is uncertain, reopen the same record and check its history before retrying. For voice, compare Call event delivery with the provider and workflow history. For messages, check the delivery state and the configured sender.

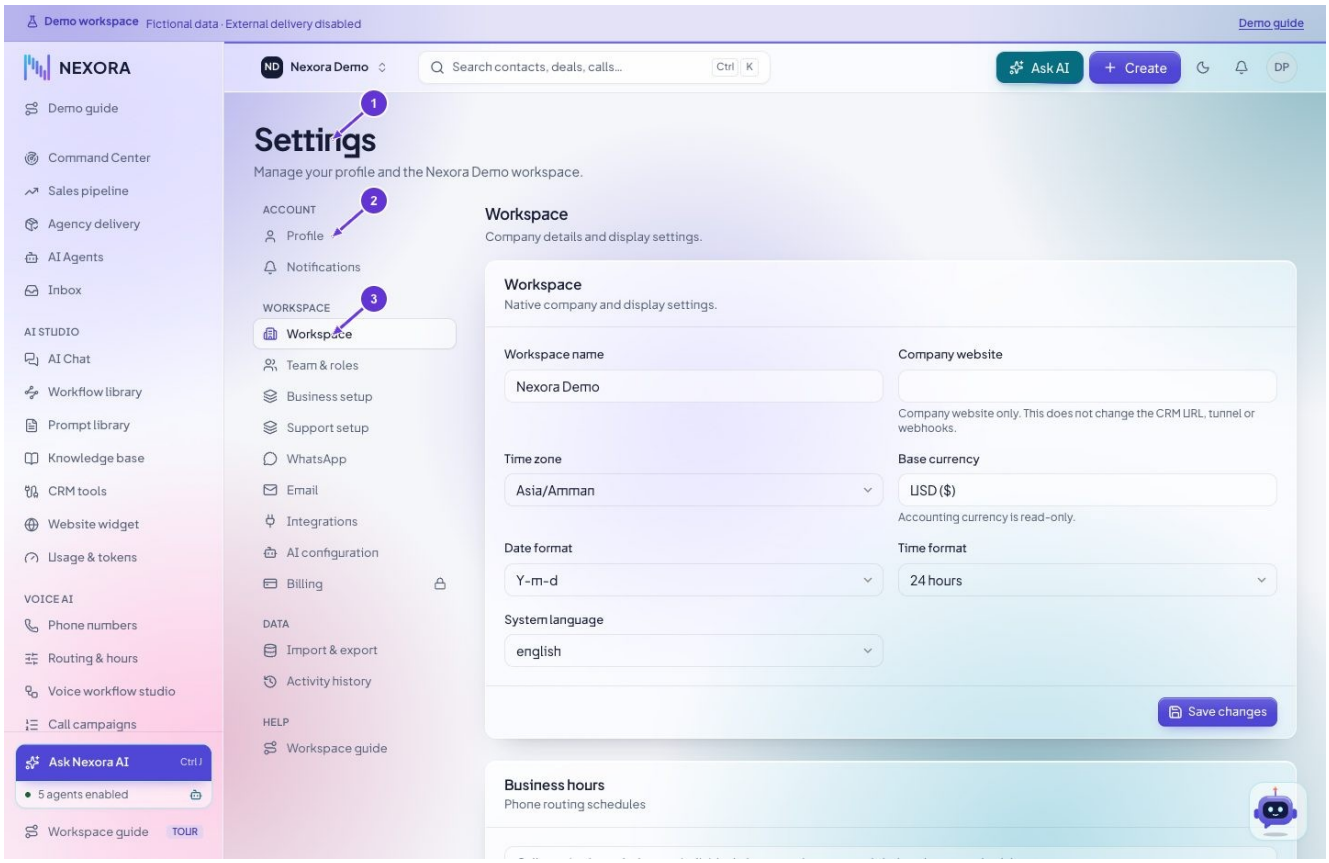


Figure 4 1 Settings · 2 Profile · 3 Workspace

Open in Nexora CRM

Workspace settings

Open Settings and choose the relevant category. If an option is absent or read-only, ask an administrator to review your role and permissions. Sign out using the profile menu to end the session. Never share credentials in AI Chat.

Open in Nexora CRM

Workspace overview

Open the workspace overview for summary metrics. Use the source pages to verify totals, especially if a section shows limited access or missing data.

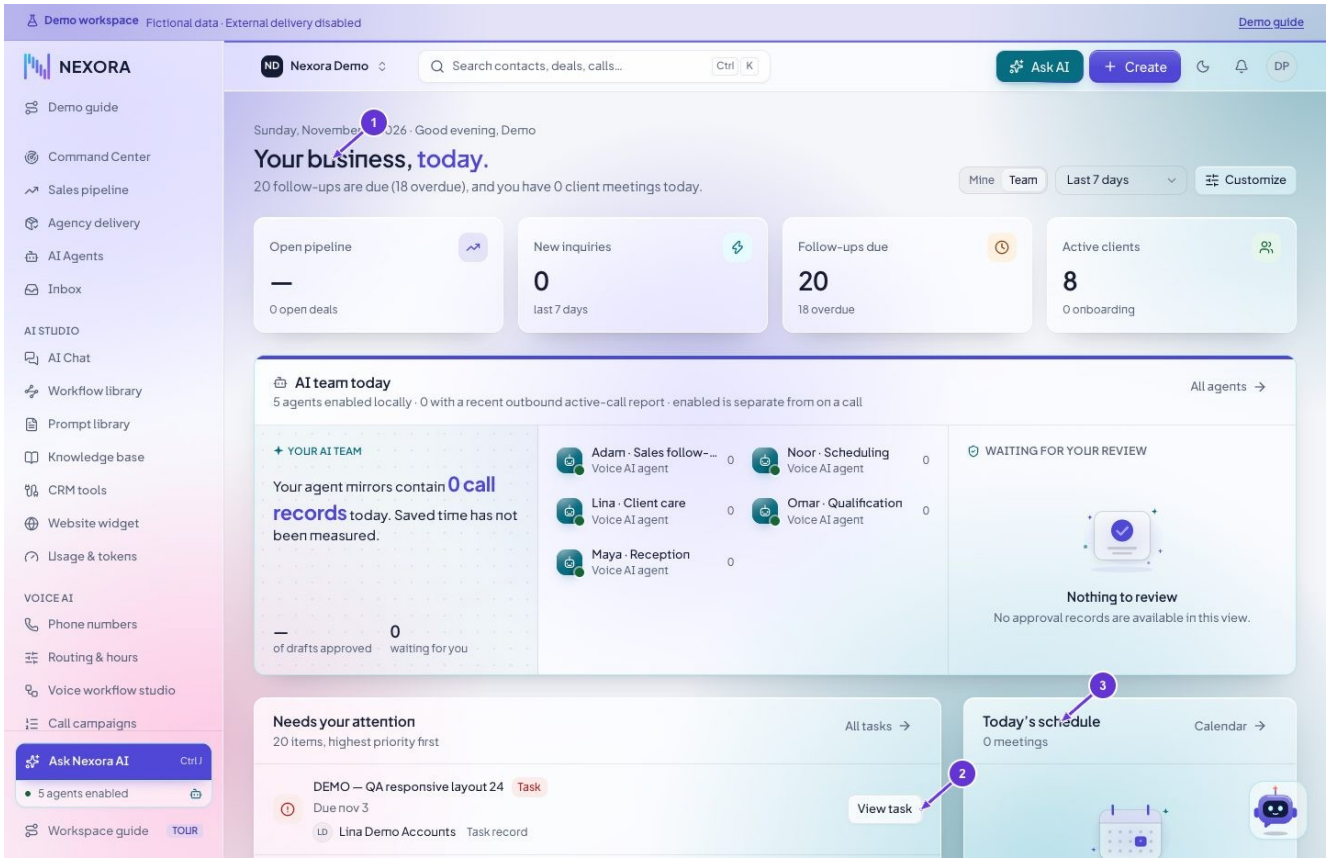


Figure 5 1 Your business, today. · 2 View task · 3 Today's schedule

Open in Nexora CRM

Workspace guide

Open Workspace guide to follow the available walkthroughs, then open the linked pages and complete the relevant setup using your role.

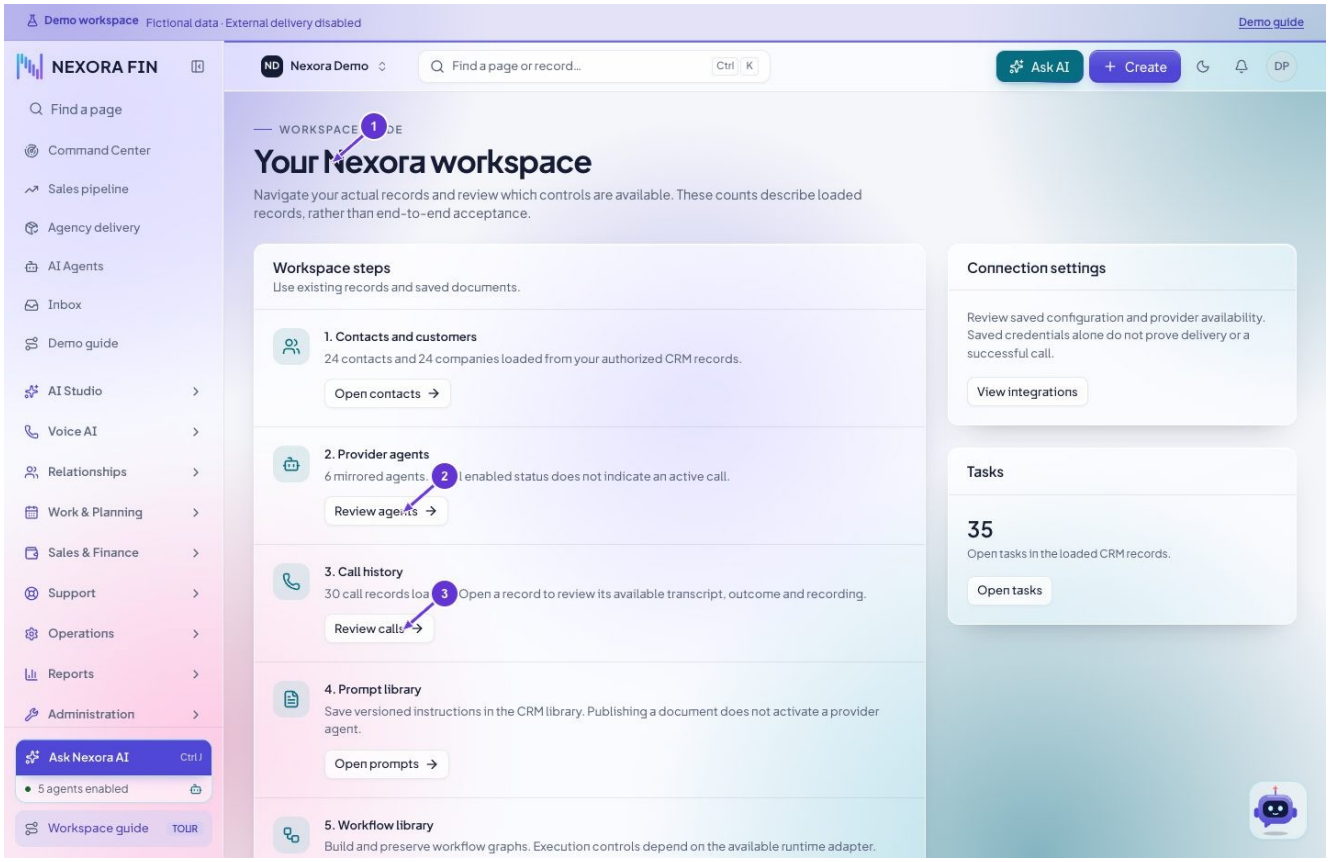


Figure 6 1 Your Nexora workspace · 2 Review agents · 3 Review calls

Open in Nexora CRM

02 Sales and relationships

Sales pipeline

Open Sales pipeline to review stages. Use Deals to find the underlying opportunity, review its owner and current stage, and save any permitted changes on that record. Check the record after a stage change.

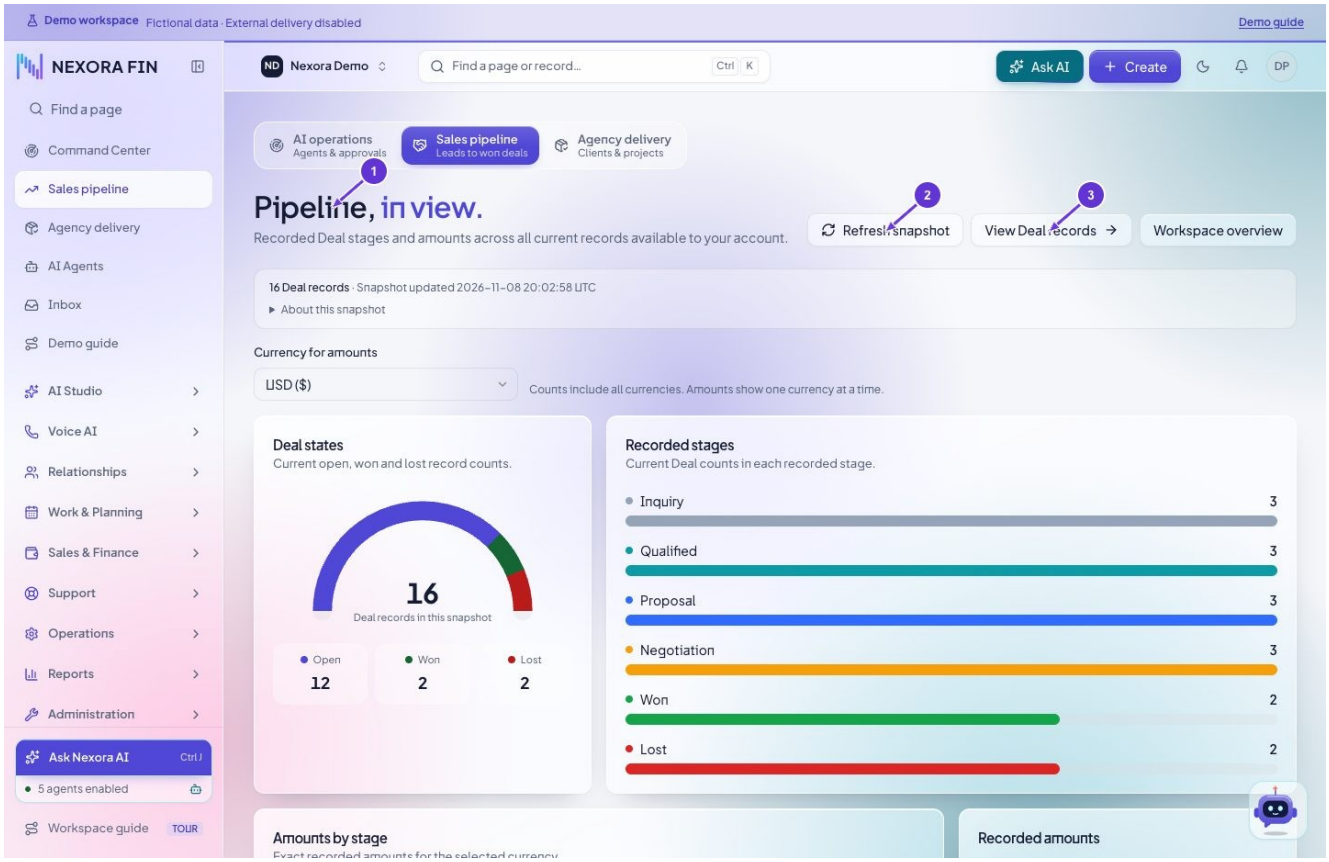


Figure 7 1 Pipeline, in view. · 2 Refresh snapshot · 3 View Deal records

Open in Nexora CRM

Leads

Open Relationships → Leads. Filter or search first to check for an existing lead. Select New lead, fill the required fields, choose source and status if available, and save. Search for the new record and open it to confirm the saved details.

Open in Nexora CRM

Lead details and Kanban

Open the lead from the list or board to review contact information, source, status and related activity. Use Edit to update the record. To move it through the pipeline, confirm the target status in the board or record editor. Before deletion review attached records and dependent activity, then confirm only the intended lead.

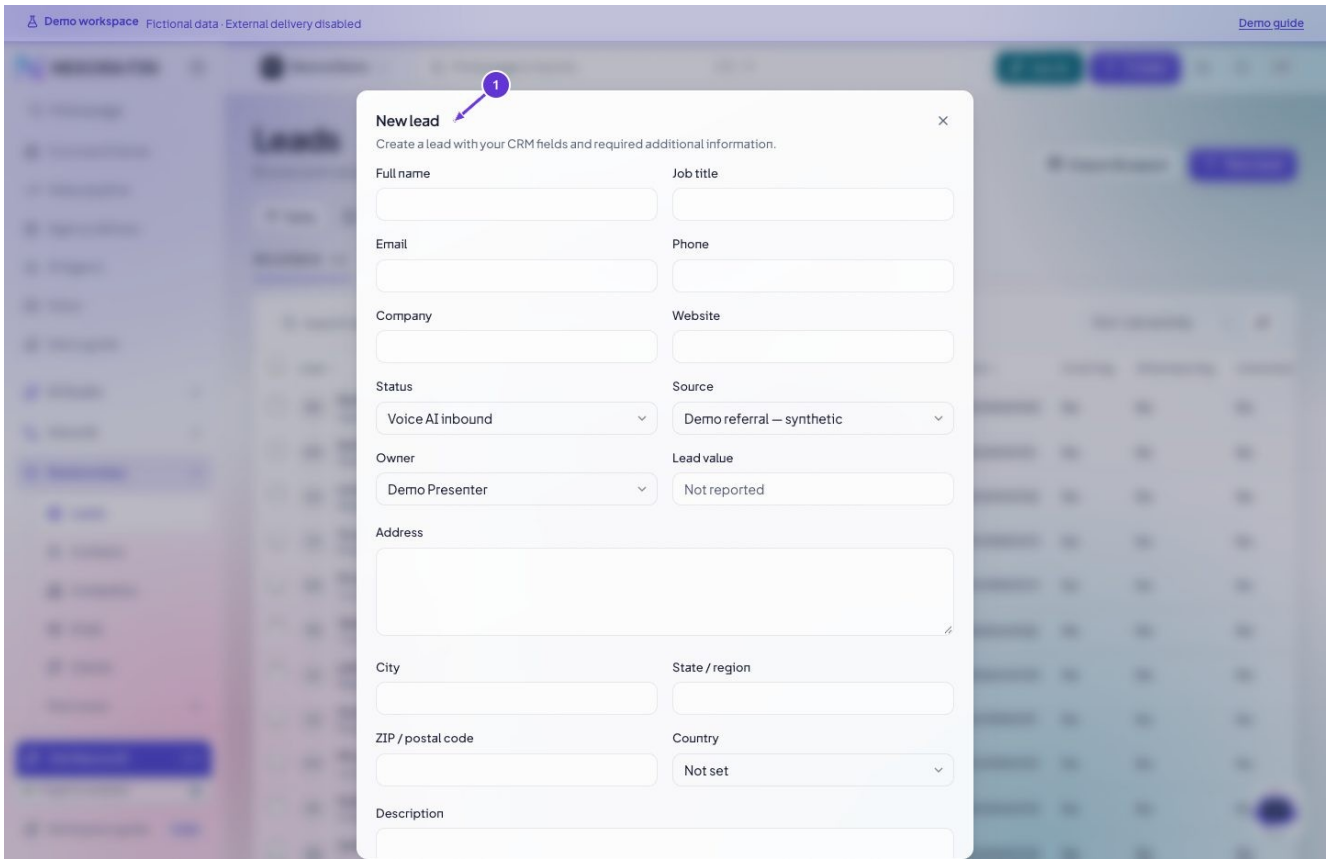


Figure 8 1 New lead

Open in Nexora CRM

Convert a lead

Open Relationships → Leads and select the exact lead. Use the conversion action where available, review the contact and company details, then confirm the resulting customer record.

Open in Nexora CRM

Website demo request intake

Use the public demo form with the intended topic or scenario. After confirmation, open Leads and filter by Website Demo and Demo requested. Open the matching record and check the selected scenario in its description. Assign follow-up or book the meeting from Calendar when appropriate.

Open in Nexora CRM

Contacts

Open Relationships → Contacts. Use filters to distinguish lead records from saved customer contacts. To add a customer contact, open the client and use its contacts controls. Open the saved contact to confirm the email and linked customer.

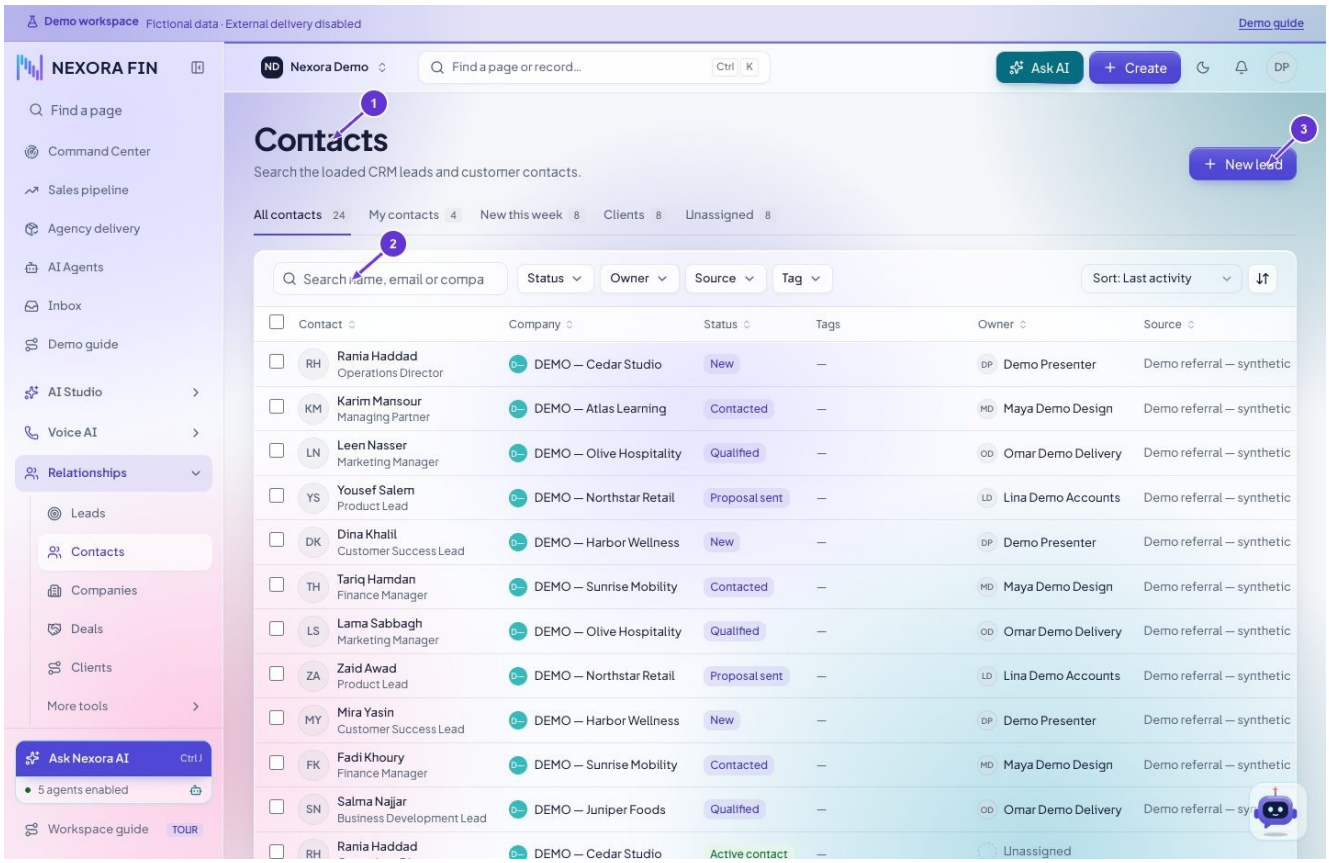


Figure 9 1 Contacts · 2 Search contacts · 3 New lead

Open in Nexora CRM

Clients

Open Relationships → Clients and select the client. Review the overview, contacts and related activity. Use the available Create or Edit controls, then reload the client to verify the saved values.

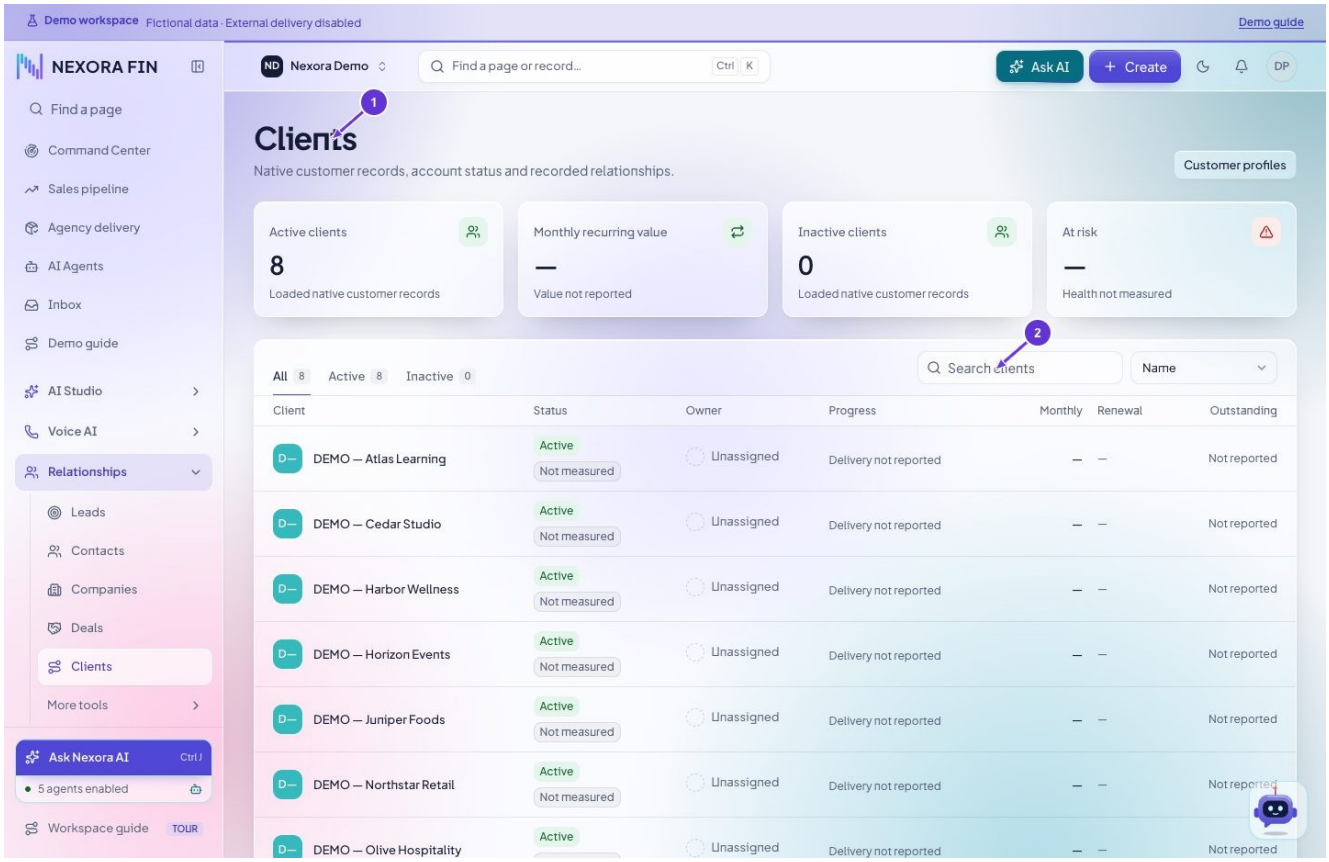


Figure 10 1 Clients · 2 Search clients

Open in Nexora CRM

Deals

Open Relationships → Deals. Choose the create action, link the opportunity to its customer or lead, select a stage and complete the required fields. Save and reopen the deal. In AI Chat, use CRM records and attach the deal to ask about that record.

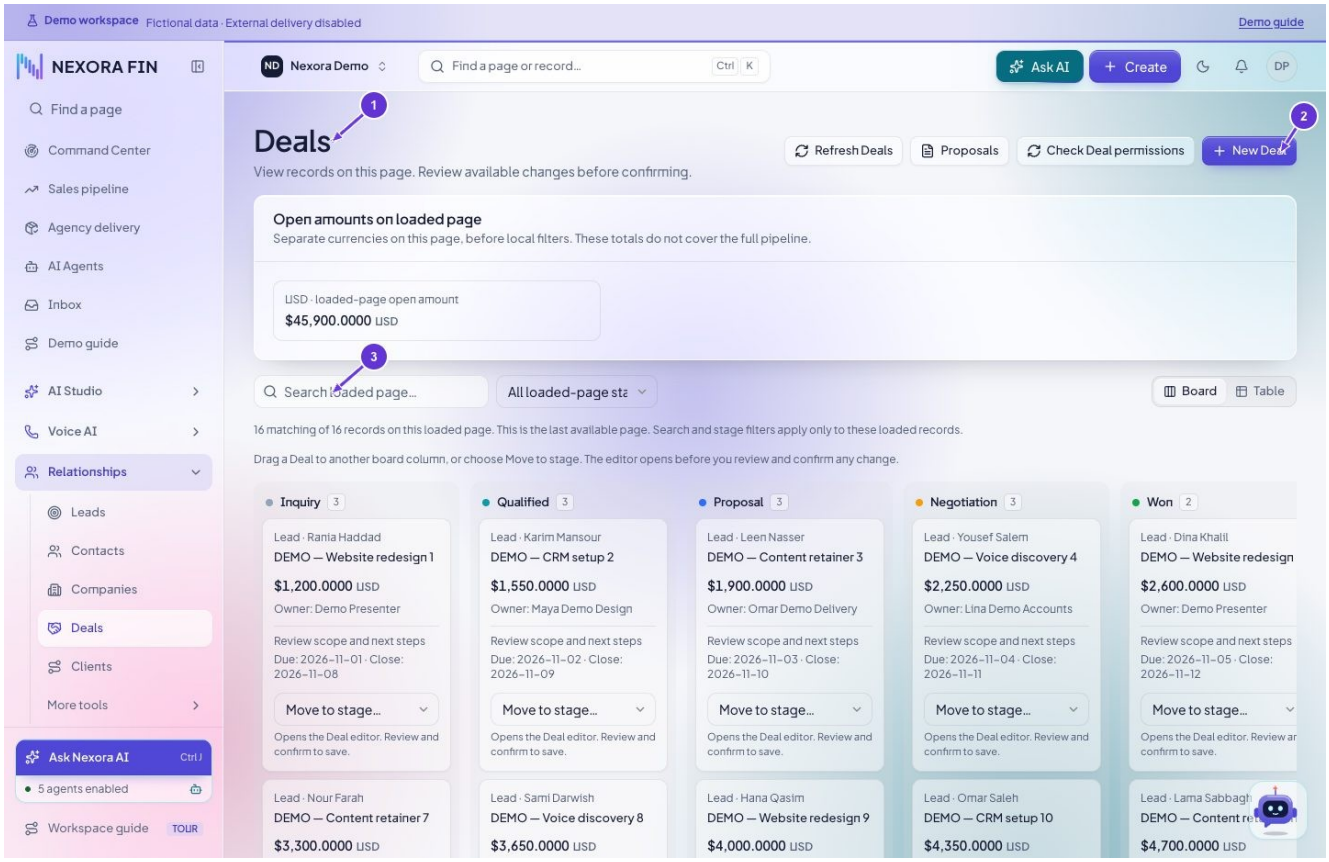


Figure 11 1 Deals · 2 New Deal · 3 Search loaded Deal page

Open in Nexora CRM

Companies

Open Relationships → Companies and select the organization. Review its linked contacts, customers and activity before editing the record.

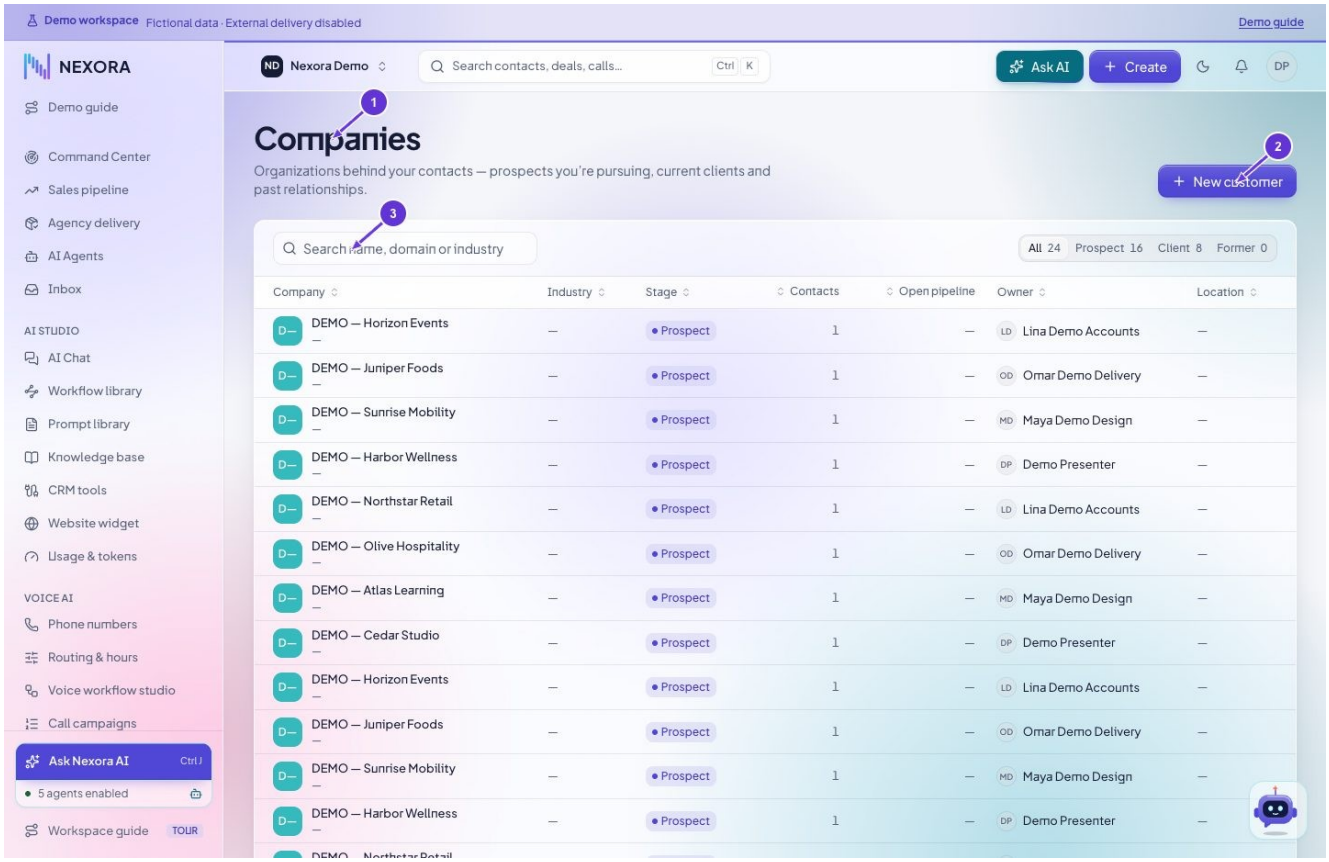


Figure 12 1 Companies · 2 New customer · 3 Search companies

Open in Nexora CRM

Advanced lead tools

Open Relationships → Advanced lead tools. Filter by status or source, select the exact rows, and review the selected set before exporting or performing a bulk action. Use Leads to verify the updated records.

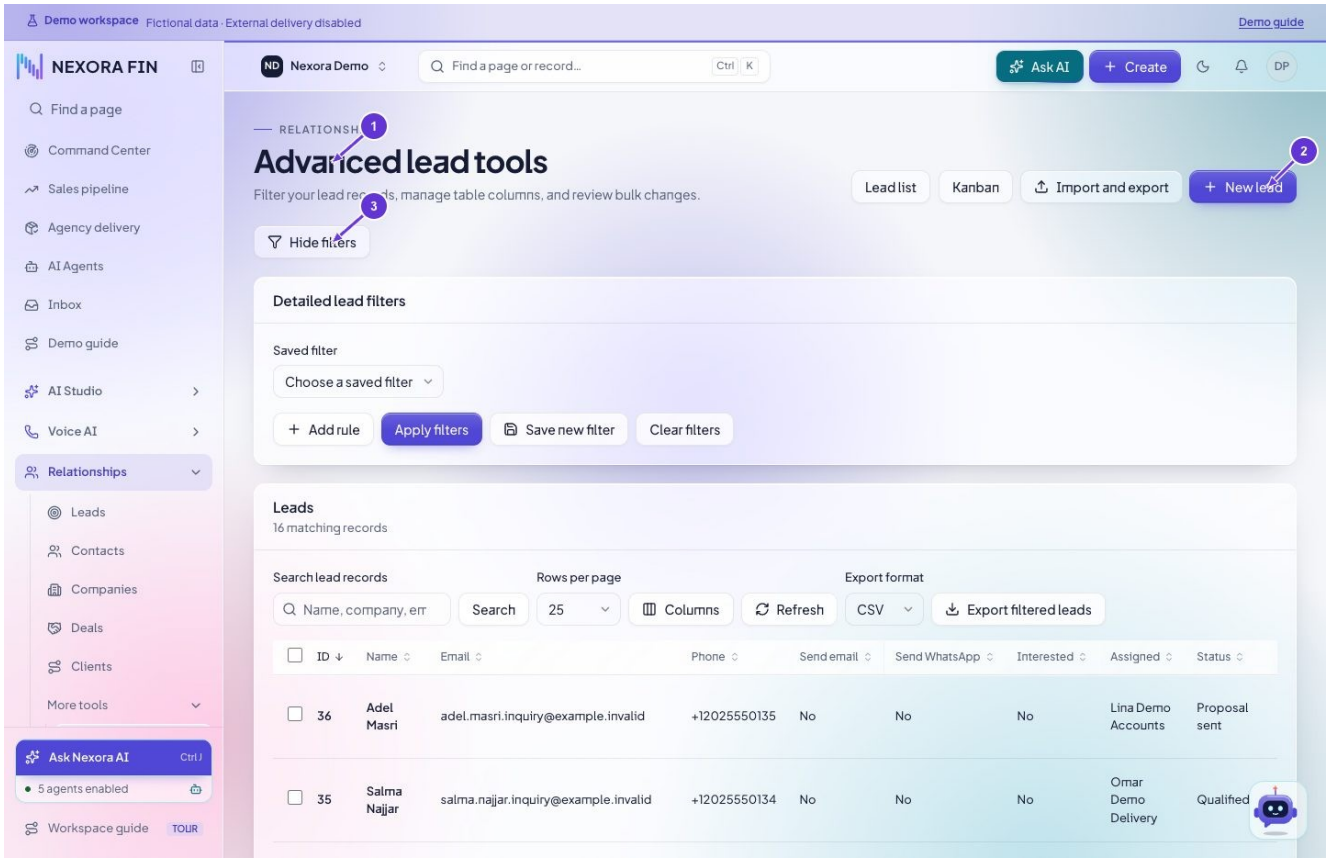


Figure 13 1 Advanced lead tools · 2 New lead · 3 Hide filters

Open in Nexora CRM

Surveys

Open a survey and review its questions, audience and recorded responses. Preview before publishing or sending.

Open in Nexora CRM

Customer groups

Create or edit the grouping label, save it, then check it appears when editing a customer. Review current assignments before deleting a group.

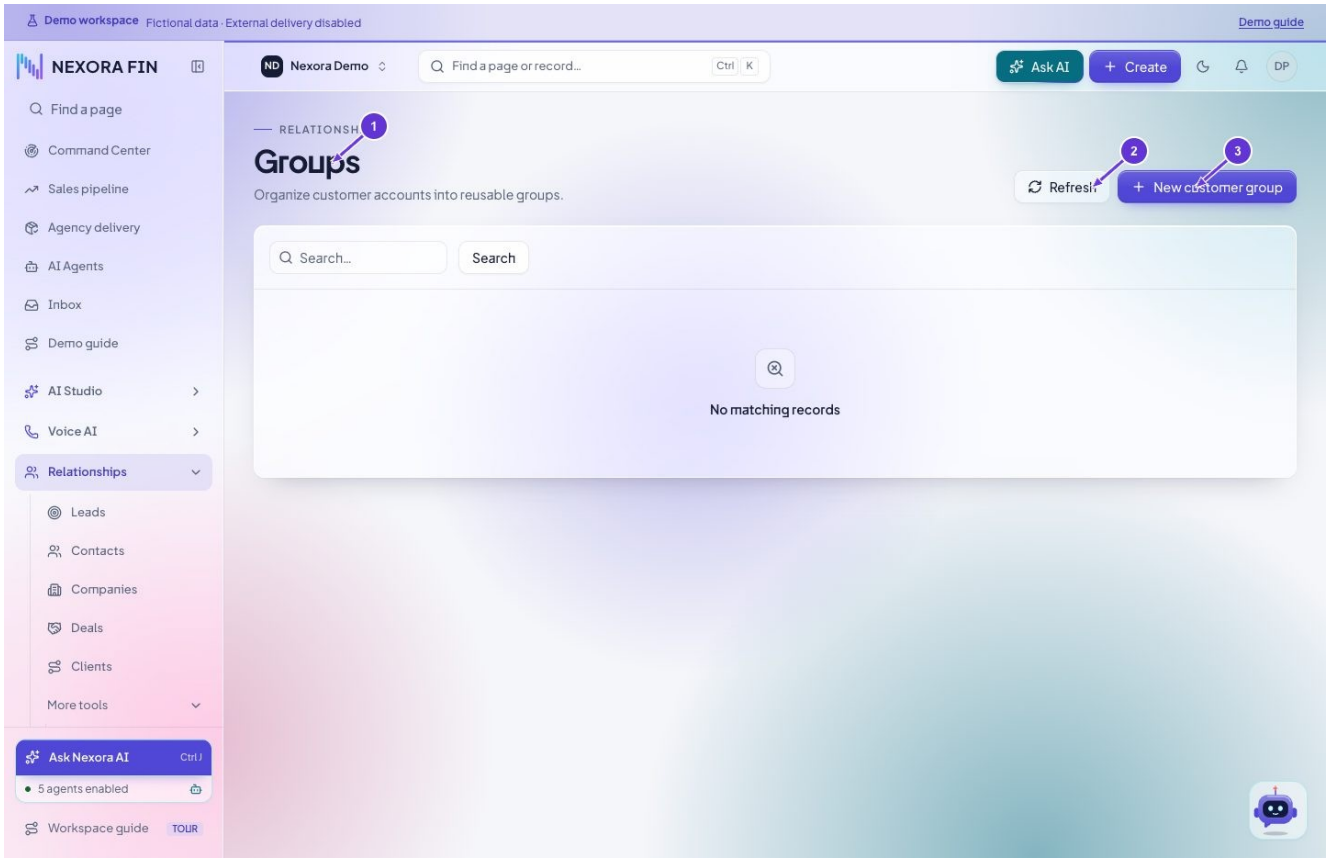


Figure 14 1 Groups · 2 Refresh · 3 New customer group

Open in Nexora CRM

Import leads from email

Review the incoming mailbox and mapping settings. Save the configuration and send a controlled test to the configured mailbox to verify lead creation.

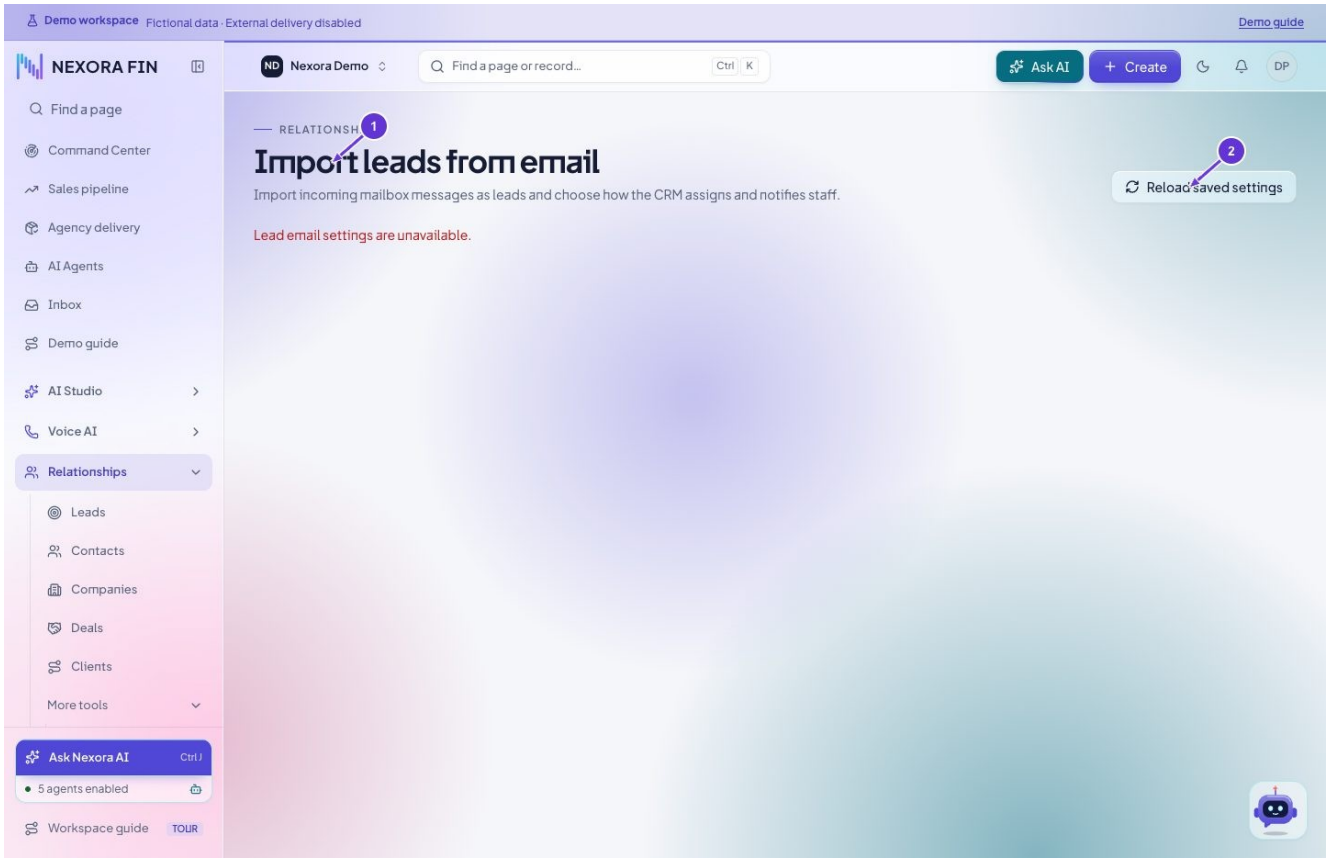


Figure 15 1 Import leads from email · 2 Reload saved settings

Open in Nexora CRM

Website lead forms

Create or edit the form and required fields, review assignment and submission behavior, and use the generated embed code. Test one submission and find the resulting lead.

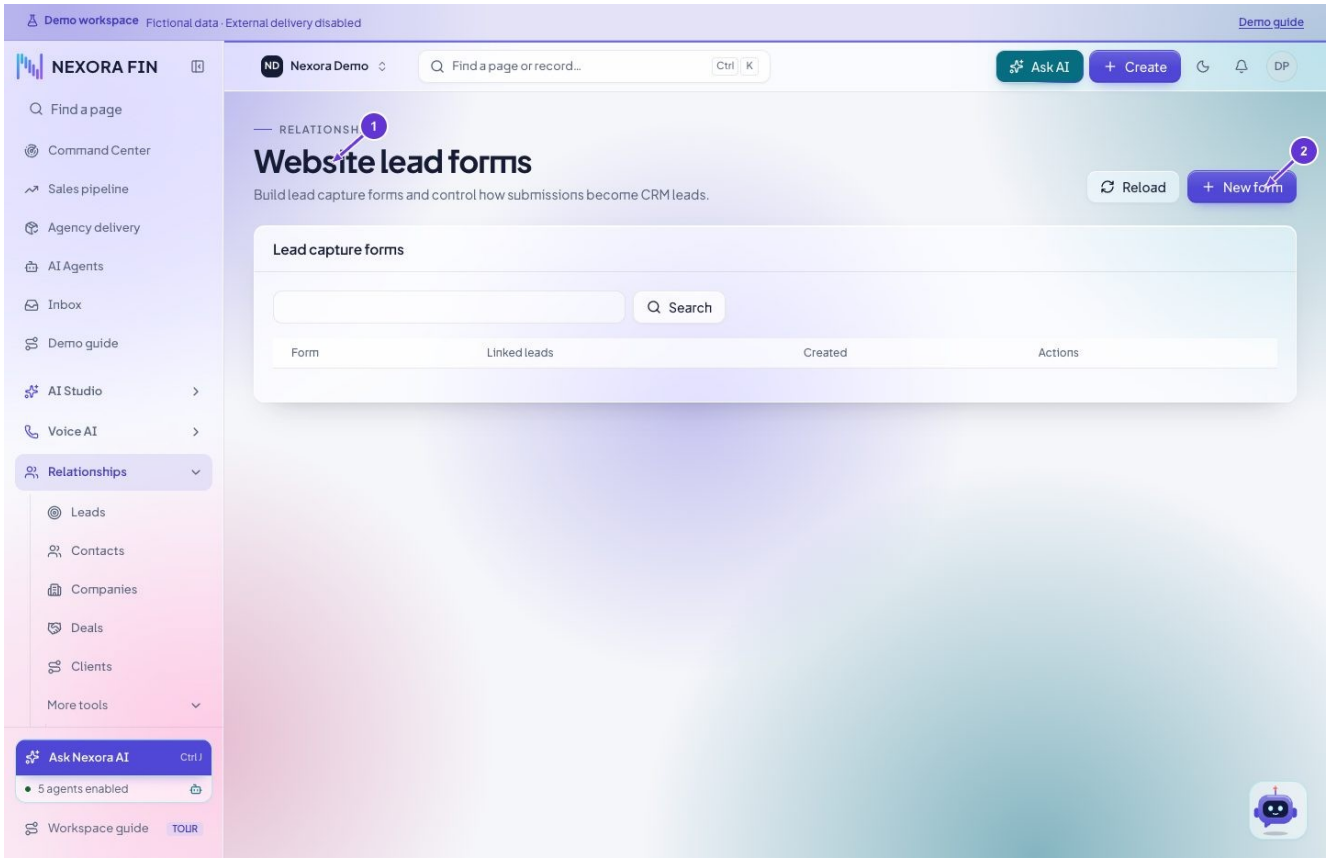


Figure 16 1 Website lead forms · 2 New form

Open in Nexora CRM

Customer privacy

Find the exact customer or privacy request. Review the data scope and available actions before export, deletion or consent changes.

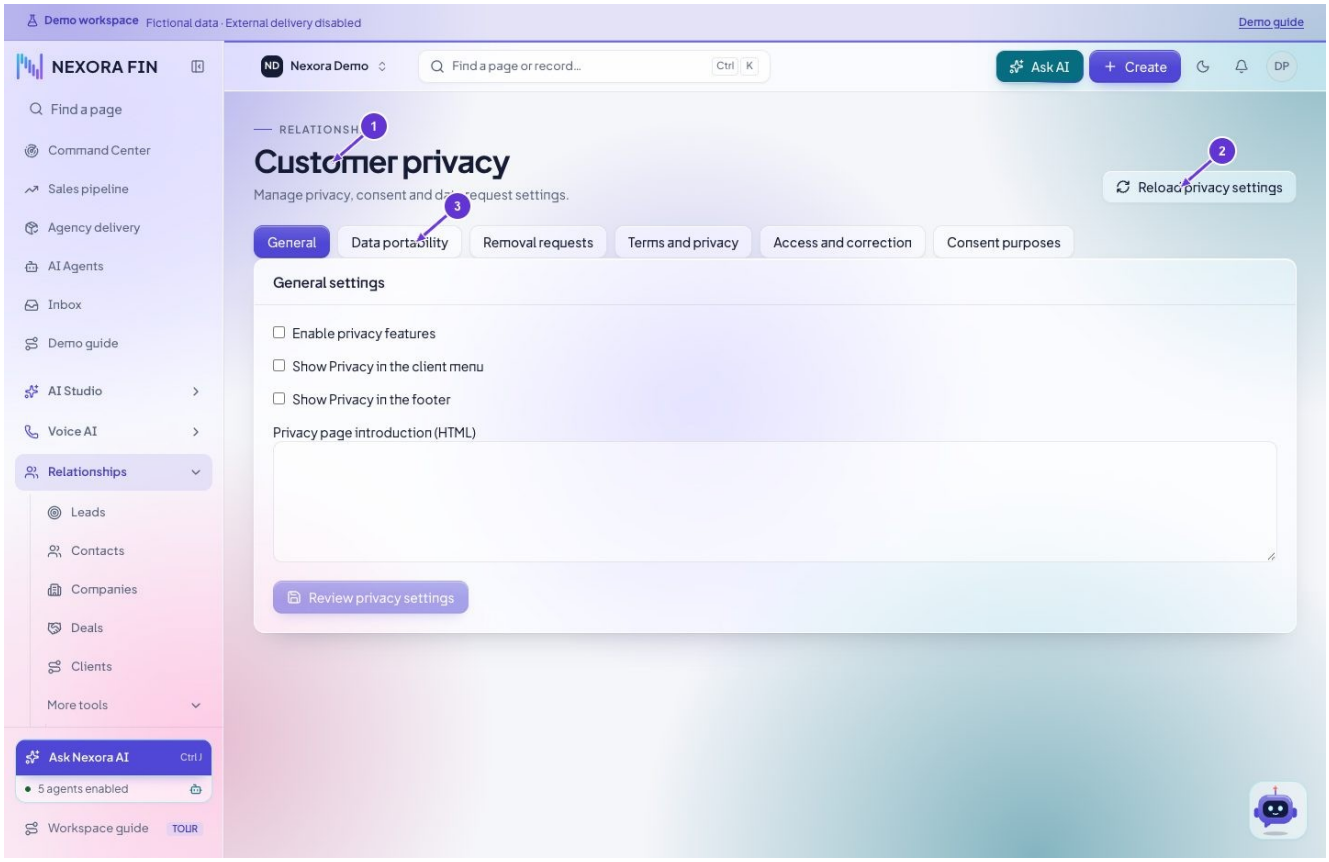


Figure 17 1 Customer privacy · 2 Reload privacy settings · 3 Data portability

Open in Nexora CRM

03 Work and planning

Agency delivery

Review the delivery view by client and project. Open the underlying project or task to inspect dates, ownership and current progress.

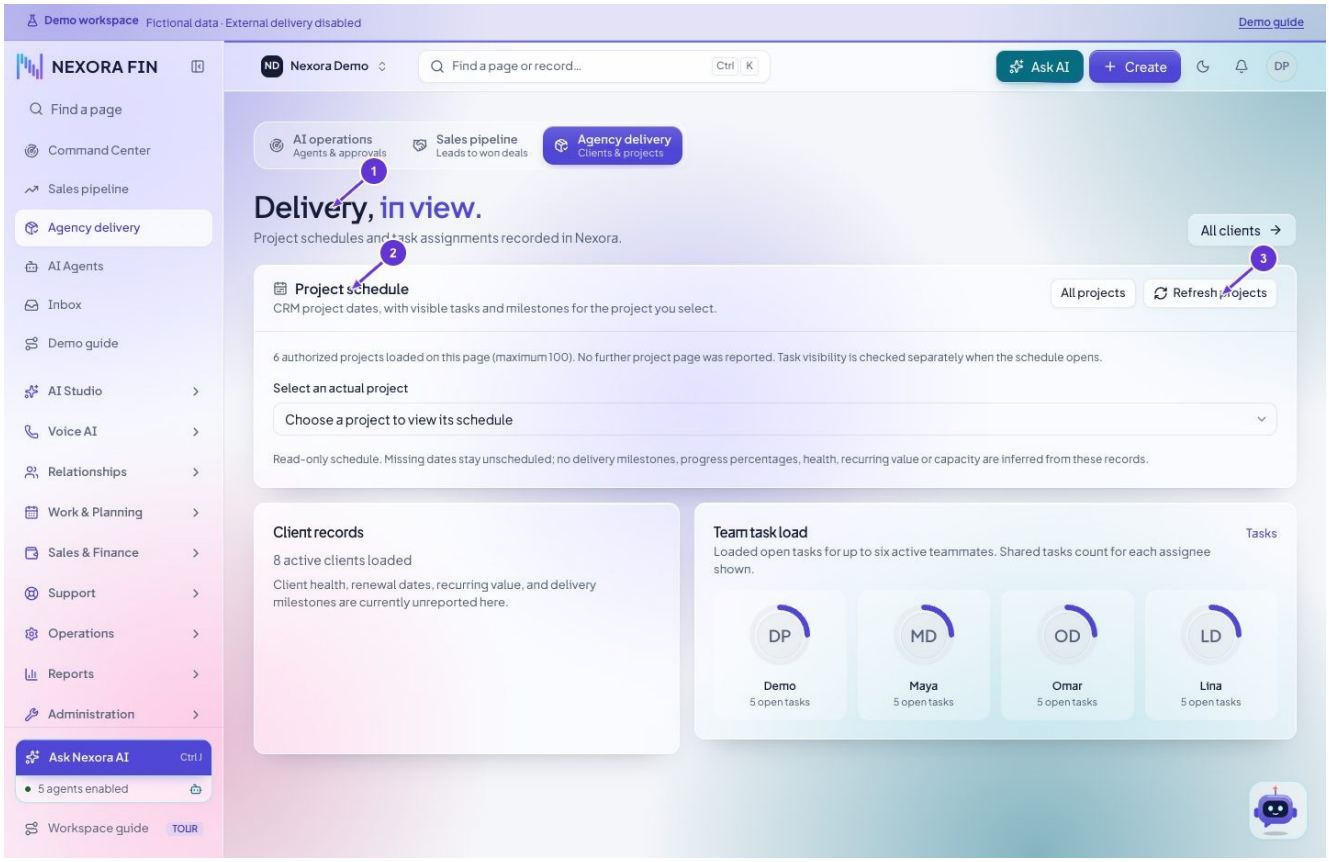


Figure 18 1 Delivery, in view. · 2 Project schedule · 3 Refresh projects

Open in Nexora CRM

Calendar

Open Work & Planning → Calendar. Change the date range or switch between Day, Week, and Agenda to find an event. Open it to confirm the time. If New event is available, use it to choose the date and time in the workspace time zone and save.

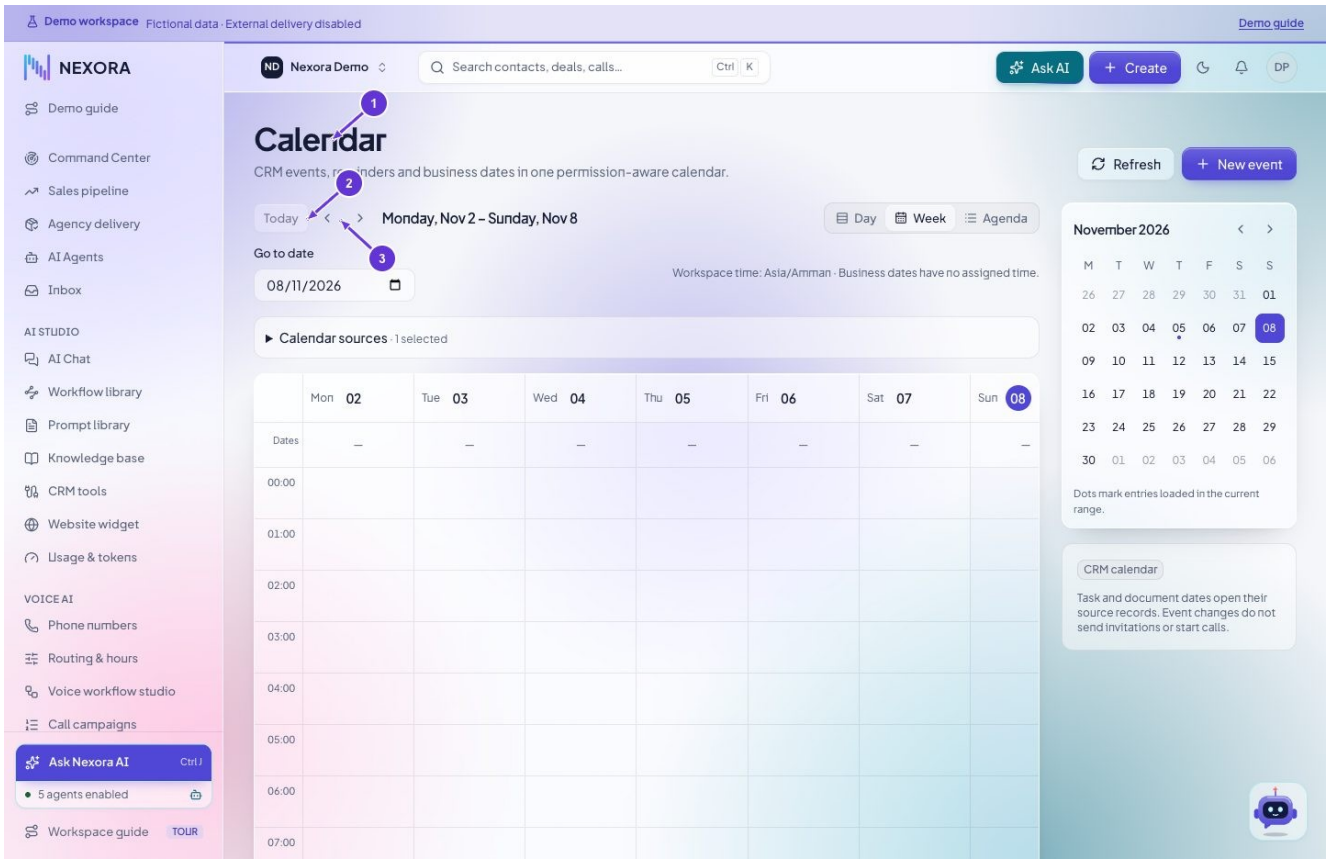


Figure 19 1 Calendar · 2 Today · 3 Previous week

Open in Nexora CRM

Book an appointment from the calendar

Open Appointments and choose the staff calendar and date. Select a lead and an available time, enter the title and save. Reopen the saved appointment to verify the lead, time zone and start time. To move or cancel it, use the appointment action so availability is updated with the record.

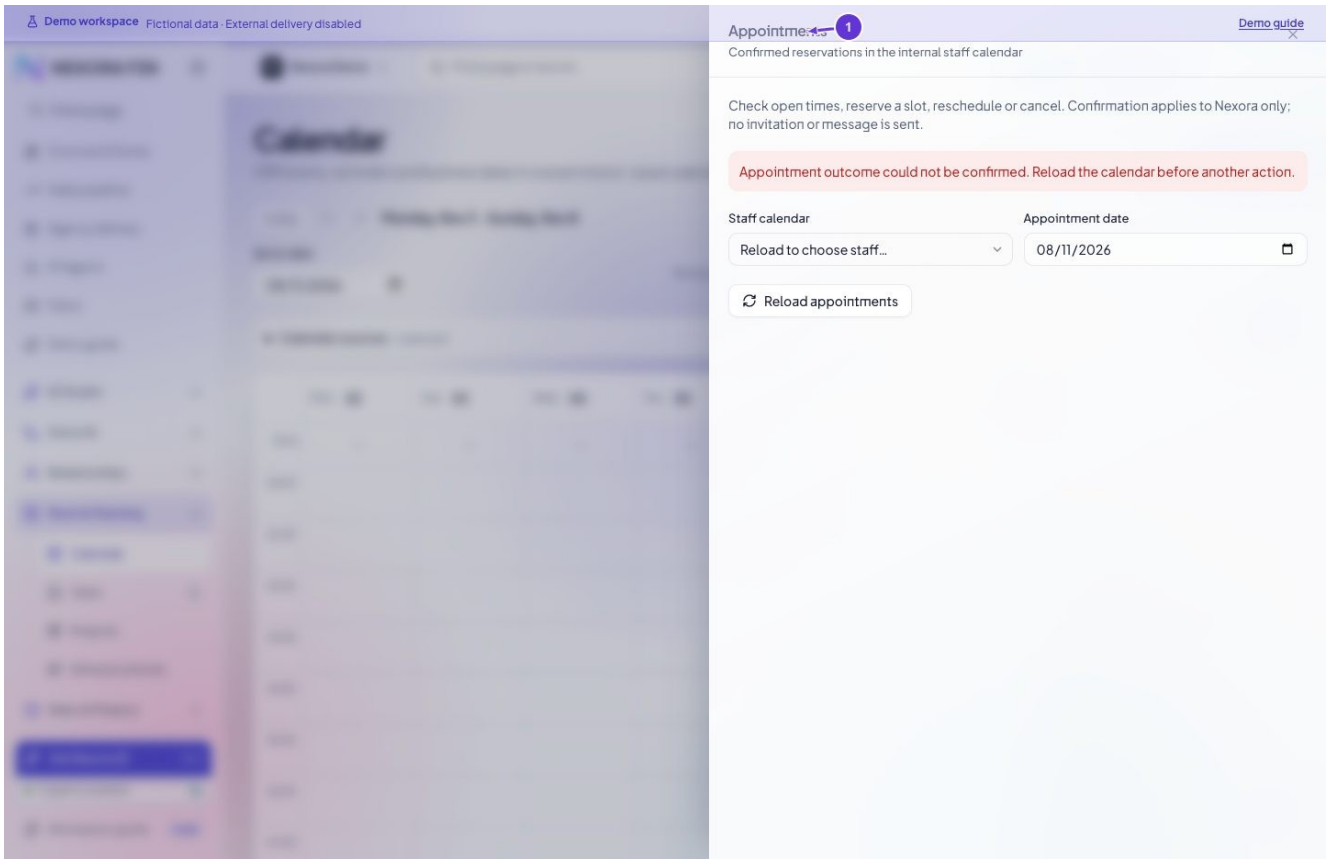


Figure 20 1 Appointments

Open in Nexora CRM

Tasks

Open Work & Planning → Tasks. Choose New task, enter a title and set the due date, priority, assignee and related record as needed. Save, reopen the task and check that the owner and due date persisted.

