VODOO CRM

Product documentation · version 3

VODOO CRM Documentation

The reference for every module: fields, statuses, rules, limits, plans and roles.

Reference	Plans	Roles	API
17 chapters	Basic to Agency	10 roles	Keys and webhooks

Version 3 · October 2026
For owners, administrators and technical users.

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One chapter per page.

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Product overview

VODOO CRM is an all-in-one CRM for small businesses, agencies and coaches: contacts, sales, email and SMS, campaigns, automation, payments and courses in one workspace.

Modules

Module	What it covers	Plan
Dashboard	Month-to-date figures, recent deals, today's appointments, activity	All plans
Contacts	Customer records, tags, notes, consent, import and export	All plans
Pipeline	Deals on Kanban boards, stages, win and loss tracking	All plans
Conversations	Shared inbox for email and SMS replies	All plans
Broadcasts	One-off email or SMS campaigns to all contacts or by tags	Standard +
Workflows	Trigger-based automations with messages, waits and conditions	All plans
Analytics	Period reports: revenue, conversion, channels, email performance	Standard +
Funnels	Hosted pages with forms that create contacts	Standard +
Calendar	Appointments and a public booking page	All plans
Sales	Products, orders and Stripe payment links	Standard +
Reputation	Review requests and review tracking	All plans
Courses	Online courses with modules, lessons and learners	Pro +
Tasks	Assigned follow-ups with due dates and reminders	All plans
Settings	Organization, team, channels, integrations, billing, API	All plans
Agency	Client sub-accounts managed from one space	Agency

Organization-wide settings

Currency — Pipeline, dashboard, analytics, products and courses.

Time zone — Defines "today", month boundaries, reminders and alerts.

Brand name — Shown to your contacts in emails and public pages.

Contact language — English or French for booking, review, course and invitation emails.

All set in Settings › General.

Channels

Email — Sent by VODOO CRM on your behalf; replies come back to the inbox. Counted in the monthly quota.

SMS — Sent and received through your own Twilio account and number; billed by Twilio.

Interface language is personal (English or French); each member picks their own.

Accounts and access

How people get into a workspace, and what keeps them out when they should not be there.

Sign-up

Fields	Full name, company name, email, password.
Password	At least 8 characters.
Confirmation	An email link activates the account.
Google	“Sign up with Google” skips the password.
Next	A 5-step setup assistant, every step skippable.

Sign-in

Method	How it works
Email + password	Followed by a 6-digit code emailed at each sign-in.
Google	One click through your Google account.
Forgot password?	An emailed link to choose a new password.

Invitations and members

Topic	Rule
Who invites	Owner and administrators, from Settings › Team (or the setup assistant).
Seat	A valid invitation takes a seat on the plan; expired invitations don’t.
Expiry	Invitations expire; “Resend” issues a new link, “Revoke” cancels it.
Joining	The invitee signs up or signs in from the link and confirms their email.
Roles	Set at invitation, editable at any time.
Removing	A removed member is deactivated: access stops at once; they can be reactivated.

Free trial

Card	Not required.
Features	Standard plan features and limits.
Emails	500 per month.
Length	Until January 31, 2027 during the beta.
After	Data stays readable and exportable; creating needs a plan.

Suspended access

A deactivated member, or a member of a suspended organization, is refused at sign-in and on every page.

A client sub-account follows its agency: if the agency leaves the Agency plan, the client becomes read-only.

Documentation › Contacts

Contacts

The record everything else hangs off: conversations, deals, orders, tasks, appointments.

Where
Contacts

Plan
All · 500 / 5,000 / 50,000 contacts

Roles
Owner, Administrator, Closer, Community Manager, Marketer, Project Manager, Virtual Assistant

Fields

Field	Required	Notes
First name · Last name	Yes	Used by `{{contact.first_name}}` and `{{contact.full_name}}`.
Email	—	Needed for email. Unique per organization, case-insensitive.
Phone	—	Needed for SMS. International format, e.g. +1 555 010 0100.
Company · Source	—	Source: Manual, Import, API, Funnel, Online booking, Email, SMS, Pipeline.
Tags	—	Free labels; used by broadcasts, triggers and conditions.
Consent	—	Email and SMS opt-out state, with date and origin.

