



Octavion

User Manual

The complete guide to your business platform —
ERP, CRM, Call Center, HR and more.

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01

MODULE 01

Getting Started

8 topics in this module:

- Introduction to Octavion
- Creating and Configuring Your Workspace
- The Workspace Launcher and App Tiles
- The Desk Layout and Navigation
- Global Search and the Command Palette
- User Roles and Access
- Making Octavion Yours: Menu Order, Chart Boa...
- Your First 30 Minutes: A Quick-Start Checkli...

Introduction to Octavion

Updated 2026-07-17

Octavion is an all-in-one business platform that brings the tools your company runs on into a single, connected environment. Instead of juggling separate systems for finance, sales, telephony, and people management, you sign in once and move between every part of your operation from the same place, with shared data and a consistent interface.

What Octavion includes

Octavion is organized into a set of independent products that work together, and you open each one from its tile in your Workspace:

- Smart ERP — accounting, invoicing, inventory, purchasing, sales orders, and the day-to-day financial backbone of your business.
- Advanced CRM — a dedicated system for leads, deals, contacts, and organizations so your sales team can track every opportunity through to close, with built-in email and WhatsApp outreach through the official WhatsApp Business Platform (by Meta).
- Call Center — inbound and outbound calling, queues, call history, recordings, voicemail, campaigns, and agent tools for teams that talk to customers by phone. It now also includes an AI voice assistant that supports agents live on calls, a visual Call Flow designer for business hours, greetings, IVR menus, callbacks, and after-hours voicemail, a shared Phone Book that puts real names on every number, and WhatsApp campaigns and inboxes through the official WhatsApp Business Platform (by Meta).
- Octavion HR — employee records, attendance, leave, and salary workflows that keep your workforce running.
- e-Invoicing — compliant electronic invoicing generated from your Sales and Purchase Invoices.
- Octavion Chat — live chat for your website, so visitors can start a conversation with your team the moment they land on your page.

Each product is sold and licensed independently, so you only pay for and see the products your organization actually uses. When you subscribe to a new product later from **Add more apps** in your Workspace, its tile appears automatically alongside the ones you already have.

Why one platform matters

Because everything lives on the same platform, information flows without re-entry. A customer created in Advanced CRM can become a billing account in Smart ERP; a caller in the Call Center becomes a CRM lead in one click, and their calls are logged on the record automatically; an employee in Octavion HR is the same person who has a login and permissions everywhere else. This eliminates duplicate data, reduces manual errors, and gives leadership one accurate picture of the business.

Who uses Octavion

Octavion is built for growing companies that want enterprise-grade capability without stitching together multiple vendors. Finance teams manage the books, sales teams manage pipeline, support and telesales teams manage calls and messages, and HR teams manage people — all under one login, one bill, and one set of security controls.

How you access it

Octavion runs entirely in your web browser. Each organization gets its own secure Workspace at a private web address, and your data is isolated from every other customer on the platform. There is nothing to install: you open your Workspace, sign in, and select a product tile to start working.

Your Workspace is the one-login hub for everything. From there you launch Smart ERP, Advanced CRM, Call Center, Octavion HR, e-Invoicing, and Octavion Chat, and you manage your account, team, seats, and subscriptions from **Settings**.

Where to go next

The rest of this Getting Started guide walks you through opening your Workspace, learning the interface, understanding roles and permissions, personalizing your menus and dashboards, and completing the essential setup so your team can be productive on day one. If you are brand new, the *First 30 Minutes* article at the end of this section is the fastest path to a working setup.

GETTING STARTED

Creating and Configuring Your Workspace

Updated 2026-07-17

Your workspace is your organization's private home on Octavion. It holds your company data, your users, and the products you have subscribed to. Setting it up correctly at the start saves time later, because company details you enter here flow into invoices, reports, employee records, and customer communications across every product.

Creating your workspace

You create a workspace during sign-up. After you choose your plan and complete payment, Octavion provisions a dedicated, isolated environment for your company and sends you a link to your workspace along with your administrator sign-in details.

- Open the workspace link from your welcome email.
- Sign in with the administrator email and password you set during sign-up.
- The first-run setup wizard opens automatically the first time you enter an unconfigured workspace.

Completing the setup wizard

The setup wizard walks you through the essentials step by step. Complete each screen carefully — this is the foundation for everything else:

- Company profile — legal company name, country, default currency, and time zone. The currency and country set your tax and financial defaults, so choose them deliberately.
- Branding — upload your logo and set the company name that appears on documents your customers see, such as invoices and quotations.
- Fiscal settings — your financial year start and end dates, which control how accounting periods and reports are calculated.
- Administrator account — confirm the primary admin user who will manage the workspace and invite others.

You can revisit and change any of these later, but setting them accurately now prevents rework in your reports and documents.

Configuring core defaults

After the wizard, open **Settings** from your Workspace to fine-tune how your account behaves:

- In Profile, set your name, language, and time zone so that schedules, dates, and communications read naturally for you.
- In Notifications, choose how Octavion keeps you informed about activity across your products.
- In Subscription & Billing, confirm that every product you subscribed to — Smart ERP, Advanced CRM, Call Center, Octavion HR, e-Invoicing — is active, and review its per-seat price.

Company-wide financial defaults such as currency and fiscal year come from the setup wizard. You can adjust document and accounting details later inside each product's own screens — for example, in Smart ERP under **Accounting**.

Inviting your team

Once the company profile is in place, invite your colleagues from **Settings** → **Team & Seats**. Enter each person's email, assign the appropriate role, and Octavion sends them an invitation to set their own password.

Adding a user requires an available paid seat. If every seat is taken, the invite is blocked until you buy a seat or upgrade — you can do that from **Subscription & Billing**.

Only invite users to the products they need. Roles and access are covered in detail later in this guide, and you can manage them under **Settings** → **Roles & Permissions**.

Verify before you launch

Before rolling the workspace out to your team, take a few minutes to confirm everything looks right:

- Open Smart ERP from your Workspace and create a draft Sales Invoice to check that your company name and logo appear correctly on a customer-facing document.
- Confirm the currency and fiscal year shown on that document match what you set in the wizard.
- Check that every product you subscribed to appears as a tile on your Workspace.

A few minutes of verification now avoids corrections after real data starts flowing.

GETTING STARTED

The Workspace Launcher and App Tiles

Updated 2026-07-17

The Workspace is the home screen you land on after signing in, at app.octavion.ae/workspace. It presents each Octavion product as a large, clickable tile, giving you a single hub from which to open any part of the platform. Think of it as the front door to your whole operation.

Understanding the tiles

Each tile represents one product your organization has subscribed to — Smart ERP, Advanced CRM, Call Center, Octavion HR, or e-Invoicing. A tile shows the product name and icon, and clicking it takes you directly into that product. You only see tiles for the products you are licensed for and permitted to use, so the Workspace stays clean and relevant to your role.

- Smart ERP opens the finance, sales, inventory, and operations workspace.
- Advanced CRM opens your dedicated pipeline and contact management tools — Leads, Deals, Contacts, and Organizations.
- Call Center opens the calling console, with your Dashboard, Calls history, Extensions, Queues, and campaigns.
- Octavion HR opens employee, attendance, and leave management.
- e-Invoicing opens its dashboard, where invoices generated from your Sales and Purchase Invoices are tracked as Reported, Success, or Failed.

Why the launcher exists

Because Octavion products are independent but connected, the Workspace gives you one consistent starting point instead of separate bookmarks and logins. You sign in once, and moving between products never asks you to authenticate again — your session carries across every tile. This single sign-on keeps navigation fast and secure.

Add more apps

The Workspace also includes an **Add more apps** area. This is where products you have not yet subscribed to appear, so you can see at a glance what else Octavion offers. If your business grows into needing, for example, Call Center or Octavion HR, you can subscribe to it here, and once it is activated a new tile appears automatically on your Workspace.

Navigating from the launcher

Sign in to arrive at your Workspace. Click the tile for the product you want to work in. To switch products, return to the Workspace at any time using your Workspace home link in the top navigation. Every product — Smart ERP, Advanced CRM, Call Center, Octavion HR, and e-Invoicing — opens from its own tile, so the Workspace is always your central junction between them.

What you will and won't see

The tiles on your Workspace are shaped by two things: your organization's subscription and your personal permissions. If a colleague sees a tile you don't, it usually means they have been granted access to a product you have not — an administrator can adjust this in **Settings** under **Roles & Permissions**. If your whole company is missing a product, it has not been added to your subscription yet, which you can review under **Settings** → **Subscription & Billing**.

Personalizing your view

The Workspace is designed to stay simple, but your most-used product is only one click away every time you sign in. Many users bookmark the specific product they live in day to day, while keeping the Workspace handy for the moments they need to cross into another part of the business. Whichever you prefer, the Workspace remains your reliable home base across all of Octavion.

GETTING STARTED

The Desk Layout and Navigation

Updated 2026-07-17

Once you open a product from your Workspace, you land in the desk — the main working area where you view records, run reports, and complete daily tasks. Every Octavion product shares the same desk layout, so once you learn it in one place, you know it everywhere. This article maps out the interface so you can move around with confidence.

The main regions of the desk

- Top bar — spans the full width of the screen. It holds the search box, quick-create shortcuts, notifications, help, and your account menu. It stays visible no matter where you navigate.
- Sidebar — on the left, it lists the workspaces and sections within the current product, such as Accounting, Selling, or Stock in Smart ERP. Use it to jump between areas.
- Content area — the large central region where the current page, list, or record is displayed.

Workspaces and modules

Inside each product, related features are grouped into modules — for example, Accounting, Buying, Selling, and Stock in Smart ERP. Each module has its own landing page with shortcuts to the reports, lists, and tools you use most. Click a module in the sidebar to open its landing page, then drill into the specific area you need.

Lists and records

Most of your work happens in two views:

- A list view shows all records of one type — for example, every Sales Invoice or every Customer. You can filter, sort, and search within a list, and select records to act on in bulk.
- A form view shows a single record in full detail. This is where you create and edit a customer, an invoice, an employee, or any other item. Save changes with the button in the top-right of the form, and use the sidebar within the record to see linked documents and activity.

Breadcrumbs and moving back

A breadcrumb trail near the top of the content area shows your path — for example, [Home](#) ■ [Accounting](#) ■ [Sales Invoice](#). Click any step to move back up. Your browser's back button also works reliably throughout the platform.

Creating records quickly

Use the **+ New** shortcut in the top bar to create a record without hunting through menus. You can also open any list and click the **New** button in its top-right corner.

Notifications and your account

The bell icon in the top bar collects mentions, assignments, and system alerts. Your avatar opens the account menu, where you open your profile, return to your Workspace, adjust personal preferences, and sign out.

Spend a few minutes clicking through these regions — the layout is consistent across Smart ERP, Advanced CRM, Octavion HR, and every other Octavion product, and familiarity here pays off in every module.

GETTING STARTED

Global Search and the Command Palette

Updated 2026-07-17

As your workspace fills with customers, invoices, contacts, and employees, scrolling through long lists becomes slow. Octavion's search box lets you jump straight to any record — or to any list, report, or new form — in seconds, keeping you fast even as your data grows. Learning to search well is one of the highest-value habits a new Octavion user can build.

Global search

Every product desk — Smart ERP, Advanced CRM, and Octavion HR — has a search box in the top bar. Open a product from its tile in your Workspace, then click the search box (or press **Ctrl + G**, **Cmd + G** on Mac) and start typing. Octavion searches across the records in that desk — customers, sales invoices, items, leads, contacts, employees, and more — and shows matching results as you type.

- Type part of a name, number, or keyword.
- Review the grouped results, which are sorted by record type.
- Click a result, or use the arrow keys and press Enter, to open it directly.

Global search matches on more than exact titles — it looks inside relevant fields, so searching a phone number, an email address, or an invoice amount can surface the right record even when you don't remember its name.

Use search to navigate and create

The same search box does more than find data — it is also the fastest way to move around a desk and to start new records, entirely from the keyboard. Instead of clicking through the left menu, type where you want to go.

- Jump to a list or report. Type the name of a screen — for example [Sales Invoice](#) under Accounting, or [Leads](#) under Advanced CRM — to go straight there.
- Create a new record. Type [New](#) followed by the record type, such as [New Customer](#) or [New Quotation](#), to open its blank form immediately.
- Reach deeper tools. Use it to open modules, chart of accounts, warehouses, or other destinations that would otherwise take several clicks.

Because it is keyboard-driven, this becomes the quickest way to work once it turns into muscle memory.

Search tips that save time

- Be specific. A unique fragment — an invoice number or the distinctive part of a company name — narrows results faster than a common word.
- Search by identifier. Email addresses, phone numbers, and document IDs are excellent search keys because they are unique.
- Create, don't just find. If a record doesn't exist yet, typing [New](#) plus the record type takes you straight to a blank form for it.

When results seem incomplete

Search only returns records you have permission to see. If you cannot find something a colleague can, it usually means your role does not include access to that record type — an administrator can review your access under **Settings** → **Roles & Permissions**. If a record was just created, give it a moment to be indexed, then search again.

Make the search box your default way of getting anywhere. Most experienced Octavion users rarely navigate by clicking through menus — they search, and they arrive.

GETTING STARTED

User Roles and Access

Updated 2026-07-17

Octavion controls what each person can see and do through roles. A role is a named bundle of permissions — the ability to view, create, edit, or delete specific kinds of records. Assigning the right roles keeps sensitive data protected, keeps each person's screen focused on their job, and ensures your team can act without stepping on one another's work.

How access works

Every user has one login to the whole platform, but what they can reach is shaped by three layers:

- **Subscription** — your organization must be subscribed to a product before anyone can use it. Each product Octavion offers, such as Smart ERP, Advanced CRM, Call Center, Octavion HR, or e-Invoicing, is licensed on its own. You can subscribe to another product at any time from Add more apps in your Workspace.
- **Product access** — within your subscription, an administrator assigns each user a paid seat in the specific products they need. This is what determines which product tiles appear on a person's Workspace launcher.
- **Roles** — inside each product, roles determine which modules, records, and actions the user can perform.

Common role types

While roles can be tailored to your organization, most companies work with a few familiar levels:

- **Administrator** — full control over the workspace, including users, settings, and all data. Keep this to a trusted few.
- **Manager** — broad access within a product, including reports and approvals, but without workspace-wide administration.
- **Standard user** — day-to-day access to create and manage records within their function, such as a salesperson working leads in Advanced CRM or an accountant posting invoices in Smart ERP.
- **Read-only user** — can view records and reports but not change them, useful for auditors or observers.

Assigning roles

- Open Settings from your Workspace and go to Team & Seats.
- Select an existing user, or invite a new one by entering their email.
- Assign them a paid seat in each product they should reach. This is what places the product's tile on their launcher.
- Move to Roles & Permissions and give the user one or more roles within each product that match their responsibilities.
- Save. The user receives access the next time they sign in.

Adding a user to a product requires a free paid seat in that product. If none is available, the invite is blocked until you add a seat or upgrade.

The principle of least privilege

Give each person the minimum access they need to do their job, and no more. This protects financial data, customer information, and employee records, and it keeps interfaces uncluttered. You can always add roles later from **Roles & Permissions** as someone's responsibilities grow — that is far safer than granting broad access up front.

Seats and licensing

Octavion is licensed per user for each product, and every product carries its own per-seat price. When you add a user to a product under **Team & Seats**, they occupy a seat in that product's subscription. If you reach your seat limit, open **Subscription & Billing** in Settings to add more seats before inviting additional users. Removing or deactivating a user who has left frees their seat for reassignment.

Reviewing access regularly

Set a habit of reviewing users and roles periodically — for example, each quarter. In **Team & Seats**, deactivate people who have left and reclaim their seats; in **Roles & Permissions**, tighten any access that has grown too broad and confirm that administrators are still the right individuals. Regular reviews are the simplest, most effective security control you have.

GETTING STARTED

Making Octavion Yours: Menu Order, Chart Boards & Theme

Getting Started

Octavion is shared by your whole team, but the way you work is yours. Three personal settings — your menu order, your dashboard chart boards, and your light or dark theme — are saved to *your account*, not to your browser. Arrange things once and your layout follows you to any computer, any browser, and any device you sign in from, without changing anything for anyone else on the team.

What you can do here

- Edit menu order — at the bottom of the left menu inside any product you will find Edit menu order. It switches the menu into editing mode, where every page becomes a draggable card under the hint Drag  to reorder your menu. Put the pages you open every hour at the top and the rare ones at the bottom, then click Done. The order is yours alone — each user arranges their own menu, separately for each product.
- Chart boards — dashboard pages such as Call Center Analytics, Reports, and Wallboard are built as boards of chart cards, and the board legend says it all: Drag  to rearrange ·  height ·  width ·  remove. Drag cards into the order that matches how you read your numbers, make the charts you rely on taller or wider, and remove the ones you never look at. Many chart cards also offer a style switcher, so you can flip a chart between looks — bars, lines, donut and more — and the style you choose is saved with the board. Removed charts are not gone — add them back anytime from the chart picker, which tells you All charts are already on the board once everything is placed.
- Light and dark theme — the theme button in the top bar switches between light and dark. Your choice applies across every Octavion product — Workspace, Smart ERP, Advanced CRM, Call Center, Octavion HR — so the platform always looks the way you chose, wherever you navigate.

Step by step: put your menu in your order

- Open the product whose menu you want to arrange — for example, Call Center.

- Scroll to the bottom of the left menu and click Edit menu order.
- The menu switches to editing mode with the hint Drag ■ to reorder your menu. Drag each card to where you want it; every drop is saved immediately to your account.
- Click Done to return to the normal menu. (While editing, the button at the bottom reads Exit menu editing — either one takes you back.)
- Sign in from any other computer or browser — your menu appears in exactly the order you set.

Tips & troubleshooting

- Everything on this page is stored in your Octavion account, not in the browser. Clearing browser data, switching machines, or reinstalling your browser loses nothing — sign in and your menu, boards, and theme are exactly as you left them.
- Your changes never affect teammates. Two agents sitting side by side can have completely different menu orders and chart boards, and each sees only their own arrangement.
- If a menu looks different from a colleague's screen, that is personalization working as designed — one of you has reordered it. Open Edit menu order and drag items to match if you want the same layout.
- Rearranging a chart board is a great first-day habit: put the two or three numbers you are accountable for at the top, widen them, and let everything else fall below the fold.

GETTING STARTED

Your First 30 Minutes: A Quick-Start Checklist

Updated 2026-07-17

Your First 30 Minutes on Octavion

This checklist takes you from a brand-new workspace to a working setup your team can start using. Follow it in order — each step builds on the last. Set aside about half an hour and work through it in one sitting.

Minutes 0–5: Sign in and set the foundation

Open your Workspace at app.octavion.ae/workspace and sign in with your administrator credentials. This is your one-login hub — every product opens from its tile here.

The core company details — company name, country, currency, time zone, and financial year — were captured when you first signed up. Open the **Smart ERP** tile and confirm they are correct, because these values drive every document and report. While you are there, confirm your company logo is in place so it appears on invoices and other customer-facing documents.

Minutes 5–10: Configure essentials

Back in your Workspace, open **Settings** (app.octavion.ae/settings). Under **Profile**, confirm your name, language, and time zone. Under **Notifications**, set how and when you want to be alerted.

Octavion already sends invoices, notifications, and password resets from a verified address, so there is nothing to wire up — you will simply start receiving them. If you operate from more than one location, add your additional branches, departments, or company addresses inside **Smart ERP**.

Minutes 10–18: Invite your team

In **Settings**, open **Team & Seats**. Invite your key colleagues by entering their email addresses.

Each user needs a paid seat. If no free seat is available, the invite is held until you add one — buy a seat or upgrade under **Subscription & Billing**, then send the invite.

Give each person access only to the products they need, and use **Roles & Permissions** to assign roles that match their responsibilities — a salesperson to **Advanced CRM**, an accountant to **Smart ERP**, and so on. Keep administrator rights limited to one or two trusted people. Sales teams can also send their own invites from the Advanced CRM invite screen, subject to the same seat rule.

Minutes 18–25: Explore the products you use

Return to your Workspace and open the product tile your team relies on most. Learn the desk layout: the top bar, the sidebar, and the content area.

Open one module and browse its landing page, then create one real record to see the form view and confirm your setup works end to end — a customer under **Selling** → **Customer**, a lead under **Advanced CRM** → **Leads**, or a person under **Octavion HR** → **Employee**. Then practice navigating: use the search bar in the top bar of your desk to jump straight back to the record you just created.

Minutes 25–30: Verify and hand off

Create a sample document — such as a draft invoice under **Accounting** → **Sales Invoice** or a **Selling** → **Quotation** — and confirm your company name, logo, and currency appear correctly. Trigger a notification (for example, share the record with yourself) to confirm alerts reach your inbox. Finally, sign out and sign back in to confirm the login flow is smooth for your team; you can review where you are signed in under **Settings** → **Active Sessions**.

What to do next

With the foundation in place, point each team to the documentation for their product — **Smart ERP** for finance and operations, **Advanced CRM** for sales, **Call Center** for telephony, **Octavion HR** for people management, and **e-Invoicing** for tax-compliant billing. Encourage everyone to make the desk search bar their default way of navigating, and to review the roles article so they understand what they can and cannot access.

If anything looks wrong, most first-day issues trace back to the company details — reopen **Smart ERP** (or the relevant **Settings** section), correct the value, and re-check. Thirty focused minutes here gives your organization a clean, accurate start on Octavion.

02

MODULE 02

Accounting

9 topics in this module:

- Company & Fiscal Year Setup
- Chart of Accounts
- Journal Entry
- Sales Invoice
- Purchase Invoice
- Payment Entry & Allocation
- Bank Reconciliation
- Taxes, Cost Centers & Accounting Dimensions
- Financial Reports

Company & Fiscal Year Setup

Updated 2026-07-17

Before you record a single transaction, Octavion needs to know who you are trading as and over what period you report. This is handled by your **Company** record and one or more **Fiscal Years**. Get these right first, because most other accounting settings inherit from them.

Create your company

- Open Accounting > Company and click New.
- Enter the legal Company Name and a short Abbreviation — the abbreviation is appended to every account name, so keep it distinctive.
- Select the Country and Default Currency. The currency cannot be changed once transactions exist, so confirm it now.
- Choose a Chart of Accounts template appropriate to your country, or start from a standard template and refine it later.
- Save. Octavion automatically builds a full ledger structure for the company.

Set default accounts

On the company record, scroll to the **Default Accounts** section and confirm the receivable, payable, rounding, and write-off accounts. These defaults populate automatically on invoices and payments, saving you from choosing them every time. You can also set a default cost center here so it flows onto new documents.

Define your fiscal year

A fiscal year is the 12-month window your reports summarise. Open **Accounting > Fiscal Year**:

- Set the Start and End dates. Many businesses use January–December, but you can align to any statutory year.
- Mark one year as the default so new transactions post to it automatically.
- Create the next fiscal year before the current one closes so postings near year-end never fail.

Working with multiple companies

If you run several legal entities, create a separate company for each. You can nest them under a parent company to enable consolidated group reporting. Each company keeps its own ledgers, currency, and fiscal calendar, while shared masters such as customers and items remain available across all of them.

Year-end

At the close of a fiscal year, run the **Period Closing** routine to move profit and loss balances into retained earnings. This keeps income and expense accounts starting fresh in the new year while your balance sheet carries forward correctly.

ACCOUNTING

Chart of Accounts

Updated 2026-07-17

The Chart of Accounts is the backbone of Octavion's accounting. It is a tree of every account your business posts to, organised so that reports such as the Balance Sheet and Profit & Loss build themselves automatically.

Groups and ledgers

Every account is either a **group** or a **ledger**. Group accounts are folders — you cannot post transactions to them, but they total up their children. Ledger accounts are the leaves where actual entries land. For example, *Current Assets* is a group that contains ledger accounts such as *Cash* and *Bank*.

Root types

Every account rolls up into one of five root types, and this decides where it appears on your financial statements:

- Asset, Liability, and Equity appear on the Balance Sheet.
- Income and Expense appear on the Profit & Loss statement.

Account type

Beyond the root type, each ledger carries an **account type** such as Bank, Cash, Receivable, Payable, Tax, Stock, or Fixed Asset. This tag drives behaviour — an account marked *Receivable*, for instance, requires a customer on every posting and feeds the Accounts Receivable report.

Create or edit an account

- Open Accounting > Chart of Accounts.
- Hover over the parent group and choose Add Child.
- Name the account, decide whether it is a group or a ledger, and set the account type and currency.
- Save. The account is immediately available in transactions.

You can rename or move an account later by editing it, even after transactions exist, and the historical postings follow it.

Controls and best practice

- Use Freeze Account to block further postings to accounts you no longer use.
- Keep the tree shallow and consistent — resist creating a ledger for every tiny expense; use cost centers or dimensions for that granularity instead.
- Set an account's balance must be to debit or credit to catch mispostings early.

A clean, well-structured chart pays off every time you read a report, so invest in it before volume builds up.

ACCOUNTING

Journal Entry

Updated 2026-07-17

A Journal Entry is the most direct way to post to your ledgers. Where invoices and payments create accounting entries for you behind the scenes, a journal entry lets you record any double-entry transaction by hand — accruals, depreciation, corrections, opening balances, and inter-account transfers.

The balancing rule

Every journal entry must balance: total debits must equal total credits. Octavion shows a running **Difference** figure and will not let you submit until it is zero. Each row posts to one account as either a debit or a credit amount.

Create an entry

- Open Accounting > Journal Entry and click New.
- Choose the Entry Type — for example Journal Entry, Bank Entry, Cash Entry, Depreciation, or Opening Entry. This is a label that helps you filter later.
- Set the Posting Date.
- Add rows in the Accounting Entries table. For each row pick the account and enter an amount in either the debit or the credit column.
- Where an account is a receivable or payable type, select the Party Type and Party so the entry links to the correct customer or supplier balance.
- Confirm the difference is zero, then Save and Submit.

Useful fields

- Reference number and date — record the cheque, contract, or document that supports the entry.
- User Remark — leave a note so anyone reviewing the ledger understands the purpose.
- Cost Center — tag each line for departmental reporting.
- Multi-currency — enable it to post lines in a foreign currency; Octavion converts to your company currency using the exchange rate you supply.

Corrections and reversals

A submitted journal entry is locked. To undo it, open the entry and choose **Cancel**, then create an amended copy if needed. You can also click **Reverse Entry** to generate a mirror-image posting on a date you choose, which preserves a clean audit trail rather than deleting history.

When to use a journal entry

Reach for a journal entry only when no dedicated document fits. Sales, purchases, and payments should always flow through their own forms so that customer and supplier balances, taxes, and stock stay accurate.

ACCOUNTING

Sales Invoice

Updated 2026-07-17

A Sales Invoice is the document you raise to bill a customer. When you submit it, Octavion books the revenue, records the tax, and increases what the customer owes you — all in one step.

Create an invoice

- Open Accounting > Sales Invoice and click New.
- Select the Customer. Their billing address, currency, price list, and payment terms load automatically.
- Add lines in the Items table — pick each item and set the quantity and rate. Amounts total as you type.
- Set the Posting Date and confirm the Due Date, which follows the customer's payment terms.
- Review taxes, then Save and Submit.

Taxes and totals

Apply a **Sales Taxes and Charges** template to add VAT or other charges automatically. You can also add freight, a discount, or a rounding adjustment. The **Totals** section shows net, tax, and grand total so you can verify the figure before issuing.

What posting does

On submission, Octavion debits the customer's receivable account and credits your income accounts, with tax posted to the relevant tax liability account. You can view the exact ledger impact from the invoice menu under **Accounting Ledger**, which is invaluable when reconciling.

Getting paid

From a submitted invoice, click **Create > Payment** to record the receipt and clear the balance. The invoice status moves from *Unpaid* to *Partly Paid* or *Paid* automatically. Overdue invoices are flagged so your receivables reports stay actionable.

Recurring and point-of-sale billing

- For subscriptions or retainers, set the invoice to repeat on a schedule so it regenerates without manual effort.
- For over-the-counter sales, switch on POS mode to capture payment on the same screen as the sale.

Credit notes and returns

To reverse or refund an invoice, open it and choose **Create > Return / Credit Note**. This produces a negative invoice that reduces the customer's balance and your recognised income. Always issue a credit note rather than editing or deleting a submitted invoice, so the audit trail stays intact.

ACCOUNTING

Purchase Invoice

Updated 2026-07-17

A Purchase Invoice records a bill you receive from a supplier. Submitting it recognises the expense or asset, captures recoverable tax, and increases what you owe the supplier.

Create a bill

- Open Accounting > Purchase Invoice and click New.
- Select the Supplier; their currency, address, and payment terms load automatically.
- Add each line in the Items table. For stock items, choose the item code; for services or overheads, pick an expense item or set the expense account directly on the row.
- Enter the supplier's Bill No and Bill Date for your records and to prevent duplicate entry.
- Save and Submit.

Taxes and charges

Apply a **Purchase Taxes and Charges** template to calculate input VAT and other levies. Charges such as freight or customs can be set to add to the value of the items received, or to post to a separate expense account, depending on how you treat them.

What posting does

On submission, Octavion credits the supplier's payable account and debits the relevant expense, asset, or stock accounts, with recoverable tax posted to an input tax account. Review the exact entries under **Accounting Ledger** on the invoice menu.

Paying the supplier

From a submitted bill, click **Create > Payment** to record the outgoing payment and clear the balance, or batch several bills into a single payment run. The invoice status updates automatically as it is settled.

Holds and approvals

- Put a bill On Hold with a release date to defer payment on a disputed or pending invoice.
- Route high-value bills through an approval workflow so they cannot be paid until authorised.

Debit notes

If you return goods or a supplier over-charges you, open the invoice and choose **Create > Return / Debit Note**. This posts a negative purchase invoice that reduces the payable and reverses the original expense, keeping your records accurate without editing the submitted bill.

ACCOUNTING

Payment Entry & Allocation

Updated 2026-07-17

A Payment Entry records money moving in or out — a customer receipt, a supplier payment, or a transfer between your own accounts. Its most important job is **allocation**: matching the money to the specific invoices it settles so balances stay accurate.

Record a payment

- Open Accounting > Payment Entry and click New.
- Set the Payment Type — Receive, Pay, or Internal Transfer.
- Choose the Party Type and Party (the customer or supplier).
- Select the Account Paid From and Account Paid To — typically a bank or cash account on one side and the party's control account on the other.
- Enter the amount received or paid.

Allocate against invoices

Once you pick the party, Octavion lists their outstanding invoices in the **References** table. Tick the invoices this payment covers and set the **Allocated Amount** on each row. You can settle an invoice fully or in part, and split one payment across several invoices. The **Unallocated Amount** field shows any remainder — leave it as an advance or reduce the payment.

Advances

If a customer pays before you invoice them, record the payment without references. The surplus is held as an advance against the party and can be linked to a future invoice, at which point the balance clears automatically.

Deductions, write-offs, and rounding

Use the **Deductions or Loss** table to book small differences — bank charges, early-payment discounts, or a minor write-off — to the appropriate account so the payment still balances against the invoice in full.

Currency differences

When you invoice in one currency and receive in another, or the exchange rate has moved since the invoice date, Octavion calculates the resulting exchange gain or loss and posts it automatically, so your bank account reflects the actual amount banked.

Confirming the result

After submitting, reopen the linked invoice — its status should read *Paid* or *Partly Paid*. If a customer's balance still looks wrong, check that every payment was allocated rather than left floating as an unallocated advance.

ACCOUNTING

Bank Reconciliation

Updated 2026-07-17

Bank reconciliation is how you prove that the cash balance in Octavion matches what your bank actually holds. You compare the platform's bank ledger against your bank statement, then match or record any differences until the two agree.

Bring in your statement

- Open Accounting > Bank Reconciliation.
- Select the Bank Account and the statement date range.
- Upload the statement file your bank provides, mapping the columns for date, description, deposit, and withdrawal.

Octavion loads each line from the statement ready to be matched against your recorded transactions.

