

Page 01 — Welcome and Scope

Purpose: How to use this manual

This page explains welcome and scope in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to how to use this manual. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to welcome and scope. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for how to use this manual. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For welcome and scope, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in welcome and scope is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 02 — Logging In

Purpose: Opening the workspace and signing in

This page explains logging in in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to opening the workspace and signing in. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to logging in. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for opening the workspace and signing in. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For logging in, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in logging in is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Important note

If your organization uses a separate sign-in page or single-sign-on method, follow the method provided to you. Never share your password or one-time verification code.

Page 03 — Dashboard Overview

Purpose: Understanding the main workspace

This page explains dashboard overview in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understanding the main workspace. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to dashboard overview. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding the main workspace. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For dashboard overview, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in dashboard overview is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 04 — Navigation Basics

Purpose: Menus, panels, filters, search and common buttons

This page explains navigation basics in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to menus, panels, filters, search and common buttons. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to navigation basics. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for menus, panels, filters, search and common buttons. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For navigation basics, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in navigation basics is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 05 — Your User Profile

Purpose: Profile details, preferences and account security

This page explains your user profile in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to profile details, preferences and account security. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to your user profile. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for profile details, preferences and account security. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For your user profile, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in your user profile is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 06 — Understanding Customer Records

Purpose: Contacts, conversations and customer history

This page explains understanding customer records in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to contacts, conversations and customer history. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to understanding customer records. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for contacts, conversations and customer history. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For understanding customer records, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in understanding customer records is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 07 — Adding a Contact Manually

Purpose: Creating a clean customer record

This page explains adding a contact manually in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to creating a clean customer record. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to adding a contact manually. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for creating a clean customer record. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For adding a contact manually, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in adding a contact manually is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 08 — Importing Contacts

Purpose: Preparing and importing a contact list

This page explains importing contacts in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to preparing and importing a contact list. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to importing contacts. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for preparing and importing a contact list. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For importing contacts, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in importing contacts is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Important note

Use a clean spreadsheet with one customer per row. Keep phone numbers in a consistent international format when required by the workspace.

Page 09 — Contact Field Mapping

Purpose: Matching spreadsheet columns to customer fields

This page explains contact field mapping in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to matching spreadsheet columns to customer fields. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to contact field mapping. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for matching spreadsheet columns to customer fields. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For contact field mapping, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in contact field mapping is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 10 — Custom Contact Information

Purpose: Using attributes, notes and additional details

This page explains custom contact information in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using attributes, notes and additional details. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to custom contact information. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using attributes, notes and additional details. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For custom contact information, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in custom contact information is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 11 — Contact Tags

Purpose: Creating useful customer segments through tags

This page explains contact tags in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to creating useful customer segments through tags. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to contact tags. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for creating useful customer segments through tags. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For contact tags, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in contact tags is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 12 — Contact Groups

Purpose: Building reusable customer lists

This page explains contact groups in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to building reusable customer lists. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to contact groups. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for building reusable customer lists. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For contact groups, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in contact groups is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 13 — Searching Contacts

Purpose: Finding the right customer quickly

This page explains searching contacts in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to finding the right customer quickly. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to searching contacts. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for finding the right customer quickly. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For searching contacts, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in searching contacts is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 14 — Filtering Contacts

Purpose: Using multiple filters to narrow a list

This page explains filtering contacts in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using multiple filters to narrow a list. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to filtering contacts. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using multiple filters to narrow a list. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For filtering contacts, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in filtering contacts is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 15 — Editing Contact Records

Purpose: Correcting and updating customer information

This page explains editing contact records in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to correcting and updating customer information. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to editing contact records. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for correcting and updating customer information. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For editing contact records, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in editing contact records is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 16 — Duplicate Contacts

Purpose: Recognizing and reducing duplicate records

This page explains duplicate contacts in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to recognizing and reducing duplicate records. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to duplicate contacts. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for recognizing and reducing duplicate records. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For duplicate contacts, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in duplicate contacts is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 17 — Exporting Contact Data

