StartERP
AI BUSINESS OS

MODULE GUIDE 3 OF 14

Customers, CRM and loyalty

Leads and follow-ups, marketing campaigns and ads, promotions, loyalty points, gift cards, customer wallets, WhatsApp and the waiting line. Step-by-step instructions for each of the 9 modules, with the real screens you will use.

CRM: leads & pipeline
Marketing & ads (AI)
Business finder & WhatsApp campaigns
Promotions & coupons
Loyalty points
Gift cards
Customer wallet
WhatsApp inbox
Token & counter

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How to use this guide

Each chapter covers one module: what it does, how to start in a few steps, and then each of its screens with the steps to follow. The label under each module name says whether every store has it or whether it is an add-on module switched on for your store.

> **Where to find what your store has.** Open **Settings** → **Modules** to see the modules your store has. Every screen has a **?** button at the top with the steps for that screen, and the ⓘ beside a title explains what the screen shows.

> **About the screenshots.** They come from StartERP demo stores (starterp.org/#/demo-store) for a Saudi trading business, so the names and figures are sample data. Your screens show your own company, products and figures, and some words change to suit your business.

The modules in this guide

Module	What it gives you
CRM: leads & pipeline Add-on	Every enquiry from your website, WhatsApp, the counter or an ad becomes a lead on a pipeline, with follow-up reminders, a one-click customer and a conversion report by source and owner; then accounts with their contacts, reorder and credit health, quote follow-ups and lost demand
Marketing & ads (AI) Add-on	Run campaigns on Facebook, Instagram, Google, TikTok, Snapchat, email, WhatsApp and SMS, with AI ad copy, audiences from your customers and the sales each campaign brought
Business finder & WhatsApp campaigns Add-on	Find the businesses of the categories you sell to in any city on Google Maps, keep their name, number, address and map pin, and send each an approved WhatsApp marketing template with its category's own landing page, watching sent, delivered, read and replies live

Promotions & coupons Add-on	Run percent or amount off, buy 2 get 1, bundle prices, spend-threshold offers, happy hours and coupon codes on everything or chosen products, categories and brands, applied by themselves at the POS and on sales invoices, with sales, discount given and margin per promotion
Loyalty points Add-on	Customers earn points on every sale at the POS and on sales invoices, move up tiers by what they spend in a year, and use their points as a discount; points can expire, come back off a return, and show on the receipt, with each member's balance and what the points held are worth
Gift cards Add-on	Sell gift cards for any amount with a number, an expiry and the buyer, booked as money held (no VAT until spent), and take them as a payment at the POS and on sales invoices with the balance checked on every sale, with each card's balance and what is still owed to card holders
Customer wallet Add-on	Keep money for your customers: they top up a wallet, pay later sales from it at the POS and on sales invoices, and returns are refunded into it, booked as money held (no VAT until spent), with the balance on the receipt and in the client portal
WhatsApp inbox Add-on	Every WhatsApp chat with your customers and leads in one team inbox on your official number: assign, label, reply with canned answers, send approved templates after the 24-hour window, turn a chat into a lead in one click and see response times and message cost
Token & counter Add-on	Tokens from a kiosk at the door or from reception, per service with its letter (A-001, B-001) and priority for senior citizens, people of determination, expecting mothers, VIPs and appointments; a counter console with call next, recall, hold, transfer, served and no-show; a display board that shows and announces each call in English and Arabic; the visit on the customer's record and in the CRM, an invoice from the counter, and waiting-time and counter reports

01

CRM: leads & pipeline

Add-on module

Every enquiry on one pipeline, answered fast and followed to a sale

A lead takes two clicks: name, phone, Save. Enquiries from your website form, a Click-to-WhatsApp ad or the client portal arrive by themselves with the campaign that brought them, and a repeat enquiry lands on the open lead instead of a duplicate. The pipeline shows every open lead by stage with its value and probability; drag a card to move it, and a follow-up date is kept on each one so nothing goes quiet: the day after it passes, a reminder is raised. Log a call, meeting or message in two clicks (the first one times your response), convert the lead to a customer in one click and quote them from there. The conversion report shows leads, won and lost by source and by owner, the funnel by stage and how fast enquiries were answered.

What you get

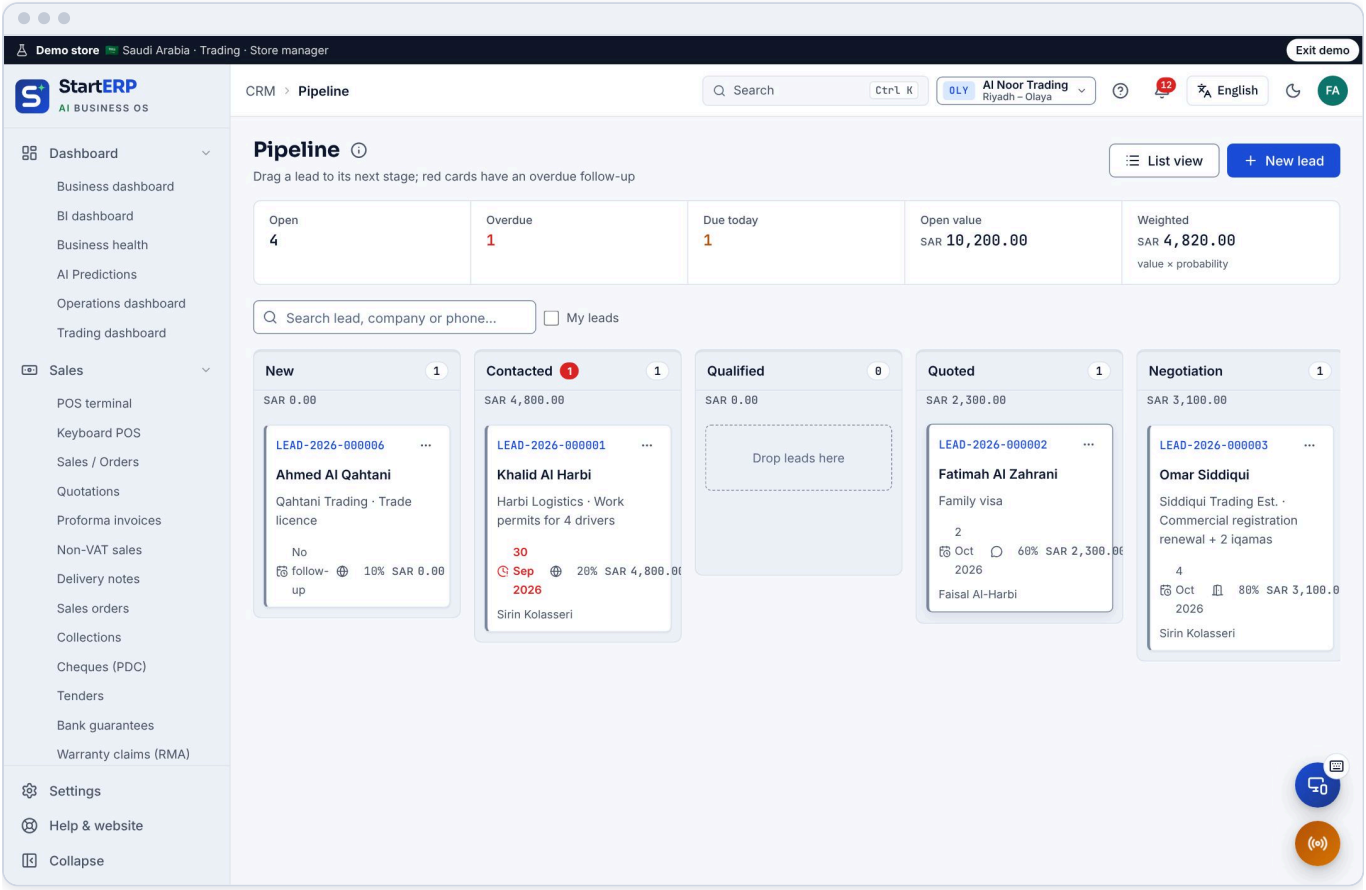
- A pipeline of every open lead with value, probability and a follow-up colour; drag to move
- A form for your website that keeps utm_* and ad click ids; duplicates by phone or email refused
- Follow-up reminders under the bell; the first call or message times your response
- One-click customer and quotation; conversion by source, owner and funnel stage

GET STARTED IN 3 STEPS

1. **Add your first lead.** Name and phone, then Save.
2. **Connect your enquiry sources.** Website form and WhatsApp ads add leads by themselves.
3. **Work the pipeline.** Drag leads through stages and set follow-ups.

Pipeline

Every open lead on one board, one column per stage: New, Contacted, Qualified, Quoted and Negotiation. Each card shows the lead's value and probability and the colour of its follow-up: red when the date has passed, amber today. Drag a card to its next stage. Part of the CRM: leads & pipeline add-on.



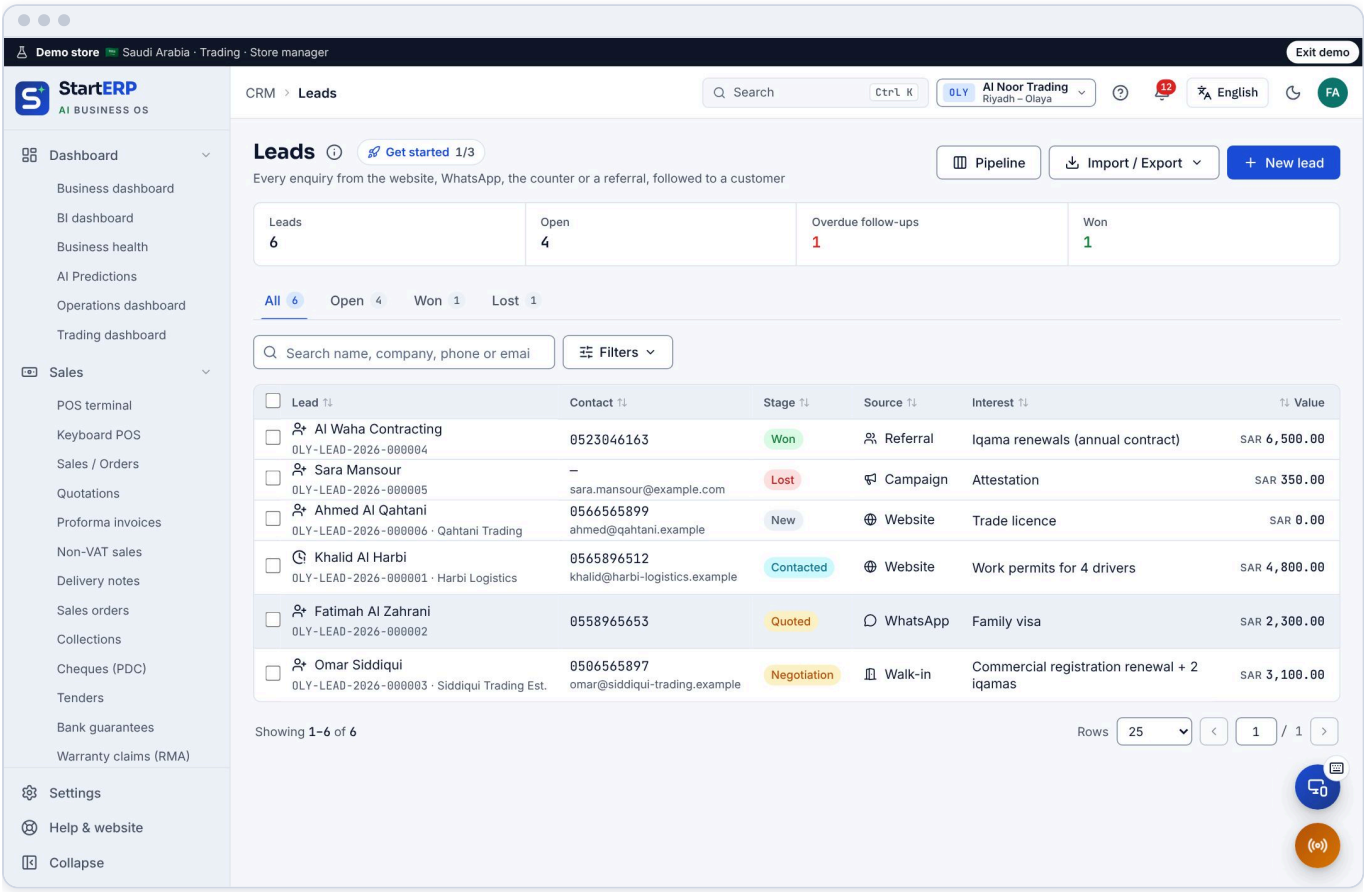
Pipeline

1. Open CRM → Pipeline. The tiles count the open leads, the overdue and due-today follow-ups, the open value and the weighted value (value × probability); the badge on the menu counts the overdue ones.
2. Drag a card to another column to move the lead to that stage; the move is a step on its timeline and the stage's probability applies. A lead moved past New without a follow-up date gets one three days out. Or open the card's "…" menu → "Move to" for any stage, Won and Lost included.
3. Search a lead, company or phone; tick "My leads" to keep only the leads you own.
4. Click the lead number to open it; press "New lead" to add one in two fields.

Tips. A red follow-up date means the day has passed: one reminder is raised under the bell the morning after, and the column header counts them. Lost needs a reason, so moving a card to Lost opens the lead; won and lost leads leave the board and sit under Leads → Won / Lost.

Leads

One lead per enquiry, wherever it came from: the website form, WhatsApp, a campaign, a walk-in, a referral or the client portal. The lead carries the person and their company, the service they asked for, its value and probability, the owner who follows it up, the next follow-up date, the source with its campaign and utm_* tags, the activities logged (calls, meetings, messages, tasks) and the stage history up to Won or Lost. A won lead becomes a customer in one click. Part of the CRM: leads & pipeline add-on.



Leads

ON THE LIST

1. Open CRM → Leads. Each row shows the lead, their company and phone, the service of interest, the source, the stage, the value, the owner, the next follow-up with its overdue or today badge and the last activity.
2. Use the Open, Won and Lost tabs; filter by stage, source or owner; search a name, company, phone or email.
3. Press "New lead" to add one in two fields, or "Pipeline" to see the open ones by stage.