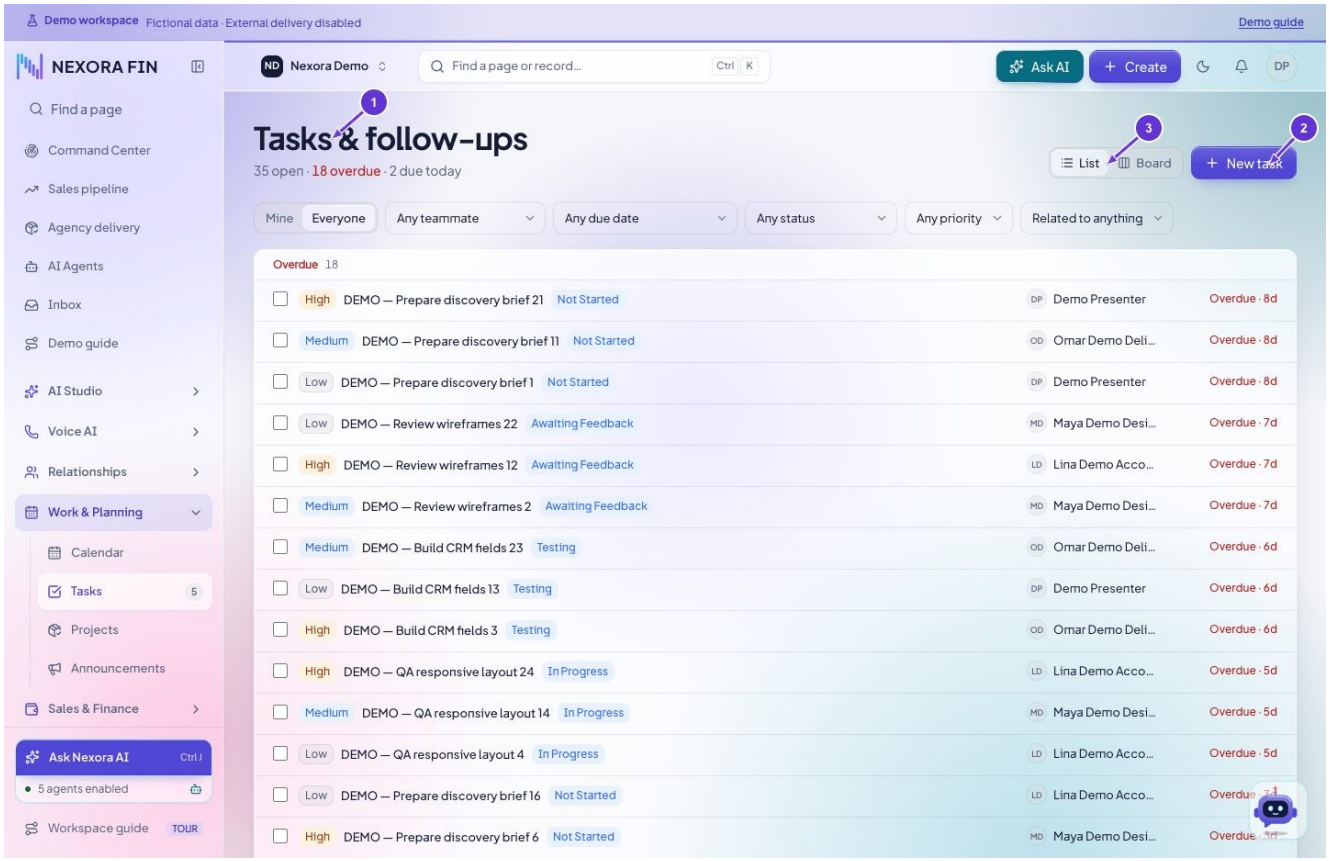


Figure 21 1 Tasks & follow-ups · 2 New task · 3 List

Open in Nexora CRM

Projects

Open Work & Planning → Projects. Open the project to review its status, milestones and related tasks. Use the permitted Create or Edit action and reopen the saved record to confirm the changes.

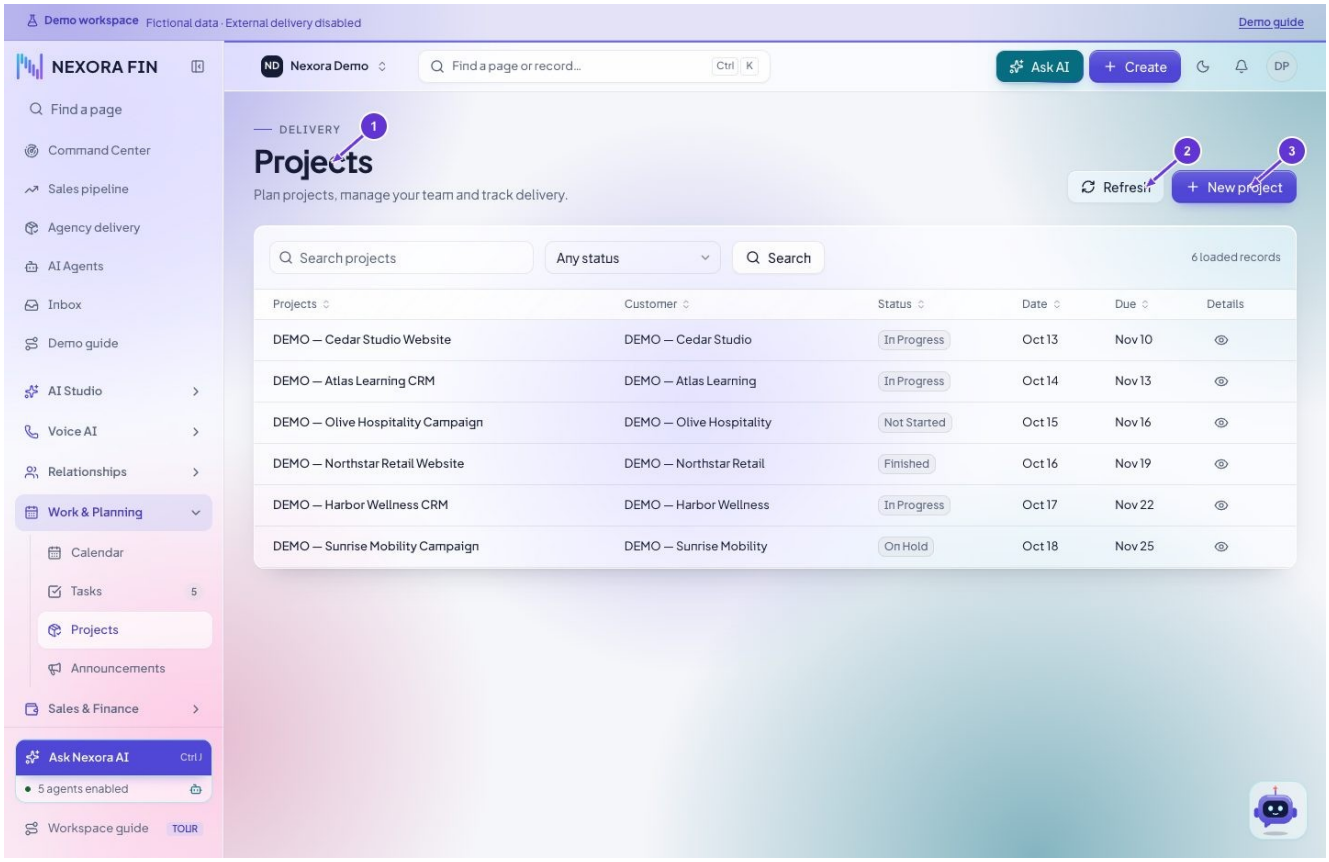


Figure 22 1 Projects · 2 Refresh · 3 New project

Open in Nexora CRM

Project workspace tabs

Open the project and use the sections available to your role. Review Overview for status, Tasks and Milestones for delivery, and Discussions, Files and Timesheets for collaboration and tracking. Check the project identity before adding or editing an item.

Open in Nexora CRM

Announcements

Open Work & Planning → Announcements. Prepare the title and message, then check staff and customer visibility before saving. Reopen the announcement and verify its audience and display.

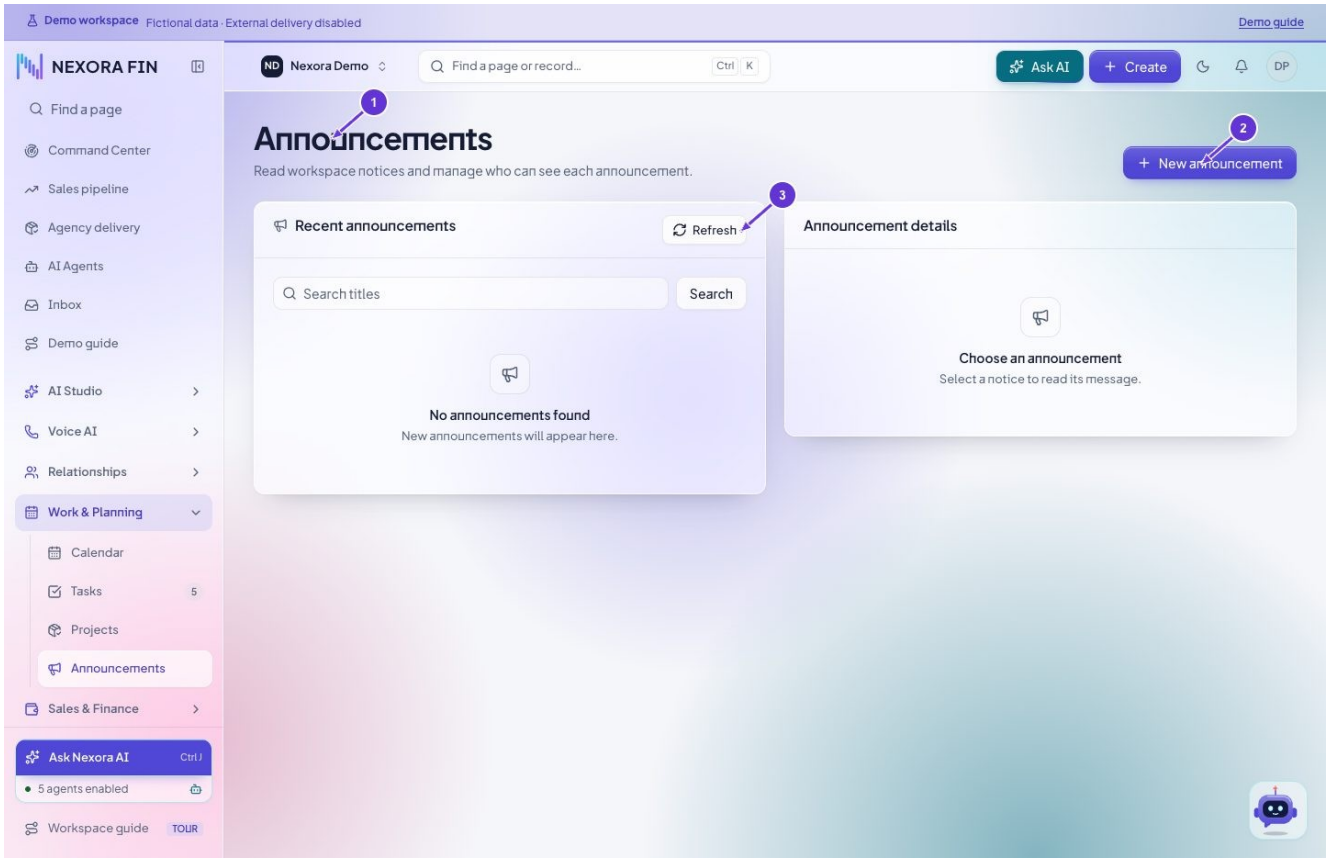


Figure 23 1 Announcements · 2 New announcement · 3 Refresh

Open in Nexora CRM

Goals tracking

Open the goal and review its period, metric and progress. Check the underlying record before modifying the goal.

Open in Nexora CRM

04 AI studio and agents

AI Agents

Open AI Agents and select the agent, then Configure. Use the settings sections to change the desired values, review the change and save. Reopen the agent and verify the provider response. Phone assignments and local CRM eligibility are separate controls.

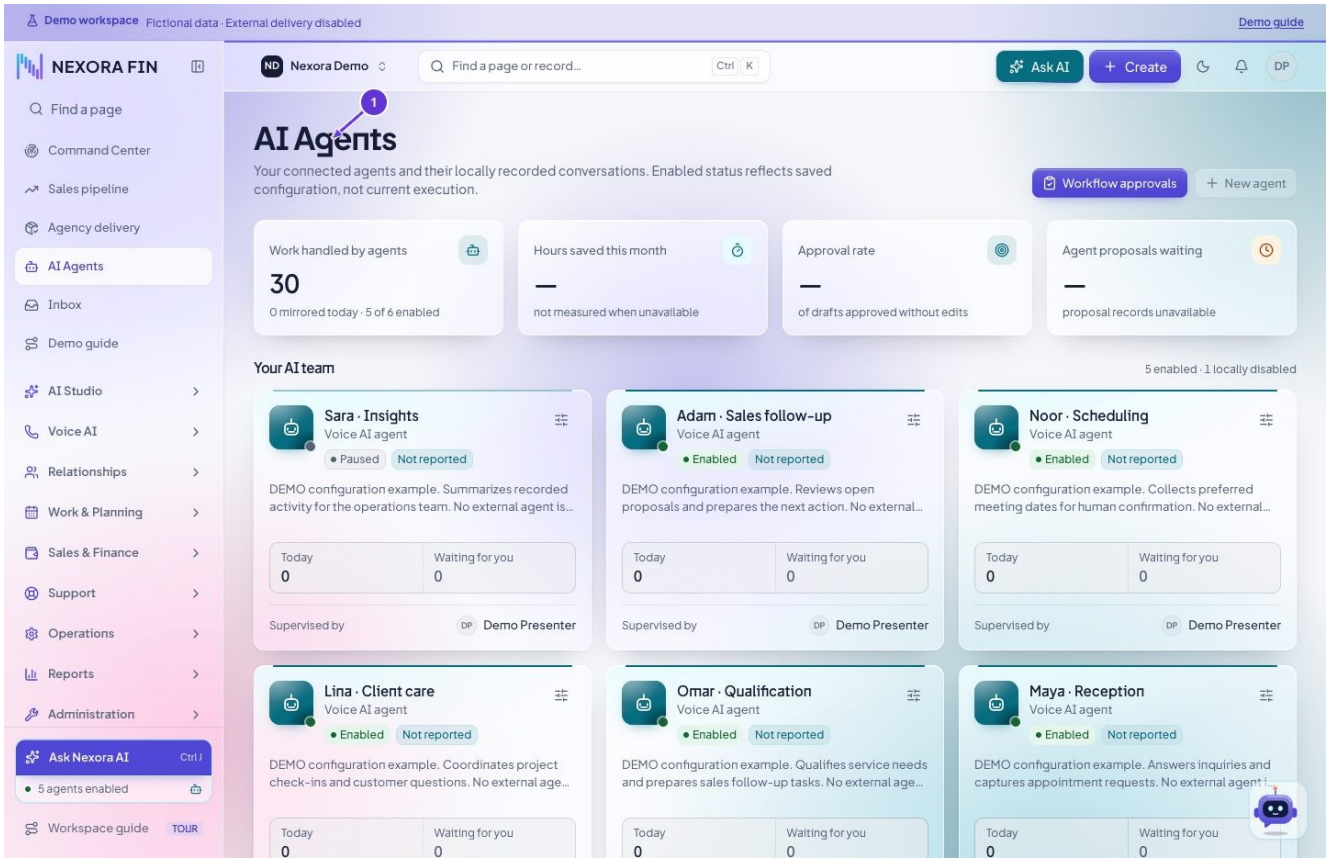


Figure 24 1 AI Agents

Open in Nexora CRM

Agent Overview tab

Open AI Agents and select the agent. Open Overview to review its provider, settings summary and available connections.

Open in Nexora CRM

Agent Activity tab

Open AI Agents and select the agent. Open Activity to review recorded conversations and recent events, then select a call for details.

Open in Nexora CRM

Agent Configure tab

Open AI Agents and select the agent. In Configure, change the specific supported setting, review the proposal and verify the saved provider values.

Open in Nexora CRM

Agent Test tab

Open AI Agents, select the agent, and open Test. Check the testing availability notice. When the page reports that the provider sandbox is not connected, the composer and Send are disabled and no test is run here. Verify the provider connection before choosing an authorized testing method.

Open in Nexora CRM

AI Chat

Open AI Studio → AI Chat. Use Product help for step-by-step instructions, or select CRM records and attach a supported record for a scoped answer about its contents. A follow-up in Product help can use earlier support turns in the same chat. Keep passwords and keys out of chat.

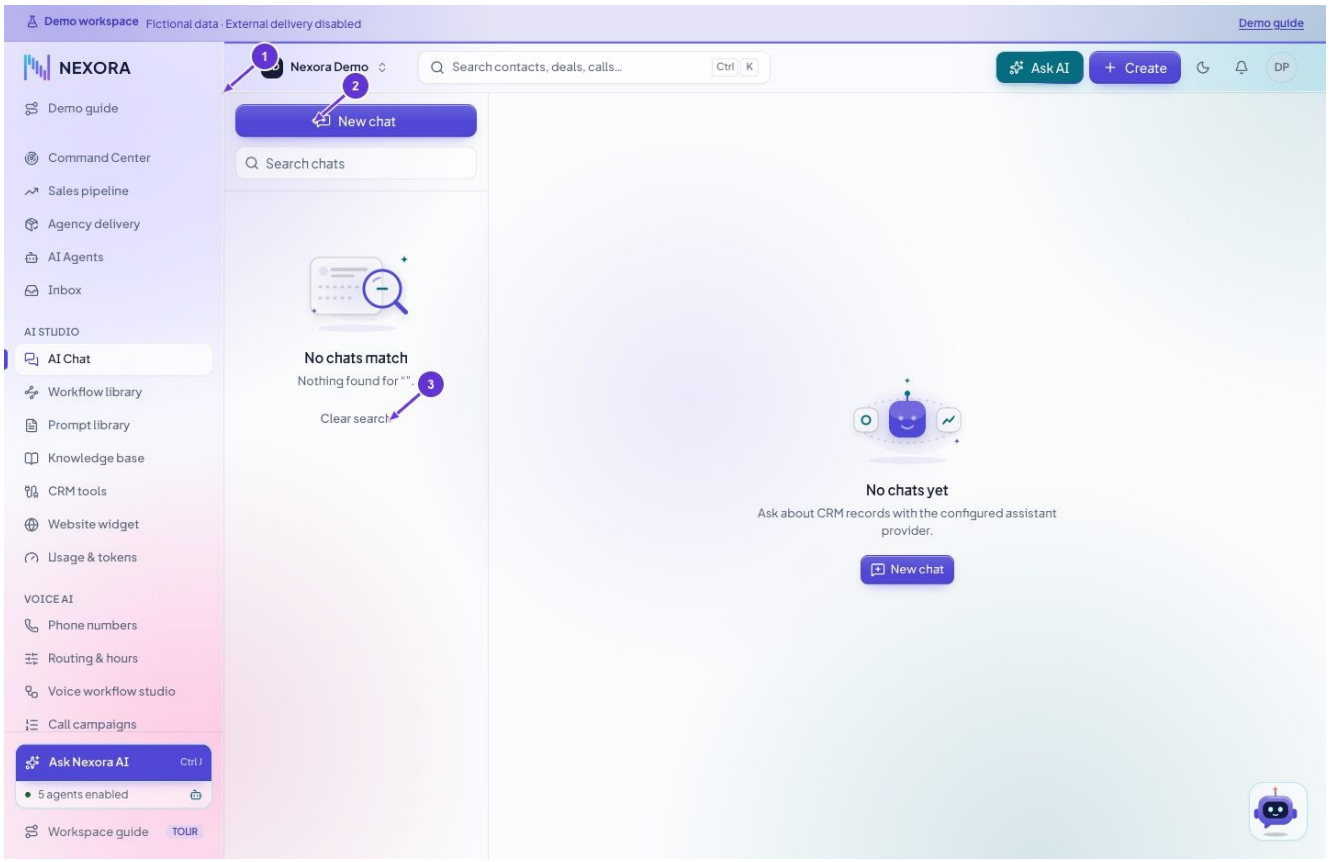


Figure 25 1 AI Chat · 2 New chat · 3 Clear search

Open in Nexora CRM

Prompt library

Open AI Studio → Prompt library, choose the prompt or create a draft, edit and save it, and reopen to check the version. Verify the specific agent or workflow configuration that consumes it before expecting a live behavior change.

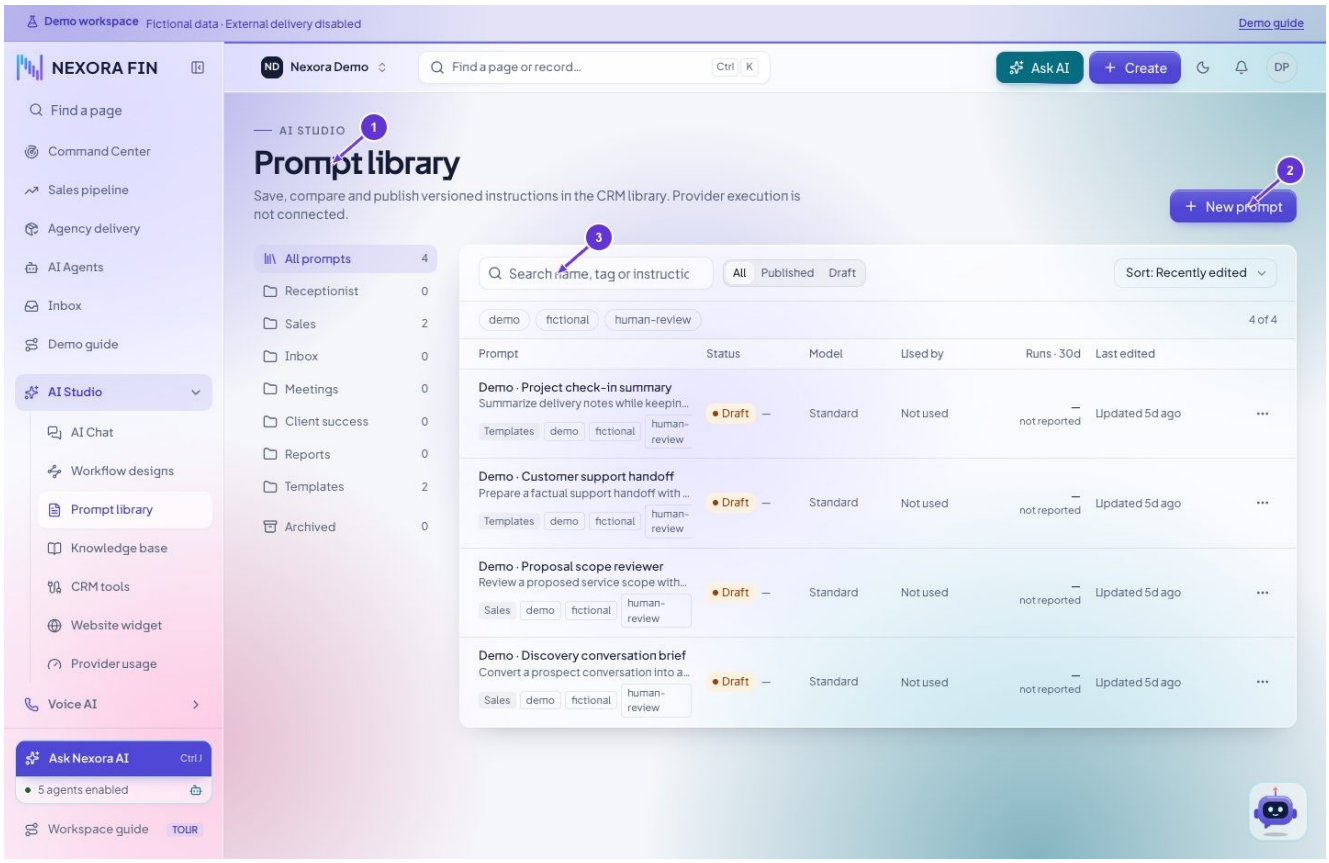


Figure 26 1 Prompt library · 2 New prompt · 3 Search prompts

Open in Nexora CRM

Knowledge base

Open AI Studio → Knowledge base. Add the approved document or supported text/URL, check its indexing state, then verify the intended agent has the document attached. Ask a known question in the agent's test interface and compare its answer with the source.

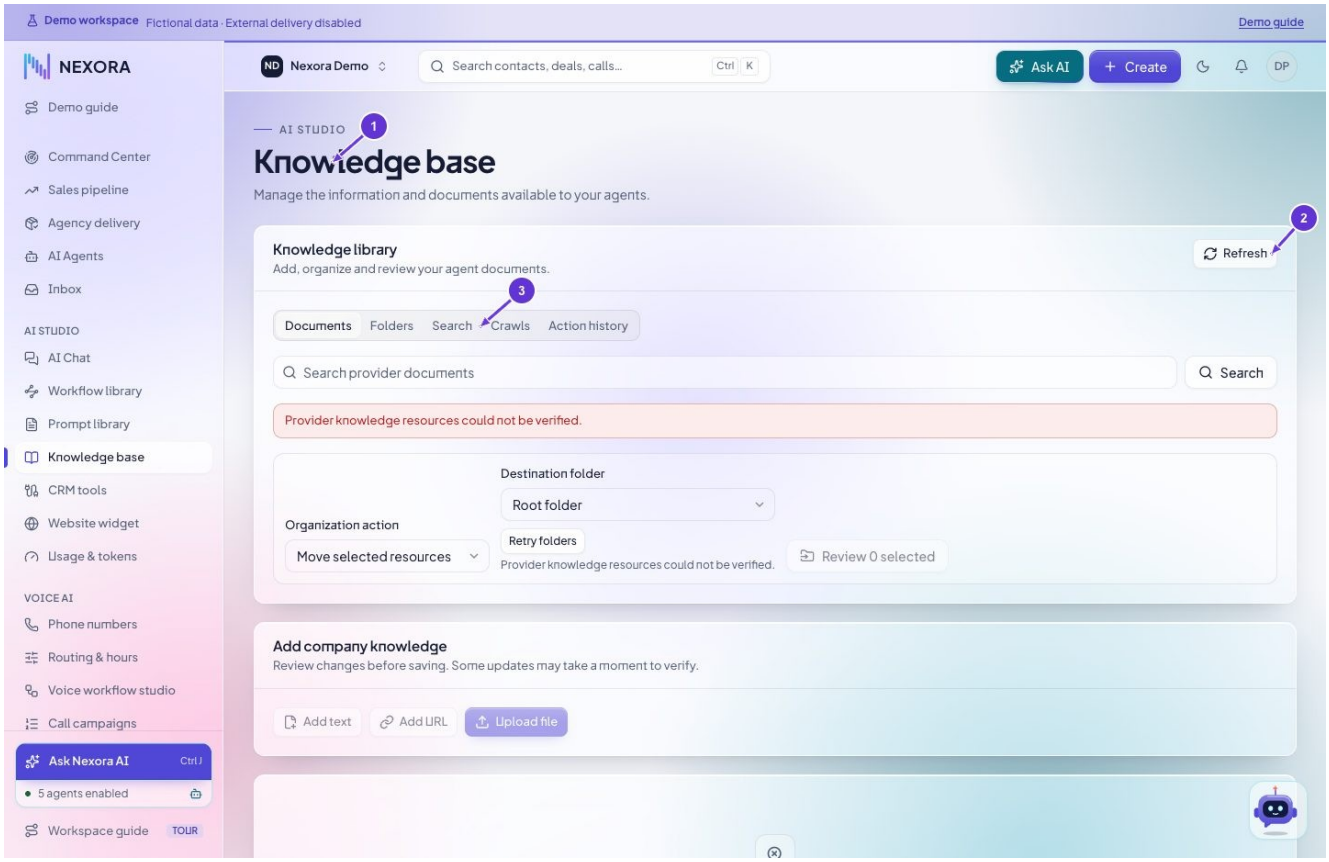


Figure 27 1 Knowledge base · 2 Refresh · 3 Search

Open in Nexora CRM

CRM tools

Open AI Studio → CRM tools. Select the permitted operation and inspect its required fields. Review the grant for the specific agent before saving. Test the exact allowed action with an authorized record and confirm its receipt.

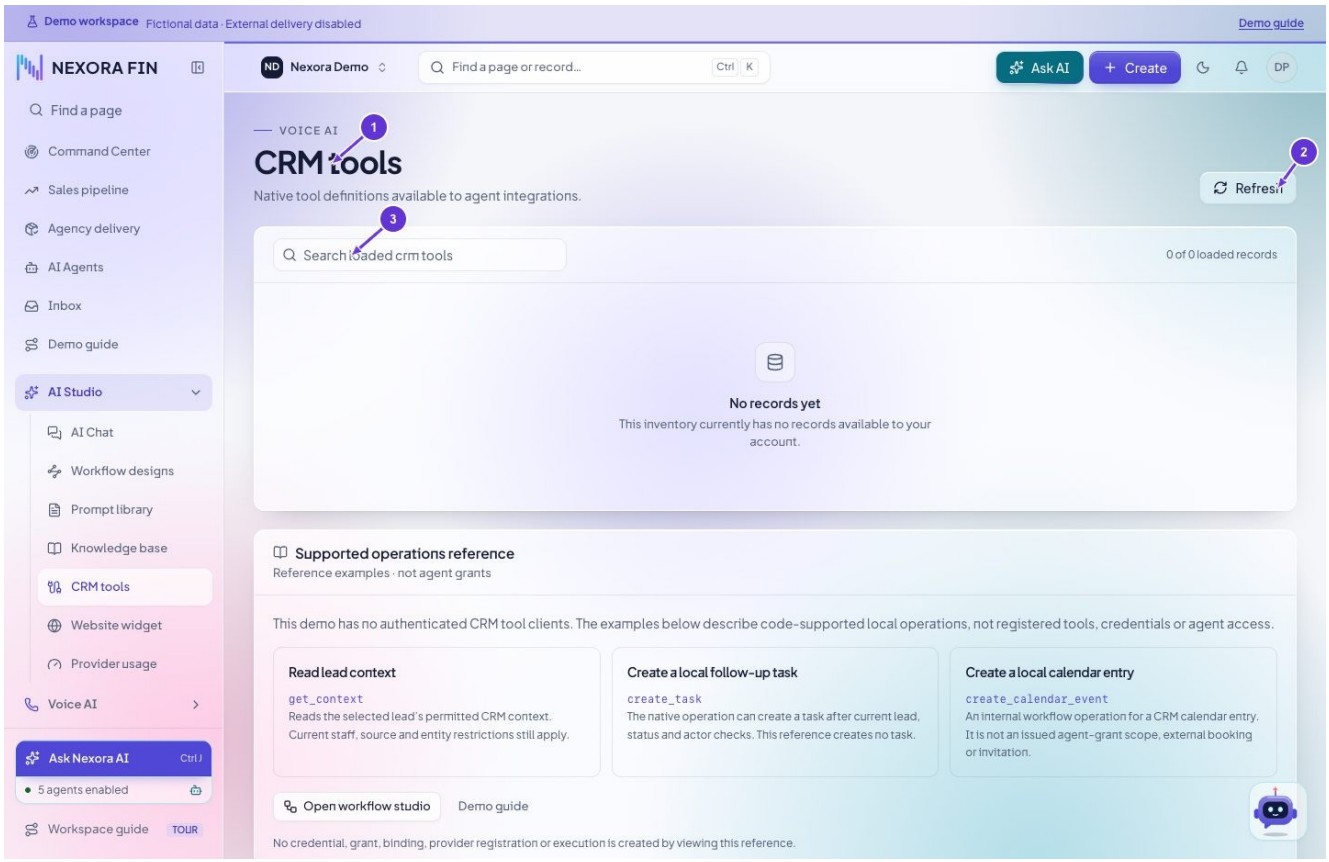


Figure 28 1 CRM tools · 2 Refresh · 3 Search CRM tools

Open in Nexora CRM

Website widget

Open AI Studio → Website widget. Select the intended agent, review allowed domains and widget settings, and save. Preview from the intended domain and check that the interaction reaches the CRM. Microphone access and provider callback delivery must work separately.

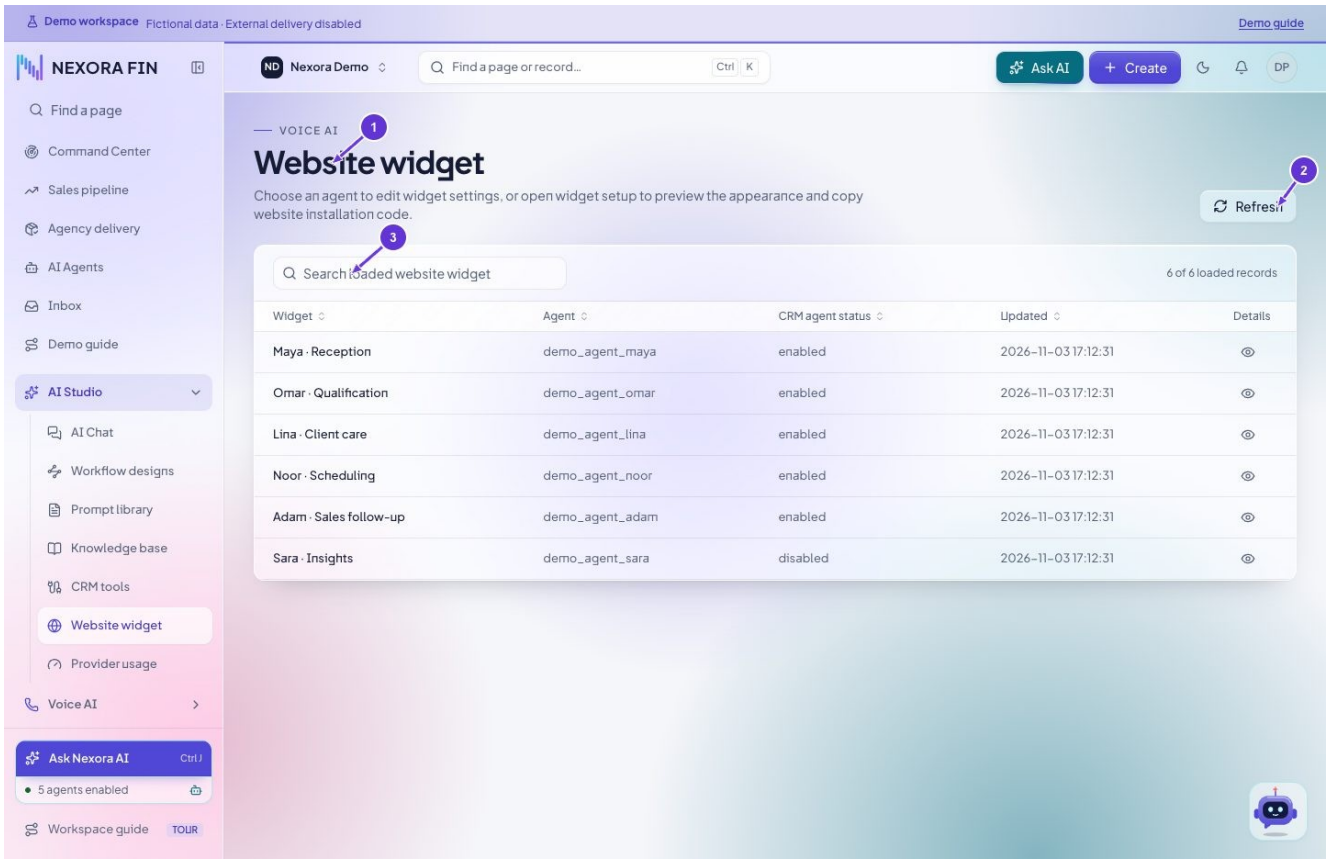


Figure 29 1 Website widget · 2 Refresh · 3 Search Website widget

Open in Nexora CRM

Workflow designs

Open AI Studio → Workflow designs to inspect the available designs. Use Voice workflows for the active voice trigger and its published definition. Check the bound version and run history before concluding that a design is active.

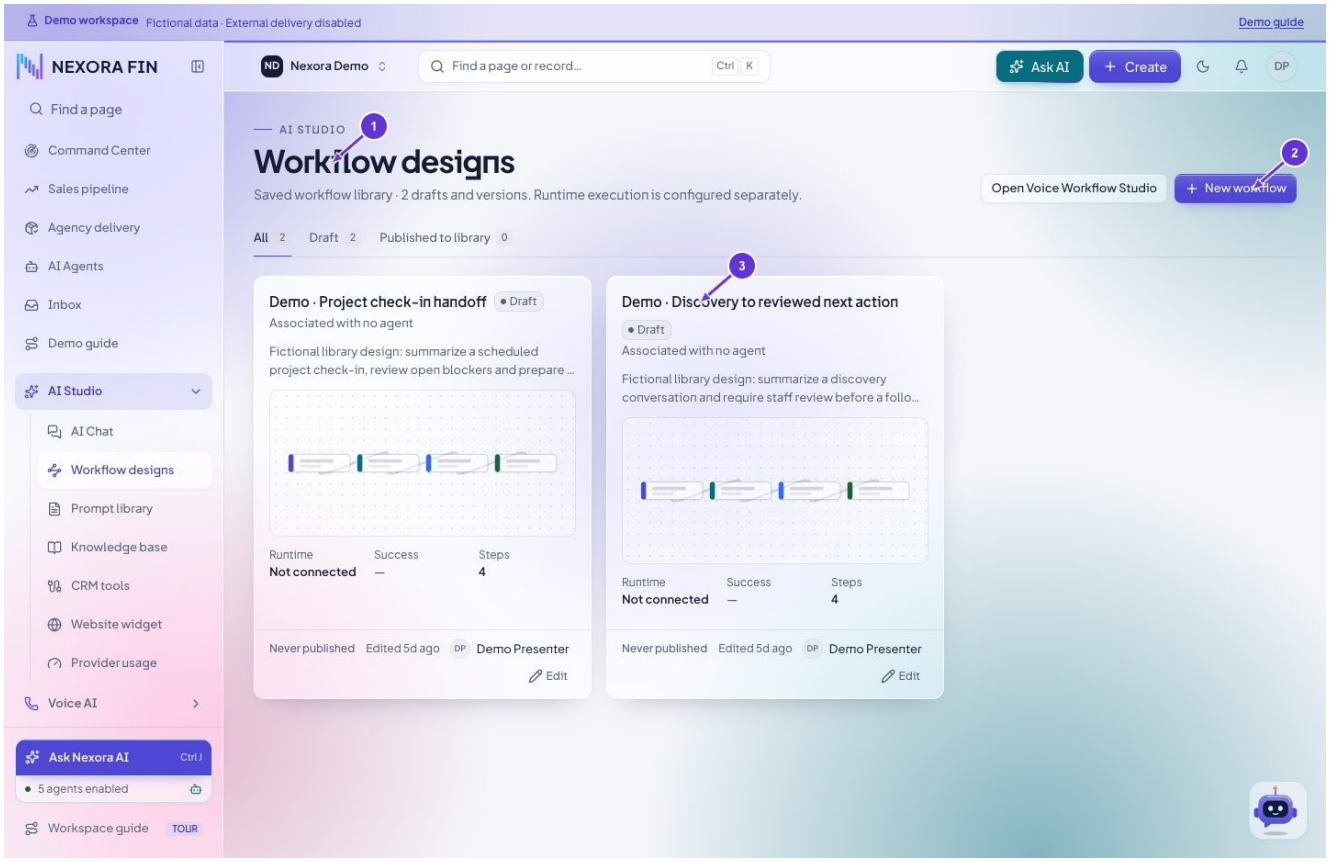


Figure 30 1 Workflow designs · 2 New workflow · 3 Demo · Discovery to reviewed next action

Open in Nexora CRM

AI configuration

Open Settings → AI configuration to review AI behavior options. Provider connection settings are under Integrations. Save the intended option and verify the configured provider before checking an actual response in AI Chat.

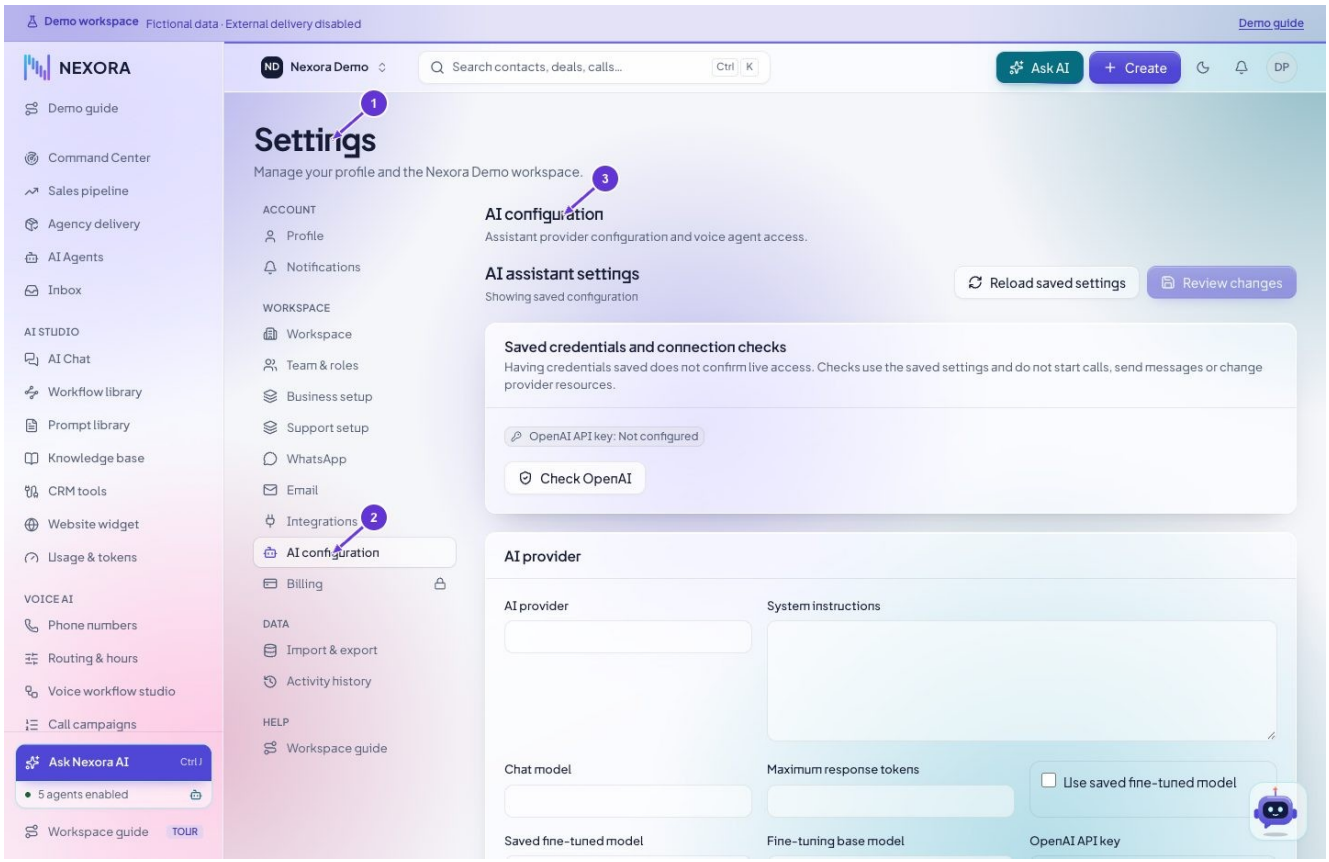


Figure 31 1 Settings · 2 AI configuration · 3 AI configuration

Open in Nexora CRM

Workflow approvals

Open Workflow approvals and select the waiting workflow. Inspect the exact run and step before approving or rejecting it. verify the subsequent run status.

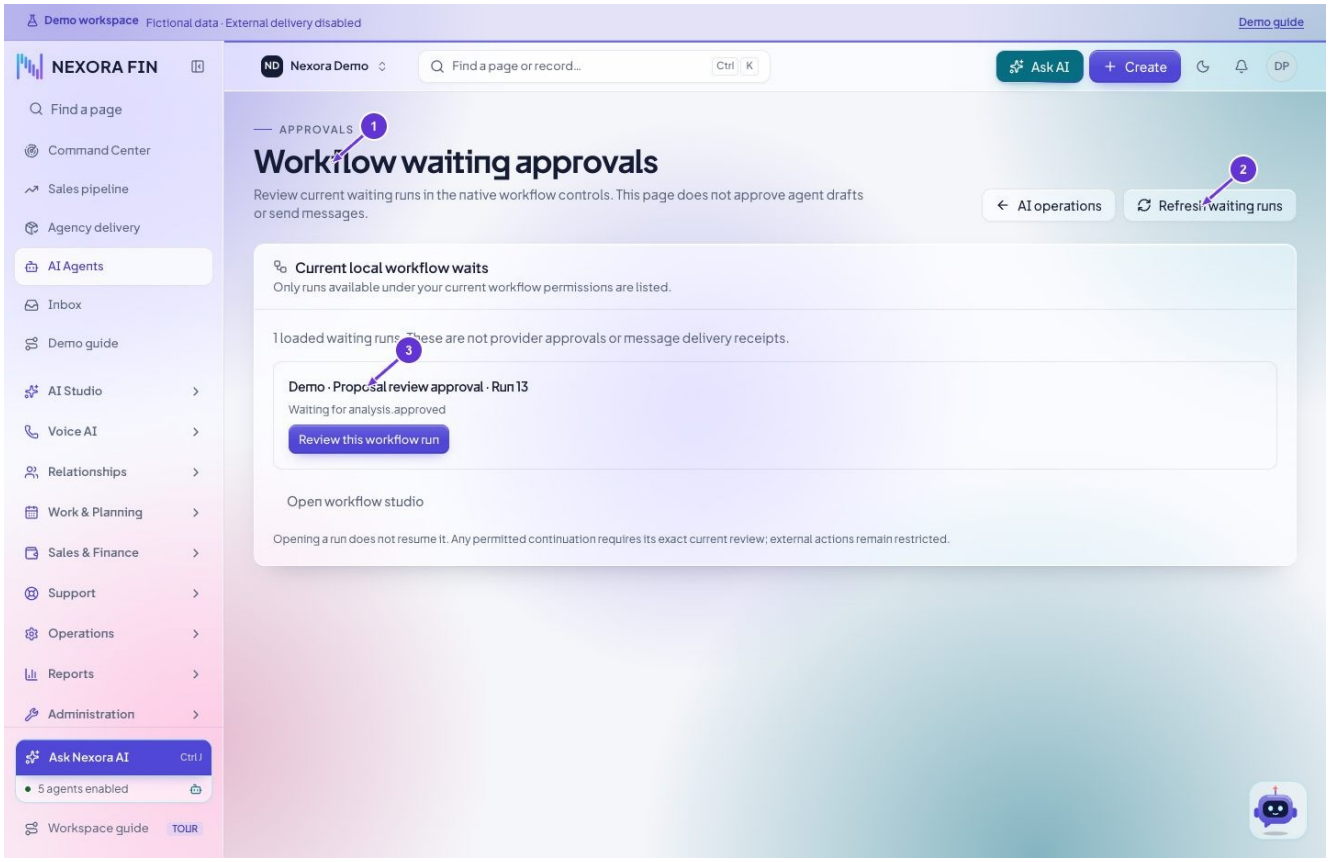


Figure 32 1 Workflow waiting approvals · 2 Refresh waiting runs · 3 Demo · Proposal review approval · Run 13

Open in Nexora CRM

Workflow review mode

Open Review mode to list workflows waiting for action. Open the exact run and inspect its current step and status before any permitted approval. Reload the run afterward to confirm its outcome.

Open in Nexora CRM

Agent call flows

Select the agent and the available graph or version. Inspect nodes and connections, then open AI Agents → Configure to review settings that affect live behavior.

Open in Nexora CRM

Voice workspace resources

Review provider variables, secrets and workspace resources for the selected connection. Open the exact resource to check its scope. keep secret values in their designated fields.

Open in Nexora CRM

ElevenLabs workspace

Open the provider workspace and review the configured connection, workspace settings and agent access. Use the available verify controls before relying on the connection.

Open in Nexora CRM

Widget setup

Select the intended agent, preview the widget, and copy the installation code after verifying allowed domains. Confirm the published site can load and use the widget.

Open in Nexora CRM

Connect external tools

Open the MCP tools page, review the connector and its authorized operations, then test one permitted operation and check the resulting receipt.

Open in Nexora CRM

Test AI models

Open Test AI models, select the model or evaluation, and review inputs and evaluation results. Compare models on the same test cases.

Open in Nexora CRM

ElevenLabs overview

Review the linked workspace, agents and recent activity. Use AI Agents or Calls to inspect the corresponding CRM record.

Open in Nexora CRM

OpenAI settings

Open OpenAI settings, review the selected model and masked configuration, save the intended change, then verify a response in AI Chat.

Open in Nexora CRM

05 Voice AI and communications

Calls

Open Voice AI → Calls. Use direction, status or search filters and open the call. Review direction, duration, outcome, transcript, recording and workflow activity where each is available. A pending or missing recording may need the signed provider event to arrive.

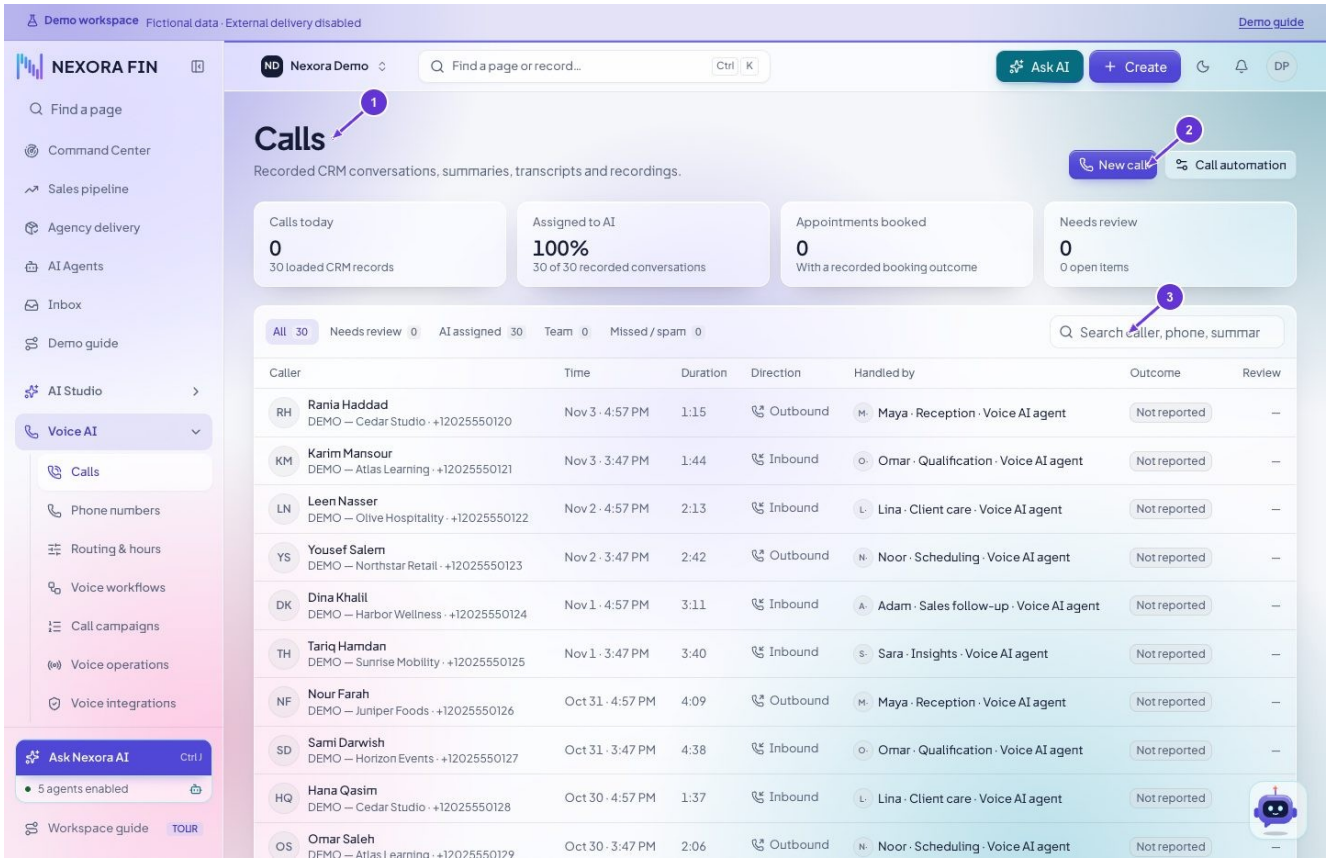


Figure 33 1 Calls · 2 New call · 3 Search calls

Open in Nexora CRM

Call details and recording

Open a row in Calls. Confirm direction, timestamps, duration, agent and the linked CRM record. Read the summary, review transcript turns and play the recording where available. Open workflow activity to verify any task, update or booking against its source record.

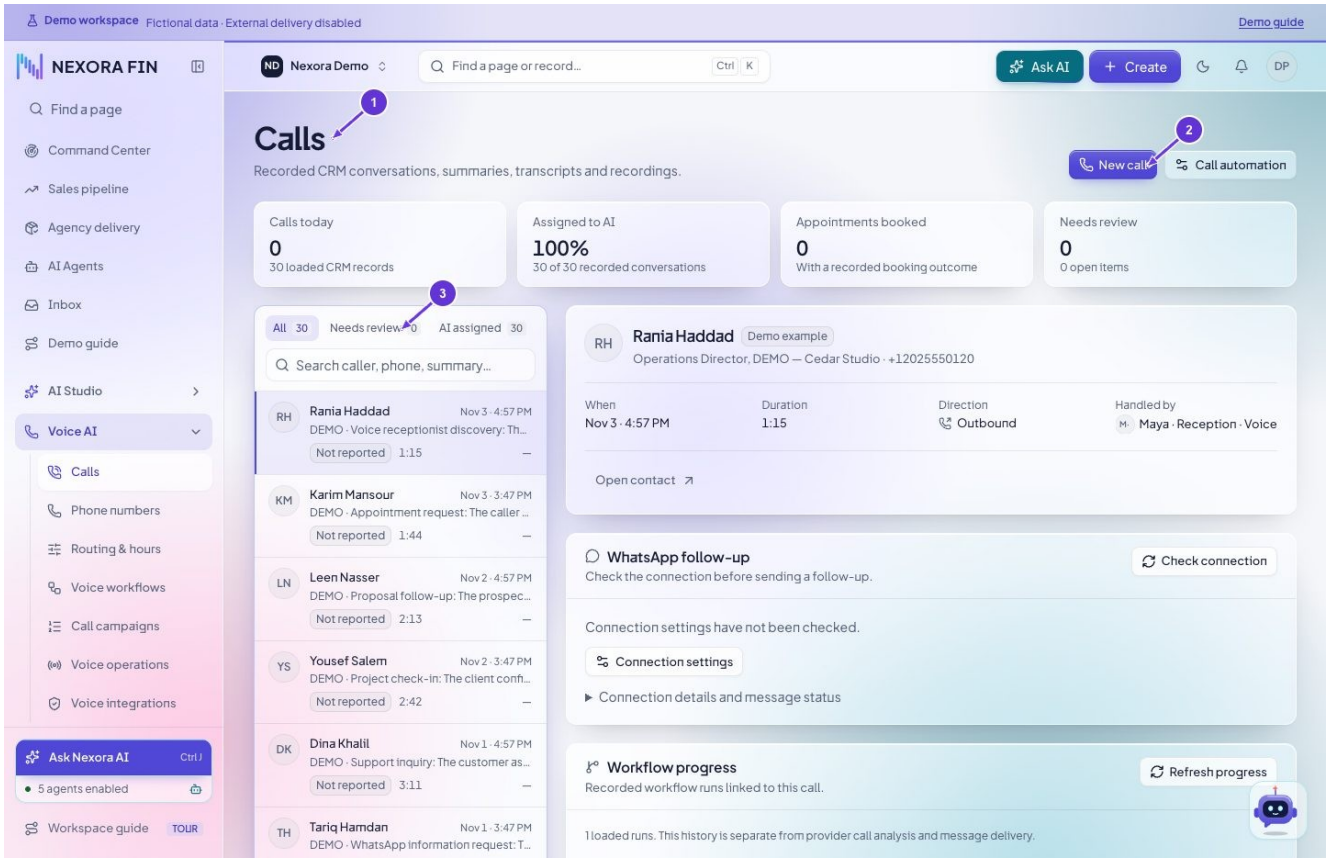


Figure 34 1 Calls · 2 New call · 3 Needs review 0

Open in Nexora CRM

Inbound call to CRM follow-up

Start with an inbound-capable number assigned to the intended agent. Verify its routing, time zone and outside-hours behavior. After an authorized test call, open Calls, find the inbound entry and check the linked lead, transcript and workflow. A captured demo request can generate a follow-up task. An appointment is confirmed when Calendar contains a saved booking.

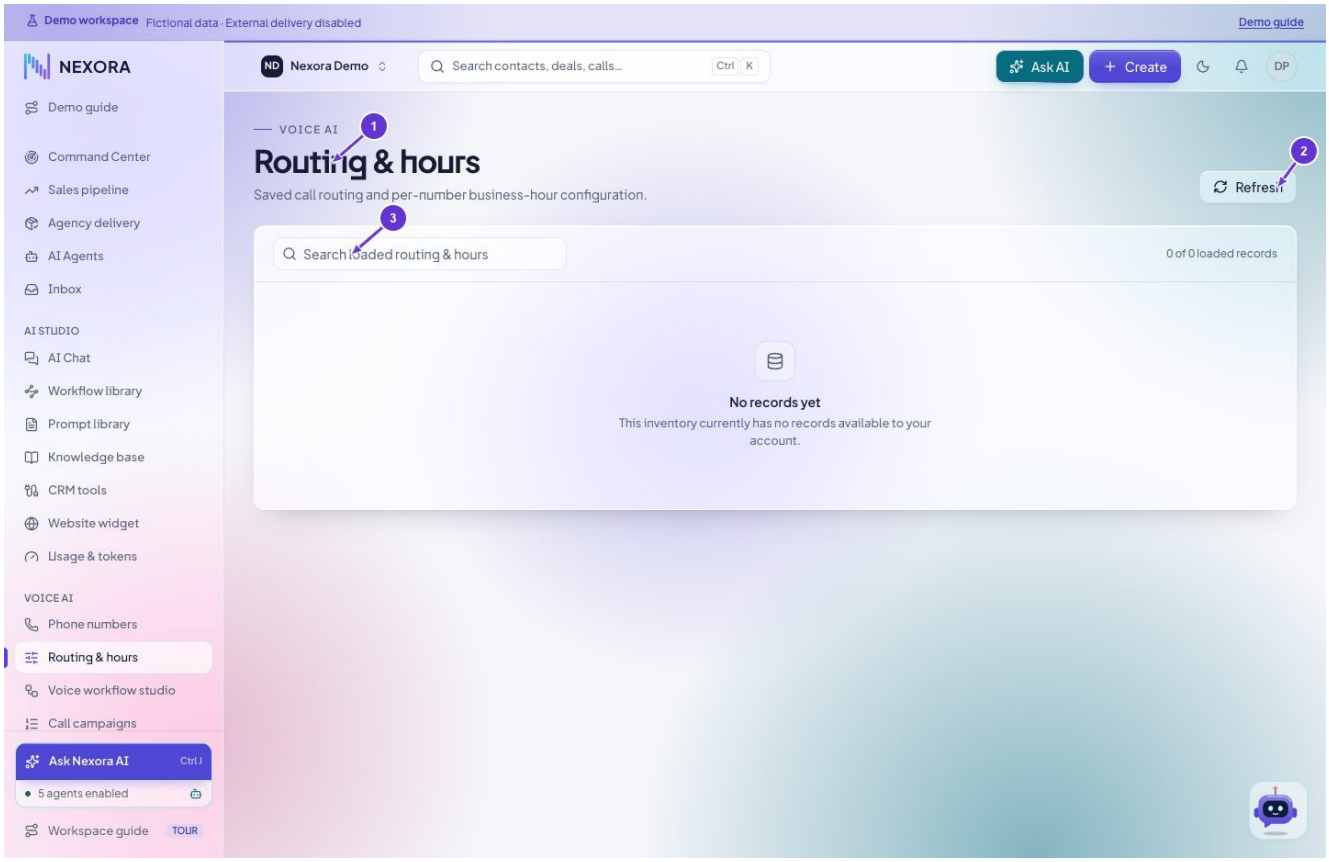


Figure 35 1 Routing & hours · 2 Refresh · 3 Search Routing & hours

Open in Nexora CRM

Outbound call from review to result

Choose a permitted lead or recipient, the eligible source number and the agent. Review Hold, consent, the selected identity and any allowed call settings. Submit the reviewed call once. Use the same attempt in Calls or Voice operations to track uncertain outcomes. Check the transcript and workflow after the provider reports completion.

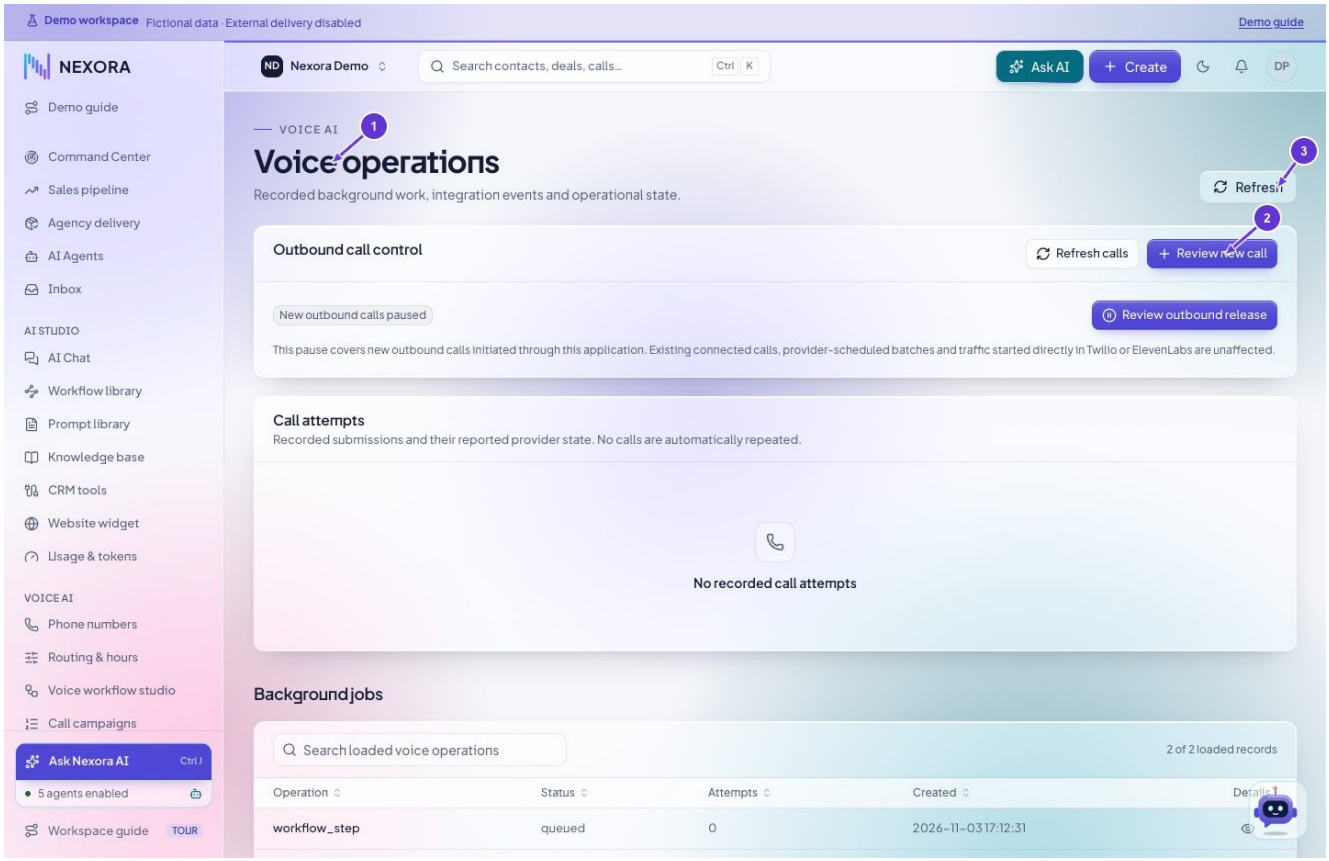


Figure 36 1 Voice operations · 2 Review new call · 3 Refresh

Open in Nexora CRM

Voice appointment booking

Verify the intended agent can check availability and confirm booking through its permitted CRM tools. Set the workflow and event binding that match the call scenario. The caller must agree to the exact available time. Verify a confirmed event in Calendar and review the run or call evidence. A requested time in a summary alone does not establish a confirmed reservation.

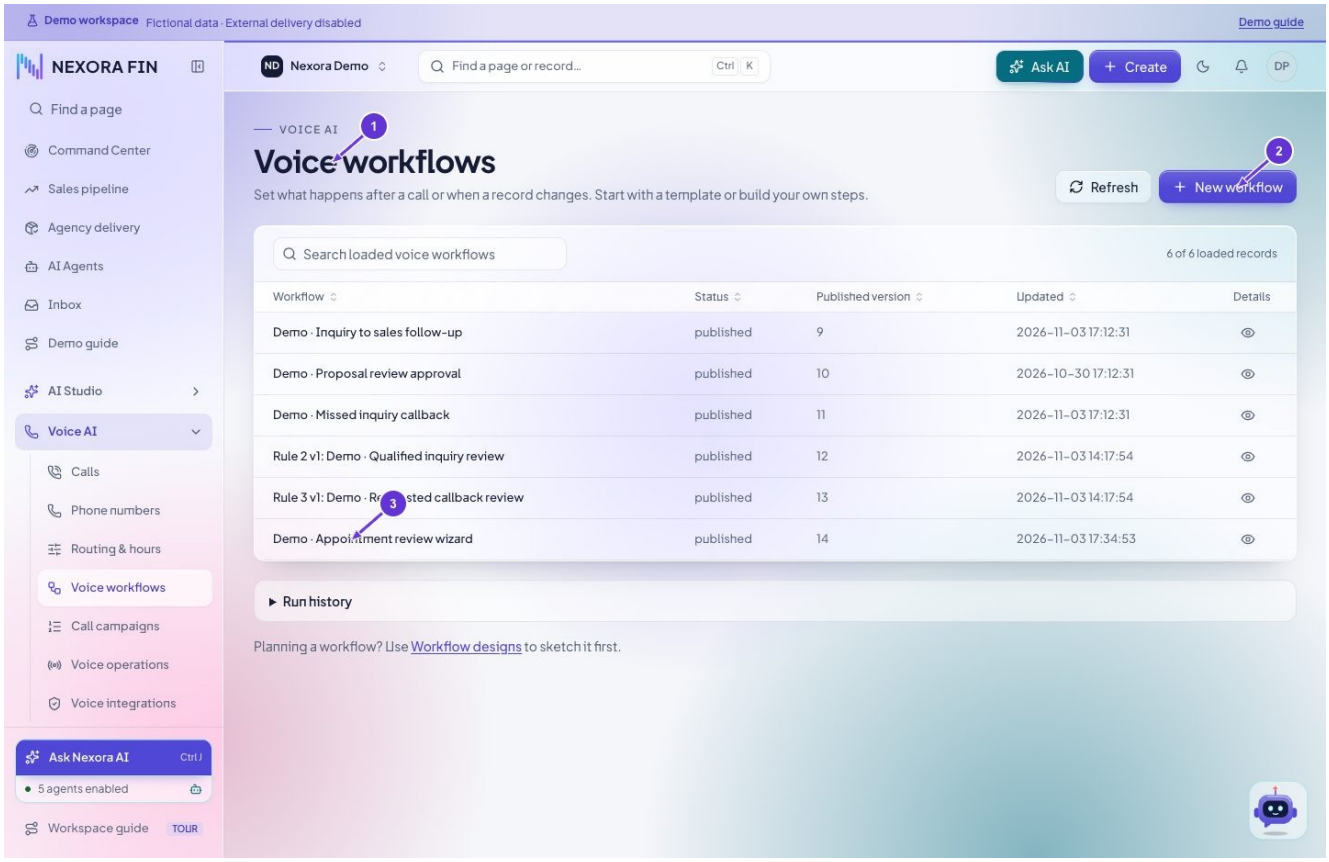


Figure 37 1 Voice workflows · 2 New workflow · 3 Demo · Appointment review wizard

Open in Nexora CRM

Voice workflows

Open Voice AI → Voice workflows and create or open a draft. In Wizard, select a supported scenario and set its agent, event and action options. Review Steps and Diagram, save the draft, validate and simulate where available, then publish. Use Set when it runs to bind the published version to the matching event. Verify the resulting run after a permitted real call.