Match transactions

For every statement line, the platform proposes matching payments, invoices, or journal entries already in your books. Where a confident match exists, accept it and the transaction is marked as cleared. You can adjust the suggested match if the amounts differ slightly or if one bank line covers several documents.

Handle unmatched lines

Statement lines with no match are usually transactions you have not recorded yet — bank fees, interest, direct debits, or a customer receipt you were not expecting. For each one you can:

- Create a Payment Entry directly from the reconciliation screen and allocate it to the right party or invoice.
- Create a Journal Entry for items such as bank charges or interest that have no invoice.
- Match to an existing document you locate by reference or amount.

Clearance dates

Reconciliation sets a **clearance date** on each matched transaction — the date the money actually moved at the bank, which may differ from the posting date. This lets Octavion distinguish cleared items from those still in transit, so a cheque you issued but which has not yet been cashed does not distort your reconciled balance.

Confirm you are balanced

When every statement line is matched and every book transaction is accounted for, the closing balance in Octavion will equal your statement's closing balance. Reconcile at least monthly — doing it regularly keeps the task small and catches errors, missed entries, or fraud while they are still easy to trace.

ACCOUNTING

Taxes, Cost Centers & Accounting Dimensions

Updated 2026-07-17

Three configuration tools let Octavion calculate charges correctly and slice your results the way management needs: **taxes and charges templates**, **cost centers**, and **accounting dimensions**. Set them up once and every transaction benefits.

Taxes and charges templates

A template is a reusable set of tax and charge rules you attach to invoices instead of typing rates each time. Create them under **Accounting > Sales Taxes and Charges Template** and the purchase equivalent:

- Name the template, for example Standard VAT 5%.
- Add each charge row with its type (a percentage of net total or a fixed amount), the rate, and the account it posts to.
- Mark one template as default so it applies automatically to new invoices.

For catalogues where items are taxed differently, use **Item Tax Templates** to override the rate on specific products, and **Tax Categories** to switch the whole template based on the customer's or supplier's location.

Cost centers

A cost center represents a part of the business you want to measure — a department, branch, or project. Build them as a tree under **Accounting > Cost Center**, mirroring your org structure. Tag lines on invoices, payments, and journal entries with a cost center, then filter the Profit & Loss statement by it to see how each unit performs. Set a default cost center on the company or on individual items to reduce manual tagging.

Accounting dimensions

When a single cost-center hierarchy is not enough, accounting dimensions add extra, independent ways to categorise every posting — by *Region*, *Product Line*, or *Campaign*, for example. Create them under **Accounting > Accounting Dimension**, point each at a master list, and they appear as extra fields across accounting documents.

Putting it together

With templates handling tax automatically and every entry tagged by cost center and dimension, your reports can answer questions like "what was the margin on Product Line A in the Northern region last quarter" without any manual spreadsheet work. Configure these before high transaction volume so historical data is tagged consistently from day one.

ACCOUNTING

Financial Reports

Updated 2026-07-17

Octavion turns your posted transactions into standard financial statements in real time. There is no month-end batch to run — every submitted invoice, payment, and journal entry updates the reports immediately. These are the core reports you will use and what each

one answers.

Profit & Loss Statement

Found under **Accounting > Financial Statements**, the Profit & Loss shows income minus expenses over a period, so you can see whether you made a profit. Set the period range and choose a periodicity — monthly, quarterly, or yearly — to compare columns side by side. Filter by cost center or accounting dimension to see performance by department or product line.

Balance Sheet

The Balance Sheet reports what you own and owe at a point in time: assets, liabilities, and equity. It always balances, because every transaction posts equal debits and credits. Use it to check solvency and to confirm that control accounts such as receivables and payables tie back to their detail reports.

Trial Balance

The Trial Balance lists every account with its opening balance, period movement, and closing balance. It is your first stop when the books look wrong — scan for accounts with unexpected balances, and confirm total debits equal total credits.

General Ledger

The General Ledger is the transaction-level detail behind every account. Filter by account, party, date range, cost center, or voucher to trace exactly which entries make up a balance. Click any line to open the source document. This is the report you drill into when reconciling or investigating a discrepancy.

Accounts Receivable and Payable

These two reports age outstanding balances into buckets — current, 30, 60, 90 days and beyond — so you can chase overdue customers and plan supplier payments. Group by customer, supplier, or territory, and export to share with your collections or finance team.

Working with any report

- Save a set of filters as a view you can reopen with one click.
- Export to spreadsheet or PDF for board packs and auditors.
- Adjust the period and comparison columns to spot trends rather than single-period snapshots.

03

MODULE 03

Selling

8 topics in this module:

- Managing Customers & Customer Groups
- Creating & Sending Quotations
- Managing Sales Orders
- The Order-to-Invoice Flow
- Price Lists & Pricing Rules
- Discounts & Sales Taxes
- Delivery Scheduling & Fulfilment
- Sales Analytics & Reports

Managing Customers & Customer Groups

Updated 2026-07-17

Every sale in Octavion starts with a **Customer** record. It stores the billing and shipping details, contacts, credit terms, and default price list used across quotations, sales orders, and invoices. Setting customers up correctly once saves you re-typing information on every transaction.

Creating a customer

- Open the Selling workspace and click Customer > New.
- Enter the Customer Name exactly as it should appear on documents.
- Choose a Customer Type — Company for organizations or Individual for a single person.
- Assign a Customer Group and Territory so the customer is included in the right reports and pricing rules.
- Save. You can now add addresses and contacts from the sidebar.

Addresses and contacts

Use the **Address** section to record separate billing and shipping locations; mark one of each as primary so it auto-fills on new documents. Under **Contact**, add the people you deal with, including email and phone, so correspondence and portal access are linked to the right individual.

Customer groups explained

A **Customer Group** is a category such as *Retail*, *Wholesale*, *Government*, or *Distributor*. Groups are hierarchical, so you can nest sub-groups under a parent. Groups let you:

- Apply pricing rules and discounts to a whole segment at once.
- Filter and total sales reports by segment.
- Set default credit limits and payment terms per segment.

To manage them, open **Customer Group** and build your tree. Keep the structure shallow and meaningful — three or four levels is usually enough.

Credit limit and payment terms

On the customer record, set a **Credit Limit** to cap how much outstanding balance the customer may carry; Octavion will warn or block new orders when the limit is exceeded. Assign a **Payment Terms Template** (for example, Net 30) so due dates calculate automatically on invoices.

Best practices

- Avoid duplicates — search before creating a new record. Merge duplicates from the customer list if they appear.
- Use a consistent naming convention so records sort predictably.
- Set the Default Currency and Price List for international customers so quotations use the right rates.

- Mark inactive customers as Disabled rather than deleting them, preserving transaction history.

SELLING

Creating & Sending Quotations

Updated 2026-07-17

A **Quotation** is a formal price offer you send to a customer before they commit to buying. In Octavion, quotations flow directly into sales orders, so a good quotation is the foundation of a clean sales cycle.

Creating a quotation

- Go to Selling > Quotation > New.
- In Quotation To, choose Customer for an existing account or Lead when you are still prospecting.
- Select the party. Their address, contact, and default price list load automatically.
- Set the Valid Till date so the offer has a clear expiry.

Adding items

In the **Items** table, add each product or service. Type the item code and the description, unit of measure, and rate fill in from the item master. Adjust **Quantity** and, if needed, override the **Rate**. The **Amount** calculates automatically, and any applicable pricing rules apply in real time.

Applying discounts and taxes

Enter a percentage or fixed **Discount** per line, or set an overall discount on the totals section. Choose a **Sales Taxes and Charges Template** to apply VAT or other charges. Octavion recalculates the grand total instantly so the figure the customer sees is final.

Reviewing and sending

- Check the Terms and Conditions — attach a template covering delivery, warranty, and payment.
- Click Save, then Submit to lock the figures.
- Use Print to preview the branded PDF, then Email to send it directly to the customer's contact.

Following up and converting

Track the status in the list view: *Open*, *Ordered*, *Expired*, or *Lost*. When a customer accepts, open the quotation and click **Create > Sales Order** — every line, price, and tax carries over so you never re-key data. If the deal falls through, set the status to **Lost** and record a reason for your win/loss analytics.

Tips

- Send revised versions by duplicating the original rather than editing a submitted document.
- Use the Valid Till field consistently so expired offers drop out of your open pipeline automatically.
- Group optional add-ons as separate lines so the customer can see what is included versus extra.

SELLING

Managing Sales Orders

Updated 2026-07-17

A **Sales Order** confirms a customer's commitment to buy. It is the control document for the rest of the cycle: it drives fulfilment, delivery, and invoicing, and it feeds demand into purchasing and production.

Creating a sales order

- Open Selling > Sales Order > New, or convert an accepted quotation with Create > Sales Order.
- Select the Customer; billing and shipping addresses populate automatically.
- Confirm the Order Type — Sales for standard goods, Maintenance for service contracts, or Shopping Cart for online orders.
- Add items with quantities and rates, then set the Delivery Date for each line.

Key fields to check

- Delivery Date — the promised date, used for scheduling and overdue alerts.
- Payment Terms — the schedule that determines invoice due dates.
- Set Warehouse — the source location goods will ship from.
- Taxes and Charges — the tax template applied to the whole order.

Submitting the order

Once details are correct, click **Submit**. The order becomes active and Octavion begins tracking two important percentages on each line: **Delivered Qty** and **Billed Qty**. These let you see at a glance how much of the order has shipped and how much has been invoiced.

What you can do next

From a submitted sales order, use the **Create** menu to progress the deal:

- Delivery Note — to ship goods to the customer.
- Sales Invoice — to bill the customer.
- Payment Request — to collect an advance or full payment.
- Material Request or Work Order — to procure or produce what you need to fulfil the order.

Amending and closing

To change a submitted order, click **Amend**, which creates a new revision while preserving the original for audit. When an order is fully delivered and billed, its status moves to **Completed** automatically. If a customer cancels before fulfilment, use **Close** to stop further processing without deleting the record.

Monitoring open orders

Use the **Sales Order** list filters to watch *To Deliver and Bill*, *To Bill*, and *Overdue* orders. This keeps your fulfilment team focused on commitments that are still outstanding.

SELLING

The Order-to-Invoice Flow

Updated 2026-07-17

The order-to-invoice flow is the backbone of your sales operation: it turns a confirmed **Sales Order** into shipped goods, a customer invoice, and finally a received payment. Octavion links every step so quantities and amounts reconcile automatically.

The five stages

- Sales Order — the customer commits and you confirm quantities, prices, and delivery dates.
- Delivery Note — you ship the goods and reduce stock.
- Sales Invoice — you bill the customer for what was delivered.
- Payment Entry — you record the money received against the invoice.
- Completion — the order closes once fully delivered and billed.

From order to delivery

Open the submitted sales order and choose **Create > Delivery Note**. Octavion pulls the ordered items and pre-fills quantities. Adjust for partial shipments if you are not delivering everything at once, then submit. Stock is deducted from the source warehouse and the order's **Delivered Qty** updates.

From delivery to invoice

You can raise the **Sales Invoice** from either the sales order or the delivery note. Creating it from the delivery note ensures you bill exactly what shipped. The invoice inherits items, rates, and taxes; confirm the **Payment Terms** and due date, then submit to post the receivable to your accounts.

Recording payment

From the submitted invoice, click **Create > Payment**. The outstanding amount pre-fills; select the bank or cash account that received the funds and submit. The invoice status moves to **Paid**, and the customer's outstanding balance drops accordingly.

Choosing your flow

- Deliver first, then invoice — standard for physical goods, so you bill only what shipped.
- Invoice first, then deliver — common for prepaid or advance-payment orders. Create the invoice directly from the sales order.
- Direct invoice — for services with no shipment, invoice straight from the order and skip the delivery note.

Keeping everything reconciled

Each sales order line tracks **Delivered Qty** and **Billed Qty** as percentages, so you can immediately spot orders that are shipped but not invoiced, or invoiced but not paid. Use the **Sales Order Analysis** report to review the whole pipeline and catch bottlenecks before they age.

Tip

Enable partial billing when large orders ship in phases — Octavion prevents over-billing by capping each invoice at the remaining quantity.

SELLING

Price Lists & Pricing Rules

Updated 2026-07-17

Octavion separates *what* you charge from *when* a special rate applies. **Price Lists** hold your standard rates, while **Pricing Rules** automatically adjust those rates for specific conditions. Together they remove manual price lookups from your sales team's workflow.

Setting up price lists

A **Price List** is a named set of item rates in a given currency — for example *Standard Selling*, *Wholesale*, or *Export USD*. To create one:

- Go to Selling > Price List > New.
- Name it, choose the Currency, and mark it as a Selling price list.
- Save, then add rates under Item Price, one entry per item and price list.

Assign a default price list to each customer or customer group so the correct rates load automatically on their documents. When a customer's currency differs, Octavion applies the current exchange rate.

How item prices work

Each **Item Price** record links an item to a price list and a rate. You can add a **Valid From** and **Valid Upto** date so seasonal prices activate and expire on their own, and set quantity thresholds so a rate applies only above a minimum order size.

Creating pricing rules

A **Pricing Rule** overrides or adjusts the base rate when conditions are met. Open **Selling > Pricing Rule > New** and define:

- Apply On — item code, item group, or brand.
- Conditions — customer, customer group, territory, minimum quantity, or minimum amount.
- Price or Discount — set a fixed rate, a percentage discount, or a fixed amount off.
- Validity — the date range the rule is active.

Controlling which rule wins

When several rules could apply, Octavion uses the **Priority** value — higher priority wins. Set **Apply Multiple Pricing Rules** if you want compatible rules to stack, or leave it off so only the top rule applies. Always test with a sample quotation to confirm the outcome.

Common uses

- Volume breaks — a lower rate once the quantity passes a threshold.
- Segment pricing — a standing discount for a wholesale customer group.

- Promotions — a time-limited percentage off a brand or item group.
- Free items — a buy-X-get-Y offer configured as a product discount.

Tip

Keep rules specific and few. A small number of well-scoped pricing rules is far easier to audit than dozens of overlapping ones.

SELLING

Discounts & Sales Taxes

Updated 2026-07-17

Discounts and taxes are applied on every quotation, sales order, and invoice. Octavion lets you set them at the line level or on the document total, and it recalculates the grand total instantly so the figure you present is always correct.

Applying discounts

You can discount in three places:

- Line discount — enter a Discount % or a Discount Amount on an individual item row. Use this when only some items are reduced.
- Automatic discount — let a Pricing Rule apply the reduction based on customer, quantity, or promotion, with no manual entry.
- Document-level discount — in the totals section, set Additional Discount as a percentage or amount applied to the whole document. Choose whether it applies on the net total (before tax) or the grand total (after tax).

Every discount is stored on the document, so your margin and profitability reports reflect the real selling price rather than the list price.

Setting up sales taxes

Taxes are managed through a **Sales Taxes and Charges Template** — a reusable set of tax lines you attach to a document. To create one:

- Go to Selling > Sales Taxes and Charges Template > New.
- Add a row for each charge, such as VAT.
- Choose the Type — On Net Total for a percentage of the pre-tax value, Actual for a fixed amount, or On Previous Row Total for compound taxes.
- Set the Rate and the account the tax posts to.

Inclusive versus exclusive tax

Tick **Is this Tax included in Basic Rate?** when your item prices already contain tax — common in retail. Octavion then back-calculates the tax portion from the displayed price. Leave it unticked to add tax on top of the net amount.

Applying taxes to a document

On any selling document, select the template in the **Taxes and Charges** field. The tax lines populate and the grand total updates. You can assign a default template per customer or territory so the right tax applies automatically — useful when you sell across regions with different VAT rules.

Best practices

- Create one template per tax scenario (domestic, export, zero-rated) rather than editing lines each time.
- Confirm the posting accounts with your finance team so returns reconcile cleanly.
- Preview the printed document to verify the customer sees taxes and discounts clearly itemized.

SELLING

Delivery Scheduling & Fulfilment

Updated 2026-07-17

Delivery scheduling keeps your promises to customers realistic and visible. Octavion tracks a delivery date on every sales order line, so you can plan shipments, warn on delays, and give customers accurate expectations.

Setting delivery dates

When you create a **Sales Order**, set the **Delivery Date** in the header to apply a single date to all items, or set a date per line for orders that ship in phases. Line-level dates are ideal when some items are in stock and others are on back order.

Planning partial and staged deliveries

Not every order ships in one go. To handle staged fulfilment:

- Open the submitted sales order and choose Create > Delivery Note.
- Reduce the quantity on each line to what you are shipping now.
- Submit the delivery note; stock is deducted and the order's % Delivered updates.
- Repeat for later shipments until the order is fully delivered.

Octavion prevents over-delivery by capping each delivery note at the remaining quantity, so staged shipments always reconcile with the order.

Checking stock availability

Before promising a date, confirm you can fulfil it. The **Set Warehouse** field on the order shows the source location, and the item's stock balance tells you what is on hand. For items you do not stock, raise a **Material Request** or **Purchase Order** from the sales order so procurement is triggered against the exact demand.

Monitoring the delivery pipeline

Use these tools to stay ahead of commitments:

- Sales Order list filtered by To Deliver — shows what is still outstanding.
- Delivery Date sort — surfaces the most urgent shipments first.

- Overdue highlighting — orders past their delivery date are flagged so nothing slips.

Confirming delivery to the customer

Once goods are shipped, print or email the **Delivery Note** as proof of dispatch. If you use carriers, record the tracking reference on the note so support staff can answer customer queries. When the customer receives the goods, the note serves as the basis for the matching **Sales Invoice**.

Tips for reliable scheduling

- Set realistic dates that account for procurement and production lead times, not just shipping.
- Review the open-delivery list daily so delays are caught early and communicated.
- For recurring customers, standardize a lead time and apply it consistently to protect your on-time record.

SELLING

Sales Analytics & Reports

Updated 2026-07-17

Octavion turns your day-to-day selling activity into insight. The **Selling** workspace includes built-in reports and dashboards that show what you are selling, to whom, and how profitably — without exporting data to a spreadsheet.

The selling dashboard

Open the **Selling** workspace to see headline numbers at a glance: total sales, open orders, quotations in progress, and revenue trends. Charts break the figures down by period so you can spot growth or slowdown quickly. Use the date filter at the top to switch between month, quarter, and year views.

Key reports and what they tell you

- Sales Analytics — a pivot of sales by customer, item, item group, or territory over time. Switch the tree view to drill from a segment down to individual records.
- Sales Order Analysis — shows delivered versus billed status across open orders, so you can find shipments and invoices that are lagging.
- Quotation Trends and Sales Order Trends — reveal seasonality and month-over-month momentum.
- Item-wise Sales History — ranks products by volume and value to guide stocking and promotions.
- Customer-wise Sales — highlights your top accounts and those whose spend is declining.
- Sales Person Commission — attributes revenue to each salesperson for performance and payout tracking.

Filtering and grouping

Every report supports filters for date range, customer group, territory, item group, and salesperson. Set the filters you use most, then save the configuration with **Save Filter** so you can reopen the exact view in one click. Use the **Group By** option to subtotal results by any dimension.

Analysing profitability

Because discounts and actual selling rates are stored on every document, margin reports reflect true profit, not list price. Compare gross sales against cost of goods to see which products and customers contribute most to the bottom line, and adjust pricing rules where margins are thin.

Exporting and sharing

- Open any report and apply your filters.
- Use Menu > Export to download the data as a spreadsheet or PDF.
- Click Menu > Print for a formatted copy to circulate.

You can also pin a report to your dashboard or schedule it to email automatically to stakeholders on a regular cadence.

Tip

Review the open-order and unbilled reports weekly. Catching stalled orders early protects both cash flow and customer trust.

04

MODULE 04

Buying

8 topics in this module:

- Buying Overview and Procurement Workflow
- Managing Suppliers and Supplier Groups
- Creating a Request for Quotation
- Working with Supplier Quotations
- Raising and Managing Purchase Orders
- Recording Purchase Receipts
- Setting Up Supplier Price Lists
- Purchase Analytics and Reports

Buying Overview and Procurement Workflow

Updated 2026-07-17

The **Buying** module in Octavion covers everything you need to source goods and services, control spend, and keep your inventory replenished. This article gives you the map of the full procurement cycle so you understand how each document connects before you dive into the details.

The standard procurement cycle

A typical purchase moves through a chain of linked documents. Each stage pulls data forward from the previous one, so you rarely re-enter information:

- Supplier — the vendor record that stores contact, tax, and payment details.
- Material Request — an internal request signalling that an item needs to be purchased (often raised automatically from low stock or a sales order).
- Request for Quotation (RFQ) — sent to one or more suppliers to collect prices.
- Supplier Quotation — the supplier's priced response, which you compare and select.
- Purchase Order (PO) — your formal commitment to buy at agreed terms.
- Purchase Receipt — recorded when goods physically arrive, updating stock.
- Purchase Invoice — the bill you book for payment, handled in the Accounting module.

You don't have to use every step

The cycle is flexible. For a trusted supplier with a known price, you can raise a Purchase Order directly and skip the RFQ and quotation steps. For services with no stock movement, you may go from Purchase Order straight to Purchase Invoice without a receipt.

How to open the module

- From the main menu, open the Buying workspace.
- Use the shortcut cards for Supplier, Purchase Order, and Purchase Receipt, or the sidebar to reach every document type and report.
- The workspace also surfaces your key charts — purchase order trends and pending receipts — so you get a status snapshot on arrival.

Roles and permissions

Access is controlled by role. A *Purchase User* can create and edit buying documents, while a *Purchase Manager* can submit, cancel, and approve them and configure module settings. Ask your administrator to assign the right role before you begin, so your team's approval flow is enforced automatically.

Before you start

To get clean data from day one, set up your **supplier groups**, default **currency and price lists**, and item records first. The following articles walk through each area in the order you'll typically need them. If you are new to the platform, read *Suppliers and Supplier Groups* next.

BUYING

Managing Suppliers and Supplier Groups

Updated 2026-07-17

A **Supplier** record is the master profile for every vendor you buy from. It stores contacts, addresses, tax identifiers, payment terms, and currency, and it links to every quotation, order, receipt, and invoice you exchange with that vendor. Setting suppliers up correctly means faster document entry and reliable spend reporting later.

Create a supplier

- Open the Buying workspace and select Supplier > New.
- Enter the Supplier Name as it should appear on documents.
- Choose a Supplier Group to categorise the vendor (see below).
- Set the Supplier Type — Company or Individual — which affects how tax fields behave.
- Select the vendor's default billing currency and, if relevant, a default price list.
- Save the record.

Add contacts, addresses, and tax details

After saving, use the **Contacts & Addresses** section to add one or more people and locations. Mark a primary contact so it auto-fills on new orders. In the **Tax** section, record the supplier's tax ID and default tax category so the correct tax template is applied to purchases automatically.

Set payment terms and defaults

Under **Accounting** and **Payment Terms**, define credit days and any default payment schedule. You can also nominate a default payable account per company. These defaults flow into every Purchase Order and Purchase Invoice, saving repeated entry and reducing errors.

Understand supplier groups

A **Supplier Group** is a category — for example *Raw Material*, *Services*, *Logistics*, or *Local vs. Import*. Groups are hierarchical, so you can nest specific groups under broader ones. They power reporting (spend by group), let you set default accounts per category, and make filtering long supplier lists manageable.

- Go to Supplier Group > New.
- Enter a name and choose a Parent Supplier Group to position it in the tree.
- Optionally set a default payable account for members of the group.

Block or disable a supplier

To stop new transactions with a vendor without deleting history, open the supplier and enable **Disabled**, or use **Block Supplier** to prevent specific actions such as new orders or payments while keeping the record intact.

Best practices

- Avoid duplicate suppliers — search before creating a new one.
- Keep group names broad enough to be useful in reports but specific enough to be meaningful.
- Fill tax and payment defaults once so downstream documents stay consistent.

BUYING

Creating a Request for Quotation

Updated 2026-07-17

A **Request for Quotation (RFQ)** is how you ask several suppliers to quote a price for the same items, so you can compare offers and buy competitively. It is the first outward-facing step in sourcing and is especially useful for new items, large orders, or whenever you want to test the market.

When to use an RFQ

Use an RFQ when you need pricing from multiple vendors before committing, when procurement policy requires competitive bids above a threshold, or when you are onboarding a new supplier. For routine reorders at a known price, skip straight to a Purchase Order instead.

Create the RFQ

- Open Buying > Request for Quotation > New.
- In the Items table, add each item and quantity you need quoted. You can also click Get Items From to pull lines directly from an existing Material Request.
- In the Suppliers table, add every supplier you want to invite. Make sure each has a contact with a valid email address.
- Set the required-by date and any message or terms in the notes.
- Save and then Submit the document.

Send it to suppliers

After submitting, use **Send Emails** to notify the invited suppliers. Each supplier receives a link to a secure **supplier portal** where they can enter their own prices. You can also print or export the RFQ as a PDF and send it manually if a vendor prefers offline communication.

Let suppliers respond in the portal

When a supplier opens their portal link, they see only their own line items and can fill in unit prices and lead times. On submission, Octavion generates a **Supplier Quotation** automatically and links it back to your RFQ — no manual re-keying on your side.

Track responses

- Open the RFQ and review the linked Supplier Quotations as they arrive.
- Use the Supplier Quotation Comparison report to line up prices side by side.
- Follow up with suppliers who have not yet responded before your required-by date.

Tips for clean sourcing

- Quote identical item codes and quantities to all suppliers so comparisons are fair.
- Always state a clear deadline — it drives faster responses.
- Keep the supplier list focused; inviting too many vendors slows evaluation without improving price.

Once quotations are in, move on to *Working with Supplier Quotations* to compare and select the winner.

BUYING

Working with Supplier Quotations

Updated 2026-07-17

A **Supplier Quotation** records the prices a vendor offers for the items you requested. It is the priced response to your Request for Quotation, and it becomes the basis for choosing a supplier and raising a Purchase Order. Quotations can arrive through the supplier portal or you can enter them manually from an emailed or printed offer.

How quotations are created

There are two paths:

- Automatically — when a supplier submits prices through the portal link from your RFQ, Octavion generates the quotation and links it back to the request.
- Manually — open Buying > Supplier Quotation > New, choose the supplier, and enter the items and prices yourself. Use Get Items From > Request for Quotation to pull the line items in one click.

Enter or review the details

- Confirm the supplier and valid-till date so expired offers are flagged.
- Check each item's rate, quantity, and unit of measure.
- Review any taxes and charges, freight, or discounts the supplier applied.
- Save and Submit to lock the quotation.

Compare quotations side by side

When several suppliers have quoted, use the **Supplier Quotation Comparison** report to see all rates for each item in a single grid. This makes it easy to spot the lowest price per line, and it lets you split an order across vendors — buying some items from the cheapest supplier and others from the most reliable.

Turn a quotation into an order

Once you have chosen a winning quotation:

- Open the submitted Supplier Quotation.
- Click Create > Purchase Order.
- The item lines, rates, and supplier details carry forward automatically. Adjust quantities if needed, then submit the order.

Track validity and status

- Quotations show a status of Draft, Submitted, Ordered, Expired, or Cancelled.
- Set the valid-till date so pricing you no longer honour is clearly marked as expired.
- You can keep unsuccessful quotations on record for audit and future sourcing reference.

Best practices

- Capture taxes and freight in the quotation so your comparison reflects true landed cost, not just unit price.
- Record the valid-till date every time — it protects you from ordering against stale prices.
- Keep the link to the originating RFQ intact for a clean audit trail.

BUYING

Raising and Managing Purchase Orders

Updated 2026-07-17

A **Purchase Order (PO)** is your formal, binding commitment to buy specified items or services from a supplier at agreed prices and terms. It is the central document of the buying cycle: it tells the supplier what to deliver, drives incoming stock expectations, and links forward to receipts and invoices.

Create a Purchase Order

You can create a PO several ways:

- From a Supplier Quotation — open the quotation and choose Create > Purchase Order so prices carry forward.
- From a Material Request — convert an approved internal request directly.
- From scratch — open Buying > Purchase Order > New for a known supplier and price.

Fill in the order

- Select the supplier; contact, currency, and payment terms auto-fill from the supplier record.
- Set the required-by date for delivery.
- In the Items table, add each item with quantity, rate, and target warehouse.
- Review taxes and charges — apply a tax template or add freight and other costs.
- Check the payment terms and any advance required.
- Save, then Submit to make the order official.

Send the order to your supplier

After submitting, use **Print** to generate a branded PDF or **Email** to send it directly. The supplier can also view it through their portal. The document number gives both sides a shared reference for all follow-up.

Track fulfilment

Each PO shows two progress indicators that update automatically as downstream documents are created:

- % Received — increases as Purchase Receipts are booked against the order.
- % Billed — increases as Purchase Invoices are recorded.

This lets you see at a glance which orders are still open, partially delivered, or fully closed.

Amend, hold, or close an order

- To change a submitted PO, use Cancel > Amend, which creates a revised version while preserving the audit trail.
- Put an order On Hold to pause it without cancelling.
- Use Close to finalise an order that will not be fully delivered — for example when the supplier ships slightly less than ordered and you accept the shortfall.

Move forward

From a submitted PO you can create a **Purchase Receipt** when goods arrive, or a **Purchase Invoice** for billing. See *Recording Purchase Receipts* for the next step in the cycle.

Best practices

- Always set the target warehouse so stock lands in the right place on receipt.
- Confirm payment terms match what was negotiated before submitting.
- Use amend rather than a new PO so revisions stay traceable.

BUYING

Recording Purchase Receipts

Updated 2026-07-17

A **Purchase Receipt** records that goods from a supplier have physically arrived at your warehouse. Submitting it increases your stock levels and creates the accounting entries that value the received inventory. It is the bridge between ordering and paying, and it keeps your on-hand quantities accurate.

Create a receipt from an order

The fastest and most accurate way is to pull from an existing Purchase Order:

- Open the submitted Purchase Order.
- Click Create > Purchase Receipt. All ordered items, quantities, rates, and the target warehouse carry forward.
- Adjust the received quantity on each line to match what actually arrived — leave the rest open for a later delivery.
- Save and Submit to update stock.

You can also start a receipt from scratch via **Buying > Purchase Receipt > New** when there is no originating order.

Handle partial and over deliveries

- Partial delivery — enter only the quantity received. The Purchase Order stays open, and you can raise further receipts as the balance arrives.
- Over delivery — if the supplier ships more than ordered, the platform enforces an over-receipt allowance (set in Buying Settings) before letting you accept extra quantity.

Inspect quality on arrival

If an item requires inspection, the receipt can require a **Quality Inspection** before the goods are accepted into stock. Record the inspection result against the line so rejected material is not counted as usable inventory.

Record rejected quantity

When part of a shipment is damaged or does not meet spec, enter the amount in the **rejected quantity** field and assign a rejected warehouse. Accepted and rejected quantities are tracked separately, so your usable stock reflects only what passed inspection.

Add landed costs

Freight, customs duty, and handling can be added so your inventory is valued at true landed cost rather than just the supplier's price. Apply these charges on the receipt, or use a **Landed Cost Voucher** to distribute costs across the received items proportionally.

What happens after submission

- Stock quantities for the received items increase in the target warehouse.
- Valuation entries are posted, ready for the Accounting module.
- The linked Purchase Order's % Received updates automatically.
- You can then click Create > Purchase Invoice to bill the delivery.

Best practices

- Always receive against the Purchase Order rather than entering items manually — it keeps quantities and prices consistent.
- Record rejections and inspections at receipt time, not later, so stock is accurate immediately.
- Capture landed costs promptly to keep item valuation reliable.

BUYING

Setting Up Supplier Price Lists

Updated 2026-07-17

A **Price List** is a named set of item rates. On the buying side, a buying price list stores the prices you expect to pay, so that rates fill in automatically when you raise quotations, orders, and invoices. Well-maintained price lists cut data entry, prevent pricing mistakes, and give you a record of how supplier costs change over time.