Tips. Spare parts shops see a Part request card on the lead (make, model, year, VIN and part numbers) and industrial suppliers a Customer RFQ card (RFQ no. and the day to submit the price, shown on the pipeline card); a lost lead takes its reason from the list. The tiles count the open leads, the overdue follow-ups and the won ones among the rows shown.

ON THE FORM

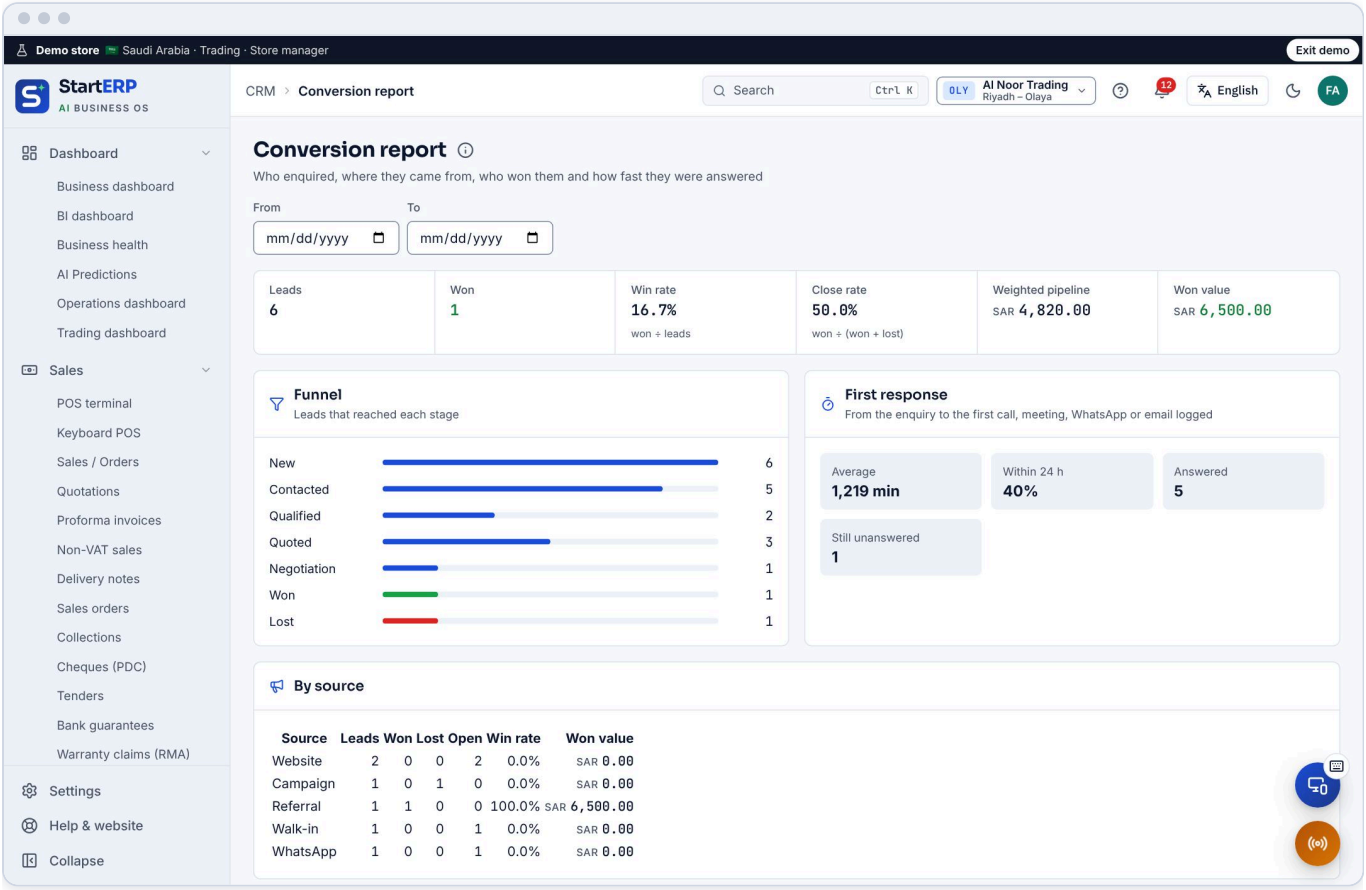
1. Type the name and a phone or an email, press Add: two fields. The lead starts as New with a 10% probability; a phone or email already on another lead is refused, whatever its spacing or country code.
2. Optionally add the company, the service of interest (or pick one from the service catalogue: its fees fill the expected value), the expected value and close date, the source, the owner and the campaign with its utm_* tags and ad click id.
3. On the edit form you can also move the stage with a note, set the probability and the next follow-up, and give the reason when a lead is lost.

ON THE RECORD

1. Move the stage in one click under "Move to" (Lost asks for the reason); set the next follow-up with what to do. Each move is a step on the Timeline tab.
2. Activities: log a call, meeting, WhatsApp, email or note with its outcome; the first one times the first response shown on the lead. A task with a due date becomes the next follow-up.
3. Press "Convert to customer" once: a customer is created from the lead (the company name, phone and email) and the lead is won; "Quotation" then opens a new quotation for that customer.

Conversion report

How the leads of a period turned out: how many came in, were won, lost or are still open, the win rate, the value won and the value still open (plain and weighted by probability), by source and by owner; the funnel of leads that reached each stage; and how fast enquiries were answered. Part of the CRM: leads & pipeline add-on.



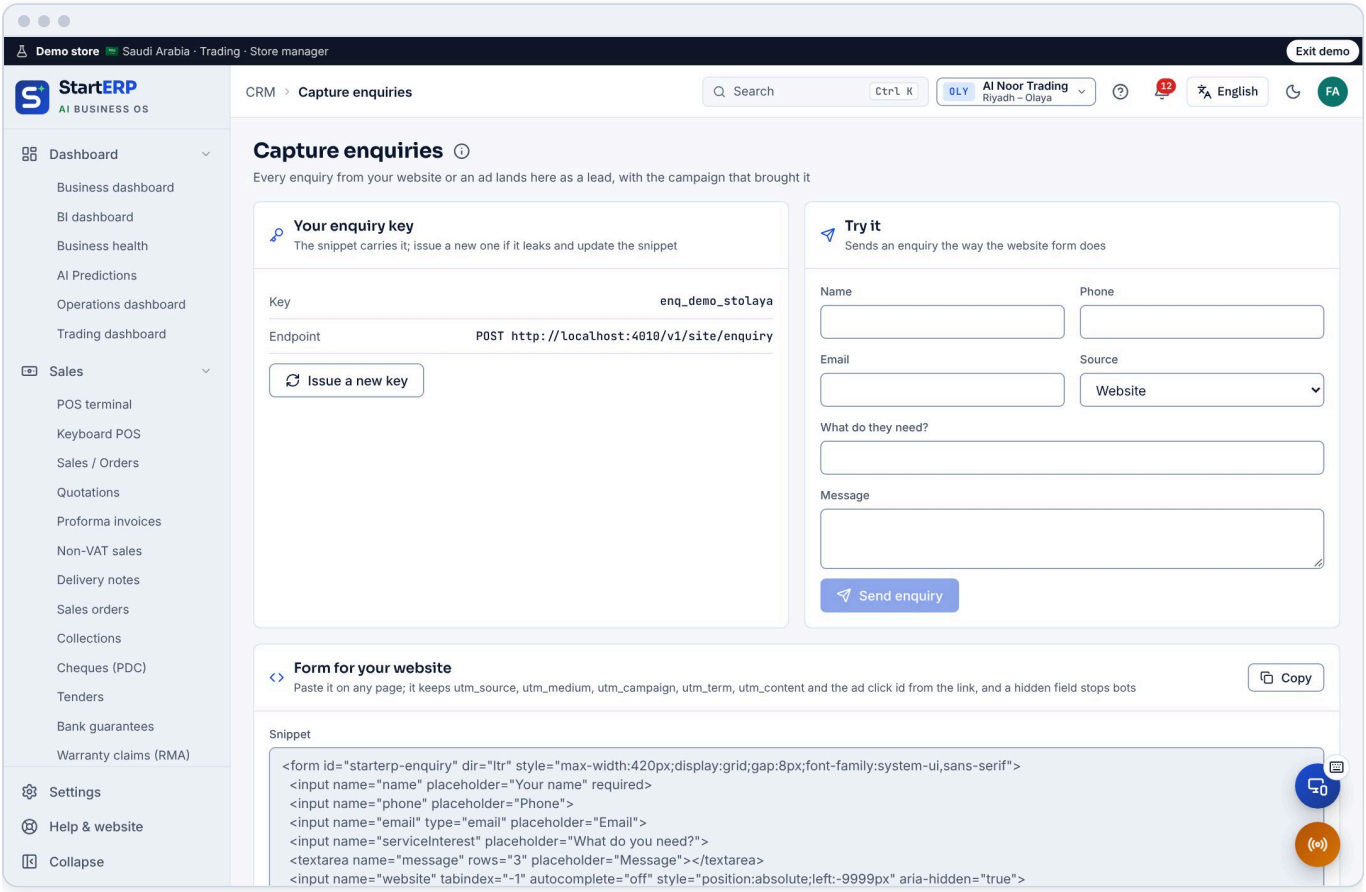
Conversion report

1. Open CRM → Conversion report. Blank dates cover every lead; set From and To to keep the leads created in those days.
2. The tiles show the leads, won, lost and open counts, the win rate (won ÷ all) and the close rate (won ÷ won + lost), the value won and the open and weighted values.
3. The funnel counts the leads that reached each stage (a lead that went straight to Quoted still counts in New). First response shows how many enquiries were answered, the average minutes to the first call or message and the share answered within 24 hours.
4. By source and By owner break the same numbers down: which channel and who brings the leads that close.

Tips. The report is computed on the server from the leads themselves, so it matches the pipeline tiles and the Leads list to the riyal.

Capture enquiries

Enquiries from your own website land as leads by themselves: copy the form snippet, paste it on any page and every submission creates a lead with the campaign and utm_* tags of the link the visitor came from. A repeat enquiry from the same phone or email is logged on the open lead instead of making a second one. The store's enquiry key signs the form; rotate it if it leaks. Part of the CRM: leads & pipeline add-on.



Capture enquiries

1. Open CRM → Capture enquiries. Your enquiry key is shown at the top; the form snippet below already carries your store and key.
2. Press Copy and paste the snippet into your website page (in Arabic the form is right-to-left). Visitors fill their name, phone or email, what they need and a message; a hidden field stops bots.
3. Use "Try it" to send one enquiry the way the website does: a new lead appears under Leads with the source you chose, and a notification is raised under the bell.
4. Press "New key" if the key leaked: the old snippet stops working at once, so paste the new one on your website.

Tips. Link your ads to the page with utm_source, utm_medium and utm_campaign in the address: the lead keeps them, and gclid or fbclid as the ad click id, so the conversion report can tell the channels apart. Enquiries are limited per hour from one address; the public endpoint never exposes your leads.

02

Marketing & ads (AI)

Add-on module

Every channel, one campaign, real sales

Run your campaigns on Facebook, Instagram, Google, YouTube, TikTok, Snapchat, LinkedIn, Pinterest, X, email, WhatsApp and SMS from one place. Build audiences from your own customers, let AI write the ads in English or Arabic, send messages with a preview first, bring each day's results in from the ad platforms, and see which campaign brought back real sales, its return on ad spend and what the AI would change, on one Marketing board and dashboard.

What you get

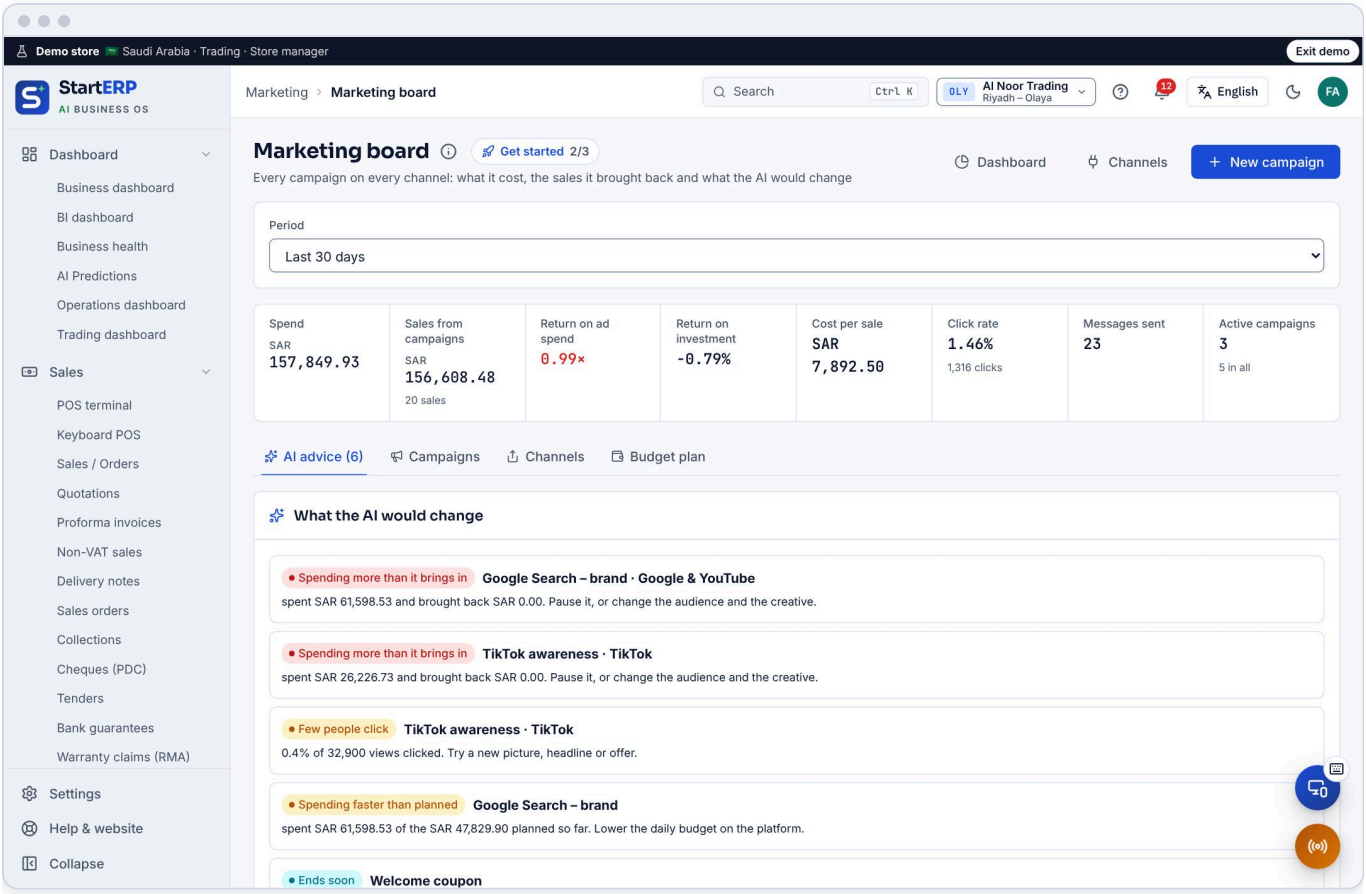
- Ads and messages on every channel
- AI copy, audiences and budget advice
- Results synced from the ad platforms
- Return on ad spend from real sales

GET STARTED IN 3 STEPS

1. **Save an audience.** Pick one the AI suggests from your sales.
2. **Plan your first campaign.** Channels, budget and ads written with AI.
3. **Read the Marketing board.** Sales brought back, ROAS and the AI's advice.