Open in Nexora CRM

Build and publish a voice workflow

Create a draft and choose Wizard. Select the scenario, scope it to the agent and event, and choose the actions. Review Steps and Diagram. Save the draft, validate and simulate where supported, publish a version, then bind that version with Set when it runs. Use Run history to verify the trigger and actual effect.

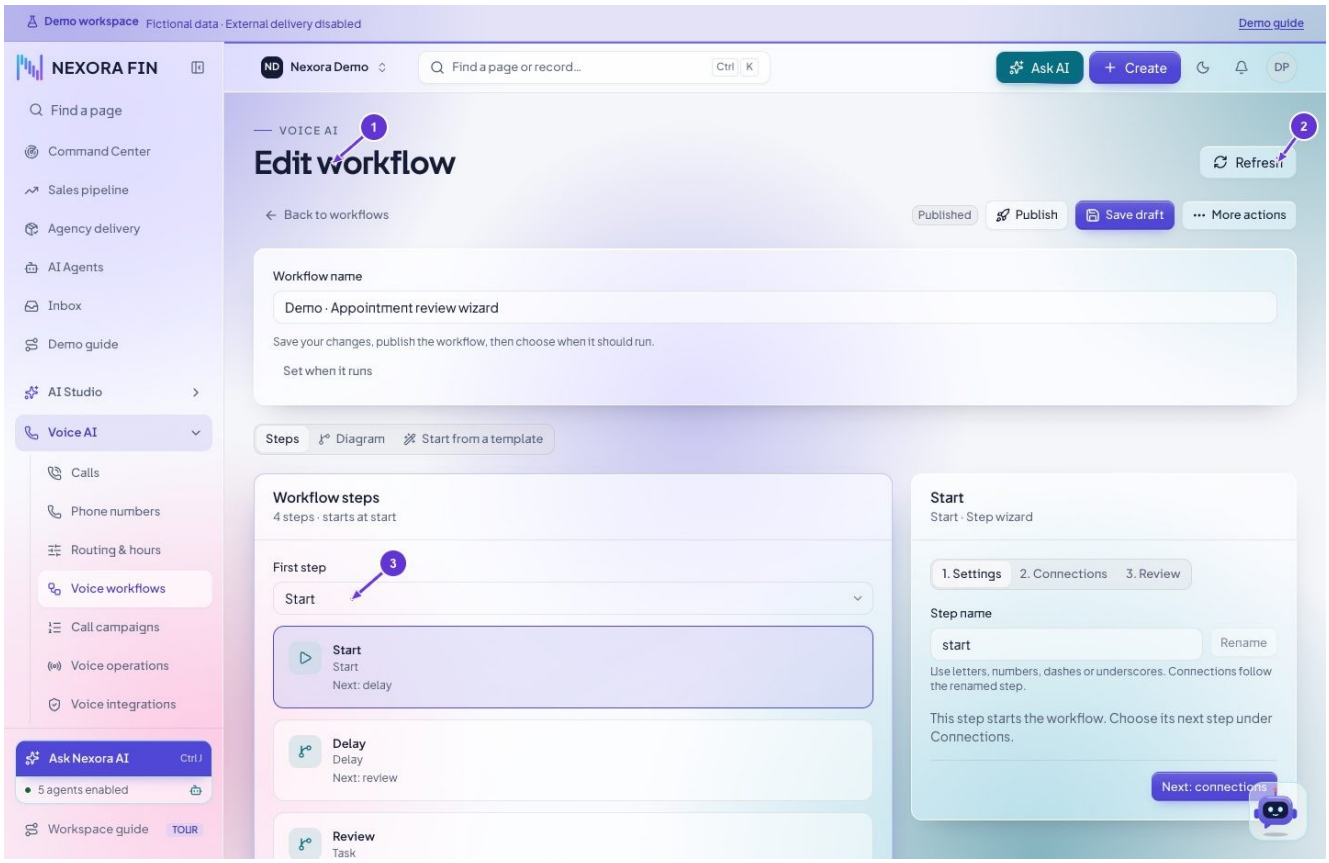


Figure 38 1 Edit workflow · 2 Refresh · 3 Start Delay Review End

Open in Nexora CRM

Voice workflow event binding

Open the published workflow and choose Set when it runs. Review the event, version, filters and enabled state, save the binding and verify a matching run in Run history.

Open in Nexora CRM

Voice workflow Run history

Open Voice AI → Voice workflows and select the workflow. Open Run history, find the run by time or originating event, and inspect version, status and individual steps. Compare the run with the matching call.

Open in Nexora CRM

Phone numbers

Open Voice AI → Phone numbers. Read the provider inventory and select the intended number. Review its transport and available capabilities. Use the assignment control to select the intended inbound agent and verify the provider readback. Verify separate outbound eligibility before placing a call.

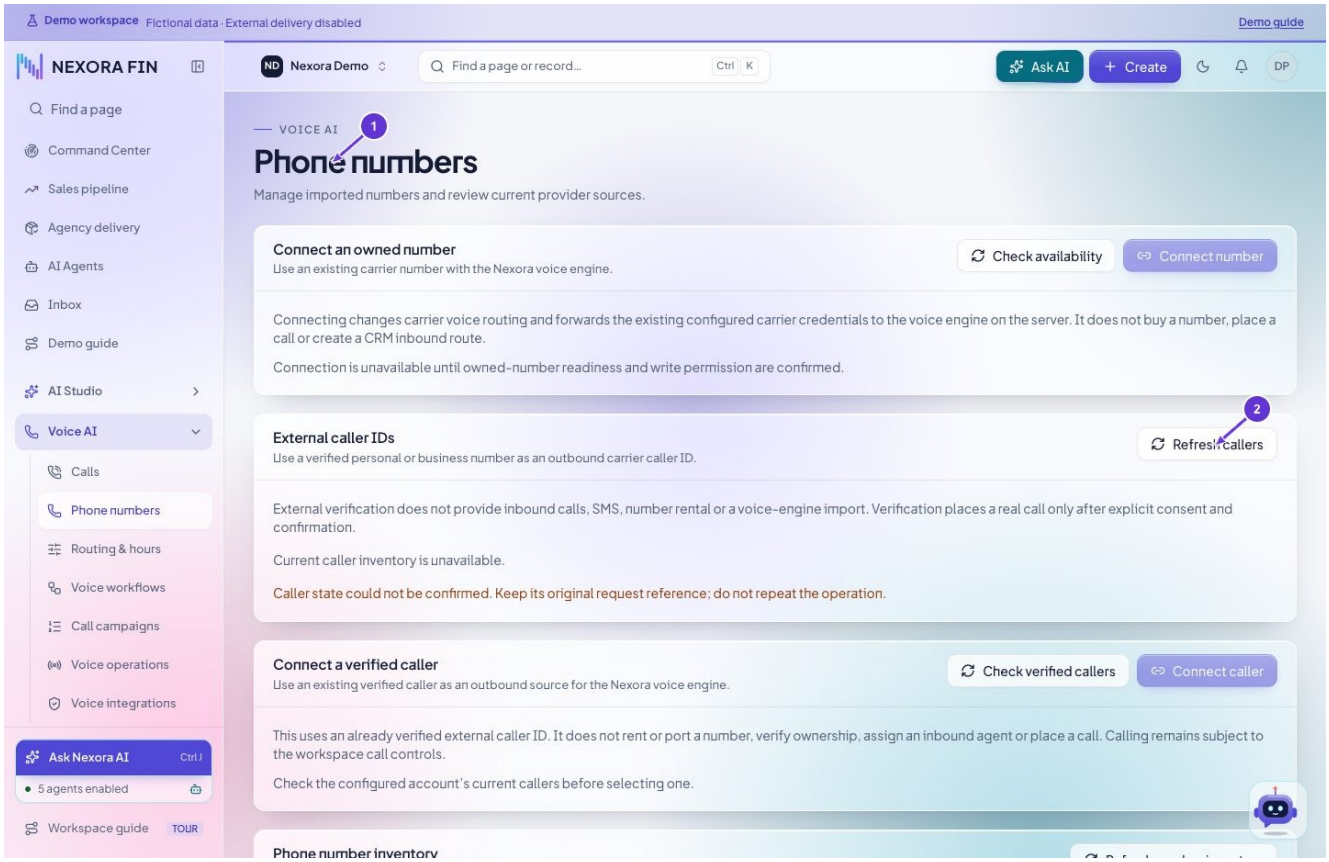


Figure 39 1 Phone numbers · 2 Refresh callers

Open in Nexora CRM

Routing and hours

Open Voice AI → Routing & hours. Review the applicable number, office schedule, time zone and fallback. Save the intended rule and verify its priority and active state. Check the inbound call record after a permitted call.

Open in Nexora CRM

Voice operations

Open Voice AI → Voice operations. Check application outbound Hold, destination consent, an eligible caller ID and the intended agent. Review the call before submitting it. Read provider status and workflow evidence afterward.

Open in Nexora CRM

Inbox

Open Inbox and select the relevant conversation or message. Check the channel and recipient before composing a reply. Use the enabled send control and verify the provider outcome. An accepted message is still awaiting final delivery evidence.

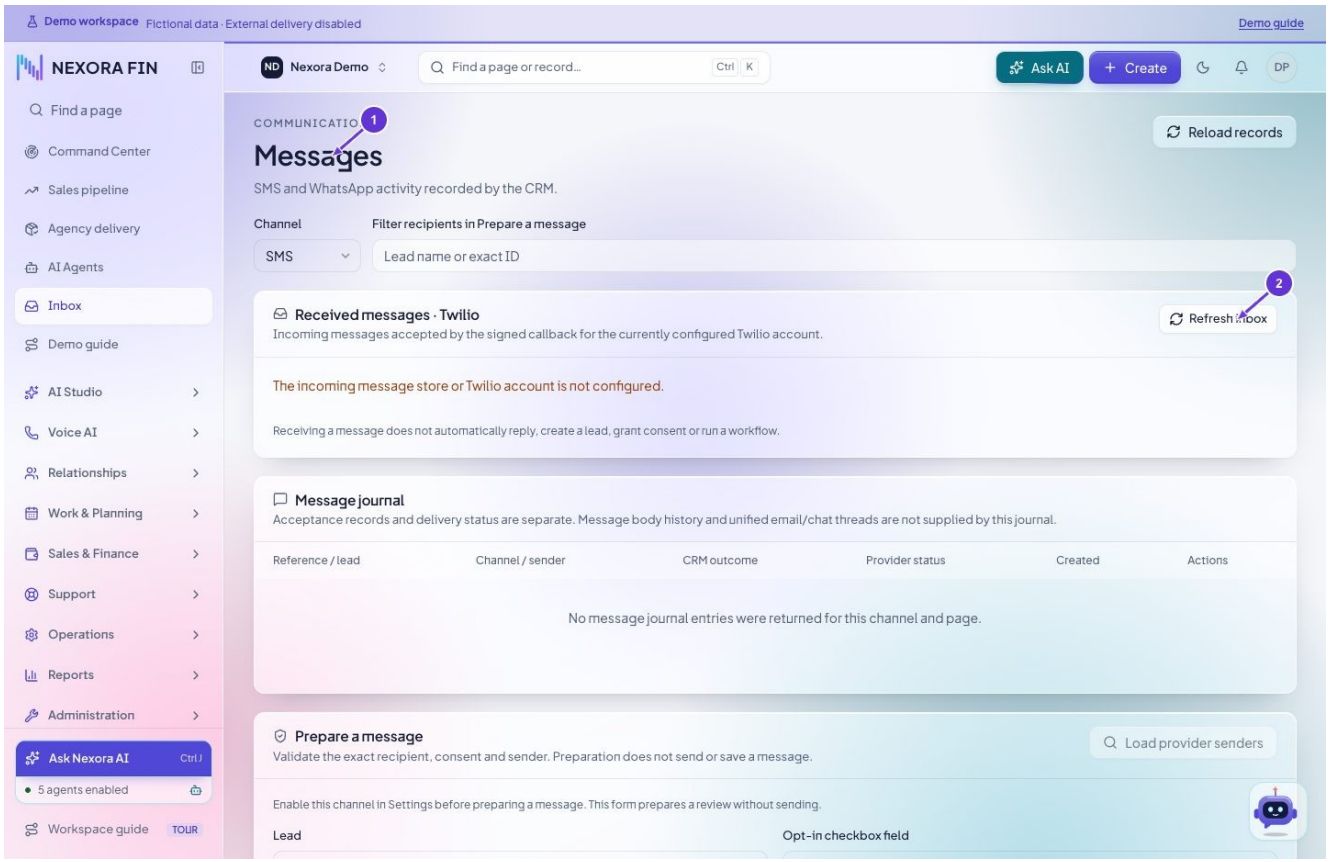


Figure 40 1 Messages · 2 Refresh inbox

Open in Nexora CRM

Call campaigns

Open Voice AI → Call campaigns. Prepare an audience with the appropriate consent, choose the agent and number, and review schedule and recipient validation before submission. Check Hold and provider readiness. Review outcomes per recipient in the campaign history.

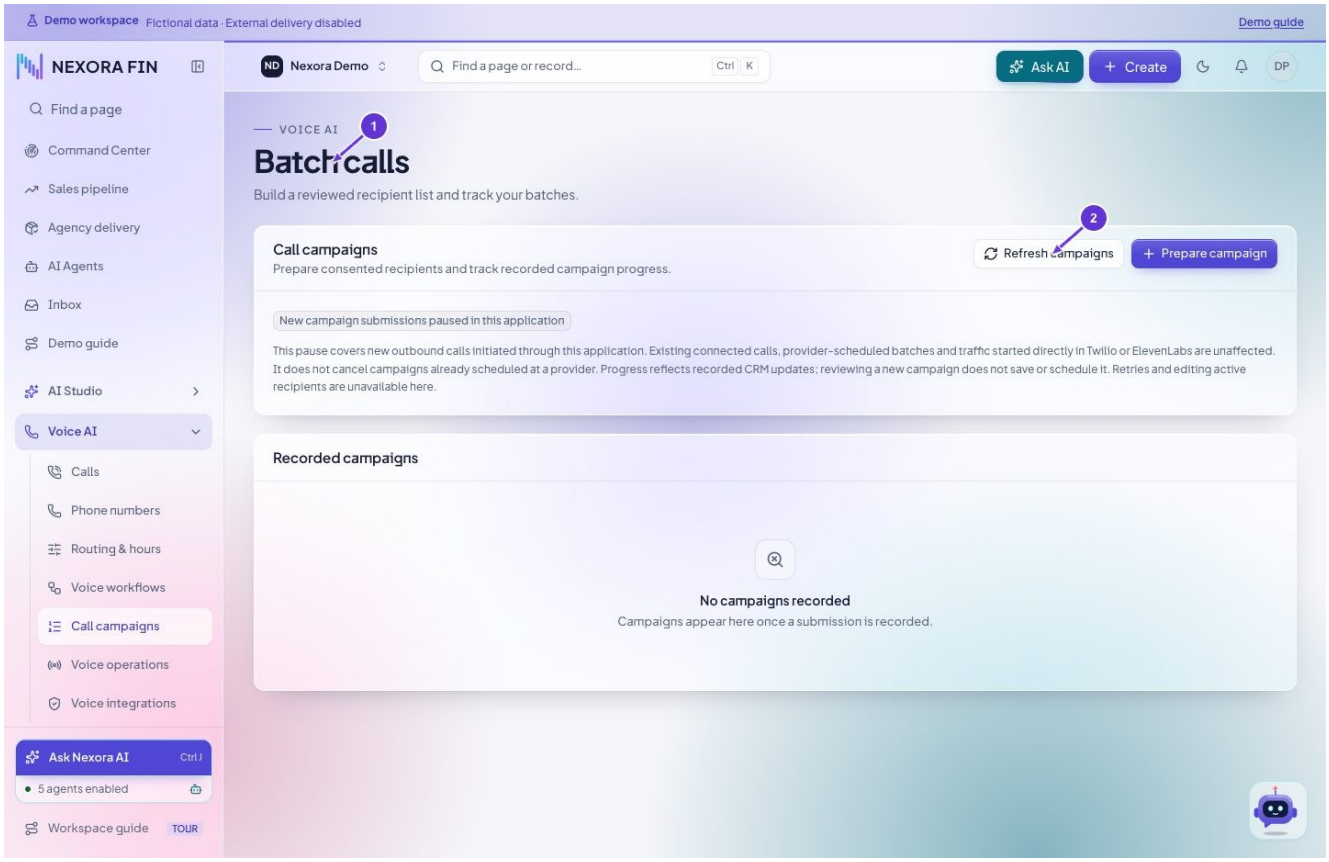


Figure 41 1 Batch calls · 2 Refresh campaigns

Open in Nexora CRM

Voice integrations

Open Voice AI → Voice integrations. Choose Twilio or ElevenLabs, review the existing configuration and use the available connection check. Check inventory and callback configuration separately. Successful read access establishes account access. actual calls and callback delivery are separate checks.

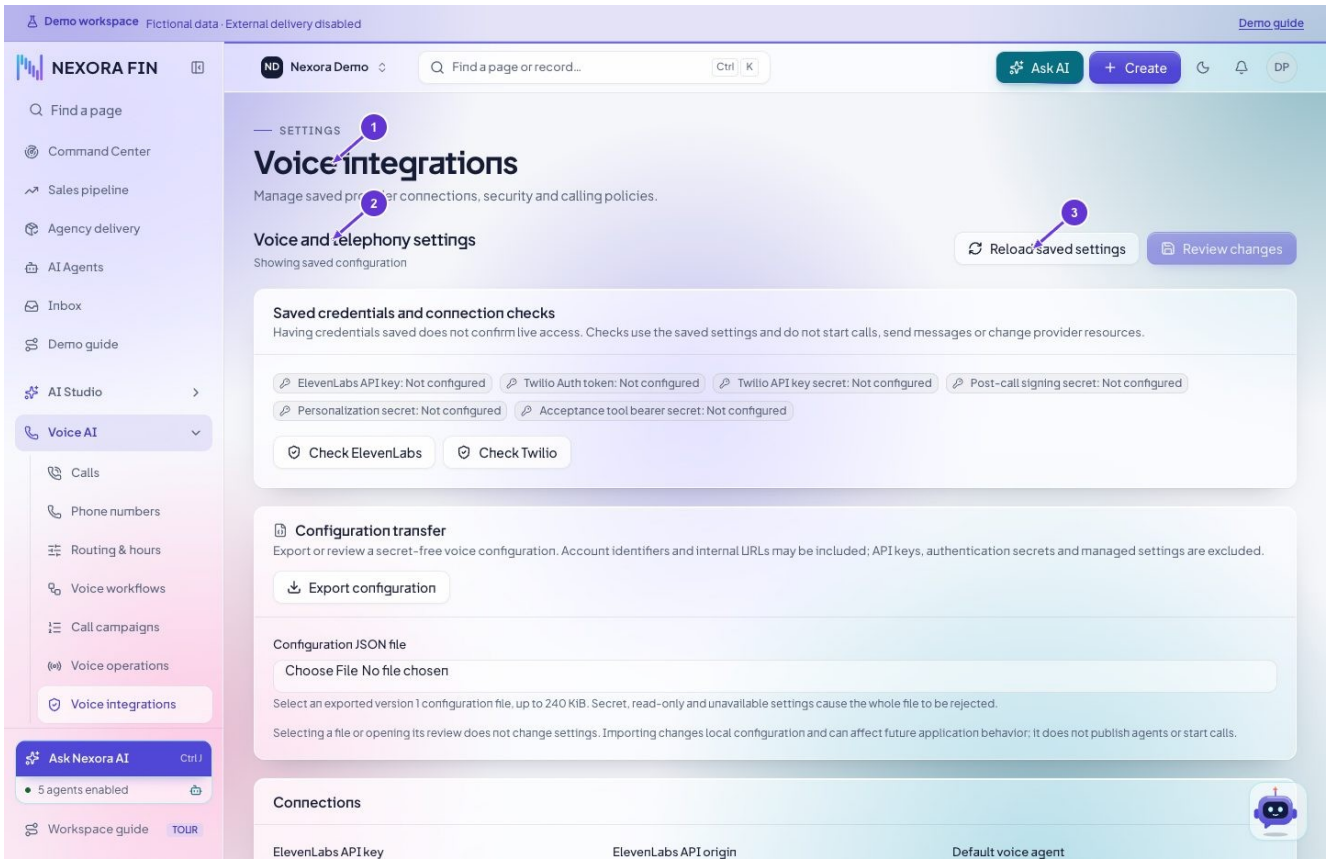


Figure 42 1 Voice integrations · 2 Voice and telephony settings · 3 Reload saved settings

Open in Nexora CRM

Automations

Open Operations → Automations and choose the recipe or workflow you want to inspect. Review its trigger, conditions and enabled state. For live voice events, use Voice workflows and the event binding. Verify execution in the relevant run history.

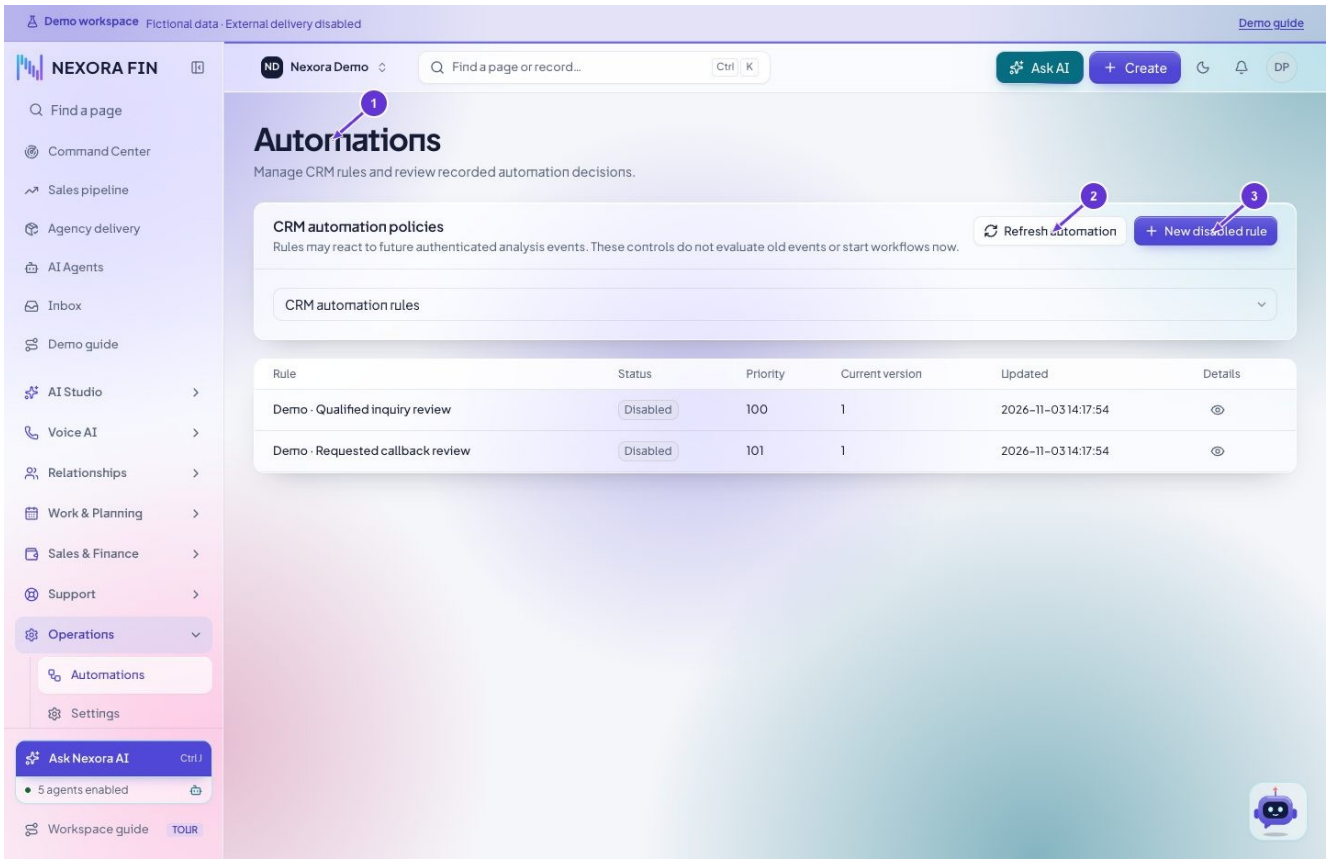


Figure 43 1 Automations · 2 Refresh automation · 3 New disabled rule

Open in Nexora CRM

Saved campaigns

Open saved campaigns to inspect status and recorded progress. Review the matching batch or individual call for outcomes.

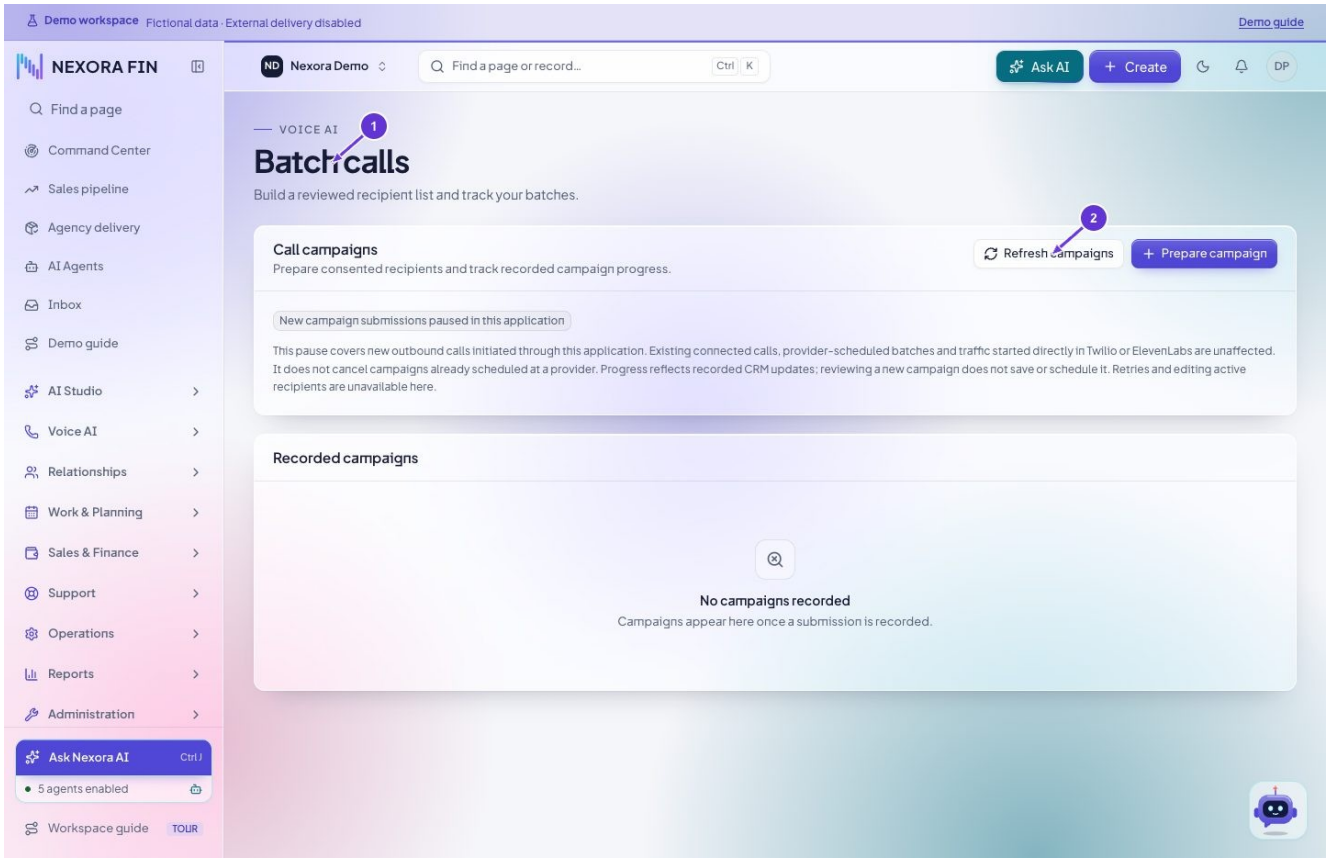


Figure 44 1 Batch calls · 2 Refresh campaigns

Open in Nexora CRM

Voice connection health

Open Voice connection health. Review provider, worker and callback states and the latest recorded checks. compare timestamps before deciding which dependency needs attention.

Open in Nexora CRM

Troubleshoot voice calls

Start with the direction, number, agent and time of the failed call. Compare provider status and signed events, then open Calls or Fix missing call records for the affected record.

Open in Nexora CRM

Voice products

Review the provider product, its available features, and applicable account restrictions. Verify number eligibility and pricing with the provider before use.

Open in Nexora CRM

Voice setup checklist

Work through connection checks, agent and number assignment, routing, and test calls. Read back each result and investigate any item without evidence.

Open in Nexora CRM

Signed call events

Review the managed callback URL and configured events. Verify the signing setup and confirm an authorized provider event arrives in Call event delivery.

Open in Nexora CRM

Call event delivery

Filter by event, delivery status or conversation ID. Inspect the timestamp and verification result. compare with the corresponding call.

Open in Nexora CRM

ElevenLabs Twilio dialer

Check the selected agent, caller number, destination consent and application Hold. Review the exact call before submission and confirm the provider outcome.

Open in Nexora CRM

Inbound calls

Filter by number, status or time and open the incoming call. Compare the assigned agent, routing decision and resulting call record.

Open in Nexora CRM

SMS and WhatsApp messaging

Choose the channel and review the sender, recipient, consent and content. Use the reviewed send flow if enabled and check the recorded delivery outcome.

Open in Nexora CRM

Workflow triggers

Select the event and published workflow version, review agent or number filters, then save the binding. Confirm its enabled state and check Run history after a matching event.

Open in Nexora CRM

Fix missing call records

Look up the exact conversation reference, compare provider and CRM records, and review the reconciliation details before confirming the offered action.

Open in Nexora CRM

Voice settings

Review provider connections and calling policies, then open the relevant configuration and verify its connection and number assignment.

Open in Nexora CRM

Voice number management

Find the number and review its provider, agent assignment and routing. Verify the number identity before changing the binding.

Open in Nexora CRM

ElevenLabs phone numbers

Select an imported number, verify its identifier and agent assignment, and confirm the provider readback after any authorized change.

Open in Nexora CRM

Telephony numbers

Review the provider numbers and supported call or message capabilities. Check assignment and ownership before using a number.

Open in Nexora CRM

Caller IDs

Review eligible and verified caller IDs. Select the intended identity and confirm its verification and outbound eligibility.

Open in Nexora CRM

Telephony billing

Review the available account and usage figures for the selected period. Confirm actual charges in the carrier billing view.

Open in Nexora CRM

ElevenLabs settings

Open Voice settings and select ElevenLabs. Review the account and masked credentials, save any intended change, then verify the connection.

Open in Nexora CRM

Telephony settings

Open Voice settings and select telephony. Review carrier credentials and calling policies, save any intended change, then verify the connection.

Open in Nexora CRM

Inbound call settings

Open Voice settings, review the incoming-call connection and routing, then verify an authorized test call reaches the intended agent.

Open in Nexora CRM

06 Sales documents and finance

From sales draft to settlement

Prepare a proposal or estimate, then use the available conversion action where approved. Verify the invoice and its totals before sending. Record the payment against the exact invoice. Review credits or refunds against their source records and verify the remaining balance.

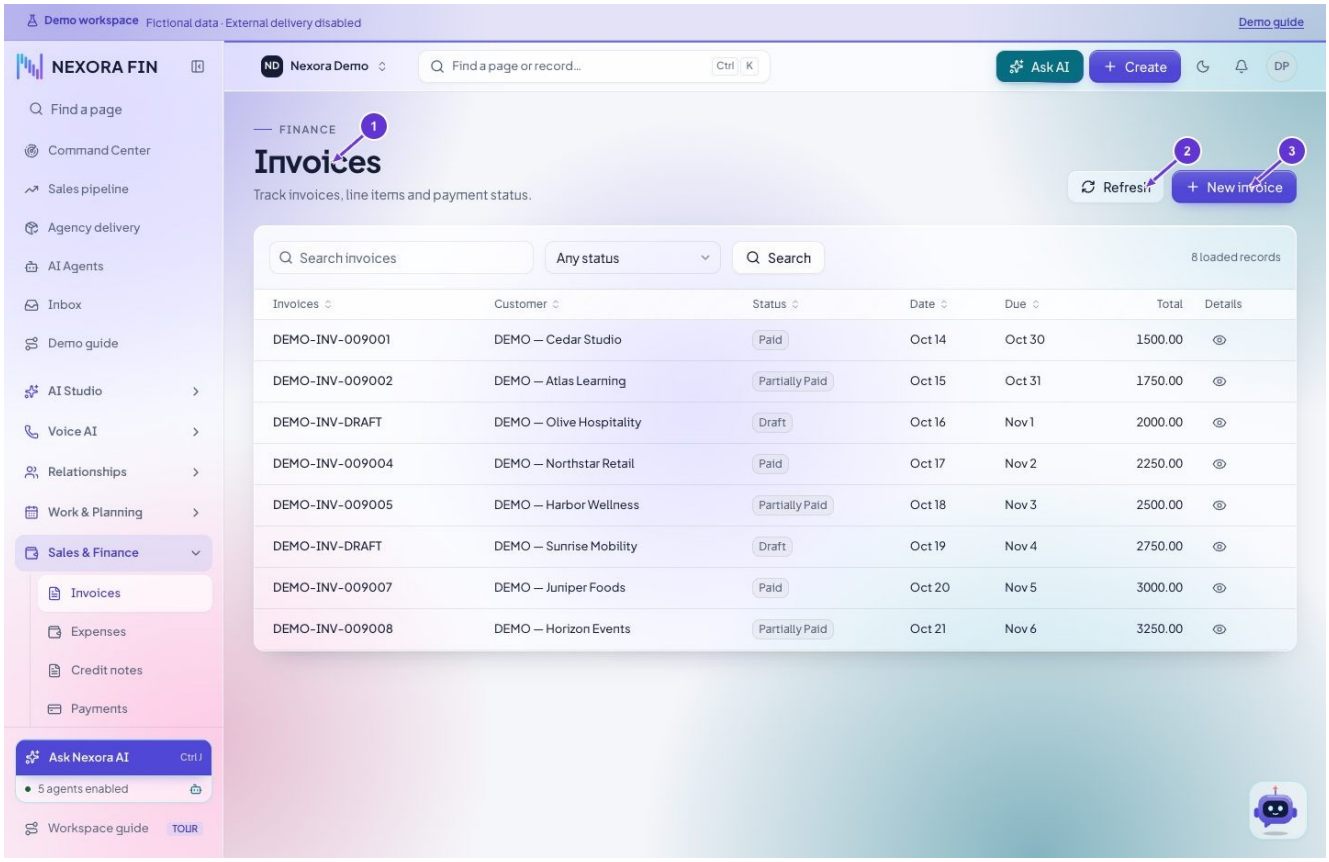


Figure 45 1 Invoices · 2 Refresh · 3 New invoice

Open in Nexora CRM

Invoices

Open Sales & Finance → Invoices. Select the customer, add line items, and review currency, taxes and due date before saving. Open the invoice to verify its totals and status. Review the recipient and delivery configuration separately before sending.

Open in Nexora CRM

Payments

Open Sales & Finance → Payments. Identify the related invoice and check amount, currency, date and payment mode. Review before recording a payment. Confirm the saved entry and invoice balance before repeating an uncertain operation.

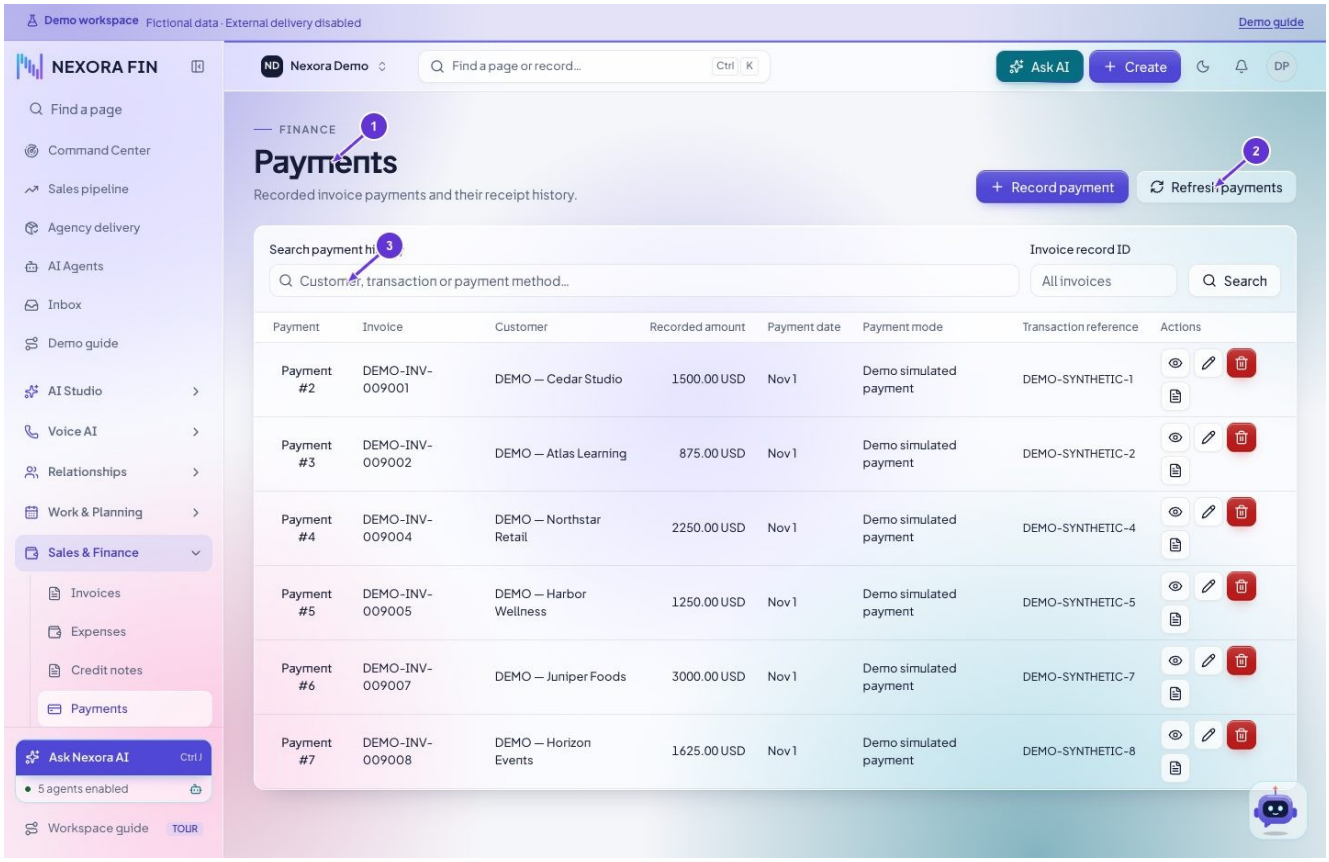


Figure 46 1 Payments · 2 Refresh payments · 3 Search payment history

Open in Nexora CRM

Expenses

Open Sales & Finance → Expenses. Select a category, complete the date, amount and currency, and link a customer if applicable. Save and reopen the expense. Check the billable setting before adding it to an invoice.

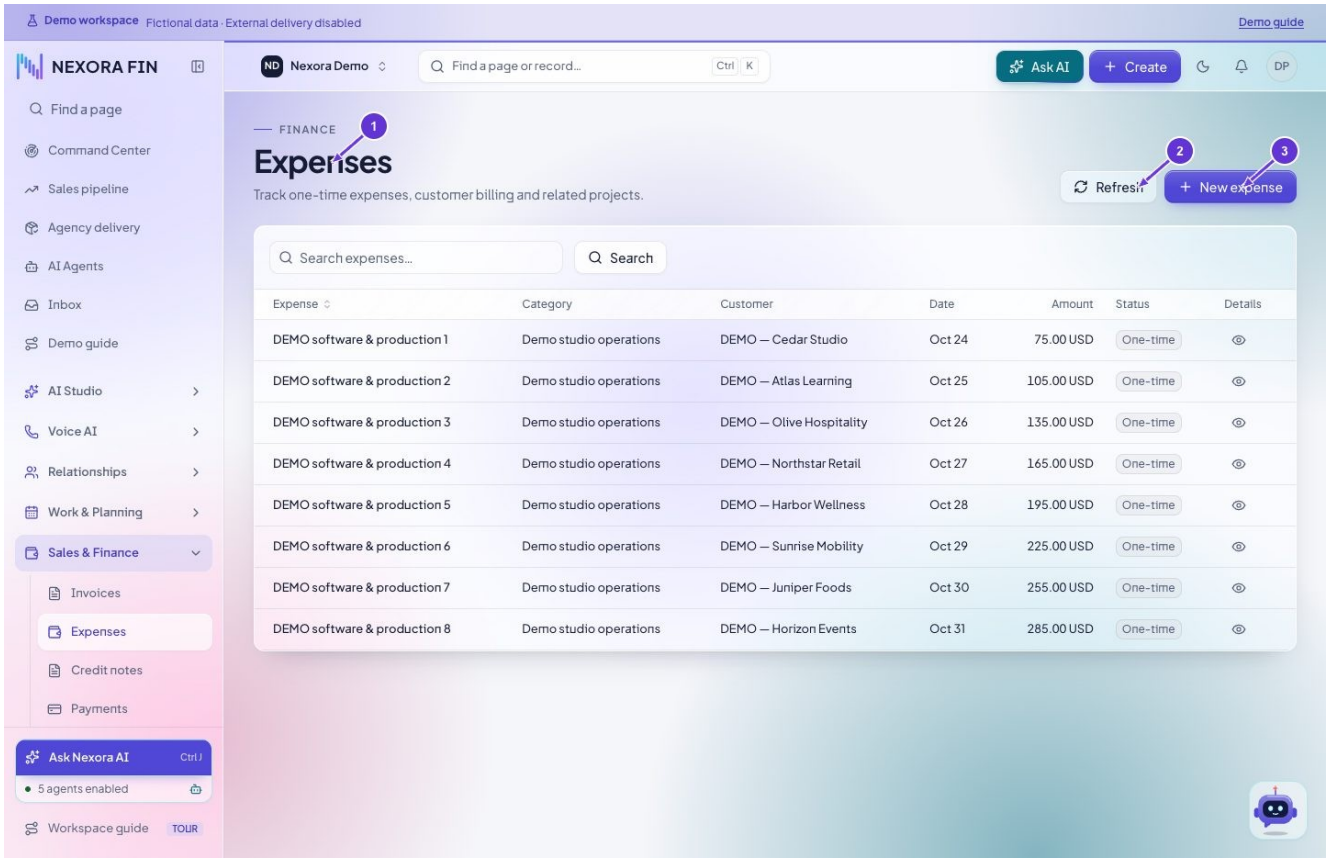


Figure 47 1 Expenses · 2 Refresh · 3 New expense

Open in Nexora CRM

Estimates

Open Sales & Finance → Estimates. Choose a customer, set dates and line items, save and inspect the preview. Check the saved total and status before using any separate send or conversion action.

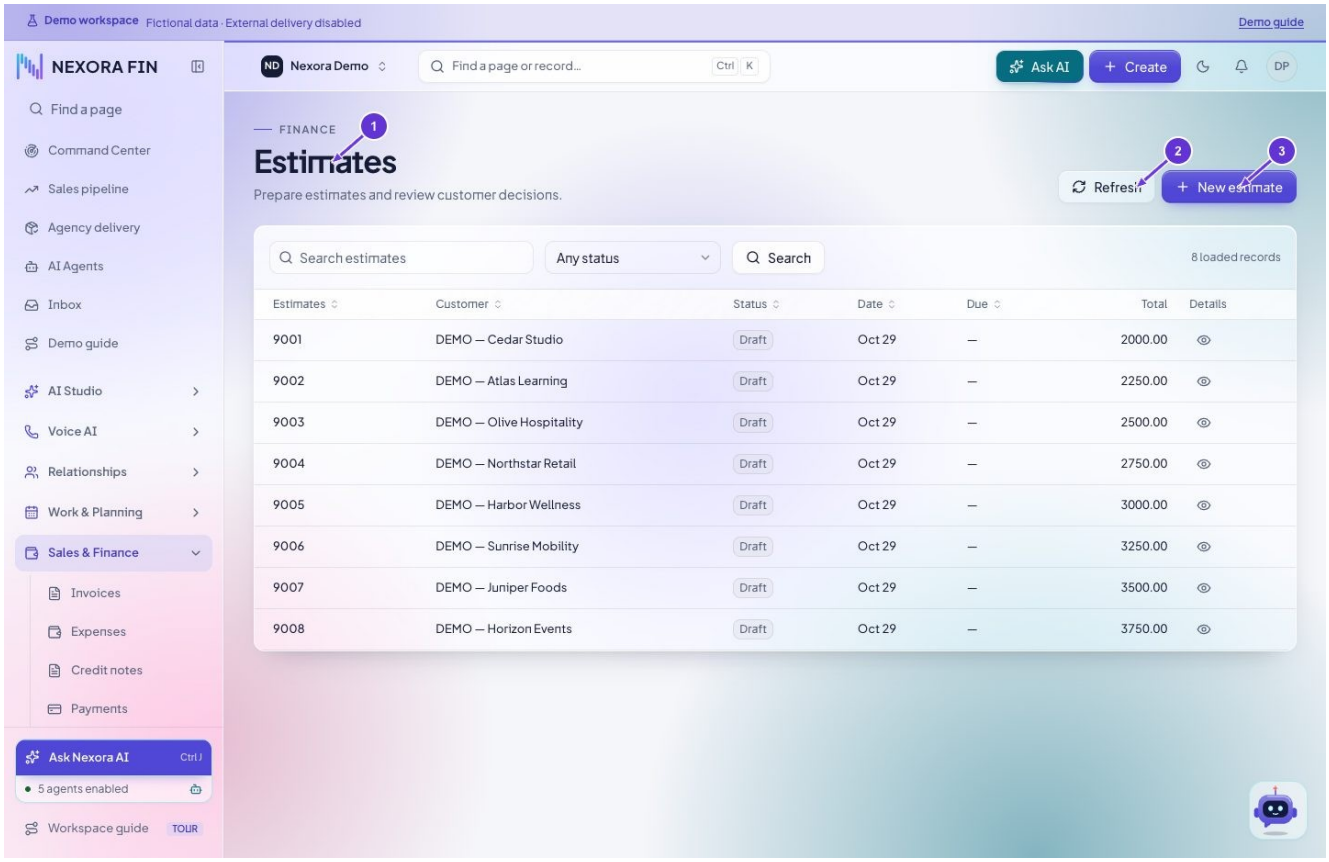


Figure 48 1 Estimates · 2 Refresh · 3 New estimate

Open in Nexora CRM

Proposals

Open Sales & Finance → Proposals. Link the available lead or customer, add subject, dates and items, then save. Open the preview and verify the content before any send action.

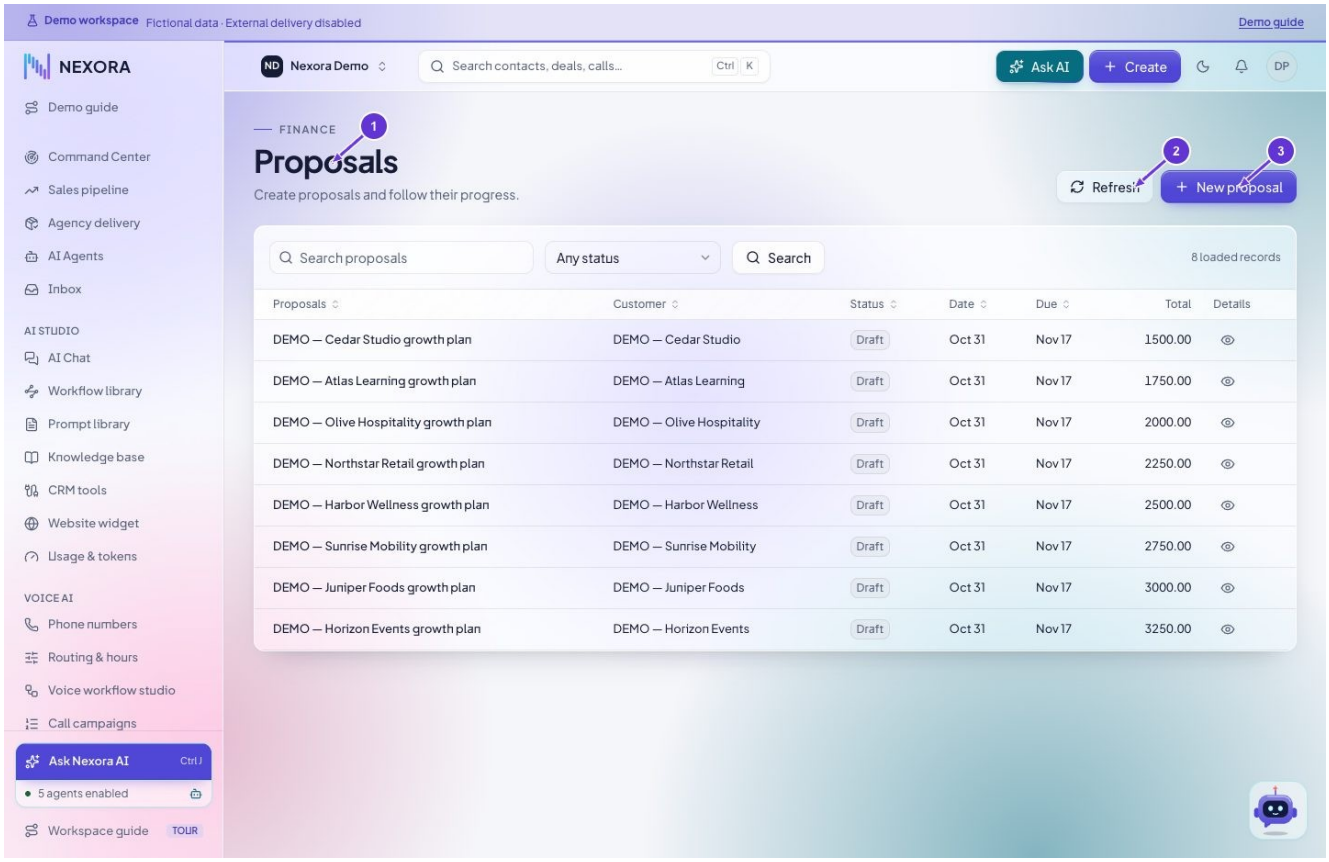


Figure 49 1 Proposals · 2 Refresh · 3 New proposal

Open in Nexora CRM

Contracts

Open Sales & Finance → Contracts. Choose the customer and contract type, enter the subject and dates, save and reopen the record. Review the actual signing status in its details.

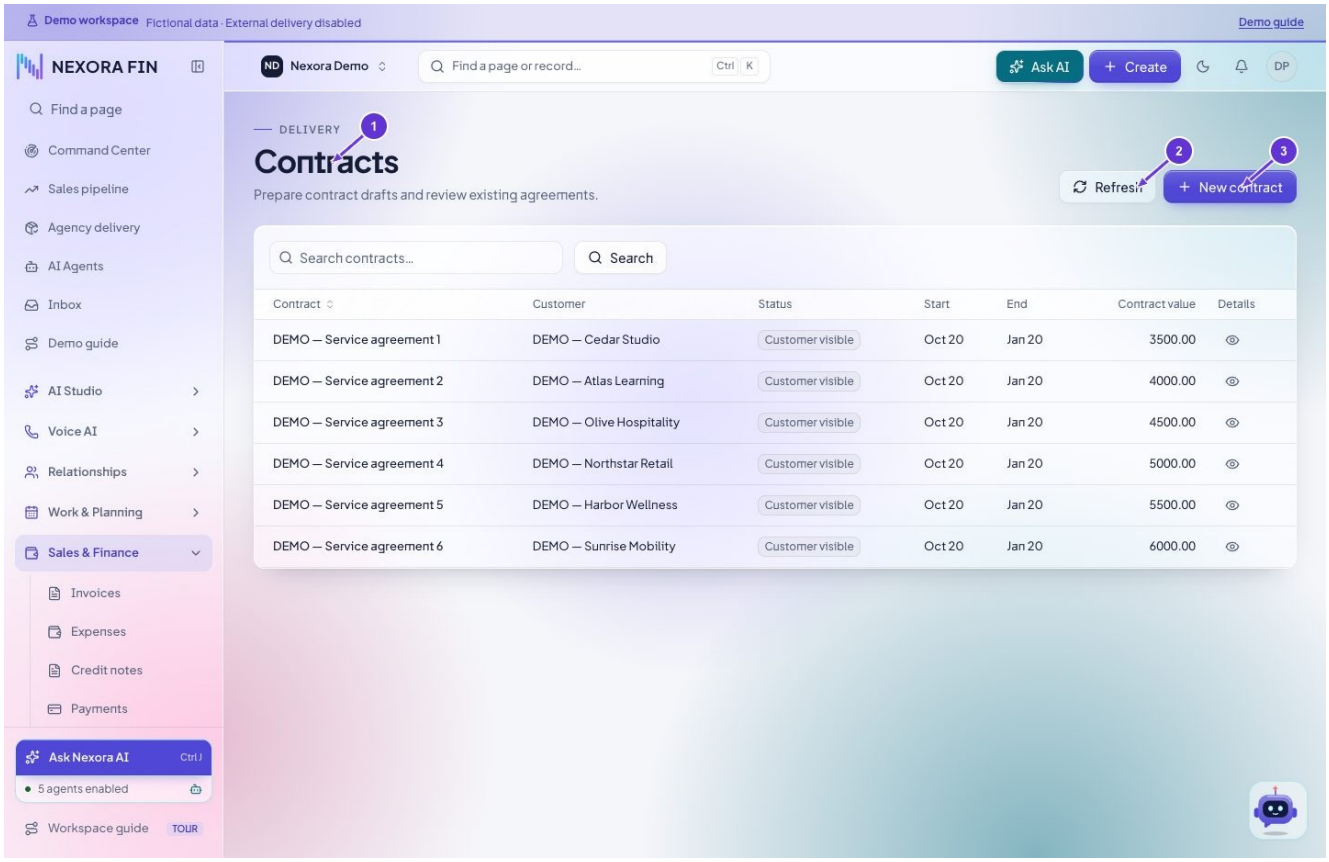


Figure 50 1 Contracts · 2 Refresh · 3 New contract

Open in Nexora CRM

Credit notes

Open Sales & Finance → Credit notes. Select the customer, verify the lines and currency and save. Open the credit note to check its balance and available apply or refund actions. Verify the accounting entry after using either action.

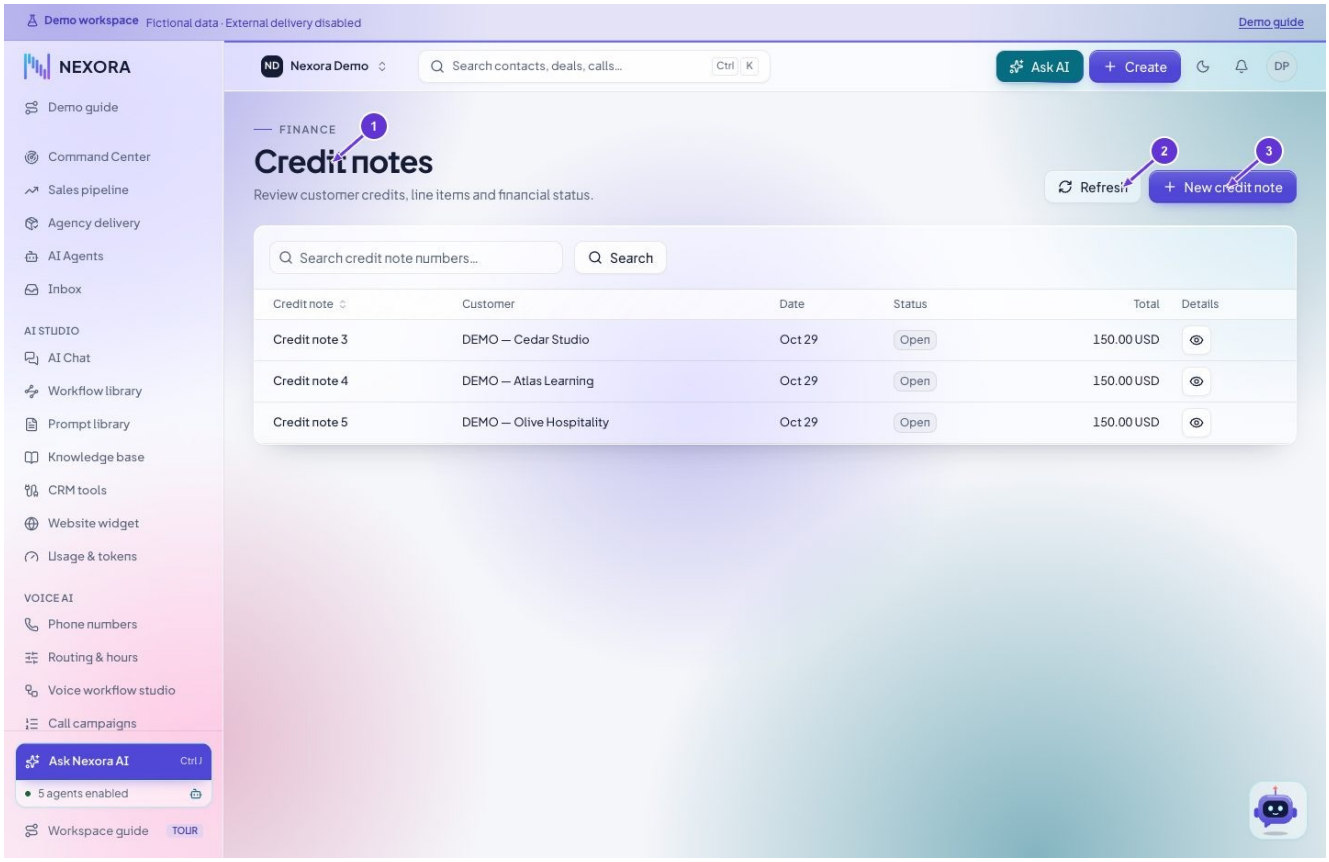


Figure 51 1 Credit notes · 2 Refresh · 3 New credit note

Open in Nexora CRM

Payment recovery

Look up the exact invoice and payment attempt. Compare the recorded provider reference and settlement state before following the available recovery action.

Open in Nexora CRM

Invoice items

Find the existing item first, then create or edit the item name, unit, rate and tax as permitted. Verify the item before reusing it on an invoice.

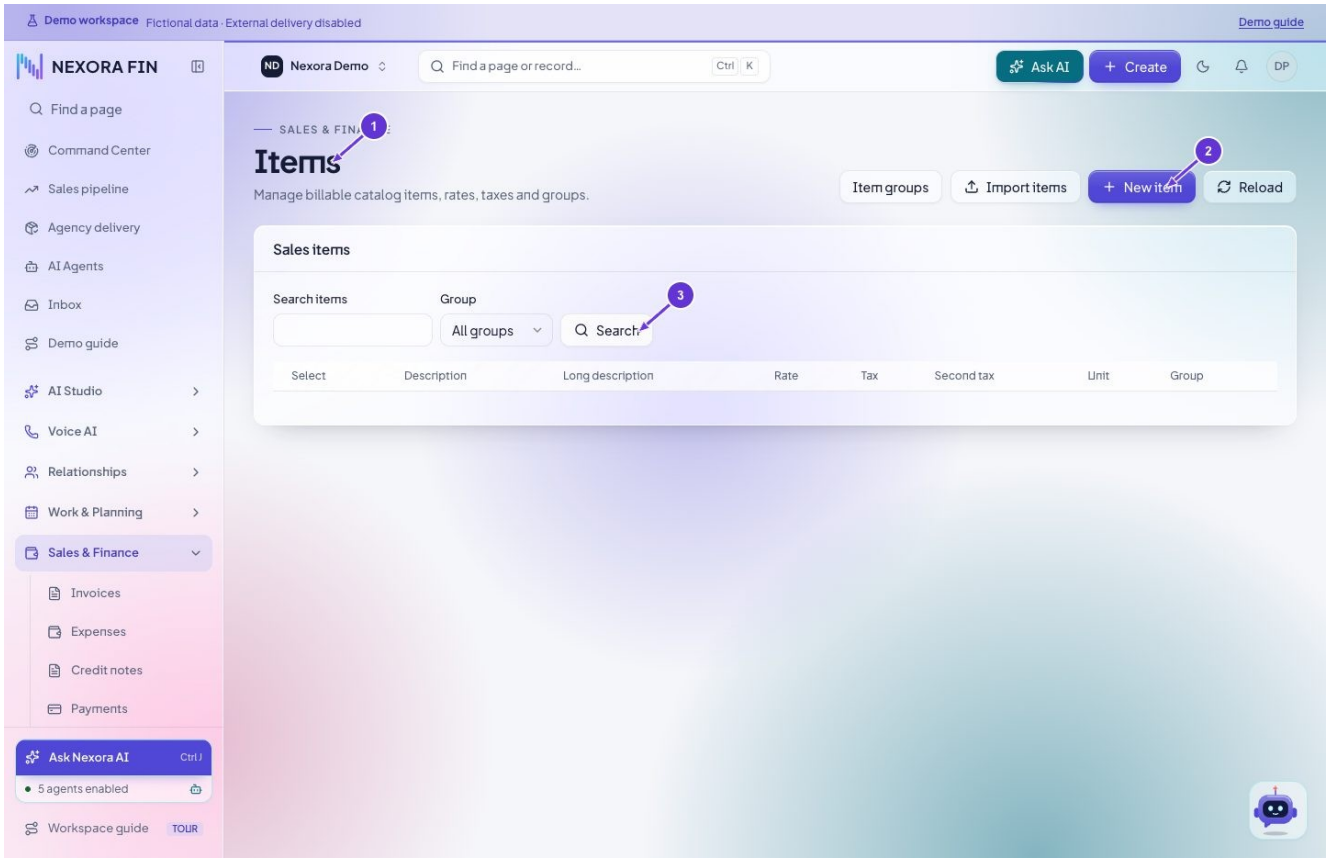


Figure 52 1 Items · 2 New item · 3 Search

Open in Nexora CRM

Subscriptions

Open the subscription to review the customer, amount, interval and recorded status. Check the billing provider before assuming that future payments are active.

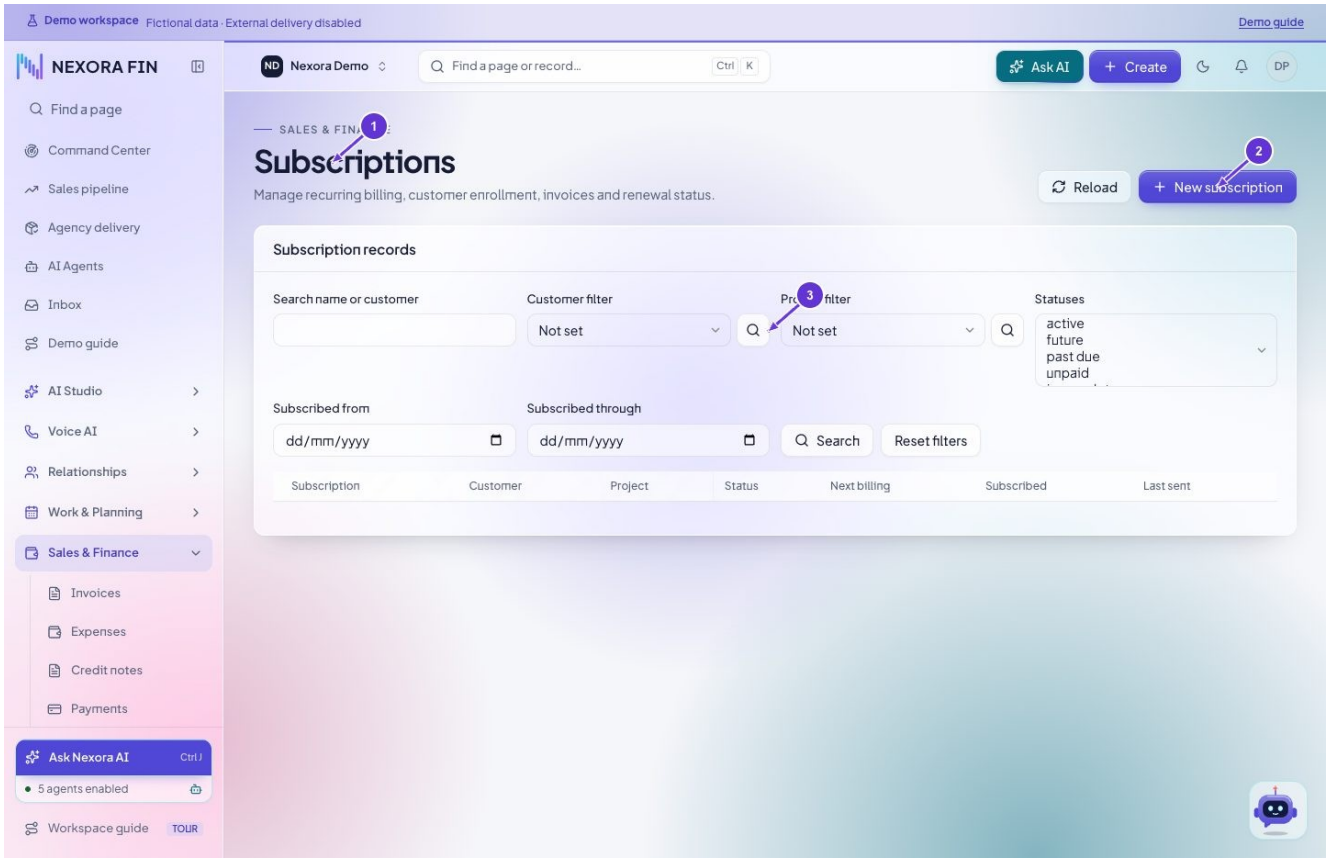


Figure 53 1 Subscriptions · 2 New subscription · 3 Search Customer filter

Open in Nexora CRM

Estimate requests

Find the submitted request, inspect its details and current status, then follow the available review or conversion action.