CSV import

Rule	Detail
Format	CSV; HubSpot, Pipedrive, Salesforce, Zoho presets map columns automatically.
Mapping	Each column maps to a field or is ignored.
Duplicates	Same email: empty fields are completed and tags added.
Rejected	Listed with their row number, to fix and re-import.
Consent	Optional box stamps date and origin on each contact.
Limit	Only new contacts count towards the plan limit.

Lifecycle

1. **Created**
   By hand, import, API, form, booking, incoming message or deal.
2. **Deleted**
   Gone from lists, searches, campaigns and workflows at once.
3. **Erased after 30 days**
   Personal data, conversations, notes and tags are wiped. Deals, orders and tasks stay, shown as “Deleted contact”.

Duplicates
Creating or editing a contact with an email already in use is refused, with a link to the existing record. Forms, bookings and the API complete the existing contact instead.

Consent
An SMS “STOP” opts out of texts, “START” opts back in. The email unsubscribe link opts out of email. Both can be set by hand on the record.

Documentation › Pipeline and deals

Pipeline and deals

Deals move through stages; one stage per pipeline can mark a deal won, one lost.

Where	Plan	Roles
Pipeline	All · Basic: 1 pipeline	Owner, Administrator, Closer

Deal fields

Field	Notes
Contact	Existing contact, or a new one created with the deal.
Company	Free text.
Value	In the organization's currency.
Probability	0 to 100%.
Stage	Any stage of the deal's pipeline.
Owner	An active team member, or unassigned.
Tags	Free labels.

Deal statuses

Status	Meaning
In progress	In an open stage.
Won	Reached the won stage; the win date is recorded.
Lost	Reached the lost stage.
Abandoned	Closed without an outcome.

Standard template — 7 stages

New Lead · Qualified · Appointment Booked · Proposal Sent · Negotiation · Won · Lost

Rules

Topic	Rule
Stage outcome	Open, won or lost. One won and one lost stage per pipeline; picking one moves the role.
Marking a stage won	Deals already in it become won, dated from when they entered the stage.
New stage	Inserted before the won stage; drag column headers to reorder.
Deleting a stage	Its deals are moved to the stage you choose.
Header total	Counts open deals only.
Inactive deals	Every Monday at 9 am (org time), the owner is notified of open deals unchanged for 7 days.
Orders	"Create an order" turns a deal into a sales order, linked both ways.

Documentation › Conversations

Conversations

One conversation per contact and channel, shared by the team.

Where	Plan	Roles
Conversations	**All plans**	**Owner, Administrator, Closer, Community Manager, Virtual Assistant**

Channels

	Email	SMS
Sending	By VODOO CRM, in your organization's name	Your Twilio account and number
Set-up	Sender name only; reply address created for you	Account SID, Auth Token, number, webhook URL
Replies	Arrive in the inbox, quoted history removed	Arrive in the inbox
Copy of replies	Optional forward to your usual mailbox	—
Billing	Monthly email quota of your plan	Billed by Twilio

Conversation statuses

Status	Meaning
Open	Needs attention; counted on the dashboard.
Snoozed	Set aside for later.
Closed	Handled; reopen at any time.

A conversation can be assigned to one member, marked as read, and searched by contact name or email.

Attachments

Limit	Value
Files per message sent	5
Size per file	10 MB
Size per message	20 MB
Files kept per email received	10
Blocked	Executable and script files

Threads

History	Latest 100 messages, "Older messages" loads more.
Failures	"Not sent" with the reason under the message.
Deleted contact	Conversation readable, replying disabled.
Quick replies	Welcome, follow-up, sales and closing templates.

Consent keywords

STOP	Opts the contact out of SMS.
START	Opts them back in.
Unsubscribe link	In every email; opts out of email.
Effect	Campaigns, workflows and review requests skip opted-out contacts.

Documentation › Broadcasts

Broadcasts

Standard and up

A single personalized email or SMS sent to all contacts or to contacts with selected tags.

Where	Plan	Roles
Broadcasts	**Standard, Pro, Agency**	**Owner, Administrator, Community Manager, Marketer**

Campaign fields

Field	Notes
Channel	Email or SMS (the channel must be set up).
Name	Internal only.
Subject	Email only; variables allowed.
Message	Variables allowed. SMS: 1,600 characters max.
Audience	All contacts, or contacts with any of the selected tags.
Test	“Send me a test” (email).