The Marketing board and dashboard

One board for every campaign on every channel: what it cost, the sales it brought back (before VAT), the return on ad spend, the cost per sale and per click, and what the AI would change. The Marketing dashboard shows the same figures as charts. Part of the Marketing & ads add-on.



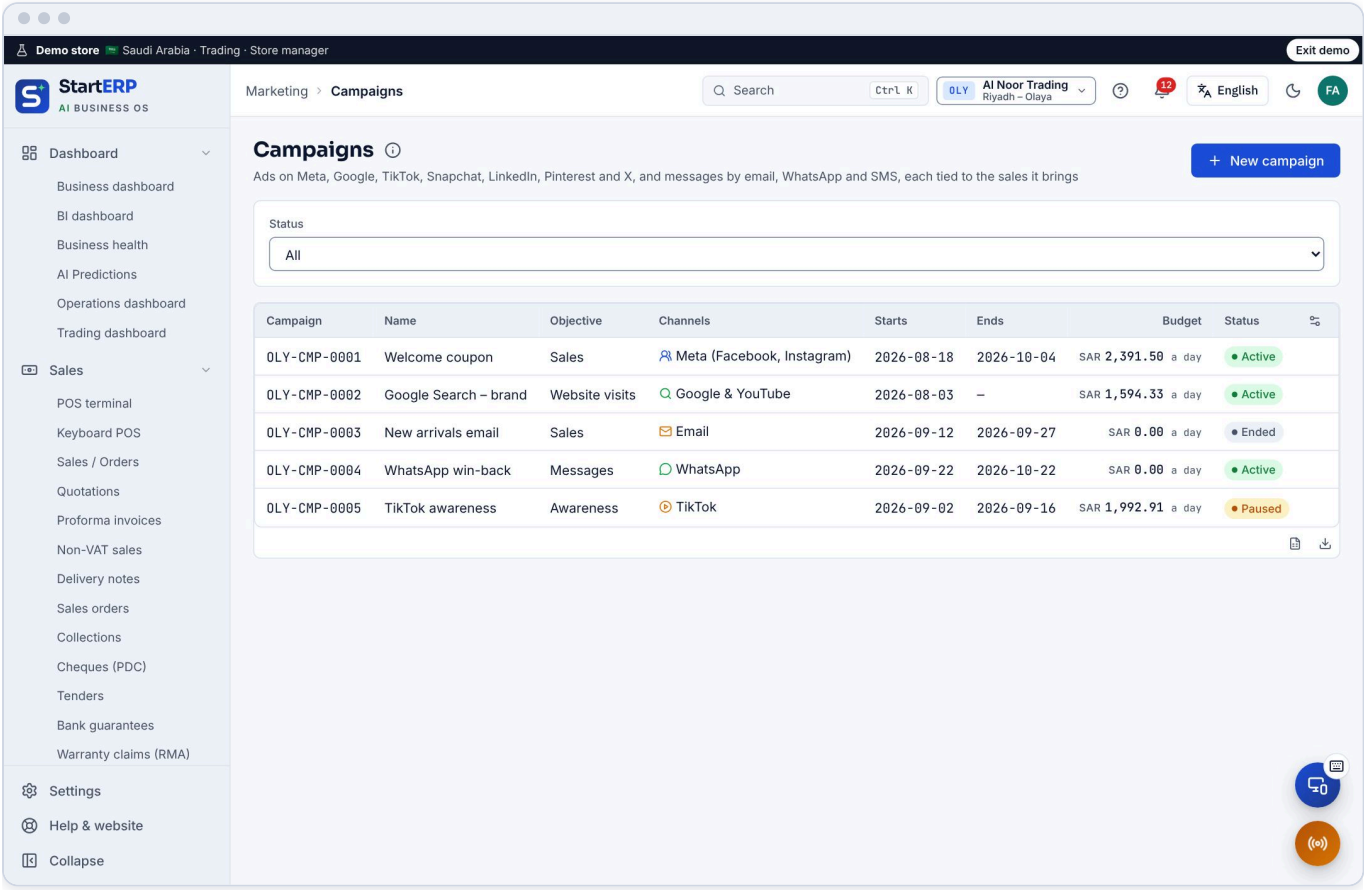
The Marketing board and dashboard

1. Open Marketing → Marketing board and pick the period (the last 30 days by default).
2. AI advice lists what to fix first: campaigns spending more than they bring in, ads few people click, the same people seeing an ad too often, spending faster or slower than planned, campaigns ending soon and the ones worth more budget.
3. Budget plan splits the same money again, more to the channels that bring back more per riyal, with the next 7 days' forecast.

Tips. A sale counts for a campaign when it uses the campaign's promo code, or when its customer was sent the campaign's email, WhatsApp or SMS within the attribution days. One sale counts for one campaign only. StartAI reads the board and answers questions such as which channel pays best; StartAI Radio says the sales campaigns brought this week, those ending soon and those losing money.

Campaigns on every channel

Plan a campaign once and run it on Meta (Facebook, Instagram, Messenger), Google and YouTube, TikTok, Snapchat, LinkedIn, Pinterest, X, email, WhatsApp, SMS or anything else such as influencers or print. Each campaign keeps its objective, dates, budget, audience, products, promo code, UTM links and its ads, written with AI.



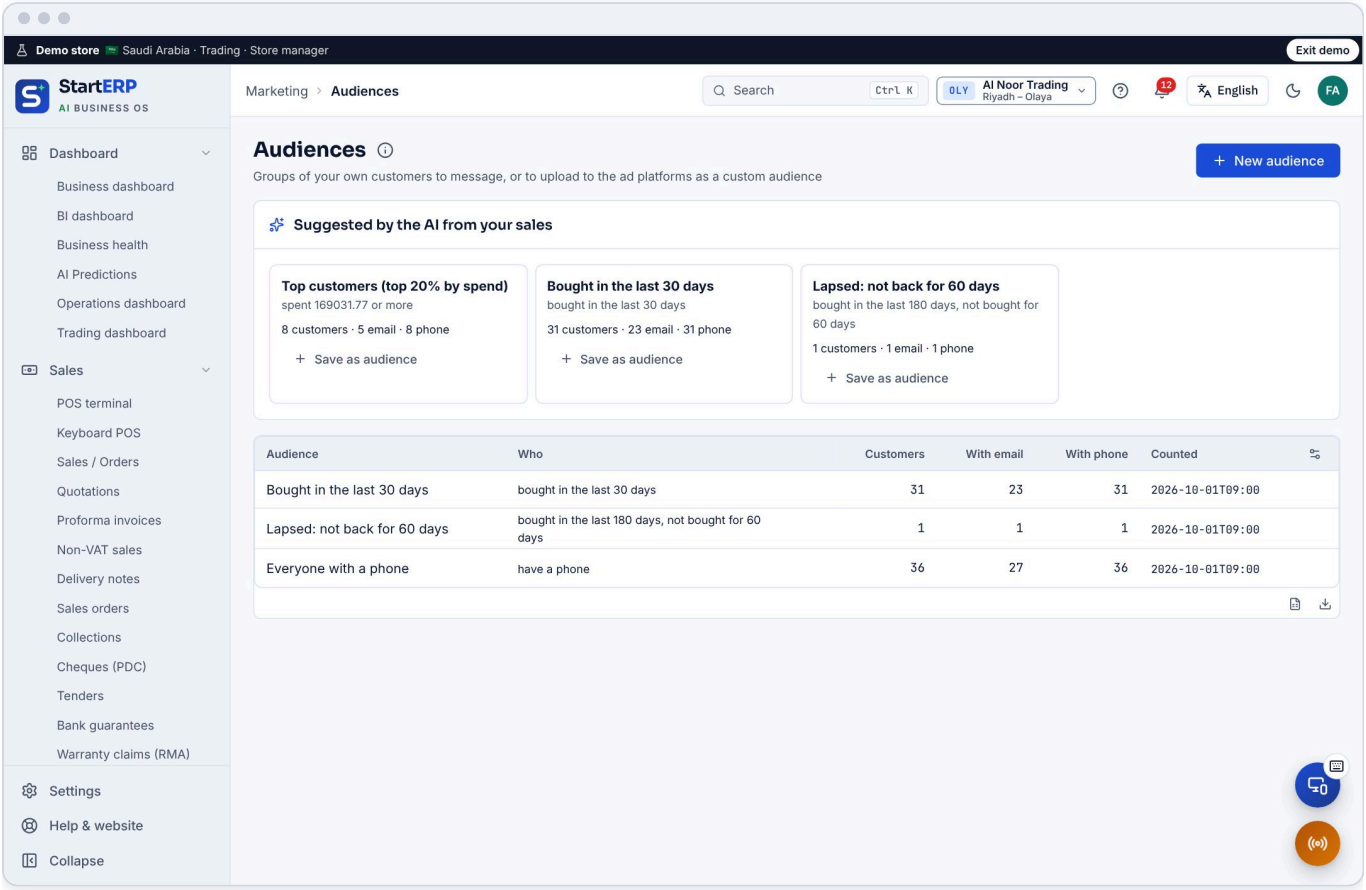
Campaigns on every channel

1. Open Marketing → Campaigns and press New campaign. Give it a name, objective, dates and a daily or total budget.
2. Pick the channels. For an ad platform, choose the connected account and type the platform's campaign id so its results sync in.
3. Press Write with AI: it writes three versions per channel within each platform's limits, in English or Arabic. The model and what it costs are shown; Rules (free) needs no model.
4. For email, WhatsApp and SMS press Send messages: the preview counts who gets it and leaves out customers who opted out or were already sent; nothing goes out until you press Send.

Tips. WhatsApp and SMS need the box saying the customers agreed to marketing messages. Every message carries a link to stop them. Use the links under Links to use in your ads: their UTM tags tell Google Analytics and the platforms where each visit came from.

Audiences from your customers

Group your own customers by what they bought: in the last 30 days, not back for 60 days, big spenders, bought a product, a city, never bought, with an email or a phone. The AI suggests the groups worth a campaign. Send them messages, or download them hashed for the ad platforms' custom audiences and lookalikes.



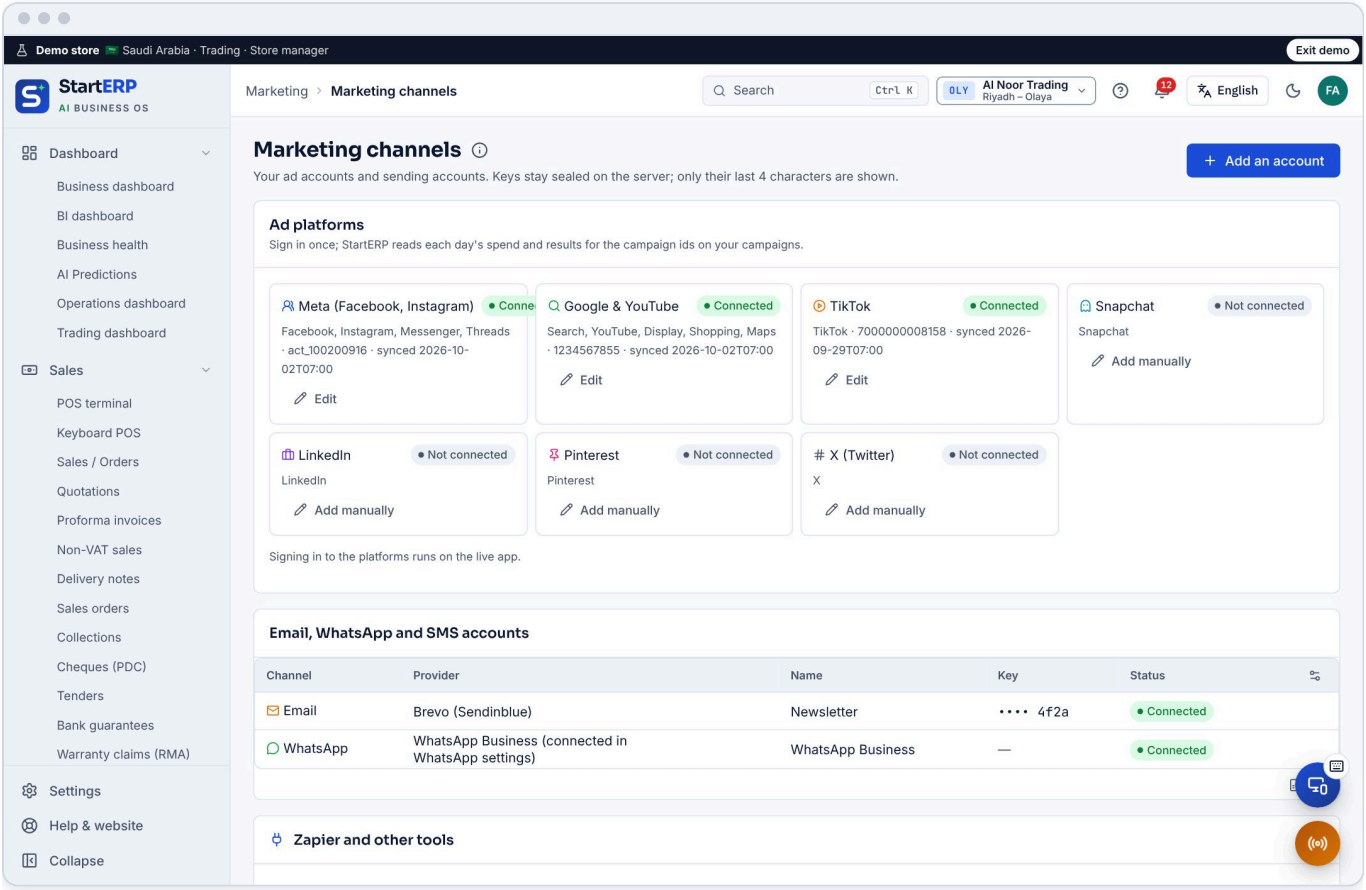
Audiences from your customers

1. Open Marketing → Audiences. Save one of the suggested groups, or press New audience and set the rules.
2. Press Count now to see how many customers are in it and how many can be reached by email and by phone.
3. Under Upload to an ad platform, download the list for Meta, Google, TikTok, Snapchat, X, LinkedIn or Pinterest and upload it there as a customer list.