Create a buying price list

- Go to Buying > Price List > New (also available under Stock and Accounting settings).
- Enter a clear name — for example Standard Buying or Import Prices USD.
- Enable the Buying checkbox so the list is available on purchase documents.
- Set the price list currency.
- Save the list.

Add item rates

Individual rates are stored as **Item Price** records that reference a price list:

- Open Item Price > New.
- Select the item and the price list you created.
- Enter the rate and, optionally, the supplier the price applies to.
- Set valid-from and valid-upto dates so time-limited pricing expires automatically.

You can maintain supplier-specific prices for the same item — useful when different vendors charge different rates for identical goods.

Assign a default price list to a supplier

On each supplier record, set a **default buying price list**. When you create a Purchase Order for that supplier, item rates are pulled from their assigned list, so you rarely type a price by hand.

Use quantity and validity conditions

- Minimum quantity — record volume-based rates so bulk purchases automatically use the cheaper price.
- Validity dates — keep historical and future prices side by side; the system applies whichever is valid on the document date.

Automate rate application with pricing rules

For discounts and margins that go beyond a flat rate, create a **Pricing Rule**. Pricing rules can apply a percentage discount, a fixed reduction, or free items based on conditions such as supplier, item group, or order value — and they apply automatically as you build a document.

Keep costs up to date

- Update Item Prices whenever a supplier revises a quote so orders reflect current cost.
- Use validity dates rather than overwriting old rates, preserving price history for analysis.
- Review price lists periodically against actual invoiced amounts to catch drift.

Accurate price lists feed directly into the spend reports covered in *Purchase Analytics and Reports*.

BUYING

Purchase Analytics and Reports

Updated 2026-07-17

The Buying module includes built-in analytics and reports that turn your procurement documents into insight — how much you spend, with which suppliers, on which items, and how reliably orders are fulfilled. Use them to negotiate better, spot bottlenecks, and plan replenishment.

Purchase Analytics

The **Purchase Analytics** report is your main dashboard for spend trends. To use it:

- Open Buying > Purchase Analytics (in the Reports section of the workspace).
- Choose the tree type — analyse by Supplier, Supplier Group, Item, or Item Group.
- Select the value or quantity basis and a period — monthly, quarterly, or yearly.
- Set the date range and view the results as a chart plus a period-by-period table.

This lets you answer questions such as which supplier group consumes the most budget or how a single item's purchase cost trends across the year.

Core buying reports

- Purchase Order Analysis — see ordered versus received and billed quantities to track open commitments and delivery gaps.
- Received Items to be Billed — lists goods received where no invoice has yet been booked, so nothing slips through unpaid or unrecorded.
- Purchase Order Trends — visualises order volume and value over time to reveal seasonality and growth.
- Supplier-Wise Sales Analytics — evaluates how items sourced from each supplier ultimately perform.
- Procurement Tracker — follows each request from material request through to receipt, exposing delays at any stage.

Build your own views

Beyond the standard reports, use the **Report Builder** on any buying document to filter, group, and export data without technical help:

- Open the list view of a document such as Purchase Order.
- Apply filters (supplier, date, status, warehouse).
- Choose columns and grouping, then save the layout as a reusable report.
- Export to spreadsheet or PDF for sharing.

Dashboards and charts

Pin key metrics — monthly purchase value, top suppliers, pending receipts — to a **dashboard** so your team sees procurement health at login. Charts refresh automatically as new documents are submitted.

Best practices

- Keep supplier groups and item groups tidy — clean categories make analytics far more useful.
- Review Received Items to be Billed regularly to keep payables accurate.

- Compare quoted, ordered, and invoiced values periodically to measure how well negotiated prices hold up in practice.

05

MODULE 05

Inventory

9 topics in this module:

- Items & Item Groups
- Warehouses
- Stock Entries: Receipt, Issue, Transfer & Re...
- Purchase Receipts
- Delivery Notes
- Batches & Serial Numbers
- Stock Valuation: FIFO & Moving Average
- Stock Reconciliation
- Reorder Levels & Stock Reports

Items & Item Groups

Updated 2026-07-17

Every product, raw material, spare part, or service you buy, sell, or store in Octavion is represented by an **Item**. Getting your item master right is the foundation of accurate inventory, so invest time here before you record any stock movements.

Creating an item

- Open the Inventory module and go to Item > New.
- Enter an Item Code (a short unique identifier) and an Item Name (the human-readable description). If you leave Item Code blank, Octavion can generate one from your naming series.
- Assign an Item Group to classify the item (see below).
- Set the Default Unit of Measure — for example Nos, Kg, Litre, or Box. This is the unit all stock is counted in.
- Add an image and description so users can identify the item easily on transactions.

Stock vs. non-stock items

Tick **Maintain Stock** for anything you physically hold and want to track quantity for. Leave it unticked for services, subscriptions, or expenses that never touch a warehouse. Once transactions exist against an item, you cannot switch this flag, so decide carefully.

Item defaults

In the **Item Defaults** section you can set a default company, default warehouse, default supplier, and default income/expense accounts. These values pre-fill automatically on purchase and sales documents, reducing errors and data entry.

Organising with item groups

Item Groups form a tree that categorises your catalogue — for example *Raw Materials*, *Finished Goods*, *Consumables*, and *Services*. To manage them, go to **Item Group** and build a hierarchy of parent (group) nodes and child (leaf) nodes. Reports, filters, and pricing rules can all target an entire group, so a clean structure saves effort later.

Variants

If a product comes in several sizes or colours, enable **Has Variants** on a template item and define attributes such as Size and Colour. Octavion then generates individual variant items (for example "T-Shirt-Red-L") that share the template's settings but hold their own stock. Use variants instead of dozens of standalone items to keep your catalogue tidy.

Best practices

- Adopt a consistent item-code convention and stick to it across all users.
- Set the correct default UOM before the first transaction — changing it afterwards is disruptive.
- Use item groups, not free-text descriptions, to categorise, so reporting stays reliable.
- Mark discontinued products as Disabled rather than deleting them, preserving transaction history.

INVENTORY

Warehouses

Updated 2026-07-17

A **Warehouse** in Octavion is any location where stock is held — a physical building, a storeroom, a shelf, a delivery van, or even a virtual holding area such as goods in transit. Every stock movement records the warehouse it came from and the warehouse it went to, so your warehouse list should reflect how you actually store and move goods.

How warehouses are organised

Warehouses are arranged in a tree. **Group warehouses** are containers used only for structure and reporting; you cannot store stock directly in them. **Leaf warehouses** are the actual storage locations where quantities are held. For example, a group called *Dubai Main Store* might contain leaf warehouses *Rack A*, *Rack B*, and *Cold Room*.

Creating a warehouse

- Go to Inventory > Warehouse > New.
- Enter a clear Warehouse Name.
- Choose the Parent Warehouse to place it correctly in the tree.
- Tick Is Group only if this node will contain other warehouses rather than hold stock itself.
- Optionally set an Account so the value of stock in this warehouse posts to a specific ledger, and add the physical address for shipping documents.
- Save.

Setting default warehouses

To speed up data entry, assign a default warehouse on each item (in Item Defaults) or a company-wide default in company settings. Purchase and sales documents then pre-fill the warehouse automatically, though you can always override it on any individual line.

Transit warehouses

When you move stock between two physical locations that takes time, use a **Transit Warehouse**. Stock leaves the source, sits in transit while it travels, and is received into the destination on arrival. This keeps your books accurate about where goods actually are rather than showing them in two places at once.

Managing warehouses over time

- You cannot delete a warehouse that has stock or transactions against it — reduce its balance to zero first, then Disable it to hide it from selection lists.
- Renaming is allowed and updates all linked records, but keep names stable to avoid confusing your team.
- Use the Stock Balance report filtered by warehouse to see exactly what each location holds at any date.

Design your warehouse tree to mirror your real operations. A well-structured hierarchy makes stock counts, transfers, and location-level reporting far easier.

INVENTORY

Stock Entries: Receipt, Issue, Transfer & Repack

Updated 2026-07-17

A **Stock Entry** is the all-purpose document for moving inventory when there is no customer or supplier involved. You choose a **Purpose** that tells Octavion whether stock is coming in, going out, moving between warehouses, or being converted into something else.

The main purposes

- **Material Receipt** — brings new stock into a warehouse without a purchase document. Use it for opening balances, found stock, or free samples. You specify only a target warehouse.
- **Material Issue** — removes stock from a warehouse, for consumption, scrap, or write-off. You specify only a source warehouse.
- **Material Transfer** — moves stock from one warehouse to another. You specify both a source and a target warehouse.
- **Repack** — consumes one or more items and produces different items, for example unpacking a bulk carton into retail units, or bundling components into a kit.

Creating a stock entry

- Go to Inventory > Stock Entry > New.
- Select the Stock Entry Type (purpose) that matches what you are doing.
- Set the default source and/or target warehouse at the top so lines pre-fill.
- Add each item in the Items table with its quantity. Adjust the source or target warehouse per line if they differ.
- Review the Valuation Rate and Amount columns — for receipts you may need to enter the incoming rate manually.
- Click Save, then Submit to post the movement to the stock ledger.

How Repack balances value

In a Repack, the items you consume appear as source lines and the items you produce appear as target lines. Octavion distributes the total value of the consumed items across the produced items, so the operation is value-neutral. If you add labour or overhead, enter it as an **Additional Cost**, and it will be absorbed into the value of the finished items.

Tips

- Always check the posting date and time — stock entries affect valuation in date order, so back-dating can change reported balances.

- Once submitted, a stock entry is locked. To reverse it, use Cancel, which posts an equal and opposite movement.
- For batch- or serial-tracked items, select the specific batch or serial numbers on each line before submitting.
- Use Material Receipt to load opening stock only if you are not using Stock Reconciliation for that purpose.

INVENTORY

Purchase Receipts

Updated 2026-07-17

A **Purchase Receipt** records goods physically arriving from a supplier. Submitting it increases stock in the receiving warehouse and creates the accounting entry that recognises the inventory you now own. It is the inbound counterpart to a Delivery Note.

Creating a purchase receipt

The fastest route is to pull from an existing Purchase Order:

- Open the Purchase Order and click Create > Purchase Receipt, or start a new receipt from Inventory > Purchase Receipt > New and use Get Items From to fetch the order lines.
- Confirm the Supplier and the Accepting Warehouse where the goods will be stored.
- For each line, enter the Accepted Quantity that arrived in good condition.

Handling damaged or short deliveries

If some units are unusable, enter them as **Rejected Quantity** and choose a separate **Rejected Warehouse** to quarantine them. Only accepted quantity is added to sellable stock. If the delivery is short, receive only what arrived; the outstanding balance stays open on the Purchase Order for a later receipt.

Quality inspection

For items that require checking, Octavion can require a **Quality Inspection** before the receipt is submitted. Record measurements against your defined parameters, mark the inspection accepted or rejected, and link it to the receipt line so you have an audit trail of what passed.

Batches, serials, and landed cost

- For tracked items, assign or auto-create batch numbers and enter serial numbers on each line as the goods are received.
- To include freight, customs, or handling in the item value, add a Landed Cost Voucher after receipt. The extra cost is distributed across the received items, raising their valuation rate so your margins stay accurate.

From receipt to invoice

Once the receipt is submitted, click **Create > Purchase Invoice** to bill against exactly what you received. This three-way match between order, receipt, and invoice prevents you from paying for

goods that never arrived.

Correcting mistakes

A submitted receipt is locked. If you received the wrong quantity or warehouse, **Cancel** the receipt — which reverses the stock movement — then create a corrected one. Avoid deleting; cancellation preserves a clean audit history.

INVENTORY

Delivery Notes

Updated 2026-07-17

A **Delivery Note** records goods leaving your warehouse and going to a customer. Submitting it reduces stock and posts the cost of the goods to your accounts. It doubles as the shipping document you hand to the driver or courier.

Creating a delivery note

The usual flow starts from a Sales Order:

- Open the Sales Order and click Create > Delivery Note. The customer, items, quantities, and prices are copied across automatically.
- Alternatively, start from Inventory > Delivery Note > New and use Get Items From to pull an order, or build the lines manually for a direct sale.
- Confirm the Source Warehouse on each line — this is where stock will be deducted from.
- Set the quantity actually being shipped. For a partial shipment, reduce the quantity; the balance stays open on the Sales Order for later.

Checking stock availability

Before you submit, Octavion validates that enough stock exists in the source warehouse. If a line would push the balance negative and negative stock is not allowed, the submission is blocked. Use the Stock Balance report or fulfil from another warehouse to resolve shortages.

Batches and serial numbers

For tracked items, select the exact **batch** or **serial numbers** being shipped on each line. This ties specific physical units to the customer, which is essential for warranty claims and recalls later.

Packing and shipping details

- Use the Packing List to record how items are boxed, including net and gross weights for the carrier.
- Add the delivery address, transporter, and vehicle details for the printed dispatch document.
- Attach proof of delivery once the customer confirms receipt.

Turning the delivery into revenue

After submitting, click **Create > Sales Invoice** to bill the customer for exactly what was shipped. This keeps invoiced amounts aligned with delivered quantities. You can also consolidate several delivery

notes into a single invoice at period end.

Returns

If a customer sends goods back, open the original Delivery Note and choose **Create > Return / Sales Return**. This produces a return document with negative quantities that adds the stock back into your warehouse and reverses the cost, keeping both inventory and accounts accurate.

INVENTORY

Batches & Serial Numbers

Updated 2026-07-17

Batch and serial tracking give you traceability over individual units or production lots. Use them when you must know exactly which physical stock went to which customer — for expiry control, recalls, warranty claims, or regulatory compliance.

Batches vs. serial numbers

- A Batch groups many identical units produced or received together — for example a production run of medicine or a shipment of paint. Each batch can carry a manufacturing date and an expiry date.
- A Serial Number identifies a single unique unit — for example one laptop or one machine. Each serial number is tracked individually from receipt to sale, including warranty terms.

Enabling tracking on an item

- Open the item and tick Has Batch No and/or Has Serial No.
- For batches, decide whether numbers are created automatically from a naming series or entered manually, and set whether expiry is mandatory.
- Do this before any stock exists for the item — you cannot enable tracking retroactively on an item that already has movements.

Working with batches

When you receive a batch-tracked item, Octavion creates the batch record and prompts you for its expiry. On outbound documents you select which batch to ship. Enable **Auto-select** so the system picks the earliest-expiring batch first, enforcing a First-Expiry-First-Out discipline and reducing waste from expired stock.

Working with serial numbers

On receipt, enter or auto-generate a serial number for every unit. Each serial number becomes its own record showing current warehouse, status (In Store, Delivered, or Expired), the customer it was sold to, and warranty start and end dates. On delivery you must pick the exact serial numbers leaving, so the history of each unit is complete.

Tracing a unit

To follow the full history of any batch or serial number, open its record and review the linked transactions, or run the **Serial No / Batch Ledger**. You will see every receipt, transfer, and delivery it

passed through — invaluable when investigating a defect or executing a recall.

Practical tips

- Turn on expiry alerts so staff act on ageing batches before they become unsellable.
- Keep serial-number labels physically on the goods so warehouse staff can scan and match them accurately.
- Because tracked items require a selection on every movement, reserve tracking for items that genuinely need it — over-using it slows down data entry.

INVENTORY

Stock Valuation: FIFO & Moving Average

Updated 2026-07-17

Stock valuation determines the monetary value Octavion assigns to your inventory and the cost of goods it charges to your accounts when items are sold or consumed. Choosing the right method keeps your balance sheet and margins accurate.

The two methods

- FIFO (First In, First Out) assumes the oldest stock is used up first. Each unit keeps the exact cost it was received at, and outgoing movements are valued from the earliest received layers. This mirrors how perishable and dated goods actually flow.
- Moving Average maintains a single blended cost per unit. Every receipt recalculates the average by combining existing value with the new purchase value. Outgoing movements are valued at this current average.

A quick comparison

Suppose you buy 10 units at 100 and later 10 units at 120. Under FIFO, the first 10 units you issue are valued at 100 each, the next 10 at 120. Under Moving Average, all 20 units carry a blended cost of 110 each. Over time both methods total the same, but they report different costs on any individual sale — which affects reported profit period by period.

Where to set the method

- The default is defined in Inventory Settings and applies to all items unless overridden.
- To override for a specific item, open the item and set its Valuation Method field to FIFO or Moving Average.
- Set the method before the item has transactions. Changing it once movements exist requires re-posting and can shift historical values.

How the valuation rate is used

The **valuation rate** is the per-unit cost stored in the stock ledger. On a Purchase Receipt it comes from the purchase price plus any landed costs. On a Delivery Note or Material Issue, Octavion reads the valuation rate using your chosen method and posts that amount as cost of goods. You normally never type this rate on outbound documents — the system computes it.

Choosing the right method

- Use FIFO for perishable, batch-dated, or high-value serialised goods where cost layers matter and prices fluctuate.
- Use Moving Average for high-volume, fungible items where a single stable cost is simpler to manage and report.

Whichever you pick, apply it consistently and confirm it aligns with your accounting policy, since it directly influences your cost of goods sold and inventory valuation on financial statements.

INVENTORY

Stock Reconciliation

Updated 2026-07-17

Stock Reconciliation lets you correct system quantities and valuations to match a physical count. Use it after a stocktake, to load opening balances when you first go live, or to fix discrepancies caused by shrinkage, breakage, or historical data errors.

When to reconcile

- Opening stock — record what you already hold on the day you start using Octavion, with quantities and rates.
- Physical count adjustment — align system figures with the numbers your team counted on the shelves.
- Valuation correction — restate the value of stock without changing its quantity, for example after a revaluation.

Running a reconciliation

- Go to Inventory > Stock Reconciliation > New and choose the Purpose (Opening Stock or Stock Reconciliation).
- Click Fetch Items and filter by warehouse or item group to pull in the current system balances, or import them from a spreadsheet.
- For each row, overwrite the Quantity and, where needed, the Valuation Rate with the correct figures. Leave a cell unchanged if it is already right.
- Set the Posting Date and Time to the moment the count was taken — this determines where the adjustment lands in your stock history.
- Save and Submit.

What happens on submission

Octavion compares the counted figure with the system figure and posts the difference to the stock ledger. If the count is higher, stock is added; if lower, stock is removed. The value of any difference is booked to a **Stock Adjustment** expense account, so your inventory value and general ledger stay in step automatically.

Best practices

- Count and reconcile during a quiet period, and pause other stock transactions for the items involved so numbers do not shift mid-count.
- Reconcile by warehouse or item group in manageable batches rather than the whole catalogue at once.
- Always enter a valuation rate when setting opening stock — a zero rate will value that inventory at nothing.
- Keep the signed physical count sheets as supporting evidence for auditors.
- Because reconciliation overrides balances directly, restrict permission to trusted inventory controllers.

Correcting a reconciliation

If you submit wrong figures, **Cancel** the reconciliation to reverse the adjustment, then submit a corrected one. Review the **Stock Ledger** afterwards to confirm the balances now match reality.

INVENTORY

Reorder Levels & Stock Reports

Updated 2026-07-17

Once stock is moving through Octavion, two capabilities keep you in control: automatic **reorder levels** that prevent stockouts, and the core **stock reports** that show what you hold and how it got there.

Setting reorder levels

A reorder level triggers replenishment before an item runs out. To configure it:

- Open the item and scroll to the Auto Re-order section.
- Add a row specifying the Warehouse, the Reorder Level (the quantity at which to act), and the Reorder Quantity (how much to bring back in).
- Choose the Material Request Type — Purchase to buy more, or Transfer to pull from another warehouse.
- Save.

When projected quantity for that warehouse falls to or below the reorder level, Octavion automatically raises a **Material Request** for the reorder quantity, so buyers can act promptly. Ensure automatic reordering is enabled in Inventory Settings and that a valid email is configured to receive the notifications.

The Stock Balance report

The **Stock Balance** report is your snapshot of current holdings. Filter by warehouse, item group, or date range to see opening quantity, inward and outward movement, closing quantity, and the closing value for each item. Use it to answer "how much do we have and what is it worth?" at any point in time, and export it for stocktakes or audits.

The Stock Ledger report

The **Stock Ledger** is the transaction-by-transaction history behind every balance. Each row shows the document that moved the stock, the quantity in or out, the resulting balance quantity, the valuation rate, and the running value. When a balance looks wrong, open the Stock Ledger for that item and warehouse and trace each movement to find the cause.

Projected quantity

Beyond what is physically present, the **Stock Projected Qty** report factors in incoming purchase orders and outgoing sales orders to show your *net future position*. This is the figure reorder rules act on, so it prevents over-ordering when goods are already on the way.

Putting it together

- Set reorder levels on your fast-moving and critical items first — they deliver the most benefit.
- Review the Stock Balance report on a regular cadence to catch slow-moving or excess stock.
- Reach for the Stock Ledger whenever a number is disputed; it is the single source of truth.
- Watch projected quantity, not just on-hand quantity, when planning purchases.

06

MODULE 06

Manufacturing

8 topics in this module:

- Building a Bill of Materials (BOM)
- Creating a Production Plan
- Raising and Managing Material Requests
- Running a Work Order
- Job Cards and Shop-Floor Execution
- Managing Subcontracting
- Capacity Planning and Scheduling
- Manufacturing Reports and Analytics

Building a Bill of Materials (BOM)

Updated 2026-07-17

The Bill of Materials (BOM) is the master recipe for every item you manufacture in Octavion. It lists the raw materials, the quantities consumed, the operations performed, and the resulting cost of a finished product. Every Work Order and Production Plan draws on a BOM, so getting it right is the foundation of accurate manufacturing.

Creating a new BOM

- Open the Manufacturing module and select Bill of Materials > New.
- Choose the Item you want to produce. Only items marked as stock or manufactured items can be selected.
- Set the Quantity the recipe produces (for example, 1 unit or a batch of 100).
- In the Materials table, add each raw material or sub-assembly, its quantity, and unit of measure.
- Save the BOM and click Submit to make it usable in production.

Adding operations and routing

If your product requires labour or machine time, enable **With Operations**. You can then attach a **Routing** — a reusable sequence of operations such as cutting, assembly, and finishing — or add operations manually. Each operation is linked to a workstation and an estimated time, which Octavion uses to schedule work and calculate operating cost.

Costing and valuation

Octavion values a BOM automatically. Choose whether raw materials are priced from **Valuation Rate** (actual stock cost) or from a **Price List**. The platform sums material cost, operating cost, and any scrap value to produce a total per-unit cost. Use **Update Cost** whenever material prices change so downstream estimates stay accurate.

Scrap and by-products

Add expected waste or saleable by-products in the **Scrap Items** table. Their value is deducted from the finished-good cost, giving you a realistic net production cost.

Default and multi-level BOMs

- Mark one BOM per item as Default so it is selected automatically on new Work Orders.
- Use a finished sub-assembly as a component in a higher-level BOM to model multi-level production. Octavion can explode these levels when planning, showing every raw material needed down the tree.
- Keep older versions inactive rather than deleting them, so historical Work Orders remain traceable.

Best practices

Review BOMs before every major production run, verify unit-of-measure conversions, and use the **BOM Comparison** view to check the impact of a design change. A clean, submitted, default BOM

ensures your Work Orders, material planning, and costing all align from the start.

MANUFACTURING

Creating a Production Plan

Updated 2026-07-17

A Production Plan is where Octavion turns demand into a coordinated production schedule. Instead of raising Work Orders and purchase requests one at a time, you consolidate everything you need to make — pulling from sales orders, forecasts, and stock shortfalls — and let the platform generate the paperwork for you.

When to use a Production Plan

- You have several open sales orders that require manufactured items.
- You want to build to a forecast ahead of confirmed demand.
- You need to see, in one place, what to make in-house and what to buy.

Building the plan

- Go to Manufacturing > Production Plan > New.
- Under Get Items From, choose Sales Order, Material Request, or a demand forecast.
- Apply filters — customer, delivery date range, item group — then click Get Sales Orders (or the matching button) to pull open demand.
- Click Get Finished Goods for Manufacture. Octavion lists every item to produce with its required quantity and planned start date.

Checking material availability

Enable **Raw Material Warehouse** and click **Get Raw Materials for Production**. Octavion explodes each BOM, compares required quantities against current stock, and shows the shortfall. This tells you exactly what must be purchased or transferred before production can begin.

Generating documents

Once the plan is reviewed and submitted, use the action buttons to create the downstream records automatically:

- Work Orders for every finished good on the plan.
- Material Requests for raw materials that fall short of stock — routed to purchasing or inter-warehouse transfer.

Octavion links these documents back to the plan, so you can track fulfilment progress from a single screen.

Sub-assemblies and multi-level planning

For products with sub-assemblies, enable **Include Non Stock Items** and let the platform plan each level. Work Orders for lower-level components are created alongside the parent, keeping the whole build sequence coordinated.

Tips for reliable planning

Set realistic planned start dates so scheduling stays achievable, keep BOMs current so material explosions are accurate, and re-run the availability check after any large stock movement. A well-maintained Production Plan removes guesswork and prevents both shortages and over-production.

MANUFACTURING

Raising and Managing Material Requests

Updated 2026-07-17

A Material Request is the formal signal in Octavion that stock is needed — whether to purchase from a supplier, transfer between warehouses, manufacture, or issue to a project. It sits at the heart of the manufacturing supply chain, connecting production demand to procurement and inventory.

Types of Material Request

- Purchase — buy raw materials or components from a supplier.
- Material Transfer — move stock from one warehouse to another (for example, from central stores to a production floor).
- Material Issue — consume stock against a cost centre or project.
- Manufacture — flag items to be produced in-house.
- Customer Provided — track materials supplied by a customer for their order.

Creating a Material Request manually

- Open Manufacturing > Material Request > New (also available from Stock).
- Select the Purpose from the list above.
- Add each item, the Required Quantity, the target warehouse, and the Required By date.
- Save and Submit to release the request into the workflow.

Automatic creation

Most Material Requests are generated for you. A Production Plan raises them for raw-material shortfalls, and reorder rules on an item can trigger one automatically when stock drops below a set level. This keeps buying proactive rather than reactive.

Turning a request into action

From a submitted request, use the action buttons to move it forward:

- Create a Purchase Order or Request for Quotation for purchase-type requests.
- Create a Stock Entry to fulfil a transfer or issue.
- Create a Work Order for manufacture-type lines.

Octavion updates the request status — Pending, Partially Ordered, Ordered, Transferred, or Issued — so you always know what is outstanding.

Tracking and follow-up

Use the Material Request list view with status filters to spot anything stuck in Pending. The **Requested Items to Order** and **Material Requests for which Suppliers are not Set** reports help purchasing clear the backlog. Set an accurate Required By date on every line so priorities are clear and production is never held up waiting on parts.

MANUFACTURING

Running a Work Order

Updated 2026-07-17

The Work Order is the central production document in Octavion. It authorises the shop floor to manufacture a specific quantity of a finished item, reserves the raw materials, drives the operation schedule, and records the finished goods back into stock. Every physical production run should be governed by one.

Creating a Work Order

- Go to Manufacturing > Work Order > New.
- Select the Item to Manufacture. Octavion loads its default BOM automatically — change it if you are using an alternative recipe.
- Enter the Quantity to produce. Required raw materials are calculated from the BOM.
- Set the Source Warehouse (where materials come from), the Target Warehouse (where finished goods land), and the Work-in-Progress warehouse.
- Confirm the planned start date, then Save and Submit.

Work Orders can also be generated in bulk from a Production Plan or directly from a Sales Order, keeping demand and production linked.

Transferring raw materials

Once submitted, click **Transfer** to move required materials into the work-in-progress warehouse via a stock entry. This consumes inventory from stores and shows the job is underway. If you prefer, enable **backflush** so materials are consumed automatically at completion instead.

Executing operations

If the BOM includes operations, Octavion creates a **Job Card** for each one when the Work Order starts. The shop floor logs time against these cards, and their completion updates the Work Order's progress. Machine and labour time captured here feeds actual operating cost.

Finishing the job

- Click Finish to create the manufacturing stock entry.
- Octavion consumes raw materials from work-in-progress and receives the finished item — plus any scrap or by-products — into the target warehouse.
- You can finish partially; the Work Order tracks Produced Quantity against Quantity to Manufacture until the run is complete.

Monitoring and closing

The Work Order shows live status — Not Started, In Process, Completed, or Stopped — along with material transfer and operation progress. Use **Stop** to halt a job that will not continue and release reserved stock. Review the produced quantity and actual versus planned cost before considering the run closed, so variances are caught early.

MANUFACTURING

Job Cards and Shop-Floor Execution

Updated 2026-07-17

Job Cards are how work is executed and tracked on the shop floor in Octavion. Each Job Card represents a single operation from a Work Order — such as cutting, welding, or assembly — carried out at a specific workstation. Operators use them to log time, record output, and flag quality, giving supervisors a real-time view of production.

How Job Cards are created

When a Work Order with operations is submitted, Octavion automatically generates one Job Card per operation, in the correct sequence. You will find them under **Manufacturing > Job Card**, filtered by workstation, operation, or status.

Recording work as it happens

- Open the Job Card for the operation being performed.
- Click Start to begin the time log. Octavion records the operator and the start timestamp.
- Use Pause and Resume for breaks or interruptions so only productive time is counted.
- Enter the Completed Quantity as parts are finished.
- Click Complete to close the time log and mark the operation done.

Each time log captures actual duration, which Octavion compares against the BOM's estimated time to reveal efficiency and true operating cost.

Material consumption at the operation

If materials are issued at specific operations rather than backflushed at the end, record them in the Job Card's **Items** table. This gives precise consumption tracking and keeps work-in-progress inventory accurate stage by stage.

Handling rejects and quality

Record any **Rejected Quantity** directly on the card and add a reason. If an operation is linked to a quality inspection, complete the inspection before the card can be marked done. This prevents defective output from flowing to the next stage.

Supervisor view and flow

- Job Cards must be completed in operation sequence, so the workflow enforces the correct build order.
- Completing every card on a Work Order updates its overall progress toward finished goods.

- Use the Job Card list, filtered by Open or Work In Progress, as a live shop-floor queue.

Tips

Encourage operators to start and stop cards in real time rather than back-filling at day's end — accurate timestamps are what make capacity planning, costing, and on-time delivery estimates trustworthy.

MANUFACTURING

Managing Subcontracting

Updated 2026-07-17

Subcontracting in Octavion lets you send raw materials to an outside supplier who performs part of your manufacturing — plating, machining, stitching, or full assembly — and returns finished or semi-finished goods. The platform tracks the materials you supply, the service charge, and the value added, so your costing and inventory stay accurate even when work happens off-site.

Setting up a subcontracted item

Create a BOM for the item as usual, listing the raw materials the supplier will consume and the operation they perform. Mark the finished item so it can be produced through subcontracting. The supplier is treated as a service provider who charges for their work while consuming your materials.

The subcontracting workflow

- Raise a Subcontracting Order. Select the supplier and the finished item to be produced. Octavion explodes the BOM to list every raw material that must be supplied.
- Transfer supplied materials. Create a stock entry to move raw materials to the supplier's warehouse (or a dedicated subcontractor location). Stock leaves your main stores but remains your asset.
- Receive the finished goods. When the supplier delivers, create a Subcontracting Receipt. Octavion consumes the supplied raw materials, adds the service charge, and receives the finished item at its true landed cost.
- Record the bill. Generate a purchase invoice against the receipt to pay the supplier's service fee.

Tracking supplied materials

Octavion maintains a clear record of materials issued to each subcontractor versus those consumed in received goods. This lets you reconcile stock held by suppliers and identify any shortfall, wastage, or unreturned material. Review it regularly to keep off-site inventory under control.

Costing

The finished item's valuation combines the cost of supplied raw materials plus the subcontracting service charge. Because materials are consumed at receipt, your finished-goods cost reflects both what you provided and what you paid — no manual adjustment needed.

Best practices

- Use a dedicated supplier warehouse so subcontracted stock is easy to isolate and audit.
- Transfer only the quantity needed for the order to limit exposure.
- Reconcile supplied-versus-consumed materials after each receipt to catch discrepancies early.
- Keep subcontracting BOMs current so material transfers and costs stay accurate.