Purpose: Exporting customer information for permitted business use

This page explains exporting contact data in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to exporting customer information for permitted business use. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to exporting contact data. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for exporting customer information for permitted business use. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For exporting contact data, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in exporting contact data is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 18 — Customer Timeline

Purpose: Reading a customer's interaction history

This page explains customer timeline in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to reading a customer's interaction history. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to customer timeline. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for reading a customer's interaction history. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For customer timeline, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in customer timeline is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 19 — Unified Inbox Introduction

Purpose: Managing conversations from one place

This page explains unified inbox introduction in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to managing conversations from one place. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to unified inbox introduction. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for managing conversations from one place. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For unified inbox introduction, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in unified inbox introduction is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Important note

The unified inbox can bring conversations from supported channels into one working area. Your visible channels depend on the channels and permissions enabled for your workspace.

Page 20 — Inbox Layout

Purpose: Conversation list, customer panel and reply area

This page explains inbox layout in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to conversation list, customer panel and reply area. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to inbox layout. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for conversation list, customer panel and reply area. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For inbox layout, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in inbox layout is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 21 — Opening a Conversation

Purpose: Starting work on a customer chat

This page explains opening a conversation in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to starting work on a customer chat. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to opening a conversation. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for starting work on a customer chat. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For opening a conversation, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in opening a conversation is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 22 — Sending Text Messages

Purpose: Writing and sending normal replies

This page explains sending text messages in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to writing and sending normal replies. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to sending text messages. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for writing and sending normal replies. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For sending text messages, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in sending text messages is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 23 — Media Messages

Purpose: Sending images, documents and other supported media

This page explains media messages in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to sending images, documents and other supported media. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to media messages. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for sending images, documents and other supported media. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For media messages, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in media messages is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 24 — Message Actions

Purpose: Replying, forwarding, editing and reacting where available

This page explains message actions in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to replying, forwarding, editing and reacting where available. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to message actions. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for replying, forwarding, editing and reacting where available. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For message actions, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in message actions is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 25 — Conversation Search

Purpose: Finding an old message or customer conversation

This page explains conversation search in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to finding an old message or customer conversation. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to conversation search. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for finding an old message or customer conversation. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For conversation search, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in conversation search is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 26 — Pinning and Starring Chats

Purpose: Keeping important conversations easy to find

This page explains pinning and starring chats in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to keeping important conversations easy to find. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to pinning and starring chats. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for keeping important conversations easy to find. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For pinning and starring chats, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in pinning and starring chats is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 27 — Archiving Conversations

Purpose: Cleaning the active inbox without losing history

This page explains archiving conversations in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to cleaning the active inbox without losing history. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to archiving conversations. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for cleaning the active inbox without losing history. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For archiving conversations, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in archiving conversations is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 28 — Internal Notes

Purpose: Recording information for your team

This page explains internal notes in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to recording information for your team. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to internal notes. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for recording information for your team. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For internal notes, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in internal notes is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 29 — Mentions and Team Collaboration

Purpose: Working with colleagues inside conversations

This page explains mentions and team collaboration in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to working with colleagues inside conversations. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to mentions and team collaboration. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for working with colleagues inside conversations. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For mentions and team collaboration, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in mentions and team collaboration is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 30 — Conversation Assignment

Purpose: Understanding ownership and handover

This page explains conversation assignment in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understand ownership and handover. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to conversation assignment. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding ownership and handover. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For conversation assignment, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in conversation assignment is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 31 — Human Handover

Purpose: Taking control when automation needs a person

This page explains human handover in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to taking control when automation needs a person. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to human handover. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for taking control when automation needs a person. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For human handover, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in human handover is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 32 — Snoozing and Follow-Up

Purpose: Creating a reliable follow-up routine

This page explains snoozing and follow-up in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to creating a reliable follow-up routine. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to snoozing and follow-up. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for creating a reliable follow-up routine. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For snoozing and follow-up, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in snoozing and follow-up is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 33 — Saved Replies