Tips. Emails and phone numbers are hashed with SHA-256 before the file is made, the way the platforms ask, so no contact leaves in plain text. Each download is logged.

Marketing channels and results

Connect the accounts your campaigns run on: sign in to Meta, Google Ads, TikTok, Snapchat, LinkedIn and Pinterest so each day's spend and results come in by themselves, and add your Brevo, SendGrid, Mailchimp, Twilio or Unifonic key to send email and SMS. Results can also be imported from a platform's CSV report, typed in, or sent by Zapier.



Marketing channels and results

1. Open Marketing → Marketing channels. Under Ad platforms press Sign in for each platform and allow StartERP to read your ad results.
2. Press Sync 30 days to bring in the results for the campaign ids on your campaigns.
3. Press Add an account for email or SMS, pick the provider and paste its API key. The key is sealed on the server; only its last 4 characters show.
4. No connection yet? Open Marketing → Campaign results and import the platform's report by day as CSV, or add a day by hand.

Tips. Only the store's admin picks the AI model used to write ads; its cost per run is shown next to it.

03

Business finder & WhatsApp campaigns

Add-on module

Find the businesses you sell to and reach them on WhatsApp

Pick the categories you sell to and a city: the business finder brings their businesses from Google Maps with the name, number, address and map pin, without duplicates, and tells mobile numbers from landlines. Each category keeps its own landing page and values, so an approved WhatsApp marketing template takes every business to the page made for its trade. Campaigns send within a daily limit, skip anyone messaged recently or who asked to stop, and show sent, delivered, read and replies live.

What you get

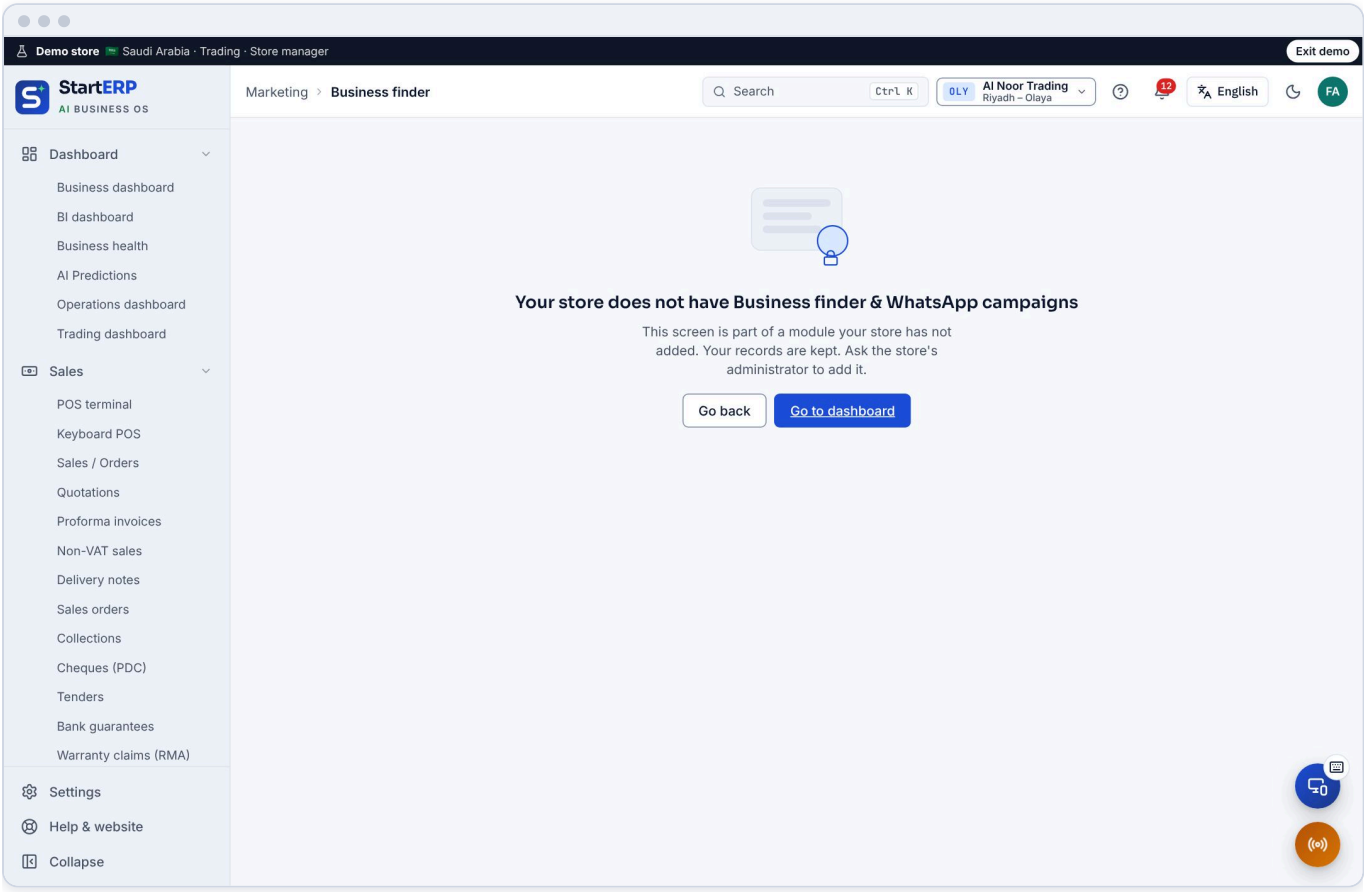
- Businesses of any category in any city
- Each category's own landing page in the message
- Approved WhatsApp marketing templates only
- Live sent, delivered, read and replies

GET STARTED IN 3 STEPS

1. **Add your target categories.** Search words, landing page and picture for each.
2. **Find businesses in a city.** From Google Maps, saved without duplicates.
3. **Start a WhatsApp campaign.** An approved marketing template, watched live.

Business finder & WhatsApp campaigns

Find the businesses of the categories you sell to in any city on Google Maps, keep their name, WhatsApp number, address and map pin as target businesses, and send them an approved WhatsApp MARKETING template that takes each business to its own category's landing page. The campaign screen shows sent, delivered, read, failed and replies live while it runs. Part of the Business finder & WhatsApp campaigns add-on, off until it is bought.



Business finder & WhatsApp campaigns

1. Open Marketing → Target categories and add each category you sell to: its Google Maps search words (English and Arabic), the landing page link the message takes the business to, a picture link for templates with a picture header and any extra values ({var.KEY}).
2. Open Marketing → Business finder, pick the categories, type the city and the depth (quick, whole city or deep), check the most it can cost and press Find businesses. Businesses are saved as they are found, without duplicates, with whether the number is a mobile (WhatsApp likely) or a landline.
3. Open Marketing → WhatsApp campaigns → New campaign: pick the categories and cities, an approved MARKETING template and the value of each slot ({business}, {city}, {category}, {landing}, {image}, {store}, {phone}, {var.KEY}). Press Preview to read the message as a business will, and Send test to send it to any number (your own phone) first; then Start: it sends within the daily limit and messages a minute you set, and the screen updates live.

Tips. Google Places (New) must be turned on for the Google Maps key in Settings; each search page is billed by Google (about USD 0.035 after the free 1,000 a month), so the finder shows the most a search can cost and stops at the monthly cap a manager sets. WhatsApp only allows marketing templates to people who agreed to hear from you: confirm that before you start, keep the daily limit low and include a Stop promotions button. A business that replies stop is opted out at once and never messaged again; one messaged recently is skipped for the days you set. Ask StartAI "how is the WhatsApp campaign doing?" or "how many target restaurants do we have in Jeddah?": it reads the summary and the target businesses. Finding businesses and starting a campaign are done by you on these screens.

04

Promotions & coupons

Add-on module

Offers that run themselves at the till

Set up percent or amount off, buy 2 get 1, bundle prices such as 3 for 10, spend-threshold offers, happy hours and coupon codes, on everything or on chosen products, categories and brands, for chosen dates, days, hours and customer groups. The POS and the sales invoice apply them by themselves as items are added, show the offer on the line and save it as the line's discount, so ZATCA, printing and reports need nothing new. See sales, discount given and margin of each promotion.

What you get

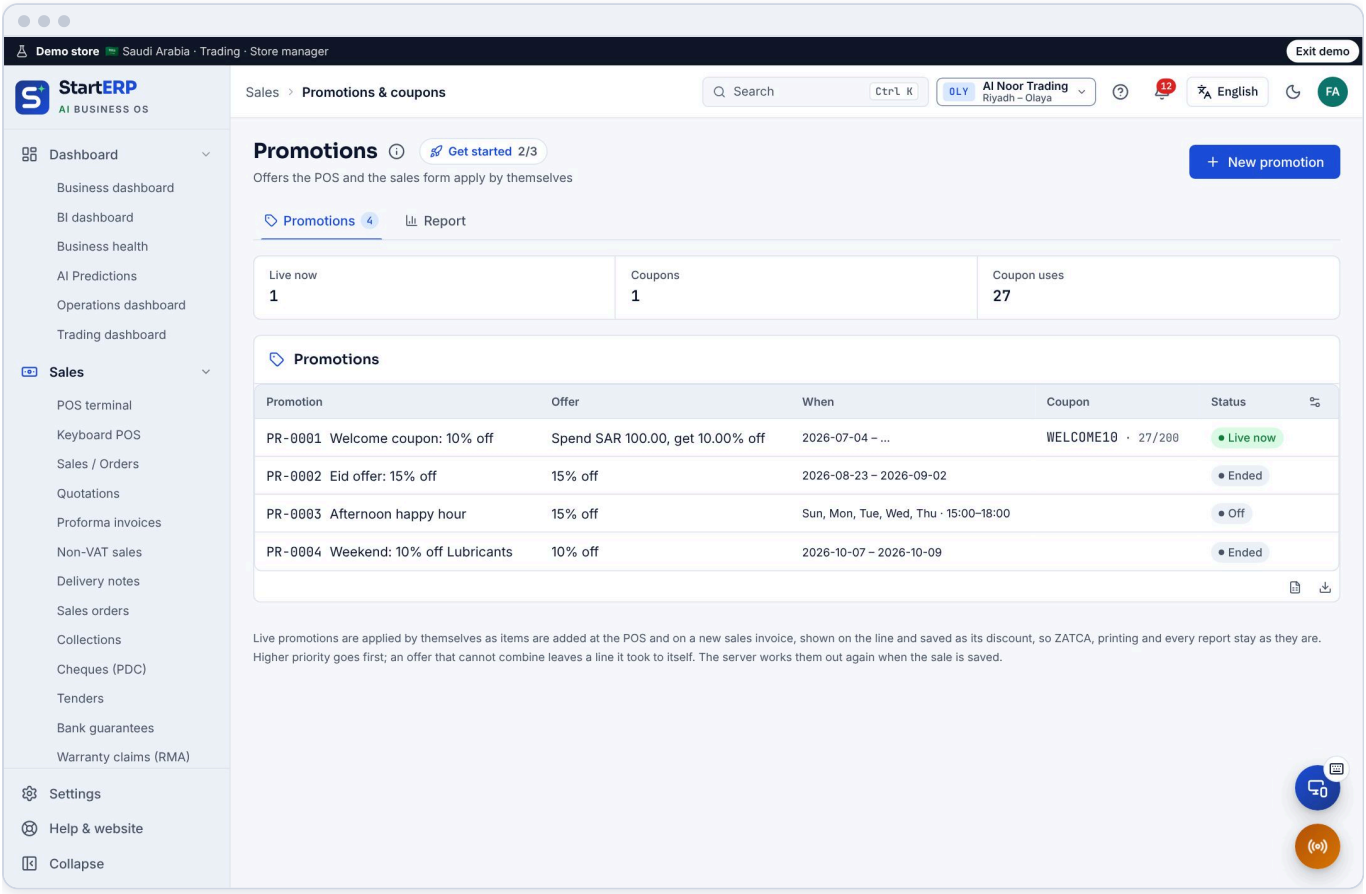
- Buy X get Y, bundles and happy hours
- Coupon codes with a usage limit
- Applied by themselves at the POS
- Discount given and margin per offer

GET STARTED IN 3 STEPS

1. **Create an offer.** Percent off, buy 2 get 1, bundle or coupon.
2. **Choose when it runs.** Dates, days, hours and customer groups.
3. **Sell; it applies itself.** Then see sales and margin per offer.

Promotions & coupons

Set up offers once and the POS and the sales invoice apply them by themselves: percent or amount off, buy X get Y, bundle prices, spend-threshold offers, happy hours and coupon codes. The offer shows on the line and is saved as the line's discount. Part of the Promotions add-on.