MANUFACTURING

Capacity Planning and Scheduling

Updated 2026-07-17

Capacity planning in Octavion ensures the work you promise can actually be completed on time. By modelling your workstations, their operating hours, and the operations they perform, the platform schedules Job Cards realistically and warns you before a resource is overloaded.

Defining workstations

A **Workstation** represents a machine, cell, or work area where operations happen. For each one, set:

- Working hours — the shifts and daily start/end times available.
- Hourly rates — electricity, rent, consumables, and labour, which feed operating cost.
- Holiday list — non-working days that the scheduler must skip.

Linking operations to capacity

Each **Operation** is tied to a workstation and carries an estimated time per unit in its BOM. When a Work Order is created, Octavion multiplies this time by the quantity to calculate how long each operation will occupy its workstation, then places it in the schedule around existing jobs and non-working days.

How scheduling works

- Submit a Work Order with operations. Octavion computes planned start and end times for each operation.
- Job Cards are slotted into workstation calendars in sequence, respecting working hours and holidays.
- If a workstation is already fully booked, the platform pushes the operation to the next available slot, giving a realistic completion date rather than an optimistic one.

Detecting and resolving overload

Enable capacity checks so Octavion flags when demand exceeds available hours. When a workstation is over capacity you can:

- Reschedule lower-priority Work Orders to a later window.
- Add a shift or extend working hours on the workstation.
- Route the operation to an alternative workstation with spare capacity.

- Subcontract the operation to relieve the bottleneck.

Finite versus infinite capacity

Choose **finite capacity** scheduling when you want the platform to prevent double-booking and give firm dates, or allow overbooking when you plan to manage load manually. Finite scheduling is recommended for constrained resources where realistic promising matters.

Keeping the schedule accurate

Capacity planning is only as good as its inputs. Keep operation times updated from actual Job Card logs, maintain the holiday list, and adjust working hours for shift changes. Review the workstation calendars regularly so the schedule reflects the real shop floor and your delivery commitments stay achievable.

MANUFACTURING

Manufacturing Reports and Analytics

Updated 2026-07-17

Octavion's manufacturing reports turn day-to-day production data into insight — showing what you produced, what it cost, where materials went, and where bottlenecks lie.

Reviewing them regularly helps you improve efficiency, control cost, and keep delivery promises. Find them under **Manufacturing > Reports**, where you can filter, group, and export every view.

Production performance

- Production Analytics — see quantities planned versus produced across a period, grouped by item, item group, or time. Use it to spot output trends and shortfalls against plan.
- Work Order Summary — a status overview of every Work Order (Not Started, In Process, Completed, Stopped) so supervisors can see the whole floor at a glance.
- Job Card Summary — actual time logged per operation and workstation, revealing efficiency against estimates and highlighting slow stages.

Material and inventory insight

- BOM Stock Report — for a chosen BOM and quantity, shows required materials versus current stock, so you can confirm a run is feasible before starting it.
- Work Order Consumed Materials — actual material usage against BOM estimates, exposing over-consumption, wastage, or recording errors.
- Production Plan Summary — tracks fulfilment of planned demand through the Work Orders and Material Requests it generated.

Cost and variance

Compare planned cost from the BOM against actual cost recorded on completed Work Orders. Variances point to price changes, excess scrap, or longer-than-expected operations. Because operating cost is built from workstation rates and real Job Card time, these figures reflect true

production economics rather than estimates.

Working with reports

- Open a report and set the date range, warehouse, and item filters.
- Group rows by item, workstation, or status to surface the pattern you need.
- Export to spreadsheet for deeper analysis or sharing.
- Save your filter set as a view so recurring reviews take one click.

Turning data into action

Use these reports in a regular production review: check output against plan, investigate any Work Order with high cost variance, follow up on Job Cards running well over estimate, and confirm no BOM is short on stock for upcoming runs. Consistent analysis is what steadily lifts on-time delivery and margin across your manufacturing operation.

07

MODULE 07

Projects

7 topics in this module:

- Getting Started with Projects
- Tasks and Dependencies
- Recording Time with Timesheets
- Project Costing and Billing
- Gantt and Kanban Views
- Reusing Work with Project Templates
- Project Reports and Dashboards

PROJECTS

Getting Started with Projects

Updated 2026-07-17

The **Projects** module in Octavion gives you a single place to plan work, assign responsibility, track effort, and control budgets. A project acts as a container that ties together tasks, timesheets, costs, and billing so you always know where the work stands and whether it is profitable.

Creating your first project

- Open the Projects module and select New Project.
- Enter a clear Project Name that your whole team will recognise, such as a client name plus a deliverable.
- Choose a Project Type (for example Internal, External, or Maintenance) so you can group and report on similar work later.
- Set the Expected Start Date and Expected End Date. These drive the timeline views and progress calculations.
- If the work is billed to a client, select the Customer so costs and invoices link back to the right account.
- Assign a Project Manager who owns delivery and receives status notifications.
- Save the project to unlock the tasks, timesheet, and costing tabs.

Understanding the project workspace

Once saved, the project opens into a workspace with several areas:

- Overview — key dates, percentage complete, and health at a glance.
- Tasks — the breakdown of work to be done and who owns each item.
- Timesheets — the hours logged against the project.
- Costing — planned versus actual cost and margin.

Setting the project status

Use the **Status** field to communicate where the project stands: *Open* for active work, *Completed* when delivery is done, and *Cancelled* if the work is stopped. Keeping status accurate ensures dashboards and reports reflect reality.

Tracking progress automatically

Octavion calculates **percentage complete** for you based on the method you choose in project settings — either by the proportion of completed tasks or by task weight. As your team closes tasks, the project progress bar updates without any manual entry.

Tips for a clean start

- Keep project names consistent so they sort and search predictably.
- Fill in start and end dates even if they are estimates; you can refine them later.

- Always link a customer for billable work so invoicing is seamless.
- Add a short description outlining scope so anyone joining the project understands the goal.

PROJECTS

Tasks and Dependencies

Updated 2026-07-17

Tasks are the building blocks of every project. Each task represents a single, assignable unit of work with an owner, a schedule, and a status. Breaking a project into well-defined tasks keeps the team aligned and makes progress measurable.

Adding a task

- Open your project and go to the Tasks tab, then select Add Task.
- Enter a concise Subject that describes the outcome, not just the activity.
- Assign the task to a team member in the Assigned To field so ownership is clear.
- Set the Start Date and End Date to place the task on the timeline.
- Optionally enter an Expected Time in hours to support planning and cost estimates.
- Choose a Priority — Low, Medium, High, or Urgent — to help the team focus.

Building a task hierarchy

For larger deliverables, create a **parent task** and nest child tasks beneath it. Mark a task as a **Group** to turn it into a summary item whose progress rolls up from its children. This lets you organise work into phases such as *Design*, *Build*, and *Launch* while still tracking each detailed step.

Setting dependencies

Dependencies control the order in which work happens. To make one task wait for another:

- Open the task that cannot start until other work is finished.
- In the Depends On section, add the predecessor task or tasks.
- Save. The dependent task is now flagged so it will not be marked ready until its predecessors are complete.

When you shift a predecessor's dates, Octavion highlights downstream tasks that are affected, so you can reschedule the chain without missing a link.

Managing task status

Move tasks through their lifecycle using the **Status** field: *Open*, *Working*, *Pending Review*, *Completed*, or *Cancelled*. A task blocked by an unfinished dependency can be set to *Overdue* visibility automatically when its end date passes.

Best practices

- Keep tasks small enough to finish within a few days for accurate tracking.
- Always set an owner — unassigned tasks tend to stall.

- Use dependencies only where the sequence truly matters, to avoid an over-constrained plan.
- Review overdue and blocked tasks in your weekly check-in to keep the project moving.

PROJECTS

Recording Time with Timesheets

Updated 2026-07-17

Timesheets capture the actual hours your team spends on project work. Accurate time entry feeds directly into project costing, client billing, and productivity reporting, so it is worth building a consistent habit across the team.

Creating a timesheet

- Open the Timesheets area, either from within a project or from the module menu, and select New Timesheet.
- Confirm the Employee — this defaults to you but managers can log time on behalf of others.
- Add one or more time logs, each representing a block of work.

Filling in a time log

For each log line, complete the following:

- Activity Type — the kind of work performed, such as Consulting, Development, or Support.
- Project and Task — link the time to the exact work so costs land in the right place.
- From Time and To Time, or simply enter the Hours directly.
- Billable — tick this if the time can be charged to the client; leave it unticked for internal effort.

Octavion totals the hours automatically and shows both billable and non-billable subtotals at the bottom of the sheet.

Setting billing and costing rates

Each time log can carry a **Billing Rate** and a **Costing Rate**. The costing rate reflects what the hour costs your business, while the billing rate is what the client pays. If default rates are configured for the activity or employee, they populate automatically, and the sheet calculates the **billing amount** and **costing amount** for you.

Submitting for approval

When the sheet is complete, select **Submit**. Depending on your organisation's setup, the timesheet may route to a manager for approval before its hours count toward billing. Submitted timesheets lock to protect the record; use an amendment if a correction is needed.

Tips for reliable time tracking

- Log time daily while the detail is fresh rather than reconstructing a week at once.
- Always link the correct task so effort maps to deliverables.
- Be deliberate about the billable flag — it directly affects revenue.
- Use consistent activity types so reports compare like with like.

PROJECTS

Project Costing and Billing

Updated 2026-07-17

Octavion turns the effort and expenses recorded against a project into a clear financial picture, so you can see whether work is profitable and bill clients accurately. Costing and billing draw on your tasks, timesheets, and linked purchases automatically.

How project costs are built up

A project's **total cost** comes from several sources:

- Time costs — hours from submitted timesheets multiplied by each entry's costing rate.
- Expense claims — approved out-of-pocket expenses linked to the project.
- Purchases — materials or subcontractor invoices allocated to the project.

These roll up on the project's **Costing** tab, where you can compare **estimated cost** against **actual cost** and watch the running margin.

Tracking gross margin

The project shows **total billable amount** alongside **total costing amount**, and calculates **gross margin** and **margin percentage**. A shrinking margin is an early warning that scope or effort is drifting beyond what was quoted, giving you time to act before delivery erodes profit.

Billing a client for project work

To convert billable effort into an invoice:

- Ensure the relevant timesheets are submitted and marked Billable.
- From the project or timesheet, choose Create Sales Invoice.
- Octavion pulls the billable hours and their billing amounts onto the invoice draft.
- Review the lines, add any fixed fees or discounts, and confirm the customer and payment terms.
- Save and submit the invoice, then send it to your client for payment.

Fixed-price versus time-and-materials

For **time-and-materials** projects, invoice periodically from accumulated billable hours. For **fixed-price** projects, raise invoices against agreed milestones instead, while still tracking internal cost so you can measure profitability against the fixed fee.

Keeping billing accurate

- Only submit timesheets you are confident are correct — submitted hours flow into billing.
- Reconcile expenses and purchases to the project promptly so cost figures stay current.
- Review margin at each milestone rather than only at project close.
- Check the billable flag on every time log before invoicing to avoid under- or over-charging.

PROJECTS

Gantt and Kanban Views

Updated 2026-07-17

Octavion offers several ways to visualise the same project data so every role can work the way that suits them. The **Gantt** view is ideal for scheduling and dependencies, while the **Kanban** board is best for day-to-day execution. Switch between views at any time using the view selector above the task list.

Working in the Gantt view

The Gantt chart lays your tasks out along a timeline, with each task drawn as a horizontal bar spanning its start and end dates.

- Reschedule a task by dragging its bar left or right along the timeline.
- Extend or shorten a task by dragging either end of its bar.
- See dependencies as connecting lines, so you can spot how a delay in one task pushes others.
- Zoom between day, week, and month scales to move from detailed scheduling to a high-level roadmap.

Because the Gantt view is linked to the underlying tasks, any change you make on the chart updates the task record instantly and vice versa.

Working in the Kanban view

The Kanban board organises tasks into columns by status, giving your team a clear picture of what is *Open*, *Working*, *Pending Review*, and *Completed*.

- Open the project's Kanban board from the view selector.
- Drag a task card from one column to the next as work progresses.
- Click a card to open the full task and edit details, add comments, or attach files.

Moving a card automatically updates the task's status, keeping reports and progress bars in sync without extra data entry.

Choosing the right view

- Use Gantt when planning, adjusting the schedule, or explaining timelines to stakeholders.
- Use Kanban for stand-ups and tracking flow, where the focus is what to do next.
- Use the List view for bulk edits, filtering, and exporting.

Filtering and focusing

In any view you can filter by assignee, priority, or status to narrow the picture. Save a filtered view you use often so you can return to it in one click, such as *My open high-priority tasks*.

PROJECTS

Reusing Work with Project Templates

Updated 2026-07-17

Many projects follow the same pattern — an onboarding, an installation, a monthly campaign. **Project templates** let you capture that repeatable structure once and spin up a fully populated project in seconds, so you never rebuild the same task list by hand.

Creating a template

- Open the Project Template area from the Projects module and select New.
- Give the template a descriptive Name, such as New Client Onboarding.
- Add each standard task the project should include as a template task.
- For every task, set the Subject, expected duration in days, and a default priority.
- Save the template so it becomes available when creating projects.

Scheduling tasks relative to the start

Rather than fixed calendar dates, template tasks use a **duration** and **offset** from the project start. When you generate a real project, Octavion calculates each task's actual start and end dates from the date you choose, so the whole plan slots into place correctly no matter when the project begins.

Creating a project from a template

- Select New Project and choose your template in the Project Template field.
- Enter the project name, customer, and expected start date.
- Save. Octavion copies every template task into the new project and schedules it from your start date.

You can then adjust individual tasks, add project-specific items, or remove anything that does not apply, without affecting the original template.

Keeping templates useful

- Review templates periodically and fold in improvements your team discovers on real projects.
- Keep task subjects generic enough to apply across clients, then customise per project.
- Maintain a separate template for each distinct delivery pattern rather than one oversized catch-all.
- Include dependency relationships in the template where sequence always matters, so they carry through automatically.

When to use a template

Reach for a template whenever a project is more than half predictable. Even if you customise afterwards, starting from a proven structure reduces setup time, prevents forgotten steps, and gives clients a consistent experience.

PROJECTS

Project Reports and Dashboards

Updated 2026-07-17

Octavion's reporting turns your day-to-day project activity into insight you can act on. Whether you need to check a single project's health or review your entire portfolio, the built-in reports and dashboards draw on live task, timesheet, and costing data — no manual spreadsheets required.

The project dashboard

Each project has its own dashboard summarising the essentials at a glance:

- Percentage complete and a progress bar driven by task completion.
- Estimated versus actual cost and current gross margin.
- Hours logged, split into billable and non-billable.
- Overdue tasks and upcoming milestones so risks surface early.

Portfolio-level reporting

To see across all your work, open the module's report area. Useful standard reports include:

- Project Summary — status, dates, and completion for every active project in one list.
- Project Profitability — billable amount against cost, ranked so you can spot which projects earn or drain.
- Employee Utilisation — billable versus available hours per person, to balance workload.
- Timesheet Analysis — hours by activity, project, or client over any period.

Filtering and grouping

Every report can be narrowed with filters such as date range, customer, project type, or project manager. Group results — for example by customer or by status — to reveal patterns, and reorder or hide columns to focus on the figures that matter to your audience.

Saving and sharing views

- Apply the filters and grouping you want.
- Save the configuration as a named view so you can reopen it instantly.
- Export the results to a spreadsheet or PDF when you need to share outside the platform.

Building a custom dashboard

You can assemble a personal dashboard from chart and number cards — for instance, a chart of hours logged per week, a count of overdue tasks, and a margin gauge. Pin the cards that reflect your responsibilities so the metrics you care about greet you each time you open the module.

Making reports part of your routine

- Review project profitability at every milestone, not only at close-out.
- Watch utilisation weekly to catch overloaded or underused team members.
- Schedule a regular export for stakeholders who work outside the platform.
- Act on overdue and margin alerts promptly — reports are only valuable when they drive decisions.

08

MODULE 08

CRM & Sales

9 topics in this module:

- Working with Leads
- Managing Deals and Opportunities
- Contacts and Organizations
- The Sales Pipeline and Stages
- Activities: Calls, Tasks, Notes, and Emails
- Saved Views and Filters
- Email & WhatsApp Outreach in Advanced CRM
- CRM Reports and Dashboards
- Advanced CRM ↔ Call Center Integration

Working with Leads

Updated 2026-07-17

A **Lead** in Octavion CRM represents an unqualified prospect — a person or company that has shown interest but has not yet been vetted as a genuine sales opportunity. Leads are your top-of-funnel records: you capture them quickly, qualify them, and then convert the good ones into Deals.

Creating a lead

- Open the Leads section from the left sidebar.
- Click + Create in the top-right corner.
- Enter the prospect's details: first and last name, organization, email, mobile number, and job title.
- Set the Status (for example New, Contacted, or Qualified) and the Lead Owner — the salesperson responsible.
- Optionally record the Source (website, referral, campaign, cold call) so you can later measure which channels perform best.
- Click Save.

Qualifying a lead

Open any lead to see its detail page. The right panel holds the lead's fields; the center timeline records every interaction. Use the **Activities** tabs to log calls, add notes, create follow-up tasks, and send emails without leaving the record. As you learn more, update the **Status** field to reflect where the lead stands.

Converting a lead to a deal

Once a lead is qualified and worth pursuing, convert it:

- Open the lead and click Convert to Deal.
- Octavion creates a linked Contact and Organization from the lead's details automatically, so you never re-type information.
- Review the new Deal record, set an estimated value and expected close date, and place it in the correct pipeline stage.

Importing leads in bulk

To load a list from a trade show or a purchased list, use **Import** from the Leads list view. Download the sample spreadsheet, map your columns to Octavion fields, and upload. Review the preview before confirming so duplicates and formatting errors are caught early.

Assigning and prioritizing

Select one or more leads in the list view to assign an owner, change status, or apply a tag in bulk. Assigning a lead notifies that user and adds the record to their queue. Combine tags and statuses with *saved views* so each rep sees only the leads they should be working today.

Tip: Respond to new leads quickly. The timeline timestamps make it easy to audit response times, and fast follow-up is the single biggest driver of conversion.

CRM & SALES

Managing Deals and Opportunities

Updated 2026-07-17

A **Deal** (also called an opportunity) is a qualified sales prospect that you are actively working toward a close. Where a Lead answers “*is this worth pursuing?*”, a Deal tracks “*how do we win it, for how much, and by when?*”.

Creating a deal

- Open the Deals section and click + Create, or convert a qualified lead (which pre-fills the deal for you).
- Link an Organization and a primary Contact so the deal is tied to the people involved.
- Enter the Deal Value (expected revenue) and the Expected Close Date.
- Choose the Pipeline Stage — for example Qualification, Proposal, or Negotiation.
- Assign a Deal Owner and click Save.

Key deal fields

- Probability — the likelihood of winning, used to calculate weighted forecast value. Each stage can carry a default probability that updates automatically as the deal advances.
- Close Date — drives your forecast periods and highlights deals that are slipping.
- Status — Open, Won, or Lost. When you mark a deal Lost, record a reason so you can analyze why business is slipping away.

Working a deal to close

Open a deal to reach its workspace. The center timeline captures the full history — emails, calls, notes, tasks, and stage changes — giving anyone who picks up the deal instant context. Add multiple contacts to a deal to map the buying committee, attach quotes and documents, and schedule the next action as a task so nothing goes cold.

Advancing and closing

Move a deal forward by changing its stage from the record or by dragging its card on the *Kanban pipeline board*. When you win, click **Mark as Won**; the deal is stamped with a close date and drops out of your active pipeline while remaining in reports. When you lose, mark it **Lost** and select a reason.

Forecasting

Because every open deal has a value, close date, and probability, Octavion can roll them up into a weighted forecast. Filter your Deals list by owner, stage, or close month, then switch to a *report or dashboard* to see committed and projected revenue for the period.

Tip: Keep the **Expected Close Date** honest. A pipeline full of past-due close dates is the clearest sign a forecast needs a clean-up.

CRM & SALES

Contacts and Organizations

Updated 2026-07-17

Octavion CRM separates the people you deal with (**Contacts**) from the companies they belong to (**Organizations**). Keeping these as distinct, reusable records means one company can have many contacts, and a single contact's history stays intact even as their deals come and go.

Contacts

A Contact is an individual — a decision-maker, influencer, or day-to-day user. Each contact record holds names, email addresses, phone numbers, job title, and the organization they work for.

- Open the Contacts section and click + Create.
- Enter the person's name and at least one way to reach them (email or mobile).
- Link them to an Organization — start typing to pick an existing company or create a new one inline.
- Save. From now on, this contact can be attached to any number of leads and deals.

Organizations

An Organization represents a company or account. Its record stores the industry, website, annual revenue, number of employees, address, and territory. Open an organization to see every contact who works there and every deal associated with it in one place — a true account view.

- Open the Organizations section and click + Create.
- Enter the company name and any firmographic details you have.
- Save, then add contacts either from here or from each contact's own record.

Linking records

Relationships are what make the CRM powerful. When you attach a contact and organization to a deal, that deal automatically appears on both records' timelines. Open any organization to answer questions like *“who are we talking to here, and what's in flight?”* without searching.

Avoiding duplicates

Before creating a new contact or organization, type the name into the search box — Octavion surfaces matches as you type so you can reuse an existing record instead of creating a duplicate. When importing, the preview step flags likely duplicates so you can merge rather than multiply.

Keeping data clean

- Use consistent organization names (agree on “Acme Trading LLC” vs “Acme”) so accounts don't fragment.

- Record a primary contact per organization to signal your main point of contact.
- Add tags for segments such as VIP, Reseller, or region to power saved views and targeted outreach.

Tip: A well-maintained organization record is your single source of truth for an account — invest a minute keeping it accurate and every report downstream improves.

CRM & SALES

The Sales Pipeline and Stages

Updated 2026-07-17

Your **sales pipeline** is the visual map of every open deal, organized by the stage it has reached on the way to a close. Octavion CRM presents it as a **Kanban board** — columns for each stage, with each deal shown as a card you can drag forward as it progresses.

Opening the Kanban board

- Go to the Deals section.
- Switch the view selector at the top from List to Kanban.
- Each column is a pipeline stage; each card is a deal, showing its value, owner, and organization at a glance.

Moving deals through stages

To advance a deal, drag its card from one column to the next — for example from *Proposal* to *Negotiation*. Octavion records the stage change on the deal's timeline with a timestamp, and if you have configured default probabilities per stage, the deal's win probability updates automatically. You can also change the stage from inside the deal record if you prefer.

Understanding the default stages

A typical pipeline flows through stages such as:

- Qualification — confirming budget, authority, need, and timeline.
- Proposal — a quote or proposal has been sent.
- Negotiation — terms and pricing are being finalized.
- Won / Lost — the deal has closed one way or the other.

Customizing your stages

Every business sells differently, so you can tailor the stages to match your process:

- Open the pipeline settings from the board or the CRM settings area.
- Add, rename, or reorder stages so the columns mirror how your team actually sells.
- Assign each stage a default probability so forecasts weight themselves correctly.

Keep the number of stages small and meaningful — five to seven is usually enough. Too many stages create friction and inconsistent data.

Reading the board

The Kanban view is also a health check. A column that is overloaded signals a bottleneck; deals sitting in one stage for too long signal stalled opportunities. Use the *filters* above the board to show one owner, one territory, or one close month, so managers and reps can each focus on the slice of pipeline they own.

Tip: Run your weekly pipeline review directly on the Kanban board. Walk the columns from right to left — closest-to-close first — so the conversation stays focused on the deals that matter this period.

CRM & SALES

Activities: Calls, Tasks, Notes, and Emails

Updated 2026-07-17

Every meaningful interaction with a prospect is an **activity**. Octavion CRM logs calls, tasks, notes, and emails directly on each lead and deal, building a complete, timestamped history you and your teammates can rely on. The **timeline** in the center of every record is where these activities live.

Logging a call

- Open a lead or deal and select the Calls tab.
- Click Create Call Log.
- Record the outcome, duration, and a short summary of what was discussed.
- Save — the call appears on the timeline and rolls up into the contact's and organization's history.

Where telephony is connected, inbound and outbound calls can be logged automatically, so reps spend less time on data entry.

Creating tasks and reminders

Tasks keep deals moving. From the **Tasks** tab, click **Create Task**, give it a title, a due date, a priority, and an assignee. Tasks appear on the record and in the assignee's personal task list, and Octavion can remind them as the due date approaches. Always set the *next action* as a task before closing a record for the day — it is the simplest way to stop deals going cold.

Adding notes

Notes capture context that isn't a call or an email — a competitor mentioned, a budget cycle, a personal detail. Open the **Notes** tab, click **Add Note**, and write freely. Notes are visible to everyone with access to the record, so the next person always has the full story.

Sending and logging emails

From the **Emails** tab you can compose and send messages without leaving the CRM. Sent and received emails are threaded onto the timeline automatically once your mailbox is connected, so the record shows the entire conversation in order. You can insert reusable *email templates* to keep messaging consistent and fast.

Reading the timeline

The timeline interleaves every activity type in chronological order — calls, tasks, notes, emails, and stage changes — with the newest at the top. Use the tab filters to isolate a single activity type when you only want to see, say, the email thread. Because activities cascade to the linked contact and organization, opening an account gives you its full relationship history at a glance.

Tip: Treat the timeline as the source of truth. If it isn't logged in Octavion, it didn't happen — that discipline is what makes handovers, coverage during leave, and manager reviews painless.

CRM & SALES

Saved Views and Filters

Updated 2026-07-17

Octavion CRM can hold thousands of leads, deals, contacts, and organizations. **Filters** and **saved views** let each person cut that data down to exactly the records they need to act on — and save that cut so it's one click away next time.

Filtering a list

- Open any list — Leads, Deals, Contacts, or Organizations.
- Click Filter above the list.
- Choose a field (such as Status, Owner, Stage, Close Date, or a tag), an operator (equals, before, contains), and a value.
- Add more conditions to narrow further — for example Owner = me and Stage = Negotiation and Close Date = this month.

The list updates instantly as you build the filter.

Sorting and grouping

Use **Sort** to order records by value, close date, or last activity so the most urgent rise to the top. You can also choose which columns are visible and reorder them, tailoring the list to the way you work.

Saving a view

Once a filter, sort, and column layout is useful, save it so you never rebuild it:

- With your filters applied, open the views menu and choose Save View.
- Give it a clear name — My Open Deals This Month, Untouched Leads > 7 Days, Enterprise Accounts.
- Choose whether it's a private view (just for you) or a public view (shared with the team).

Saved views appear as tabs or in the views list, so switching context is a single click.

Public views for the team

Public views standardize how everyone works. A sales manager might publish *Deals Closing This Quarter* or *Stalled Deals* so the whole team looks at the same definition of what matters. Individuals still keep private views for their personal workflow.

Putting views to work

- Build a daily work queue view: your open items sorted by last activity, oldest first.
- Build a manager review view: the whole team's deals in Negotiation closing this month.
- Build segment views by territory, industry, or tag to drive focused campaigns.

Tip: Start each day in a saved view rather than the full list. It removes decision fatigue and ensures nothing important slips through the cracks.

CRM & SALES

Email & WhatsApp Outreach in Advanced CRM

Updated 2026-07-17

Advanced CRM lets you reach prospects through their preferred channel — email or WhatsApp — from inside the record you are working on, and it logs every message to the timeline automatically. No copy-pasting between apps, and no lost history. One important thing to know up front: WhatsApp in Octavion runs exclusively through the official WhatsApp Business Platform (by Meta). You connect your own WhatsApp Business account, and no unofficial channels are ever used — which is what keeps your business number safe from blocking and your messaging compliant.

What you can do here

- Email Accounts — connect your own mailbox in Settings so messages go out from your real address and replies are threaded back onto the lead or deal. Shared team inboxes can be connected too, keeping support and sales conversations attached to the right account.
- Email templates — reusable messages with merge fields (the contact's name, organization, or deal value) so each send is personalized automatically.
- WhatsApp connection — link your WhatsApp Business Platform (by Meta) account in Settings. This is a requirement, not an option: WhatsApp features stay inactive until your own business number and credentials are connected.
- WhatsApp conversations on the record — a WhatsApp tab on every contact and deal where you compose messages, use approved message templates for the first outbound contact, and read incoming replies in the same thread — all logged to the record's timeline next to calls, notes, and emails.

Step by step

Connect your email

- Open Settings and go to Email Accounts.
- Add your mailbox by entering your address and the incoming and outgoing server details your email provider supplies.
- Send a test message to confirm the connection. From then on, emails composed from a lead or deal go out through your own address, and replies land back on the record.

Connect WhatsApp

- Open Settings and choose the WhatsApp integration.
- Enter the credentials from your own WhatsApp Business Platform (by Meta) account, including your registered business phone number and access token.
- Save and send a test message to verify the connection.

Send your first WhatsApp message

- Open any contact or deal and switch to the WhatsApp tab.
- For a first outbound contact, select an approved message template; inside an active conversation you can type freely.
- Review the personalized text and send. The reply appears in the same thread and on the record's timeline, so the whole conversation lives beside your calls, notes, and emails.

Tips & troubleshooting

- WhatsApp requires pre-approved templates to start a conversation outside the customer's response window — set these up in advance so your reps are never blocked mid-outreach.
- If WhatsApp sending fails, check the connection first: an expired access token or a missing business number in Settings is the most common cause.
- Respect opt-outs. If a contact asks to stop, tag the record and stop messaging that channel.
- Keep sensitive data out of message bodies; link colleagues to the CRM record instead.
- Let the prospect's own behavior choose the channel: if they reply on WhatsApp, stay on WhatsApp. Meeting people where they already are lifts response rates dramatically.

CRM & SALES

CRM Reports and Dashboards

Updated 2026-07-17

Octavion CRM turns the activity your team logs every day into insight. **Dashboards** give managers an at-a-glance view of pipeline health and performance, while **reports** let anyone slice the underlying leads, deals, and activities to answer a specific question.

Opening your dashboard

Select **Dashboard** from the sidebar to see your headline metrics: open pipeline value, deals won and lost this period, conversion rate, and activity volume. Each tile is interactive — click through to the records behind a number to investigate.

Key charts to watch

- Sales funnel — how many records sit at each stage, and the conversion rate between stages. A funnel that pinches sharply at one stage points to where deals stall.
- Pipeline by stage — total value in each stage, so you can see whether enough is entering the top to hit targets later.

- Forecast — weighted value of open deals by close month, using each deal's probability.
- Win/loss — closed deals over time, with lost-reason breakdowns to reveal recurring objections.
- Activity leaderboard — calls, emails, and tasks per rep, so you can connect effort to outcomes.

Building a report

- Open the list you want to analyze — for example Deals.
- Apply filters to scope the data (owner, stage, close month, territory).
- Group the records by a field such as stage, owner, or source to see subtotals.
- Save the configuration as a saved view so the report is one click away for the whole team.

Common questions reports answer

- Which lead sources produce the most won deals? Group won deals by source.
- Who is carrying the pipeline? Group open value by owner.
- Why are we losing? Group lost deals by lost reason.
- What's slipping? Filter open deals with a close date in the past.

Reviewing performance

Use dashboards to run consistent cadences: a daily glance at activity, a weekly pipeline review on the funnel and forecast, and a monthly win/loss retrospective. Because every chart is fed by the same records your reps update, the numbers stay live — there is no separate spreadsheet to reconcile.

Tip: A dashboard is only as honest as the data behind it. Pair reporting reviews with a quick data-hygiene check — past-due close dates, deals with no next task, missing values — so decisions rest on clean numbers.

CRM & SALES

Advanced CRM ↔ Call Center Integration

CRM & Sales

When your workspace has both Advanced CRM and Call Center, the two products behave like one system. Phone numbers in the CRM become live call buttons, every call your team handles is written back to the customer's CRM record automatically, and a caller in your call history can become a CRM lead in one click — no copying, no retyping, no lost context. This article explains exactly what the integration does and how to use each piece.