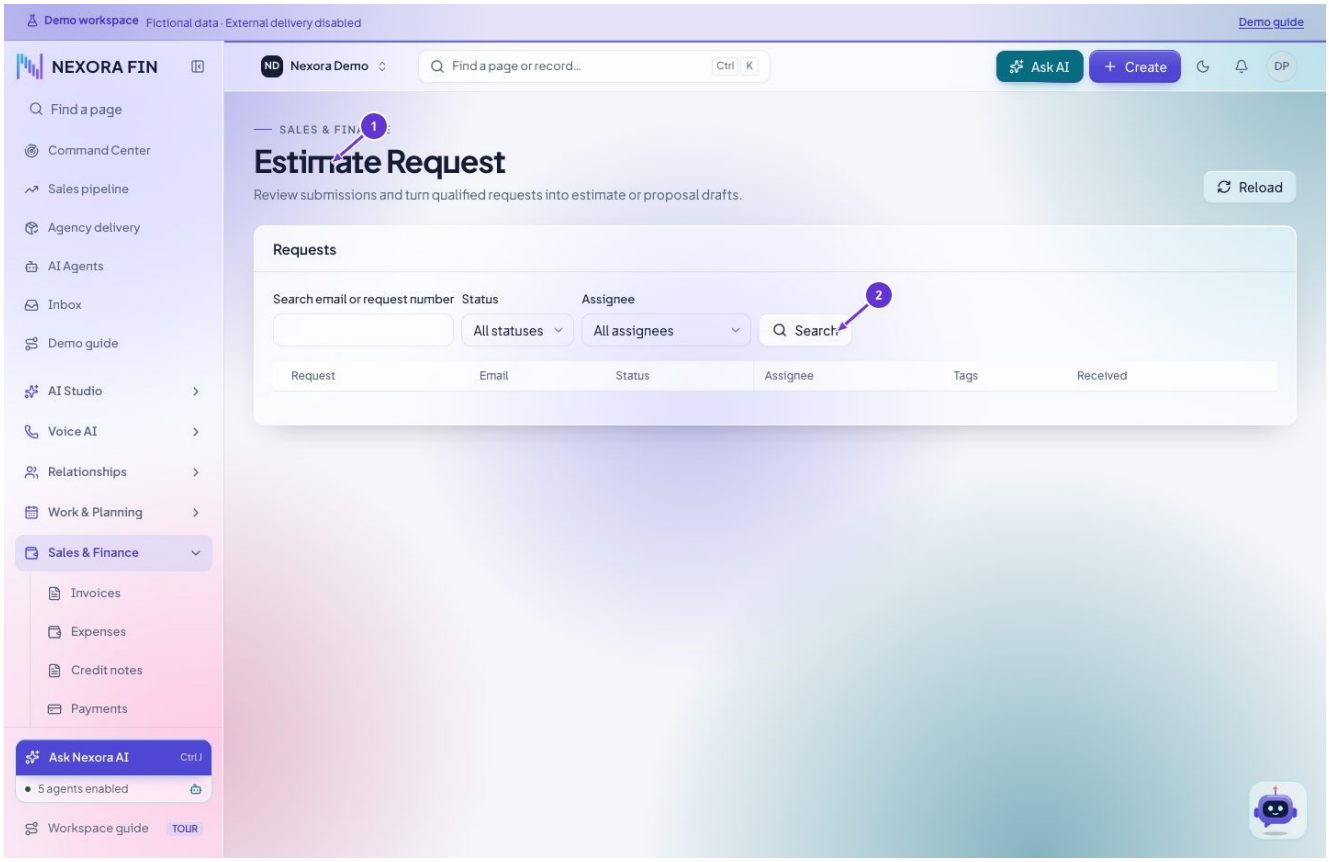


Figure 54 1 Estimate Request · 2 Search

Open in Nexora CRM

Estimate request forms

Select or create the form, review its fields and assignment, save, and test a controlled submission against Estimate requests.

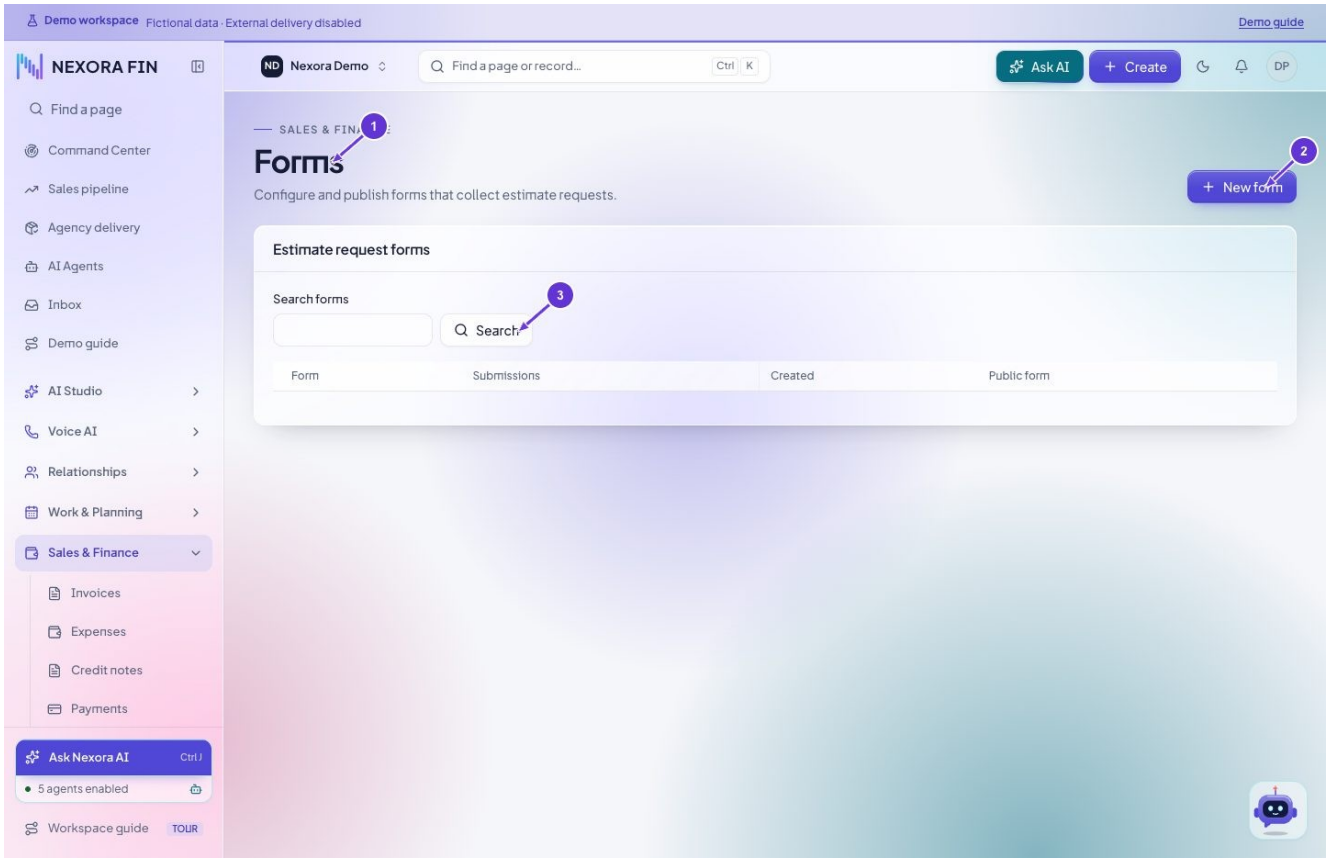


Figure 55 1 Forms · 2 New form · 3 Search

Open in Nexora CRM

Estimate request statuses

Create or edit the status name and order, save, and check it appears on an estimate request.

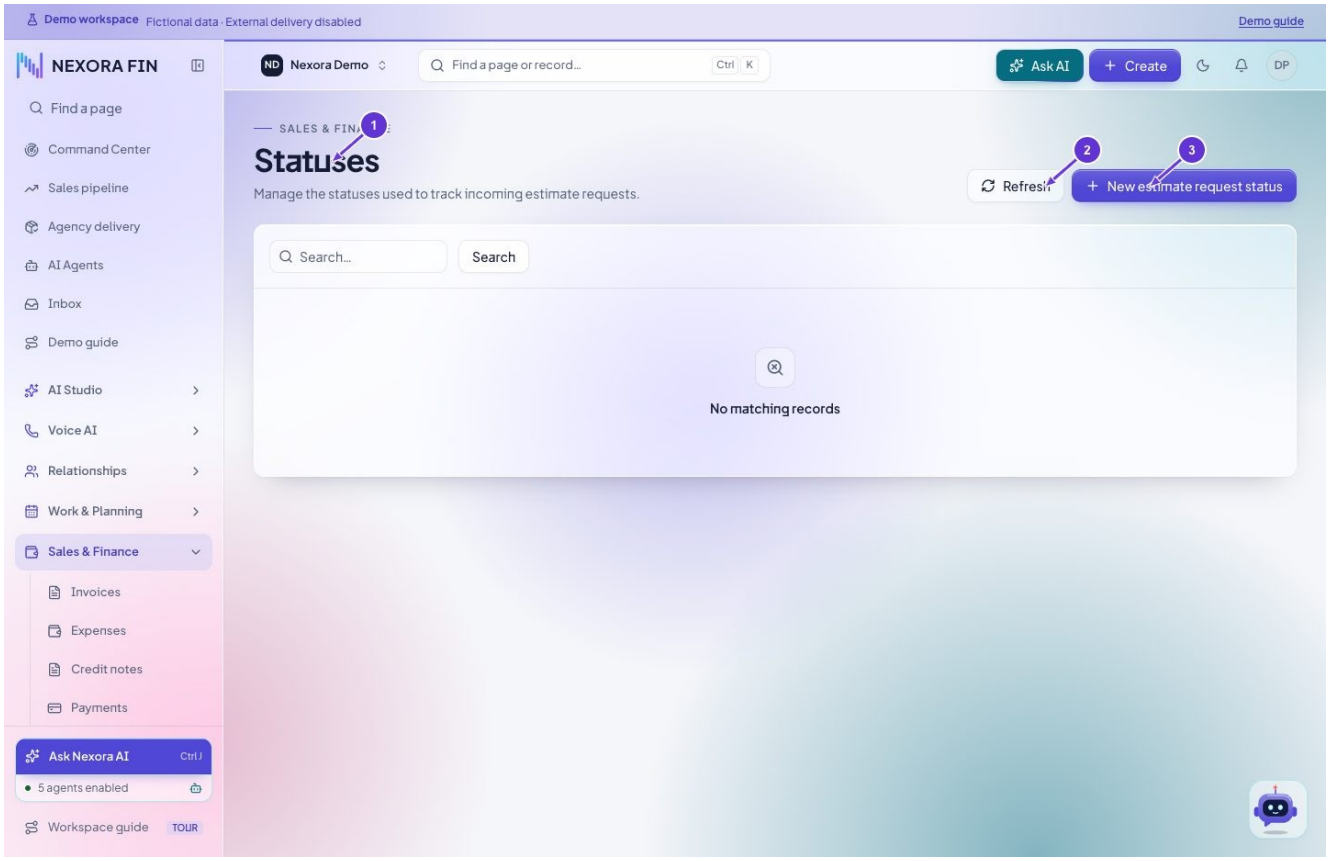


Figure 56 1 Statuses · 2 Refresh · 3 New estimate request status

Open in Nexora CRM

07 Customer support

Support tickets

Open Support → Support tickets. Search by subject or filter by status, then open a ticket within your assigned scope to inspect its status and activity. Reply or create a ticket only if the corresponding control is available to your account.

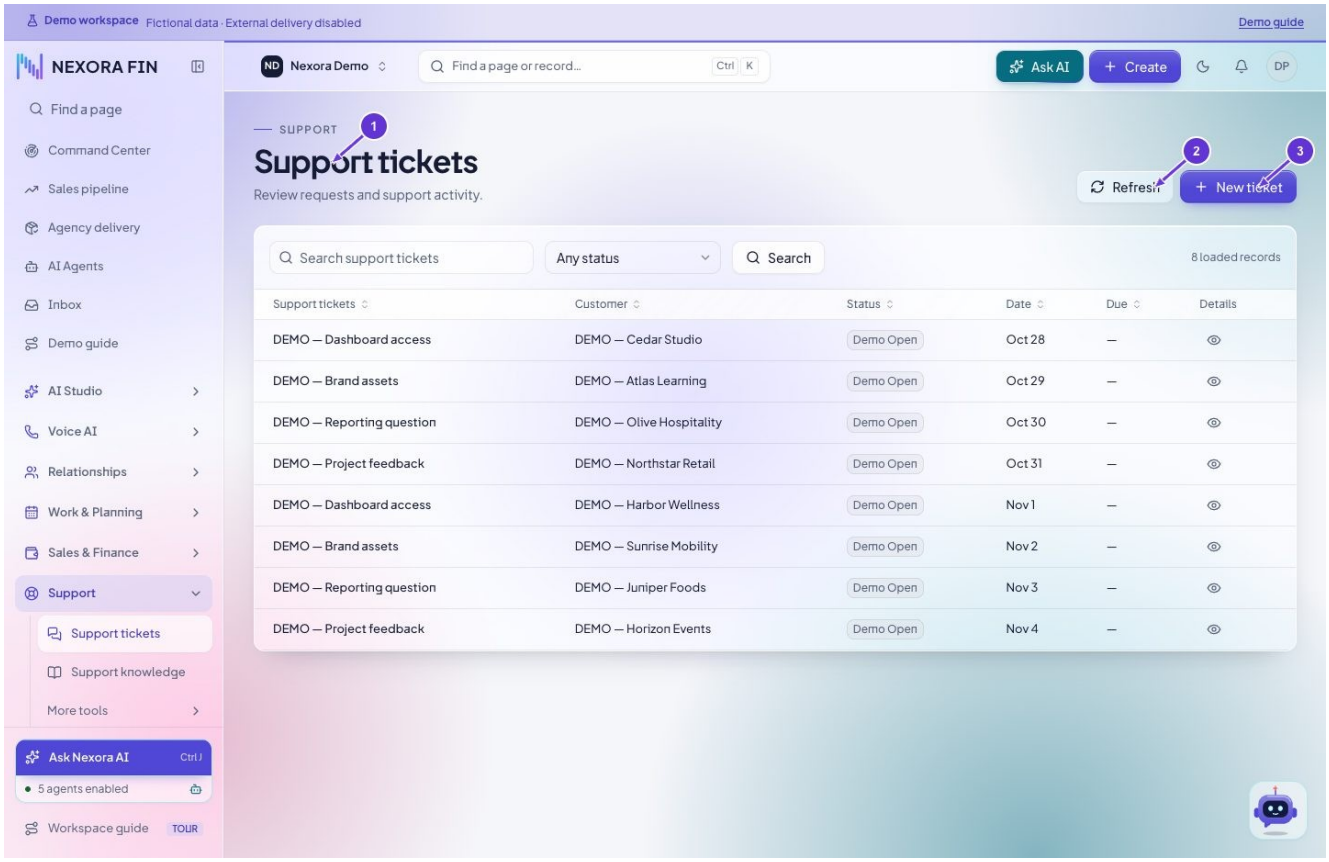


Figure 57 1 Support tickets · 2 Refresh · 3 New ticket

Open in Nexora CRM

Support knowledge

Open Support → Support knowledge. Select the article and verify its category and visibility. Preview the published result for the intended audience.

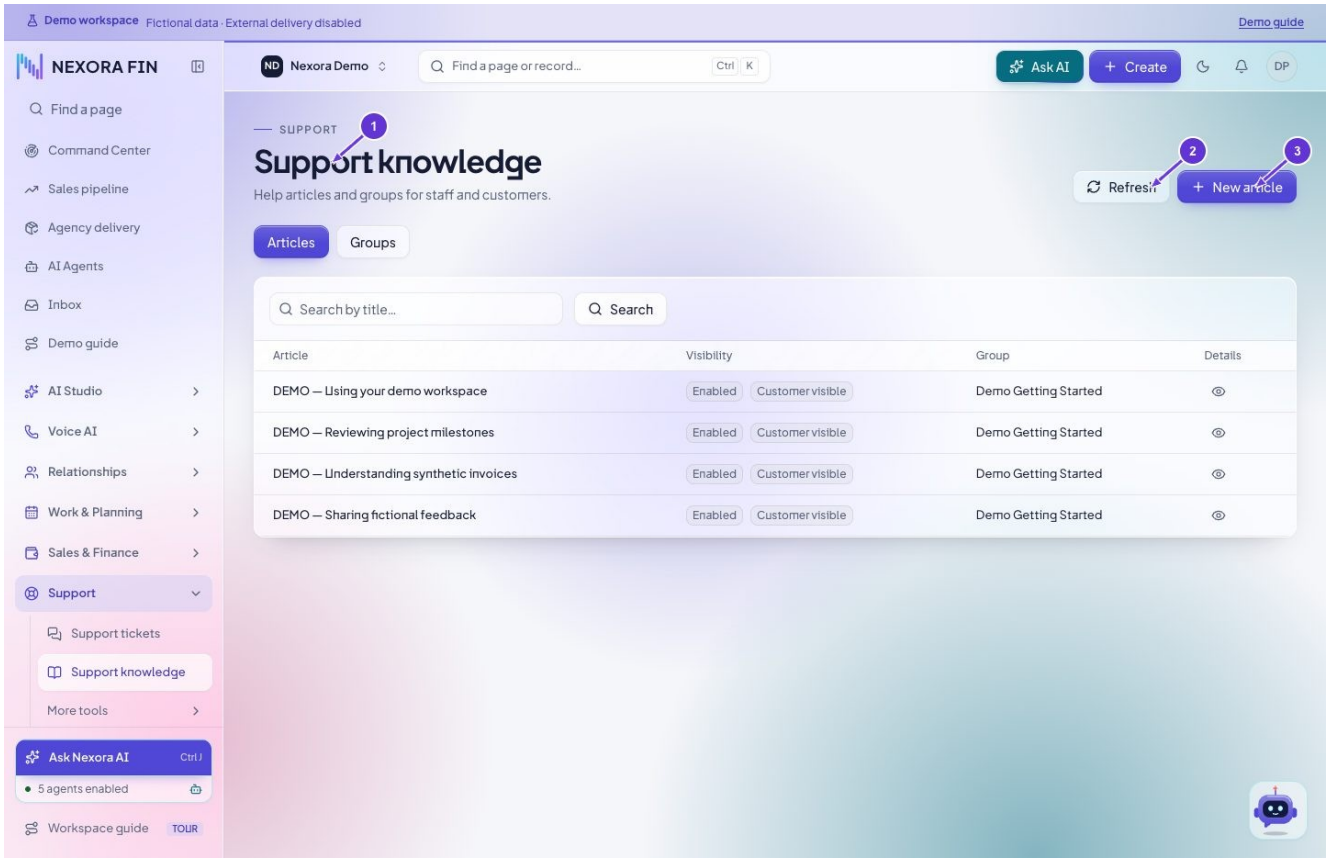


Figure 58 1 Support knowledge · 2 Refresh · 3 New article

Open in Nexora CRM

Incoming support email log

Find the incoming email by subject or time and inspect the processing outcome. Compare it with the ticket and department inbox configuration.

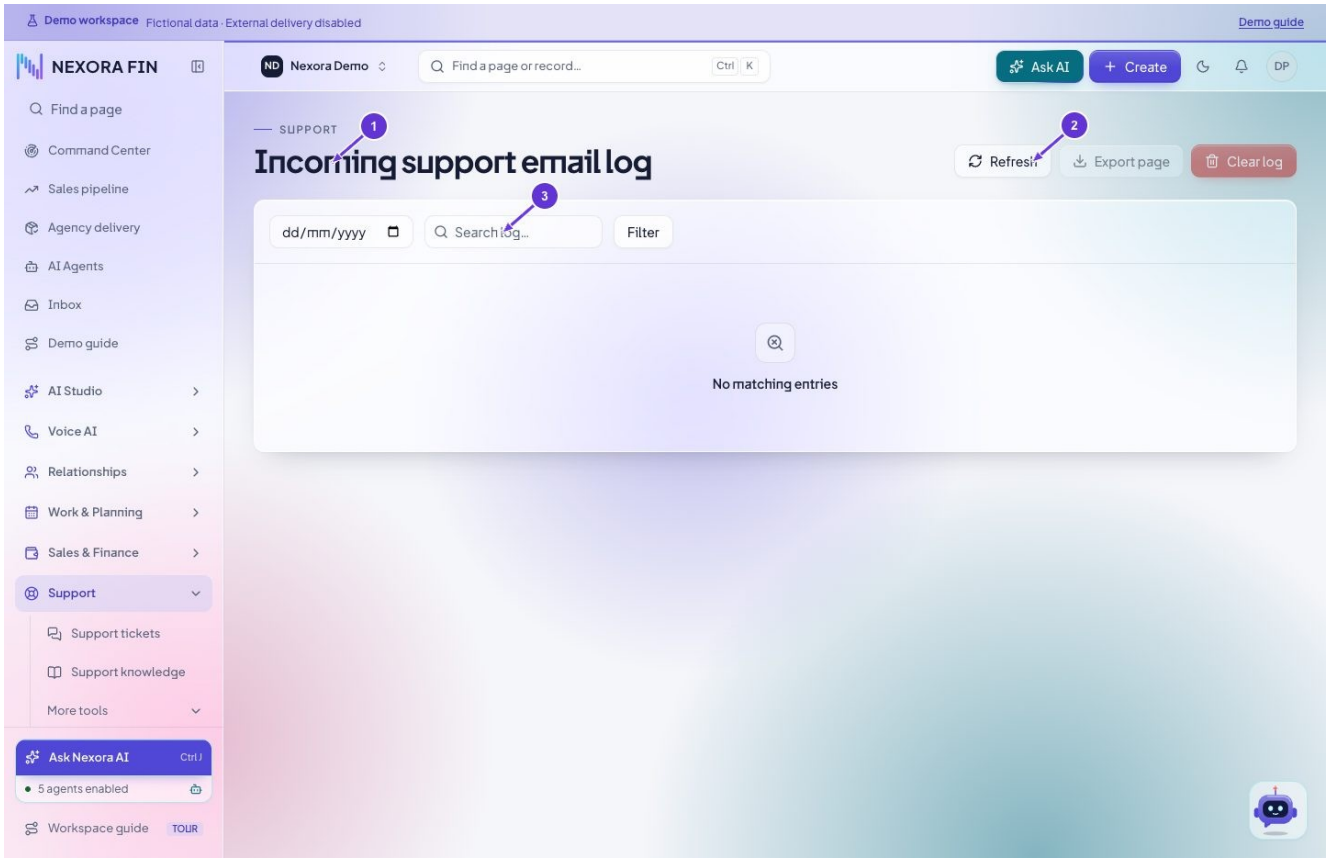


Figure 59 1 Incoming support email log · 2 Refresh · 3 Search log

Open in Nexora CRM

Predefined ticket replies

Review or create a reusable reply and save it. Open a ticket and verify the template appears in the reply controls before sending anything.

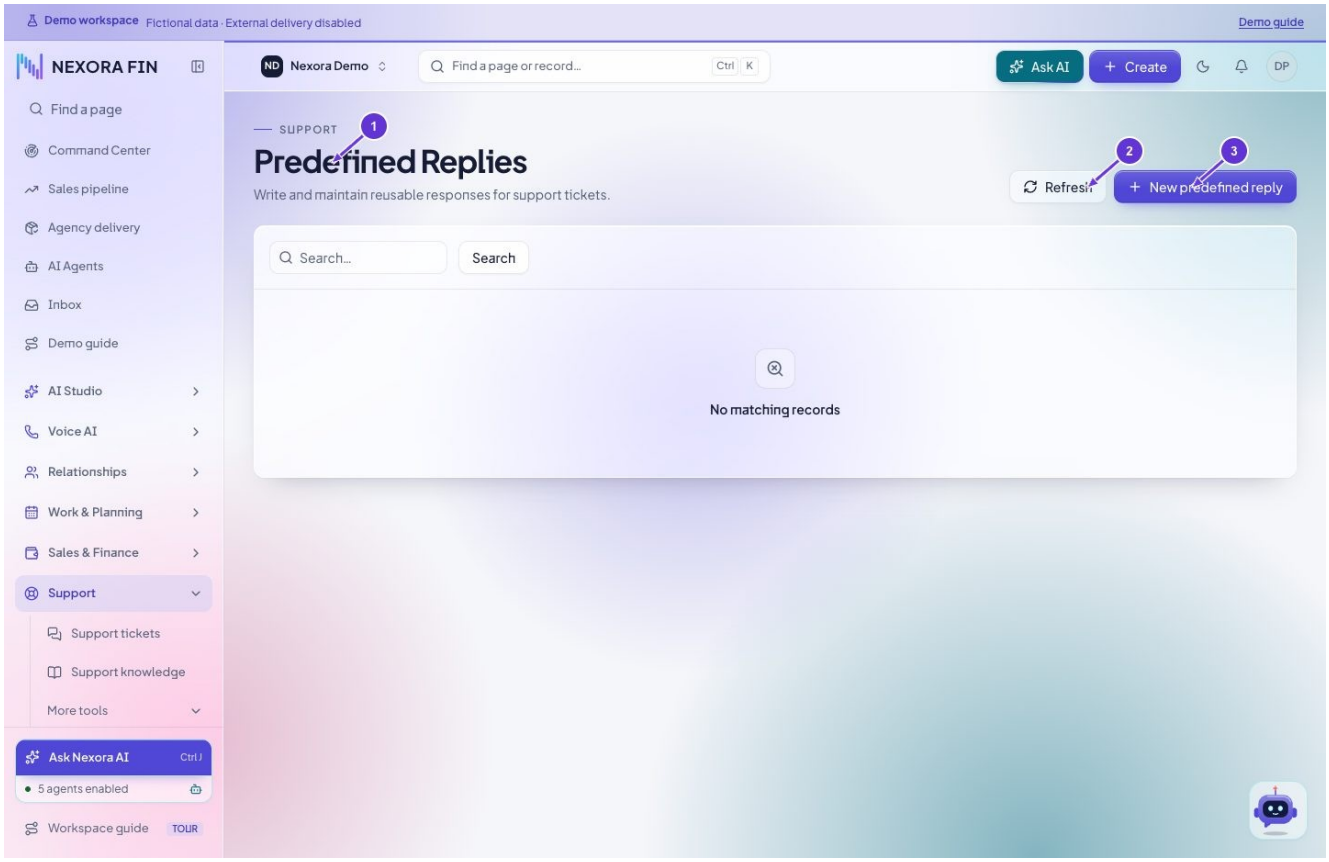


Figure 60 1 Predefined Replies · 2 Refresh · 3 New predefined reply

Open in Nexora CRM

Ticket statuses

Create or edit the status and ordering, save and verify it appears on the ticket. Check existing tickets before removing a status.

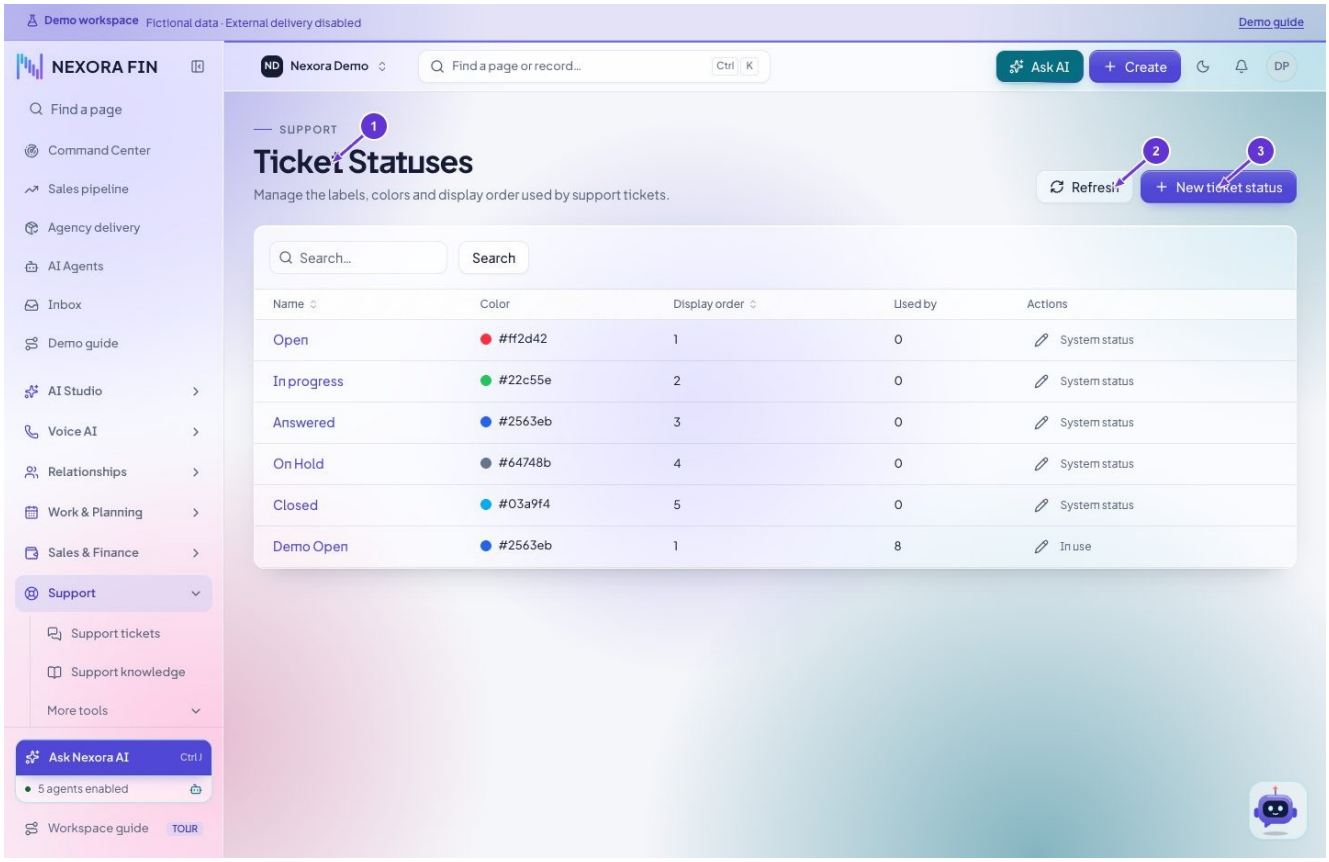


Figure 61 1 Ticket Statuses · 2 Refresh · 3 New ticket status

Open in Nexora CRM

Ticket spam filters

Review the existing rules, choose the correct match target and save the rule. Check incoming support email results to confirm the rule behaves as intended.

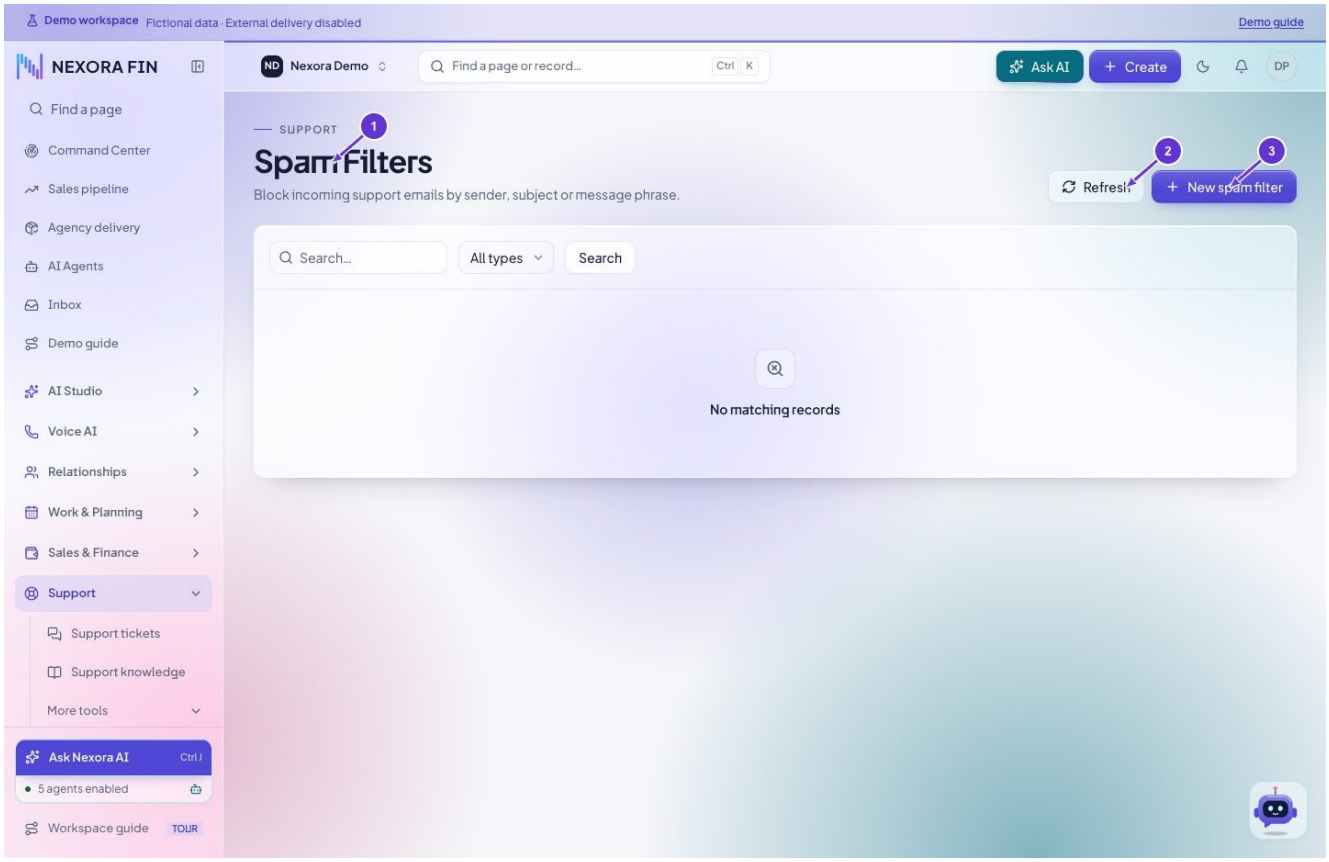


Figure 62 1 Spam Filters · 2 Refresh · 3 New spam filter

Open in Nexora CRM

Create and resolve a support ticket

Choose the new ticket action, select the contact or customer and department, and enter the subject, message and priority. Use the ticket thread to reply or add an internal note where offered. Check the recipient and visibility. When resolved, update status and verify the last action in the thread.

Open in Nexora CRM

08 Reports and analytics

All reports

Open Reports → All reports. Choose a report, set the date range and relevant filters, and run it. Use the export formats offered by that report. For a schedule, save the report filter, configure its recurrence and recipients, then check delivery history. Scheduling requires configured SMTP.

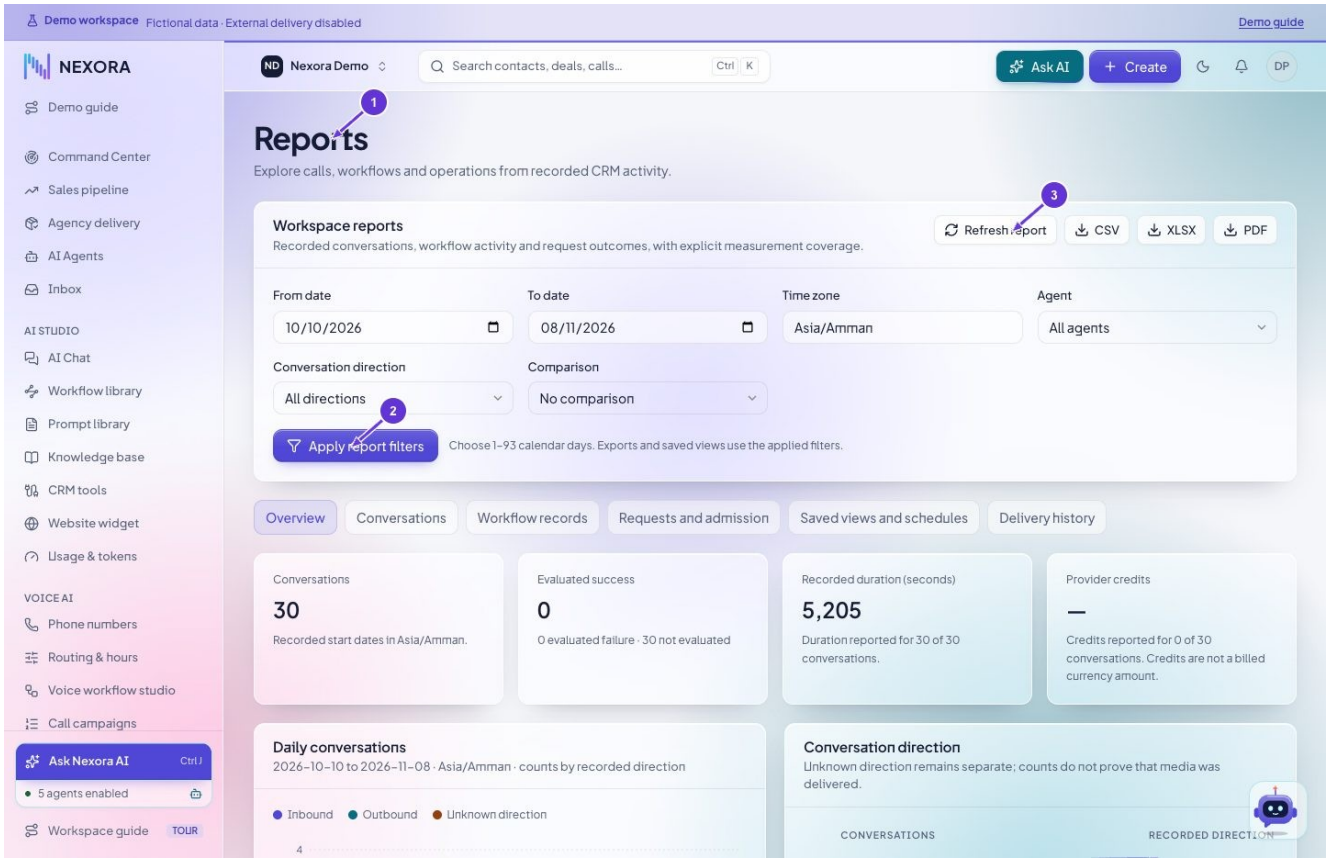


Figure 63 1 Reports · 2 Apply report filters · 3 Refresh report

Open in Nexora CRM

Provider usage

Open AI Studio → Provider usage. Select the date range, review available provider totals and compare them against the provider account for the same interval.

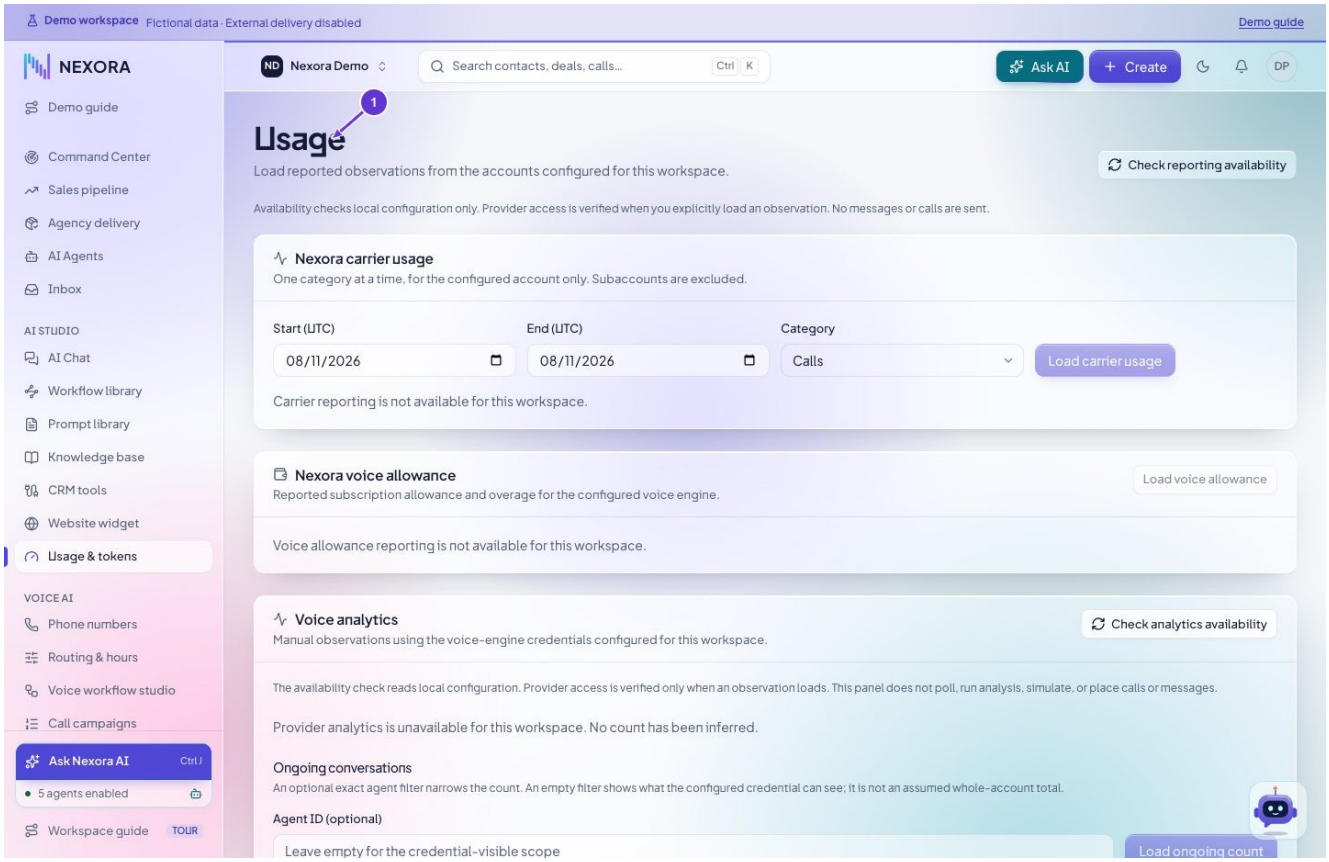


Figure 64 1 Usage

Open in Nexora CRM

Carrier usage

Select a date range and filter by the available number or direction. Compare the recorded usage with carrier billing for the same period.

Open in Nexora CRM

Campaign quality

Select the campaign and period, then review outcome distribution, failed calls and follow-ups. Open the individual call before attributing a cause.

Open in Nexora CRM

Bulk PDF exporter

Choose the document type and filters, check the records included, and start the export. Open the downloaded archive or PDF to verify the selected scope.

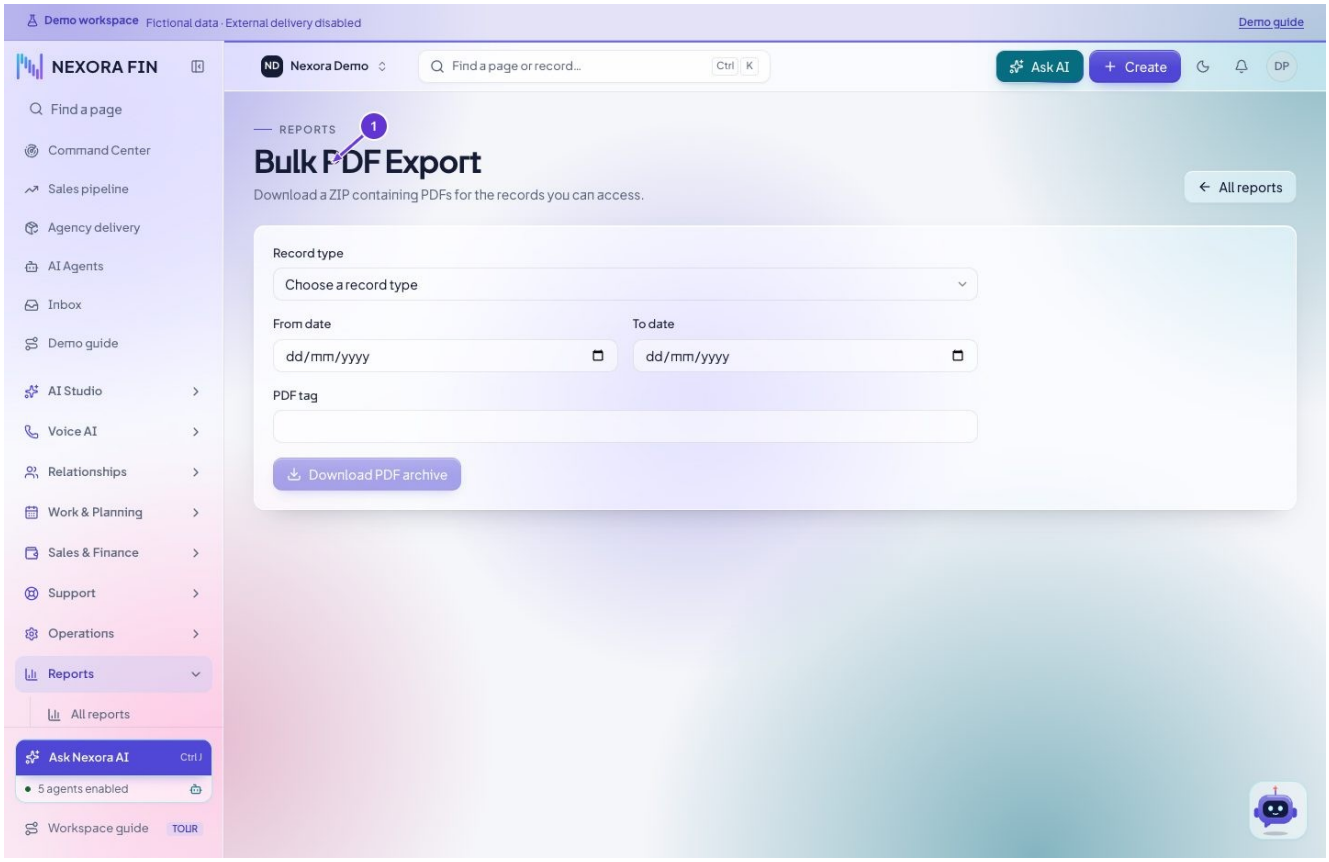


Figure 65 1 Bulk PDF Export

Open in Nexora CRM

Sales reports

Choose the report and set a date range and any available customer or status filters. Compare totals with the underlying invoices or payments before exporting.

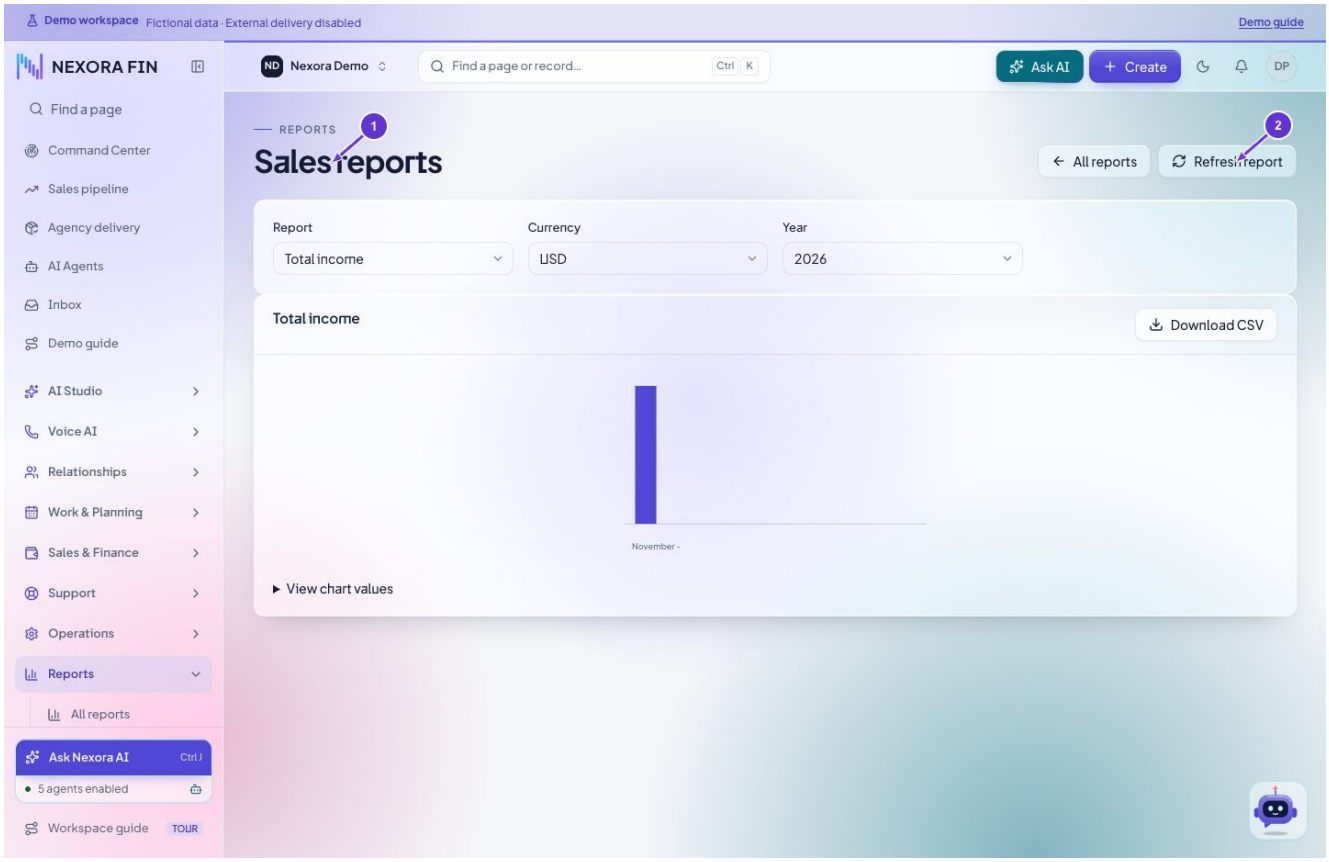


Figure 66 1 Sales reports · 2 Refresh report

Open in Nexora CRM

Expense reports

Set the period and category or customer filters. Verify totals against expense records and export the filtered result where available.

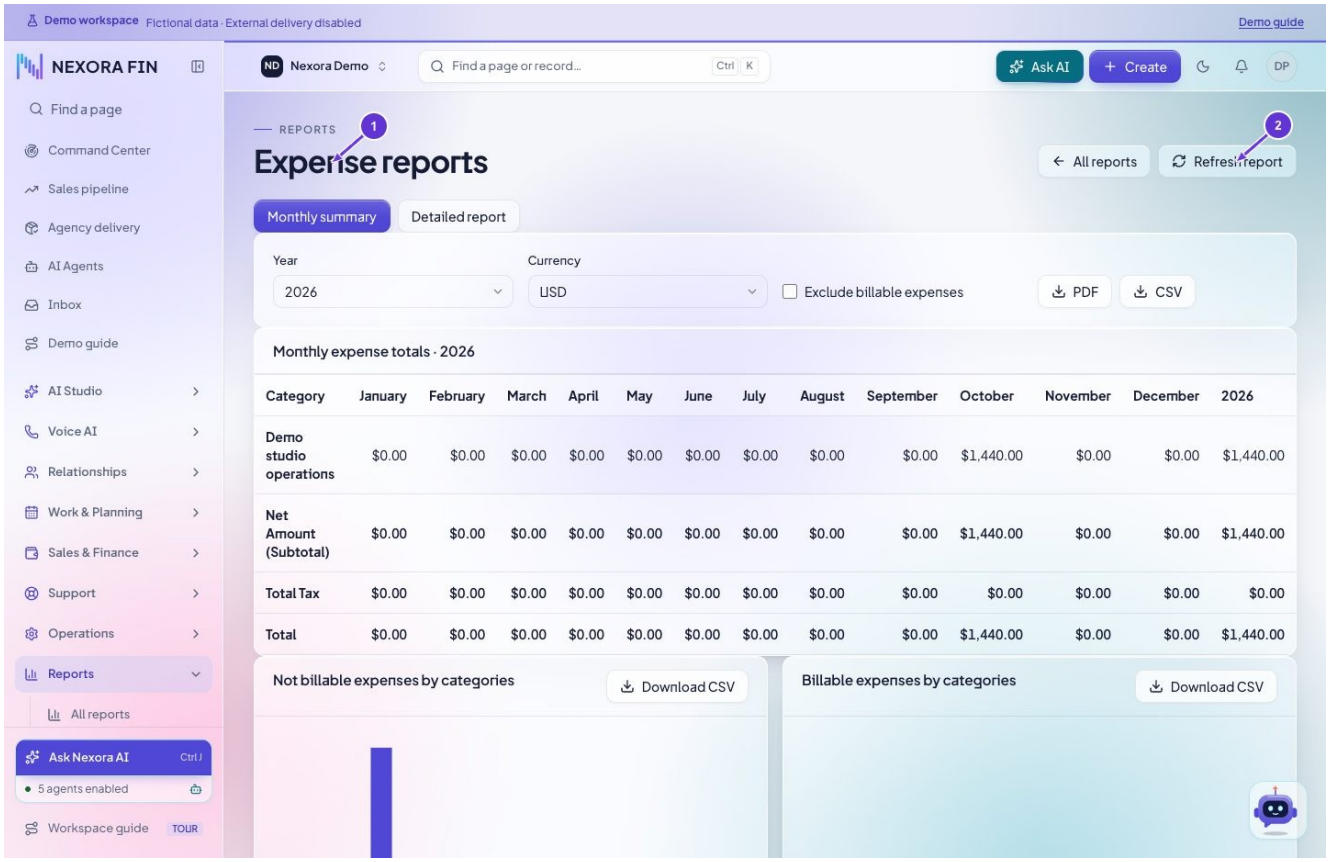


Figure 67 1 Expense reports · 2 Refresh report

Open in Nexora CRM

Income vs Expenses

Choose the report year and compare the income and expense series. Inspect the underlying records if a monthly total differs from expectations.

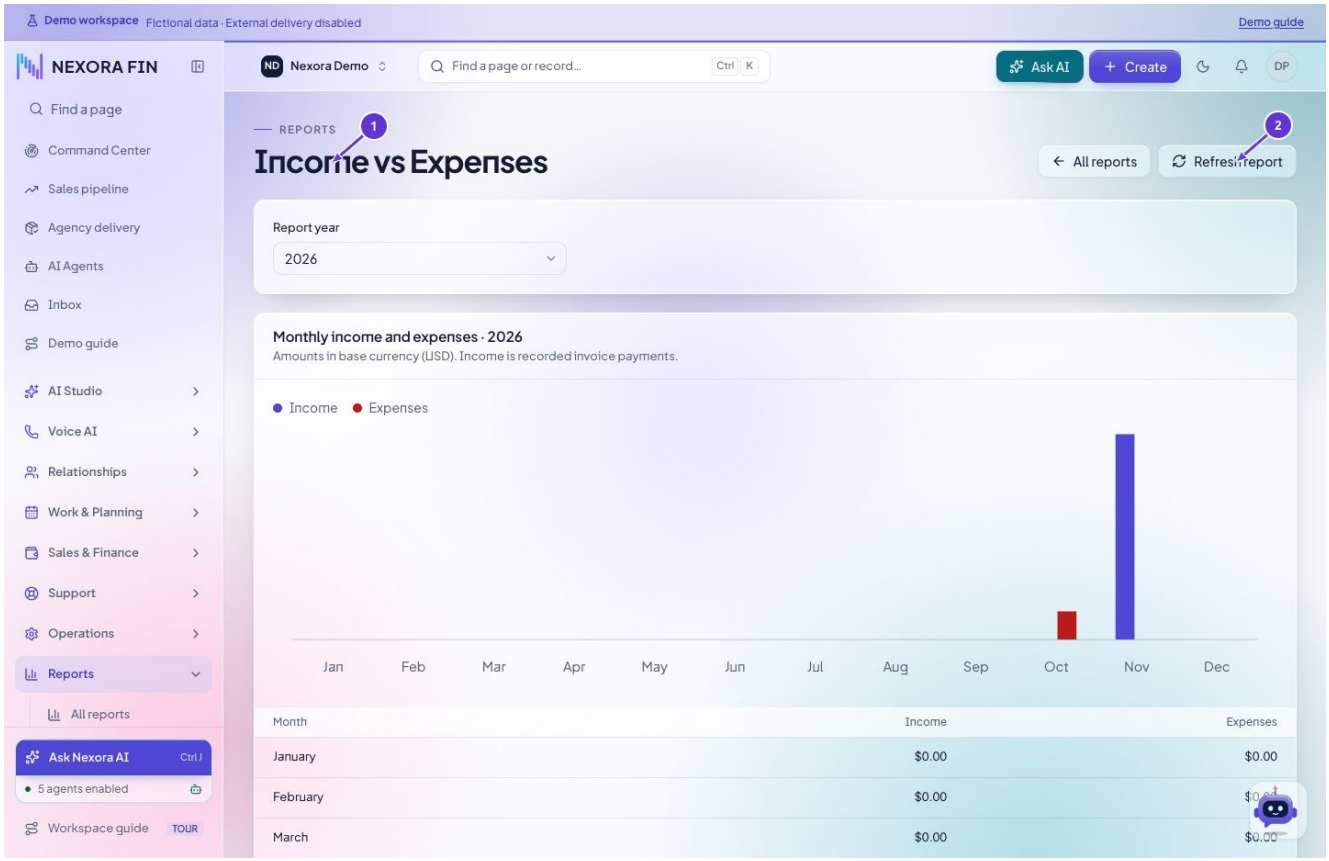


Figure 68 1 Income vs Expenses · 2 Refresh report

Open in Nexora CRM

Leads reports

Select the lead report filters, compare source and status counts, and verify the underlying lead records before downloading the report.

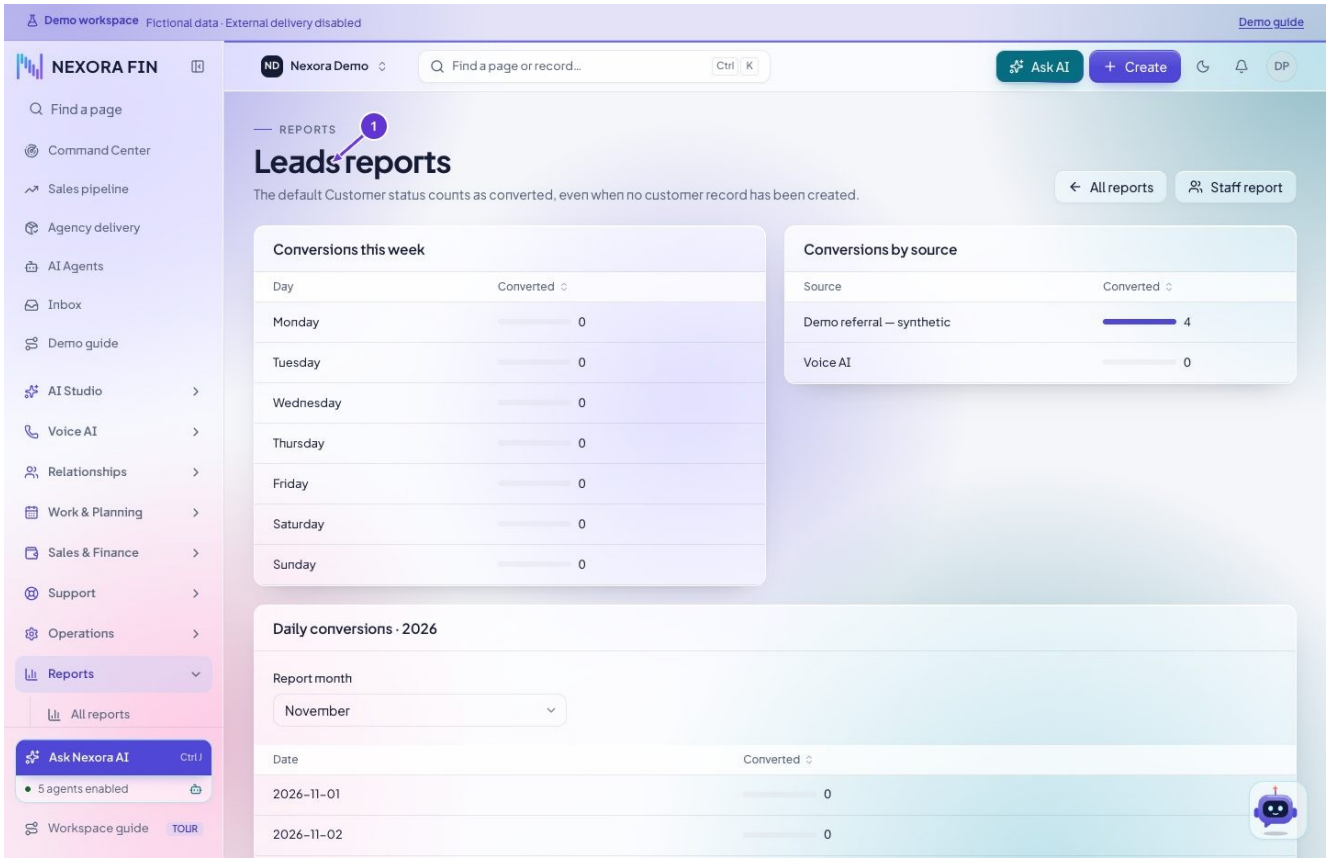


Figure 69 1 Leads reports

Open in Nexora CRM

Knowledge base feedback

Choose the available article or period filter. Review votes and feedback alongside the published article.

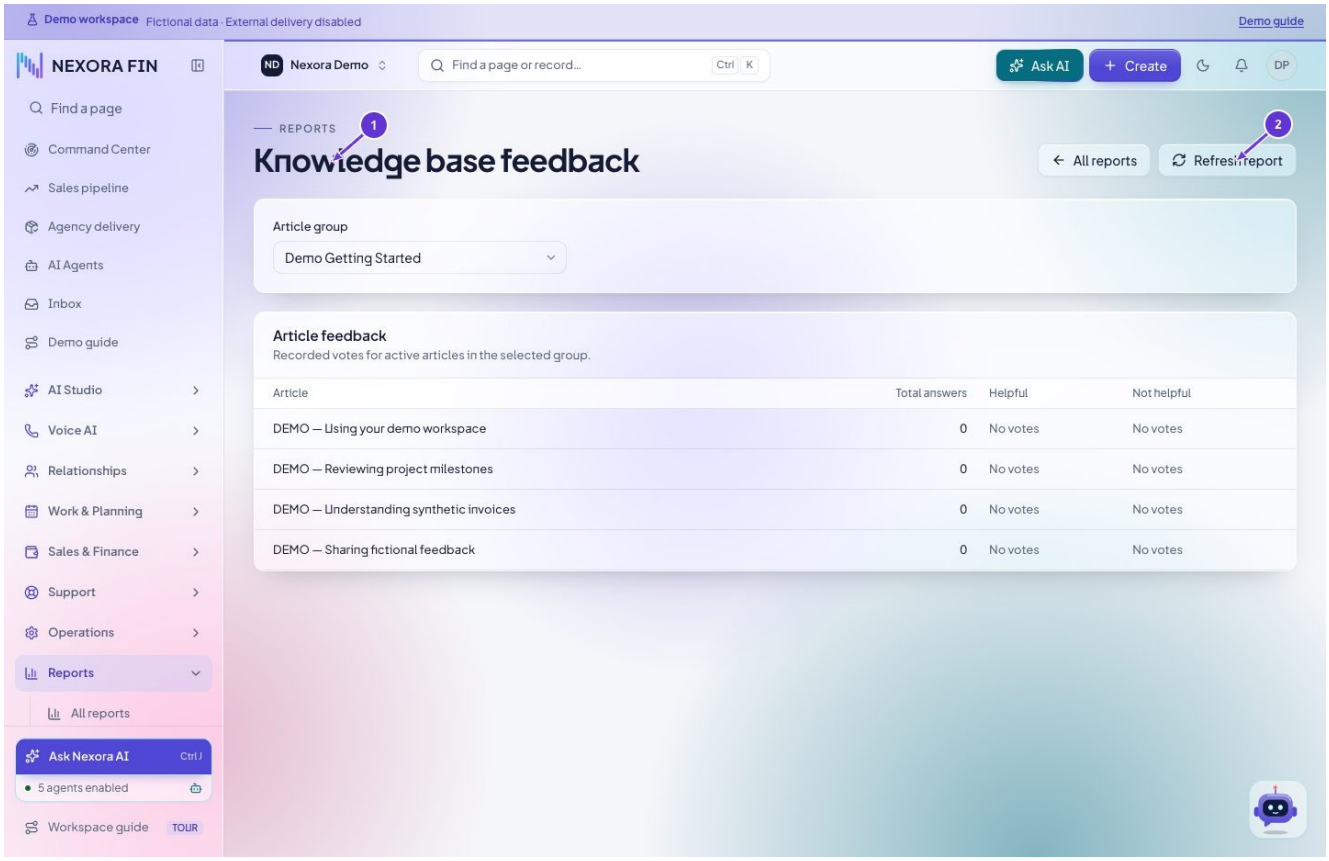


Figure 70 1 Knowledge base feedback · 2 Refresh report

Open in Nexora CRM

Timesheets

Set the staff member and time range, then review recorded time and the linked tasks before using the report.