Promotions & coupons

1. Open Sales → Promotions & coupons and press New promotion. Give it a name (it shows on the line and the receipt) and pick the offer: Percent off, Amount off each unit, Buy X get Y, Bundle price or Spend threshold.
2. Under On, choose Everything or chosen products, categories or brands, and a minimum quantity if you want one.
3. Under When and for whom, set the dates, tick the days and type the hours for a happy hour; add customer groups (the customer's category, such as Wholesale) to keep it for them.
4. For a coupon, type its code and how many times it can be used; the offer then applies only when the cashier types the code in the POS Discount window or in Coupon code on the sales invoice.
5. Sell as usual: the POS and a new sales invoice apply the live offers as items are added and show each offer's name and saving under the line.
6. On the Report tab pick a period to see each promotion's sales, quantity, revenue, discount given, cost and margin, with charts; download Excel or print.

Tips. Higher priority goes first. An offer that cannot combine keeps a line it took to itself; two offers that can combine both apply, the second on what is left. In Buy X get Y the cheapest items go free (or at the % off you set); in a bundle the dearest items make up the bundle. Tick Amounts include VAT when the amounts (amount off, bundle price, spend threshold) are as the customer sees the price. The server works the promotions out again when the sale is saved: a saving above the offer's is refused, a used-up coupon is refused, and each coupon use is counted. A role's maximum discount does not count the store's own offers. Saved invoices keep their discounts: editing an old invoice does not apply today's offers again.

05

Loyalty points

Add-on module

Bring customers back with points

Every sale to a named customer earns points, at the POS and on sales invoices. Set how much spend earns a point, what a point is worth, the fewest points to use and when points expire, and tiers such as Silver and Gold by what a customer spent in the last 12 months, each earning more. The cashier sees the customer's points and uses them as a discount before VAT; a return takes its points back. See each member's balance and what all the points held are worth.

What you get

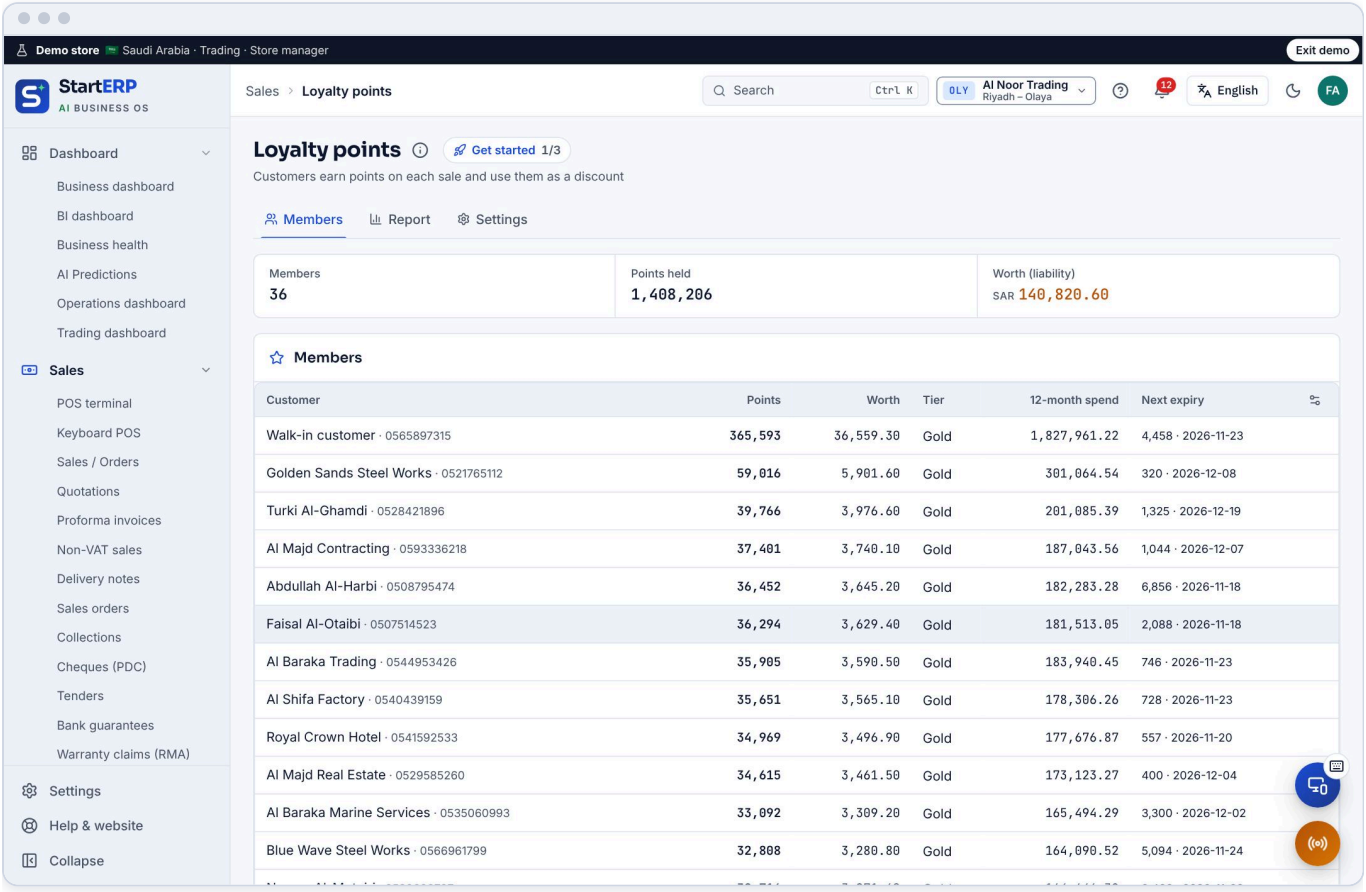
- Points on every sale
- Tiers by yearly spend
- Used as a discount at the till
- Balances and liability report

GET STARTED IN 3 STEPS

1. **Set your points rules.** Spend per point, point value, expiry and tiers.
2. **Sell to a named customer.** Points are earned on every sale.
3. **Redeem at the till.** Points become a discount.

Loyalty points

Customers earn points on every sale at the POS and on sales invoices, climb tiers by what they spend in a year and use their points as a discount before VAT. Part of the Loyalty points add-on.



Loyalty points

1. Open Sales → Loyalty points → Settings. Set the spend for 1 point (on the total with VAT), the value of 1 point, the fewest points a customer can use, and after how many months points expire (0 = never). Save.
2. Add tiers if you want them, such as Silver from 5,000 a year earning 1.5 times the points. A customer's tier follows their sales less returns in the last 12 months.
3. Sell to a named customer: the sale earns points by itself. At the POS the cart shows the points it earns; on a sales invoice the line under Points to use does.
4. To use points, open Discount at the POS and type the points in Loyalty points (or press Use all), or type them in Points to use on the sales invoice. Their value comes off as a discount before VAT.
5. The Members tab lists each customer's points, what they are worth, tier, 12-month spend and next expiry. The Report tab shows points earned, used and expired over a period, by member and by month, with Excel and print.

Tips. A return takes back the points its sale earned, in proportion to what was returned, and gives back points that sale used. Points are used oldest first, so the points nearest expiry go first. The server checks every sale: points above the customer's balance, below the minimum, without a customer or without their discount are refused. Points used do not count against a role's maximum discount. Worth (liability) is what all the points held would take off future sales.

06

Gift cards

Add-on module

Sell gift cards, take them at the till

Sell a gift card for any amount, with a printed or typed number, an expiry and the buyer if you like. It is booked as money held for the holder, not as a sale, so no VAT until it is spent. At the POS and on sales invoices the cashier types the card number, sees what is left and takes it as a payment; the sale carries its VAT as usual. See every card's balance, what was sold and spent each month, and what is still owed to card holders.

What you get

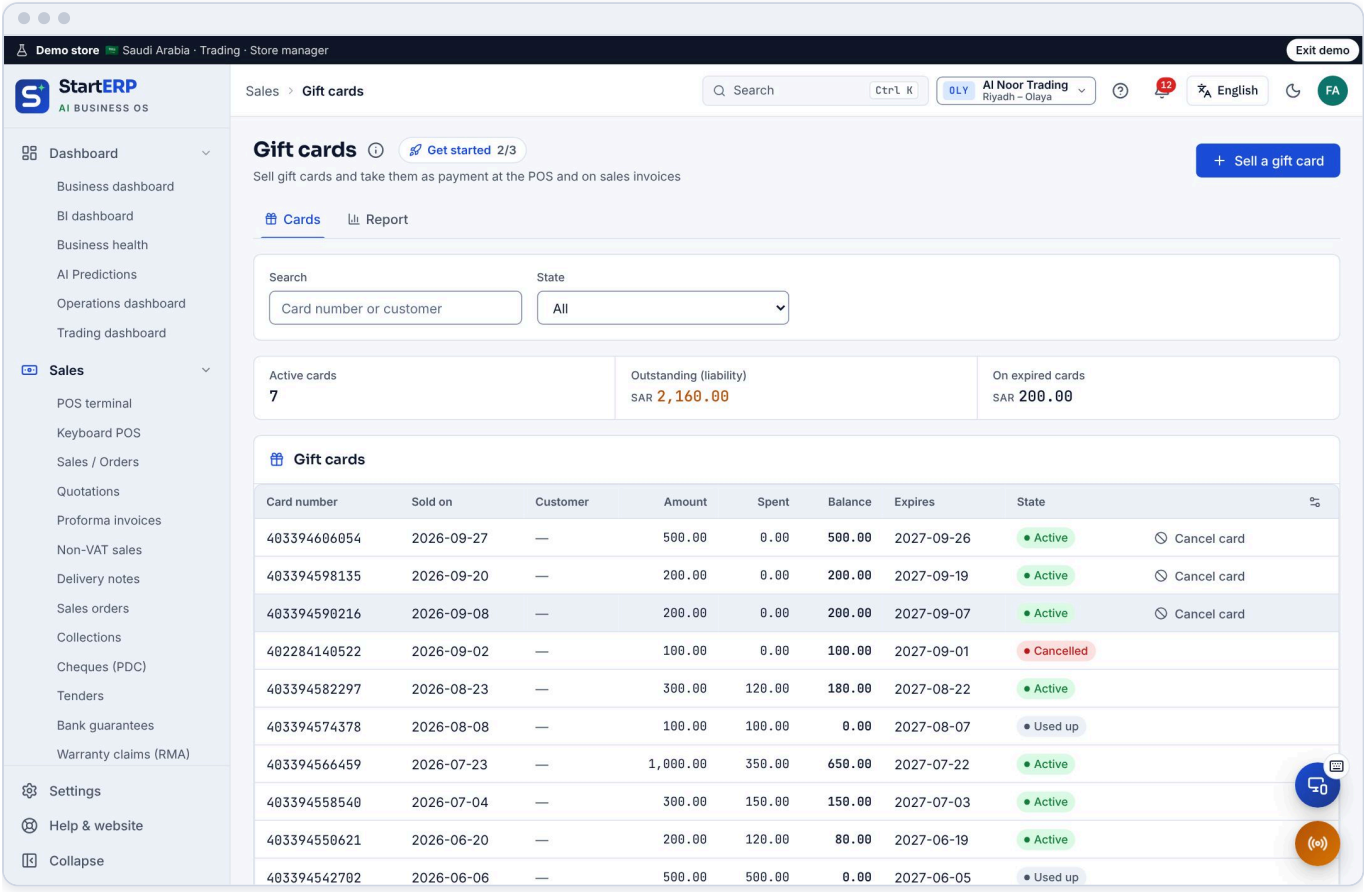
- No VAT until spent
- Paid at the POS and on invoices
- Balance checked on every sale
- Outstanding liability report

GET STARTED IN 3 STEPS

1. **Sell a gift card.** Any amount, with a number and expiry.
2. **Take it as payment.** Type the number and see what is left.
3. **Track balances.** What is still owed to card holders.

Gift cards

Sell gift cards and take them as a payment at the POS and on sales invoices. A card sold is money held for its holder, not a sale: no VAT until it is spent. Part of the Gift cards add-on.



Gift cards

1. Open Sales → Gift cards and press Sell a gift card. Type the amount, how it was paid, the expiry (a year by default, empty for never) and, if you like, the card number printed on your card and the customer who bought it. Press Sell.
2. Without a number, a 12-digit one is given. Give it to the customer: it is what they show to pay.
3. At the POS, press Pay, pick Gift card and type or scan the card number: what is left on it shows. Press Add payment to take it, up to what is due; the rest is paid another way.
4. On a sales invoice, add a payment row, pick Gift card as the method and type the card number: what is left on it shows under it.
5. The Cards tab lists every card with what was spent, its balance, expiry and state. The Report tab shows cards sold and spent over a period, by month, and what is still owed, with Excel and print.

Tips. Selling a card puts the money in Cash or Bank and in Gift cards outstanding, a liability. A sale paid with a card takes it from there, and the sale's VAT is charged as usual. The server checks every sale: an unknown, cancelled or expired card, or more than is left on it, is refused. A card nothing was spent from can be cancelled (Cancel card): its sale posting is removed, so give the money back. A returned sale is refunded in cash or to the bank, not back to the card.

07

Customer wallet

Add-on module

Store credit your customers can spend

Customers leave money with you in their wallet and spend it on later visits. Top up at the counter, take the wallet as a payment at the POS and on sales invoices, and refund returns into it instead of cash. Money in a wallet is booked as held for the customer, not as a sale, so no VAT until it is spent. Every receipt that used the wallet prints what is left, and clients see their balance in the client portal.