Audience rules

Maximum	5,000 reachable recipients per campaign; narrow with tags above that.
Excluded	Opted-out contacts, and contacts without email or phone.
Re-checked	At send time: a contact who opts out after creation is still skipped.
Shown	Real recipient count before you confirm.

Campaign statuses

Queued · Sending · Completed · Failed · Canceled

“Cancel campaign” stops pending sends; sent messages stay sent.

Recipient statuses

Pending · Sent · Delivered · Failed · Unsubscribed · No address · Not sent (canceled)

SMS rules

Segments	160 characters per SMS, 70 with accents or emoji.
STOP notice	Added when the message does not mention STOP.
Hours	Monday to Saturday, 8 am to 8 pm; outside them, sending waits.
Tracking	Delivered and failed.

Monthly email quota

Plan	Emails / month
Trial	500
Basic	2,000
Standard	10,000
Pro	50,000
Agency	100,000 pooled

Counted per recipient across campaigns, workflows and one-to-one emails; resets each calendar month. Usage: Settings › Billing.

Documentation › Workflows

Workflows

A trigger enrolls a contact; steps then run in order, with waits and branches.

Where	Plan	Roles
Workflows	**All · 5 / 25 / 100 active**	**Owner, Administrator, Marketer, Project Manager**

Triggers

Trigger	Optional filter
Form submitted	Any form, or one form
Message received	Email or SMS, Email only, SMS only
Tag added	Any tag, or one tag
Pipeline stage	Any stage, or one stage
Manual	Started from a contact or by “Test”
Without filter	Payment received, Appointment booked, Contact created, Webhook

Steps

Step	Settings
Send Email	Subject, body
Send SMS	Message
Wait	Minutes, hours, days, weeks
Condition	Field, operator, value → Yes / No
Add / Remove Tag	Tag name
Create Task	Title, due in N days
Change Stage	Target stage
Enroll in Workflow	Target workflow
Review Request	Platform
Send Webhook · Pro +	URL, method, JSON body

Conditions and safeguards

Fields Email, phone, first name, last name, company, source, tag, pipeline stage.

Operators equals, not equals, contains, does not contain, greater than, less than, exists, does not exist.

Matching Case and spaces ignored; an empty branch ends the run.

Safeguards “Message received” fires at most once per 24 h per contact, never on STOP or auto-replies. Webhooks need public HTTPS and time out after 8 s.

Variables

Variable	Value
`{{contact.first_name}}`	First name
`{{contact.full_name}}`	Full name
`{{contact.email}}`	Email
`{{contact.phone}}`	Phone
`{{contact.company}}`	Company
`{{org.name}}`	Brand name
`{{message.subject}}`	Email subject

Runs and logs

Item	Values
Run status	In progress · Completed · Failed · Cancelled (contact deleted, workflow turned off or deleted).
Step result	Success · Skipped · Failed, with its reason (opted out, no email, quota reached…).

Calendar and tasks

Appointments with a public booking page, and tasks with reminders.

Appointment fields

Field	Notes
Title	Required.
Date · start · end	End must be after start.
Contact	Optional link to a contact.
Place or video link	A link shows a “Join” button.
Notes	Internal.
Status	Scheduled, Confirmed, Completed, Cancelled, No show.

Booking page

Address vodoocrm.com/book/your-link

Settings Name shown, time zone, buffer, availability per weekday, on/off.

Slots Only free slots inside your availability can be booked.

Contact Created, or completed if the email exists.

Emails Confirmation with .ics, reminder 24 h before, cancel and reschedule links.

Trigger “Appointment booked” workflows start.

Calendar views and sync

Views Month, Week, Day, List.

Dashboard “Today’s appointments” excludes cancelled ones.

Google Calendar Connected in Settings › Integrations; pushes your upcoming appointments.

Task fields

Field	Values
Title · description	Title required.
Due date	Day, in the organization’s time zone.
Priority	High, Medium, Low.
Owner	Active members only.
Contact	Optional.

Task statuses and reminders

To do · In progress · Done · Overdue

Assigned The owner is notified.

Due today Reminder at 8 am, organization time.