Purpose: Using prepared answers consistently

This page explains saved replies in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using prepared answers consistently. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to saved replies. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using prepared answers consistently. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For saved replies, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in saved replies is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 34 — Creating Useful Reply Templates

Purpose: Designing concise reusable answers

This page explains creating useful reply templates in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to designing concise reusable answers. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to creating useful reply templates. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for designing concise reusable answers. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For creating useful reply templates, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in creating useful reply templates is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 35 — Quick Reply Workflow

Purpose: Speeding up repetitive customer questions

This page explains quick reply workflow in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to speeding up repetitive customer questions. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to quick reply workflow. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for speeding up repetitive customer questions. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For quick reply workflow, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in quick reply workflow is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 36 — Auto-Reply Basics

Purpose: Understanding automatic responses

This page explains auto-reply basics in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understanding automatic responses. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to auto-reply basics. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding automatic responses. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For auto-reply basics, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in auto-reply basics is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 37 — Keyword Auto-Reply

Purpose: Responding to customer keywords

This page explains keyword auto-reply in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to responding to customer keywords. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to keyword auto-reply. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for responding to customer keywords. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For keyword auto-reply, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in keyword auto-reply is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 38 — Exact, Fuzzy and Pattern Matching

Purpose: Choosing the right trigger behavior

This page explains exact, fuzzy and pattern matching in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to choosing the right trigger behavior. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to exact, fuzzy and pattern matching. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for choosing the right trigger behavior. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For exact, fuzzy and pattern matching, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in exact, fuzzy and pattern matching is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 39 — Welcome Messages

Purpose: Handling first-time or new conversations

This page explains welcome messages in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to handling first-time or new conversations. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to welcome messages. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for handling first-time or new conversations. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For welcome messages, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in welcome messages is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 40 — Multi-Language Replies

Purpose: Managing customers in different languages

This page explains multi-language replies in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to managing customers in different languages. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to multi-language replies. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for managing customers in different languages. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For multi-language replies, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in multi-language replies is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 41 — Auto-Reply Testing

Purpose: Checking responses before relying on them

This page explains auto-reply testing in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to checking responses before relying on them. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to auto-reply testing. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for checking responses before relying on them. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For auto-reply testing, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in auto-reply testing is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 42 — Broadcast Basics

Purpose: Understanding one-to-many communication

This page explains broadcast basics in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understanding one-to-many communication. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to broadcast basics. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding one-to-many communication. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For broadcast basics, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in broadcast basics is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Important note

A broadcast is a one-to-many communication. Treat it as a customer communication campaign, not as a substitute for a personal conversation.

Page 43 — Preparing a Broadcast Audience

Purpose: Selecting the correct customers

This page explains preparing a broadcast audience in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to selecting the correct customers. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to preparing a broadcast audience. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for selecting the correct customers. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For preparing a broadcast audience, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in preparing a broadcast audience is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 44 — Creating a Text Broadcast

Purpose: Sending a simple message to a segment

This page explains creating a text broadcast in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to sending a simple message to a segment. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to creating a text broadcast. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for sending a simple message to a segment. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For creating a text broadcast, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in creating a text broadcast is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 45 — Media Broadcasts

Purpose: Sending supported media to a selected audience

This page explains media broadcasts in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to sending supported media to a selected audience. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to media broadcasts. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for sending supported media to a selected audience. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For media broadcasts, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in media broadcasts is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 46 — Scheduled Broadcasts

Purpose: Planning messages for later

This page explains scheduled broadcasts in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to planning messages for later. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to scheduled broadcasts. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for planning messages for later. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For scheduled broadcasts, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in scheduled broadcasts is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 47 — Recurring Messages

Purpose: Using repeat schedules responsibly

This page explains recurring messages in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using repeat schedules responsibly. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to recurring messages. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using repeat schedules responsibly. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For recurring messages, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in recurring messages is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 48 — Campaign Status and Monitoring