What you get

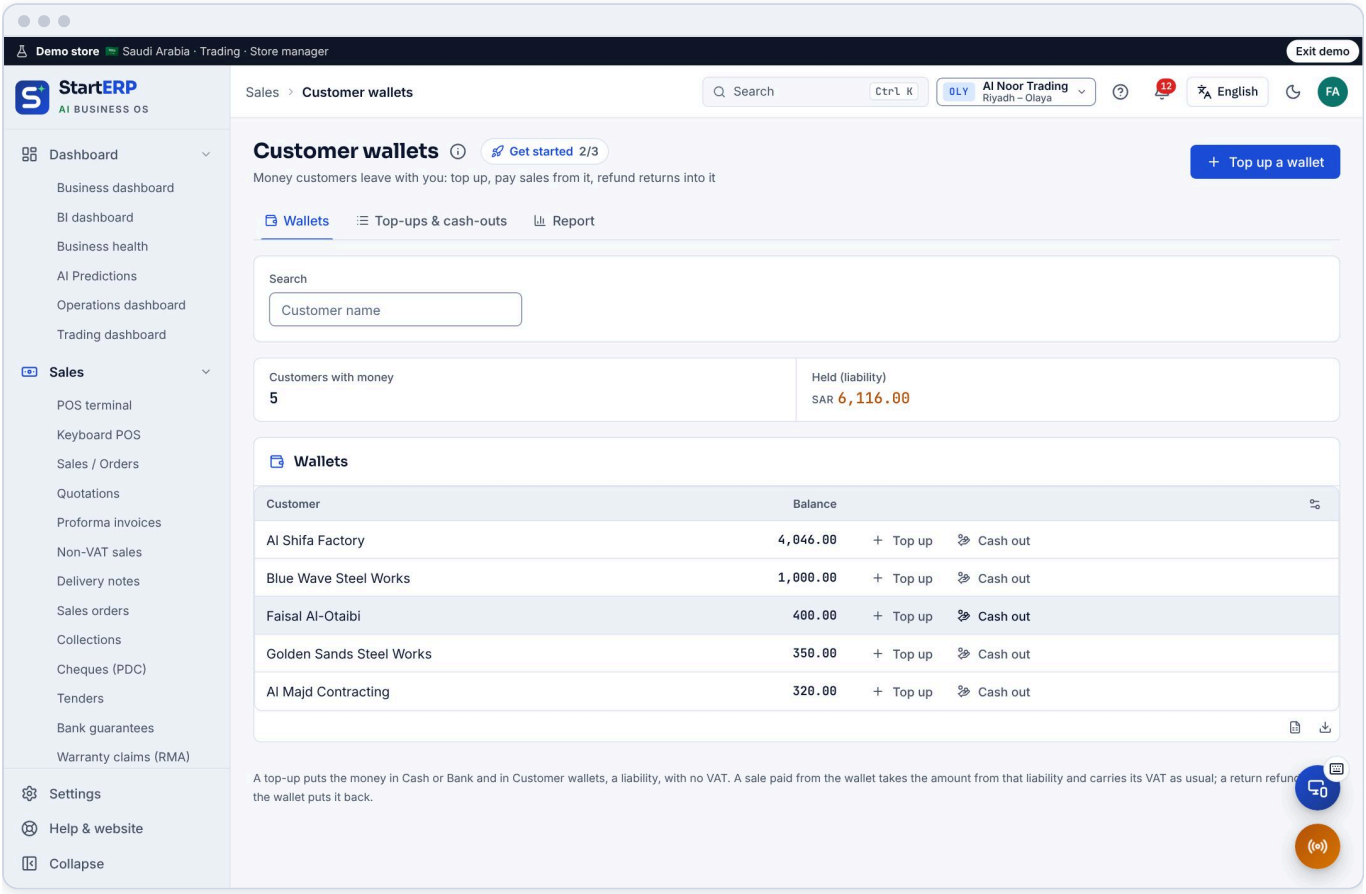
- Refunds stay in the shop
- Paid at the POS and on invoices
- Balance on every receipt
- Held money report

GET STARTED IN 3 STEPS

1. **Top up a wallet.** At the counter for a customer.
2. **Pay from the wallet.** At the POS or on an invoice.
3. **Check balances.** Customers see theirs in the portal.

Customer wallets

Keep money for a customer: they top up their wallet, pay later sales from it at the POS and on invoices, and returns can be refunded into it. Money in a wallet is held for the customer, not a sale: no VAT until it is spent. Part of the Customer wallet add-on.



Customer wallets

1. Open Sales → Customer wallets and press Top up a wallet (or Top up on the customer's page). Pick the customer, type the amount and how it was paid, and press Top up.
2. At the POS, pick the customer, press Pay and pick Wallet: what is in the wallet shows. Press Add payment to take it, up to what is due; the rest is paid another way.
3. On a sales invoice for a customer, add a payment row and pick Wallet as the method: the balance shows under it. On a sales return, pick Wallet to refund into the customer's wallet instead of cash.
4. Cash out gives money back from the wallet. The Top-ups & cash-outs tab lists them; Reverse undoes one while the wallet still holds it.
5. The receipt of a sale or return that used the wallet prints the wallet balance after it. The Report tab shows what was put in, refunded, spent and cashed out over a period, by month, with Excel and print.

Tips. The date cannot be in the future: it says when the sale, purchase, payment or entry happened, so the picker stops at now in your store's time (a few minutes of leeway for a device clock that runs fast). Due dates, valid-until, expected delivery and bookings can still be later. A top-up puts the money in Cash or Bank and in Customer wallets, a liability. A sale paid from the wallet takes it from there, and the sale's VAT is charged as usual. The server checks every sale: a walk-in, or more than is in the wallet, is refused. With the client portal, your clients see their wallet balance on its home page.

08

WhatsApp inbox

Add-on module

Every WhatsApp chat in one team inbox on your official number

Customers write to your official WhatsApp number and the chat lands in the inbox with their name, the open lead or job it belongs to and who is handling it. Reply by typing and pressing Enter inside the 24-hour window; after it, the composer offers your approved templates, and marketing ones go only to contacts who said yes. Assign a chat in one click, label it, keep internal notes the contact never sees, answer with canned replies, send a file and mark the chat closed when it is done. A chat becomes a lead in one click and every reply is logged on it. The inbox report shows chats, response times, messages by agent and what the templates cost, at Meta's rate with no markup.

What you get

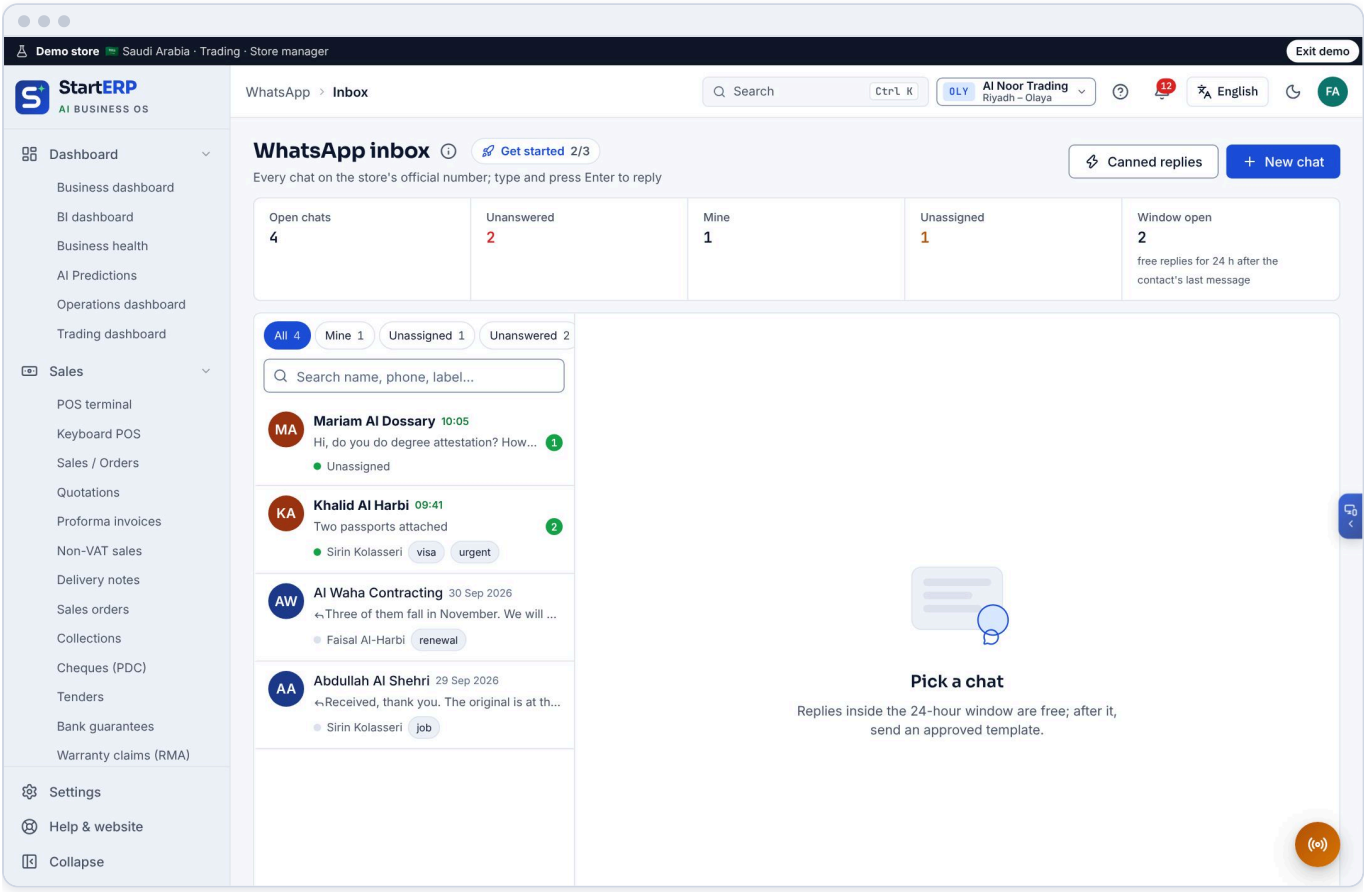
- One inbox for the team on the store's official number; unread badge under WhatsApp
- Type + Enter inside the 24-hour window; approved templates after it, marketing only with consent
- Assign, label, internal notes, canned replies and files; a lead from the chat in one click
- Response times, messages by agent and template cost by category at Meta's rate, no markup

GET STARTED IN 3 STEPS

1. **Connect your WhatsApp number.** Your official WhatsApp Business number.
2. **Save quick replies.** Answers your team sends often.
3. **Answer the first chat.** Assign, label and reply from one inbox.

WhatsApp inbox

Every chat on the store's official WhatsApp number in one shared inbox: who wrote, what they said, who is handling it and whether the 24-hour window is open. Reply by typing, pick a canned reply or send an approved template when the window has closed; attach a photo or PDF; keep internal notes the contact never sees. A chat links to the customer, the lead and the service job, can be assigned and labelled, and becomes a lead in one click. Meta's template charges are recorded per message at cost, with no markup. Part of the WhatsApp inbox add-on; the number itself is connected under Settings → WhatsApp.



WhatsApp inbox

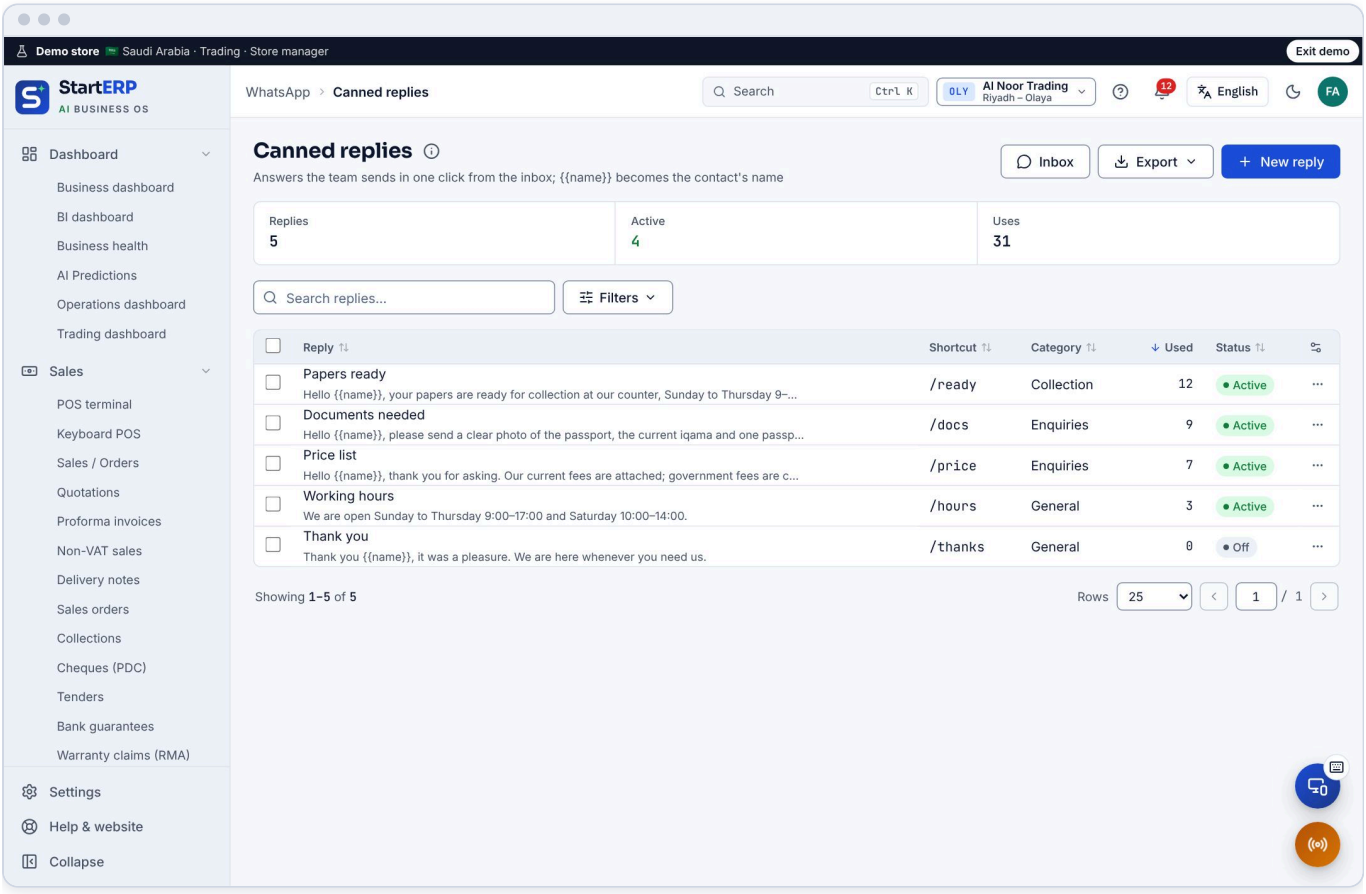
1. Open WhatsApp → Inbox. The list shows every chat with its last message, the unread count, who it is assigned to and a dot: green while the 24-hour window is open, grey once it closed, red when the contact opted out. The tabs keep All, Mine, Unassigned, Unanswered or Closed; search a name, number, label or message.
2. Open a chat: the messages with their ticks (sent, delivered, read), the links to the lead, customer or job, and the window line. Inside the window type and press Enter to reply; the paper clip attaches a photo or document.
3. Type "/" and a shortcut (for example /ready) then Enter, or pick one from the lightning menu: the canned reply fills the box with the contact's name in place of {{name}}; press Send.