Sources Tasks page, contact record, “Create Task” step.

Documentation › Funnels

Funnels

Standard and up

Hosted pages made of blocks; their forms create or complete contacts.

Where	Plan	Public address
Funnels	Standard, Pro, Agency	vodoocrm.com/f/your-address

Blocks and their properties

Block	Properties
Hero Section	Title, subtitle, button text
Text	Main text
Image	Image URL, alternative text, caption
Video	Video URL, title
Form	Form title, fields (comma-separated), button text
Testimonial	Name, role or company, testimonial, rating 1–5
Call to Action	Main text, button text, target URL (empty = the page's form)

Publishing

States	Draft or Published.
Saving	Automatic; an indicator flags unsaved changes.
Preview	Identical to the public page; nothing is sent or counted.
Deleting	Form responses are kept and contacts stay.
Plan change	Without Funnels in the plan, published pages stay online but can't be edited.

Metrics

Metric	Definition
Views	Visits to the funnel's pages.
Submissions	Forms submitted.
Conversion	Leads ÷ views.
Total views	Across all funnels.

On submission

Each submission creates the contact, or completes the one with the same email (no duplicate), stores the response, and starts "Form submitted" workflows.

Documentation › Sales

Sales

Standard and up

A catalog, orders, and online payment through your own Stripe account.

Where	Plan	Roles
Sales	**Standard, Pro, Agency**	**Owner, Administrator, Accountant/Member**

Product fields

Field	Notes
Name	Required.
Price · currency	Required.
Description	Optional.
Recurring product	Monthly subscription.
Active	Inactive products can't be ordered.

A product already used in an order is deactivated instead of deleted.

Order fields

Field	Notes
Customer	A contact.
Products	With quantity and unit price; one currency per order.
Status	See below.
Notes	Internal.
Deal	Set when created from a deal.

Order statuses

Status	Meaning
Pending	Awaiting payment.
Paid	Paid in full — set automatically by Stripe or by hand.
Part. paid	Partially paid.
Refunded	Refunded.
Cancelled	Cancelled.

Payment link flow

1. **Connect Stripe**
   Settings › Integrations: publishable and secret keys of your Stripe account.
2. **Send the order's payment link**
   "Copy payment link" on the order.
3. **Customer pays on Stripe**
   Card data never goes through VODOO CRM.
4. **Order set to Paid**
   "Payment received" workflows start; a paid course enrolls the buyer.

Figures

Total revenue, number of orders, average order and paid orders head the page; orders export to CSV.

Reputation and courses

Collecting reviews on all plans; selling and running courses from Pro.

Review requests

Item	Detail
Platforms	Google, Facebook, Trustpilot, Tripadvisor, Yelp, Other.
Set-up	One review page URL per platform.
Sending	To one or more contacts, by email; also a workflow step.
Skipped	Contacts without email or opted out.

Sending · Sent · Clicked · Not sent

Reviews and metrics

Review	Rating, text, date, platform, contact or author name.
Entry	Added by hand from the reviews you receive.
Average rating	Out of 5, from recorded reviews.
Click rate	Share of requests whose link was opened.
Not sent	Reason shown: no email, opted out, quota reached...

Courses — structure

Level	Content
Course	Title, description, access (Free or Paid with a price), Draft or Published.
Module	A titled group of lessons; reorder with Move up / Move down.
Lesson	Video (URL), Text or Audio (URL); duration in minutes; notes or transcript.

Learners

Enroll	“Enroll a contact”; the access link is emailed or copied.
Paid courses	Buyers are enrolled when their order is paid.
Progress	Lessons completed out of the total.
Access	“Resend link” or “Remove access” (the link stops working).

Availability

Plan	Pro and Agency.
Draft	Learners see “coming soon” until published.
Figures	Enrolled learners and sales collected per course.

Dashboard and analytics

What each number means, and what it is compared with.

Dashboard — current month

Card	Definition	Compared with
Total Contacts	All contacts	Growth since the 1st of the month
Active Conversations	Open conversations	—
Deals won this month	Value of deals won since the 1st	Same date last month
Sales collected this month	Paid orders since the 1st	Same date last month
Conversion Rate	Deals won ÷ deals created	Same date last month
Revenue Trend	Deals won and sales collected, last 12 months	Previous 12 months

Each role sees only the cards of its modules. Days and months follow the organization's time zone.