Purpose: Reading delivery and recipient states

This page explains campaign status and monitoring in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to reading delivery and recipient states. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to campaign status and monitoring. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for reading delivery and recipient states. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For campaign status and monitoring, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in campaign status and monitoring is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 49 — Broadcast Follow-Up

Purpose: Handling replies after a campaign

This page explains broadcast follow-up in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to handling replies after a campaign. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to broadcast follow-up. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for handling replies after a campaign. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For broadcast follow-up, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in broadcast follow-up is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 50 — Broadcast Safety and Customer Respect

Purpose: Avoiding poor-quality outreach

This page explains broadcast safety and customer respect in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to avoiding poor-quality outreach. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to broadcast safety and customer respect. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for avoiding poor-quality outreach. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For broadcast safety and customer respect, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in broadcast safety and customer respect is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 51 — Templates Overview

Purpose: Understanding reusable message templates

This page explains templates overview in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understanding reusable message templates. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to templates overview. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding reusable message templates. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For templates overview, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in templates overview is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 52 — Template Variables

Purpose: Personalizing messages with customer data

This page explains template variables in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to personalizing messages with customer data. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to template variables. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for personalizing messages with customer data. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For template variables, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in template variables is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 53 — Template Review Checklist

Purpose: Checking content before sending

This page explains template review checklist in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to checking content before sending. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to template review checklist. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for checking content before sending. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For template review checklist, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in template review checklist is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 54 — WhatsApp Campaign Workflow

Purpose: Planning a campaign from audience to follow-up

This page explains whatsapp campaign workflow in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to planning a campaign from audience to follow-up. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to whatsapp campaign workflow. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for planning a campaign from audience to follow-up. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For whatsapp campaign workflow, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in whatsapp campaign workflow is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 55 — A/B Testing Basics

Purpose: Comparing message variations

This page explains a/b testing basics in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to comparing message variations. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to a/b testing basics. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for comparing message variations. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For a/b testing basics, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in a/b testing basics is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 56 — Campaign Analytics

Purpose: Understanding performance information

This page explains campaign analytics in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understanding performance information. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to campaign analytics. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding performance information. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For campaign analytics, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in campaign analytics is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 57 — Link Tracking

Purpose: Using tracked links when available

This page explains link tracking in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using tracked links when available. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to link tracking. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using tracked links when available. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For link tracking, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in link tracking is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 58 — Flow Builder Introduction

Purpose: Understanding visual automation

This page explains flow builder introduction in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understanding visual automation. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to flow builder introduction. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding visual automation. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For flow builder introduction, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in flow builder introduction is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Important note

A flow is a visual sequence of triggers, actions, waits and conditions. Build the simplest journey that solves the customer task.

Page 59 — Creating a Simple Flow

Purpose: Building a basic customer journey

This page explains creating a simple flow in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to building a basic customer journey. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to creating a simple flow. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for building a basic customer journey. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For creating a simple flow, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in creating a simple flow is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 60 — Flow Triggers

Purpose: Starting an automation from customer actions

This page explains flow triggers in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to starting an automation from customer actions. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to flow triggers. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for starting an automation from customer actions. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For flow triggers, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in flow triggers is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 61 — Send Message Nodes

Purpose: Sending messages from a flow

This page explains send message nodes in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to sending messages from a flow. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to send message nodes. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for sending messages from a flow. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For send message nodes, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in send message nodes is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 62 — Wait and Delay Nodes

Purpose: Adding time between steps

This page explains wait and delay nodes in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to adding time between steps. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to wait and delay nodes. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for adding time between steps. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For wait and delay nodes, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in wait and delay nodes is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 63 — Condition Nodes

Purpose: Branching a customer journey

This page explains condition nodes in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to branching a customer journey. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to condition nodes. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for branching a customer journey. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For condition nodes, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in condition nodes is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 64 — Buttons and Choices