4. Once the window has closed (24 hours after the contact's last message) only an approved template can go: pick it, fill its {{1}}, {{2}} values, check the preview and press Send template. A marketing template needs the contact's marketing consent, set under More → Consent.
5. The note icon next to the box writes an internal note: it shows in the chat with a yellow background and never reaches the contact.
6. Assign picks who handles the chat. More holds Labels, Make a lead (or opens the linked one), Link customer / lead / service job, the consent switches, the opt-out, Pin and Close chat. New chat starts a conversation with a number you type; the first message is a template.

Tips. A message to the store's number from a phone already on a customer or an open lead lands linked to them and assigned to the lead's owner; a new number gets a new chat named after the WhatsApp profile and a bell notification. A contact who writes STOP, "unsubscribe", "إلغاء" or "توقف" is opted out at once and nothing more can be sent until the opt-out is lifted under More. A template's cost appears on the message once Meta reports it delivered, at the rate card of the store's country converted to its currency; edit the rates under Settings → WhatsApp.

Canned replies

The answers the team sends from the WhatsApp inbox in one click: a title for the menu, the text that goes out, an optional /shortcut and a category. {{name}} becomes the contact's name. Each reply counts how often it was used. Part of the WhatsApp inbox add-on.



Canned replies

ON THE LIST

1. Open WhatsApp → Canned replies. Each row shows the title and the start of the text, the shortcut, the category, how often it was used and whether it is active.
2. Search a title or text, filter by category; press "New reply" to add one or a row to edit it.

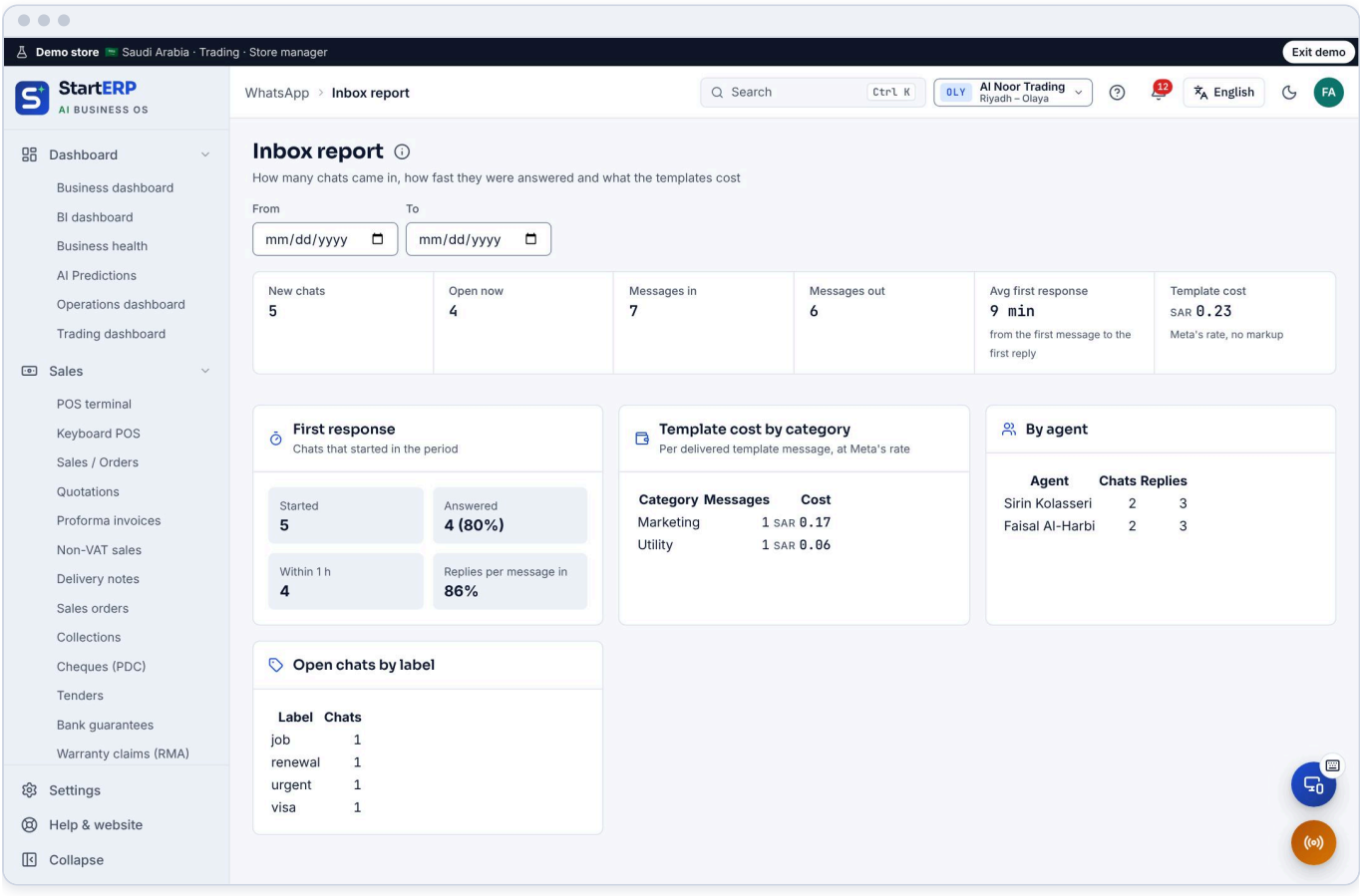
> **Tips.** The most used replies sit on top; an inactive reply stays here but leaves the inbox menu.

ON THE FORM

1. Type the title and the text (up to 1024 characters); write {{name}} where the contact's name should go. The preview below shows the result.
2. Optionally give a shortcut (letters, no slash: typing /ready in the inbox expands it) and a category for the menu; untick Active to hide it. Press Add reply.

Inbox report

How the WhatsApp inbox performed in a period: the chats that came in and are open, the messages in and out, how fast and how often the first message was answered, what the templates cost by category at Meta's rate (no markup), the work by agent and the open chats by label. Part of the WhatsApp inbox add-on.



Inbox report

1. Open WhatsApp → Inbox report. Blank dates cover every chat; set From and To to keep the chats and messages of those days.
2. The tiles count the new chats, the chats open now, the messages in and out, the average minutes to the first reply and the template cost.
3. First response: the chats that started in the period, how many were answered, how many within an hour and the replies per message in. Template cost by category: marketing, utility and authentication messages with what Meta charged.
4. By agent shows each person's chats and replies; Open chats by label shows what is waiting, by label.

> **Tips.** The report is computed on the server from the chats and messages themselves, so it matches the inbox tiles and the cost shown on each template message.

09

Token & counter

Add-on module

A calm waiting room: tokens, counters and a board that calls each visitor

Visitors take a token at the kiosk by the door or at reception, for the service they came for: typing, visas, payments, each with its own letter, so A-012 and B-004 never mix up. Senior citizens, people of determination and expecting mothers go ahead by the minutes you set, VIPs and appointments too. At each counter staff press Call next: the display board in the waiting area shows the number and announces it in English and Arabic. Recall, hold, transfer to another service or counter, mark served or not come; the customer's record and past visits are on the screen while you serve them, and the Invoice button bills the service without typing it again. Every served visit goes on the customer's page and their CRM lead, and the report shows how long people waited, how fast each counter served and your busy hours.

What you get

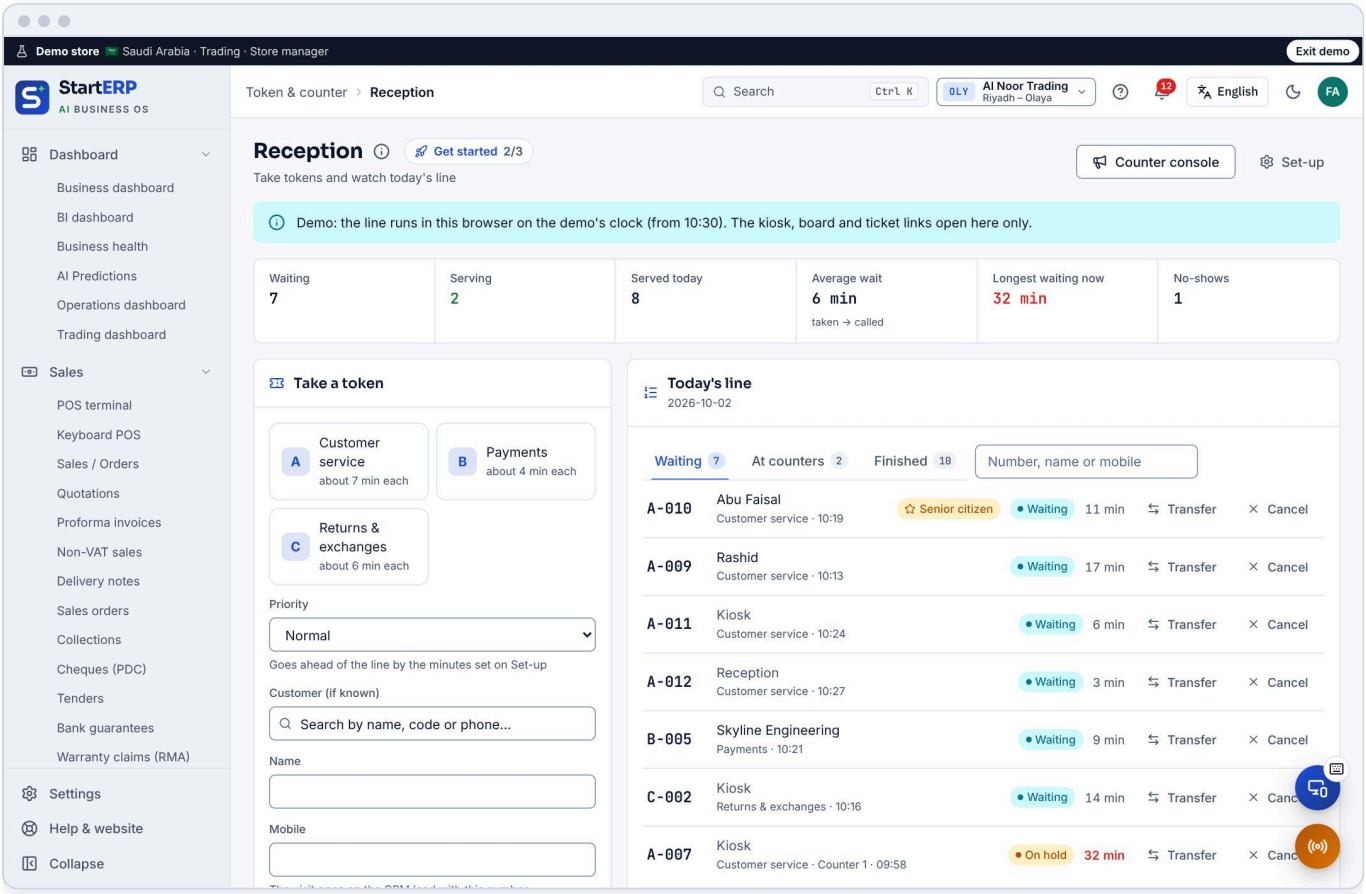
- Tokens per service from a kiosk or reception, with fair priority rules
- Counter console: call next, recall, hold, transfer, served, no-show
- A display board that shows and announces each call in English and Arabic
- The customer's record while serving, the visit in the CRM, an invoice in one click, and waiting-time reports

GET STARTED IN 3 STEPS

1. **Set up services and counters.** Each service gets its own letter.
2. **Open the kiosk and board.** Visitors take tokens; the board calls them.
3. **Call the next visitor.** Press Call next at your counter.

Reception: taking tokens

Give each visitor a token for the service they came for and watch today's line: who waits and for how long, who is at which counter and who was served. Tokens are numbered per service and per day (A-001, B-001, from 001 again tomorrow). Part of the Token & counter add-on.