What you can do here

- Click-to-call from the CRM — click any phone number on a lead, deal, or contact in Advanced CRM and the call starts through the Call Center: your own web phone rings first, and when you pick up, Octavion dials the customer. Nothing to copy or paste, and no number can be misdialed.
- Automatic call logging — every call handled in the Call Center, inbound and outbound, appears in the CRM's Call Logs within about 2 minutes, labeled Octavion Call Center, with the call's direction,

duration, and status. Your sales team sees the complete phone history on the record without anyone logging a call by hand.

- Send to CRM from your call history — open any call in Call Center > Calls and use the Contact panel: type the caller's name, click Save contact to store them in the Phone Book, then click Send to CRM to create a lead from the call. Use + More details (company, email, notes) to enrich the lead with what you learned before sending it.
- Duplicate-safe leads — if the caller already exists in your CRM, the button shows In CRM ✓ instead, so the same person is never created twice no matter how many times they call.
- One clean number format — numbers are stored in international format (such as +9715...), so the same customer is recognized across both products no matter how the number was originally dialed or typed.

Step by step: turn a caller into a lead

- Open Call Center > Calls and select the call — for example, this morning's inquiry from a new number.
- In the Contact panel, type the caller's name in the Caller name field and click Save contact. From now on, that name replaces the raw number across the Call Center.
- Optionally click + More details (company, email, notes) and fill in what you learned on the call.
- Click Send to CRM. Octavion creates the lead in Advanced CRM with the caller's name and number already filled in, and the button changes to In CRM ✓.
- Open the lead in Advanced CRM — the phone history for that number follows automatically in Call Logs, and from now on you can call the customer back simply by clicking their number on the record.

Tips & troubleshooting

- Click-to-call rings your web phone first, so keep a Call Center tab open and your web phone signed in — otherwise there is nothing to ring. If a call does not start, check that your extension shows as registered.
- If the button reads Send to CRM (needs CRM), your workspace does not have an active Advanced CRM subscription. You can add it anytime from Add more apps in your Workspace.
- Call Logs entries appear within about 2 minutes of a call ending. If you hung up seconds ago, give the record a moment before refreshing.
- Both directions count: calls your agents place from the dialer and calls customers make to your numbers are logged on the matching CRM record in exactly the same way.
- Make saving the caller's name a habit at the end of every call — a Phone Book full of real names instead of raw numbers pays off across call history, live views, and the CRM alike.

09

MODULE 09

Call Center

48 topics in this module:

- Agents & Extensions
- Inbound & Outbound Calling
- Queues & Call Routing
- Campaigns and the Auto-Dialer
- IVR & Call Flows: Shaping the Inbound Caller...
- Call Recordings & Voicemail
- Live Monitoring & Wallboards
- The AI Voice Agent
- Speech Analytics, Script Compliance & ROI
- Call Flow: Business Hours, Greetings & Smart...
- Queue Announcements & Hold Messages
- The Phone Book
- Messaging: WhatsApp Campaigns, Meta Inbox & ...
- Call Dispositions
- Activity Schedule
- Ads Integration
- AI Agent
- Preferred Agent Routing
- Analytics: KPIs, Formulas, and Workforce Ins...
- Auto-Dialer
- Automation Builder
- Call Blocking
- Caller ID Rules
- Call History
- AI Coaching Reports
- AI Compliance & Campaign Review
- Conversion & ROI Tracking
- Extensions
- Form Tracking
- Call Scenarios (IVR): The Visual Menu Design...
- Lead Generator
- Overview: Your Customizable Call Center Dash...
- Phone System (PBX)
- Quality Monitoring: Evaluations, AI Prefill ...
- Queues
- Call Recordings
- Reports: Performance Dashboards and Data Exp...
- Ring Groups
- Script Compliance: Playbook Adherence Scoring
- Call Center Settings
- Speech Analytics: Sentiment, Topics & Agent...
- Supervisor: Live Monitoring, Call Coaching, ...
- Tags
- Transcription Rules

Agents & Extensions

Updated 2026-07-17

In Octavion Call Center, an agent is a platform user who holds a Call Center seat and has been given a **SIP extension** — the short internal number (such as 1001) that their web phone registers with. Once those two things are in place, the person can make and take calls straight from the browser, with no desk hardware and nothing to install. This article explains how the pieces fit together and how to bring a new agent on board.

What you can do here

- Add people in Settings → Team — every agent starts as a team member. Adding someone to Call Center requires a paid Call Center seat; if no seat is free, the assignment is blocked until you add one (pricing is shown at checkout).
- Assign Extension on Call Center → Extensions — pick the agent from the drop-down and Octavion issues the next free extension number automatically; the number cannot be hand-picked. Assigning requires supervisor or administrator rights. The agent's web phone picks up its connection details on its own the next time they open Call Center — there is nothing to configure on their side.
- Watch status at a glance — the Extensions screen shows every agent's live state (Available, On Call, Wrap-up, Break, Training, or Offline) together with today's Calls, Avg Handle time, and CSAT score.
- Put agents into queues — on Call Center → Queues, add each agent to the queues they serve, give them a priority from P1 to P20, and set their language. Priority order decides who is offered a waiting call first.
- Supervise — supervisors and administrators additionally get the Wallboard for real-time team status and the supervisor tools, while standard agents see their own calls only.

Step by step

- Open Settings → Team and add the person, making sure a Call Center seat is available for them.
- Go to Call Center → Extensions, press Assign Extension, select the new agent, and confirm. The dialog shows the extension number that was issued.
- Ask the agent to sign in and open any Call Center page. Their web phone registers automatically; the browser asks for microphone access the first time — this must be allowed.
- Open Call Center → Queues and add the agent to the right queues with a priority and a language.
- Confirm the agent shows Available on the Extensions screen. They are now ready to take calls.

Tips & troubleshooting

- An agent only receives calls while a Call Center tab is open in their browser — the web phone lives in the tab. Offline on the Extensions screen usually just means the person has no Call Center tab open right now, not that anything is broken.

- An agent can be signed in on more than one device or tab at the same time; all of them ring together, and the call can be answered on whichever is closest.
- If the Assign Extension drop-down is empty, every current agent already has an extension. If the button refuses with a permissions message, ask an administrator to make the assignment.
- Keep queue membership current as people cross-train — routing changes apply from the agent's next call, with no restart needed.

CALL CENTER

Inbound & Outbound Calling

Updated 2026-07-17

Day-to-day calling in Octavion Call Center happens right inside your browser. Every agent gets a built-in web phone — no desk hardware or separate app required — backed by your shared Phone Book, a colleague directory, and a complete call history on the **Calls** screen. This article walks through placing calls, receiving them, and wrapping them up so every conversation is logged and measurable.

What you can do here

- **New Call** — the button at the top of the Calls screen opens the web phone. On the Keypad tab, type into the Enter number or extension field or tap the on-screen digits, then press the green call button; the backspace key erases the last digit. When your account has more than one company number, the New Call window also lets you choose which of them is presented as your Caller ID, or keep the line default.
- **Directory** — the web phone's second tab lists your colleagues with their extension and live availability. Use Search people to filter, then click a name to call their extension directly.
- **Answer / Decline** — when a call arrives, a popup shows the caller's number and, if the number is saved in your Phone Book, their name. Answer to connect; Decline to release the call for the next available agent.
- **Mute, Hold, and Transfer** — during a call you can silence your microphone, place the caller on hold (they hear music while they wait; press again to Resume), or open Transfer to and hand the call to a colleague chosen from the live list.
- **Wrap-up dialog** — when the call ends, a dialog records the outcome: pick a Disposition, add a Reason where the disposition calls for one, type Notes, and optionally save the caller to your Phone Book under a name so every future call from that number is identified. If your subscription includes Advanced CRM, you can also send the caller there as a lead.

Receiving calls in your browser

The web phone lives inside your browser tab, and this is the single most important thing to understand about inbound calling: **to receive calls, keep any Call Center page open in a browser tab**. It does not matter which page — Calls, your dashboard, or anything else inside Call Center — as long as one tab is open, your extension is registered and will ring. If no Call Center tab is open,

your phone is effectively powered off, exactly like an unplugged handset: callers wait in the queue for another agent or follow your Call Flow fallbacks (announcements, callback, voicemail).

You can be signed in on several devices or tabs at once — for example your office computer and a laptop — and all of them ring together; answer on whichever is closest. The first time you take a call on a device, allow microphone access when the browser asks.

Step by step

- Open Call Center → Calls and press New Call.
- On the Keypad tab, enter the full number — or switch to Directory and pick a colleague.
- Check the Caller ID for the call and change it if you want a different company number presented.
- Press the green call button and wait for the connection. Use Mute, Hold, or Transfer as needed while talking.
- When you hang up, complete the wrap-up dialog — disposition, notes, and (for new callers) a Phone Book name.

Tips & troubleshooting

- “The queue rang but nothing popped up on my screen.” Almost always this means no Call Center tab was open at that moment. Keep one pinned open through your shift.
- No audio? Confirm the browser has microphone permission for Octavion and that the correct input device is selected in your operating system.
- Every call — answered, missed, or declined — is logged on the Calls screen with direction, duration, agent, queue, and any recording, so nothing needs writing down by hand.

CALL CENTER

Queues & Call Routing

Updated 2026-07-17

Routing decides which agent a caller reaches and what the caller experiences on the way. In Octavion Call Center the pieces work together: **Call Flow** answers the call and decides where it goes, **Queues** hold callers in line and distribute them to your team, and supporting screens — **Announcements**, **Agent Routing**, **IVR**, and the **Wallboard** — shape and monitor the journey. This article maps the whole picture.

What you can do here

- Call Center → Queues — create a queue with a Name, a Language (Arabic, English, or Both), an SLA answer target in seconds, and an ACW (after-call work) window in seconds. Staff it by adding agents with a priority from P1 (offered first) to P20, drag the agent pills to reorder, and read the live tiles — Offered, Answered, Abandoned, SLA %, ASA (average speed of answer), and Abandon % — on every card.

- Call Center → Call Flow — the front door for inbound calls: business hours, greetings, menu choices, which queue answers, callback offers, voicemail with email notification, and a satisfaction survey at the end. After-hours handling lives here, so no caller ever reaches a dead end.
- Call Center → Announcements — write the messages waiting callers hear periodically while they hold; the text is turned into speech for you.
- Call Center → Agent Routing — preferred-agent routing: returning callers are steered to the agent they spoke with before, when that agent is available, so relationships stay with the same person.
- Call Center → IVR — build “press 1 for Sales” style menus that send callers to the right destination.
- Call Center → Ring Groups — define groups of extensions with a ring strategy. Note: ring groups are currently saved as configuration only and are not applied to live call routing — the page says so at the top. Route live calls with queues and Call Flow.
- Call Center → Wallboard — the real-time view of queue activity, agent states, and today's numbers.

Step by step

- On Queues, press New Queue, name it (for example Support), pick the language, set the SLA target and ACW time, and press Create.
- On the new queue's card, use the Add Agent row to add each team member with a priority and a language.
- Open Call Flow and point your inbound flow at the queue, then set the after-hours branch — voicemail, a callback offer, or an announcement.
- Optionally add waiting messages under Announcements.
- Place a test call and watch it move across the Wallboard.

Tips & troubleshooting

- Priority order is the routing: the available agent with the lowest P number is offered the call first. Drag pills to change the order — the change applies from the next call.
- A dash in a queue tile means “not measured yet” (no calls offered), never zero performance.
- Creating, staffing, and deleting queues requires supervisor or administrator rights. Deleting a queue stops calls routing to it, and the screen asks you to confirm first.
- If callers ring out with nobody answering, check the Wallboard: the usual cause is that no agent on the queue currently has a Call Center tab open — the web phone only rings while a tab is open.

CALL CENTER

Campaigns and the Auto-Dialer

Updated 2026-07-17

An outbound campaign lets your team work through a call list systematically instead of dialing each number by hand. In Octavion Call Center, campaigns are built and run on the **Auto-Dialer** page: you load a contact list, choose a dialing style, decide which of your own numbers appears on recipients' phones, and Octavion places the calls and keeps score — dialed, answered, failed — while a progress bar tracks the run in real time.

What you can do here

The page opens with four summary tiles — **Campaigns**, **Total Dialed**, **Answered**, and **Answer Rate** — that roll up every campaign in your account. Below them, each campaign is a card showing its name, its dialer type, how many contacts it holds, the caller ID it presents, a colored status badge (*draft*, *running*, *paused*, *completed*, or *failed*), live **Dialed**, **Answered**, and **Failed** counters, and a percent-complete progress bar.

When you create a campaign you choose one of three dialing styles in the **Dialer Type** field:

- Sequential works through the list one contact at a time, in order — the safest choice for small lists and careful conversations.
- Power keeps a steady stream of calls going so your team is rarely idle between conversations.
- Predictive dials ahead of availability to maximize talk time on large lists — use it when volume matters more than a perfectly paced handoff.

The **Caller ID** selector lists the numbers registered to your account, plus a **Trunk default** option that uses your calling line's standard number. Only numbers your account actually owns can be presented — the phone network replaces anything else — so the dropdown you see is the honest set of choices. **Max Concurrent** caps how many calls may be in flight at once, and **Retry Attempts** sets how many times an unanswered or busy number is tried again.

Step by step

- Open Call Center → Auto-Dialer and click New Campaign.
- Enter a Campaign Name your team will recognize later.
- Pick the Dialer Type, the Caller ID, Max Concurrent, and Retry Attempts.
- Fill the Contacts box with one contact per line in the form phone, name — for example +971501234567, Ahmed Hassan — or click Import from Phone Book to pull in your saved contacts, then click Create.
- The campaign appears as a card in draft status. Press the green Play button to start dialing, Pause to hold it, and the square Stop button to end it — a stopped campaign is marked completed.
- Click the card at any time to open the detail view: a table of every contact with their Name, Phone, Status, Attempts, call Duration, and Result, so you can see exactly who was reached and who needs a follow-up.

Tips & troubleshooting

- Calls do not dial out? Outbound campaigns place real calls over your connected calling line. If your SIP trunk is not yet registered, campaigns can be created and staged but nothing will dial —

check Call Center → PBX → SIP Trunks and look for a green Registered state.

- Respect your recipients. Call during reasonable local hours, identify your organization at the start of each call, and honor requests not to be contacted again. Clean your list before you load it — the dialer calls exactly what you give it.
- Start small. Run a short Sequential campaign first to confirm your caller ID and audio quality, then scale up with Power or Predictive dialing.
- Use the trash icon on a card to delete a campaign you no longer need; the summary tiles update immediately.

CALL CENTER

IVR & Call Flows: Shaping the Inbound Caller Journey

Updated 2026-07-17

An IVR (Interactive Voice Response) is the automated experience callers get before a person answers — “Press 1 for Sales, press 2 for Support.” In Octavion Call Center you shape this journey in two places: the **Call Flow** page, which runs your live inbound experience today, and the **Call Scenarios (IVR)** designer, a visual workspace for drafting multi-step menus. This article explains what each one does and where to start.

What you can do here

Call Flow — your live inbound journey

The **Call Flow** page (Call Center → Call Flow) is where the complete caller journey is configured and live: **Business hours** for every day of the week plus holidays, a **Welcome greeting**, a **Recording disclaimer**, a **Language / department menu** that routes keypad presses 1–3 to your own queues, **Callback from queue** so waiting callers can keep their place and hang up, **After-hours voicemail** emailed to you with the recording attached, a post-call **Satisfaction survey (CSAT)**, and an optional **Missed-call WhatsApp** follow-up (this last one requires your own account on the official WhatsApp Business Platform (by Meta) to be connected first). You type plain text; Octavion generates the spoken voice, lets you preview it, and auto-saves — no Save button and no technical steps. For the full field-by-field walkthrough, see the article “Call Flow: Business Hours, Greetings & Smart Call Handling.”

Call Scenarios (IVR) — the visual designer

The **Call Scenarios (IVR)** page lets you sketch richer, multi-step menus from building blocks — **Message**, **Menu**, **Connect** (to an agent or an external number), **Voicemail**, **Business hours**, and **Hang up** — and chain them together in any order. Be aware of what is live: the scenario's name, the number it answers, and its **Active** switch apply to your line, while the step-by-step routing you draw is saved with the scenario but is not yet what answers real calls — the page shows a clear notice about exactly this. For greetings, keypad routing, voicemail, and surveys that are live today, use the Call Flow page.

Step by step: a working inbound experience

- Open Call Center → Call Flow and set your Business hours, including any holidays.
- Enable the Welcome greeting and, if you record calls, the Recording disclaimer.
- Enable the Language / department menu and point each key at one of your queues.
- Turn on Callback from queue, After-hours voicemail with a notification email, and the Satisfaction survey.
- Preview every prompt with the built-in player — what you hear is exactly what callers hear.
- Optionally, draft future menu ideas in Call Scenarios (IVR) so they are ready when you want to expand.

Tips & troubleshooting

- Keep menus short — three options or fewer cover most needs, and callers should always be able to reach a person.
- Menu keys on the Call Flow page route only to your own queues, so a typo can never send callers somewhere outside your account.
- What waiting callers hear inside a queue — the repeating hold message — is configured separately on the Queue Announcements page.
- If your phone line is not yet provisioned, both pages store your settings and apply them the moment the line is activated.

CALL CENTER

Call Recordings & Voicemail

Updated 2026-07-17

Octavion Call Center keeps an audio trail of your conversations and a shared inbox for the messages you miss. **Recordings** is the searchable library of captured calls — playback, AI summaries, transcription, and sentiment — while **Voicemail** collects what callers leave when nobody can answer. Together they make sure no conversation, and no missed caller, disappears without a trace.

What you can do here

- Call Center → Recordings — recordings of captured calls appear here automatically. Search by caller, agent, queue, or a keyword from the conversation; filter by sentiment; press play to listen inline. Expanding a recording shows its AI Summary and the action row: Voice-to-Text generates a full speaker-by-speaker transcript, Download saves the audio, Share copies a link for a colleague, Flag for Review marks the call for quality or compliance follow-up, Save to contacts names the caller in your Phone Book, and Send to CRM creates a lead in Advanced CRM (available when Advanced CRM is part of your subscription).
- Delete a recording — deletion is permanent and deliberately takes two clicks: press Delete, then Click again to delete within a few seconds. Only administrators and supervisors can delete.

- Call Center → Voicemail — each message shows the caller, the extension it was left for, its length, and when it arrived. Press play to listen, expand a message to read its transcript (this also marks it as read), and use the trash icon to remove it.
- Voicemail-to-email — enable it in Call Center → Call Flow and every new voicemail is also emailed to you with the audio attached, so messages reach you even when you are away from Octavion.
- Where voicemail comes from — the after-hours and no-answer branches of your Call Flow decide when a caller is offered voicemail, so a whole team can share one inbox and nothing slips through.

Step by step

- Open Call Center → Recordings and search for the caller's number or the agent's name, or narrow the list with the sentiment filter.
- Press the round play button to listen, or click the row to expand it and read the AI Summary first — it turns a long call into a few seconds of reading.
- Need the detail? Press Voice-to-Text for the full transcript, speaker by speaker.
- Act on what you heard: Flag for Review for coaching, Save to contacts so the caller is named next time, or Send to CRM to start a lead.
- Then check Call Center → Voicemail for anything left while the team was busy, listen or read each message, and call the person back.

Tips & troubleshooting

- Many jurisdictions require telling callers they may be recorded — put that notice in your Call Flow greeting so every recorded call starts with it.
- Recordings can contain personal information: keep deletion rights with supervisors, download only when necessary, and share links thoughtfully.
- Deleting a voicemail message removes it immediately, so listen or read the transcript before you clear it.
- Use flagged recordings as a coaching library — strong example calls are the best training material for new agents.

CALL CENTER

Live Monitoring & Wallboards

Updated 2026-07-17

Running a call center well means seeing problems while they are still small: a queue backing up, an agent stuck on a hard call, a wave of missed calls. Octavion Call Center gives you two screens for that real-time pulse — the **Wallboard**, a big-screen display for the whole room, and the **Supervisor** console, where you act on what you see.

What you can do here

Open **Call Center** → **Wallboard** for the shared display. Five large tiles show **Calls** in the last 24 hours, **Answered** with the answer rate, **Waiting** in queue right now, customer satisfaction (**CSAT** from real surveys, or the AI **Sentiment** average until surveys exist), and **SLA** — the share of calls answered within your target seconds. Cards below cover **Queue Status** (waiting callers per queue, highlighted the moment anyone is on hold), **Agents Online** with a live status dot per person, and a **Last 24 Hours** summary of wait, handle time, missed calls, and answer rate. The board refreshes itself every 15 seconds — no clicking needed.

Open **Call Center** → **Supervisor** to intervene. The monitoring tab lists every active call with four controls: **Listen** to monitor silently, **Whisper** to coach the agent privately — the caller cannot hear you — **Barge** to join as a three-way call, and **Takeover** to take the call yourself. The same screen shows live counters for success, lost, missed, and waiting calls, and how many employees are free, talking, or on inbound and outbound calls.

Both screens show each agent's current status — available, on a call, on break, and so on — with their extension, so if someone forgot to go available you know exactly who to prompt. To rebalance the flow itself, adjust routing under **Call Center** → **Queues** or **Agent Routing**, and offer callbacks through the **Callback Widget** when wait times spike.

Step by step

- Put the Wallboard on a shared monitor at the start of the shift.
- Watch the Waiting tile and the Queue Status card; a growing number is your early warning.
- When a call needs help, open Supervisor, find it under Active Calls, and use Listen, then Whisper or Barge as the situation demands.
- If an agent is stuck in the wrong status, correct it from the Agents tab with Set status.
- After the shift, open Reports and Analytics to turn what you saw into staffing and routing changes.

Tips & troubleshooting

- Keep your SLA answer-time target realistic — a tile that is never green trains the team to ignore it.
- Missed counts only genuinely unanswered inbound calls, never outbound attempts the other side declined, so the wallboard number is one you can act on with confidence.
- Whisper and Barge connect through your own extension — keep your phone registered before you need it in a hurry.

CALL CENTER

The AI Voice Agent

Updated 2026-07-17

The AI Voice Agent is Octavion's hands-free copilot. Press the microphone button in the top bar, speak naturally in Gulf Arabic or English, and it navigates the platform, answers questions from your live business data, and carries out real work — from dialing a number

to creating a sales invoice — while your hands stay free. It is available on every page, and it is built for speed: it acts immediately and replies in one short sentence, so a command like "open the phone book" or "■■■ ■■■■■■■■ ■■■■■■■■" is done almost as fast as you can say it. It detects the language you speak and always answers in that same language.

What you can do here

- Start and stop with one button. The microphone button sits in the top bar on every page. Click it once to connect — your browser asks for microphone permission the first time only — and the microphone button lights up orange while the assistant is live. Click it again to end the session.
- Open any part of the platform by voice. Say "open the queues," "take me to Call Flow," "show recordings," or "■■■■■ ■■■■■■■■" and the page opens instantly. This covers all the main Call Center pages (including Phone Book, Call Flow, Announcements, and the Quality scorecard), deep Advanced CRM pages (leads, deals, tasks, notes, contacts, organizations, call logs), and Smart ERP lists (customers, suppliers, items, sales invoices, purchase invoices, quotations, employees, tasks). Pages open in an overlay on top of your current screen with an Octavion AI still listening badge, so the voice conversation never drops — use Open in new tab to keep the page, or Close to return to where you were.
- Ask live business questions. "How many calls today?", "Any missed calls?", "How are my agents doing?" — the answers come from your real, current data. The assistant never invents numbers; if the data is not there, it says so.
- Do real Smart ERP work. "Create a customer called Al Noor Trading," "Add item Coffee at 20 dirhams," "Make a sales invoice for Al Noor for 5,000 dirhams," "How many unpaid invoices do I have?" It creates, finds, and counts real records, and it repeats a money amount back once before creating an invoice. It never deletes records — deletion is deliberately left to you, done manually on the record itself.
- Place and transfer calls. Say "call 0501234567" or "call Ahmed" (a saved Phone Book contact). The assistant always repeats the number back digit by digit and asks you to confirm before dialing — and it will refuse to dial without your clear yes. This is a deliberate safety rule: an unconfirmed call to a wrong number is a real call to a stranger. Your own headset rings first, then the destination. During an active call, say "transfer to Carol" or "transfer to extension 1008" to hand the call to a colleague.
- Build your Phone Book and CRM by voice. "Save this number as Ahmed" stores a contact in the Phone Book, so future calls from that number show a name instead of digits. "Send Ahmed to the CRM" creates a real lead in Advanced CRM — and the assistant tells you honestly if your plan does not include Advanced CRM, or if the lead already exists, so no duplicates are created.
- Print what you see. Voice printing is designed for Call Center pages: say "print this report" and the assistant prints the current page. On Smart ERP and Advanced CRM screens the assistant tells you to use that screen's own Print control instead.
- Learn and stay oriented. Ask "how do I set up an IVR?" or "teach me how to add an agent" and it walks you through the workflow step by step, then offers to open the right screen. It always knows the current page, today's date, and the time in the UAE — just ask.

Step by step

- Click the microphone button in the top bar. The first time, allow microphone access when your browser asks. The microphone button lights up orange once the assistant is live.
- Speak your command in Arabic or English — for example, "Call Ahmed." The assistant detects your language and answers in it.
- Listen as it reads the number back digit by digit: "zero five zero one two three four five six seven — correct?"
- Say "yes" (or "■"). Your headset rings; answer it and the call connects to the destination. If a digit is wrong, correct it and the assistant repeats the full corrected number once before asking again.
- Keep going — "save this number as Ahmed," "send it to the CRM," "open calls." The session stays live until you click the microphone button again to end it.

Tips & troubleshooting

- It answers in one short sentence on purpose. The assistant is a voice command interface, not a chatbot — it acts first and confirms briefly. If you want more detail, ask a follow-up.
- It will not dial without confirmation. If it seems to pause before a call, that is the safety rule working: confirm the number and it dials immediately.
- Opening one specific record by voice is not supported yet. Asking for "the lead for Al Noor" opens the right list; tap the record you want from there.
- If a small "Voice error" note appears near the microphone button, the connection dropped — click the button to reconnect.
- Keep talking while pages load. Navigation opens in the overlay precisely so your conversation continues; you never need to restart the session after opening a page.

CALL CENTER

Speech Analytics, Script Compliance & ROI

Updated 2026-07-17

Octavion Call Center turns conversations into measurable data. Three connected tools close the loop: **Speech Analytics** shows how calls actually go, **Script Compliance** checks that agents follow your playbook, and **Conversion & ROI** connects calling to revenue. All three read from your recorded and AI-analyzed calls, so call recording and transcription must be running before numbers appear.

What you can do here

Open **Call Center** → **Speech Analytics** and pick a **7d**, **30d**, or **90d** window. Four tiles report **Calls Analyzed**, **Avg Sentiment** on a scale from -1 to +1, **Positive Rate** — the share of analyzed calls that felt positive — and **Topics Detected**. Below them, the **Sentiment Distribution** donut splits calls across five moods, **Top Conversation Topics** ranks what customers called about, and the **Agent**

Sentiment Ranking orders your team by how their conversations land. The page is read-only and shows a dash, not a zero, until calls have been analyzed.

Open **Call Center** → **Script Compliance** to grade calls against your process. Press **New Script** and fill in the **Script Name**, a **Category** (sales, support, onboarding, retention, or general), the **Sections** a good call should contain — first line is the section title, steps beneath, blank line between sections — plus **Required Phrases** and **Forbidden Phrases**, one per line. Then press **Score a Call**, pick a transcribed call and a script, and the AI returns an overall score, the phrases matched, missed, or violated, and written coaching feedback. Tiles track **Script Templates**, **Calls Analyzed**, **Avg Compliance**, and **Violations**; the **Compliance History** tab keeps every result with agent, score, and date.

Open **Call Center** → **Conversion & ROI** to see the money. Tiles show **Total Spend**, **Revenue** from tracked calls, **ROAS** (return on ad spend), **Cost Per Lead**, and **Conversions**, and a table breaks calls, leads, spend, revenue, and conversion rate down per source. The setup panel is where accuracy comes from: enter your average **Revenue per conversion**, connect your advertising accounts so spend imports automatically, and add the **Dynamic Number Insertion** snippet to your website so each visitor sees the tracking number that matches their source. Manage those numbers under **Call Center** → **Call Tracking**, which also holds the **Source Attribution** view.

Step by step

- Confirm recordings are being transcribed — every tool here reads from analyzed calls.
- In Script Compliance, press New Script and write your required sections and phrases.
- Press Score a Call weekly on a sample of each agent's calls and review the feedback together.
- In Call Tracking, give each marketing source its own tracking number.
- In Conversion & ROI, set Revenue per conversion and watch which sources pay off — then shift budget toward them.

Tips & troubleshooting

- Conversion numbers depend on agents setting a disposition on every call from the Calls screen — make wrap-up a habit.
- Score a Call stays disabled until at least one script exists; create the script first.
- Sentiment measures the conversation, not the agent alone — read a low score together with the transcript before coaching on it.

CALL CENTER

Call Flow: Business Hours, Greetings & Smart Call Handling

Call Center

The **Call Flow** page (Call Center → Call Flow) shapes everything a caller experiences before an agent answers: hours, greeting, keypad menu, callback instead of holding, after-hours voicemail, and

post-call follow-up. You never record audio or touch technical settings — you type plain text, and Octavion turns it into a natural spoken voice. Each part of the journey is a card you can switch on or off independently, so you can start small and grow at your own pace.

What you can do here

- Business hours — set an open and close time for each day of the week, or check Closed to shut a day completely. Times follow the timezone shown on the card, and overnight windows (for example 20:00 to 04:00) work correctly. In the Holidays field, list full-closure dates as YYYY-MM-DD, separated by commas. Until you set hours, the line answers around the clock; once set, calls outside them go to the after-hours flow.
- Welcome greeting — the first thing callers hear the moment the line answers. Type your welcome sentence (up to 500 characters).
- Recording disclaimer — a legal notice that the call may be recorded, played before the caller is connected.
- Language / department menu — a simple keypad menu (“For Arabic press 1, for English press 2”). Assign keys 1, 2, and 3 to any of your own queues, or leave a key as — not used —.
- Callback from queue — while waiting, the caller presses 1 to keep their place in line and hang up; your agents see the callback request and return the call.
- After-hours voicemail — a closed message, then the caller records after the beep. Enter an address in Email to notify and each voicemail arrives in your inbox with the recording attached as an audio file.
- Missed-call WhatsApp — automatically messages callers you missed. The card includes a text box where you write the message itself — that exact text is what missed callers receive. This requires your own account on the official WhatsApp Business Platform (by Meta); without it, this step is safely skipped and the rest of the flow is unaffected.
- Satisfaction survey (CSAT) — after the agent hangs up, the caller is asked to rate the call from 1 to 5 on the keypad. The score appears on the call record and on your Quality page.

Every spoken card has a **preview player** so you hear exactly what callers hear — play, pause, scrub, and a speed button that cycles 1× → 1.25× → 1.5× → 0.75×. There is no Save button: the page **auto-saves** about two seconds after you stop typing, and a status pill in the corner confirms “Saved — voice prompts regenerated and live.”

Step by step

- Open Call Center → Call Flow and set your Business hours for each day, checking Closed where needed.
- Switch on Welcome greeting, type your text, and press play on the preview to hear it.
- If you route by language or department, enable the Language / department menu, write the prompt, and point keys 1–3 at your queues.
- Enable Callback from queue, After-hours voicemail (with a notification email), and the Satisfaction survey as you see fit.

- Pause after each change and watch the status pill confirm the save — your changes are live for the next call.

Tips & troubleshooting

- Editing one card regenerates only that prompt's audio.
- If any part of the flow ever fails, calls automatically fall back to the standard answer path. Your line never goes dark because of a flow setting.
- The banner “No phone system is provisioned on this account yet” means your settings are stored and apply once your line is activated.
- Keep menu prompts short and put the most-chosen option first — callers decide within a few seconds.
- What callers hear while waiting inside a queue is configured separately on the Queue Announcements page.