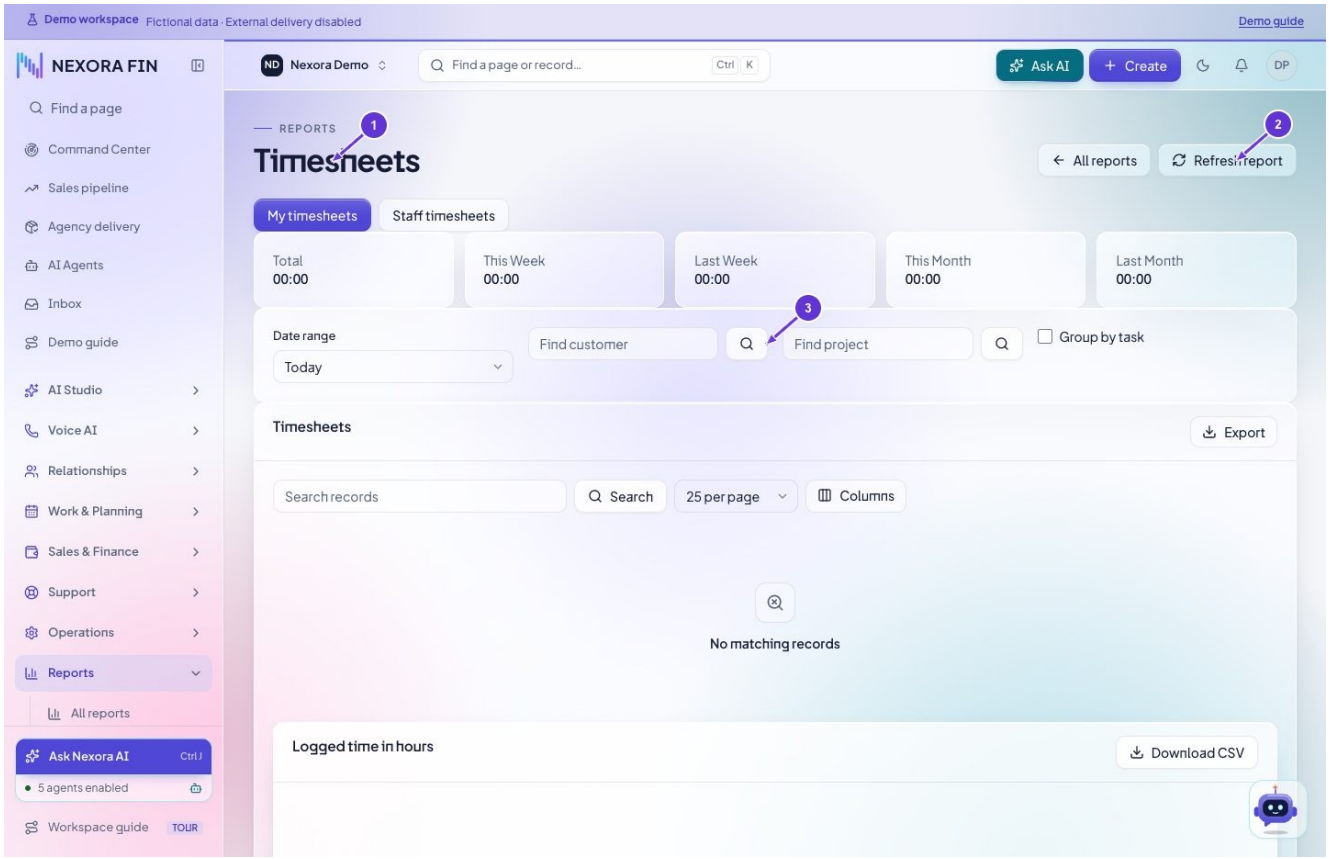


Figure 71 1 Timesheets · 2 Refresh report · 3 Search customer

Open in Nexora CRM

Scheduled reports

Create a schedule from a saved report, set its cadence and recipient, save and check delivery history. Confirm SMTP is configured before expecting delivery.

Open in Nexora CRM

Voice and Workflows reports

Select the voice or workflow report, set a date range and any agent or event filter, and verify the source records before export.

Open in Nexora CRM

CSV export

Open Settings → Import & export. Select the available dataset, review its filters and export only the scope you need.

Open in Nexora CRM

09 Workspace and administration

Import and export

Open Settings → Import & export. Download or review the lead template, map the supported columns and check a small CSV before importing the full list. Confirm the import result, then find the imported rows in Leads.

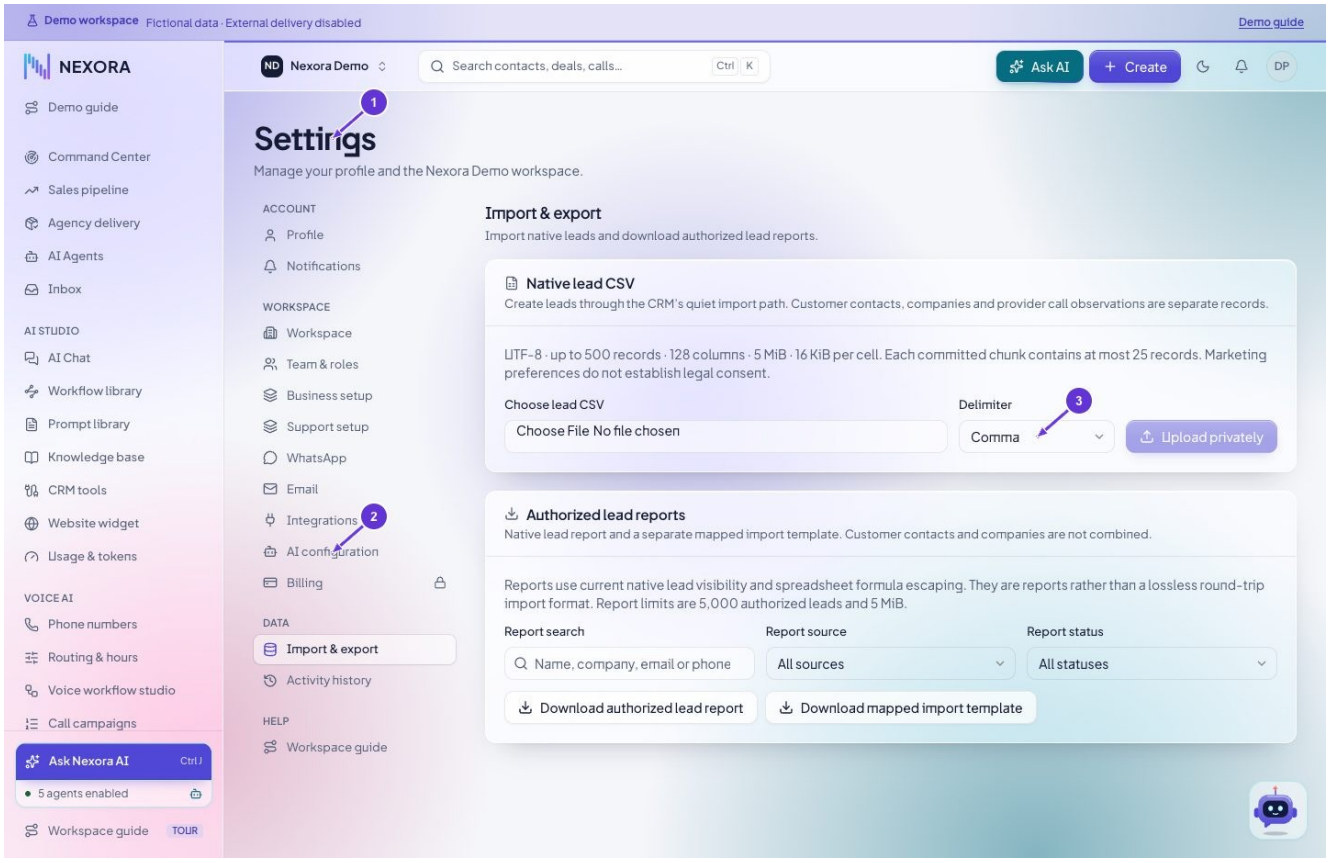


Figure 72 1 Settings · 2 AI configuration · 3 Comma Semicolon Tab

Open in Nexora CRM

WhatsApp settings

Open Settings → WhatsApp and select the intended Meta or Twilio connection. Verify the sender identity and callbacks. Check recipient consent and use an approved template when required. Verify final delivery in provider/message history. Add keys only in the credential fields in Settings.

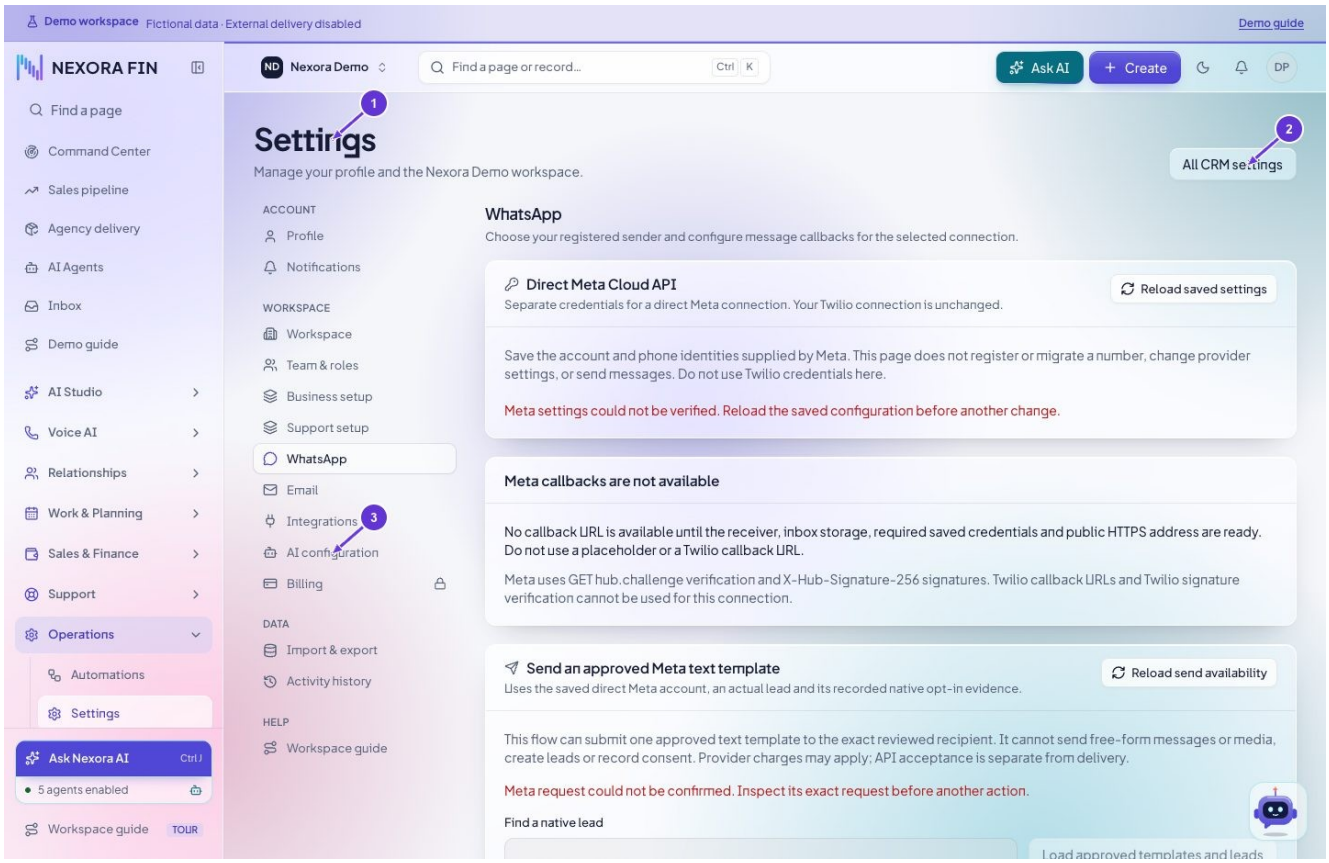


Figure 73 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Email settings

Open Settings → Email and choose the supported transport. Enter the sender, SMTP host, port, encryption and account fields from your provider. Save and verify a controlled email in the recipient inbox. Keep passwords out of Chat.

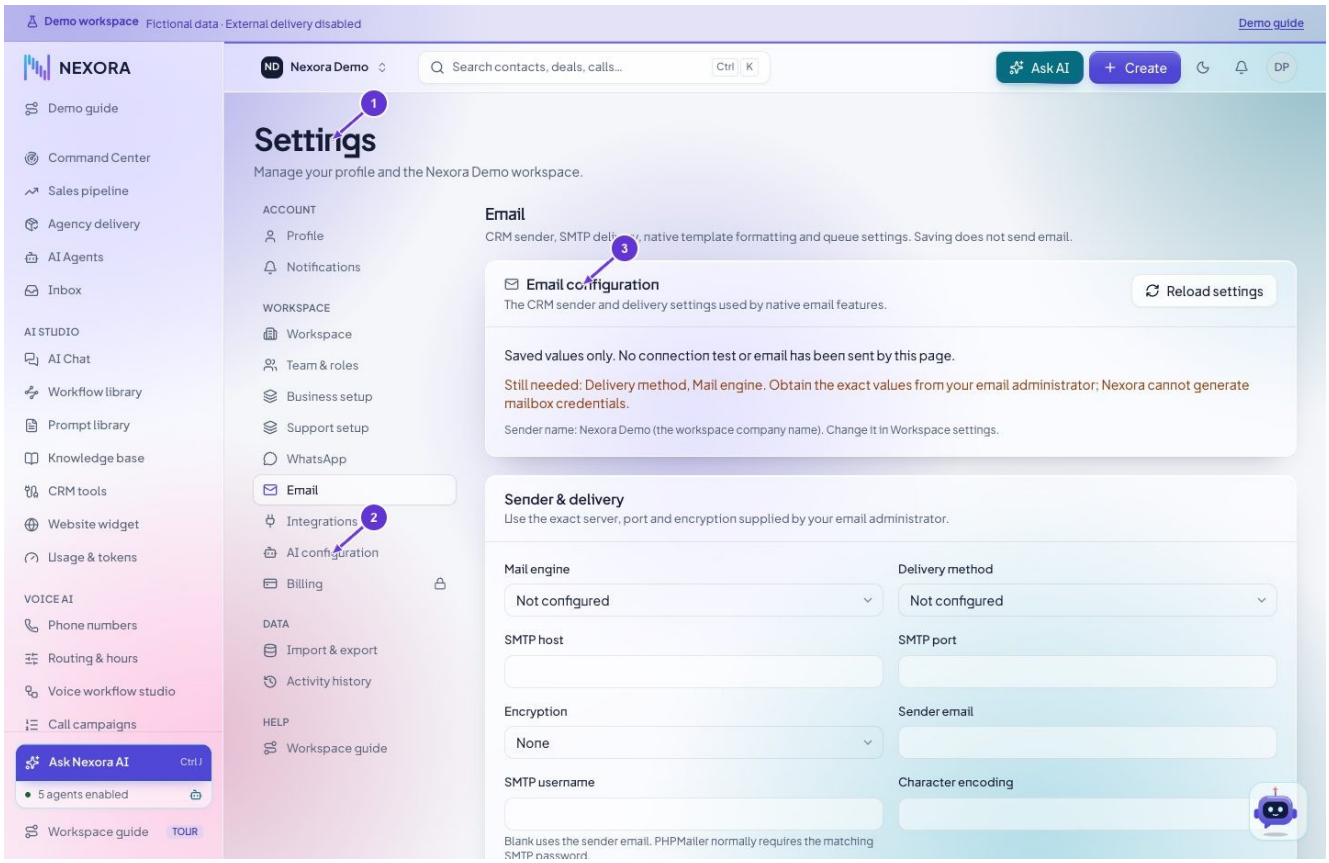


Figure 74 1 Settings · 2 AI configuration · 3 Email configuration

Open in Nexora CRM

Integration settings

Open Settings → Integrations. Select the provider, enter credentials in the designated fields, save and use the available connection check. Verify the exact intended feature separately, because reading a provider account does not verify a send or callback.

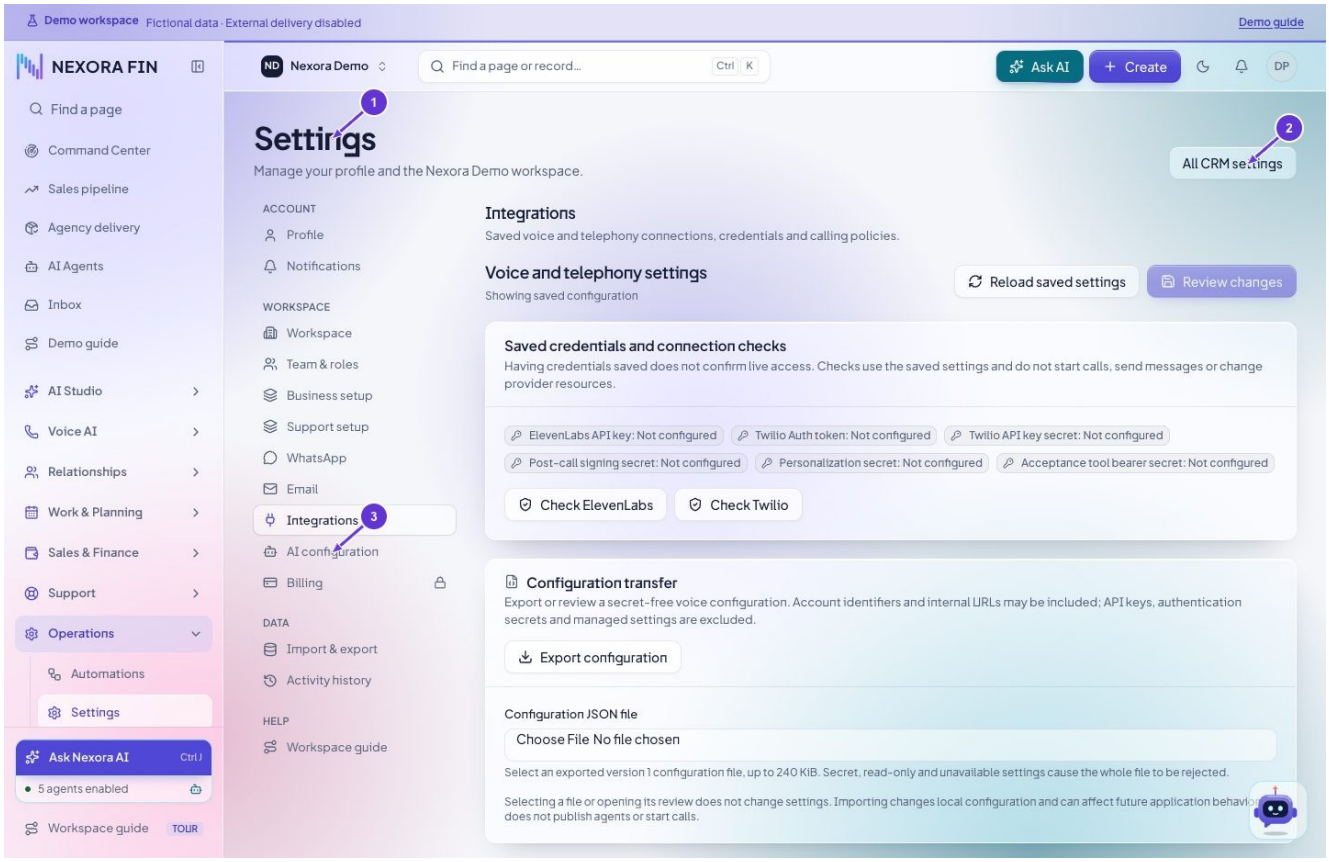


Figure 75 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

My profile

Open Settings → Profile and edit your permitted identity or display preferences. Save and reopen Profile to confirm.

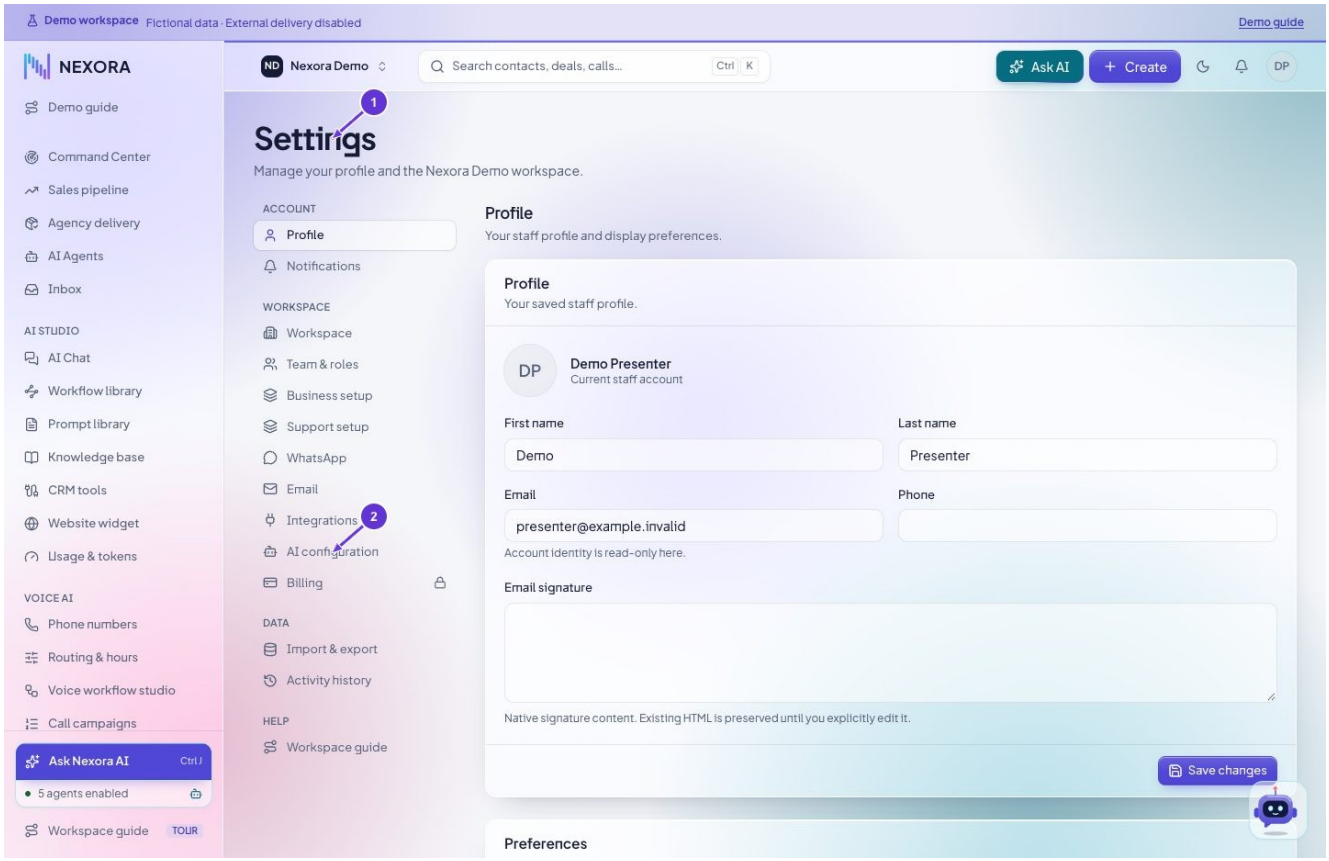


Figure 76 1 Settings · 2 AI configuration

Open in Nexora CRM

Notification preferences

Open Settings → Notifications to view the notification center for your account. Use Reload inbox to refresh it. If an unread notification is available, select Mark read on that row or use Mark displayed notifications read. Delivery preferences for email, push and Slack are unavailable on this screen.

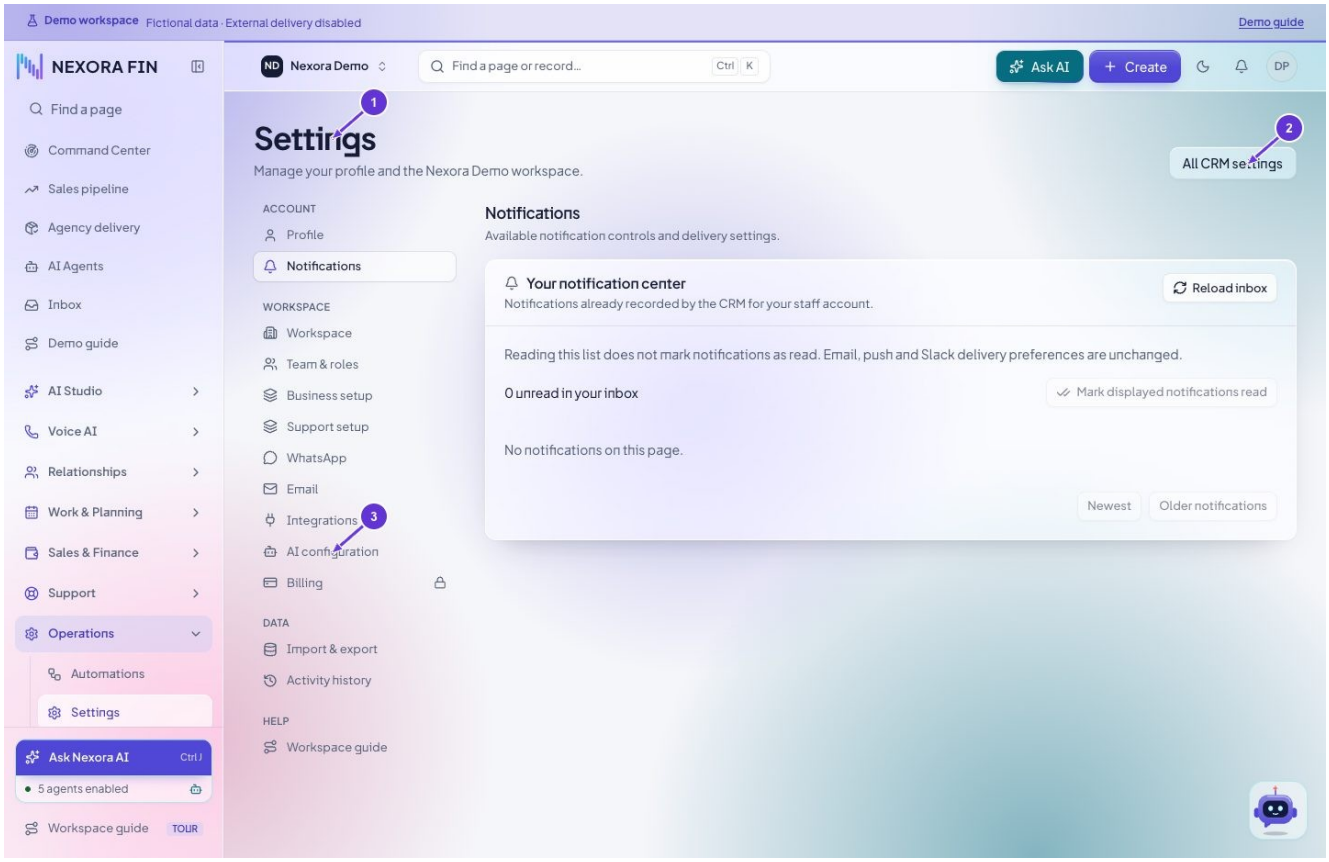


Figure 77 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Workspace preferences

Open Settings → Workspace. Review the company name, website, time zone, language and date and time formats. Base currency is read-only here. Use Save only if the form is editable for your account, then reopen Workspace to check the saved values.

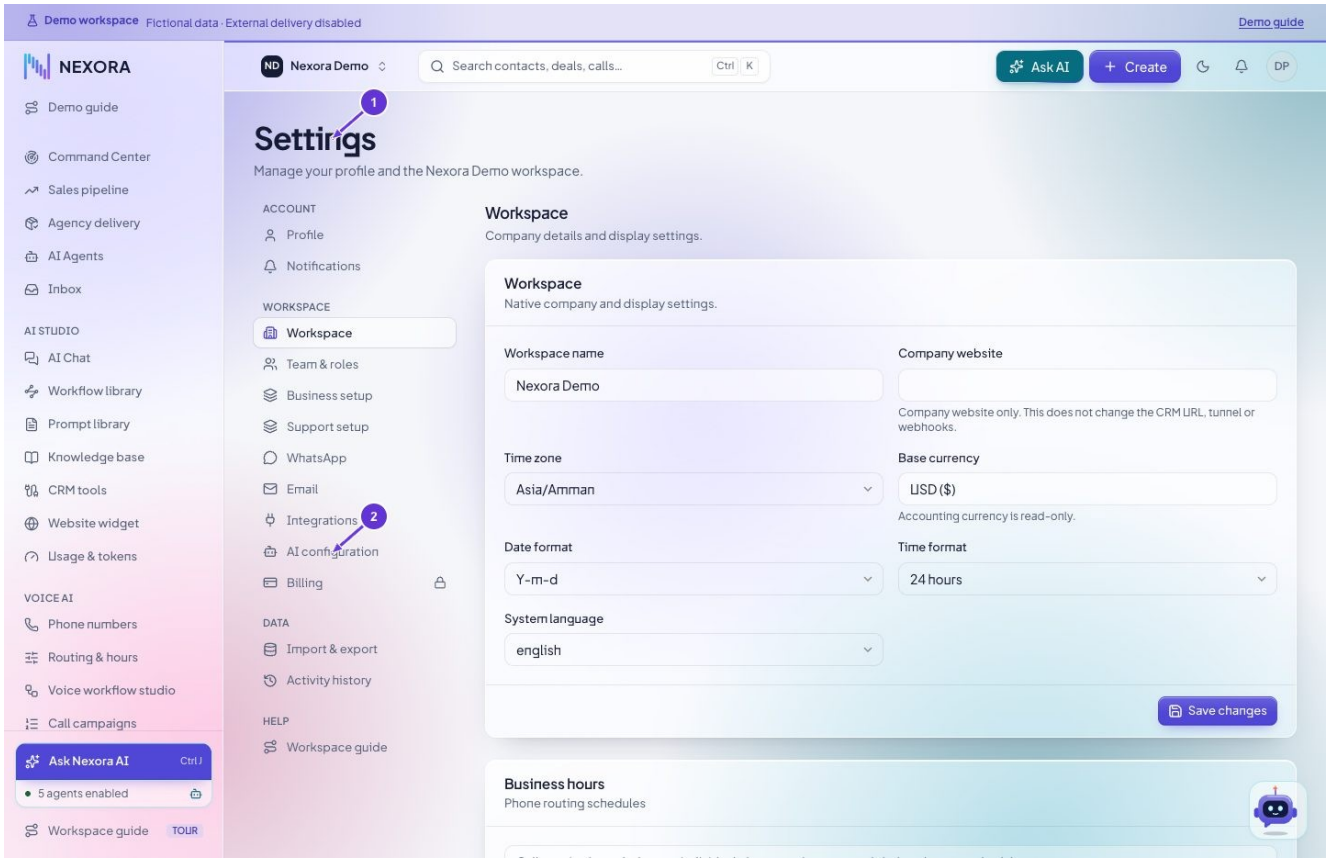


Figure 78 1 Settings · 2 AI configuration

Open in Nexora CRM

Team and roles

Open Settings → Team & roles. Choose the staff member or role, review permitted actions and save. Verify access using the intended role.

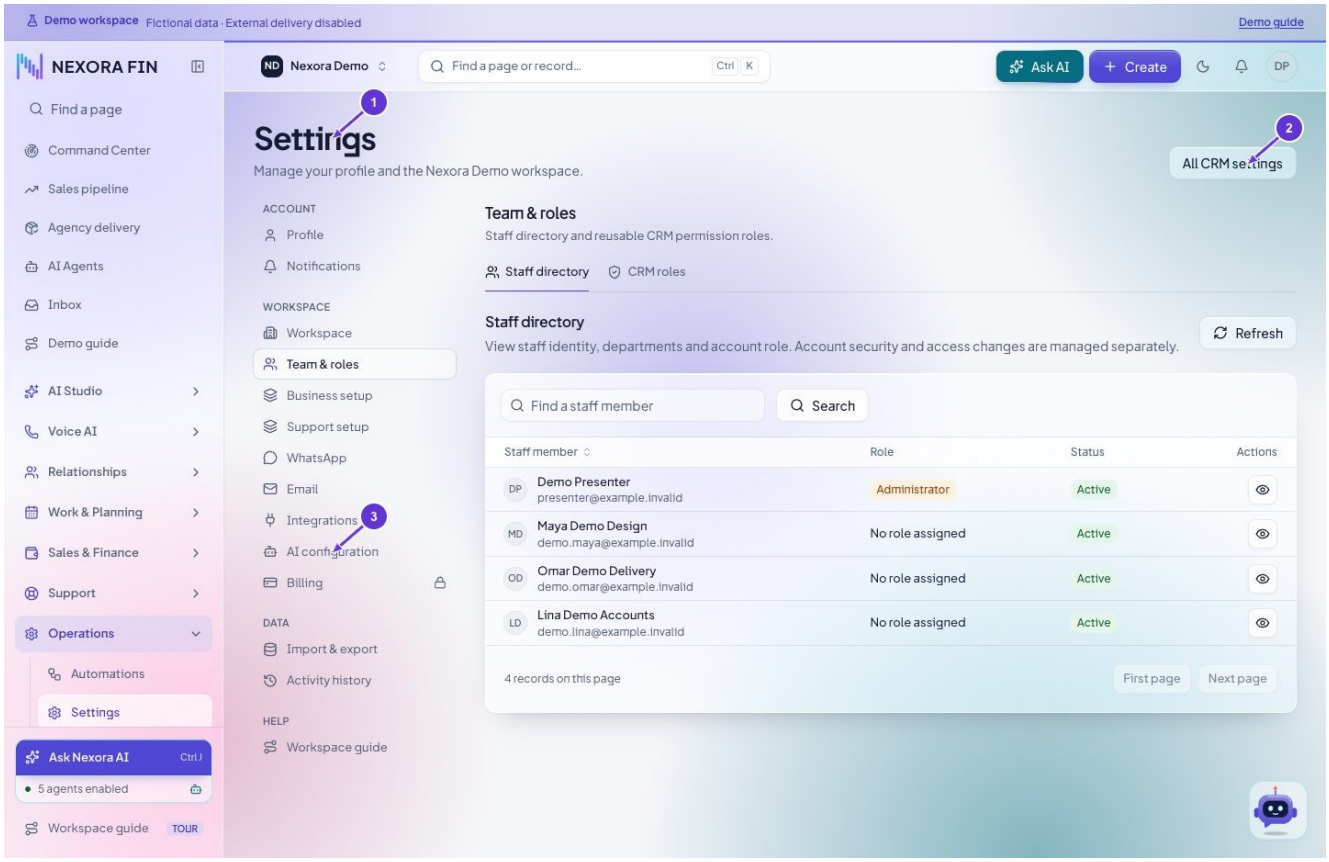


Figure 79 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Business setup

Open Settings → Business setup. Choose the relevant catalog or the Taxes or Currencies tab. Save and verify the new value is selectable on the corresponding record.

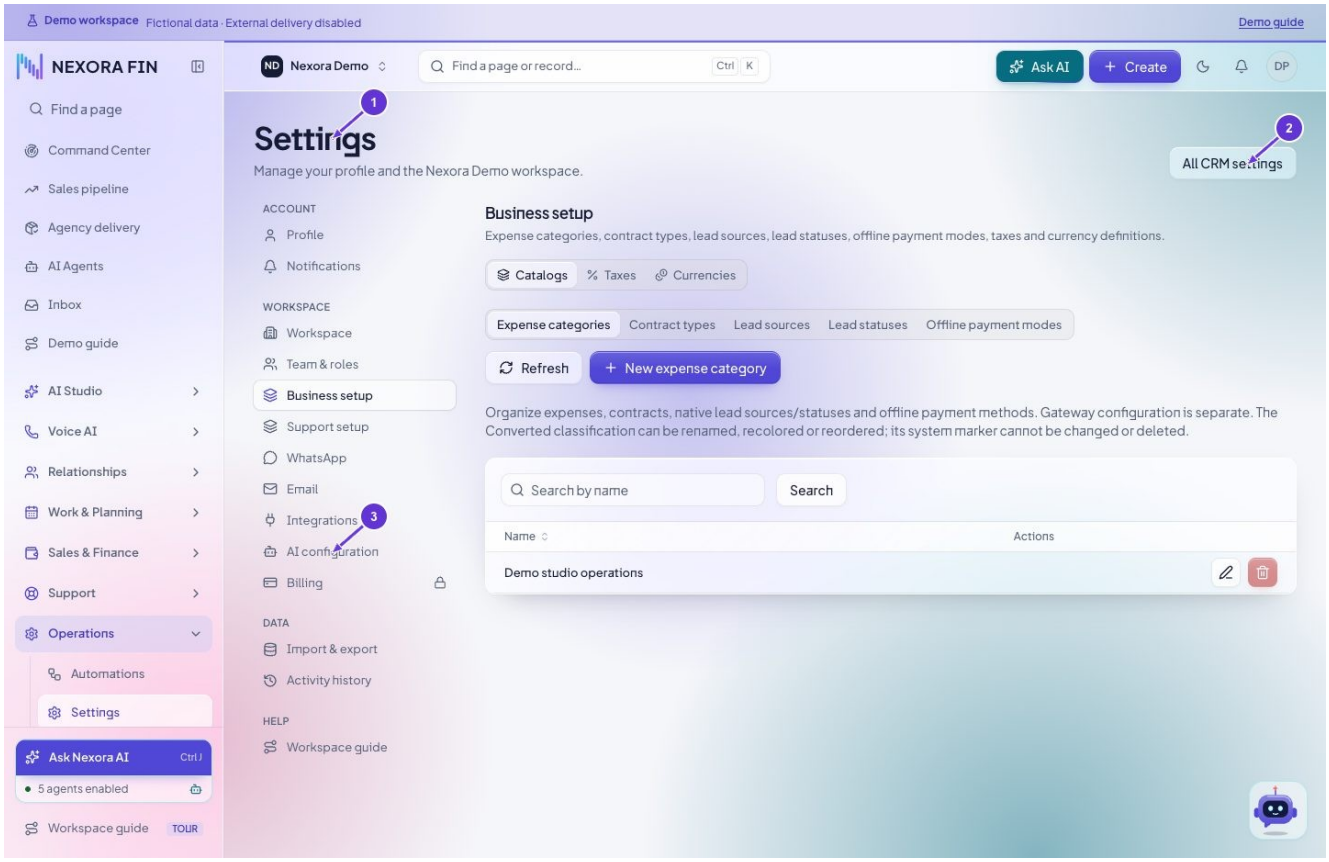


Figure 80 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Support setup

Open Settings → Support setup. Choose Departments, Priorities or Services, make the intended change and confirm it appears in the ticket form.

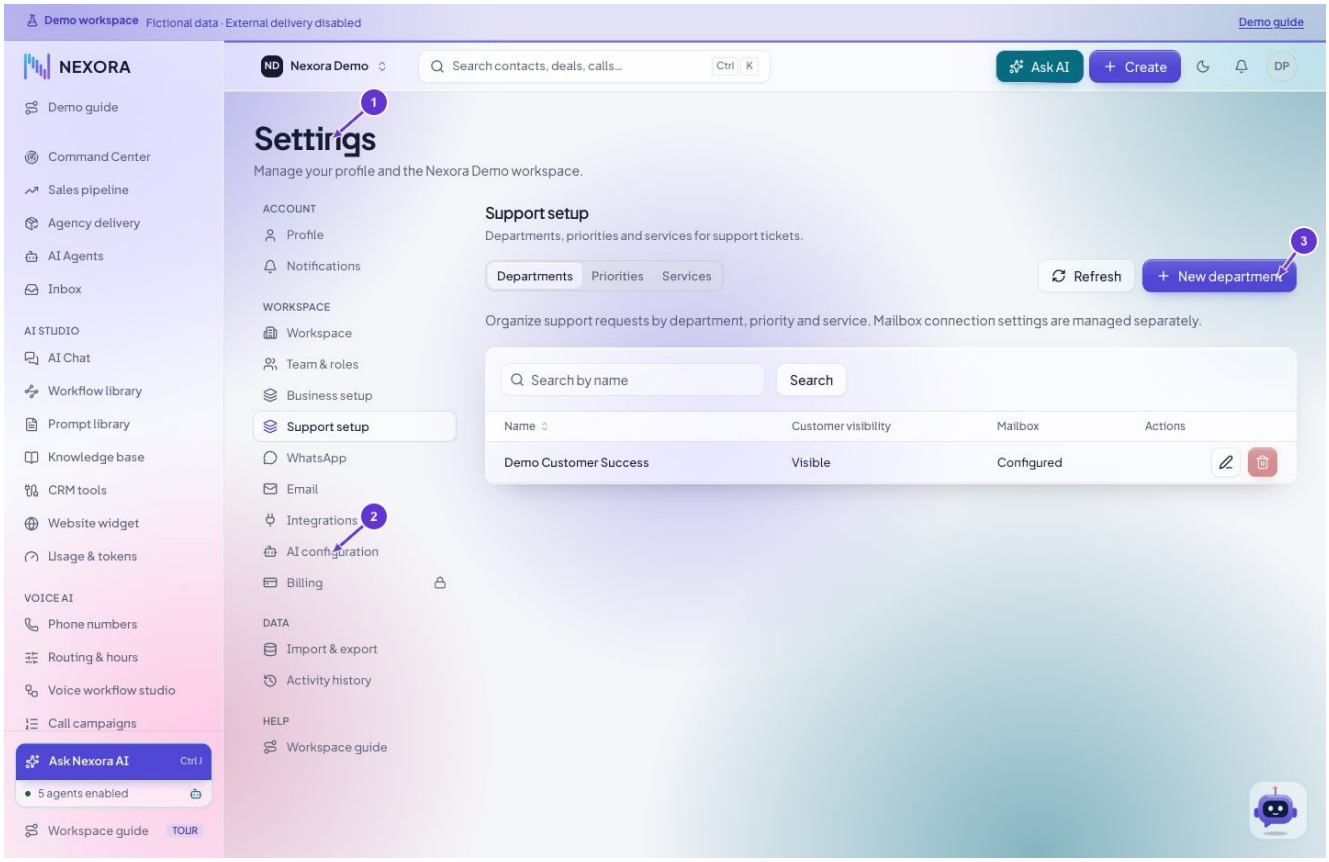


Figure 81 1 Settings · 2 AI configuration · 3 Refresh

Open in Nexora CRM

Workspace billing

Open Settings → Billing to check the workspace billing status. The live CRM does not expose a workspace subscription or payment form here. Customer invoices and customer subscriptions are separate records.

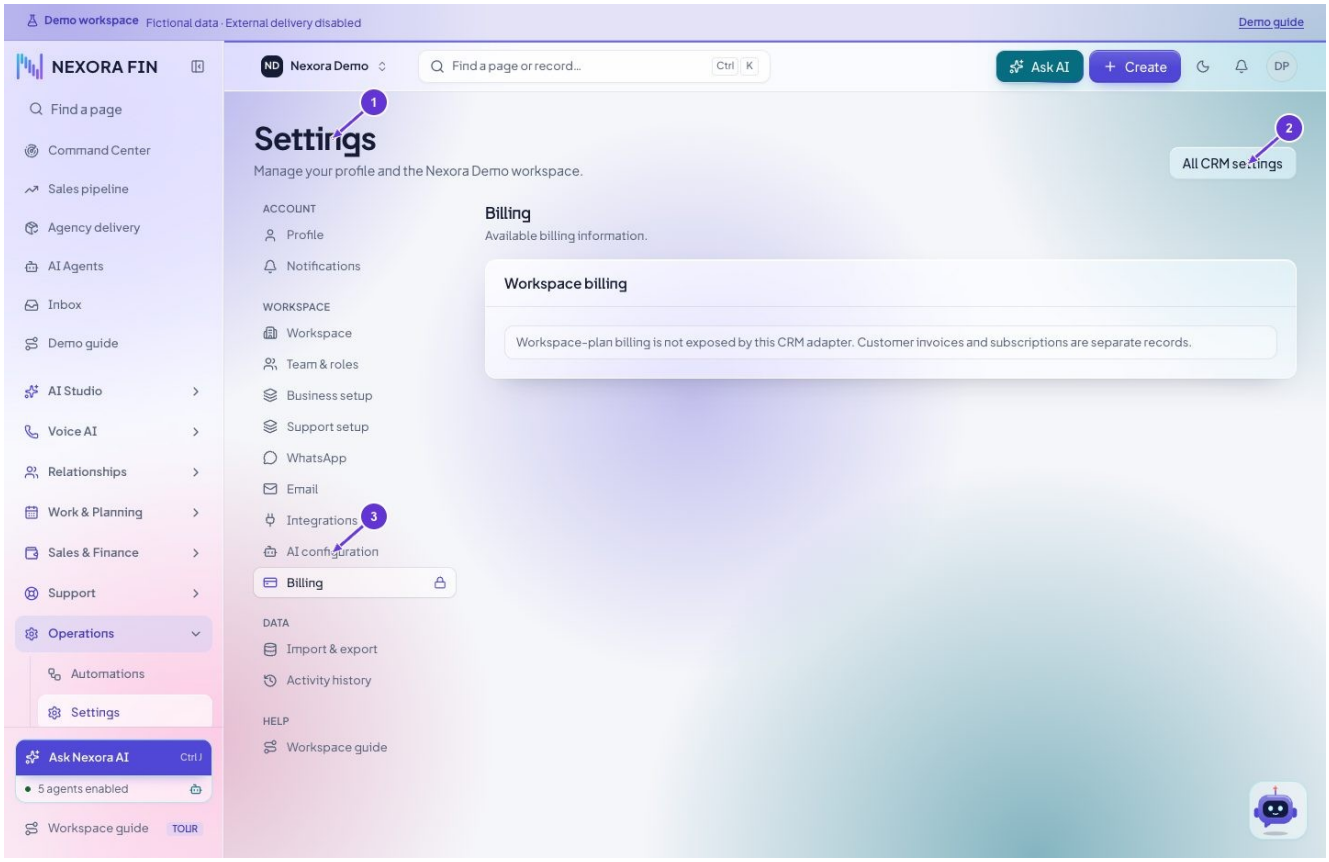


Figure 82 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Activity history

Open Settings → Activity history. Filter or locate the record, compare its timestamp and actor with the source record, and use the available audit details.

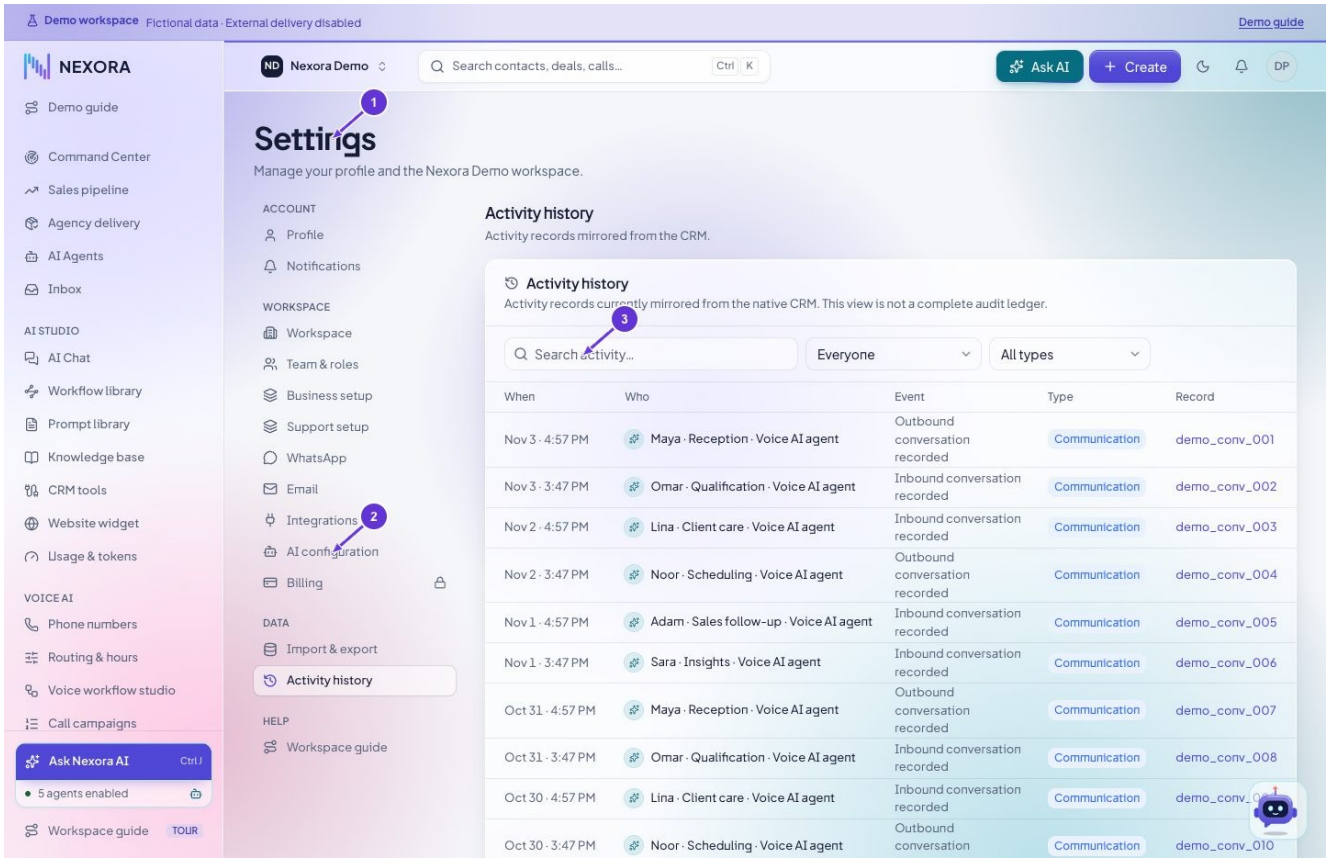


Figure 83 1 Settings · 2 AI configuration · 3 Search activity

Open in Nexora CRM

Taxes catalog

Open Taxes in Business setup. Review tax name and rate, save and confirm the tax is selectable on a draft sales document.

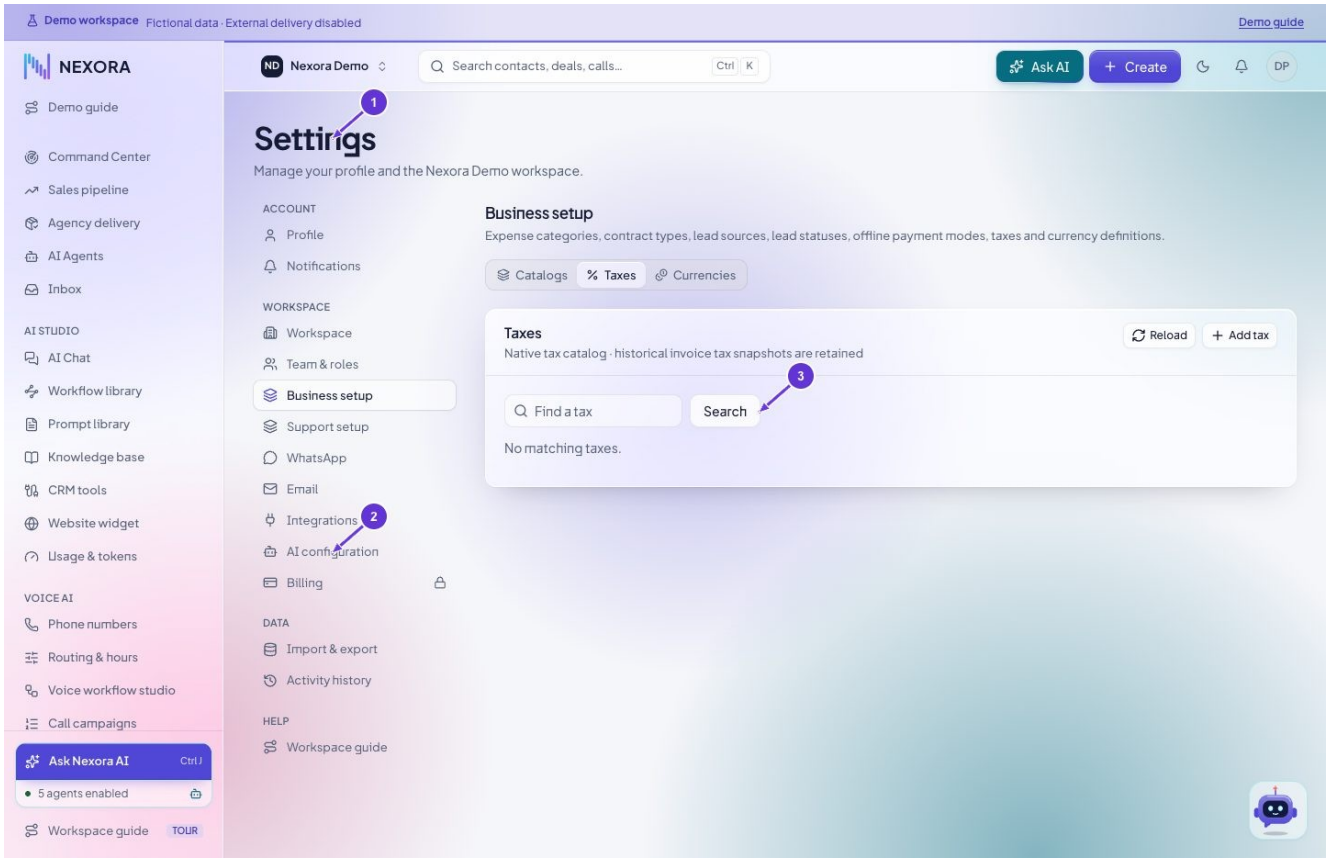


Figure 84 1 Settings · 2 AI configuration · 3 Search

Open in Nexora CRM

Currencies catalog

Open Currencies in Business setup. Review the code and display settings, save and confirm the currency appears in the relevant sales or expense form.

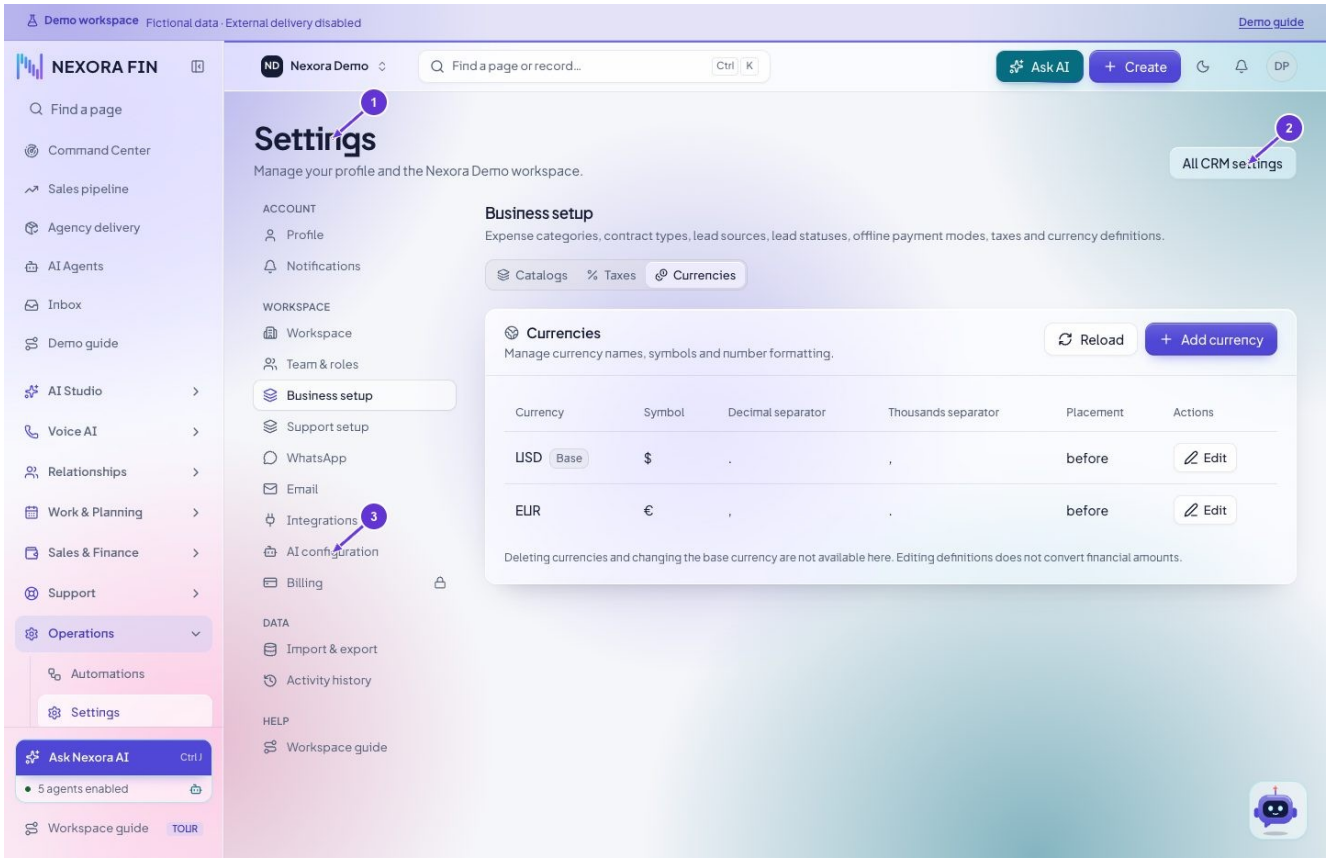


Figure 85 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Support departments

Open Support setup → Departments. Review the name and staff assignments, save and verify the department in the ticket form.

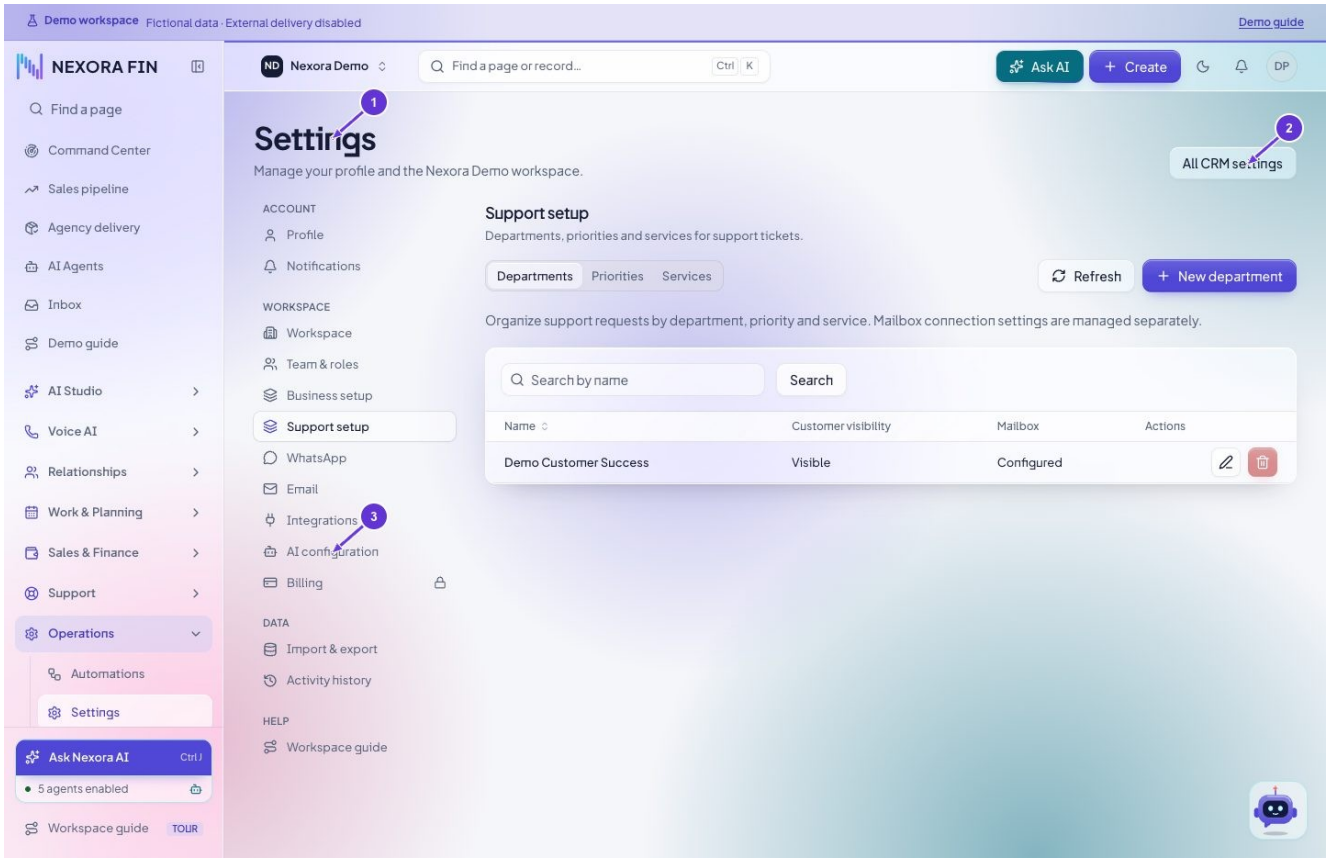


Figure 86 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Support priorities

Open Support setup → Priorities. Review labels and order, save and verify the priorities available on a ticket.

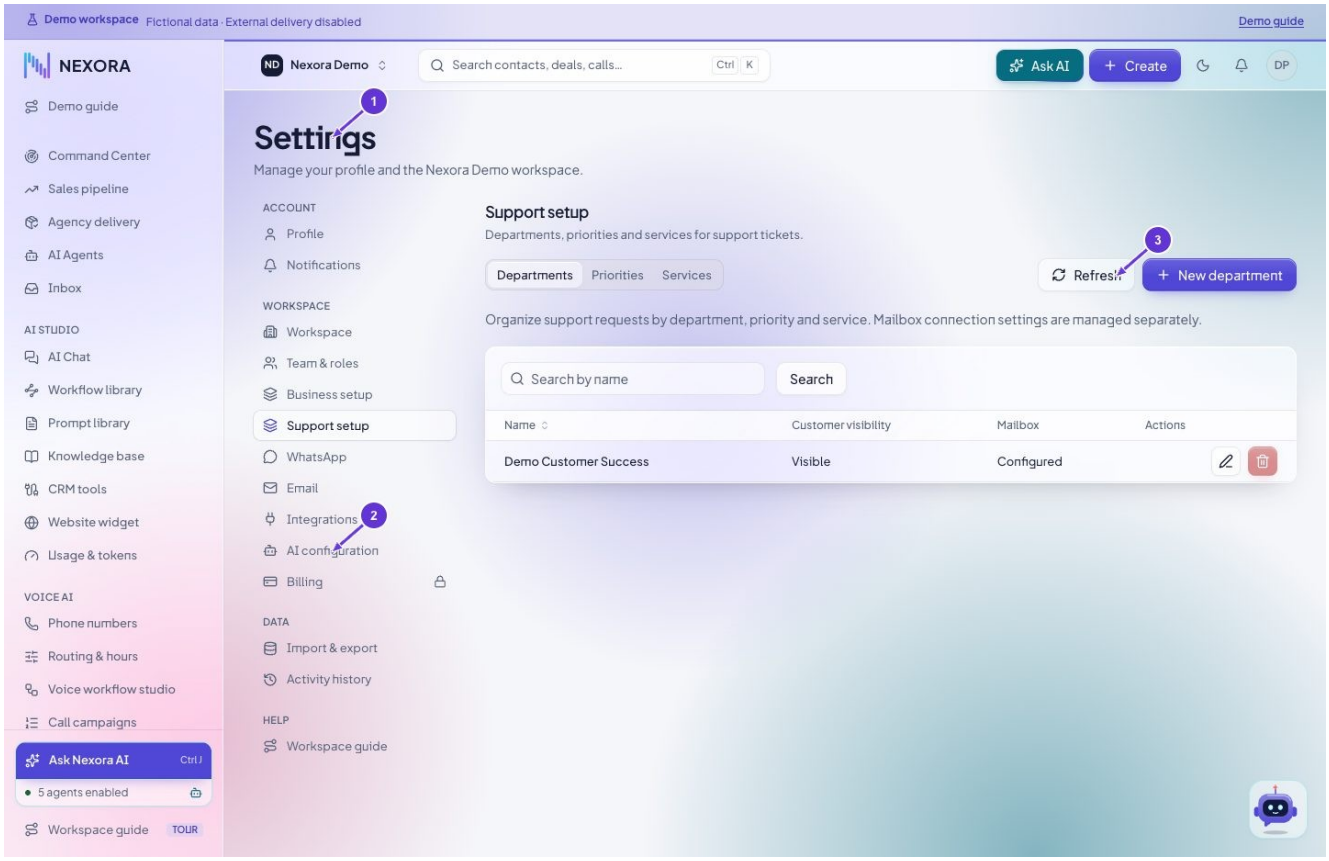


Figure 87 1 Settings · 2 AI configuration · 3 Refresh

Open in Nexora CRM

Support services

Open Support setup → Services. Review the service name, save and check the service options on a ticket.

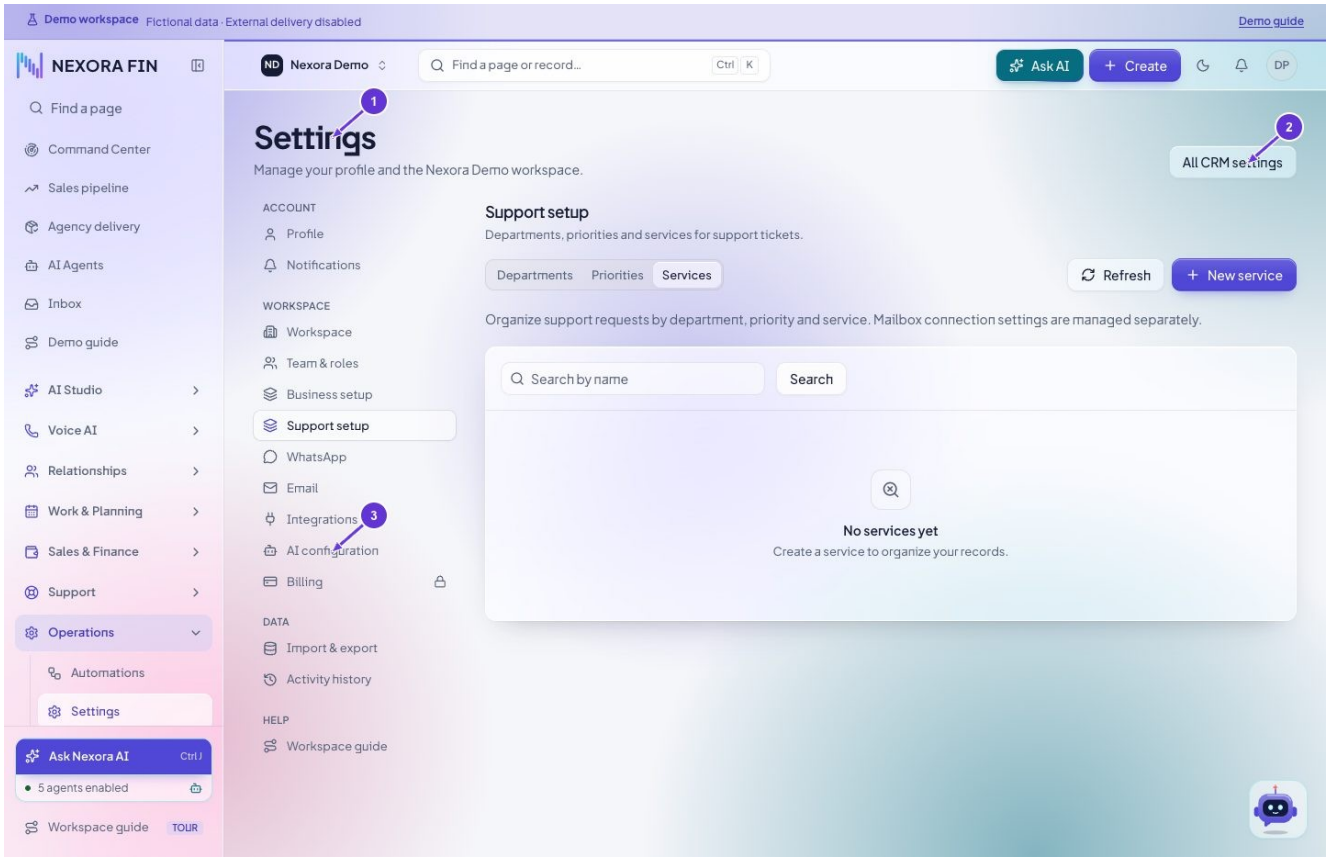


Figure 88 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Lead sources catalog

Open Business setup → Lead sources. Save the source and verify it appears on the Lead form before using it in imports or reports.