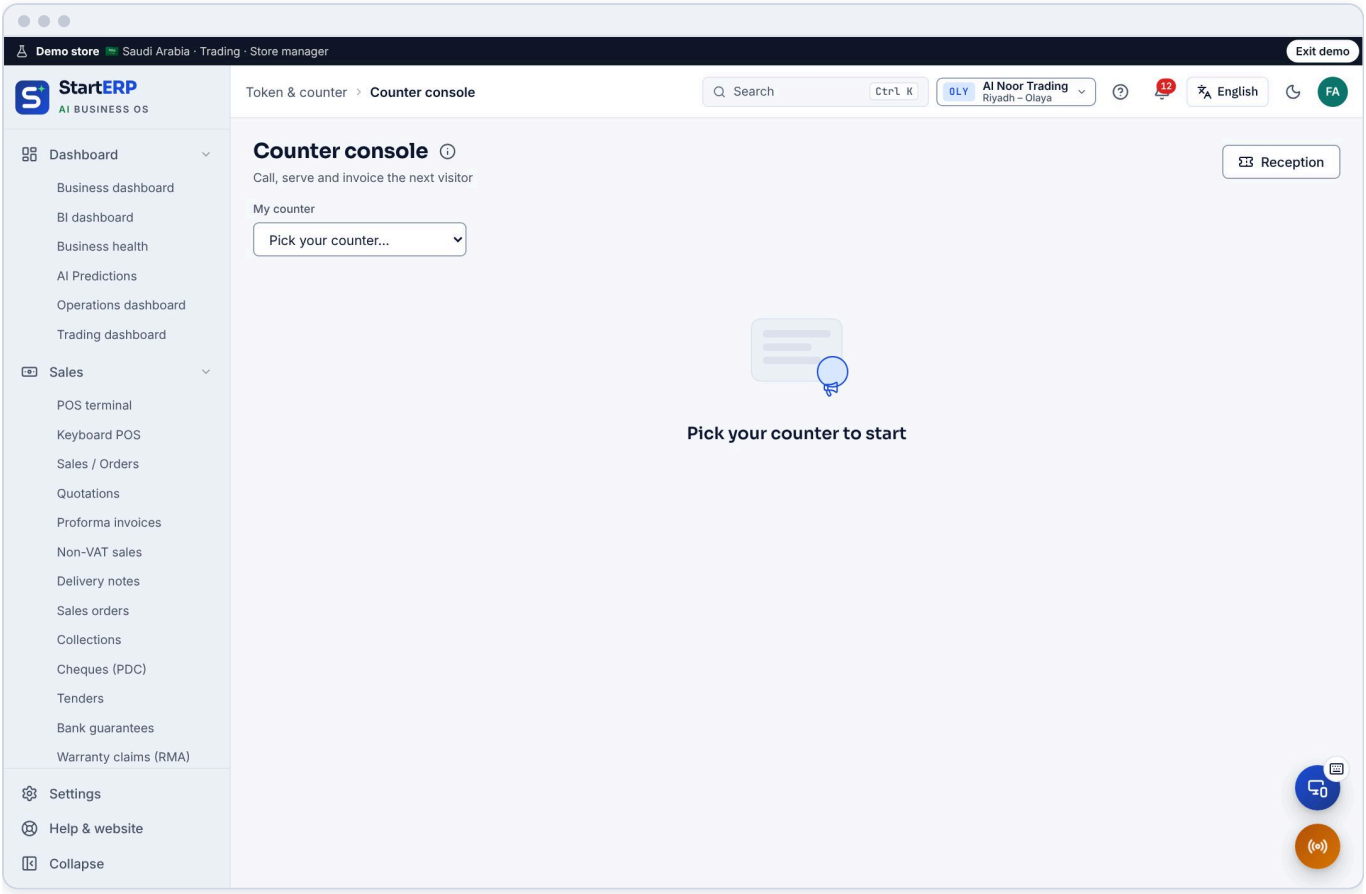
Reception: taking tokens

1. Open Token & counter → Reception and press the visitor's service, such as A · Typing & applications.
2. Pick the priority when it applies (senior citizen, people of determination, expecting mother, VIP or appointment): the token goes ahead by the minutes set on Set-up.
3. Pick the customer if they have a record, or type a name and mobile, then press Take token.
4. The ticket shows the number, how many are ahead and about how long it takes; press Print ticket. Its QR code opens the ticket's page, which shows the turn as it moves.
5. Today's line lists Waiting, At counters and Finished. Transfer sends a waiting token to another service or counter; Cancel ends it.

Tips. A mobile number on the token puts the visit on the CRM lead with the same number when it is served. A waiting time in red has passed 30 minutes. In a demo store the line runs in your browser on the demo's clock, which starts at 10:30.

Counter console

Call, serve and invoice the next visitor at your counter. The token being served shows big with Recall, Hold, Transfer, No-show, Invoice and Served; the customer's record and past visits are beside it and the line this counter calls next below. Part of the Token & counter add-on.



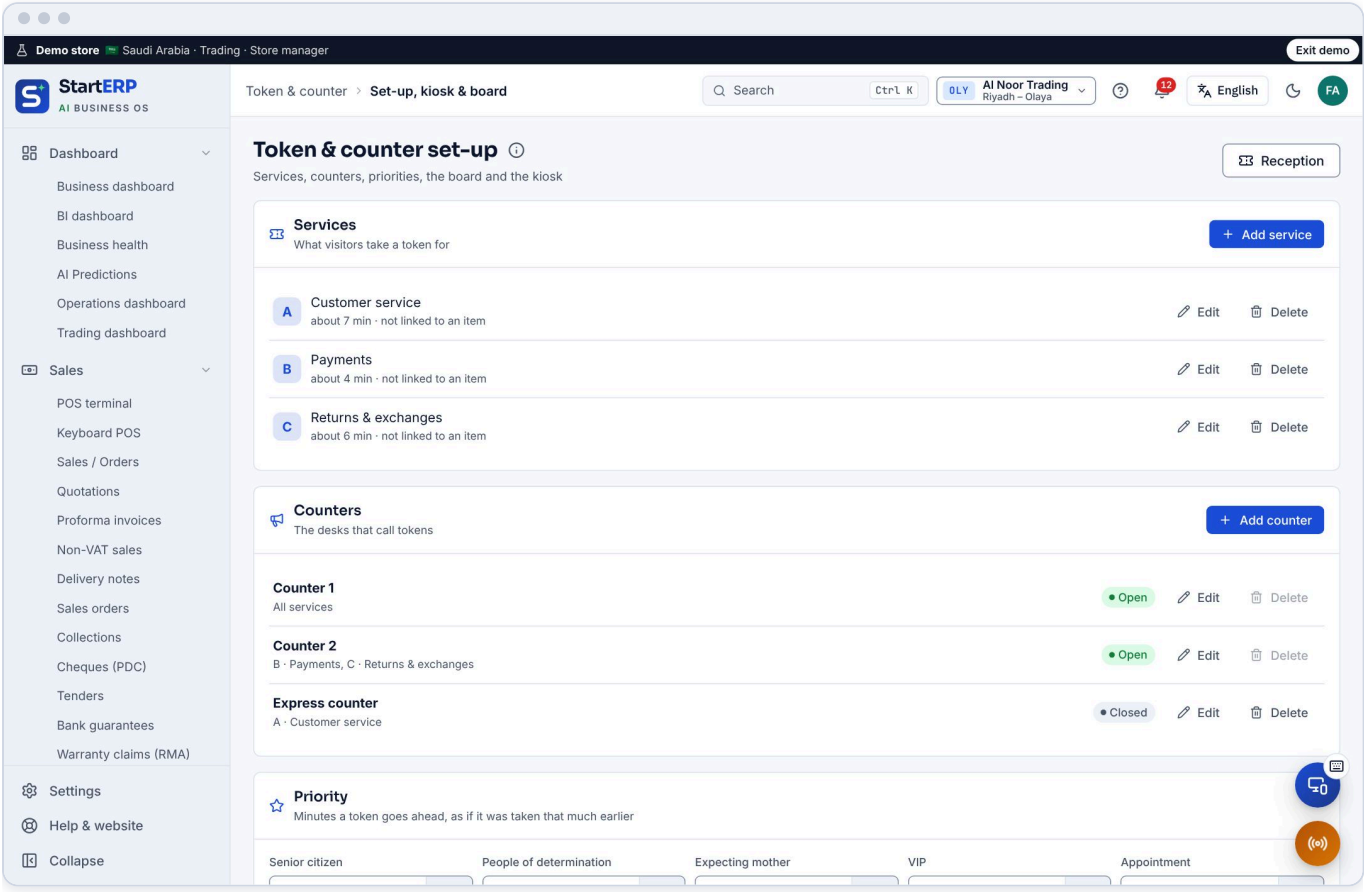
Counter console

1. Open Token & counter → Counter console and pick your counter. The browser remembers it.
2. Press Call next. The display board shows the number and announces it; the counter opens by itself.
3. Not here yet? Press Recall to announce it again, or Hold while they fetch a paper, and Resume when they are back.
4. Press Invoice to bill the service's item to the customer without typing it again, then Served. Served · call next does both in one press.
5. Transfer sends the visitor to another service or counter and keeps their place by the time the token was taken; No-show ends a token whose visitor did not come.

Tips. Tokens sent to your counter come first, then the fair order: the earliest token, with priority tokens counted as taken earlier. Close counter when you leave the desk; a counter serving a token cannot close until it is finished.

Token & counter set-up, kiosk and board

Set up the services visitors take tokens for (each with a letter, the average minutes a visit takes and the item it is invoiced as), the counters and the services each one calls, how many minutes each priority goes ahead, the board's announcement language and the ticket's note; and open the kiosk and the display board. Part of the Token & counter add-on.



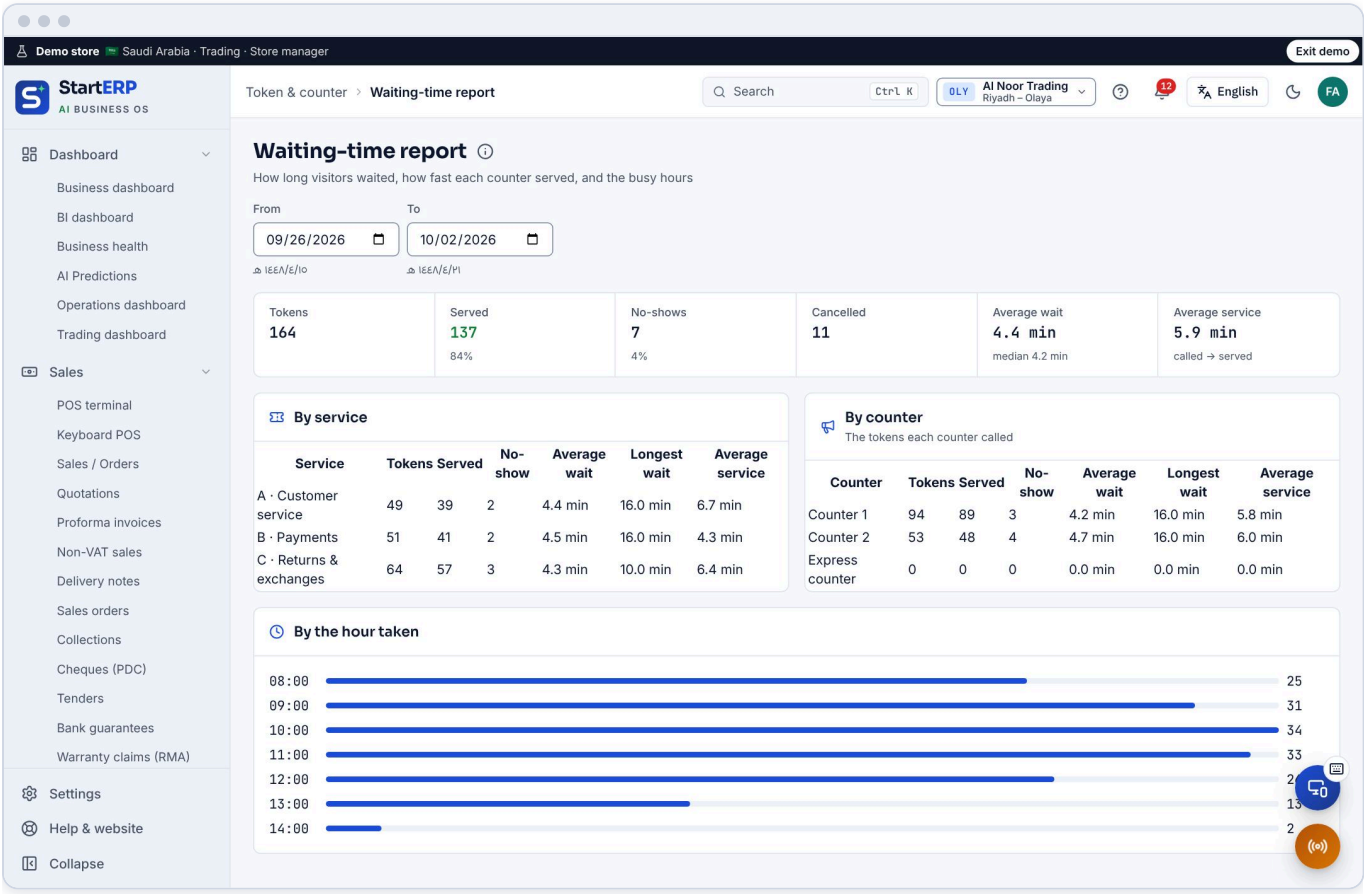
Token & counter set-up, kiosk and board

1. Open Token & counter → Set-up, kiosk & board and press Add service. Give it a name, a letter and the average minutes; link the item it is invoiced as.
2. Press Add counter for each desk and tick the services it calls; none ticked calls every service.
3. Under Priority set how many minutes each kind of visitor goes ahead, then Save priorities. Under Board and ticket pick the announcement language and the ticket's note.
4. Open the kiosk link on the tablet at the door and the display board link on the TV in the waiting area. On the board press Turn on announcements once, so it can speak.

Tips. New links issues new keys: the old kiosk and board links stop at once, for when a link was shared by mistake. At the kiosk visitors may choose senior citizen, people of determination or expecting mother; VIP and appointment are given at reception. In a demo store the kiosk and board open in the same browser tab with the demo's line.

Waiting-time report

For any period: the tokens taken, served, not come and cancelled; the wait from the token to the first call and the service time from the call to served, by service, by counter and by the hour the token was taken. Part of the Token & counter add-on.



Waiting-time report

1. Open Token & counter → Waiting-time report; it opens on the last seven days. Change From and To for another period.
2. The top line shows the tokens, the share served and not come, the average and median wait and the average service time.
3. By service and By counter show where people waited longest and which desk served fastest; By the hour taken shows the busy hours, amber when the average wait passed 20 minutes.

Tips. A counter's figures count the tokens it called, also those it then transferred.

Set-up, help and training

The StartERP team sets up your store, imports your products, customers and opening balances from Excel or CSV, and trains your users on the screens they use.

> **Need an add-on module?** Ask your StartERP contact to switch it on for your store, or write to **sirin@starterp.org** or WhatsApp **+966 50 197 1075**.

The full set of module guides

#	Guide
1	The basics every store has
2	Selling and documents
3	**Customers, CRM and loyalty (this guide)**
4	Restaurants and cafés
5	Purchasing and inventory
6	Finance and accounting
7	HR and payroll
8	AI, automation and reports
9	Online, integrations and control
10	Industry modules
11	Hospitals, clinics, pharmacies and opticians
12	Law firms
13	Hotels and resorts
14	Real estate agencies

All guides can be downloaded in StartERP under Help → User guides.



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