CALL CENTER

Queue Announcements & Hold Messages

Call Center

The **Queue Announcements** page (Call Center → Queue Announcements) controls what callers hear while they wait in a queue. Instead of leaving people alone with hold music, you can reassure them in your own words — “Thank you for holding, one of our team will be with you shortly” — at an interval you choose. You type the sentence, Octavion turns it into a natural spoken voice, and the queue plays it on repeat, woven in between the hold music. Each queue has its own card, so Sales and Support can say different things.

What you can do here

- One card per queue — each card shows the queue's name, its extension number, when the announcement was last updated, and a status badge: Live (the announcement is playing for waiting callers) or Off (callers hear music only).
- Message box — type what waiting callers should hear, up to 400 characters (a live counter keeps track, and at least 5 characters are required). Write it exactly as it should be spoken.
- Repeat — how often the announcement plays while a caller waits: every 15, 30, 45, 60, 90, or 120 seconds. Thirty to sixty seconds suits most queues.
- Voice pace — the speaking speed of the generated voice: Calm · 0.85×, Natural · 1×, Brisk · 1.15×, or Fast · 1.25×. This changes what callers actually hear.
- Preview player — once an announcement is live, a built-in player appears so you can listen before callers do: play, pause, scrub through, and a speed button that cycles 1× → 1.25× → 1.5× → 0.75×. The preview speed is only for your own review — it never changes the caller's audio (use Voice pace for that).

- Save & generate voice / Save & regenerate — creates the spoken audio and puts it live in the queue. While it works you will see Generating voice..., then a confirmation that the voice is live.
- Remove — switches the announcement off for that queue and clears the saved text; waiting callers go back to hearing music only. Copy your text somewhere first if you plan to bring the announcement back later — re-enabling it means typing the message again and saving.

Step by step

- Open Call Center → Queue Announcements and find the card for the queue you want.
- Type the message in the text box — short, warm, and specific beats long and generic.
- Pick a Repeat interval and a Voice pace.
- Click Save & generate voice and wait a few seconds while the voice is created.
- Press play on the preview player to hear exactly what callers will hear; adjust the text or pace and click Save & regenerate until it sounds right.

Tips & troubleshooting

- Changes apply to the queue right away — there is no downtime, and calls already in progress are not interrupted.
- If the page tells you to write the announcement first, your message is under the 5-character minimum.
- Avoid promises you cannot keep (“we will answer within one minute”) — a simple thank-you and reassurance ages much better.
- If the page says “No phone queues are provisioned on your account yet,” your Call Center phone line has not been set up; the cards appear automatically once your queues exist.
- Looking for the greeting, keypad menu, or after-hours behavior instead? Those live on the Call Flow page — this page is only about the wait inside a queue.

CALL CENTER

The Phone Book

Call Center

The Phone Book is your company's shared directory of saved callers, and it does far more than store numbers. The moment you save a contact, that person's name replaces their raw number everywhere it appears — in Call History, on the incoming-call popup your agents see, and throughout your reports — so everyone knows who is on the line before they pick up. Matching is format-proof: numbers are compared on their last nine digits, so a contact saved with an international prefix still matches when the same person calls in a local format.

What you can do here

- Search — the search box at the top filters the directory by name, number, or company as you type, and the counter beside it shows how many contacts you have.

- Add contact — opens a window with fields for Number, Alt number, First name, Last name, Company, Email, and free-form Notes. A number and at least a first name are required; everything else is optional.
- Edit — each row has an Edit button that reopens the same window with the details filled in. While editing, the main number is locked so the contact's identity stays stable; you can change everything else, including the alternate number.
- Call history & agent notes — the edit window also shows this contact's complete call record: each call's direction (In or Out), its status, its duration, the agent who handled it, the outcome the agent chose (with its reason when one was recorded), any notes the agent wrote, and the exact date and time. Because matching uses the last nine digits, the history covers every dialing format of the same number.
- Delete — removes the contact from the directory. Past calls are not deleted; the number simply goes back to showing as a raw number.
- Export CSV — downloads the whole directory as a spreadsheet file with number, name, company, email, alternate number, and notes for each contact.

The Phone Book also feeds the rest of the Call Center: the Auto-Dialer can build a campaign audience with **Import from Phone Book**, the Preferred Agent Routing screen lets you pick a caller straight from your saved contacts when creating a rule, and the AI voice assistant can act on a contact when you refer to them by name.

Step by step

- Open Phone Book in the Call Center menu.
- Press Add contact.
- Enter the caller's Number — international format such as +9715... works best — and at least a First name.
- Add the Company, Email, Alt number, and any Notes your team should see when this person calls.
- Press Save. The name now appears on this caller's rows in Call History and on the popup the next time they call.

Tips & troubleshooting

- You do not have to come to this page to save a caller — after any call, the call details panel in Call History has a Save contact button that files the caller here automatically.
- If a saved name is not showing on a call, edit the contact and compare numbers: the last nine digits must match the caller's number. Storing a second number in Alt number also helps agents recognize the caller at a glance.
- Notes are limited to 500 characters — keep them short and operational, such as the customer's preferred language or account reference.
- Deleting is immediate and there is no undo, but you can always re-add the contact; their call history reappears with them, since it is matched by number.

CALL CENTER

Messaging: WhatsApp Campaigns, Meta Inbox & Live Chat

Call Center

The **Messaging** group in the Call Center menu turns your phone operation into a full conversation hub: WhatsApp campaigns and replies, messages from your Facebook page and Instagram account, extra chat channels, and live chat on your website — one place, one team, one history. Every WhatsApp feature works exclusively through the official WhatsApp Business Platform (by Meta): you connect your own WhatsApp Business account, and no unofficial channels are ever used — which is what keeps your number safe from blocking.

What you can do here

- Campaigns — bulk or targeted WhatsApp campaigns built in a five-step wizard: Audience, Validate, Compose, Schedule, Review & Send. Each campaign then reports its Audience, Valid WA, Sent, Delivery, and Read figures.
- AI Compliance — opens the compliance tools, where AI checks conversations and scripts against the rules you define, keeping outbound messaging on-policy.
- WhatsApp Inbox — every reply to your campaigns lands here as a conversation. Open a thread to chat, click Assign to me to take ownership, and mark it Resolve when finished — or Reopen if the customer returns.
- Meta Inbox — messages from your Facebook page (Messenger) and Instagram account in one queue, with live counters for Messenger, Instagram, Unread, and Total. Pick a conversation, read the history, and reply without leaving Octavion.
- Messaging Channels — connect extra chat channels (Telegram, Viber, Facebook Messenger) with Add Channel: pick the Channel Type, set a Channel Name, and enter the channel's connection details. Each channel shows its own counters, a Connected or Disconnected badge, and a pause toggle.
- Live Chat — opens Octavion Chat, which puts a live-chat widget on your own website. Its link appears here once your account subscribes to Octavion Chat.

Step by step: your first campaign

- Open Messaging > Campaigns and start a new campaign. In Audience, enter a Campaign Name and add recipients: Upload CSV (one name, phone per line), Paste or Type Numbers, or Import from Systems to pull contacts already in Octavion.
- In Validate, run Number Validation. Octavion checks which numbers can receive WhatsApp messages and shows the Validation Results — no wasted sends.
- In Compose, write your message — or describe your offer to the AI Content Generator and it drafts the text in English, Arabic, Russian, or Spanish. The Message Preview shows what recipients will see, personalization included. Use Edit Message to fine-tune, and Attach Media for

an image, video, or PDF up to 16 MB.

- In Schedule, pick Send Now or Schedule for Later (date and time, Gulf Standard Time) and set a Sending Speed to suit your list size.
- In Review & Send, check the Campaign Summary — audience, message, timing — then launch. A live Sending Progress bar tracks the send, and delivery and read figures update as they happen.

Tips & troubleshooting

- The WhatsApp API Not Configured banner means your WhatsApp Business account is not connected yet. Add your credentials under Settings > Meta & WhatsApp — until then you can build and preview campaigns, but not send.
- Replies land in WhatsApp Inbox — have someone watch it after a large send.
- Send to your own team first to check wording and media, and respect opt-outs — clean lists keep delivery rates high and your number's reputation intact.

CALL CENTER

Call Dispositions

Call Center

Dispositions are the outcomes your agents record when a call ends — the one-line answer to how the call went, such as Booked, Not interested, or Follow up. This page is your account's own outcome dictionary: administrators define the exact list agents choose from in the after-call window and in the Call History details panel, and every change applies to the whole team immediately. A well-chosen vocabulary is what turns your call log into a management tool, because these outcomes flow straight into reporting and coaching.

What you can do here

- Dispositions — the main card shows your current outcomes as removable chips. Type into New disposition... and press Add (or Enter) to append one; press the small x on a chip to remove it. The label in the card's corner tells you whether you are on the Built-in defaults or already using a Custom vocabulary for this company.
- Follow-up reason — optionally pick one disposition that should prompt the agent for a reason. When an agent selects that outcome, a second dropdown appears asking why, drawn from the reason list you manage in this card with its own New reason... field and Add button. This is ideal for outcomes like a lost booking, where the why matters as much as the what. Choose — No disposition asks for a reason — to switch the prompt off entirely.
- Save vocabulary — publishes your changes. From that moment, agents see exactly this list in the after-call popup and in Call History. The button stays disabled while the list is empty — a vocabulary must contain at least one outcome.
- Reset to defaults — discards your custom list and restores the built-in vocabulary. It is only active once a custom vocabulary is in place.

Step by step

- Open Dispositions under Call Center settings.
- Remove the outcomes that do not fit your business by pressing the x on each chip.
- Type each outcome your team actually uses into New disposition... and press Add.
- If one outcome deserves an explanation, select it under Follow-up reason and build the reason list the same way.
- Press Save vocabulary. A confirmation appears, and agents see the new list on their very next call.

Tips & troubleshooting

- This page is for administrators. If you see the message Administrators only, ask an admin on your account to make the change.
- Removing an outcome does not rewrite history: calls that were already saved keep the outcome they were given — new calls simply cannot pick it anymore.
- To rename an outcome, remove the old chip, add the new spelling, then save. Reports will show both spellings for the period where each was in use.
- Keep the list short — roughly six to ten outcomes. Agents pick faster, pick more consistently, and your outcome reports stay readable.
- If you experiment and regret it, Reset to defaults takes you back to the built-in list in one click.

CALL CENTER

Activity Schedule

Call Center

Activity Schedule is where you define your call center's named working-time windows — *Business hours*, *Ramadan hours*, *Weekend shift* — each with a start and end time. Keeping these windows in one list gives your team a single, printable reference for when the center is considered active.

What you can do here

The page is a simple, fast list with a handful of precise controls:

- Add — opens a window with three fields: Name (required), From, and To. The time fields use your device's native time picker, so entries are always valid times rather than free-typed text like 9am or 0900.
- Search — filters the table by any visible column as you type.
- Status filter — when your entries carry a status, a dropdown appears beside the search box to show only matching rows.
- Print and CSV — print the current list or download it as a dated spreadsheet file; both respect whatever search or filter is applied.
- Trash icon — removes a schedule from its row.

The table shows each schedule's **Name**, **From** and **To** times, and **Status**. When entries were created by different people, a **Created By** column appears automatically so you can see who added what.

One honest limitation, also shown as a note on the page itself: schedules saved here are stored to your account but do not control live call routing yet. Their job today is documentation and coordination. To change how live calls are actually handled during and after business hours — greetings, voicemail, callbacks — use the **Call Flow** page, which drives real routing.

Step by step

- Click Add in the top corner.
- Type a clear Name — name the audience, not the time: Sales team weekdays beats Schedule 1.
- Set From (for example 09:00) and To (for example 18:00) with the time picker, then click Save.
- Repeat for each distinct window you operate — a split shift is simply two schedules, such as Morning 09:00–13:00 and Evening 16:00–20:00.
- Use Print or CSV whenever you need to share the current timetable with the team.

Tips & troubleshooting

- Times are entered through the picker in 24-hour form, which prevents the classic 9:00 AM / 9:00 PM mix-up.
- There is no edit-in-place: to change a window, delete the row and add it again with the corrected times — it takes seconds.
- If the list is empty you will see No records yet; nothing is wrong — just add your first schedule.
- Remember the routing note above: setting 09:00–18:00 here does not by itself make calls behave differently at 19:00. Configure the live after-hours behavior in Call Flow.

CALL CENTER

Ads Integration

Call Center

Ads Integration connects your advertising accounts so their spend, clicks, and conversions flow into the Call Center automatically. Combined with your tracked calls, that gives you real return-on-ad-spend and cost-per-acquisition numbers in one place — no spreadsheet stitching.

What you can do here

Two connection cards sit at the top:

- Google Ads — press Connect Google Ads and enter your developer token, client ID, client secret, refresh token, and customer ID. Once linked, campaign spend, clicks, and conversions are pulled from your own account.
- Meta Ads (Facebook / Instagram) — press Connect Meta Ads and enter a long-lived access token and your ad account ID (it starts with act_).

Each card shows a *Connected* or *Not connected* badge, and after linking, its button changes to **Update credentials**. The **Sync Now** button in the top corner pulls the latest spend from every connected platform — it stays disabled until at least one platform is linked — and a *Last sync* panel reports how many rows each platform returned.

For platforms without a connector — TikTok, Snapchat, or anything else — or to backfill older periods, press **Manual Entry** and record a row yourself: the platform, campaign name, date, spend, impressions, clicks, and conversions.

Four tiles summarize the last thirty days: **Total Spend** (in AED), **Total Clicks**, **Conversions**, and **Avg CPA**. The **Spend Records** table below lists every row with platform, campaign, date, spend, impressions, clicks, click-through rate, and conversions.

Step by step

- Press Connect Google Ads or Connect Meta Ads and paste your credentials. These come from your own ad accounts — Octavion reads only what you authorize.
- Press Sync Now and check the Last sync panel to confirm rows arrived.
- Add any offline or unconnected-platform spend through Manual Entry.
- Read the tiles and the Spend Records table here for the raw picture, then open Conversion & ROI to see the same spend matched against revenue and ROAS.

Tips & troubleshooting

- Sync Now is grayed out? No platform is connected yet — link one first; the button's tooltip says the same.
- A platform showing Not connected in the sync results was skipped, not failed; other connected platforms still sync normally.
- Credentials can be replaced at any time with Update credentials; saving new keys overwrites the old ones.
- Manual entries and synced rows live side by side in the same table — use consistent campaign names so the two match up in reports.

CALL CENTER

AI Agent

Call Center

The AI Agent page is your written guide to Octavion. Open **Call Center** → **AI Agent**, type a question in plain language — "How do I add an agent to a queue?" — and it explains the answer step by step, then offers to open the right screen for you. It is the fastest way to learn any part of the platform — Call Center, Smart ERP, Advanced CRM, or Octavion HR — without hunting through menus.

What you can do here

- Ask anything in the question box. The box at the bottom of the page reads Ask how something works, or where to find it... — type your question and press the send button (or Enter). A brief Thinking... indicator shows while the assistant prepares its answer.
- Start from a suggestion. On a fresh conversation the page shows Your Octavion guide with four one-tap starters: Open the Call Center dashboard, How do I add an agent to a queue?, How do I create a sales invoice?, and Take me to the quality scorecard. Tap any of them to see how the assistant responds.
- Read formatted answers. Replies come back as clean, readable explanations — with headings, bold highlights, bullet lists, and tables where they help.
- Jump straight to the screen. When an answer relates to a specific page, a teal button appears under it — tap the button and that screen opens, so you can immediately do the task you just learned.
- Keep the conversation going. Ask follow-up questions in the same thread to go deeper — "and how do I remove them from the queue later?" — and the assistant builds on what you already discussed.

Step by step

- Open Call Center → AI Agent from the sidebar.
- Type your question — for example, "How do I create a sales invoice?" — and press send.
- Read the step-by-step explanation it returns.
- Tap the teal button under the answer to open the screen it describes, and follow the steps there.
- Come back and ask a follow-up whenever you get stuck — the conversation stays on the page.

Tips & troubleshooting

- This page teaches and navigates — it does not report numbers. For live answers from your business data ("how many calls today?", "any missed calls?") and for hands-free commands like dialing a number or creating a record, use the voice assistant instead: press the microphone button in the top bar on any page. See "The AI Voice Agent" article for the full list of voice commands.
- Be specific for better answers. "How do I set business hours in Call Flow?" gets a sharper walkthrough than "help with calls."
- If a connection error banner appears under the conversation, your internet connection likely dropped for a moment — simply send the question again.

CALL CENTER

Preferred Agent Routing

Call Center

Preferred Agent Routing gives repeat callers a familiar voice — and it is live on your line, not just a report. When a caller with a routing rule dials in, their preferred agent's phone rings first for 15

seconds; only then does the call fall into the normal queue. A regular customer usually reaches the person who knows their file, and never waits longer than anyone else if that person is busy. Rules match the caller's exact number first, then fall back to the last nine digits, so the same customer is recognized no matter which dialing format their call arrives in.

What you can do here

- Overview cards — three cards at the top summarize the feature: Routing Rules (how many rules exist), Unique Callers (how many distinct numbers are covered), and Repeat Calls (the total calls these rules have matched).
- Add Rule — the button in the top right opens the Add Routing Rule window with three inputs. Caller Number can be chosen from the — Pick from Phone Book — dropdown, which lists your saved contacts by name with their number, or typed manually in international format (+971...). Preferred Agent is a dropdown of your agents. Routing Type offers three behaviors: Preferred (try this agent first, then fall back to the queue), Exclusive (only this agent takes the call), and VIP (the caller is placed in a priority queue).
- Rules table — every rule appears as a row showing the Caller Number, the Preferred Agent it points to, the Type badge, Total Calls matched so far, and the Last Call date and time. The trash icon at the end of a row deletes that rule immediately.

Step by step

- Open Agent Routing in the Call Center menu.
- Press Add Rule.
- Pick the caller from — Pick from Phone Book — if you have already saved them, or type their number in international format.
- Choose the Preferred Agent who should receive their calls.
- Leave Routing Type on Preferred unless you have a specific reason not to (see the tips below).
- Press Add Rule. The rule is live at once — the very next call from that number rings the chosen agent first.

Tips & troubleshooting

- With the Preferred type, callers are never stranded: if the chosen agent does not answer within 15 seconds, or is offline, the call simply joins the normal queue like any other.
- Use Exclusive sparingly. It sends the caller only to that one agent, which is right for a dedicated account manager but means the caller is not offered to the rest of the team.
- Save your callers in the Phone Book first — the picker in the Add Rule window is faster and avoids typing mistakes, and the caller's name will show on the incoming-call popup as well.
- If a rule never seems to match, check the number format: matching uses the exact number first and then the last nine digits, so a rule saved with too few digits will not catch anything.
- Total Calls and Last Call update as matched calls arrive, which makes this table an easy way to confirm the rule is working after your customer's next call.

CALL CENTER

Analytics: KPIs, Formulas, and Workforce Insights

Call Center

Analytics is the deep-numbers screen for your call center: a full KPI suite across calls, agents, queues, campaigns, workforce time, WhatsApp messaging, and sales — with the exact formula printed on each metric card, so nobody has to guess what a percentage means. Choose a period, pick a tab, and export any view.

What you can do here

At the top, choose your window with the **7d**, **14d**, **30d**, or **90d** buttons. **CSV** downloads the current tab's data as a spreadsheet, **PDF** opens the print dialog for a saved report, and **Refresh** reloads the figures. A live strip beneath shows **live calls** right now (with a pulsing dot when any are active), **agents online**, minutes handled in the last 24 hours, and the current **SLA** with its answer-time threshold.

Seven tabs cover the ground. **Overview**: **Total Calls**, **Answer Rate**, **Avg Handle Time**, **SLA %**, **Answered**, **Missed**, **Avg Wait Time**, and **Avg Sentiment** — Missed counts only genuinely unanswered inbound calls. **Agent**: team averages for **AHT**, **ATT**, **Hold**, **Occupancy**, and **FCR**. **Queue**: a formula reference plus totals for offered, answered, and abandoned calls, average **SLA %**, **Transfer Rate**, and **Queue Occupancy**. **Campaign**: **Total Outbound**, **Avg Connect Rate**, and **Total Conversions**. **Workforce**: occupancy, schedule adherence, shrinkage, and utilization definitions with team averages and total talk and break minutes. **WhatsApp**: the message funnel — **Sent**, **Delivered**, **Read**, **Failed** — with delivery, read, and failure rates plus chat KPIs such as first response time, resolution time, closure rate, and CSAT; these figures require your own WhatsApp Business account connected through the official WhatsApp Business Platform (by Meta). **Sales**: **Total Leads**, **Converted**, **Lead Conversion**, **Bookings**, **No-Shows** and their rate, revenue per booking, and average order value.

Below the tabs, one customizable chart board holds every chart and table on the page: volume trends, direction splits, hourly and day-by-hour heatmaps, sentiment and topics, per-agent workload and handle-time components, queue comparisons, campaign performance, workforce time breakdowns, WhatsApp funnels, and conversion charts, plus the full **Agent Performance Leaderboard** and **Queue Detail** tables. Drag the ■ handle to rearrange, switch chart styles, resize, remove, or restore cards with **+ Add chart** — your layout is saved to your account and follows you to any computer.

Step by step

- Open Call Center → Analytics and pick a period, for example 30d.
- Start on Overview for the headline numbers, then drill into the tab that owns your question — Queue for wait problems, Agent for coaching, Sales for revenue.
- Read the formula printed on each KPI card so the whole team argues about the same definition.
- Press CSV to take the current tab into a spreadsheet, or PDF for a printable report.

Tips & troubleshooting

- The CSV always matches the active tab — the Agent tab exports the full per-agent KPI set, the Queue tab the per-queue set, and so on.
- An empty WhatsApp tab means no messages were sent in the period, or the WhatsApp connection has not been configured yet.
- Sentiment-based figures cover only calls the AI has analyzed, so they can trail total volume.

CALL CENTER

Auto-Dialer

Call Center

The **Auto-Dialer** runs automated outbound calling campaigns for your team. You build a contact list, choose a dialing style, and Octavion places the calls for you — tracking how many were dialed, answered, and failed, contact by contact, so nothing on the list is forgotten.

What you can do here

At the top, four tiles summarize all campaigns: **Campaigns** (how many exist), **Total Dialed**, **Answered**, and **Answer Rate** (answered as a percentage of dialed). The **New Campaign** button opens the creation window with these fields:

- Campaign Name — the label shown on the card and in reports.
- Dialer Type — Sequential, Predictive, or Power. Sequential works the list one call at a time; Power keeps calls flowing steadily; Predictive dials ahead to maximize volume on large lists.
- Caller ID — a dropdown of the phone numbers registered to your account, plus Trunk default. Only numbers your account owns can be shown to the people you call — the network replaces anything else — so the dropdown offers only what will genuinely work.
- Max Concurrent — the ceiling on simultaneous calls.
- Retry Attempts — how many extra tries a busy or unanswered number gets.
- Contacts — paste one contact per line as phone, name (for example +971501234567, Ahmed Hassan), or click Import from Phone Book to append your saved contacts automatically.

Every campaign then appears as a card. The card shows the dialer type, contact count, and caller ID, plus a status badge — *draft* (created but not started), *running*, *paused*, *completed*, or *failed* — alongside live **Dialed**, **Answered**, and **Failed** counts and a progress bar with a percent-complete readout. The controls on the card change with the status: a draft or paused campaign shows the green **Play** button, a running one shows the amber **Pause** button, and any running or paused campaign shows the red square **Stop** button, which ends the run and marks it *completed*. The trash icon deletes the campaign entirely.

Clicking anywhere else on a card opens the detail view — a table of every contact in the campaign with **Name**, **Phone**, **Status**, **Attempts**, **Duration** in seconds, and **Result**, so you can audit each individual outcome.

Step by step

- Click New Campaign.
- Name the campaign, then pick a Dialer Type and a Caller ID.
- Set Max Concurrent and Retry Attempts — the defaults of 1 and 2 are sensible for a first run.
- Paste your list into Contacts or use Import from Phone Book, then click Create.
- Press Play on the new card to start dialing. Watch the counters and progress bar; press Pause if you need a break and Stop when you are done.
- Open the card's detail table to review each contact's attempts, duration, and result, and plan follow-ups.

Tips & troubleshooting

- Campaigns place real calls over your connected calling line — if the trunk shown under PBX → SIP Trunks is not Registered, a started campaign will not reach anyone.
- Phone numbers should include the country code (for example +9715...) so the carrier accepts them.
- If a card seems stuck, check its status badge: a paused campaign never dials until you press Play again.
- Deleting a campaign removes it from the page and from the summary tiles — finish reviewing its results first.

CALL CENTER

Automation Builder

Call Center

The Automation Builder is a visual, no-code canvas where you wire together the routine work around your calls — follow up on a missed call, log a record in your CRM, post an alert to your team — as connected blocks instead of manual steps. You drag, connect, configure, and save; Octavion runs the flow for you whenever its trigger fires.

What you can do here

You land on **Your Automations**, the list of everything you have built. Each entry shows an *Active* or *Inactive* badge with a toggle to pause or resume it, and can be opened for editing or deleted. Two buttons start something new: **New automation** opens a blank canvas, and **Build with AI** lets you describe the flow in plain words — for example, *When a customer misses a call, send a message after 5 minutes* — and drafts the blocks on the canvas for you to review, tweak, and **Save**.

On the canvas, the blocks panel on the left holds three kinds of block:

- Triggers — what starts the flow: Manual Start, Webhook (an incoming signal from another system, such as a new-lead notification), or Schedule, which runs the flow on a timetable — the default runs every day at 9:00 AM, and the hint under the field shows how to change it.

- Actions — what the flow does: Send Email, SMS / WhatsApp, Slack Message, CRM Record (create or find a lead, contact, or task), Google Sheet, HTTP Request, Set Fields, and Wait / Delay for pauses measured in seconds, minutes, or hours.
- Logic — Condition (IF) splits the flow into a true and a false path based on a comparison you define.

Click a block in the panel to place it, then drag from one block's connector to the next to set the order. Selecting any block opens its settings panel on the right, where you fill in the details — recipient, message text, record fields — rename the block, or delete it. Give the automation a name in the toolbar and press **Save**. A confirmation toast tells you the save landed; back in the list, flip the toggle to make it *Active*.

Step by step

- Press New automation (or Build with AI and describe what you want).
- Add one trigger block — every flow starts with exactly one.
- Add action blocks and connect them in the order they should run; insert Wait / Delay where timing matters and Condition (IF) where paths diverge.
- Click each block and complete its settings.
- Name the automation, press Save, then activate it from the list with its toggle.

Tips & troubleshooting

- Save refuses with “Add at least one block first” — the canvas is empty; place a trigger before saving.
- Sending over WhatsApp requires your organization's own account on the official WhatsApp Business Platform (by Meta) to be configured first; until then, use the SMS or email actions instead.
- AI drafts are exactly that — drafts. Review every block's settings before activating; nothing runs until you save and switch the automation to Active.
- Pausing with the toggle is the safe way to take a flow offline while you rework it; deleting is permanent.

CALL CENTER

Call Blocking

Call Center

Call Blocking is your account's block list — the registry of phone numbers you never want ringing your team: persistent spam callers, robocallers, or any specific number you have decided to keep out. The page keeps that list clean, searchable, and exportable so everyone works from the same record.

What you can do here

- Add — opens a window with two fields: Number (required — enter it in full international form, for example +9714...) and an optional Reason so future you remembers why the number was blocked. Press Save to store the entry.
- Search — filters the table live by number, reason, or date as you type.
- Print and CSV — print the current list or download it as a dated spreadsheet file; both respect the active search.
- Trash icon — removes an entry from its row, taking that number off your block list.

The table shows each entry's **Number**, **Reason**, and **Created** date, and — when entries were added by different teammates — an automatic **Created By** column so you can see who blocked what.

Be aware of the note shown at the top of the page: numbers you add are saved to your account, but blocking is not applied to live calls yet. Treat the page as your authoritative block registry — the record your team maintains and consults — rather than an enforcement switch.

Step by step

- Click Add in the top corner.
- Type the number in full international format, starting with the country code.
- Add a short Reason — repeated spam, abusive caller, automated dialer — and click Save.
- To remove a number later, find its row (the search box helps on long lists) and click the trash icon.

Tips & troubleshooting

- Always include the country code. +97141234567 and 041234567 look like different numbers to a list, and inconsistent formats create duplicate entries.
- The Reason field is optional but future-proof — six months from now, nobody remembers why a number was blocked unless it is written down.
- Export the list with CSV before a large cleanup so you can restore entries if you remove the wrong ones.
- Callers with legitimate business who simply reach the wrong team are better served by routing — queues, ring groups, and IVR menus — than by blocking.

CALL CENTER

Call Tracking

Call Center

Call Tracking tells you which marketing source made your phone ring. By assigning a distinct phone number to each ad channel, campaign, or offline placement, every inbound call carries its origin with it — so you can see precisely which sources drive calls and leads, and which only spend your budget.

What you can do here

Four tiles at the top summarize the account: **Tracking Numbers**, **Total Calls Tracked**, **Leads Generated**, and **Conversion Rate**. Below them the page has three tabs.

Tracking Numbers

Click **Add Number** to register a number and tag it with a **Source** — *Google Ads, Facebook, Instagram, Website, Billboard, Referral, or Google Maps* — plus an optional **Campaign** label and a **Medium** (*cpc, social, organic, referral, offline, email, or local*). The table then reports, per number: calls, leads, conversion percentage, and an on/off **Status** toggle. A search box filters by number or source, and the trash icon removes a number.

Dynamic Number Insertion

Dynamic Number Insertion (DNI) swaps the phone number displayed on your website per visitor, so a caller who arrived from an ad is attributed to that ad automatically. The tab illustrates the four-step flow — visitor clicks ad, lands on your site, number is swapped, call is tracked. Click **Add Website** and enter the **Domain**, a **Default Number** (shown when no swap applies), and a **Pool Size** (how many tracking numbers rotate across visitors). Each registered site gets a card with an *Active/Paused* toggle, a delete button, and a small code snippet — press **Copy Snippet** and paste it into your website's pages to switch the swapping on.

Source Attribution

Side-by-side cards aggregate your tracking numbers by source, each showing total calls, total leads, the conversion percentage, and a bar indicating that source's share of all tracked calls — the quickest way to compare channels at a glance.

Step by step

- Decide which channels you want to measure — say, a search-ads campaign and a billboard.
- On Tracking Numbers, click Add Number for each channel and tag it with the right source, campaign, and medium.
- Use each number only in its own channel: put the billboard number on the billboard, the ad number in the ad.
- For your website, open Dynamic Number Insertion, add your domain, and paste the snippet into your site so visitors see a tracked number automatically.
- Return after a few days of traffic and read Source Attribution to see which channels actually generate calls and leads.

Tips & troubleshooting

- Tracking numbers are managed here, separately from the general phone numbers under PBX → Numbers — attribution and website swapping only read the numbers on this page.
- Toggling a number off stops counting new calls against it without deleting its history.
- If website swaps are not appearing, confirm the site's card is Active and that the snippet is present on the pages your ads land on.
- Keep the Campaign field consistent with the campaign names in your ad platforms — your reports will be far easier to line up.

CALL CENTER

Callback Widget

Call Center

The Callback Widget is an embeddable click-to-call button for your websites. Visitors press it, leave their number, and the request lands in your Call Center with the call delivered to the number you chose — so a lead browsing at the edge of a decision never slips away. Unlike the ready-made button on the Lead Generator page, every widget here is fully customizable: its color, text, position, and even the hours it appears.

What you can do here

Three cards at the top summarize everything: **Active Widgets**, **Total Requests**, and **Connected Calls**. The **New Widget** button opens the *Create Callback Widget* form:

- Widget Name and Domain — a label for your team and the site the widget will live on.
- Target Phone Number — where callback calls are delivered.
- Button Color (a color picker), Button Text (default Call Me Back), and Position — bottom-right, bottom-left, top-right, or top-left.
- Working hours only — tick this and set a start and end time to accept requests only during business hours. The times are read on UAE time (Gulf Standard Time); outside the window, the widget tells visitors you are closed and the request is refused.