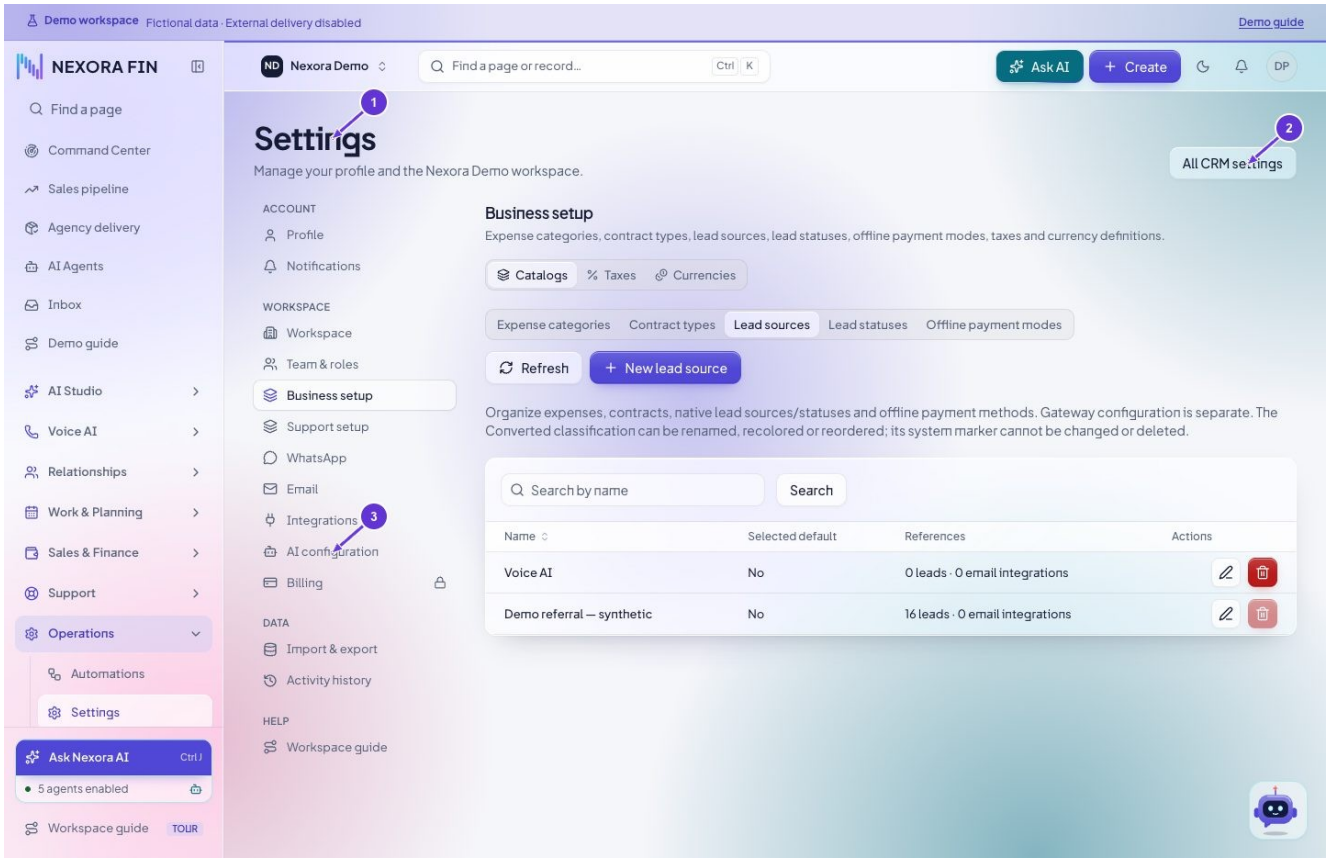


Figure 89 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Lead statuses catalog

Open Business setup → Lead statuses. Save the label and verify it appears on the Lead form and filters.

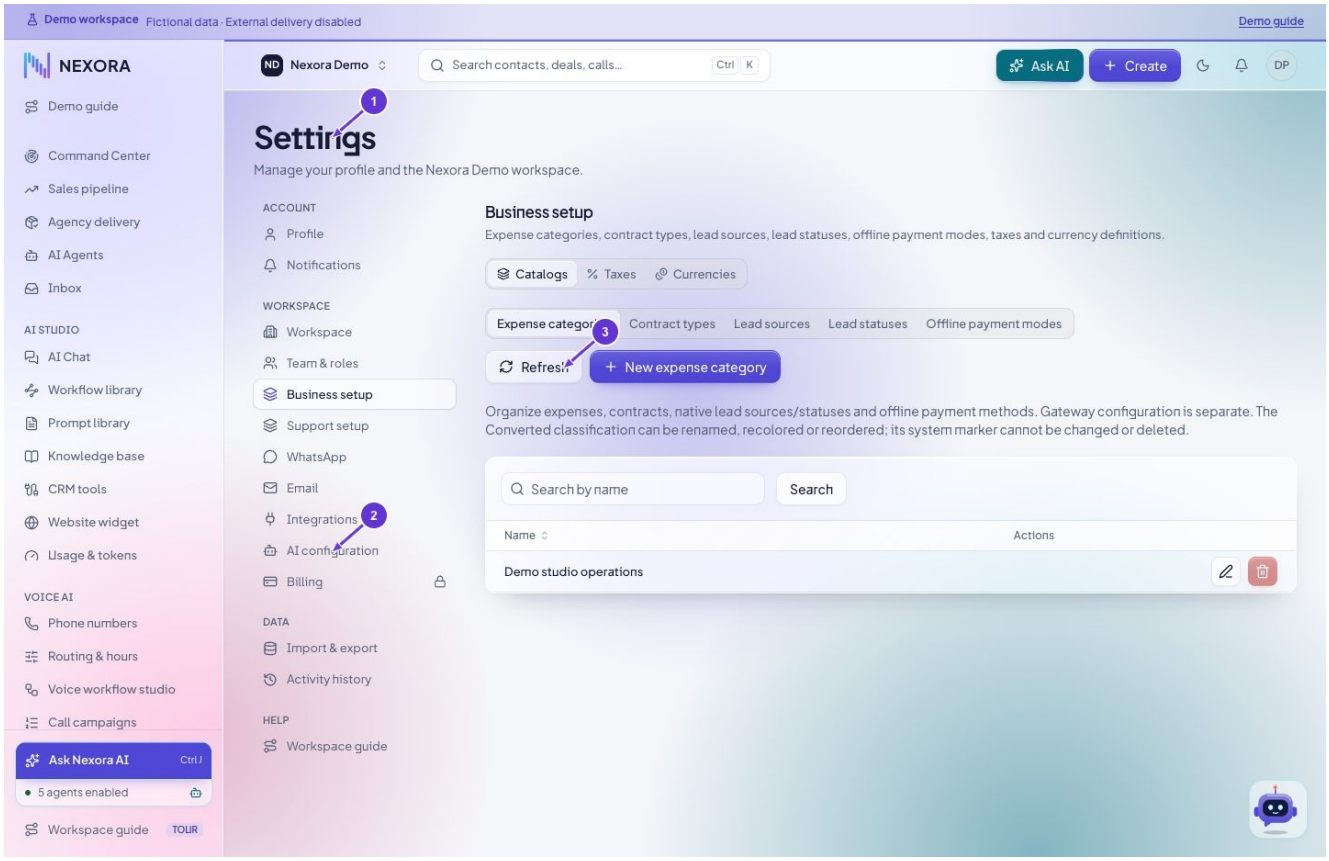


Figure 90 1 Settings · 2 AI configuration · 3 Refresh

Open in Nexora CRM

Expense categories catalog

Open Business setup → Expense categories. Save the label and verify it appears when creating an expense.

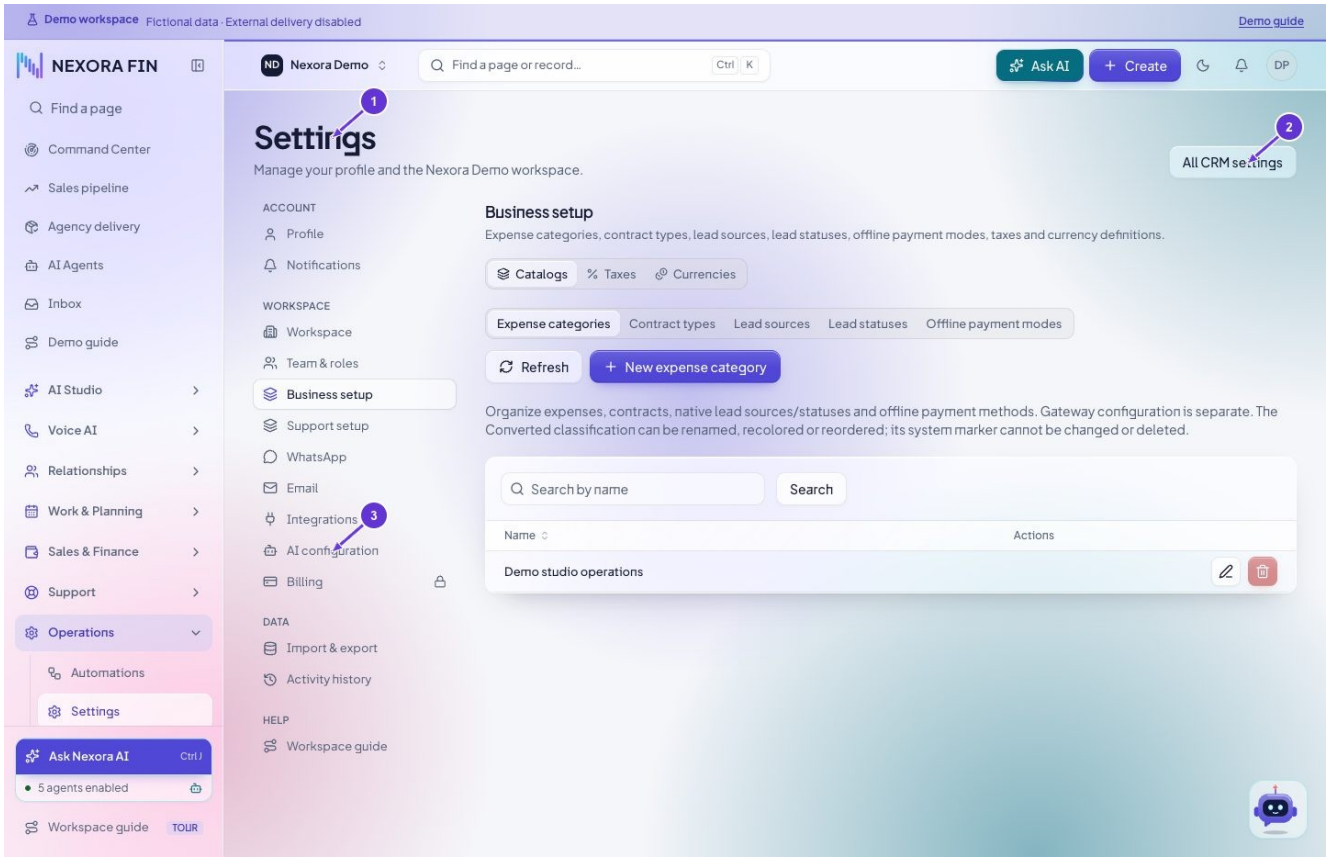


Figure 91 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Contract types catalog

Open Business setup → Contract types. Save the type and verify it appears when creating a contract.

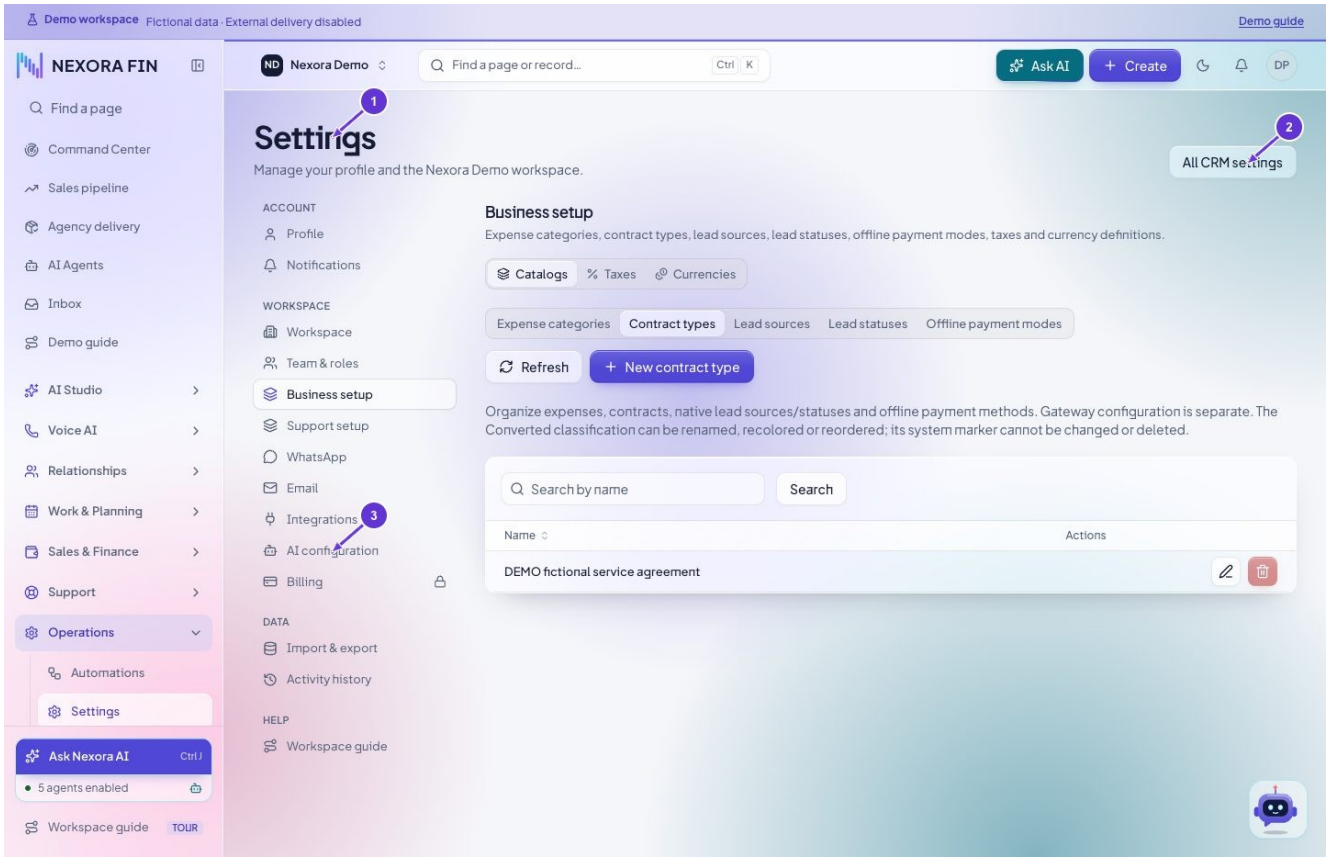


Figure 92 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Offline payment modes

Open Business setup → Payment modes. Review the label and availability, save and verify it appears in the payment form.

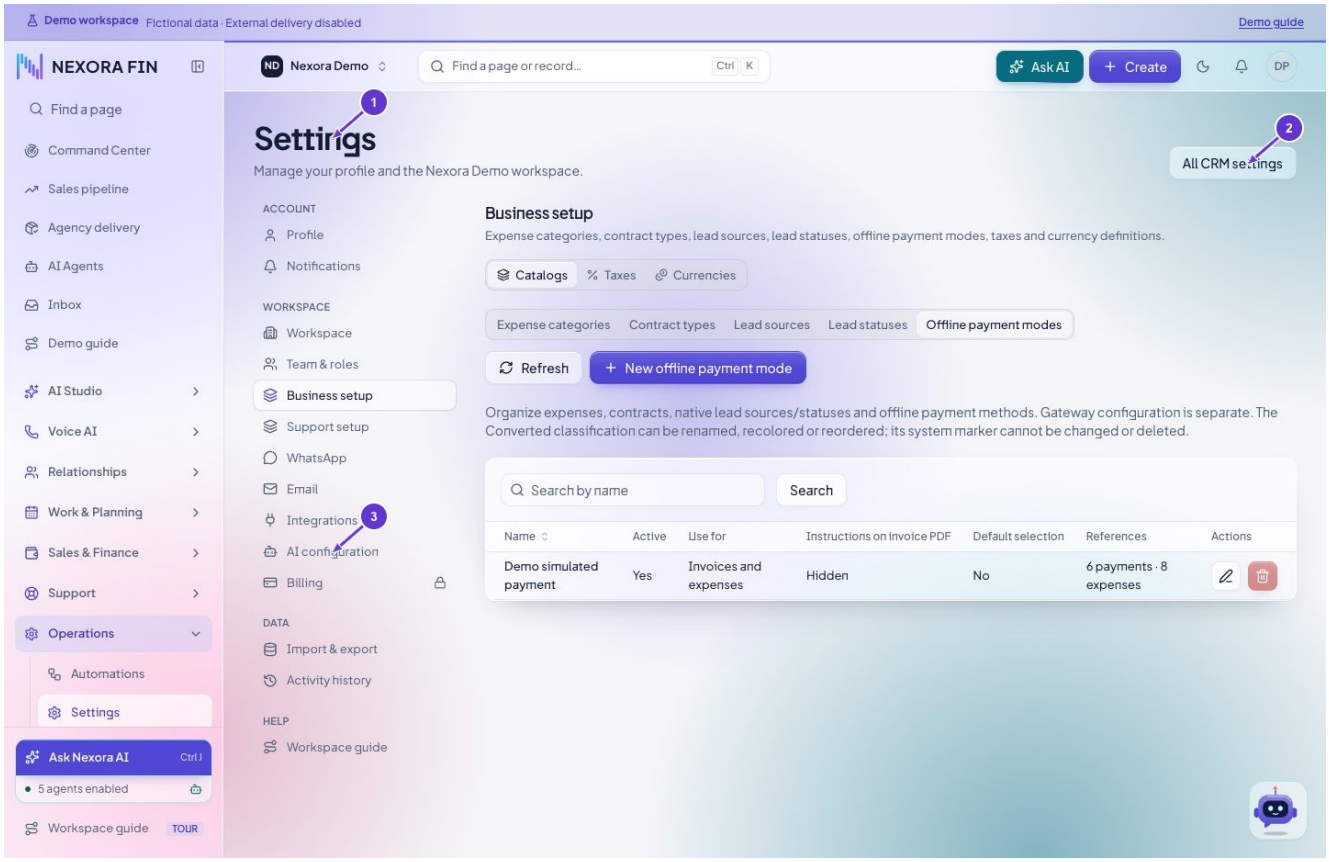


Figure 93 1 Settings · 2 All CRM settings · 3 AI configuration

Open in Nexora CRM

Branches

Open Administration → Branches. Select the branch to review its routing or workspace details. Check the exact branch after any change.

Open in Nexora CRM

Launch setup

Review the setup checklist by dependency. Confirm provider access, number assignment, required callbacks and a controlled test before enabling live traffic.

Open in Nexora CRM

Media

Find the file by name or folder and check permissions and location. Use the visible file actions and confirm the exact item afterward.

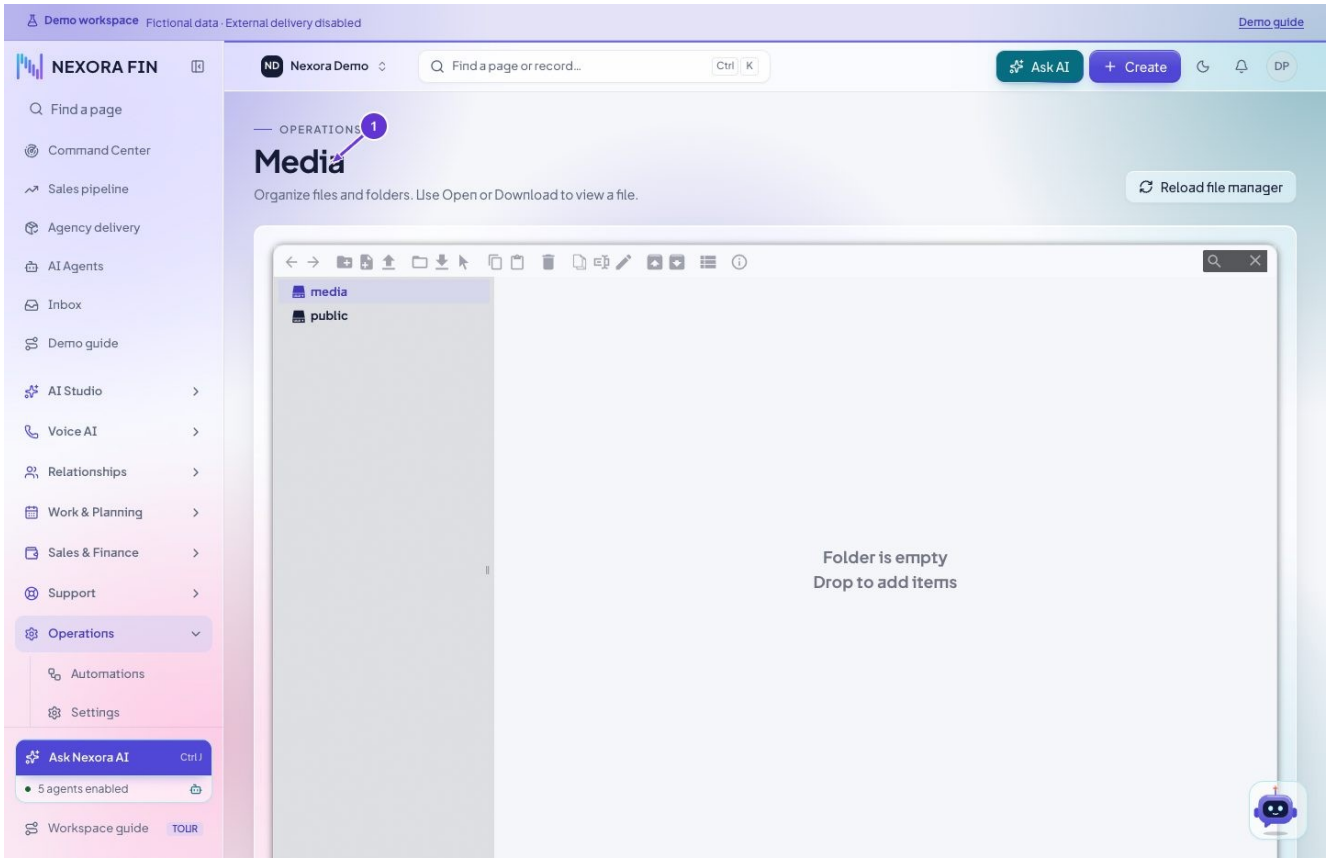


Figure 94 1 Media

Open in Nexora CRM

Activity log

Search by time, staff member or recorded action. Match the result to the source record. treat missing entries as unconfirmed activity.

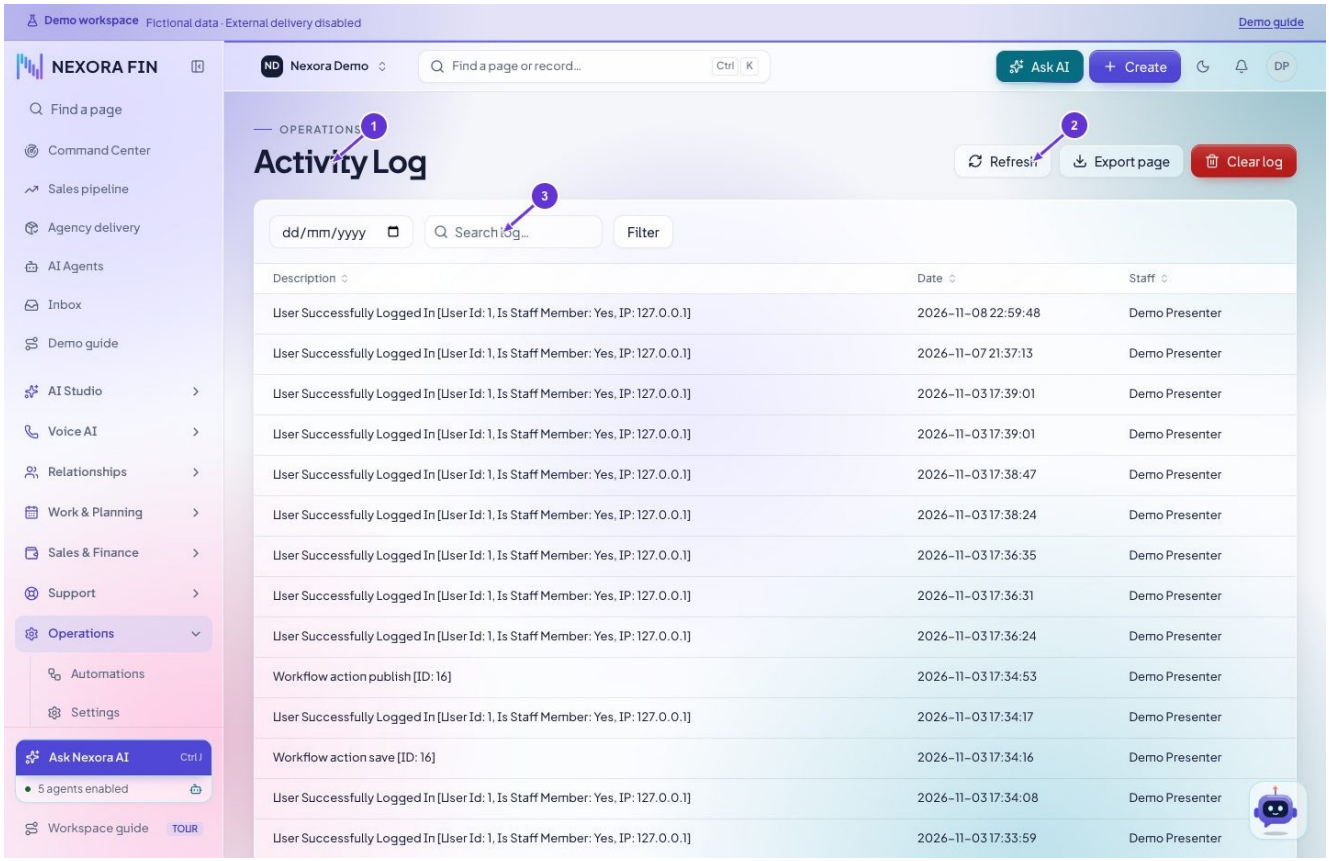


Figure 95 1 Activity Log · 2 Refresh · 3 Search log

Open in Nexora CRM

Backups

Review available backup records and module status. Use only the backup or restore actions authorized by your organization.

Open in Nexora CRM

All CRM settings

Open Administration → All CRM settings. Search for the feature or configuration group and open its matching editor. save and reopen to verify any change.

Open in Nexora CRM

Staff

Open Administration → Staff, select the staff member or create one if permitted. Verify the role and access, save, then review the staff record.

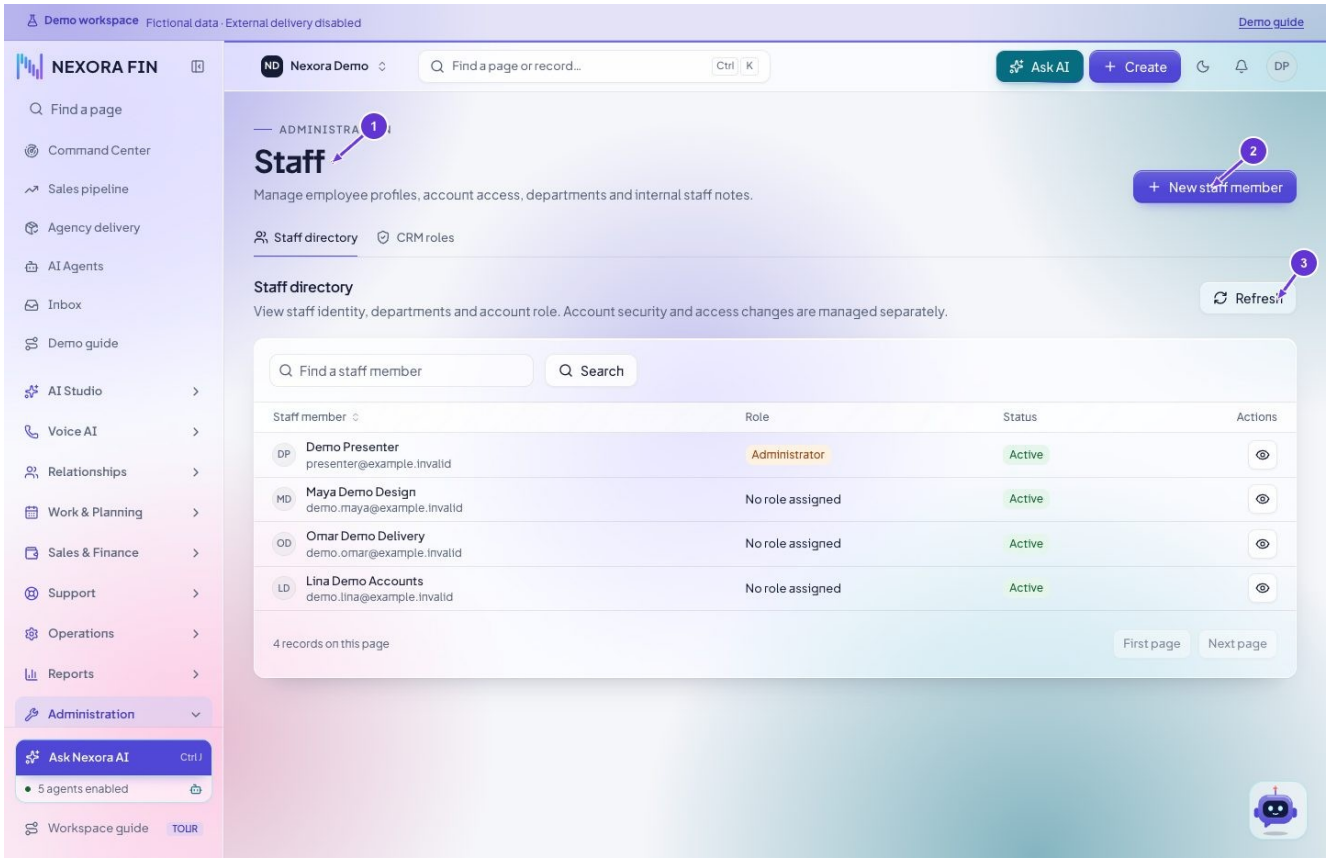


Figure 96 1 Staff · 2 New staff member · 3 Refresh

Open in Nexora CRM

Modules

Inspect the module name and installed status. Review what the module controls before changing its state, then verify the relevant pages after any permitted change.

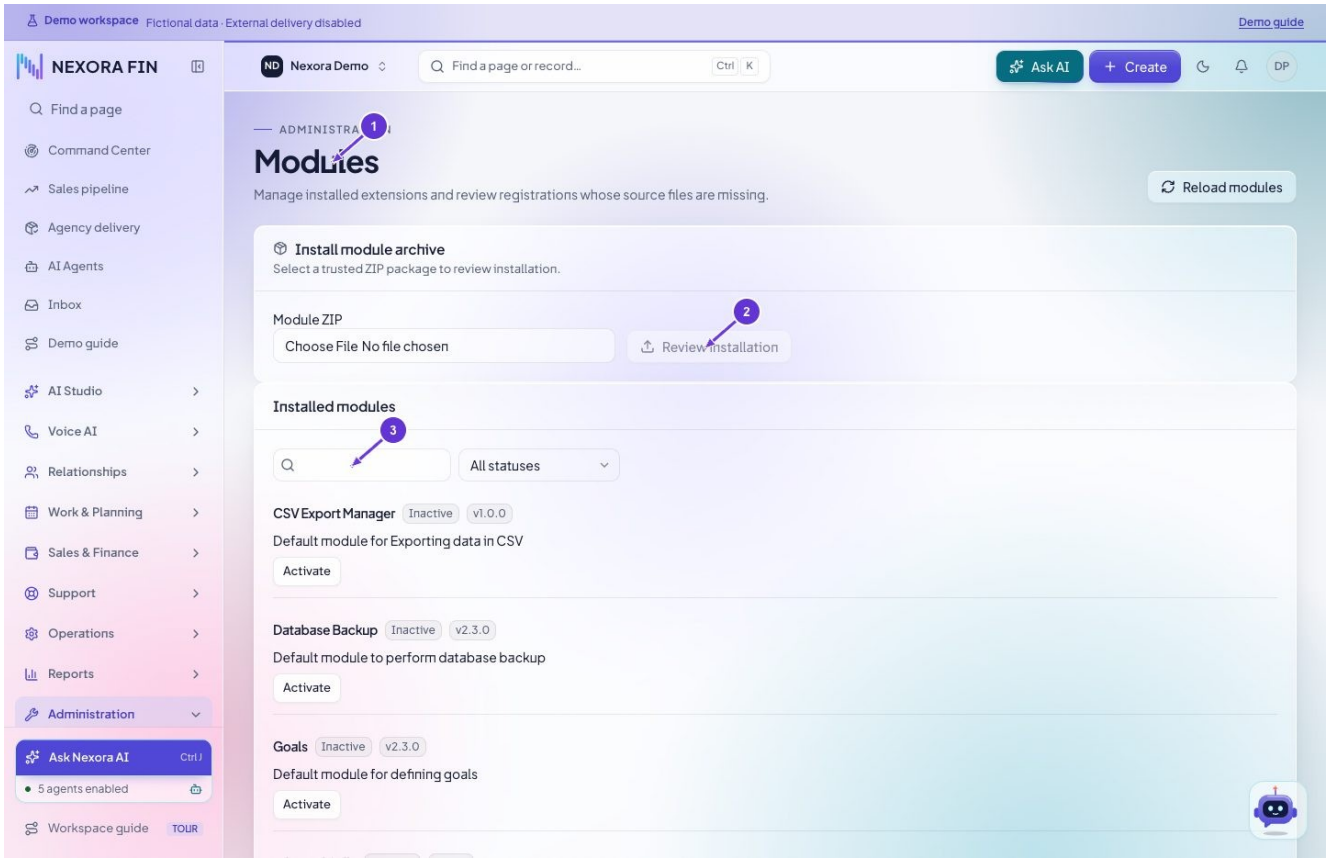


Figure 97 1 Modules · 2 Review installation · 3 Search modules

Open in Nexora CRM

Custom fields

Choose the target record type, field type and visibility, then save. Reopen a record of that type to verify placement and required-field behavior.

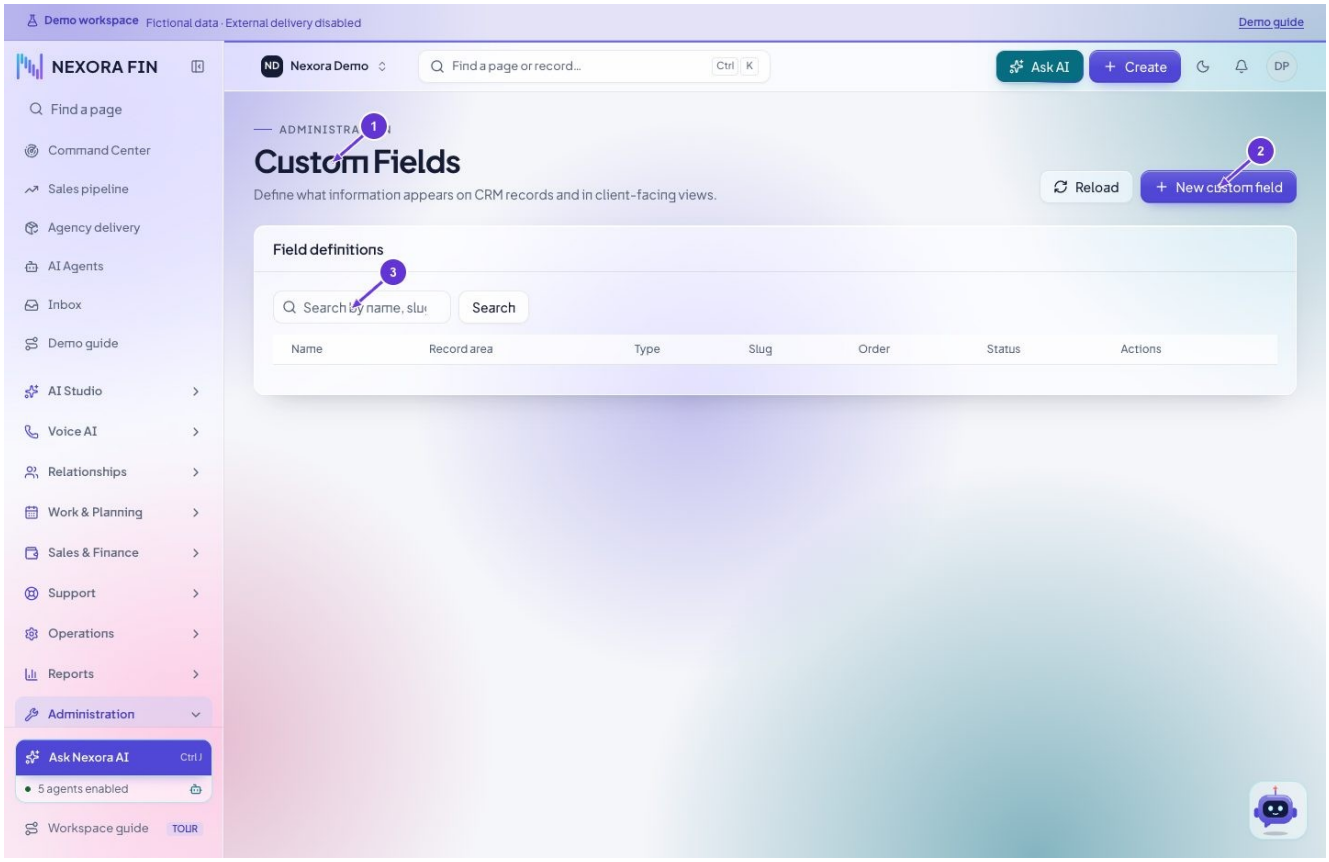


Figure 98 1 Custom Fields · 2 New custom field · 3 Search custom fields

Open in Nexora CRM

Email templates

Select the correct template and language, edit subject or body and preserve required merge fields. Save and preview before a controlled send.

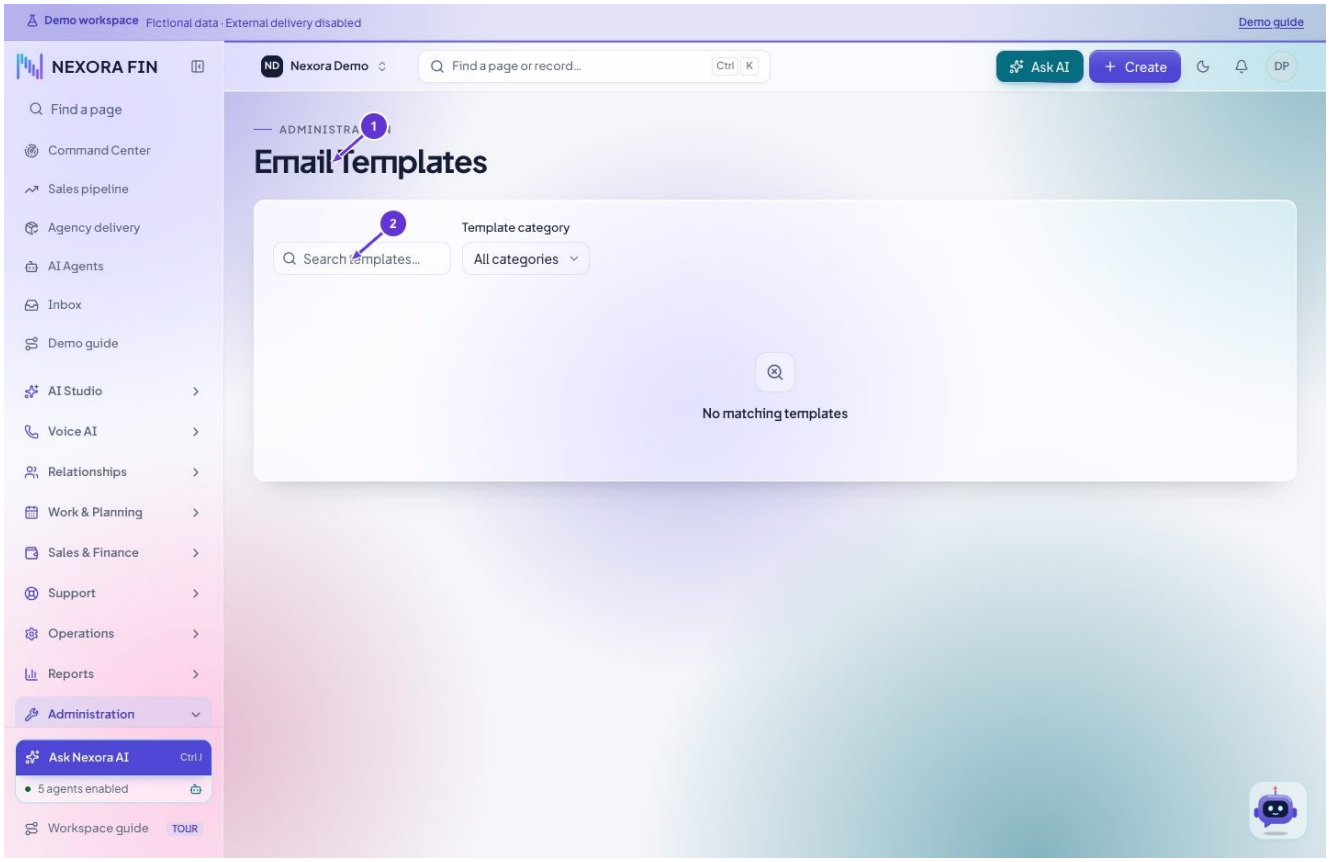


Figure 99 1 Email Templates · 2 Search templates

Open in Nexora CRM

WhatsApp delivery checks

Verify the active sender and current provider connection in WhatsApp settings. Use the webhook URL and verification settings shown for that connection. Confirm consent, provider approval and the template when required. Use the message record and provider receipt to distinguish accepted, delivered and failed.

Open in Nexora CRM

10 Core CRM settings reference

Calendar General tab

Open Calendar settings → General and review event visibility and display options. Save and reopen Calendar.

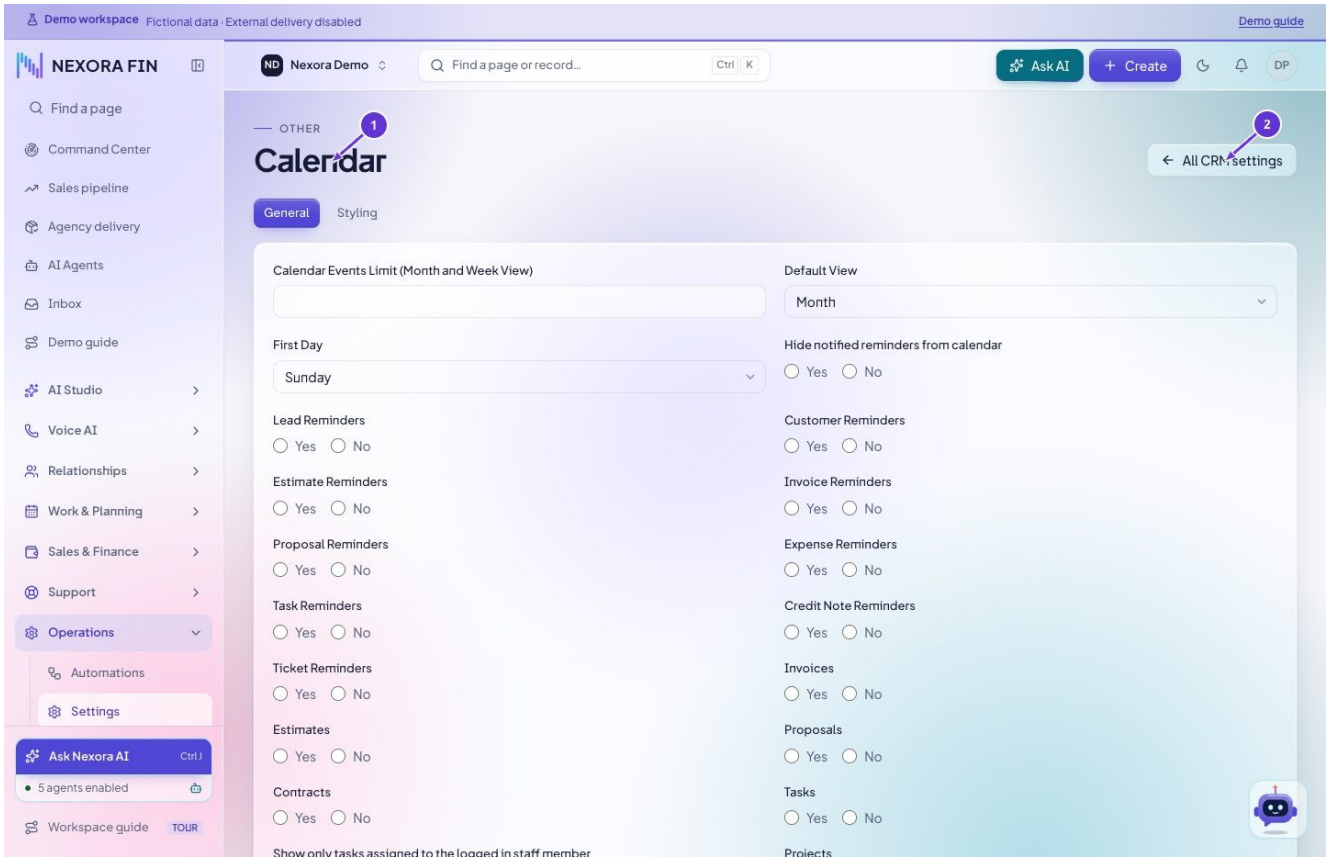


Figure 100 1 Calendar · 2 All CRM settings

Open in Nexora CRM

Calendar Colors tab

Open Calendar settings → Colors and review the color for each event type. Save and verify in Calendar.

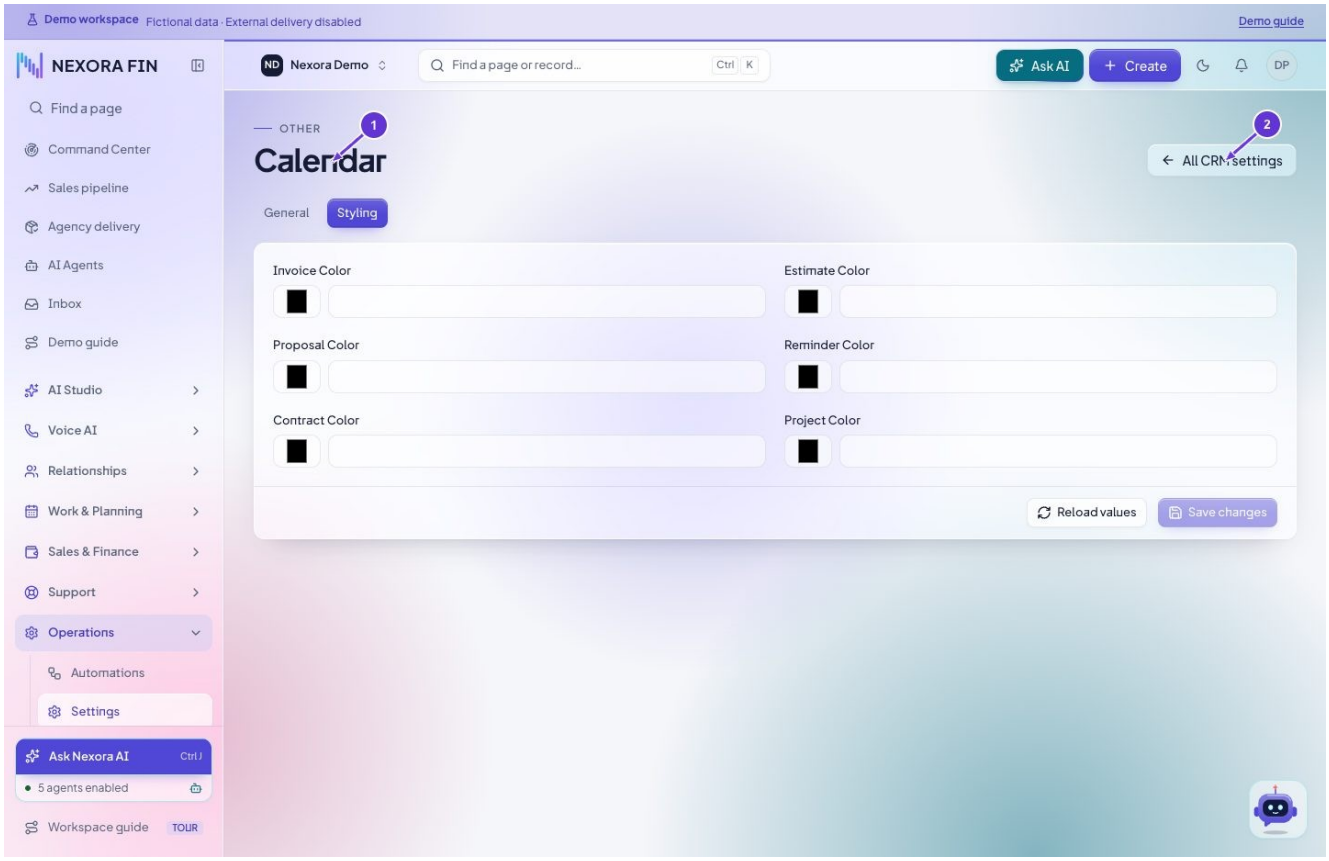


Figure 101 1 Calendar · 2 All CRM settings

Open in Nexora CRM

PDF General tab

Open PDF settings → General. Review document layout options, save and preview a representative document.

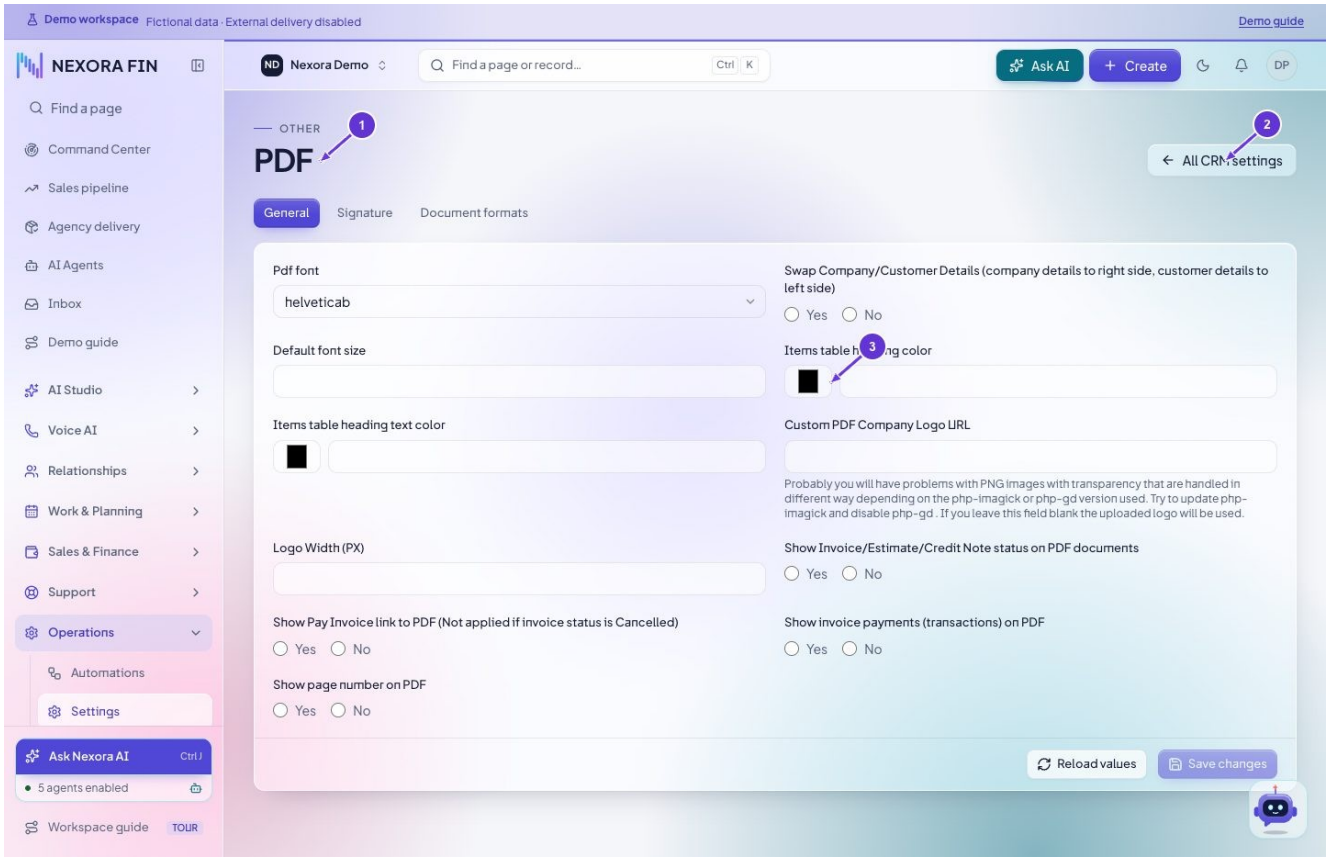


Figure 102 1 PDF · 2 All CRM settings · 3 Items table heading color color picker

Open in Nexora CRM

PDF Signature tab

Open PDF settings → Signature, review the approved signature settings, save, and check a PDF preview.

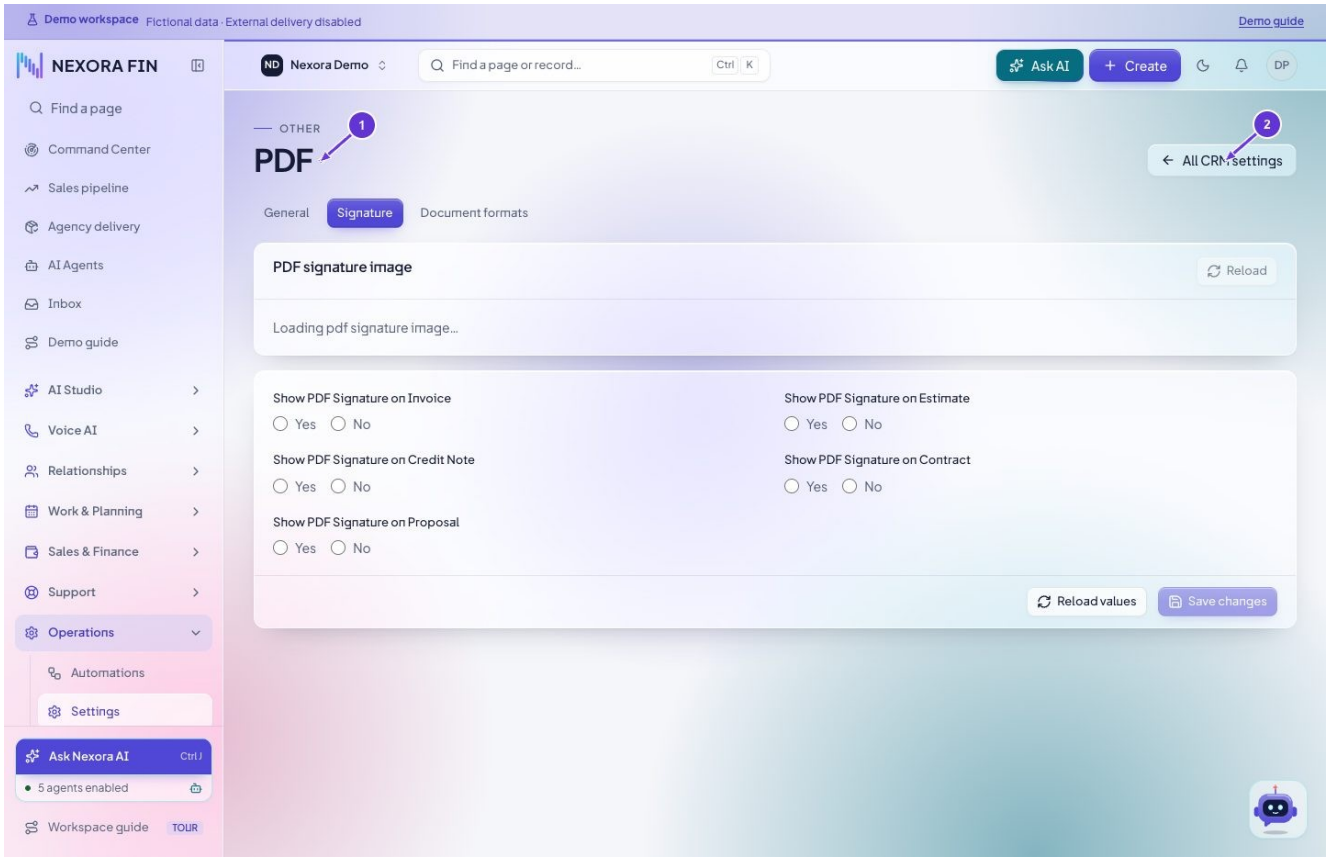


Figure 103 1 PDF · 2 All CRM settings

Open in Nexora CRM

PDF Formats tab

Open PDF settings → Formats. Select the intended page format, save, and verify the output PDF.

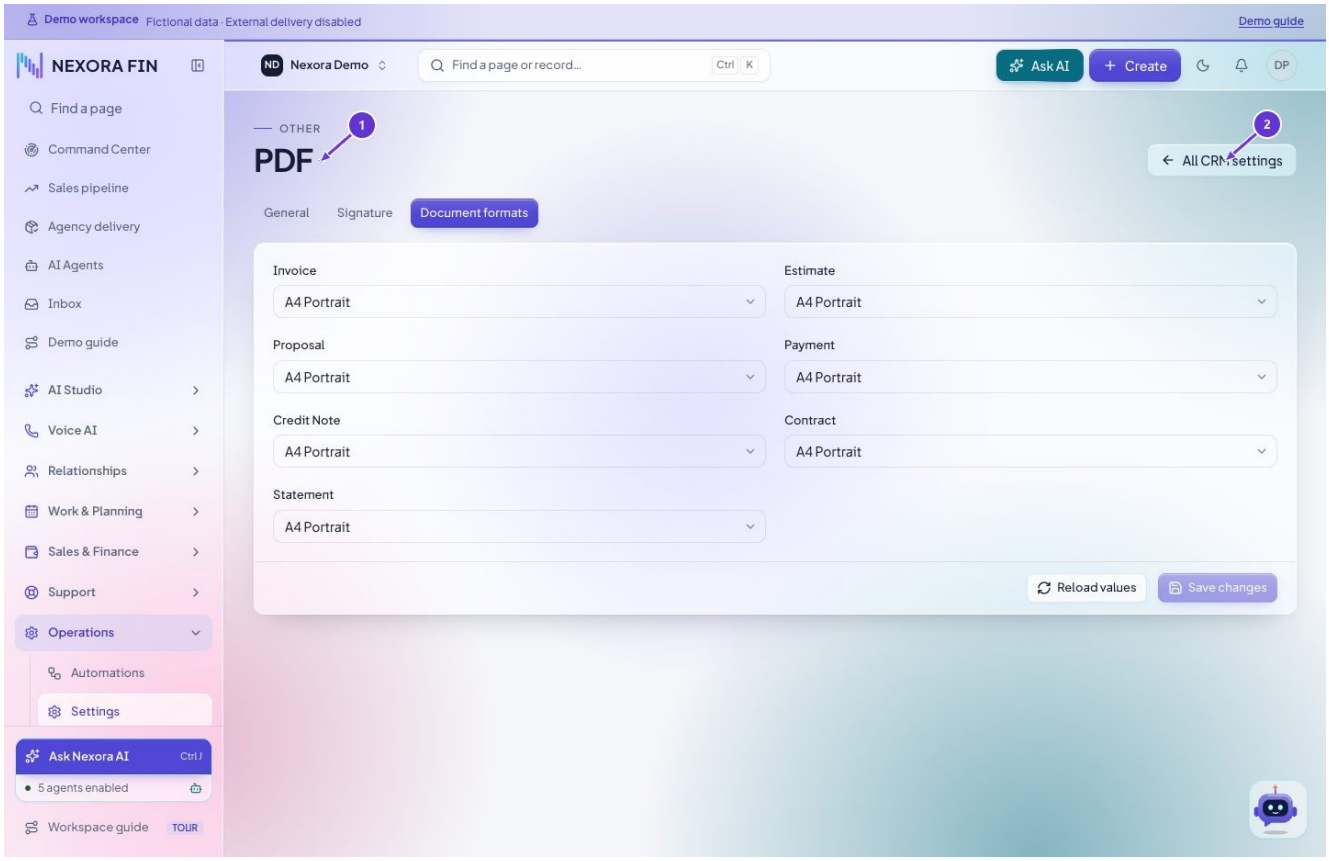


Figure 104 1 PDF · 2 All CRM settings

Open in Nexora CRM

Tickets General tab

Open Ticket defaults → General and review ticket behavior, visibility and defaults. Save, then verify with a controlled ticket.

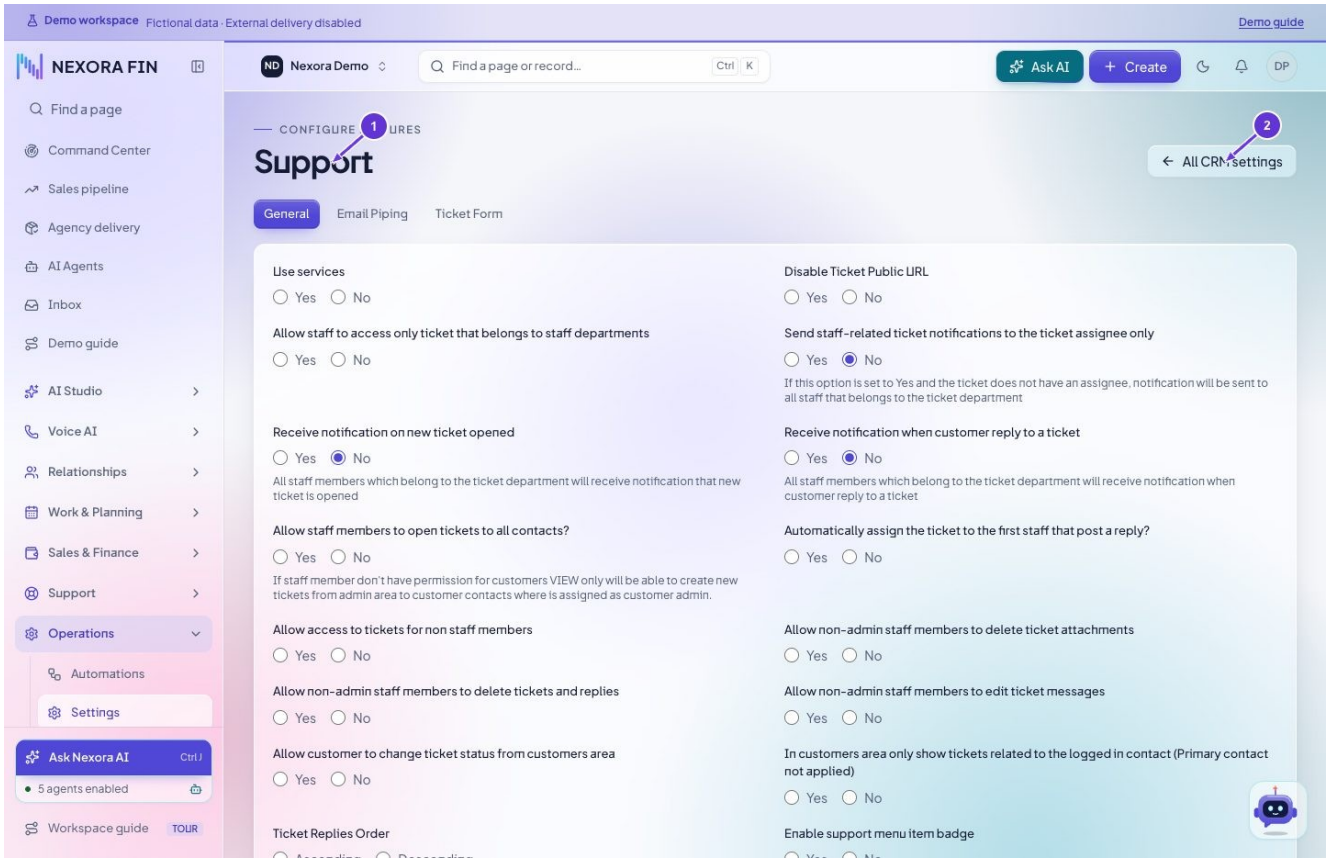


Figure 105 1 Support · 2 All CRM settings

Open in Nexora CRM

Ticket email piping tab

Open Ticket defaults → Email piping and review incoming mail processing. Compare a controlled incoming message with the incoming support email log and its ticket.

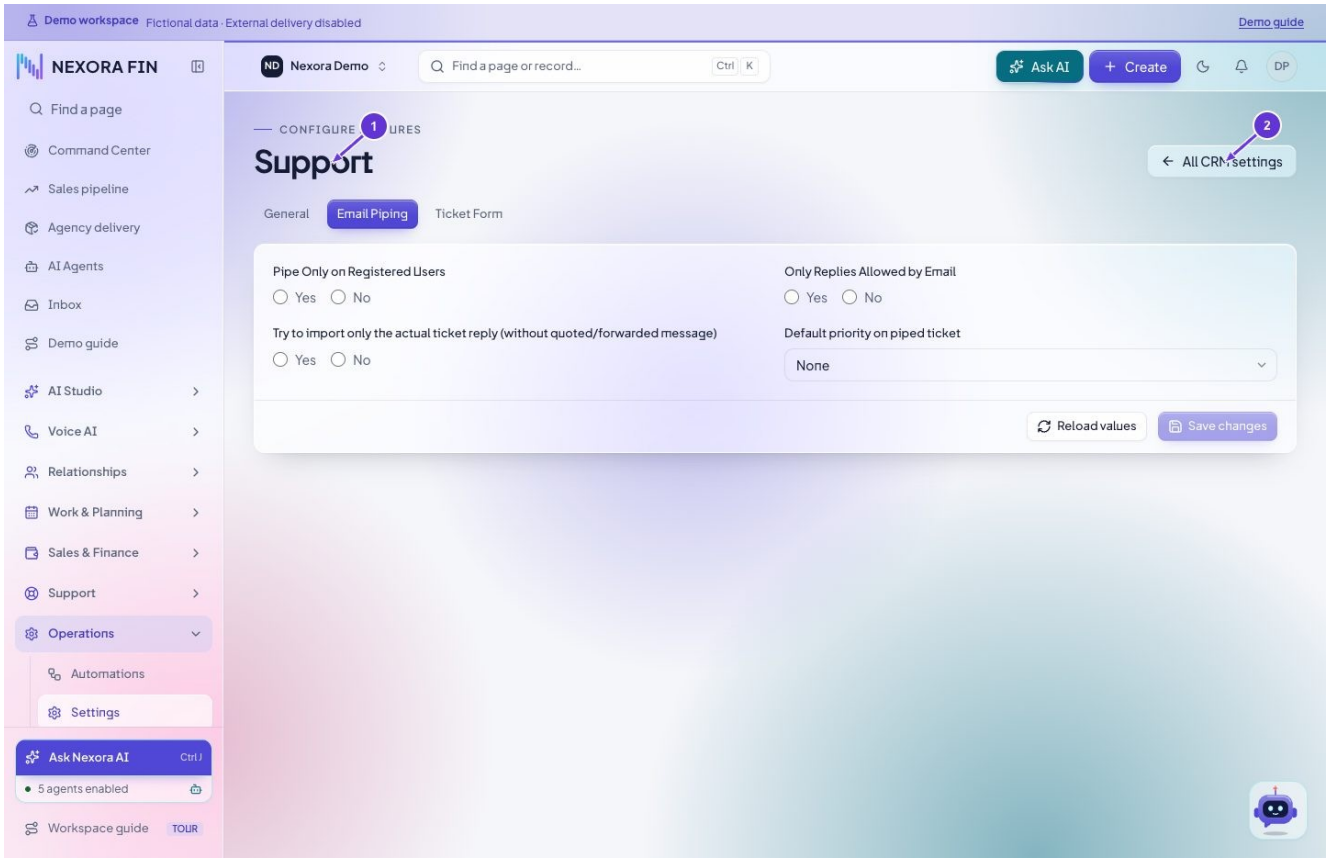


Figure 106 1 Support · 2 All CRM settings

Open in Nexora CRM

Ticket Form tab

Open Ticket defaults → Ticket Form, review the form behavior, save, and verify the form using the intended client role.