Analytics — chosen period (7, 30 or 90 days)

Block	Definition
Won deal value	Sum of deals won in the period.
New contacts · Deals won	Counts in the period.
Conversion	Deals won ÷ deals created; never above 100%.
Revenue trend	Deals won and sales collected per month.
Pipeline funnel	Open and won deals per stage of the selected pipeline.
Acquisition channels	New conversations per channel.
Email performance	Sent, delivered, opened, clicked, bounced.
Top contacts	Value of deals won per contact in the period.
Recent conversions	Latest deals won in the period.

Trends compare with the previous period of the same length. "Export" downloads every block as CSV. Analytics is available from the Standard plan.

Settings

Owner and administrators only; other roles see their display language.

General

Field	Notes
Logo	PNG, JPG, SVG or WebP, 2 MB max.
Organization · brand name	Brand name is shown to contacts.
Website	Optional.
Time zone · currency	See Product overview.
Date format	DD/MM/YYYY, MM/DD/YYYY, YYYY-MM-DD, DD MMM YYYY.
Languages	Interface (per member) and messages to contacts.
Delete organization	Type the confirmation word; refused while a subscription is active.

Channels

Channel	Fields
Email	Sender name; reply address (read-only); optional copy of replies.
SMS	Twilio Account SID, Auth Token, number; webhook URL to paste in Twilio.
Test connection	Checks the credentials.
Removing	A channel with conversations can't be deleted — deactivate it.

Integrations

Integration	What it does	Plan
Stripe	Payment links and automatic "Paid" orders (Sales: Standard +).	All
Google Calendar	Pushes upcoming appointments to your Google calendar.	All
Notion	Exports contacts to a Notion database.	All
Zapier · Make · n8n	Sends CRM events (contact created, deal won…) to your scenarios.	Pro +

White label — Agency

Brand	Name, logo, favicon, primary and secondary colors.
Subdomain	yourname.vodoocrm.com.
Custom domain	crm.your-agency.com via a CNAME record (DNS only).
Outgoing emails	Sender name and address.

Billing

Plans	Monthly or annual; change or cancel any time.
Usage	Contacts, members, active workflows, emails this month.
Payment	Card and invoices in the Stripe portal.
Agency clients	Covered by the agency; nothing to pay.

Documentation › API and webhooks

API and webhooks

Pro and up

Connect VODOO CRM to your own tools: a REST API for contacts and signed outgoing webhooks.

Where	Plan	Access
Settings › API & Webhooks	Pro, Agency	Owner and administrators

API keys

Auth	Bearer token in the Authorization header.
Scopes	`contacts:read`, `contacts:write`.
Display	The key is shown once, at creation.
Revoke	Calls using it stop immediately.
Last used	Shown for each key.

Endpoints

Method	Path	Scope
GET	`/api/v1/contacts`	`contacts:read`
POST	`/api/v1/contacts`	`contacts:write`

POST with an email that already exists completes that contact and returns it.

Outgoing webhooks

Event	Sent when
`contact_created`	A contact is created.
`contact_updated`	A contact is edited.
`deal_created`	A deal is created.
`deal_stage_changed`	A deal moves to another stage.
`deal_won`	A deal is won.
`appointment_booked`	An appointment is booked.
`order_created` · `payment_received`	An order is created · paid.
`message_received`	A contact writes in.
`form_submitted` · `funnel_submitted`	A form is submitted.

Signature
Each delivery is a POST signed with HMAC-SHA256 using the webhook's signing secret, to an HTTPS address. Check the signature before trusting the payload.

Plan change
If the plan no longer includes the API, keys stop working and nothing is sent; they can still be revoked or deleted.

Plans and limits

Four plans, monthly or annual, no commitment.