Press **Create Widget** and the widget appears as a card with a live **Preview** that mirrors exactly what your site will render — the stored color, label, and corner. When a widget is switched off, the preview says so plainly: the embed renders nothing and any submission is rejected. Each card also carries its own counters (**Requests**, **Connected**, and **Success** rate), an on/off toggle, a trash icon to delete it, the embed snippet, and a **Copy Code** button.

Step by step

- Click New Widget, name it, and enter the domain and the target phone number.
- Pick a color that matches your site, adjust the button text and corner, and enable Working hours only if your team is not staffed around the clock.
- Click Create Widget, press Copy Code on the card, and paste the snippet into your website.
- Load your site, confirm the button shows in the right corner, and make a test request to see it counted on the card.

Tips & troubleshooting

- The button is not showing? Check three things: the widget's toggle is on, the snippet is on the live page, and — if working hours are enabled — the current UAE time is inside the window.
- The success rate compares connected calls with total requests; a low rate usually means requests arrive outside staffed hours or the target number is not being answered.

- Run separate widgets per site (or per landing page) so their counters tell you which placement earns its keep.
- Switching a widget off stops it instantly on your site — useful during holidays — while its history and settings stay intact; deleting removes it for good.

CALL CENTER

Caller ID Rules

Call Center

Caller ID Rules is the registry of outbound calling identities for your account: each rule pairs a phone number with a display name, so your organization keeps a documented, agreed answer to the question *which number do we show when we call people?*

What you can do here

- Add — opens a window with two fields: Number (required) and an optional Name describing the identity, such as Sales line or Clinic reception. Press Save to store the rule.
- Search — filters the list by number or name as you type.
- Status filter — when rules carry a status, a dropdown appears so you can view only active or inactive entries.
- Print and CSV — print or download the current list, respecting any search or filter.
- Trash icon — deletes a rule from its row.

The table lists each rule's **Number**, **Name**, and **Status**, with a **Created By** column appearing automatically when several teammates have added rules.

Note the banner on the page: rules saved here are stored to your account but are not applied to outgoing calls yet. Where caller ID is actively selected today is the **Auto-Dialer** — each campaign's **Caller ID** dropdown offers the numbers registered to your account, or the line's default. And a hard rule of the phone network applies everywhere: only numbers your account genuinely owns can be presented to the people you call; anything else is replaced by the carrier.

Step by step

- Click Add.
- Enter the Number in full international format.
- Give it a Name that says what the identity is for, then click Save.
- Repeat for each number your organization presents, so the list documents every calling identity you use.

Tips & troubleshooting

- Keep one rule per number and use the name to record its purpose — it turns the page into a self-explanatory inventory of your calling identities.

- To control what recipients see on a specific outbound campaign right now, set the Caller ID field when creating the campaign in Auto-Dialer.
- If recipients report seeing a different number than expected, the usual cause is presenting a number the account does not own — the network silently substitutes it. Stick to the numbers listed under PBX → Numbers.
- Export with CSV when your carrier or compliance reviewer asks which identities you present.

CALL CENTER

Call History

Call Center

Call History is the complete record of every inbound and outbound call on your line — live performance tiles on top, search and filters, and a details panel uniting each call's recording, transcript, and an automatic AI analysis of every completed call. Supervisors review calls here; agents wrap up, save callers, and send leads to Advanced CRM.

What you can do here

- Stat tiles — Total, Inbound, Outbound, Answered, Missed, Failed out (outbound attempts the network rejected), Avg Duration, Talk Time, and Positive (calls with positive sentiment). The tiles follow your filters.
- Search and Filters — search by number, agent, or queue, or press Filters to narrow by Direction, Status, Sentiment, Agent, Duration, and Has (Recording, Transcript, or both). The panel shows a count of the filters currently active, and a Clear all link resets them in one click; a refresh icon beside Filters reloads the list with the newest calls.
- Print Report — a clean, print-ready summary of the filtered list with totals.
- New Call — opens the built-in phone: type or tap a number; during a call you can hold it, mute your microphone (and unmute to speak again), or transfer it to a typed extension or a colleague from a live teammate list. A speaker toggle switches the call audio to the loudspeaker and back to your headset. While connected, tapping the dial pad sends keypad tones (DTMF) to the other side — for navigating another company's phone menu — and a Tones sent readout shows the digits you pressed.
- The call list — each row shows direction, contact (a saved Phone Book contact appears as a name with the number underneath), agent, queue, status, duration, sentiment, recording and transcript indicators, and the time. When results span multiple pages, a pager under the table shows Page X of Y with First, Previous, Next, and Last buttons.

Inside the call details panel

- Call summary — Direction, Status, From, To, Duration, Agent, Started, and Ended.
- Recording — a player to listen to the call; if there is no transcript yet, press Transcribe & Analyze.
- AI Analysis — automatic for every completed call: within minutes of hang-up, a summary, sentiment, intent, topics, action items, and compliance flags appear on their own — no button

needed.

- Transcript — the full conversation, speaker by speaker.
- AI Quality Score — press Run AI QA to grade the call: an overall score out of 100, per-criterion scores, strengths, and improvements.
- Disposition & Tags — record the outcome from your company's own disposition list (a Reason dropdown appears when the outcome requires one), toggle quick tags, and press Save.
- Contact — Save contact files the caller into your Phone Book, with + More details for company, email, and notes. Send to CRM creates a real lead in Advanced CRM; it is enabled only when your account subscribes to Advanced CRM, and once the lead exists the button reads In CRM ✓ and never creates a duplicate.
- Caller rating — when the caller rated the call, the score appears as a chip.

Step by step

- Open Calls in the Call Center menu.
- Use search or Filters to find the calls you care about, such as missed inbound calls.
- Click a row to open its details.
- Play the Recording, then read the Transcript and AI Analysis.
- Set the Disposition (and Reason if asked), then press Save.
- If the caller is new, press Save contact; if they are a prospect, press Send to CRM.

Tips & troubleshooting

- Missed counts inbound calls that rang unanswered; Failed out counts rejected outbound attempts — staffing versus the line itself.
- If an older call has a recording but no analysis, press Transcribe & Analyze; new completed calls are analyzed by themselves within minutes.
- If Send to CRM is grayed out, hover over it: it says whether the check is still running, the account needs Advanced CRM, or the caller is already a lead.
- Names in the Contact column come from the Phone Book — save a caller once and the name applies everywhere, because numbers match on their last nine digits.

CALL CENTER

AI Coaching Reports

Call Center

Coaching turns an agent's recent calls into a personal development report. Instead of a supervisor assembling feedback by hand, the AI reads the agent's own call activity and produces a rating out of 100, a short summary, and three practical sections: what the agent does well, what to work on, and concrete tips for the next shift. The result is designed to be discussed, printed, signed, and filed — not just glanced at.

What you can do here

The **agent selector** at the top chooses whose coaching you are generating. If you manage the team, you can pick any agent from the dropdown; if you are an individual agent, it is set to you and stays there. The **Generate coaching** button starts the analysis of that agent's recent calls.

When the report arrives, the top card shows the **Performance Rating**: a colored score ring out of 100 with a plain-language verdict — **Excellent** (85 and above), **Good performance** (70–84), **Fair — room to grow** (50–69), or **Needs coaching** (below 50) — followed by a one-paragraph summary. The card is honest about its author: when the assessment was written by the AI it is labeled **AI Performance Rating**; if the AI could not run and the report was assembled from built-in guidance rules instead, the label reads simply **Performance Rating**, so you always know which kind of assessment you are reading.

Three sections follow the rating card. **Strengths** lists what the agent is already doing well, **Focus areas** names the habits or metrics that need attention, and **Actionable tips** gives specific steps the agent can apply on the very next call. Sections with nothing to say are simply omitted rather than shown empty.

The **Print report** button produces a formal coaching document: the score ring and verdict, the summary, each populated section, and signature lines for the **agent**, the **supervisor**, and the **date** — ready for a one-on-one and a personnel file. The printed footer reminds both parties that the assessment is generated from the agent's own recent call activity and should be discussed together before filing.

Step by step

- Open Coaching from the Call Center menu.
- If you manage the team, choose the agent in the agent selector; your own name is marked in the list.
- Press Generate coaching and wait a moment while recent calls are analyzed.
- Read the Performance Rating and summary, then work through Strengths, Focus areas, and Actionable tips.
- Press Print report if you want a signed copy for the coaching session.
- Switch agents and generate again to review the rest of the team.

Tips & troubleshooting

- If the agent has no recent call activity yet, the page tells you there is nothing to coach from — that is a real answer, not an error. Generate again once the agent has taken calls.
- If the agent list will not load or a report fails, the page explains why — a sign-in issue, a permission limit, or a connection problem — and offers a Retry button.
- Coaching pairs naturally with Quality Monitoring: use a scorecard evaluation for a single call, and this page for the pattern across many calls.
- Generate a fresh report before each one-on-one; it always reflects the agent's most recent calls rather than a stored snapshot.

CALL CENTER

AI Compliance & Campaign Review

Call Center

Compliance & Campaign Review is a pre-flight check for your advertising and messaging campaigns. Before you submit a campaign to the official WhatsApp Business Platform (by Meta) or its advertising channels, this page has an AI review your copy, template, audience, budget, and landing page — flagging policy risks, scoring quality and spam risk, and suggesting improvements so you catch problems before the platform's reviewers do. It is an advisor only, as the banner at the top says plainly: it never guarantees approval — the final decision always belongs to the platform.

What you can do here

The collapsible **API Keys** panel at the top holds the credentials the engine runs on, with status pills showing which are configured. Add your own key from any of the three supported AI providers named in the panel — at least one is required before a review can run — and, optionally, your advertising account credentials for the platform: **App ID**, **App Secret**, **System-User Token**, and **Ad Account ID**. Press **Save keys**; saved keys display masked.

The **Campaign content** form describes what you plan to run: **Objective**, **Platform**, **Ad copy (body)**, **Headlines** and **Descriptions** (one per line), **CTA**, **Template category** (Marketing, Utility, or Authentication), **Landing page URL**, your messaging **template** text, **Audience**, **Budget**, and **Schedule**. The ad copy, CTA, and template fields each carry an **AI Fix** button that rewrites the text in place with safer wording.

Run Compliance Review produces the full report: an **Overall** score out of 100, a **Policy risk** level, and an approval confidence clearly labeled an AI estimate. Six meters break the score down — **Quality**, **Spam risk**, **Creative**, **Audience**, **Landing**, and **Template**. Below them come **Blocking issues**, itemized **Policy risks** with severity tags, then **Strengths**, **Weaknesses**, **Required changes**, and **Recommended improvements**, plus suggested headlines, CTAs, wording, audience, budget, scheduling, and creative ideas. A **Keyword intelligence** section highlights risky terms in your copy and offers safer substitutes.

If you filled in a **Landing page URL**, the review also audits it: you get the final URL plus a checklist of findings, each with a pass or warning mark.

The **Generate content** button opens a small drafting studio: choose what to create — headlines, descriptions, ad copy, CTAs, messages, templates, product descriptions, keywords, customer personas, or campaign ideas — pick English, Arabic, Russian, or Spanish, type a one-line brief, and press **Generate** for four ready-to-edit options.

Recent reviews at the bottom keeps your latest reports with score, risk level, summary, and timestamp — watch a campaign improve across drafts.

Step by step

- Open the API Keys panel, add at least one AI provider key, and press Save keys.

- Fill in the Campaign content form — the more fields you complete, the more the review can check.
- Press Run Compliance Review and read the report, starting with blocking issues.
- Apply Required changes, use AI Fix on risky fields, and borrow from the suggestions.
- Review again until the score and risk level satisfy you, then submit the campaign on the platform itself.

Tips & troubleshooting

- If the review says no AI provider is configured, open the API Keys panel and add a key — the review cannot run without one of your own AI keys.
- Choose the Template category honestly; a marketing message filed under Utility is itself a common rejection reason.
- All scores and the approval confidence are AI estimates — treat them as a strong signal, never a promise.

CALL CENTER

Conversion & ROI Tracking

Call Center

The Conversion & ROI page answers the money question: how much is your marketing earning compared with what it costs? It combines your ad spend with the calls and leads your tracking numbers attribute, and turns them into revenue, return on ad spend (ROAS), and cost-per-lead figures you can act on.

What you can do here

Five summary cards head the page: **Total Spend**, **Revenue** (from tracked calls), **ROAS**, **Cost Per Lead**, and **Conversions**. The period buttons — **24h**, **7d**, **30d**, and **90d** — switch the whole page between time ranges.

Two tables carry the detail. **Performance by Source** compares each channel's calls, leads, ad spend, revenue, cost per lead, ROAS, and conversion percentage — ROAS is color-coded so healthy returns (3x and above) read green, break-even territory amber, and losses red. **Ad Spend Breakdown** lists spend per campaign and day with impressions, clicks, click-through rate, and conversions.

The **Setup & Connect** button opens the panel that makes everything run on real data, in four numbered steps:

- Revenue per conversion — the average value, in AED, of one booked lead. This single number is what turns lead counts into the Revenue and ROAS figures.
- Meta Ads — paste a long-lived access token and your ad account ID to sync spend from your Facebook and Instagram campaigns. A Connected badge confirms it took.
- Google Ads — enter your developer token, client ID, client secret, refresh token, and customer ID.

- The tracking snippet — copy the small script and add it to your website so real visitors receive tracking numbers and their calls are attributed automatically.

Press **Save** to store your entries, then **Sync ad spend now** to pull the latest figures — the result of each platform's sync is shown right beside the button.

Step by step

- Click Setup & Connect and enter your average revenue per booked lead.
- Connect the ad platforms you use — both are optional, but ROAS only means something once spend is flowing in.
- Copy the snippet in step four onto your website.
- Press Save, then Sync ad spend now.
- Give it a few days of traffic, then compare sources: a channel with a high cost per lead and low ROAS is where to cut; a green ROAS is where to scale.

Tips & troubleshooting

- Ad-platform syncing requires your own ad accounts and their credentials — Octavion reads the spend you authorize, nothing more.
- An empty Performance by Source table means no attributed calls in the selected period — check that the snippet is embedded and your tracking numbers are active under Call Tracking.
- An empty Ad Spend Breakdown means no spend was recorded — connect a platform and sync, or add figures by hand under Ads Integration → Manual Entry.
- Revisit your revenue-per-conversion figure quarterly; if your average deal size changes, so does every ROAS number on this page.

CALL CENTER

Extensions

Call Center

The **Extensions** screen (Call Center → Extensions) is your live directory of everyone who can talk on the phone: each agent's extension number, their current state, the queue they serve, and their headline performance numbers, all on one page. It is also the place where new extensions are handed out.

What you can do here

- Summary cards — four tiles across the top count Total Agents, With Extension, Online Now, and Offline, so you can judge staffing at a glance before reading a single card.
- Search — the Search by name, extension, or skill box filters the list as you type; it also matches queue names.
- Status filters — chips for All, Available, On Call, Wrap-up, Break, Training, and Offline, each with a live count. Click one to show only agents in that state.

- Refresh — pulls the latest registration and status information; beside it the screen reports how many extensions match your current filter.
- Extension cards — one card per agent showing their name, extension number (a dash when none is assigned yet), queue, and a colored status badge, plus three tiles: Calls today, Avg Handle time, and CSAT (customer satisfaction). Skill tags appear under the metrics when the agent has recorded skills.
- Assign Extension — the button at the top right opens a small dialog: choose the agent, press Assign extension, and the phone system allocates the next free number automatically. The confirmation shows the number that was issued, and the agent's web phone picks it up on its own the next time they open Call Center.

Step by step

- Press Assign Extension at the top right of the screen.
- In the Agent drop-down, pick the person. Only agents who do not yet have an extension are listed — if the list is empty, everyone is already set up.
- Press Assign extension and wait a moment. The dialog shows the newly issued extension number.
- Press Done, then ask the agent to open (or refresh) Call Center; their web phone registers with the new extension automatically.

Tips & troubleshooting

- Assigning an extension requires supervisor or administrator rights — anyone else sees a clear refusal message in the dialog.
- The extension number cannot be chosen by hand: the next free number is always used, which guarantees two people can never collide on the same line.
- The Edit, Configure, and Remove icons that appear when you hover a card are intentionally disabled — extension settings are held by the phone system, not on this page. Use Assign Extension to hand out lines, and contact support if a line needs to be retired.
- If the page is empty, add your people first under Settings → Team; they then appear here ready to receive an extension.
- Offline usually means the agent simply has no Call Center tab open — the web phone lives in the browser tab, so an extension is only registered while a tab is open.

CALL CENTER

Form Tracking

Call Center

Form Tracking captures the leads that arrive through the forms on your website and lists them beside your call activity, giving you one complete picture of where inquiries come from. You register a form once, paste a small code snippet into your site, and every submission then flows into Octavion with

its source attached.

What you can do here

Three tiles summarize the feature: **Tracked Forms**, **Total Submissions**, and **Conversion Rate**. The **Add Form** button opens the *Track a Form* window with three fields:

- Form Name — a friendly label such as Contact Form.
- Domain — the website the form lives on. Submissions are only accepted from this domain and its subdomains; leave it empty to accept any domain.
- CSS Selector — which form element on the page to watch (the default, form, matches every form). Only forms matching the selector are tracked, and password and card fields are never captured.

Press **Track** to save. The page then has two tabs. **Tracked Forms** shows a card per form with its domain, selector, an *Active/Paused* badge and toggle, a submissions counter, the embed snippet, and a **Copy Code** button; the trash icon deletes a form. **Submissions** lists every incoming lead with the form it came from, its **Source**, the submitted **Data**, whether it **Converted**, and the **Date** it arrived.

Step by step

- Click Add Form, name the form, enter your domain, and adjust the CSS selector if you only want specific forms tracked, then press Track.
- On the new card, press Copy Code and paste the snippet into your website — ideally on every page that contains the form.
- Submit a test entry on your site and confirm it appears under the Submissions tab.
- Check back regularly: each row shows exactly what the visitor entered and where they came from, so your team can follow up quickly.

Tips & troubleshooting

- No submissions arriving? Confirm the snippet is actually on the live page, the form's toggle is set to Active, and the domain you registered matches the site the form is on — entries from other domains are rejected by design.
- If your page has several forms and you only want one tracked, give that form a distinctive class or id in your website builder and use it as the CSS selector.
- Sensitive fields are protected automatically: values typed into password or card inputs are never captured.
- Pause a form (toggle off) during site maintenance instead of deleting it — its history and snippet stay intact.

CALL CENTER

Call Scenarios (IVR): The Visual Menu Designer

Call Center

The **Call Scenarios (IVR)** page, in the Call Center navigation, is a visual designer for automated phone menus. You assemble a scenario from simple steps — message, menu, transfer, voicemail — and connect them so a caller is greeted, offered choices, and directed without an agent. Every prompt is typed as plain text and spoken in a natural voice, so there is nothing to record.

What you can do here

- New scenario — creates a scenario and opens it for editing. Existing ones appear in the Scenarios list on the left, with a Live badge on active ones and the number each answers.
- Scenario name, Answers number, and Active — the header of the editor. Name the scenario, type the number it should answer (or leave Any number), and tick Active to switch it on. Press Save to store your work; an Unsaved changes tag appears while edits are pending.
- Delete (the trash button) — deleting takes two clicks: the button turns red and waits five seconds for a confirming click.
- Steps and Add step — the building blocks of the flow. A flag marks the starting step; select any step to edit it, choose Set as start to change where callers begin, or Delete to remove it.

The six step types

- Message — speaks the text you enter in Message (spoken), then continues to the step chosen in Then go to.
- Menu — speaks the Menu prompt (spoken) and waits for a key press. Under Key options, map any digit (1–9, 0, #, or *) to a destination step, add more with Add option, and set On no / invalid input for callers who press nothing or a wrong key.
- Connect — transfers the caller: set Connect to to An agent and pick a teammate, or to External number and type any number.
- Voicemail — plays your message and lets the caller leave a recording.
- Business hours — branches by schedule: tap the Open days chips, set the From and To times, then choose When open → go to and When closed → go to.
- Hang up — ends the call; use it to close every path.

What is live and what is a draft

A notice at the bottom of the editor spells this out. The scenario **name**, the **number it answers**, and the **Active** switch are applied to your phone line when you save. The steps are stored with the scenario, but the key-press routing you design here is not yet what answers real calls — do not rely on a drafted scenario for live traffic until routing has been set up for your account. For greetings, keypad routing, callback, voicemail, and surveys that are live today, use the **Call Flow** page.

Step by step

- Click New scenario, give it a clear name, and enter the number it should answer.
- Add a Message step with your greeting, then a Menu step with your key options.
- Point each key at a Connect, Voicemail, or further Menu step, and set On no / invalid input.
- Add a Business hours step if the flow should differ when you are closed.
- Mark the first step with Set as start, press Save, and check Active when you are ready.

Tips & troubleshooting

- If saving fails, the editor keeps your changes on screen and shows the reason (“Not saved — ...”) so you can retry without losing work.
- If the scenario or agent list cannot load, the page says so and offers a Retry button.
- Give every menu an On no / invalid input destination so hesitant callers are re-prompted, not stranded.

CALL CENTER

Lead Generator

Call Center

The Lead Generator turns website visitors into phone conversations. It gives you a small *Call me back* button for your own site: a visitor taps it, leaves their number, and Octavion automatically dials them and connects the call to your team — before the lead has time to try a competitor.

What you can do here

Four counters run across the top: **Total leads**, **Connected** (requests that turned into a finished call), **Pending** (still being dialed), and **Websites** (how many sites you have registered). A *How it works* panel spells out the three-step flow: add your website, paste the code, get called-back leads.

In the **Your websites** section, the **Add website** button opens an inline form: type your domain (for example *yourwebsite.com*), optionally a **Callback number** the leads should be connected to, and press **Add**. Octavion generates a unique code snippet for that site; press **Copy code** and paste it just before the closing body tag of your website. The trash icon removes a site you no longer use.

The **What your visitors see** panel previews the button exactly as it will appear — a teal, rounded *Call me back* pill in the corner of your page. And at the bottom, the **Incoming leads** table records every callback request with the visitor's **Name**, **Phone**, **Source**, a live **Status** — *requested*, *dialing*, *connected*, *completed*, or *failed* — and **When** it arrived.

Step by step

- Press Add website, enter your domain and (optionally) the callback number, and press Add.
- Press Copy code on the site's card and paste the snippet just before the closing body tag — or hand it to whoever maintains your website.
- Visit your site to confirm the Call me back button appears.
- Submit a test request with your own number: within moments you should receive the call, and the request should appear in Incoming leads with its status advancing from requested toward connected.

Tips & troubleshooting

- Auto-dialing places a real call, so your calling line must be registered — if requests arrive but sit at pending or end failed, check PBX → SIP Trunks.

- The snippet is unique per website; if you run several sites, register each one and use its own code.
- If you want a fully customizable button — its color, text, screen position, and a working-hours window — use the Callback Widget page instead; both feed leads into the Call Center.
- Each lead keeps its source, so you can tell which page or campaign produced the request when you follow up.

CALL CENTER

Overview: Your Customizable Call Center Dashboard

Call Center

Overview is the analytics home for your call center: a professional dashboard of key numbers and charts for any date range you choose. Its centerpiece is a chart board you rearrange by drag and drop — and because the layout is saved to your account rather than the browser, your dashboard follows you to any computer the moment you sign in.

What you can do here

Three tabs shape the view. **Calls** shows the **Calls dynamics** chart — calls per day across your range — followed by the chart board and the metric cards. **Call management** focuses on just the metric cards. **End-to-end analytics** is a table of traffic sources with their **Visits** and **Calls**, connecting web activity to phone activity.

The date button on the right shows the current window. Click it to set a custom **From** and **To** date, or tap the **7d**, **14d**, **30d**, or **90d** presets, then press **Done**. Next to it, **Copy dashboard link** and **Share** copy the page address to your clipboard (a check mark confirms), and **Download** opens the print dialog so you can save the dashboard as a PDF.

The metric cards cover **Average queue time**, **Average call duration**, **Web2calls**, **Lead Generator calls**, and **Calls lost & received** with received in green and lost in red — each labeled with the exact date range it covers.

The chart board starts with **Call Volume**, **Sentiment Distribution**, **Hourly Distribution**, and **Top AI Topics**. Press **+ Add chart** for more: **Answered vs Missed**, **Answer Rate Trend**, **Avg Handle Time Trend**, **Calls by Day of Week**, **Call Duration Breakdown**, and **Top Call Outcomes**, plus an Advanced group with **Traffic Heatmap (Day × Hour)**, **Volume + Answer Rate**, **Cumulative Calls**, **Answer Rate Gauge**, **Conversion Funnel**, **Top Agents by Calls**, and **AI Insights**, where the AI reads your numbers and suggests actions. Every card is yours to shape: drag the ■ handle to reorder, switch the chart style, toggle half or full width, cycle three heights, or remove it entirely.

Step by step

- Open Call Center → Overview and pick your window — tap the date button, choose a preset or custom dates, and press Done.
- Read the Calls dynamics chart for the shape of the period, then the metric cards for queue time, duration, and lost versus received.

- Build your board once: add the charts you actually review, drag them into priority order, and enlarge the critical ones.
- Switch to End-to-end analytics to see which sources drive visits and calls.
- Use Download to produce a PDF for your next management meeting.

Tips & troubleshooting

- Your layout is stored in your account. Sign in on a new computer — or clear your browser entirely — and the board comes back exactly as you left it.
- A chart reading No data to visualize means the selected range genuinely has no calls; widen the range to confirm.
- Sentiment and topic charts fill in as call recordings are analyzed by AI, so they can lag a busy morning slightly.

CALL CENTER

Phone System (PBX)

Call Center

The PBX area is the control panel for the phone system underneath your Call Center — the numbers, extensions, carrier connection, and audio files that make calls physically work. Opening **Call Center** → **PBX** takes you straight to the **Numbers** section; the other four sections — **SIP Lines**, **SIP Trunks**, **Files**, and **Conversation Options** — are one click away in the sidebar.

What you can do here

Numbers

Manage your DID numbers — the virtual phone numbers that route incoming calls into your system. Stat cards count **Total Numbers**, **Active**, **Redirecting**, and **Virtual Assistant** numbers. Click **Add Number**, enter the **Phone Number**, optionally a **Redirect To** destination (an extension or another number), and the type *Virtual Assistant* — a general-purpose number routed into your menus and queues. A search box and type filter narrow the table, and the trash icon deletes a number after confirmation. Two notes on the page matter: numbers saved here become live routes once your SIP trunk is registered and the number is provisioned with the carrier; and numbers meant for marketing attribution or website number-swapping belong in **Call Tracking**, not here.

SIP Lines

A live view of every extension on your phone system and whether a softphone or desk phone is registered to it right now. Stat cards show **Total Lines**, **Registered (online)**, and **Offline**, and the table lists each extension's number, name, type, and a color-coded registration state. Press **Refresh** to re-check, and use the search box to filter the table by extension number or agent name — a live count shows how many lines match. A line reads *Phone online* only while a device is genuinely connected — this is the page to open when someone says *my phone is not ringing*.

SIP Trunks

Your carrier connection — the link between your phone system and the public network — with its live state: *Registered*, *Trying*, *Not loaded*, or *Failed*. Stat cards summarize the total trunks, how many are registered, and whether the phone system itself is online, and a **Refresh** button re-checks the live state. This section is visible to account administrators only, because trunks carry carrier credentials and every billed minute. Check it before going live: inbound and outbound calling works the moment the trunk shows *Registered*.

Files

A private audio library. Press **Record voice** to capture audio with your microphone (and **Stop** to finish), or **Upload audio** to add existing files; each file can then be played, downloaded, or deleted. As the page itself states, files here are stored, played back, and downloaded only — they are not wired into the phone system as greetings, prompts, or hold music from this page.

Conversation Options

The catalog of audio prompt entries for your call flows. Press **Add**, give the option a **Name** (for example *Welcome Greeting Arabic*), and choose its **Type**: *Greeting* (played when a call connects), *Hold Music*, *IVR Prompt*, *Queue Announcement*, *Voicemail*, *After Hours*, or *Transfer*. Stat cards count your options by type, and deleting an option asks for confirmation first.

Step by step

- Open PBX → SIP Trunks (as an administrator) and confirm the trunk state is Registered.
- In Numbers, add your DID numbers and set where each redirects.
- In SIP Lines, verify your agents' phones show Phone online once they sign in.
- Build your prompt catalog under Conversation Options, and keep the matching audio recordings organized in Files.

Tips & troubleshooting

- Almost every calls are not working report resolves in this order: is the trunk registered? → is the line online? → does the number redirect to the right place?
- If SIP Lines shows PBX not configured yet, no extensions are provisioned — that happens during telephony setup once your trunk is live.
- Caller-facing hours, greetings, and voicemail behavior are configured on the Call Flow page; the PBX area supplies the raw material underneath.

CALL CENTER

Quality Monitoring: Evaluations, AI Prefill & the Scorecard Editor

Call Center

Quality Monitoring is where a finished call becomes a structured, defensible evaluation. You grade the call against your account's weighted scorecard, watch the score build in real time, and keep a permanent history you can reopen, print, and coach from. And you rarely start from a blank page:

every completed call also receives an automatic AI analysis — summary, sentiment, and topics — visible in Call History.

What you can do here

The page has two tabs, switched with the toggle at the top right: **New Evaluation** and **History**.

New Evaluation is the audit form. Four header fields sit at the top: **Agent** (a dropdown of your team), **Customer number**, **Call reference**, and **Notes**. Below them, the form shows your scorecard section by section; every question displays its point weight, critical questions carry a red **Fatal** tag, and you answer each with **Yes**, **No**, or **N/A**.

Beside the call reference sits **AI prefill**. Enter the reference of a call on your account and it drafts the evaluation for you: it answers only what the call's evidence can actually prove and honestly marks everything else N/A. When the caller left a keypad rating in the post-call survey, it appears as a badge — for example **Customer rated this call 4/5** — so the customer's own verdict sits beside your audit. You stay the auditor of record: review every drafted answer before saving.

The **Quality Score** panel on the right updates as you answer: the percentage, points earned out of the maximum, and how many questions have been assessed. The verdict is honest about coverage — **Pass** (80% or higher), **Needs improvement**, **Partially assessed** while questions remain unanswered, or a red **Fatal Fail** the moment any fatal question is marked No. **Save Evaluation** records the audit; if a save fails, your answers stay on screen so nothing is lost.

History lists every saved evaluation with its date, agent, customer, score, result, and evaluator. Click any row to open the full evaluation — every answer, fatal misses highlighted, the notes — and use **Print** for a branded copy for a coaching file.

Editing the scorecard

The scorecard is yours to shape in the Scorecard Editor, opened with the **Edit scorecard** button in the Quality page's header (its address is **/cc/quality/scorecard**) and available to administrators — you can also simply ask the AI voice assistant to "open the scorecard". A badge shows whether you are on the **Built-in default** — eight sections, from Opening / Greeting to Call Closure — or your own **Custom card**. Use **+ Section** and **+ Add question**, then set each question's text, its **pts** weight (0–50), and its **Fatal** checkbox, watching the running **Total points**. **Save scorecard** puts your card into effect for all future audits; **Reset to default** returns to the built-in card at any time.

Step by step

- On New Evaluation, pick the Agent, then enter the Customer number and Call reference.
- Optionally press AI prefill to draft answers from the transcript — then review each one.
- Work through every section, marking Yes, No, or N/A per question.
- Check the Quality Score panel: coverage, verdict, and any fatal flag.
- Add Notes if useful, then press Save Evaluation.
- Find the record later on the History tab; click it to review or Print it.