Purpose: Letting customers select a path

This page explains buttons and choices in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to letting customers select a path. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to buttons and choices. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for letting customers select a path. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For buttons and choices, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in buttons and choices is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 65 — Media and Rich Content in Flows

Purpose: Adding useful content to automated journeys

This page explains media and rich content in flows in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to adding useful content to automated journeys. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to media and rich content in flows. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for adding useful content to automated journeys. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For media and rich content in flows, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in media and rich content in flows is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 66 — Flow Variables and Customer Data

Purpose: Using contact information inside flows

This page explains flow variables and customer data in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using contact information inside flows. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to flow variables and customer data. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using contact information inside flows. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For flow variables and customer data, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in flow variables and customer data is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 67 — Appointments in Flows

Purpose: Collecting and managing booking requests

This page explains appointments in flows in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to collecting and managing booking requests. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to appointments in flows. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for collecting and managing booking requests. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For appointments in flows, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in appointments in flows is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 68 — Google Sheets or External Data Steps

Purpose: Using connected data steps where enabled

This page explains google sheets or external data steps in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using connected data steps where enabled. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to google sheets or external data steps. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using connected data steps where enabled. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For google sheets or external data steps, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in google sheets or external data steps is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 69 — Webhook and Integration Steps

Purpose: Understanding event-based connections as an end user

This page explains webhook and integration steps in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understanding event-based connections as an end user. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to webhook and integration steps. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding event-based connections as an end user. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For webhook and integration steps, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in webhook and integration steps is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 70 — AI Responder in Flows

Purpose: Using AI for selected conversations

This page explains ai responder in flows in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using ai for selected conversations. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to ai responder in flows. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using ai for selected conversations. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For ai responder in flows, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in ai responder in flows is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 71 — Testing a Flow

Purpose: Testing paths before publishing

This page explains testing a flow in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to testing paths before publishing. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to testing a flow. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for testing paths before publishing. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For testing a flow, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in testing a flow is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 72 — Flow Monitoring

Purpose: Checking active and completed journeys

This page explains flow monitoring in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to checking active and completed journeys. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to flow monitoring. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for checking active and completed journeys. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For flow monitoring, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in flow monitoring is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 73 — AI Assistant Basics

Purpose: Understanding AI-powered customer assistance

This page explains ai assistant basics in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understanding ai-powered customer assistance. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to ai assistant basics. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding ai-powered customer assistance. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For ai assistant basics, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in ai assistant basics is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Important note

AI assistance can help answer routine questions, draft responses and use approved knowledge. Human review remains important for unusual, sensitive or commercially important conversations.

Page 74 — Writing Better AI Instructions

Purpose: Giving clear instructions to the assistant

This page explains writing better ai instructions in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to giving clear instructions to the assistant. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to writing better ai instructions. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for giving clear instructions to the assistant. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For writing better ai instructions, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in writing better ai instructions is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 75 — Knowledge and FAQ Content

Purpose: Preparing useful customer-facing information

This page explains knowledge and faq content in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to preparing useful customer-facing information. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to knowledge and faq content. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for preparing useful customer-facing information. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For knowledge and faq content, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in knowledge and faq content is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 76 — AI Conversation Handling

Purpose: Letting AI handle routine questions

This page explains ai conversation handling in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to letting ai handle routine questions. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to ai conversation handling. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for letting ai handle routine questions. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For ai conversation handling, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in ai conversation handling is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 77 — Human Escalation with AI

Purpose: Moving complex conversations to a person

This page explains human escalation with ai in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to moving complex conversations to a person. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to human escalation with ai. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for moving complex conversations to a person. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For human escalation with ai, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in human escalation with ai is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 78 — AI Draft Assistance

Purpose: Using AI to help agents write replies

This page explains ai draft assistance in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using ai to help agents write replies. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to ai draft assistance. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using ai to help agents write replies. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For ai draft assistance, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in ai draft assistance is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 79 — AI Translation