Plans

	Basic	Standard	Pro	Agency
Monthly price	$29	$69	$129	$249
Annual price (per month)	$23	$55	$103	$199
Contacts	500	5,000	50,000	50,000
Users	3	10	25	25
Active workflows	5	25	100	100
Pipelines	1	Unlimited	Unlimited	Unlimited
Emails per month	2,000	10,000	50,000	100,000 pooled
Contacts, pipeline, conversations, calendar, reputation, tasks	●	●	●	●
Workflows with conditions (If/Else)	●	●	●	●
Dashboard (basic analytics) · CSV export	●	●	●	●
SMS via your Twilio account	●	●	●	●
Broadcasts, funnels, sales, advanced analytics	—	●	●	●
Courses (LMS)	—	—	●	●
API & Webhooks · Zapier, Make, n8n	—	—	●	●
Advanced roles (Closer, Marketer…)	—	—	●	●
White label · one subscription for all sub-accounts	—	—	—	●
5 client sub-accounts (Standard plan) with usage tracking	—	—	—	●
60-minute kickoff session	—	—	—	●
Support	Email	Email	Priority	Priority
Availability target	99.5%	99.5%	99.5%	99.5%

How limits apply

Creation only Reaching a limit blocks new items; existing data stays usable.

Members Valid pending invitations count; expired ones don’t.

Workflows Only active workflows count.

Warning Billing flags a limit that is close.

Trial and expiry

Trial Standard features and limits, 500 emails a month.

Expired Read and export only until a plan is chosen.

Agency clients Standard plan, covered by the agency.

Prices US dollars, excluding tax.

Documentation › Roles and permissions

Roles and permissions

A role decides which modules a member sees and can act in; the server enforces the same rules.

Module access

	Dashboard	Contacts	Pipeline	Conversations	Broadcasts	Workflows	Analytics	Funnels	Calendar	Sales	Reputation	Courses	Tasks	Settings
Owner	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Administrator	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Closer Pro +	●	●	●	●	—	—	—	—	●	—	—	—	●	—
Community Manager Pro +	●	●	—	●	●	—	—	—	—	—	●	—	—	—
Editor/Graphic Pro +	●	—	—	—	—	—	—	●	—	—	—	●	—	—
Marketer Pro +	●	●	—	—	●	●	●	●	—	—	—	—	—	—
Graphic Designer Pro +	●	—	—	—	—	—	—	●	—	—	—	●	—	—
Project Manager Pro +	●	●	—	—	—	●	—	—	●	—	—	—	●	—
Virtual Assistant Pro +	●	●	—	●	—	—	—	—	●	—	—	—	●	—
Accountant/Member	●	—	—	—	—	—	●	—	—	●	—	—	—	—

Dashboard · Contacts · Pipeline · Conversations · Broadcasts · Workflows · Analytics · Funnels · Calendar · Sales · Reputation · Courses · Tasks · Settings

Role summary

Role	Typical use
Owner · Administrator	Everything, including Settings, billing, team and channels.
Closer	Selling: contacts, pipeline, conversations, calendar, tasks.
Community Manager	Inbox, campaigns and reviews.
Marketer	Campaigns, workflows, funnels and analytics.
Project Manager · Virtual Assistant	Coordination: tasks, calendar, contacts (+ workflows or inbox).
Editor/Graphic · Graphic Designer	Content: funnels and courses.
Accountant/Member	Figures: analytics and sales.

Availability

Owner, Administrator and Accountant/Member are included in every plan; the other seven roles come with Pro and Agency. Only the owner can delete the organization.

Glossary and support

The words used across VODOO CRM, and where to get help.

Glossary

Term	Meaning
Organization	Your workspace: its contacts, team, settings and plan.
Member	A person of your team with a role.
Contact	A customer or prospect.
Deal	A sales opportunity in a pipeline.
Broadcast	A one-off campaign to many contacts.
Workflow · run	An automation · one contact going through it.
Funnel	Hosted pages with forms.
Sub-account	A client organization managed by an agency.
Opt-out	A contact's refusal of email or SMS; always respected.

Common issues

Message	Meaning
"Monthly email quota reached"	Upgrade, or wait for the 1st of the month.
"Set up your SMS channel first"	Settings › Channels › SMS.
Step "Skipped"	Read its reason: opted out, no email, no number...
"URL refused: public HTTPS required"	Webhooks need a public https:// address.
A module is missing	Your role or plan doesn't include it.

Support

Email contact@vodoocrm.com

In the app Assistant (instant AI answers) and Feedback, on the right edge.

Agency clients Your agency answers you.

Also available

User Guide Step-by-step, in English and French.

Where vodoocrm.com, "Resources" footer.