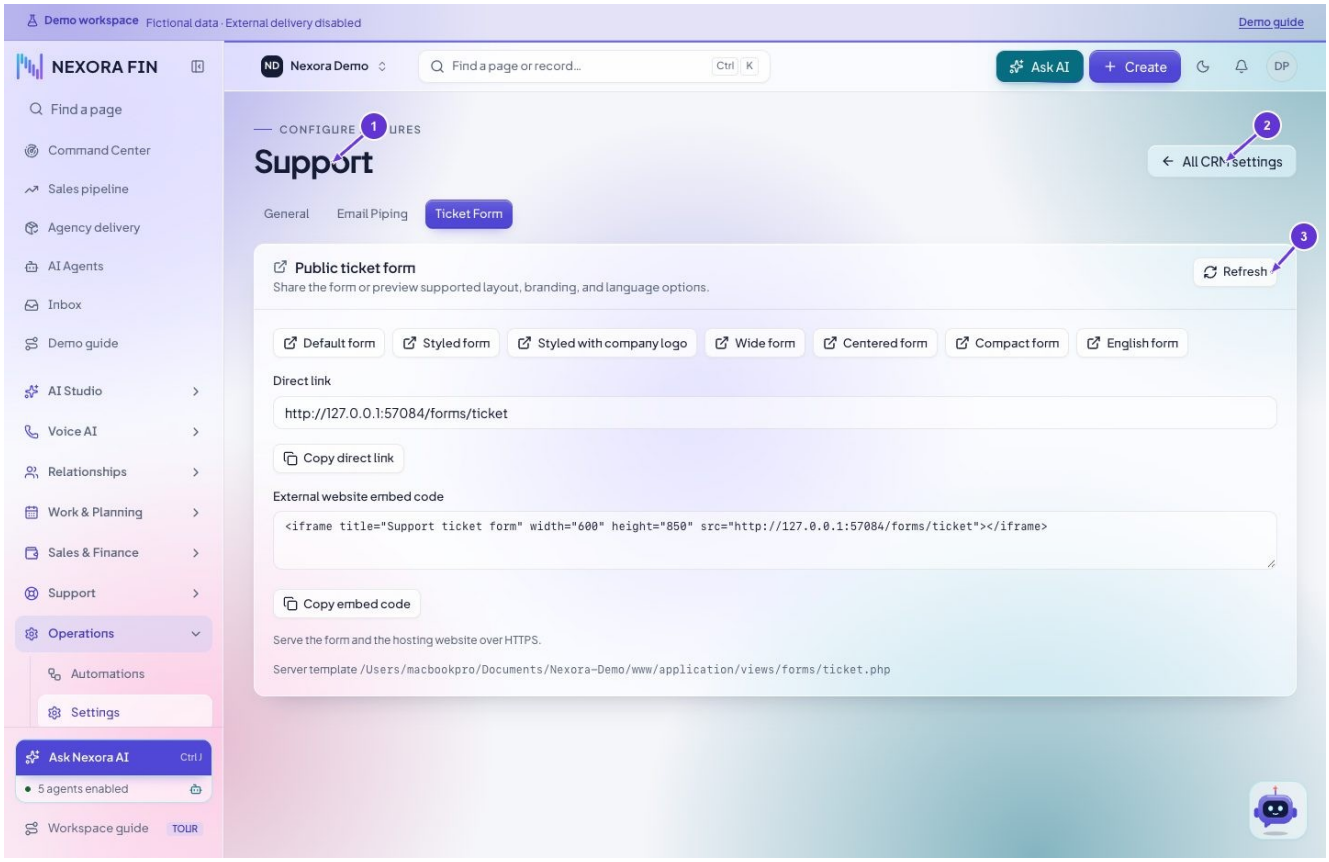


Figure 107 1 Support · 2 All CRM settings · 3 Refresh

Open in Nexora CRM

Cron command tab

Open Scheduled jobs → Cron command. Review the configured command and last execution, then verify the scheduler on the host and the resulting job evidence.

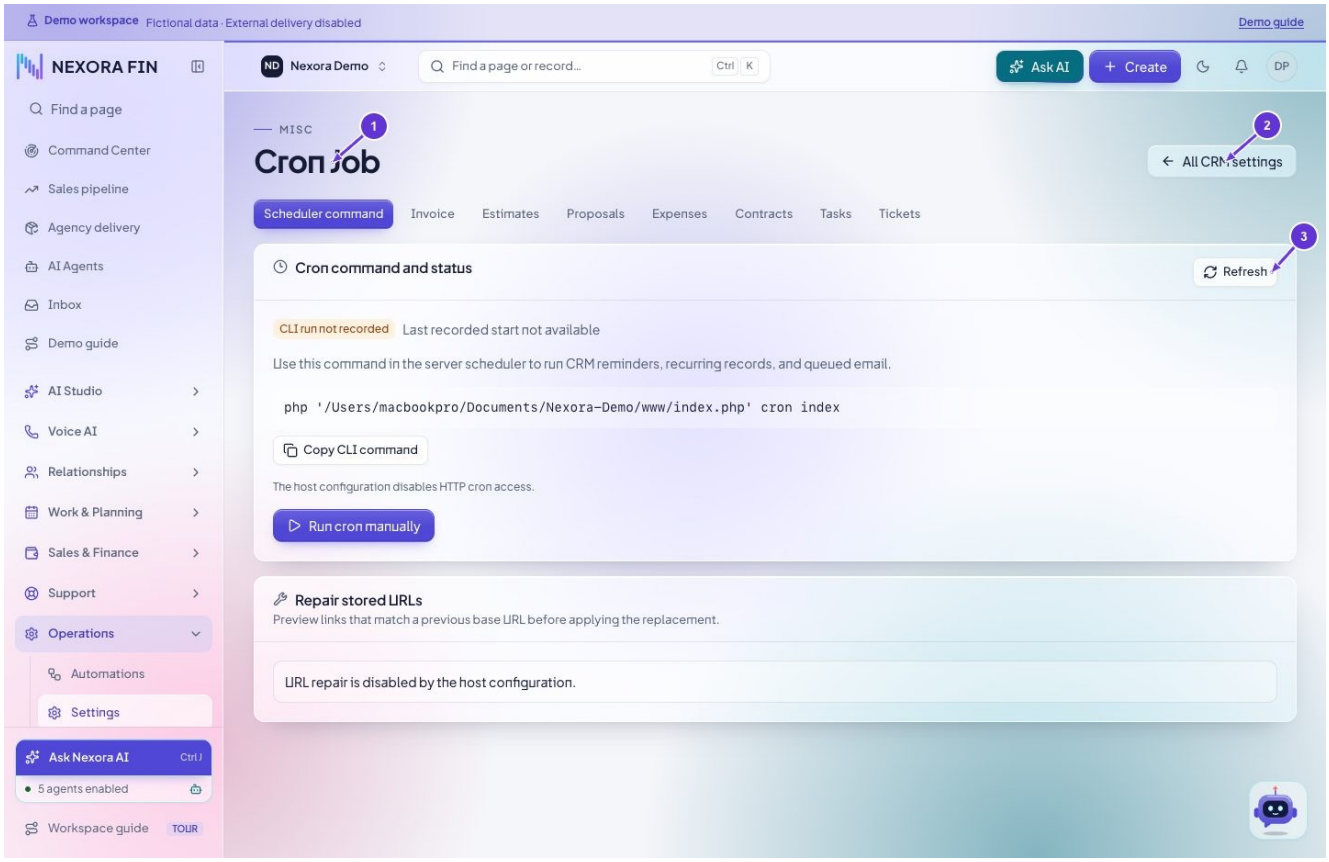


Figure 108 1 Cron Job · 2 All CRM settings · 3 Refresh

Open in Nexora CRM

Scheduled invoice jobs

Open the invoice tab under Scheduled jobs and review the invoice automation rules. Check an eligible invoice and its recorded outcome.

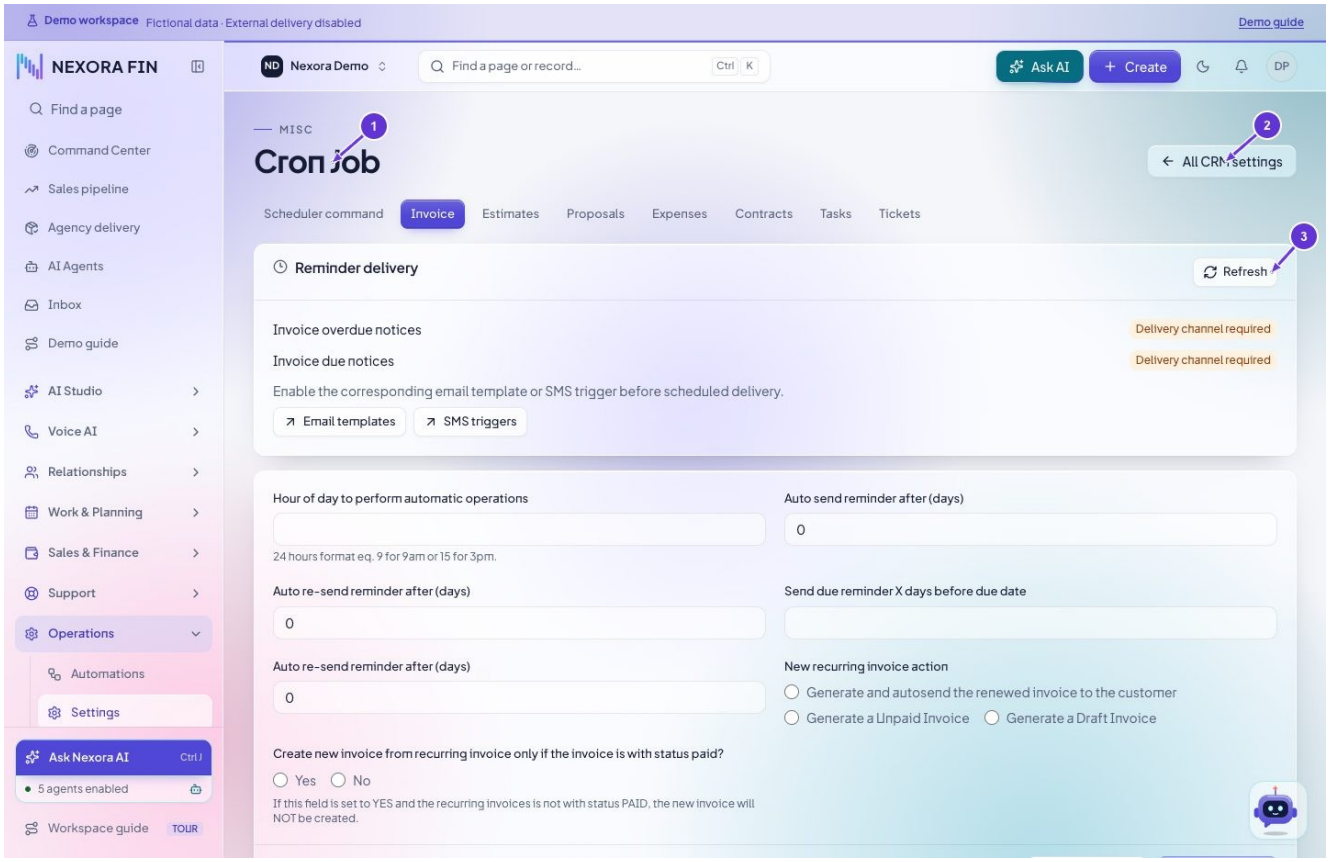


Figure 109 1 Cron Job · 2 All CRM settings · 3 Refresh

Open in Nexora CRM

Scheduled task jobs

Open the tasks tab under Scheduled jobs. Review the task automation rules and verify the next eligible record in Tasks.

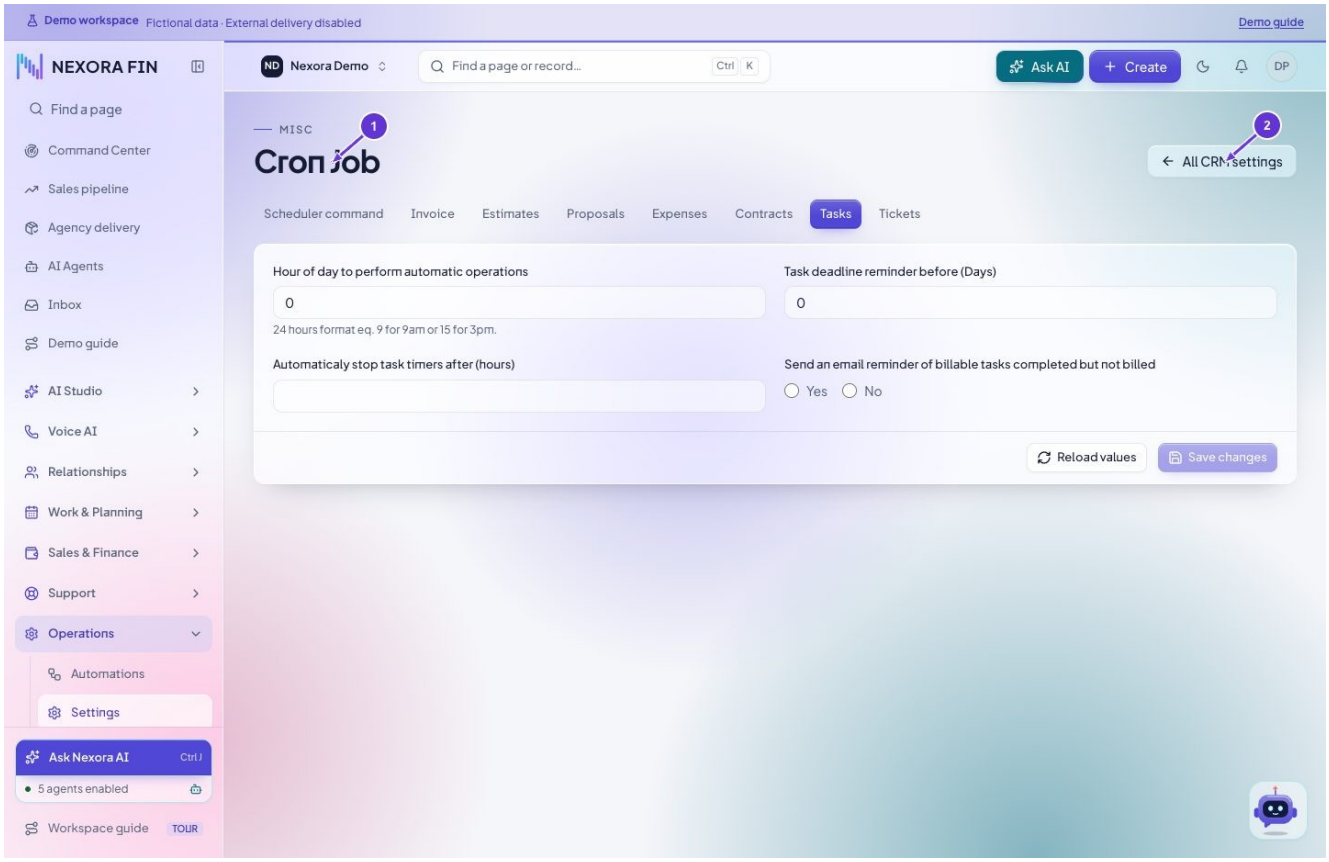


Figure 110 1 Cron Job · 2 All CRM settings

Open in Nexora CRM

Scheduled contract jobs

Open the contracts tab under Scheduled jobs. Review expiry and related reminders, then verify their outcomes on an eligible contract.

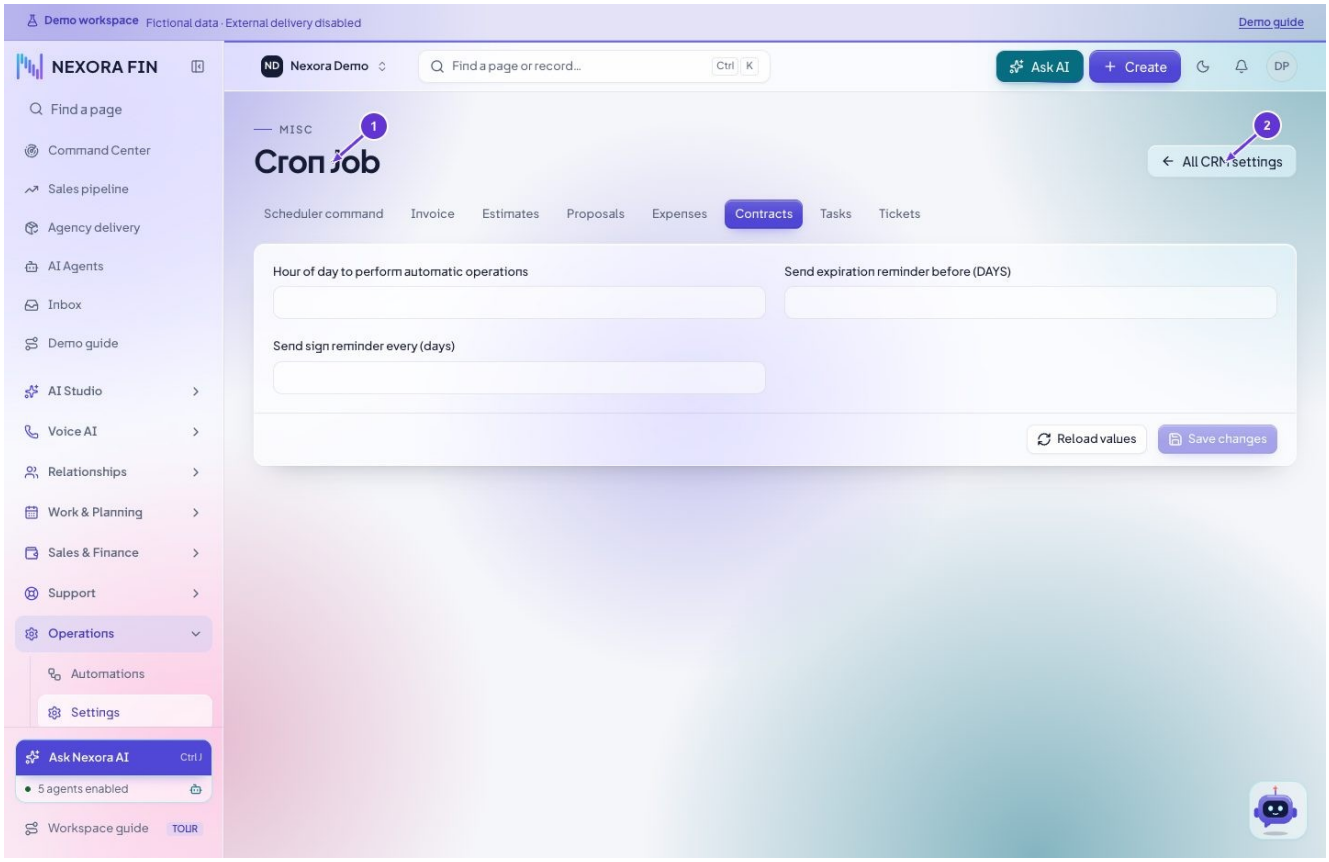


Figure 111 1 Cron Job · 2 All CRM settings

Open in Nexora CRM

Scheduled ticket jobs

Open the tickets tab under Scheduled jobs. Review any ticket maintenance rules and confirm the resulting change on an eligible ticket.

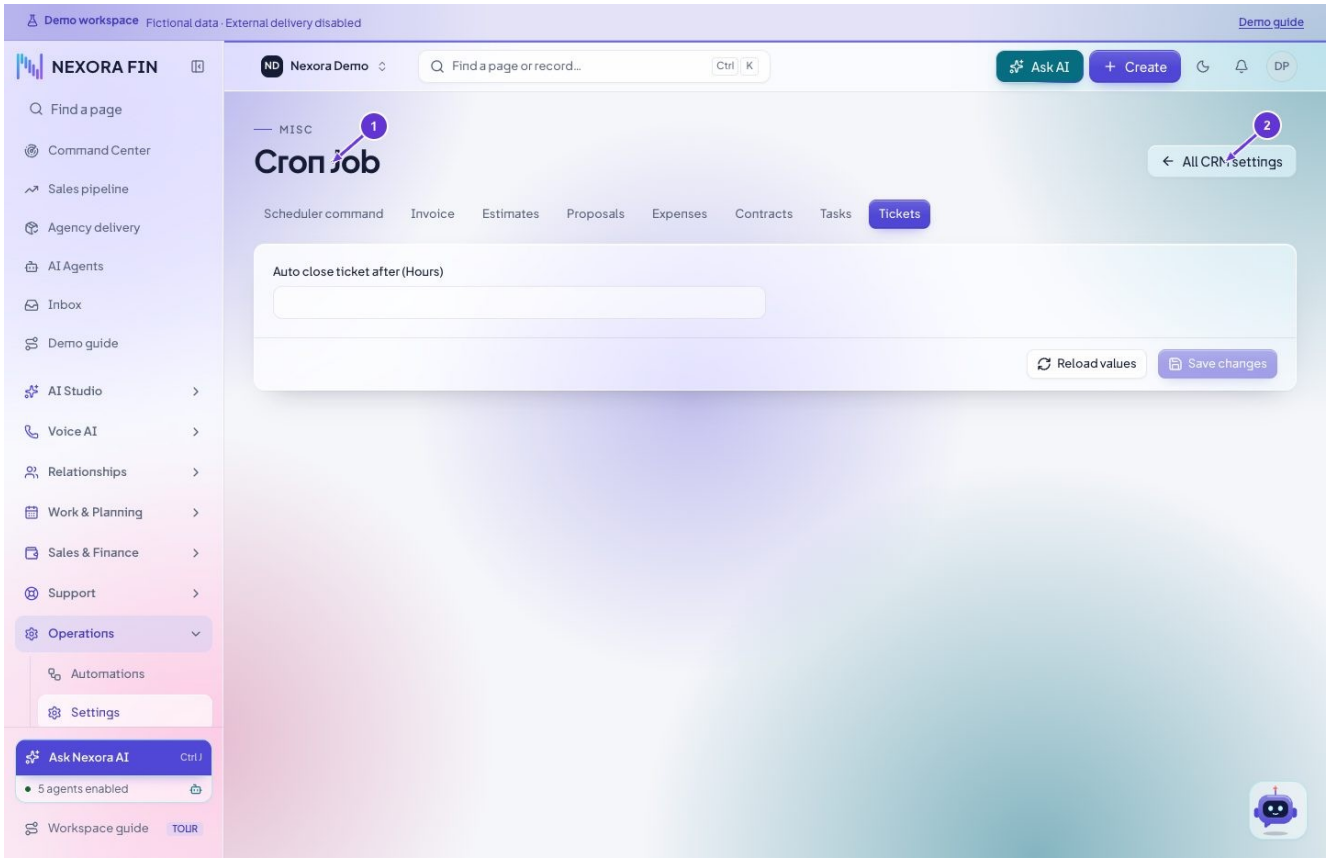


Figure 112 1 Cron Job · 2 All CRM settings

Open in Nexora CRM

Scheduled estimate jobs

Open the estimates tab under Scheduled jobs. Review reminders and status behavior, then verify the result on an eligible estimate.

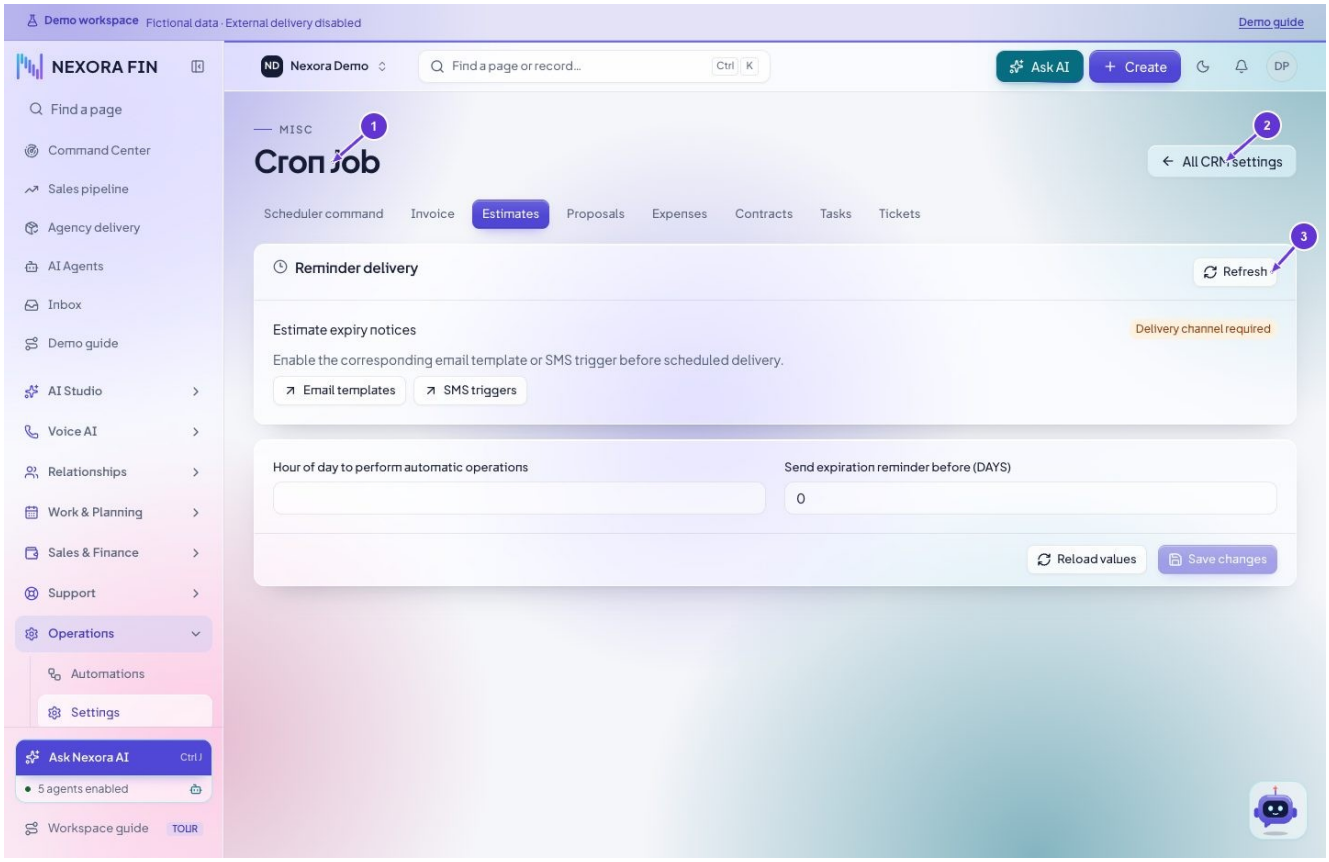


Figure 113 1 Cron Job · 2 All CRM settings · 3 Refresh

Open in Nexora CRM

Scheduled proposal jobs

Open the proposals tab under Scheduled jobs. Review expiry and notification behavior, and verify the result on an eligible proposal.

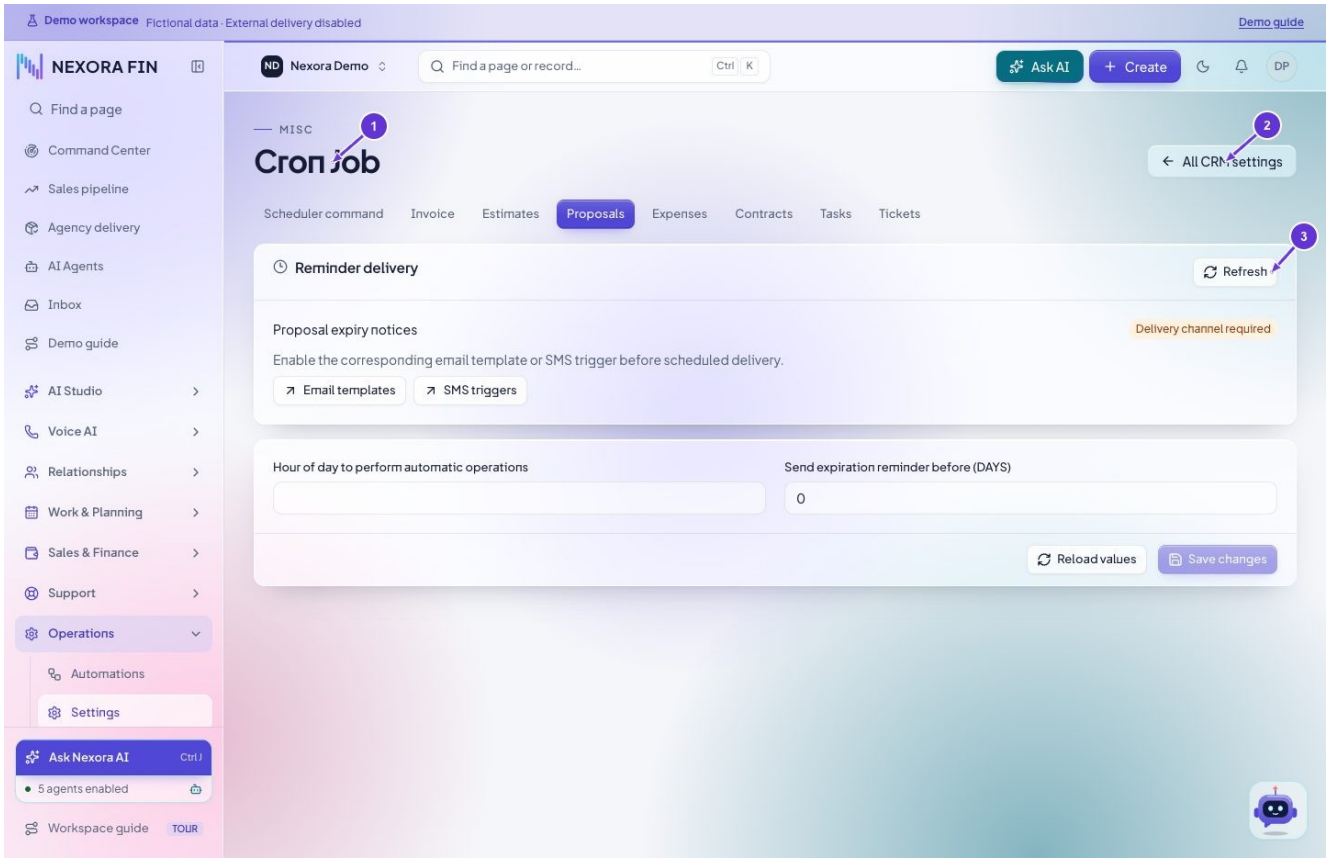


Figure 114 1 Cron Job · 2 All CRM settings · 3 Refresh

Open in Nexora CRM

Miscellaneous General tab

Open Miscellaneous and review the General tab. Check the relevant setting and verify the feature after saving.

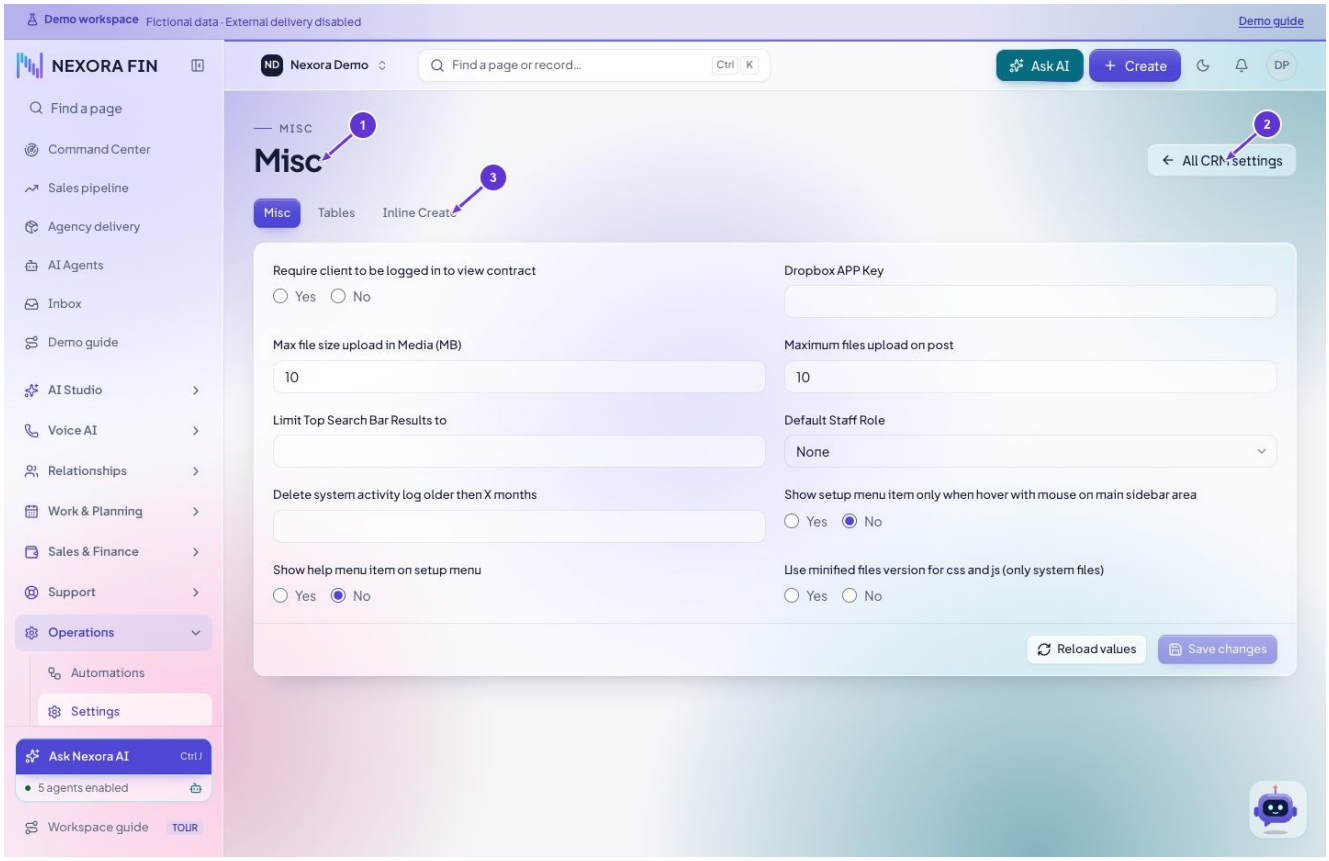


Figure 115 1 Misc · 2 All CRM settings · 3 Inline Create

Open in Nexora CRM

Table settings tab

Open Miscellaneous → Table settings and review table display options. Save and reopen the affected list.

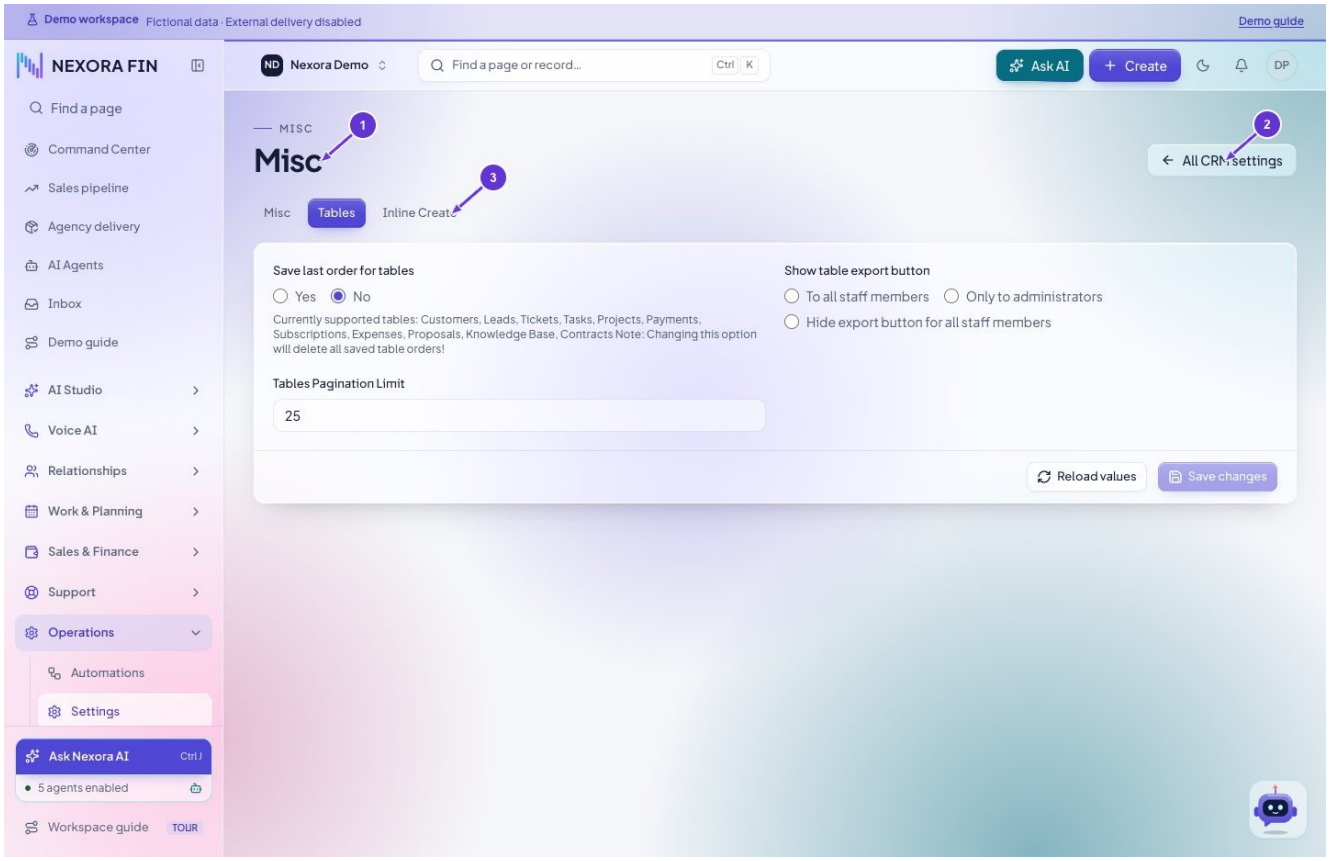


Figure 116 1 Misc · 2 All CRM settings · 3 Inline Create

Open in Nexora CRM

Inline creation tab

Open Miscellaneous → Inline creation. Review which inline controls are enabled, save, and verify on a relevant form.

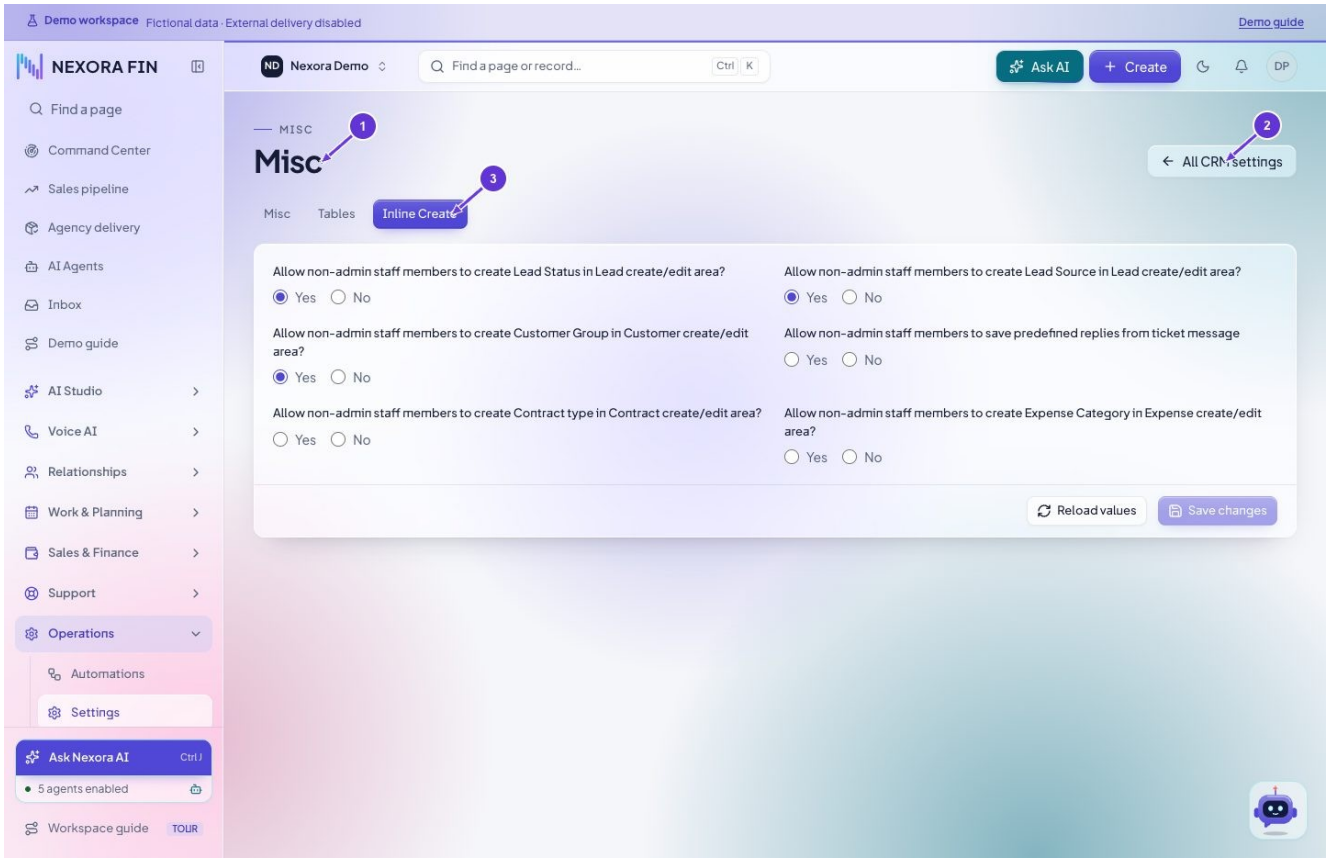


Figure 117 1 Misc · 2 All CRM settings · 3 Inline Create

Open in Nexora CRM

General CRM settings

Review general preferences and system defaults. Save only the intended fields and reload the group.

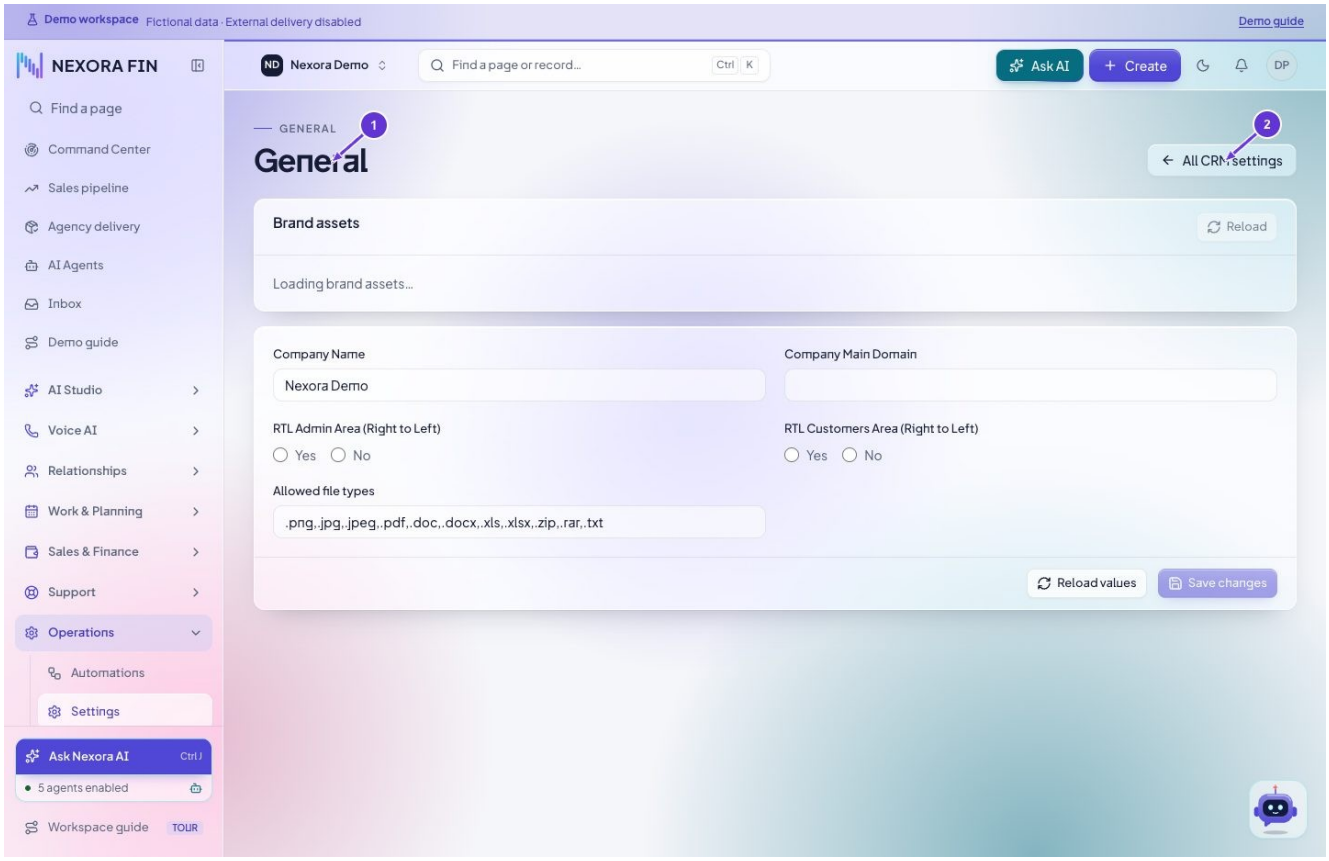


Figure 118 1 General · 2 All CRM settings

Open in Nexora CRM

Company information

Review the legal name, address and contact details used on documents. Save and preview a document to confirm the company information.

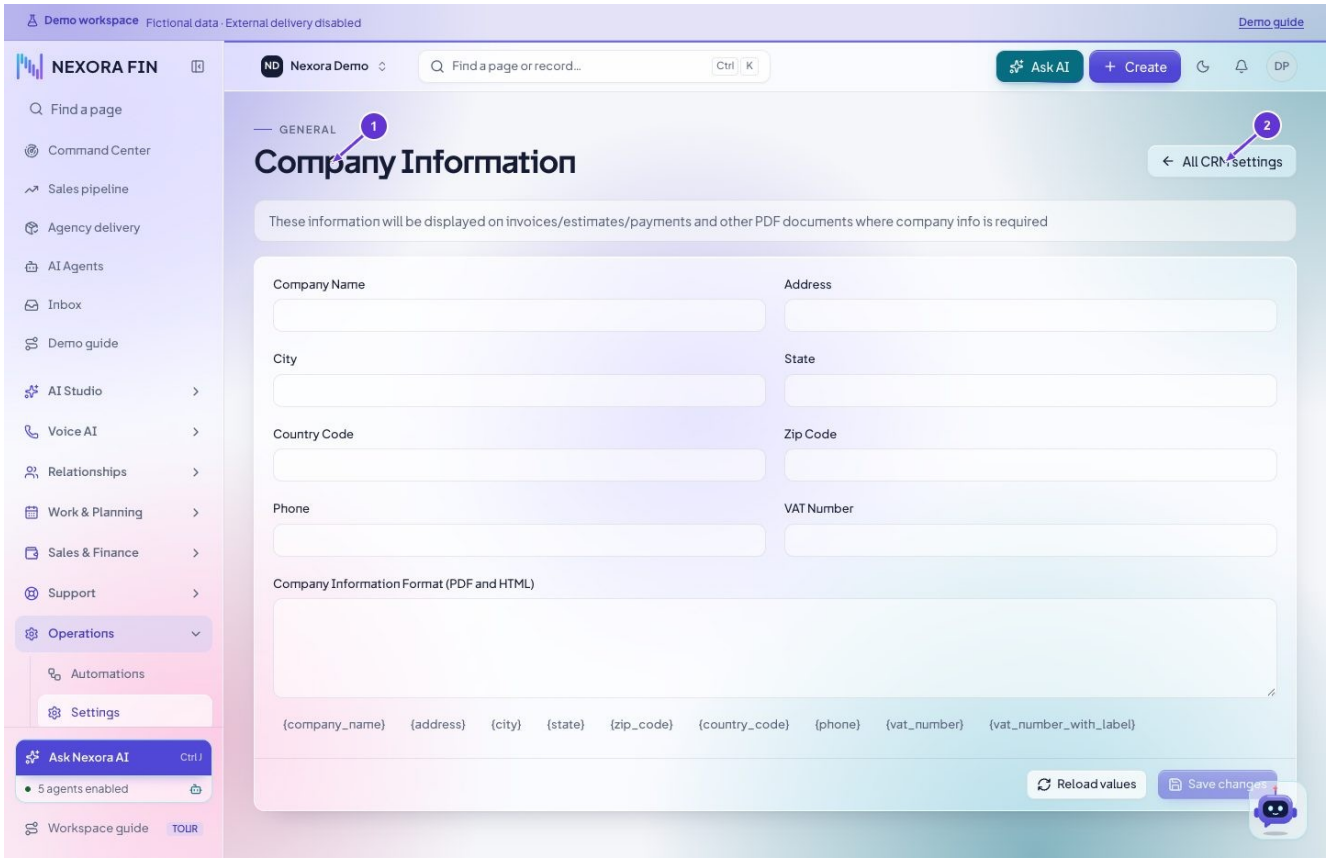


Figure 119 1 Company Information · 2 All CRM settings

Open in Nexora CRM

Localization

Choose the default language, timezone and date formats. Save and confirm the next calendar or document display.

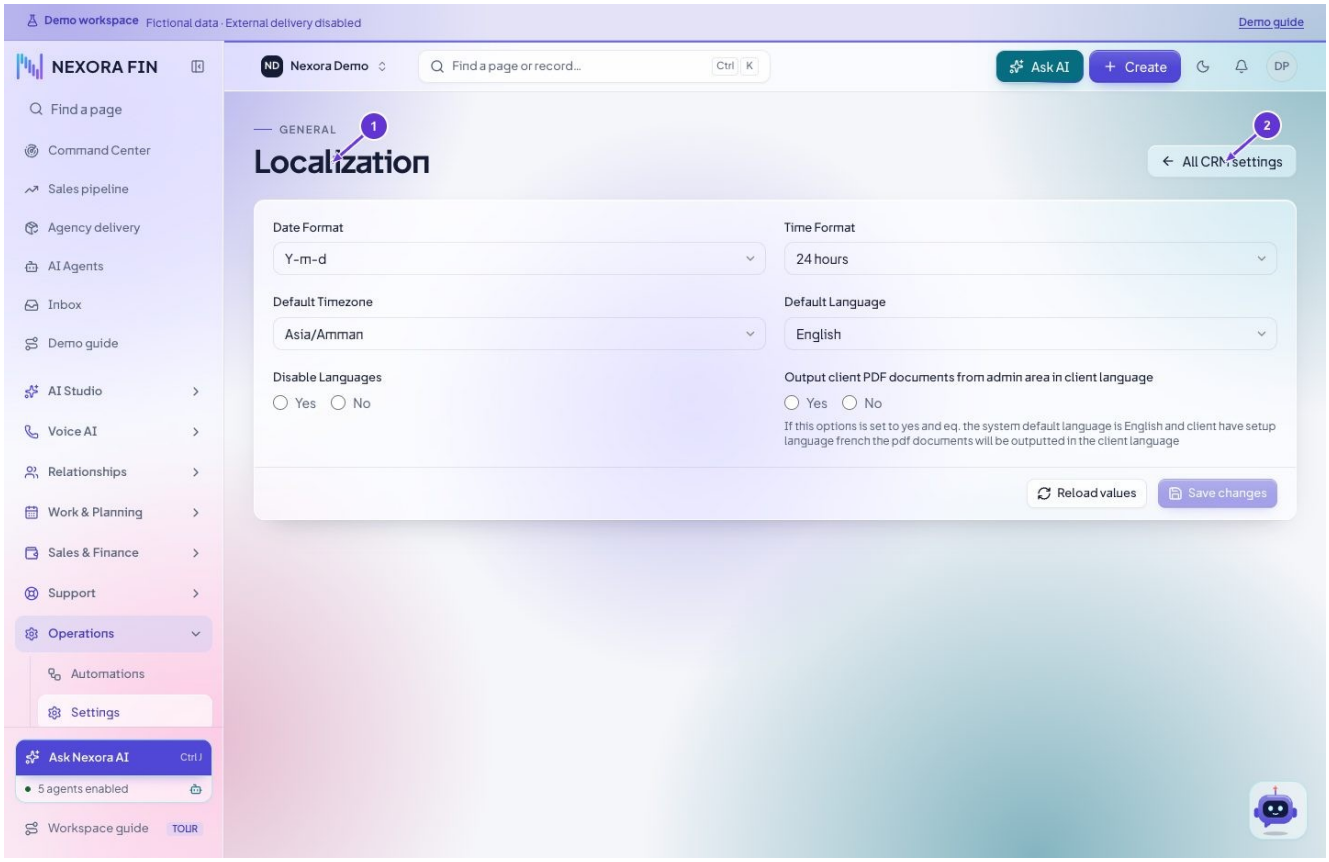


Figure 120 1 CRM settings · 2 All CRM settings

Open in Nexora CRM

Sales defaults

Review sales currency, tax and document preferences. Save and preview a new sales document to verify the defaults.

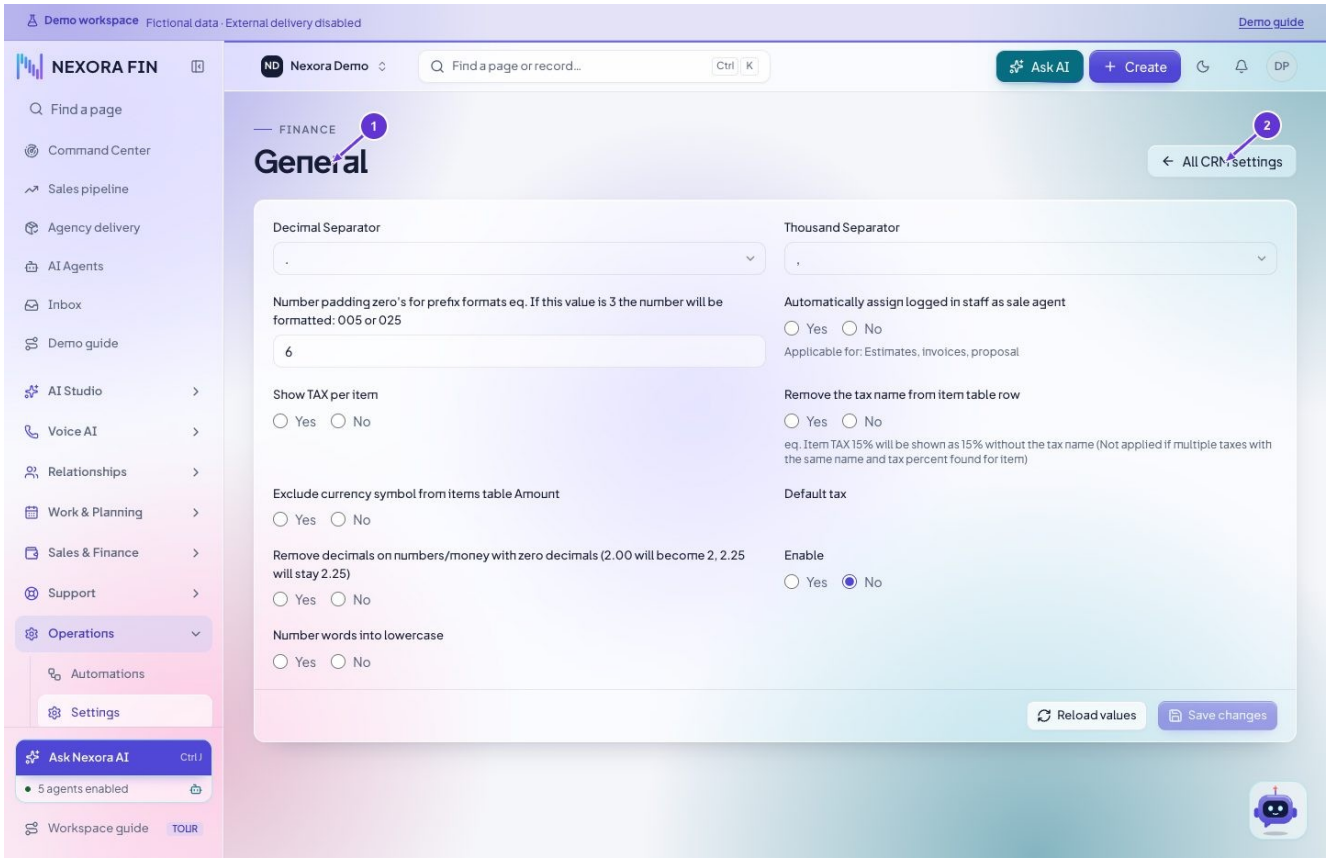


Figure 121 1 General · 2 All CRM settings

Open in Nexora CRM

Invoice defaults

Review invoice numbering, payment terms and display options. Save, then inspect a draft invoice.

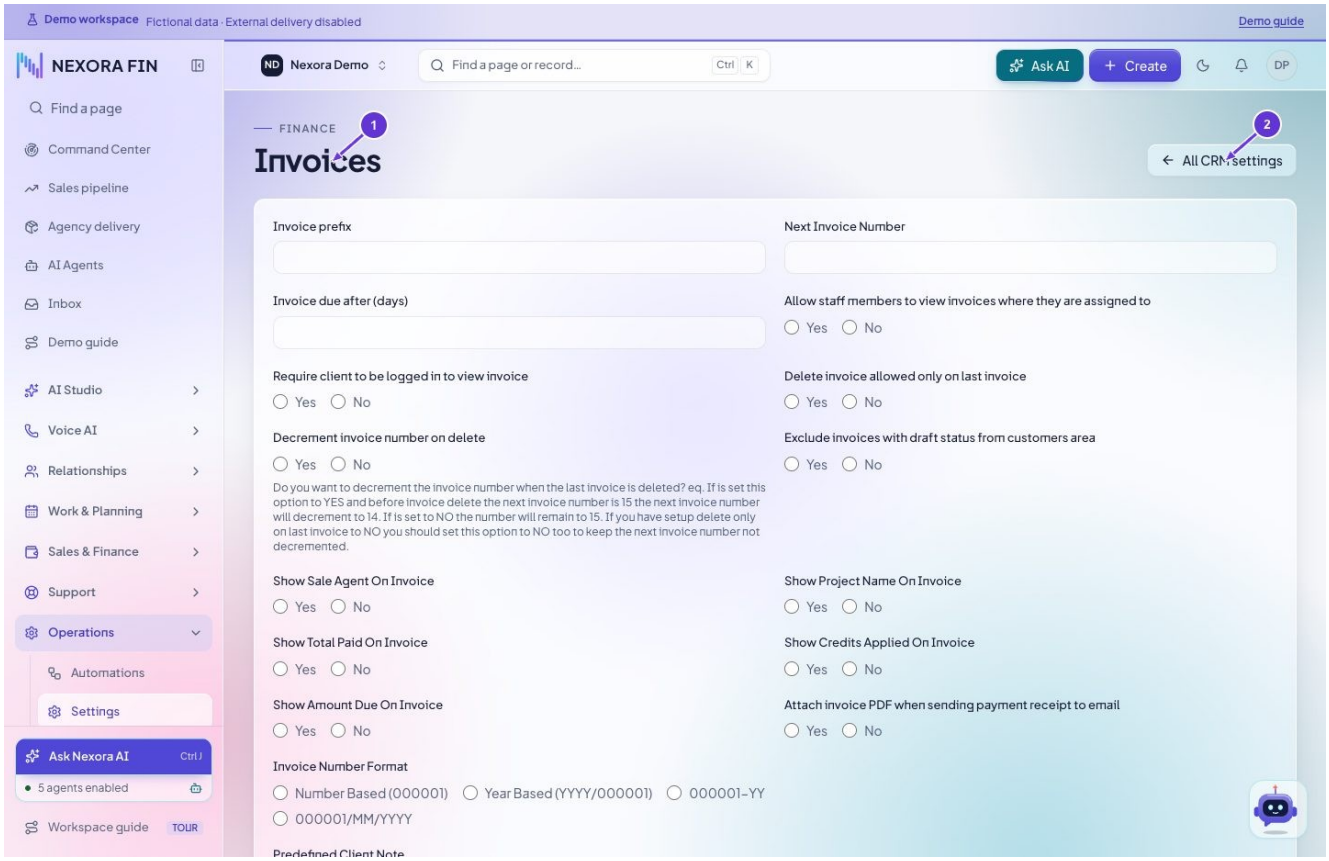


Figure 122 1 Invoices · 2 All CRM settings

Open in Nexora CRM

Proposal defaults

Review validity and proposal defaults, save, and verify in a new draft.

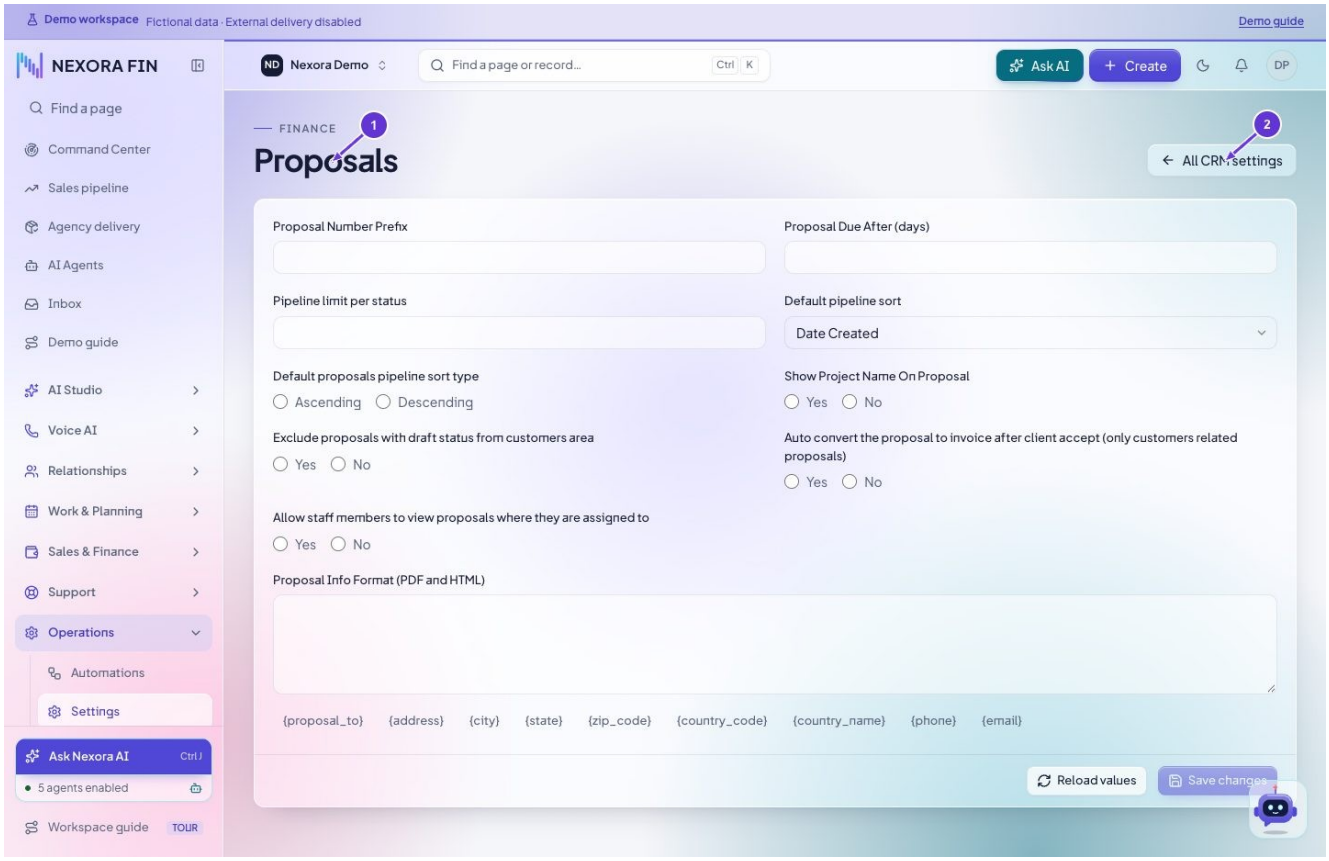


Figure 123 1 Proposals · 2 All CRM settings

Open in Nexora CRM

Estimate defaults

Review numbering, validity and other estimate defaults, save and verify a new estimate.