Purpose: Handling multilingual conversations

This page explains ai translation in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to handling multilingual conversations. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to ai translation. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for handling multilingual conversations. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For ai translation, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in ai translation is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 80 — AI Quality Control

Purpose: Reviewing AI replies before relying on them

This page explains ai quality control in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to reviewing ai replies before relying on them. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to ai quality control. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for reviewing ai replies before relying on them. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For ai quality control, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in ai quality control is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 81 — CRM Sales Pipeline

Purpose: Managing opportunities through stages

This page explains crm sales pipeline in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to managing opportunities through stages. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to crm sales pipeline. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for managing opportunities through stages. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For crm sales pipeline, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in crm sales pipeline is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Important note

A pipeline gives sales users a visual way to track opportunities through stages. Keep stage changes aligned with the actual customer status.

Page 82 — Leads and Opportunities

Purpose: Turning conversations into sales work

This page explains leads and opportunities in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to turning conversations into sales work. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to leads and opportunities. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for turning conversations into sales work. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For leads and opportunities, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in leads and opportunities is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 83 — Companies and Customer Relationships

Purpose: Managing business customers

This page explains companies and customer relationships in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to managing business customers. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to companies and customer relationships. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for managing business customers. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For companies and customer relationships, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in companies and customer relationships is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 84 — Tasks and Reminders

Purpose: Organizing sales and support actions

This page explains tasks and reminders in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to organizing sales and support actions. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to tasks and reminders. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for organizing sales and support actions. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For tasks and reminders, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in tasks and reminders is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 85 — Proposals and Estimates

Purpose: Preparing customer-facing commercial information

This page explains proposals and estimates in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to preparing customer-facing commercial information. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to proposals and estimates. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for preparing customer-facing commercial information. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For proposals and estimates, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in proposals and estimates is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 86 — Invoices and Payment Follow-Up

Purpose: Tracking commercial follow-up

This page explains invoices and payment follow-up in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to tracking commercial follow-up. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to invoices and payment follow-up. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for tracking commercial follow-up. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For invoices and payment follow-up, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in invoices and payment follow-up is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 87 — Projects and Post-Sale Work

Purpose: Managing delivery after a sale

This page explains projects and post-sale work in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to managing delivery after a sale. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to projects and post-sale work. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for managing delivery after a sale. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For projects and post-sale work, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in projects and post-sale work is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 88 — Catalog and Products

Purpose: Using product information in customer conversations

This page explains catalog and products in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to use product information in customer conversations. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to catalog and products. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using product information in customer conversations. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For catalog and products, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in catalog and products is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 89 — Store and Order Conversations

Purpose: Handling customer questions around products and orders

This page explains store and order conversations in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to handling customer questions around products and orders. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to store and order conversations. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for handling customer questions around products and orders. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For store and order conversations, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in store and order conversations is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 90 — Forms

Purpose: Collecting structured customer information

This page explains forms in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to collect structured customer information. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to forms. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for collecting structured customer information. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For forms, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in forms is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 91 — Chat Links

Purpose: Creating trackable conversation entry points

This page explains chat links in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to creating trackable conversation entry points. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to chat links. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for creating trackable conversation entry points. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For chat links, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in chat links is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 92 — Meta Ads / Click-to-Chat Leads

Purpose: Handling conversations originating from ads

This page explains meta ads / click-to-chat leads in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to handling conversations originating from ads. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to meta ads / click-to-chat leads. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for handling conversations originating from ads. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For meta ads / click-to-chat leads, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in meta ads / click-to-chat leads is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 93 — WhatsApp Calling

Purpose: Using calling features where enabled

This page explains whatsapp calling in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to using calling features where enabled. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to whatsapp calling. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for using calling features where enabled. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For whatsapp calling, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in whatsapp calling is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 94 — Team Performance

Purpose: Understanding agent activity and workload

This page explains team performance in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to understanding agent activity and workload. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to team performance. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for understanding agent activity and workload. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For team performance, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in team performance is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 95 — Reports and Analytics

Purpose: Reading business activity data

This page explains reports and analytics in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to reading business activity data. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to reports and analytics. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for reading business activity data. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For reports and analytics, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in reports and analytics is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Important note

Reports are useful for spotting trends and workload. Always check the selected date range, channel and filters before comparing numbers.

Page 96 — Daily End-User Workflow

Purpose: A practical morning-to-evening routine

This page explains daily end-user workflow in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to a practical morning-to-evening routine. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to daily end-user workflow. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for a practical morning-to-evening routine. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For daily end-user workflow, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in daily end-user workflow is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 97 — Troubleshooting Common Problems

Purpose: What to check before escalating an issue

This page explains troubleshooting common problems in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to what to check before escalating an issue. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to troubleshooting common problems. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for what to check before escalating an issue. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For troubleshooting common problems, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in troubleshooting common problems is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Important note

Start with the simplest checks: correct account, correct workspace, correct customer, network connection, visible status, and whether the action requires another user permission.

Page 98 — Data Quality and Customer Privacy

Purpose: Good practices for customer information

This page explains data quality and customer privacy in `crm.flowpilot.in.net` from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to good practices for customer information. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open `crm.flowpilot.in.net` and sign in with the user account supplied by your organization.
2. Open the area related to data quality and customer privacy. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for good practices for customer information. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For data quality and customer privacy, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in data quality and customer privacy is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 99 — Practical Playbooks

Purpose: Ready-to-use sales and support workflows

This page explains practical playbooks in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to ready-to-use sales and support workflows. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to practical playbooks. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for ready-to-use sales and support workflows. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For practical playbooks, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in practical playbooks is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.

Page 100 — End-User Quick Reference

Purpose: Daily checklist and final reference

This page explains end-user quick reference in crm.flowpilot.in.net from an everyday user's perspective. The goal is to help a sales, support, marketing, or operations user complete the task without needing server access, developer access, API configuration, database access, or administrator privileges. Use the controls that are visible to your account. Some features can be hidden or restricted by your workspace permissions. Use this section when you need to daily checklist and final reference. Before changing customer information or sending messages, check the customer record, audience, message content, and any required approvals used by your organization.

Step-by-step procedure

1. Open crm.flowpilot.in.net and sign in with the user account supplied by your organization.
2. Open the area related to end-user quick reference. If it is not visible, use the main navigation or the workspace search where available.
3. Review the information already shown before making a change. Confirm that you are working on the correct customer, conversation, list, campaign, or record.
4. Enter or select the information required for daily checklist and final reference. Keep names, phone numbers, tags, dates, and message text accurate.
5. Review the screen carefully before saving, sending, publishing, or confirming an action.
6. Complete the action and wait for the on-screen confirmation or updated status.
7. Return to the relevant list, inbox, campaign, or record and verify that the result appears as expected.
8. If the action fails, note the exact message shown on screen and use the troubleshooting section before repeating the action.

Best practices

- Work from the customer record whenever possible so the latest conversation and customer information are visible.
- Use clear tags and consistent naming so other team members can understand your customer segments.
- Preview messages and confirm the intended audience before sending anything to multiple customers.
- Keep internal notes factual and useful. Do not place confidential information into a customer-facing message.
- Use automation for repetitive, predictable tasks and move unusual or sensitive conversations to a human.
- After a campaign or automation runs, check statuses and replies rather than assuming every recipient received the message.
- If a feature is unavailable to your user account, do not attempt to bypass permissions; contact the person responsible for your workspace.

What success looks like

You should finish this task with a clear, verifiable result: the correct record or conversation is updated, the intended audience or workflow is selected, and the system shows the expected status. For end-user quick reference, avoid assuming that a button click means the final business action has completed; check the resulting status, history, or confirmation screen.

Common mistake to avoid

The most common user error in end-user quick reference is performing the action without first checking the target record, audience, or current status. Slow down for the final review step, especially when the action can message customers or change a sales record.