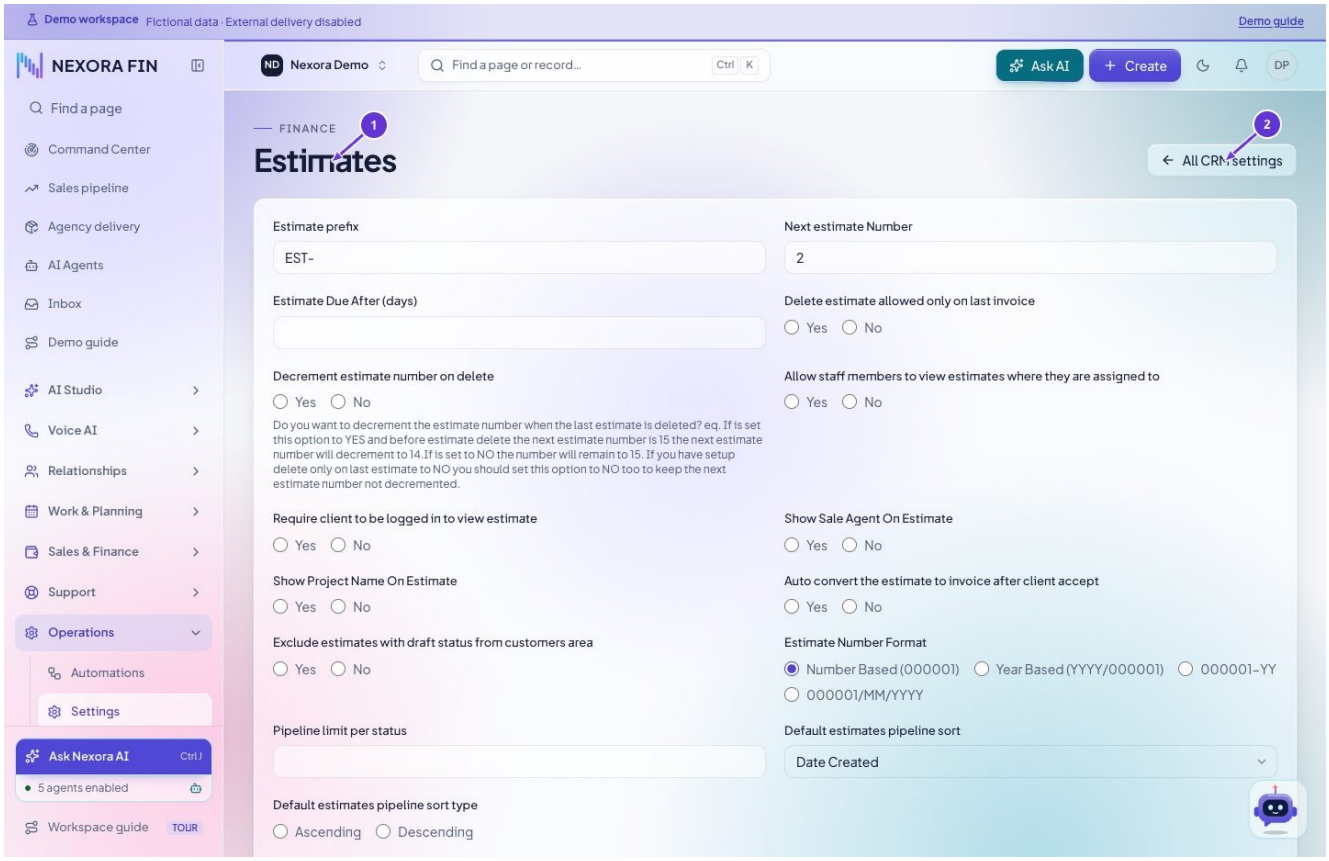


Figure 124 1 Estimates · 2 All CRM settings

Open in Nexora CRM

Credit note defaults

Review credit note numbering and document options. Save and inspect a draft before using the settings live.

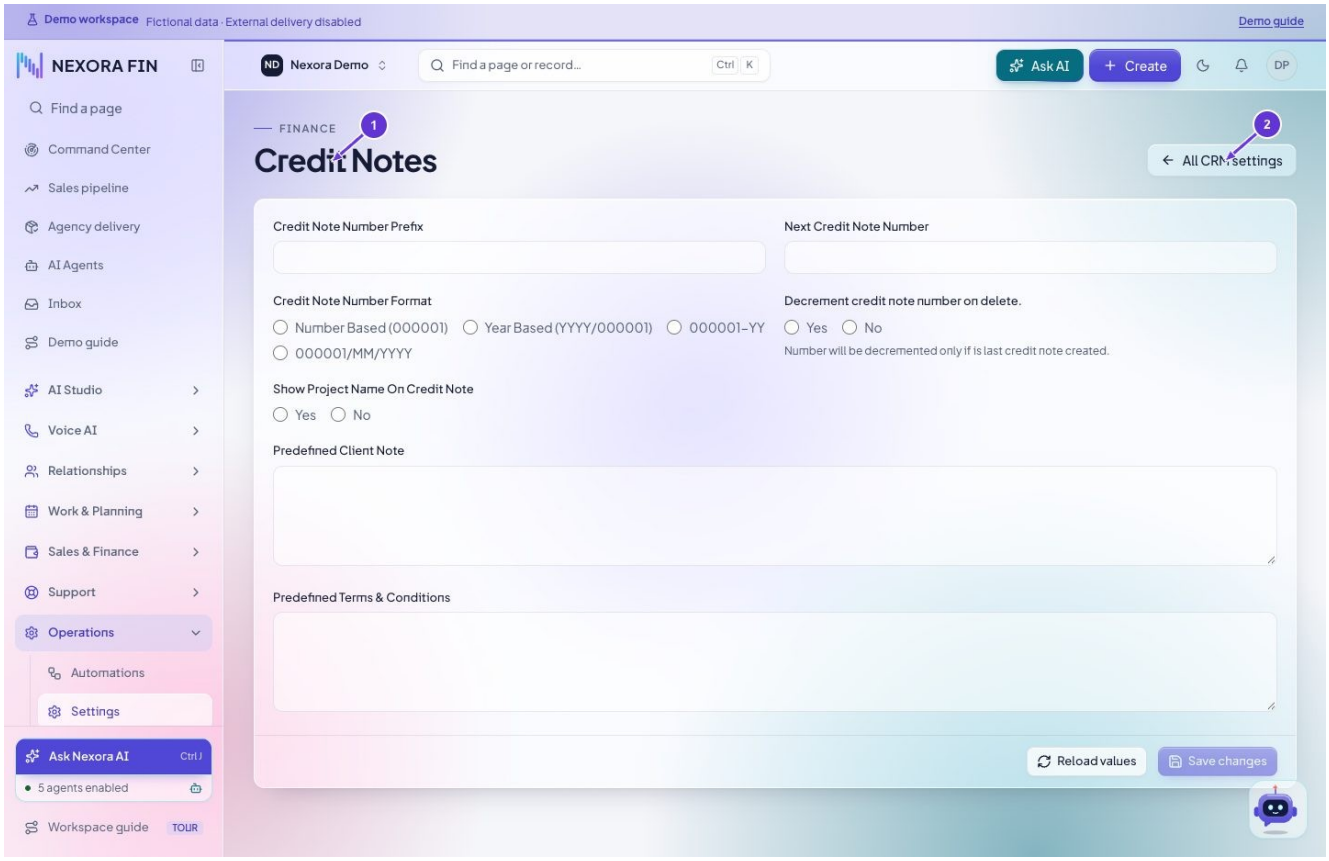


Figure 125 1 Credit Notes · 2 All CRM settings

Open in Nexora CRM

Subscription defaults

Review default subscription behavior and provider dependencies. Save and verify how the next draft appears.

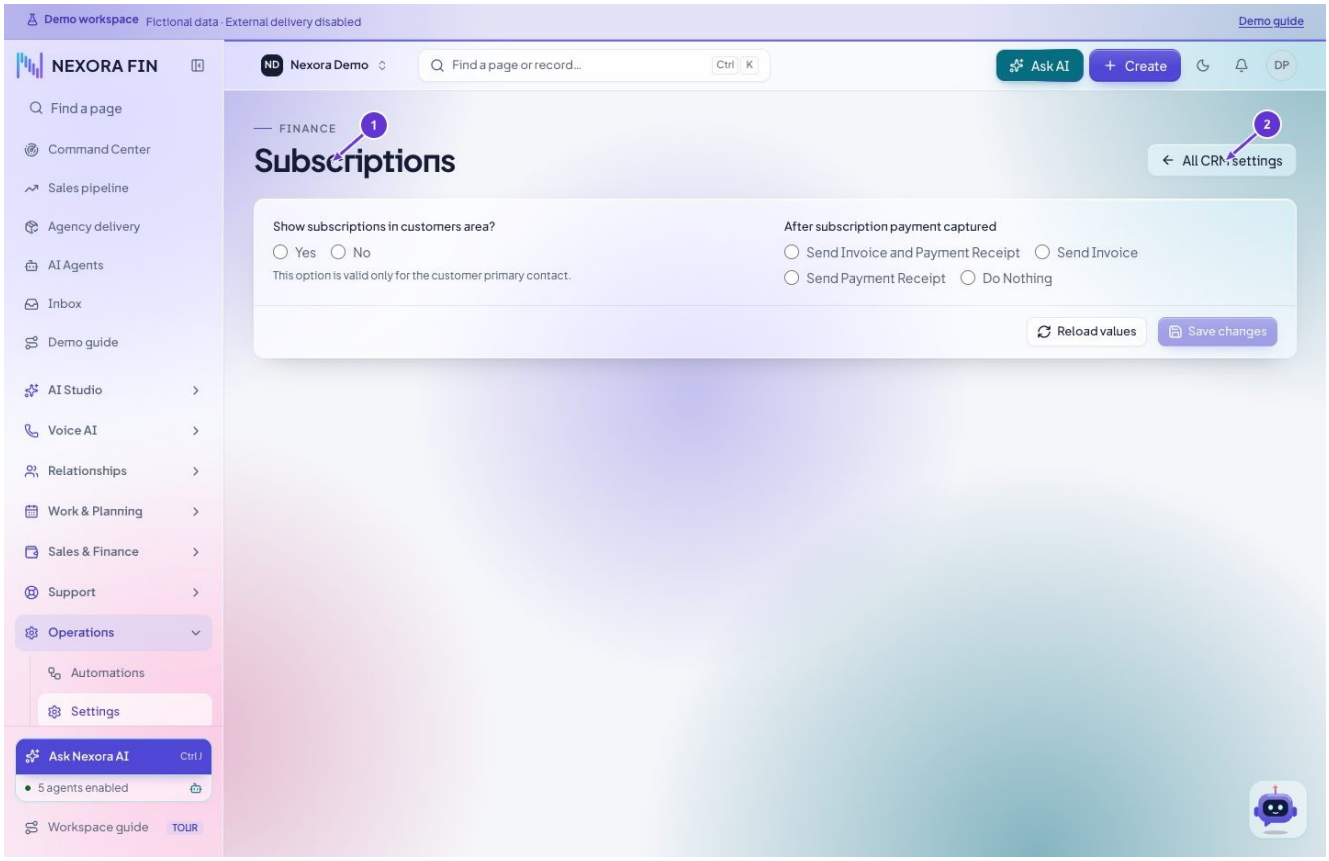


Figure 126 1 Subscriptions · 2 All CRM settings

Open in Nexora CRM

Payment gateways

Select the configured gateway, review mode and masked credentials, save and use the provider's appropriate verification flow.

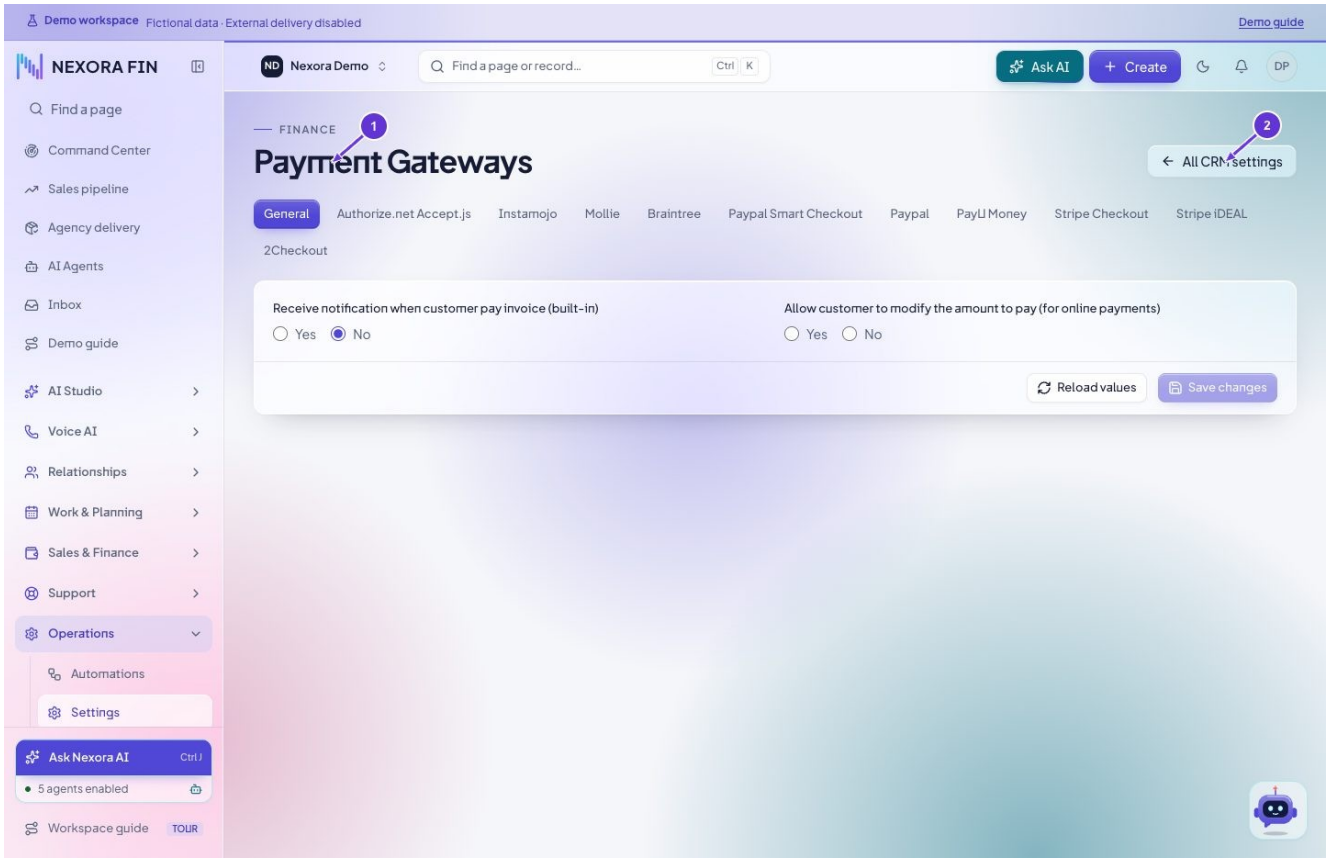


Figure 127 1 Payment Gateways · 2 All CRM settings

Open in Nexora CRM

Client portal settings

Review registration, client portal access and available features. Save and verify from an account with the intended client permissions.

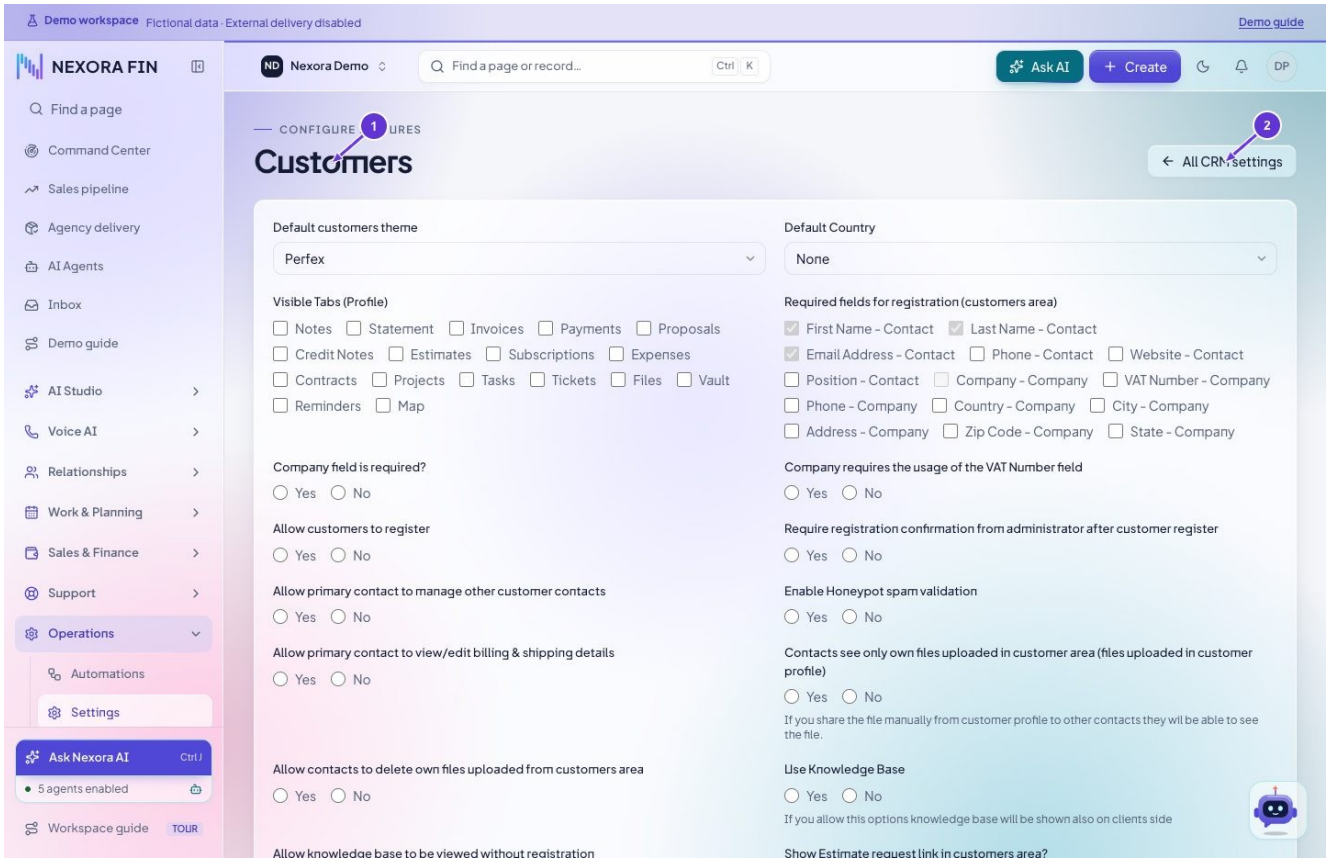


Figure 128 1 Customers · 2 All CRM settings

Open in Nexora CRM

Task defaults

Review task visibility, reminders and default behavior. Save and verify with a task in the relevant role.

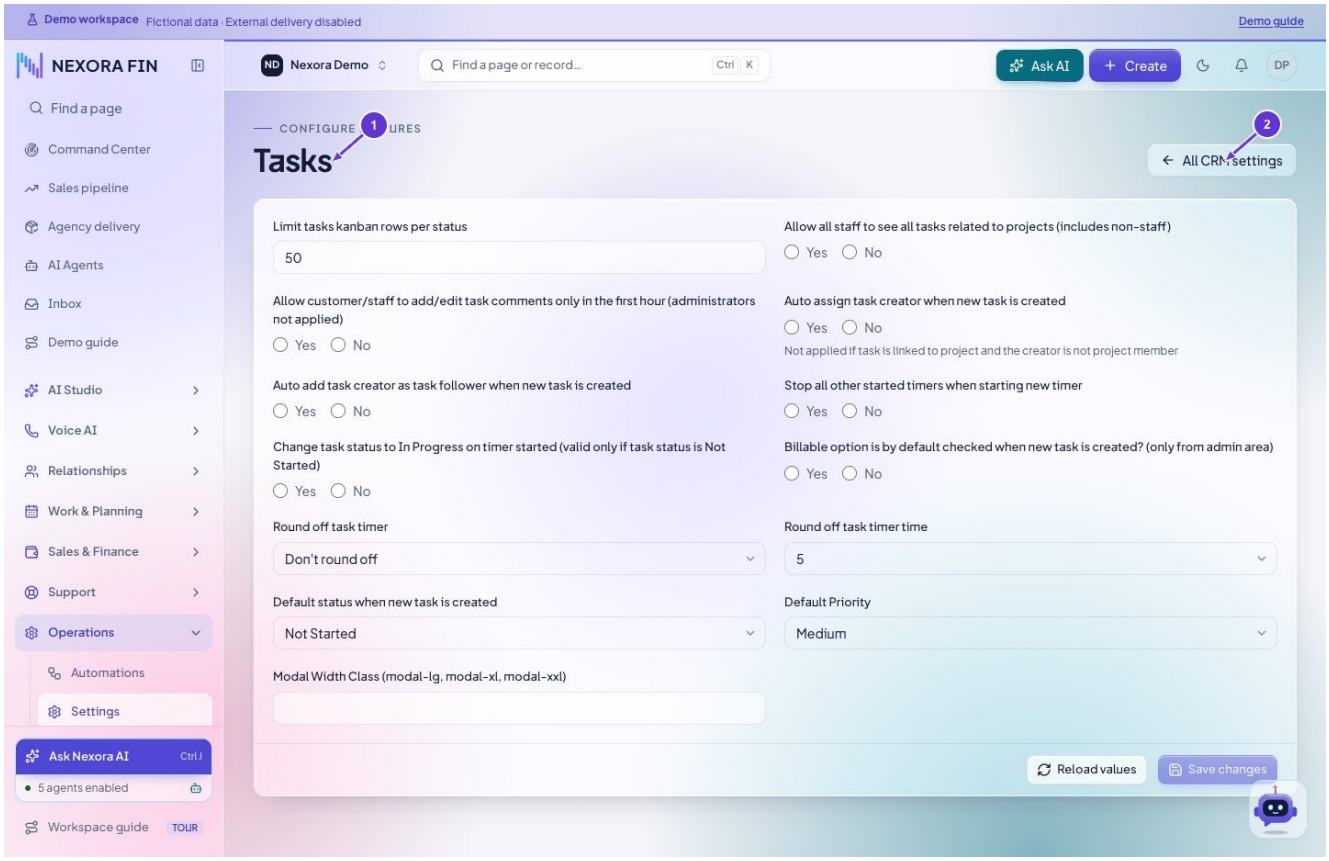


Figure 129 1 Tasks · 2 All CRM settings

Open in Nexora CRM

Ticket defaults

Review support behavior and ticket defaults. Save and verify a controlled ticket in the intended department.

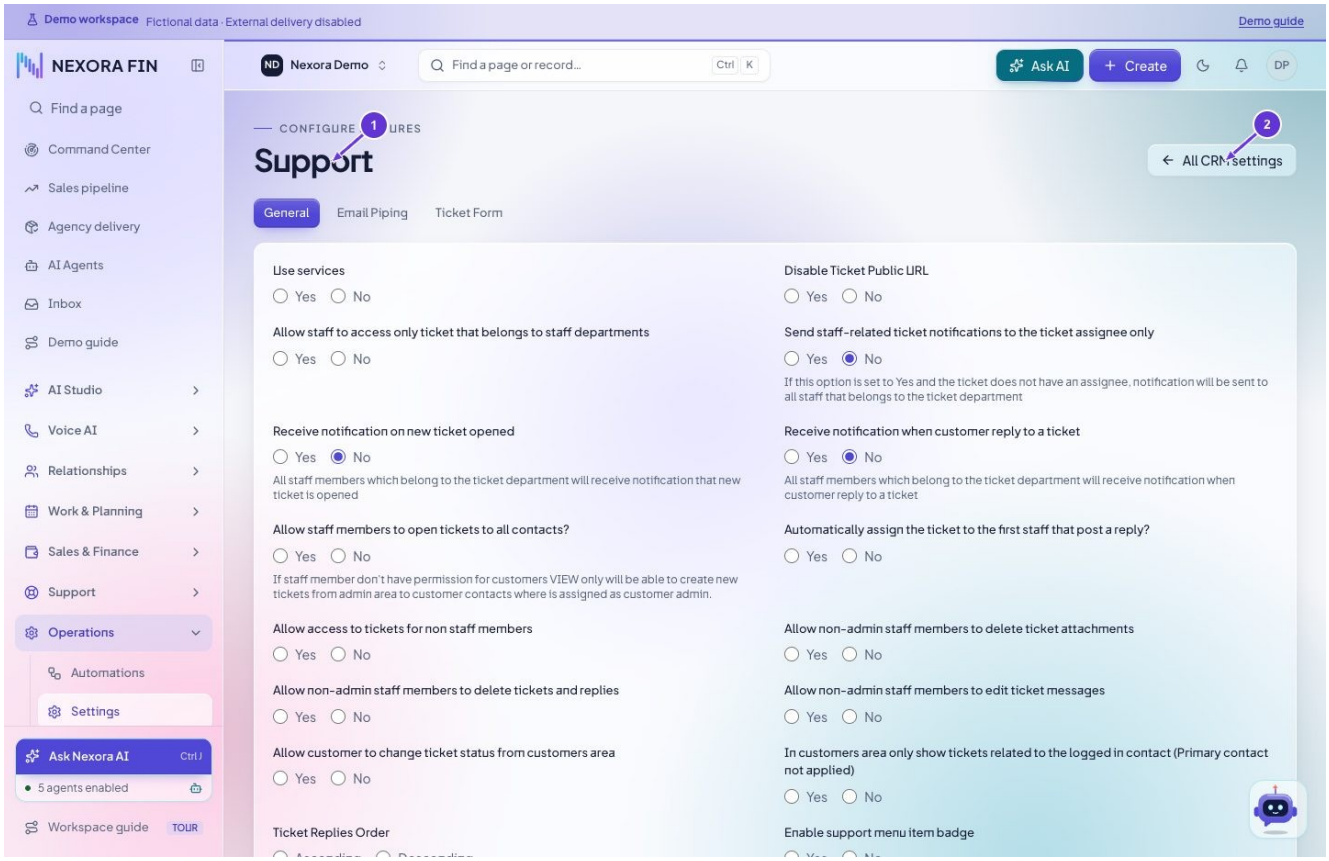


Figure 130 1 Support · 2 All CRM settings

Open in Nexora CRM

Lead defaults

Review lead assignment, status and related defaults. Save and verify with a controlled lead.

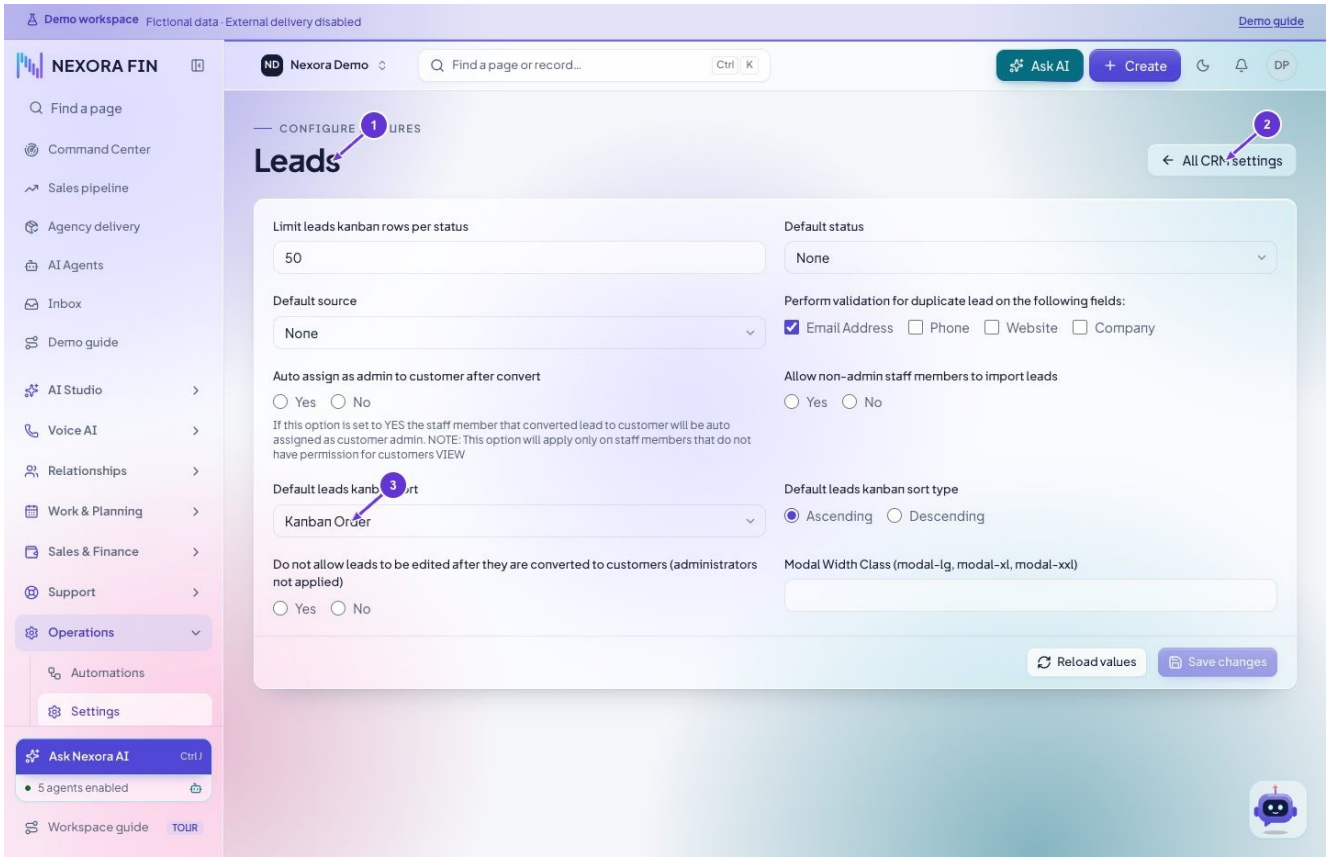


Figure 131 1 Leads · 2 All CRM settings · 3 Date Created Kanban Order Last Contact

Open in Nexora CRM

Google integration settings

Review the intended integration settings, save, then verify the connected feature using the appropriate account.

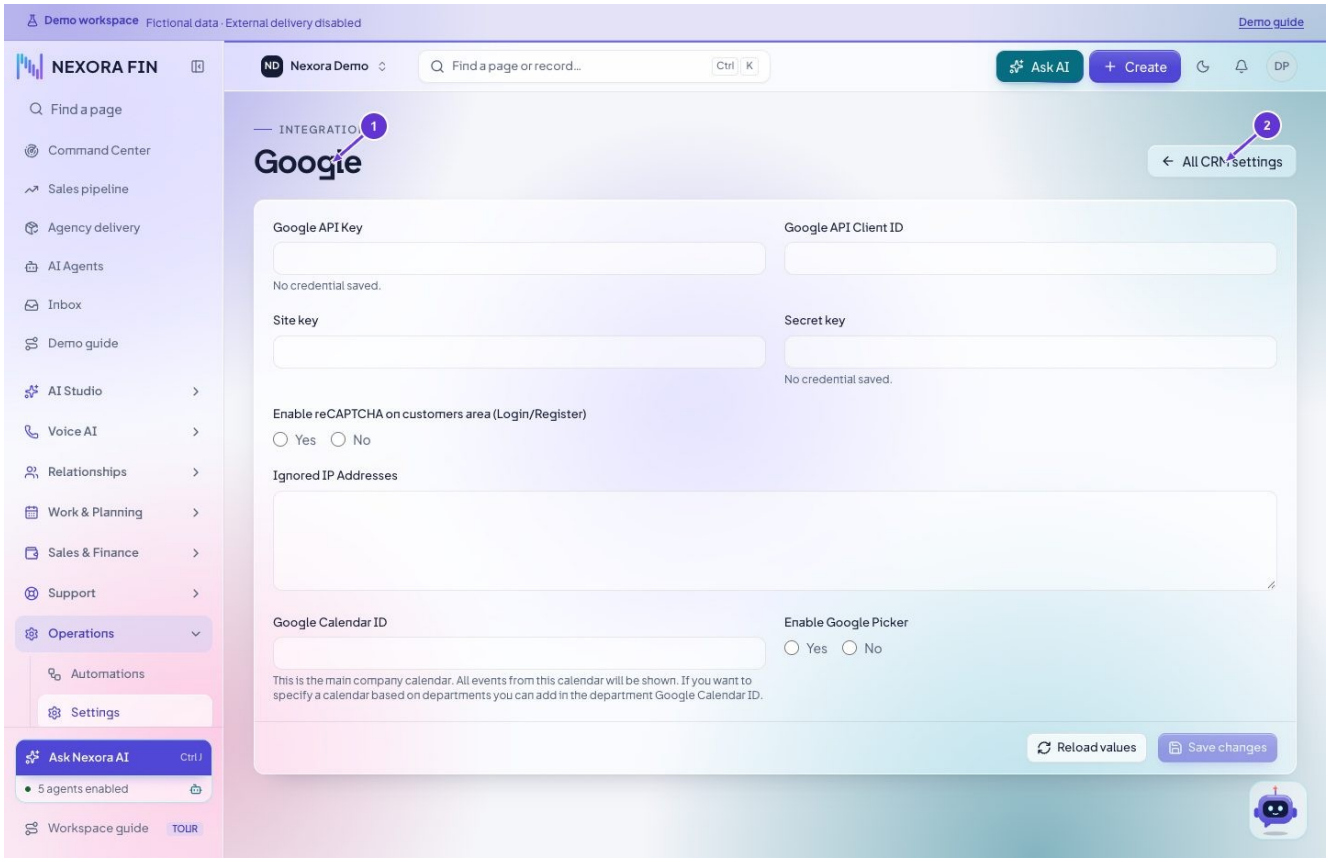


Figure 132 1 Google · 2 All CRM settings

Open in Nexora CRM

Pusher settings

Review the connection and notification options, save, then verify a permitted realtime notification.

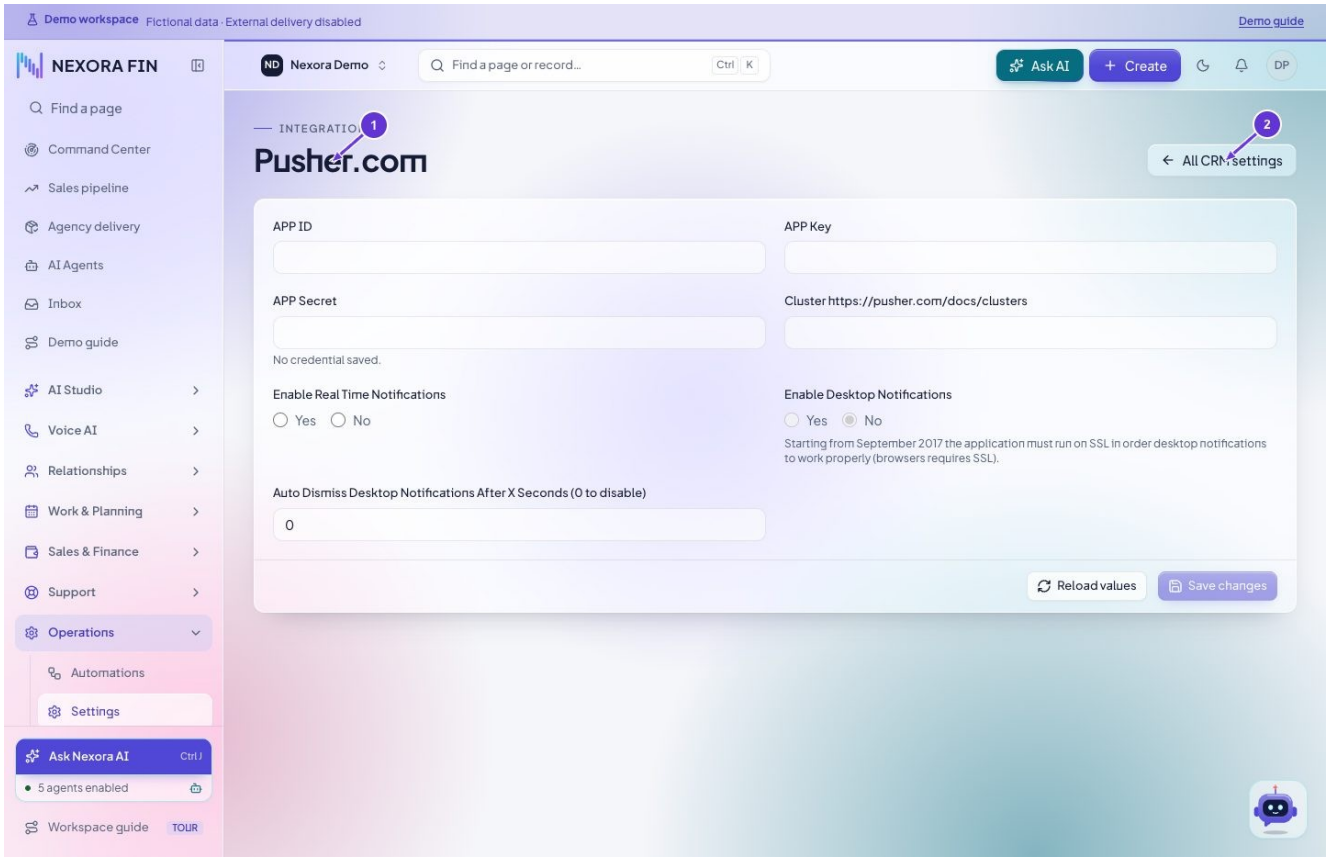


Figure 133 1 Pusher.com · 2 All CRM settings

Open in Nexora CRM

Core AI settings

Review the AI provider and allowed settings, save, and verify the current configuration using an actual assistant response.

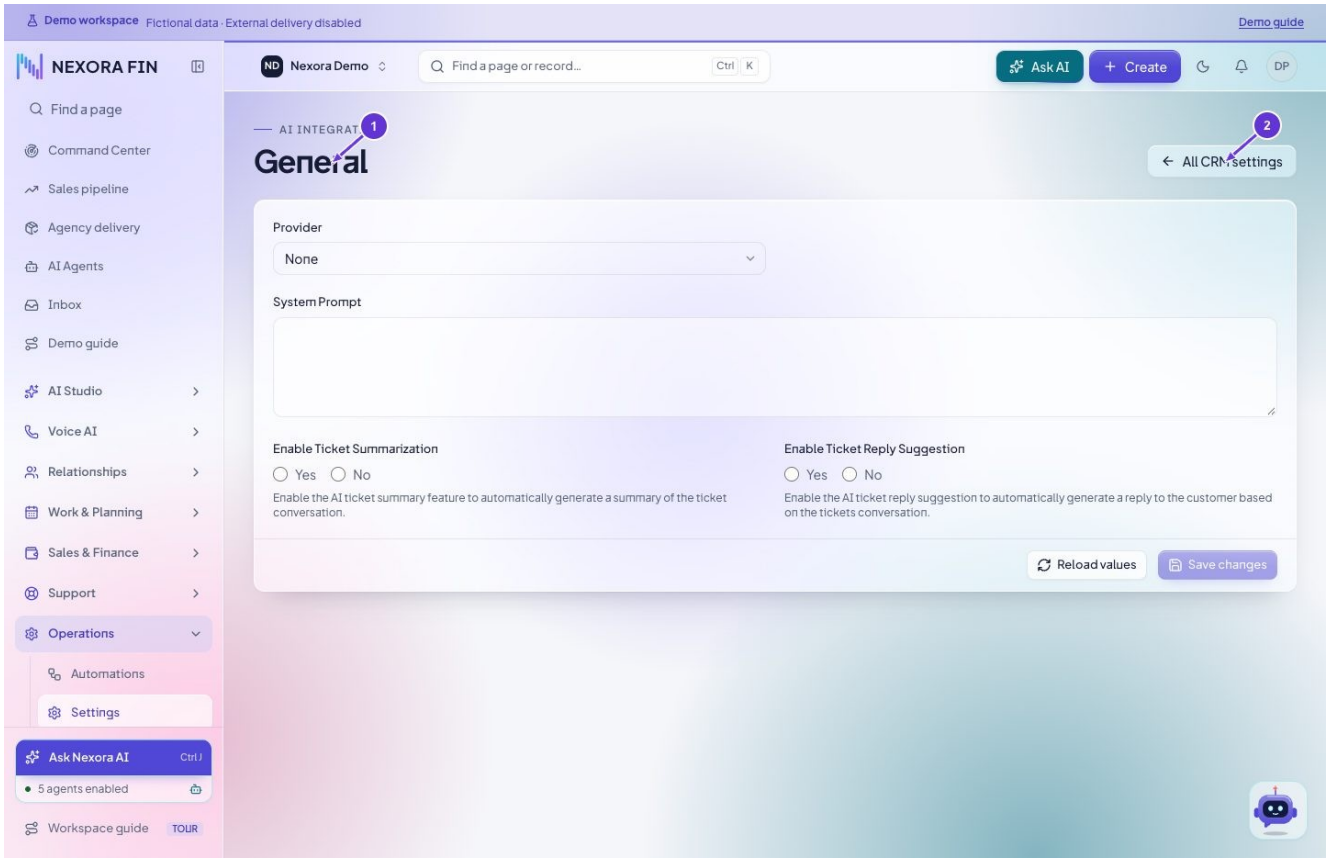


Figure 134 1 General · 2 All CRM settings

Open in Nexora CRM

Calendar defaults and colors

Open General for calendar behavior or Colors for event colors. Save and verify the Calendar display.

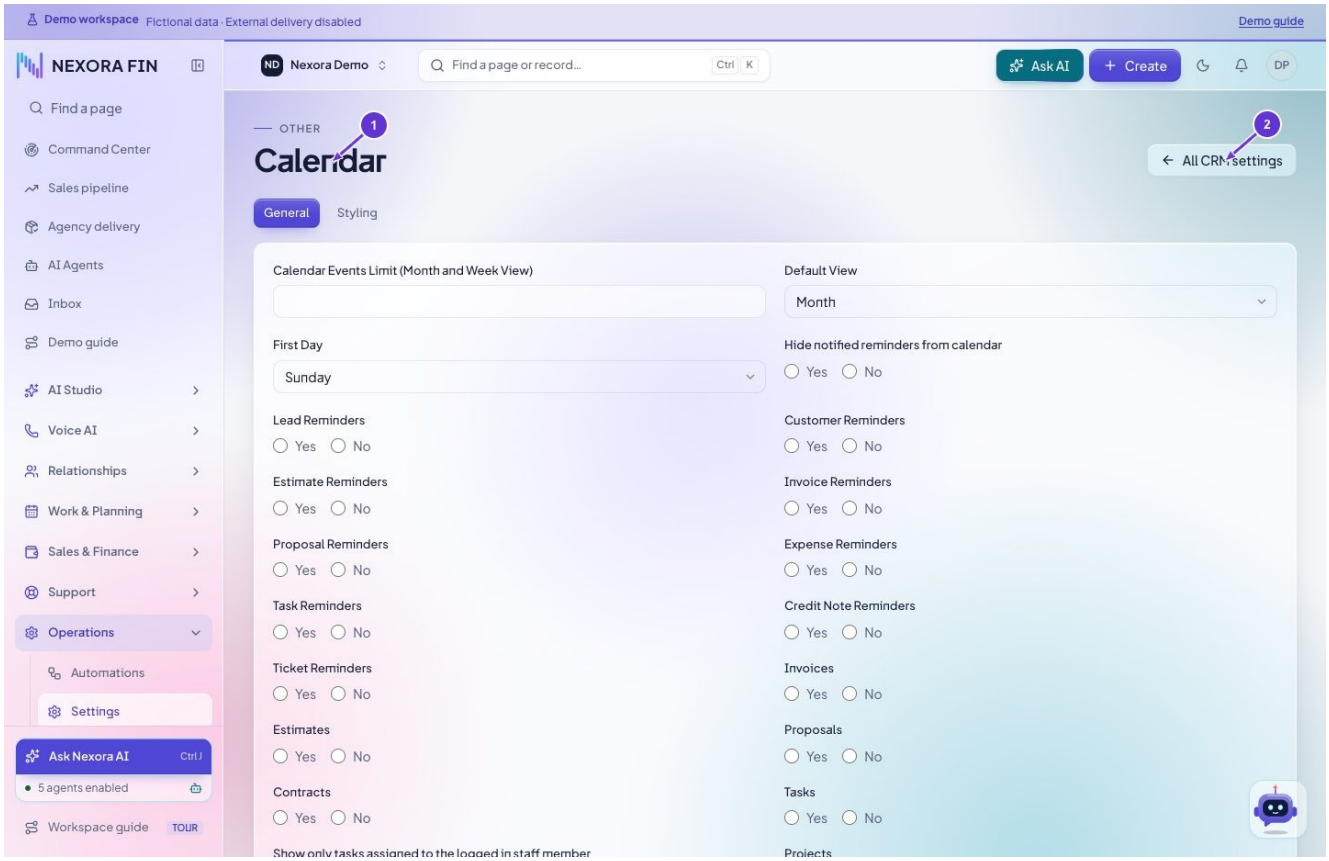


Figure 135 1 Calendar · 2 All CRM settings

Open in Nexora CRM

PDF settings

Choose General, Signature or Formats as needed. Save and open a representative PDF to verify the result.

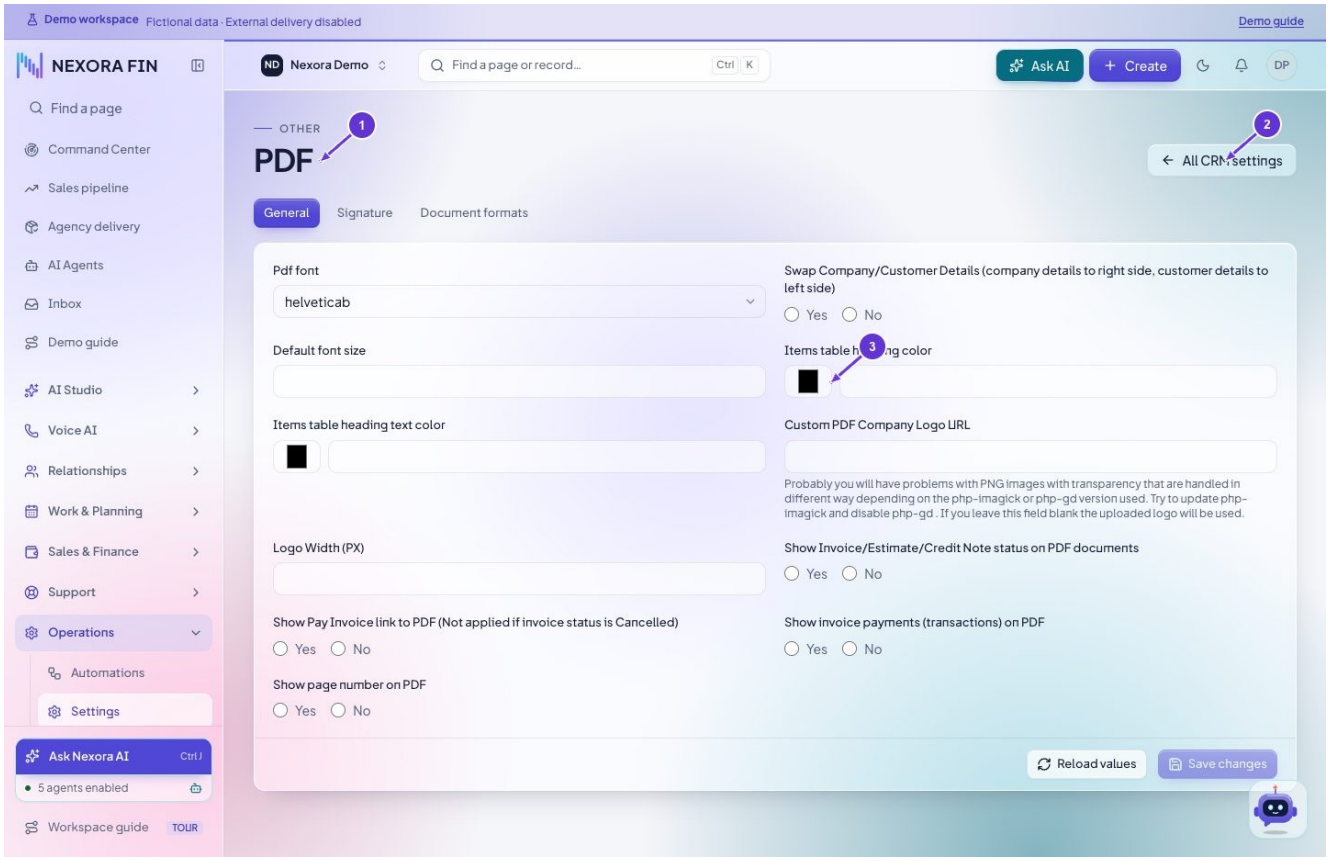


Figure 136 1 PDF · 2 All CRM settings · 3 Items table heading color color picker

Open in Nexora CRM

Electronic signature

Review the signature and agreement options, save, and verify a controlled document preview before requesting signatures.

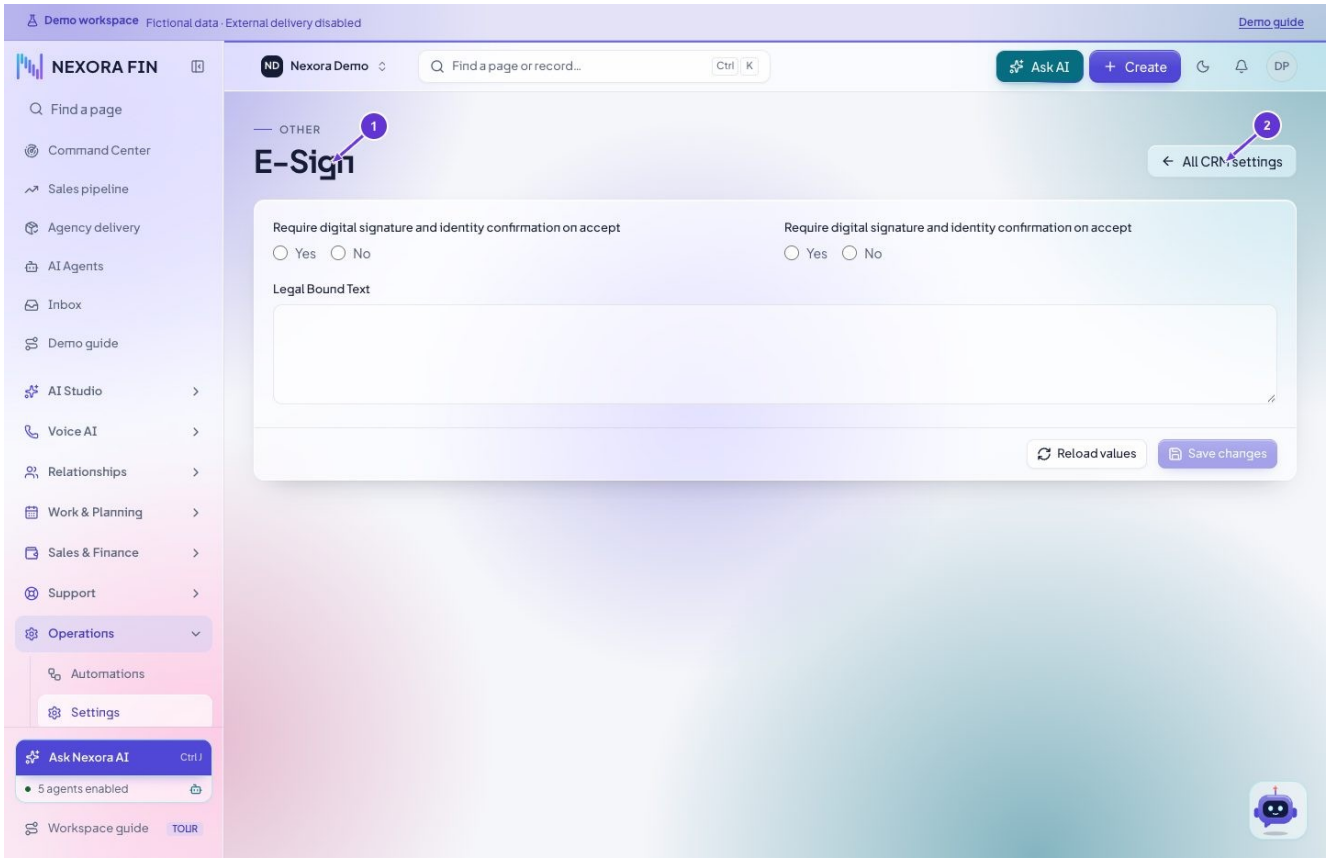


Figure 137 1 E-Sign · 2 All CRM settings

Open in Nexora CRM

Tag settings

Review available tags and how they are used in records. Save the intended change and verify tag selection on a record.

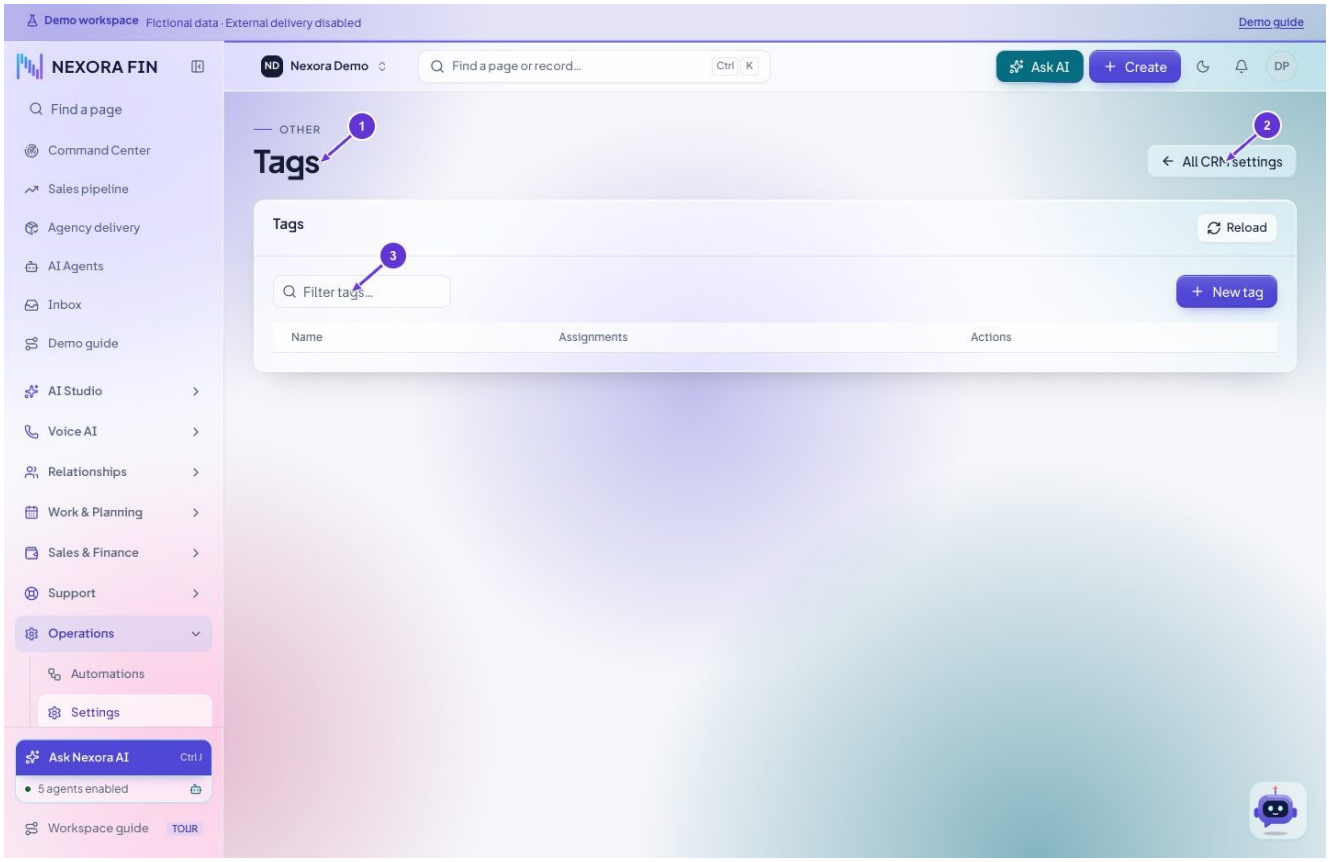


Figure 138 1 Tags · 2 All CRM settings · 3 Filter tags

Open in Nexora CRM

SMS settings

Review the enabled SMS provider and applicable triggers. Save and check the provider and destination before sending a controlled message.

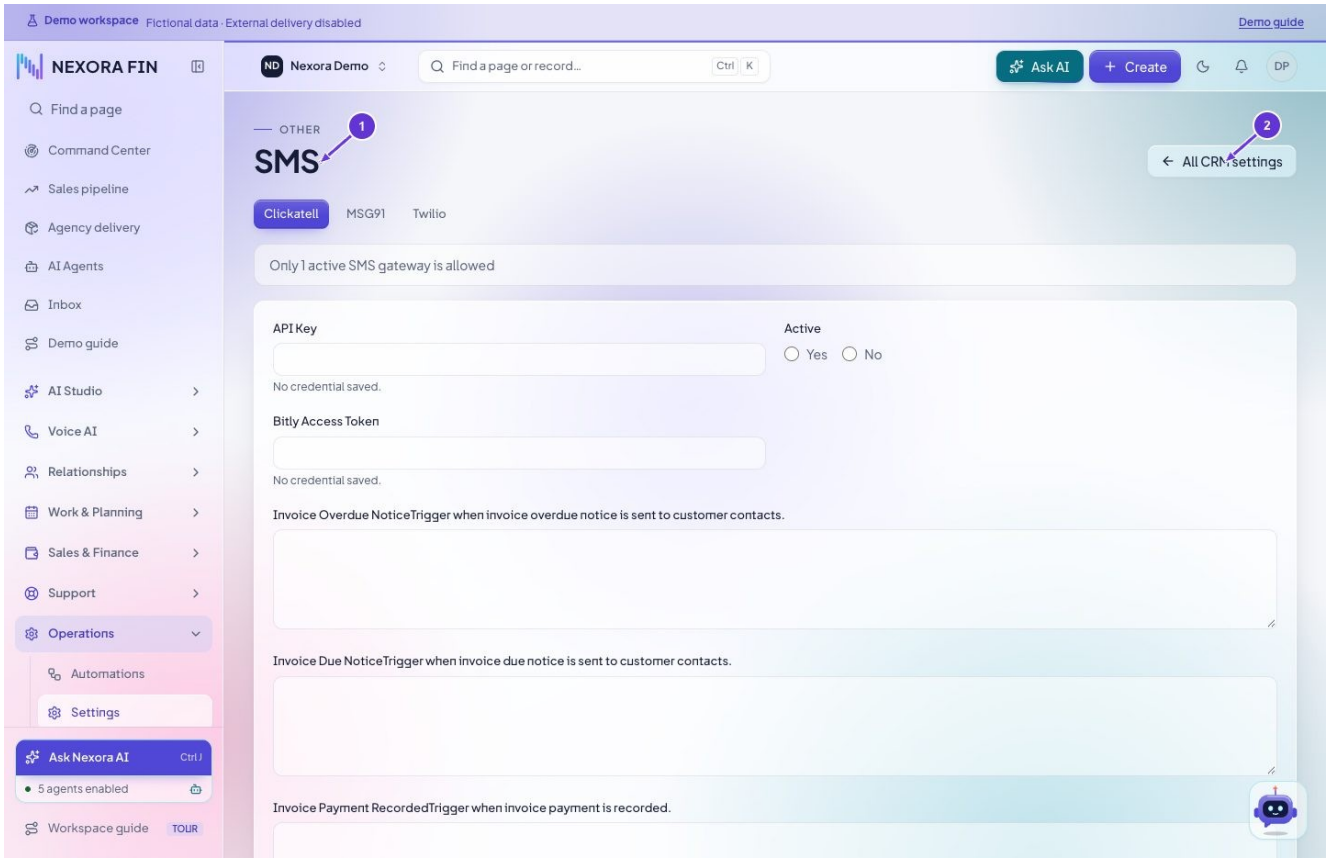


Figure 139 1 SMS · 2 All CRM settings

Open in Nexora CRM

Scheduled jobs

Review scheduled job options and the most recent execution. Verify the server scheduler and recorded results before assuming background jobs are running.

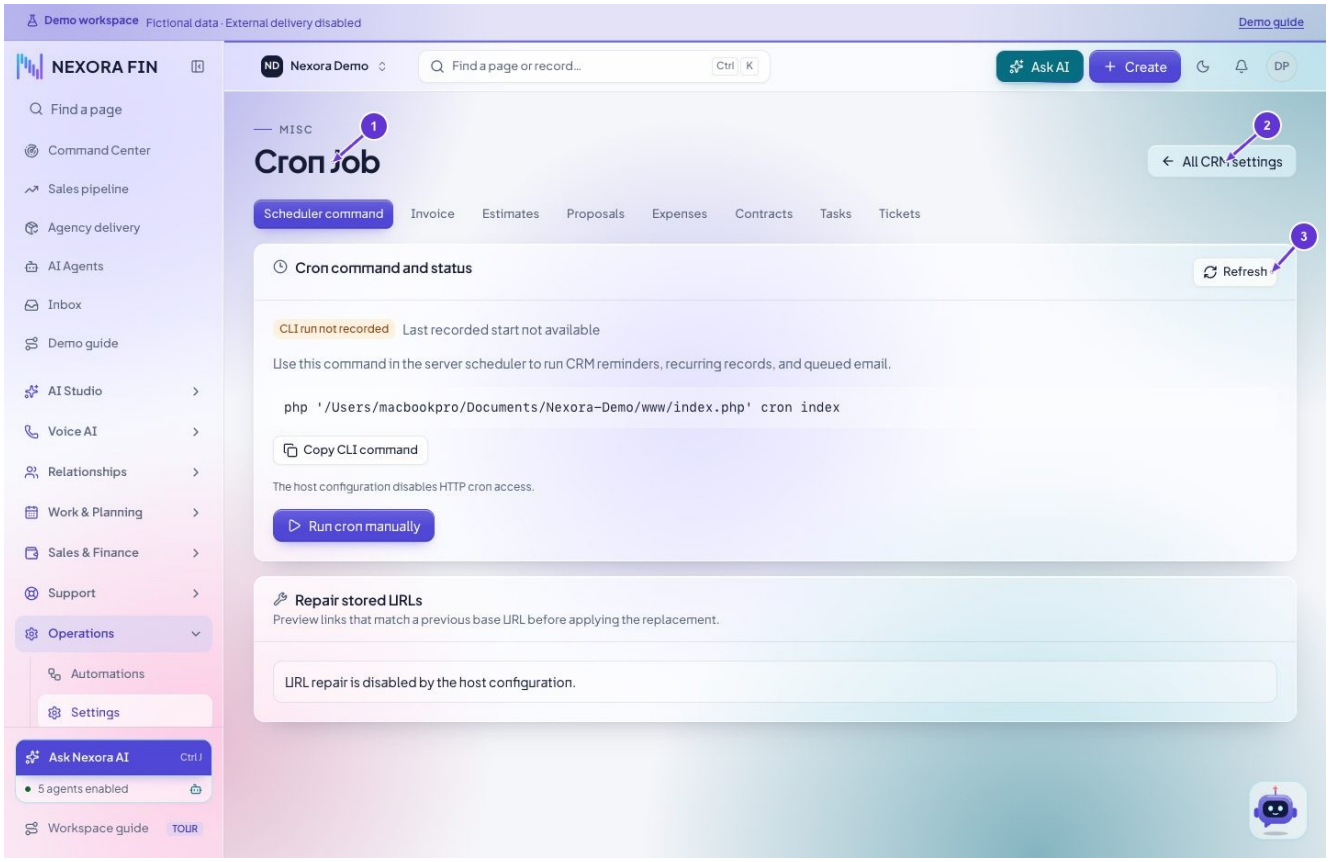


Figure 140 1 Cron Job · 2 All CRM settings · 3 Refresh

Open in Nexora CRM

Miscellaneous CRM settings

Find the named option in Miscellaneous, review its description and affected feature, save, and verify that feature.

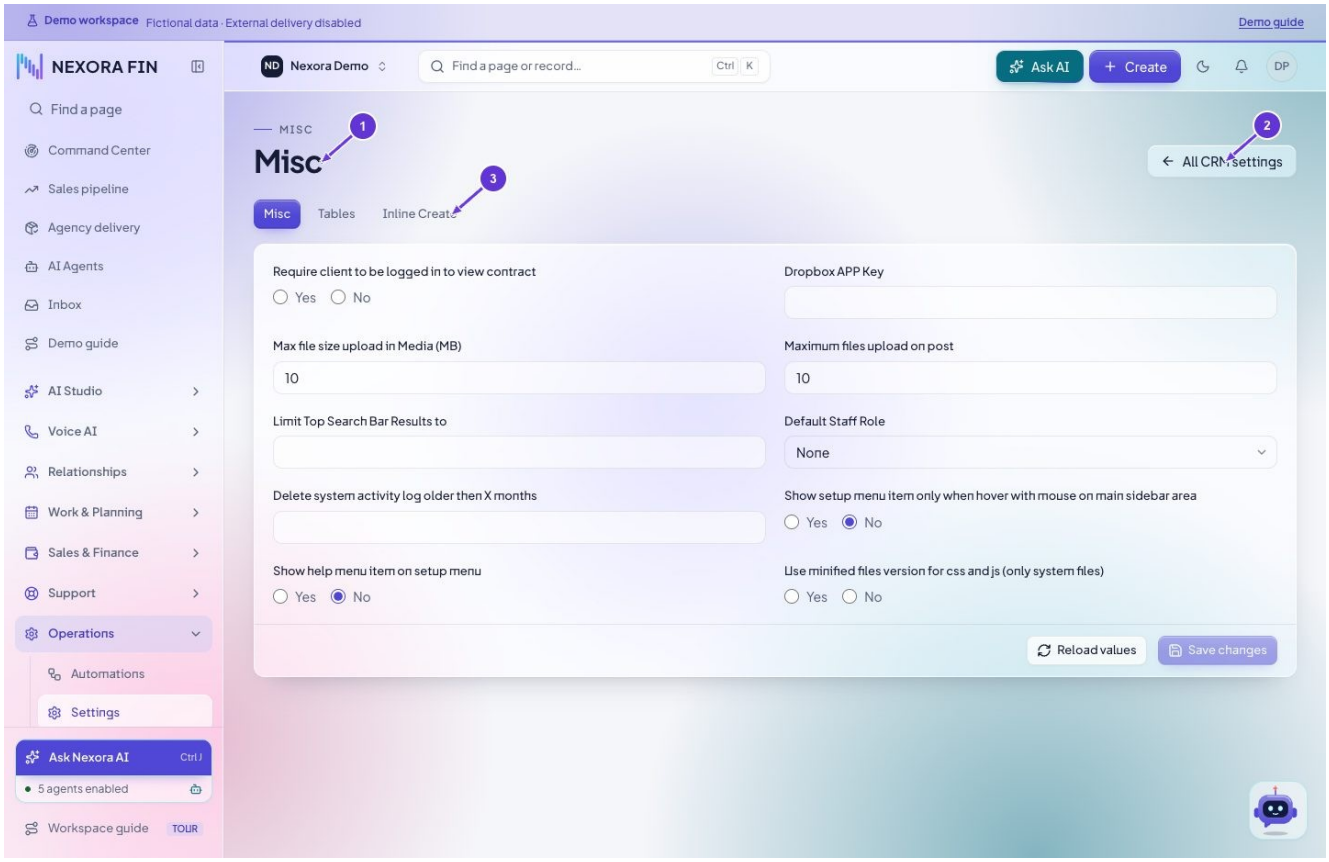


Figure 141 1 Misc · 2 All CRM settings · 3 Inline Create

Open in Nexora CRM