Tips & troubleshooting

- A high percentage with low coverage is not a pass — answer every applicable question so the verdict reflects the whole call.
- AI prefill needs a call reference that matches a call on your account; it drafts from whatever evidence the call has (transcript summary, duration, queue, outcome) and honestly marks everything the evidence cannot prove as N/A for you to review.
- Fatal questions override the math: a single fatal No produces Fatal Fail regardless of the percentage.
- If your account uses a custom scorecard, the form waits until it has loaded — you will never grade against the wrong questions.

CALL CENTER

Queues

Call Center

The **Queues** screen (Call Center → Queues) is where incoming call distribution is built and watched. Each queue is a card that combines its settings, its team in priority order, and its live performance tiles — so staffing and results sit side by side on one page.

What you can do here

- Summary counters — four tiles at the top show total queues, assigned agents, the average SLA across measured queues, and how many queues are active. A dash means the number is not known right now — never that it is zero.
- New Queue — visible to supervisors and administrators, this opens a panel with four fields: Name, Language (Arabic, English, or Both), SLA in seconds (the answer-time target, 20 by default), and ACW in seconds (protected after-call work time, 15 by default). Press Create to save; if anything goes wrong, the form keeps what you typed and tells you the queue was not created.
- Queue cards — each shows the queue name, a language badge, an Active or Inactive badge, and its SLA and ACW settings, followed by six live tiles: Offered, Answered, Abandoned, SLA % (colored green, amber, or red against the target), ASA (average speed of answer), and Abandon %.
- Agent pills — members appear as pills showing name, priority (P1–P20), and language. Drag a pill left or right to reorder priorities — the new order is saved immediately — or press the small × on a pill to take that agent off the queue.
- Add Agent — the row beneath the pills: choose an agent, a priority from P1 to P20, and a language, then press Add. Only agents not already on the queue are offered.
- Delete — the trash icon on a card removes the queue after a confirmation; calls stop routing to it as soon as it is gone.
- Refresh — reloads the queue list and its live statistics on demand.

Step by step

- Press New Queue, enter a clear name such as Support, choose the language, and set the SLA and ACW targets in seconds.
- Press Create — the new queue appears as a card in the list.
- In the card's Add Agent row, pick each team member, give them a priority and a language, and press Add.
- Drag the pills until the order matches who should be offered calls first.
- Watch the six tiles as calls arrive to see whether the queue is hitting its SLA target.

Tips & troubleshooting

- The lower the P number, the earlier the agent is offered a waiting call — priority order is the distribution logic, so keep your strongest first responders at P1.
- If the queue list, the statistics, or the agent roster cannot be loaded, the page says so plainly and offers Retry — an outage is never shown as “you have no queues.”
- Creating, staffing, reordering, and deleting all require supervisor or administrator rights; agents can view the board but not change it.
- SLA % shows a dash until the queue has actually been offered calls — a brand-new queue is not failing its target, it simply has nothing measured yet.

CALL CENTER

Call Recordings

Call Center

The **Recordings** screen (Call Center → Recordings) is the library of your captured calls. Every recording can be played inline, summarized by AI, transcribed speaker by speaker, and acted on — flagged for review, downloaded, shared with a colleague, saved to your Phone Book, or turned into a CRM lead — without leaving the page.

What you can do here

- Summary cards — five tiles count Total Recordings, Total Duration, AI Transcribed, Positive Calls, and Negative Calls.
- Search and filter — the Search by caller, agent, queue or keyword box also matches words inside the AI summaries, so you can find a call by what was discussed. The All Sentiments drop-down narrows the list to Very Positive, Positive, Neutral, Negative, or Very Negative calls.
- Recording rows — each row shows a round play button, the caller and the agent who took the call, the queue, the duration, and the date and time. A Flagged for Review badge appears right on the collapsed row so reviewers spot marked calls without opening each one; a sentiment badge and tags round out the row. Press play to listen with a live progress bar; click the row to expand it.
- AI Summary — the expanded panel opens with a short machine-written summary of the conversation.
- Voice-to-Text — generates the full transcript, labeled by speaker with timestamps.

- Download — saves the audio file to your computer.
- Share — copies a link to the recording so a colleague with access can listen; the button briefly shows Link copied.
- Flag for Review — toggles the review marker on or off; the flag is saved, so it is still there tomorrow.
- Save to contacts — opens a small dialog to name the caller. From then on, every call from that number shows the name instead of digits.
- Send to CRM — creates a lead in Advanced CRM from the caller. The button is disabled with an explanation when Advanced CRM is not part of your subscription, and shows In CRM once the caller is already a lead.
- Delete — permanent, and deliberately a two-step action: press Delete, then Click again to delete within a few seconds. Only administrators and supervisors can delete recordings.

Step by step

- Search for the caller's number, the agent, or a keyword from the conversation.
- Press play for a quick listen, or click the row and read the AI Summary first.
- If you need every word, press Voice-to-Text and read the speaker-by-speaker transcript.
- Act on the call: Flag for Review, Save to contacts, Send to CRM, Download, or Share.

Tips & troubleshooting

- Recordings appear here automatically as calls are captured — there is nothing to upload.
- Deletion cannot be undone. If a call might matter for a dispute, flag it instead of deleting anything around it.
- If Voice-to-Text reports the transcription service is unavailable, ask your administrator to check the speech-to-text setup under the Call Center settings.
- The expanded panel's metadata grid (Caller, Agent, Queue, Sentiment) is handy when you export or reference a call in a report.

CALL CENTER

Reports: Performance Dashboards and Data Export

Call Center

Reports turns your call activity into readable dashboards and downloadable files. One screen covers call volume, agent performance, dispositions, queues, missed calls, sentiment, peak hours, and campaigns — every figure computed from live call records for the time range you pick, and every table exportable as CSV or a printable PDF.

What you can do here

Pick the window first: **Today**, **7 Days**, **14 Days**, **30 Days**, **90 Days**, or **Custom** with a start date up to a year back. Custom ranges run from your chosen start date up to now — an earlier end date is not

available, and the screen says so plainly. **Refresh** reloads the latest numbers. The **Export** menu offers **Export as CSV**, which downloads the table of whichever report tab is active, and **Print / PDF**, which produces a clean landscape report with the report name, range, and generation time in its header.

Six KPI cards summarize the window: **Total Calls**, **Answered**, and **Missed** — each clicks through to the matching call list — plus **SLA**, the share answered within your target seconds, **Avg Handle**, and **Avg Wait**. Missed is honest by design: it counts only real unanswered inbound calls, never outbound attempts the other party declined.

Below sits a customizable chart board. On by default: **Daily Call Volume**, **Agent Call Volume**, **Queue Performance Overview**, **Missed Calls Trend**, **Sentiment Distribution**, **Top Call Topics**, **Calls by Hour of Day**, and the **Weekly Heatmap** of day-by-hour traffic. + **Add chart** offers **Calls by Disposition** and **Campaign Performance** (open their tabs once so the data loads) plus advanced cards: **Answer Rate Trend**, **Cumulative Calls**, **Queue SLA %**, and **Agent Avg Sentiment**. The **Agent Leaderboard** — calls, average handle time, and average sentiment per agent — rides along as a draggable card. Drag the ■ handle to reorder, switch styles, resize, or remove; your arrangement is saved to your account.

Each report tab keeps a detailed table: **Call Summary** day by day; **Agent Performance**, whose export is the full per-agent CSV; **Disposition**, with a clickable tile per outcome and a per-agent breakdown; **Queue Statistics**; **Missed Calls**; **Sentiment Report**, showing the average score from -1 to +1 and counts across five sentiment levels; **Peak Hours**; and **Campaign Report**.

Step by step

- Open Call Center → Reports and choose a time range.
- Read the six KPI cards for the headline, then scan the board — the Weekly Heatmap is the fastest way to spot staffing gaps.
- Click the tab you need, for example Missed Calls, and review its table.
- With that tab active, open Export and choose Export as CSV for a spreadsheet or Print / PDF for a shareable copy.

Tips & troubleshooting

- Export follows the active tab — switch tabs before exporting to change what you download.
- Disposition tiles click through to the exact calls behind each number: the quickest route from a statistic to the conversations that caused it.
- Sentiment figures cover only AI-analyzed calls, so they can trail total volume.

CALL CENTER

Ring Groups

Call Center

The **Ring Groups** screen (Call Center → Ring Groups) lets you group several extensions under one name — a sales team, a back office — and choose how calls would be shared among them: everyone at once, one by one, in rotation, or at random. One important thing to know up front, and the page states it in a notice at the top: **ring groups are saved to your account but are not applied to live call routing yet**. Treat this screen as where you define and keep your group plans; to route live calls today, use **Queues** and **Call Flow**.

What you can do here

- Strategy reference cards — four cards at the top explain the distribution options: Ring All (all extensions ring at the same time), Sequential (ring one by one in order), Round Robin (rotate through extensions evenly), and Random (ring a random extension).
- New Group — the button at the top right (or Create Ring Group when the list is empty) opens the setup form with five fields: Group Name (for example Sales Team), Extensions as a comma-separated list such as 101, 102, 103, Strategy (one of the four above), Ring Time in seconds (how long the group keeps ringing; 30 by default), and an optional Description. Press Create to save.
- Group cards — each saved group shows its name and description, a Strategy chip, the Ring Time, and a chip for every extension in the group.
- Edit — the settings gear on a card opens an inline editor with the same fields — Group Name, Ring Time (seconds), Extensions (comma-separated), Strategy, and Description. Press Save Changes to keep your edits or Cancel to discard them.
- Delete — the trash icon removes a group. Note that deletion happens immediately, with no confirmation step, so check you have the right card before clicking.

Step by step

- Press New Group at the top right.
- Name the group after the team it represents, such as Sales Team.
- Type the member extensions separated by commas — for example 101, 102, 103. You can find each agent's extension number on the Extensions screen.
- Pick a strategy: Ring All suits small teams where the fastest hand wins; Sequential suits an ordered escalation; Round Robin spreads calls evenly; Random avoids any fixed order.
- Set the Ring Time, add a description if it helps your colleagues, and press Create.

Tips & troubleshooting

- Because ring groups are not yet applied to live routing, defining one here does not change what callers experience. For live distribution — waiting lines, priorities, and measured service levels — build a queue on Call Center → Queues and point your Call Flow at it.
- Extensions are entered as plain numbers; a typo simply creates a member that never rings, so double-check the list against the Extensions screen.
- Ring groups and queues answer different questions: a ring group is “which phones ring together,” while a queue is “who waits in line for whom, in what order, and how well are we answering.”

CALL CENTER

Script Compliance: Playbook Adherence Scoring

Call Center

Script Compliance answers a question every call center manager asks: are agents actually following the playbook? You build script templates that capture your approved call flow — the sections, the steps, the phrases that must be said, and the phrases that must never be said — and then have the AI grade real call transcripts against them. The result is a compliance percentage per call, with the exact phrases that were matched, missed, or violated, so a coaching conversation can point at evidence instead of impressions.

What you can do here

Two buttons sit at the top right. **New Script** opens the **Create Script Template** window: give the script a **Script Name**, pick a **Category** (sales, support, onboarding, retention, or general), then type the **Sections** — leave a blank line between sections, and make the first line of each block the section title with its steps on the lines below. Add your **Required Phrases** and **Forbidden Phrases**, one per line, and press **Create**. **Score a Call** opens the grading window; it stays disabled until you have at least one script.

Four cards across the top keep the running totals: **Script Templates**, **Calls Analyzed**, **Avg Compliance** (green at 80% and above, amber below), and **Violations**, the total count of forbidden-phrase hits across all scored calls.

The **Scripts** tab lists every template as a card showing its name, category, section count, and number of required phrases. The **eye icon** expands the card to show the full script — every section with its steps, the required phrases as green chips, and the forbidden phrases as red chips. The **trash icon** deletes the template.

In the **Score a Call** window you choose one of your **Scripts** and a **Call** from your recent calls — each listed with its caller, agent, and time — then press **Analyze Compliance**. The AI reads the call's real transcript, checks it against your sections and phrase lists, and files the result. The call must already have a transcript; if scoring cannot proceed, the reason is shown in the window.

The **Compliance History** tab is the permanent record: one row per scored call with the **Agent**, the overall **Score** (green at 80% and above, amber from 60%, red below), and the counts of **Matched**, **Missed**, and violated phrases, with the date and time of scoring.

Step by step

- Press **New Script** and enter the name, category, sections, and phrase lists, then press **Create**.
- Review the script with the eye icon to confirm the sections and phrases read the way agents are trained.
- Press **Score a Call**, choose the script and a call that has a transcript, and press **Analyze Compliance**.

- Read the result in Compliance History — the score plus matched, missed, and violated phrase counts.
- Score more calls over time and watch Avg Compliance and Violations on the top cards.

Tips & troubleshooting

- Keep required phrases short and distinctive — "recorded for quality" is easier to detect reliably in a transcript than a full scripted sentence.
- If Score a Call is grayed out, create a script first; if the call list is empty, no recent calls are available to score yet.
- Scoring needs a transcript, so very recent calls may not be gradable immediately — try again shortly after the call ends.
- Deleting a script is immediate and has no confirmation step, and past scores remain in Compliance History.

CALL CENTER

Call Center Settings

Call Center

Call Center Settings is the hub that gathers every configuration area of your call center into one grid of cards. Instead of hunting through menus, you open this page, tap the card you need, and land directly on the right screen — from business hours and voice menus to agent extensions and recordings.

What you can do here

Each card names its area and summarizes what it controls:

- General — business hours, timezone, and greeting messages for your telephony.
- Ring Groups — ring strategies and extension groups: which phones ring together, and in what pattern, when a call arrives.
- IVR / Scenarios — interactive voice response menus and call flows: the press 1 for sales trees your callers navigate.
- Queues — call queues, hold music, and timeout actions for callers waiting for an agent.
- Extensions — SIP extensions and agent registration: the internal numbers your agents' phones sign in to.
- Call Blocking — your registry of blocked numbers and spam callers.
- Caller ID Rules — your registry of outbound caller identities.
- Transcription — speech-to-text settings for turning calls into searchable text.
- Tags — the labels used to categorize calls and records.
- Dispositions — the after-call outcome vocabulary agents pick from when wrapping up a call.
- Recordings — browse, play, and transcribe your recorded calls.

- Integrations — connected accounts and cloud storage, such as Google Drive.

Step by step

- Open Call Center → Settings.
- Tap the card for the area you want; each opens its own dedicated page with its own controls.
- Make your changes there, then return to the grid for the next area — the hub itself stores nothing, so there is no save step on this screen.

Tips & troubleshooting

- Setting up a new call center? A practical order: General (hours and timezone) → Extensions (register your agents) → Queues and Ring Groups (how calls are distributed) → IVR / Scenarios (the menu callers hear) → Dispositions and Tags (your team's vocabulary).
- What you can change on the destination pages follows your role — some areas, such as carrier settings, are reserved for account administrators, so a card may open in read-only form for agents.
- If you cannot find a phone-system item here, check the PBX section of the sidebar — phone numbers, SIP lines, trunks, and audio files live there.

CALL CENTER

Speech Analytics: Sentiment, Topics & Agent Ranking

Call Center

Speech Analytics turns your call transcripts into numbers you can act on. Every completed call that has been analyzed contributes its sentiment, its topics, and its agent to this dashboard, so you can see at a glance how conversations are actually going: are customers leaving calls happier than they arrived, what are they calling about, and which agents consistently produce the most positive conversations. The page is read-only — it reports what the automatic AI analysis of your calls has found, and there is nothing to configure here.

What you can do here

The **time range buttons** at the top right — **7d**, **30d**, and **90d** — set the reporting window for everything on the page.

Four summary cards give you the headline numbers. **Calls Analyzed** counts the calls in the window that have an analysis. **Avg Sentiment** is the average sentiment score across those calls, shown to two decimals — above zero the conversations lean positive, below zero they lean negative. **Positive Rate** is the share of analyzed calls rated positive or very positive. **Topics Detected** counts the distinct conversation topics found. When no calls have been analyzed yet, the cards show a dash rather than a misleading zero, and a notice explains that results appear once analysis has run.

The **Sentiment Distribution** chart breaks the analyzed calls into a ring of sentiment categories with a percentage label on each slice, so you can see the mix of positive, neutral, and negative conversations rather than just the average. The **Top Conversation Topics** chart ranks up to ten topics by how many calls mentioned them — an immediate picture of what your customers are contacting you about, and a useful early-warning signal when a new topic suddenly climbs.

The **Agent Sentiment Ranking** lists every agent with analyzed calls, ordered best to worst. Each entry shows the agent's rank badge, name, number of analyzed calls, and average sentiment score — green when it is zero or above, red when negative, and a dash when that agent has no scored calls yet.

Step by step

- Open Speech Analytics from the Call Center menu.
- Choose your window with 7d, 30d, or 90d.
- Scan the four summary cards for the overall picture.
- Check Sentiment Distribution for the mix, then Top Conversation Topics for what is driving calls.
- Review the Agent Sentiment Ranking and note who is at each end of the list.
- Follow up in Quality Monitoring or Coaching for any agent whose conversations are trending negative.

Tips & troubleshooting

- A dash means "not analyzed yet," not "zero." If the whole page shows dashes, no calls in the selected window have an analysis yet — widen the window or check back after more calls complete.
- Compare 7d against 90d: the short window shows what changed this week, the long one whether it is a trend.
- Sentiment ranks conversations, not people — an agent handling your hardest queue will naturally score lower. Read the ranking together with call volume before drawing conclusions.
- Topic counts are per call, so one long call about billing counts once — a topic near the top of the chart really is widespread.

CALL CENTER

Supervisor: Live Monitoring, Call Coaching, and Team Control

Call Center

The Supervisor screen is your command center for the live call center floor. It shows every active call and every agent in real time, lets you listen in, coach, or step into a conversation the moment it needs help, and gives you full control over your team's availability. Everything on the board refreshes automatically every 15 seconds.

What you can do here

The screen has two tabs. **Online monitoring** is the live floor view for supervisors and administrators; **Agents** is the status board every team member can use. If your role does not include monitoring, that tab is simply not shown.

On the monitoring tab, the *In calls flow* tiles count **Success calls**, **Lost calls**, **Missed**, and **Average Waiting Time**, plus calls currently **When logging in**, **Waiting for answer**, **Talking**, and **Waiting for transfer**. The success, lost, and missed tiles are clickable and open the matching call list. The **Employees** row summarizes who is **Free**, **Talking**, **On an inbound**, and **On an outbound** call. A dash means a number has not loaded yet — it is never a hidden zero.

The **Active Calls** section lists every conversation in progress with caller, destination, extension, direction, live state, and a running timer, plus a **Refresh** link. Each call carries four controls: **Listen** monitors silently — neither party hears you; **Whisper** lets you coach your agent while the caller hears nothing; **Barge** joins the call as a three-way conversation; and **Takeover** moves the call to you entirely. Below, the **Find an employee** search filters a table showing each person's **Status**, when the **Status changed**, and their **Line**.

On the Agents tab, **My Status** lets you set yourself to **Available**, **Break**, **Lunch**, **Prayer**, **Meeting**, **Outbound**, or **Offline**, and shows your own inbound and outbound counts. A small *Phone offline* note appears beside a status when that person's phone is not registered — presence and phone connection are tracked separately. The **Team** roster lists every agent with role, extension, status, and call counts; the **AI Review** button on any agent generates an AI-written performance review. Managers also get a **Set status** dropdown to correct a teammate's presence and a **Log out** button that signs the agent out of the platform everywhere — it asks for confirmation first.

Step by step

- Open Call Center → Supervisor and stay on the monitoring tab.
- Find the conversation under Active Calls.
- Click Listen to hear the call silently. If your account has no extension on file, an Enter Your Extension prompt appears — type your extension number, for example 1001, and press Confirm. If you already have one, you connect immediately.
- Need to guide the agent? Click Whisper and speak — only the agent hears you.
- To speak with the customer directly, click Barge; to handle the call yourself, click Takeover.
- A confirmation message appears in the corner as each command activates.

Tips & troubleshooting

- If Active Calls shows a message instead of calls, read it — an empty floor and a subscription that does not include live call control look different on purpose.
- Use Set status to fix a forgotten break; reserve Log out for real sign-outs, since it revokes the agent's session everywhere.
- A Phone offline marker beside an available agent usually means their device or phone tab is closed — calls cannot reach them until it reconnects.

CALL CENTER

Tags

Call Center

Tags are the labels your Call Center uses to categorize and organize records — a shared vocabulary like *VIP*, *Complaint*, *Arabic speaker*, or *June campaign*. This page is where that vocabulary is created and maintained, so the whole team labels things the same way and filtering stays meaningful instead of drowning in near-duplicates.

What you can do here

- Add — opens a window with a single required Name field; click Save and the tag joins the list immediately.
- Search — filters the table live as you type; on a long list this is the fastest way to check whether a tag already exists before creating a near-duplicate.
- Print and CSV — print the tag list or download it as a dated spreadsheet file, useful when reviewing your labeling conventions with the team.
- Trash icon — deletes a tag from its row.

The table shows each tag's **Name** and **Created** date, and adds a **Created By** column automatically when tags were made by different teammates — handy for spotting who introduced which label. An empty list simply reads *No records yet* until you add your first tag.

Step by step

- Before adding, type the idea into Search to make sure a similar tag does not already exist.
- Click Add, enter a short, specific Name, and click Save.
- Repeat until your working vocabulary is covered — most teams need ten to twenty well-chosen tags, not a hundred.
- Once a quarter, open the page, retire stale labels with the trash icon, and export the final list with CSV so the team has the current vocabulary in hand.

Tips & troubleshooting

- Agree on a naming convention early — singular nouns, one language, no abbreviations only one person understands. Complaint and complaints will otherwise live forever as two separate tags.
- Fewer, sharper tags beat many vague ones: a tag that applies to everything filters nothing.
- Do a quick team check before deleting labels others may rely on in their day-to-day filtering.
- Tags complement dispositions rather than replace them: a disposition records the outcome of a call, while a tag describes the caller or the topic. Keep the two vocabularies distinct and both stay useful.

CALL CENTER

Transcription Rules

Call Center

Transcription Rules is your team's shared register of named rules relating to call transcription. Call Center produces written transcripts of your calls automatically, and those transcripts feed features across the product — Speech Analytics, Script Compliance scoring, and the AI prefill in Quality Monitoring all read from them. This page gives you one documented place to record the transcription rules your operation has agreed on, so they live in your account rather than in someone's head. One thing to know up front, and the page states it plainly in the amber notice at the top: rules you add here are saved to your account, but they are not applied to the automatic call transcription. Treat this screen as a reference registry of your rules today.

What you can do here

The **Add** button at the top right opens the new-rule window. It has a single required field, **Name** — give the rule a clear, descriptive name your teammates will recognize — then press **Save** to add it to the list or **Cancel** to discard it. If the save is rejected, the reason appears in red inside the window so you can correct it and try again.

The table lists every rule on your account with its **Name**, **Status**, and **Created** date and time; when rules record who added them, a **Created by** column appears as well. Empty values show as a dash, and a friendly empty state appears when the account has no rules yet.

The **search box** above the table filters the list as you type, matching against the rule's visible columns. Next to it, a **Status** filter dropdown appears once your rules carry status values; its options are built from the values actually present in your list, and choosing one narrows the table to matching rules. Search and filter combine, so you can search within a filtered view.

The **Print** button sends the currently visible list to your printer, and the **CSV** button downloads the same list as a spreadsheet file named after the page and today's date — useful for sharing the rule set outside the app or attaching it to an internal procedure document. Both act on the filtered view, so what you see is exactly what you get.

Finally, the **trash icon** at the end of each row deletes that rule from your account.

Step by step

- Open Transcription Rules from the Call Center menu.
- Press Add, enter a descriptive Name, and press Save.
- Confirm the new rule appears in the table with its created date.
- Use the search box or Status filter to find rules later as the list grows.
- Use CSV or Print whenever you need to share or archive the current rule set.

Tips & troubleshooting

- Deleting is immediate — the trash icon removes the rule without a confirmation step, so click it deliberately.

- The CSV button is disabled while the visible list is empty; clear your search or filter if the export appears grayed out.
- The Status filter only appears once at least one rule carries a status value — its absence on a fresh account is normal.
- Because rules are not applied to transcription, use the name to capture the full intent — for example the vocabulary, language, or redaction convention the rule describes — so the register stays useful on its own.

CALL CENTER

Voicemail

Call Center

The **Voicemail** screen (Call Center → Voicemail) is your team's shared inbox for the calls nobody could take. When a caller reaches voicemail — after hours, on overflow, or when everyone is busy — the message lands here with the caller's number, the extension it was left for, and its audio, so the team can catch up and call people back without anything slipping through.

What you can do here

- Summary cards — three tiles at the top count Total Messages, Unread, and how many arrived This Week, so a quick glance tells you whether the inbox needs attention.
- Message rows — each message shows the caller's number, an arrow to the extension it was left for, the message length, and the date and time it arrived. Unread messages carry a dot and a highlighted border so they stand out until someone opens them.
- Play — the round button on the left plays the recording; press it again to stop. When a message has no audio attached, the button is dimmed and explains why when you hover it.
- Transcript — messages that have been transcribed show a small chevron. Click anywhere on the row to expand the Transcript and read what the caller said at a glance — opening a message also marks it as read automatically.
- Delete — the trash icon on the right removes a message. Deletion is immediate, with no confirmation step, so listen or read first.
- Voicemail-to-email — when this option is enabled in Call Center → Call Flow, every new message is also emailed to you with the audio attached, so voicemail reaches you even when no one is signed in to Octavion.

Step by step

- Open Call Center → Voicemail and check the Unread tile.
- Start with the highlighted rows. Click a message to expand its transcript, or press play to hear the caller's own words and tone.
- Note the extension the message was left for — that tells you which teammate or line the caller was trying to reach.

- Call the person back from the Calls screen's New Call window, then wrap up the callback with a disposition as usual.
- Once a message is handled, remove it with the trash icon to keep the inbox tidy.

Tips & troubleshooting

- Whether callers are offered voicemail — and when — is decided by your Call Flow: its after-hours and no-answer branches are where voicemail is switched on and pointed at your team.
- If the inbox stays empty, that can be good news (every call answered) or a routing gap — confirm in Call Flow that a voicemail branch exists for the times nobody can pick up.
- Turn on voicemail-to-email in Call Flow if messages must never wait for someone to open this screen — each message arrives in your mailbox as an audio attachment within moments.
- Deleting here removes the message for the whole team, not just for you, so agree on who clears the inbox.

CALL CENTER

Wallboard: The Real-Time Big-Screen Display

Call Center

The Wallboard is a real-time display built for a big screen: put it on a TV or shared monitor and the whole team can watch queues, agent status, and today's key numbers change live. It refreshes itself every 15 seconds, so once it is open there is nothing to click.

What you can do here

Five large tiles run across the top. **Calls** counts every call in the last 24 hours. **Answered** shows answered calls with the answer rate underneath. **Waiting** is the number of callers in queue at this moment. The satisfaction tile shows **CSAT** as a score out of five with the number of surveys behind it; until a customer has actually completed a survey, it switches honestly to **Sentiment** — the AI-measured average on a scale from -1 to +1 — rather than dressing an estimate up as CSAT. **SLA** shows the percentage of calls answered within your target seconds.

Below the tiles sits a card board you can arrange yourself. **Queue Status** lists each queue with its assigned agents and a waiting count that highlights the moment anyone is on hold, plus your five busiest agents with call counts and average handle time. **Agents Online** shows who is signed in, with a glowing dot per person — on a call, available, or busy — beside their status and extension. **Last 24 Hours** summarizes **Avg Wait**, **Avg Handle**, **Missed Calls** with their percentage, **Answer Rate**, and **Active Calls**.

Press **+ Add chart** to add optional cards: **Hourly Traffic (Today)** splitting inbound and outbound by hour, **Sentiment Distribution**, **Top AI Topics** showing what customers called about today, and **Calls per Agent**. Every card can be rearranged by dragging its ■ handle, switched between chart styles (bar, area, line, donut, and more), resized between half and full width and three heights, or removed. Your layout is saved to your account, so it follows you to any browser or computer after sign-in — clearing the browser does not lose it.

Step by step

- Open Call Center → Wallboard on the machine driving your shared screen.
- Arrange the board once: drag the ■ handle to reorder cards, enlarge the ones that matter most, and remove the rest.
- Add any extra charts your team watches with + Add chart.
- Leave it open — tiles, queues, and agent dots update on their own every 15 seconds.

Tips & troubleshooting

- Missed Calls counts only genuinely unanswered inbound calls — outbound attempts the other side declined are never inflated into it.
- If the satisfaction tile shows Sentiment instead of CSAT, that is by design: no customer surveys have been recorded yet.
- Because the layout is stored per account, the wallboard machine can keep its own arrangement while your personal sign-in keeps another.

10

MODULE 10

HR & Payroll

8 topics in this module:

- Managing Employee Records
- Departments and Designations
- Attendance and Check-in
- Leave Management
- Shifts and Rosters
- Payroll: Salary Structure, Salary Slips, and...
- Expense Claims and Reimbursements
- Employee Onboarding and Exit

Managing Employee Records

Updated 2026-07-17

The employee record is the foundation of everything in the HR & Payroll module. Every attendance entry, leave request, salary slip, and expense claim links back to it, so keeping this data accurate is your first priority.

Creating a new employee

- Open the HR module and go to Employees, then click New.
- Enter the person's full legal name, gender, and date of birth.
- Set the Date of Joining — this drives leave accrual, probation tracking, and payroll eligibility.
- Assign the Company, Department, and Designation, and choose the Reports To manager to build your reporting hierarchy.
- Save the record. Octavion generates a unique Employee ID automatically.

Key information sections

- Personal details: contact number, personal email, address, marital status, and emergency contact.
- Company details: employment type (full-time, part-time, contract), grade, and branch location.
- Salary: the assigned salary structure and cost to company. This section feeds every payroll run.
- Attendance & leave: the holiday list, default shift, and leave policy that apply to this person.
- Approvers: the designated leave approver, expense approver, and shift request approver.

Employment status

Each employee carries a **Status** of *Active*, *On Leave*, *Suspended*, or *Left*. Only active employees appear in payroll runs and attendance reports. When someone departs, set the status to *Left* and record the **Relieving Date** rather than deleting the record — this preserves history for audits and final settlement.

Uploading documents

Attach identity documents, contracts, visa and work-permit copies, and qualification certificates directly to the record. Set expiry dates on documents such as passports and permits so the platform can remind you before they lapse.

Best practices

- Complete the reporting hierarchy for every employee — it powers approval routing across leave, expenses, and shifts.
- Keep bank account details current under the salary section so payroll disbursement never stalls.
- Use the Employee Grade to standardise salary bands and leave entitlements across similar roles.
- Run the Employee directory report periodically to catch missing managers, blank departments, or incomplete profiles.

A well-maintained employee record removes friction from every downstream HR process, so invest the time up front when you onboard each person.

HR & PAYROLL

Departments and Designations

Updated 2026-07-17

Departments and designations give your organisation its shape. Departments define *where* a person sits in the structure, while designations describe *what* they do. Together they drive reporting, approval routing, and workforce analytics.

Setting up departments

- Go to HR > Departments and click New.
- Enter the department name, such as Sales, Finance, or Operations.
- Choose a Parent Department to nest it under a larger division. Octavion supports a full tree, so you can model Regional Sales under Sales under Commercial.
- Assign default Leave Approvers and Expense Approvers for the department. New employees added here inherit these approvers automatically.
- Save. The department now appears in the organisation tree view.

Using the tree view

The tree view renders your whole structure visually. Expand and collapse branches to review how teams roll up, and drag employees or sub-departments to reorganise after a restructure. This view is the fastest way to spot orphaned teams or missing managers.

Creating designations

A designation is a job title — Accountant, Field Technician, Regional Manager. To add one, open **HR > Designations**, click **New**, and enter the title with an optional description of responsibilities and required skills.

Keep designations generic and reusable. Rather than creating *Senior Accountant – Dubai Branch*, create *Senior Accountant* and let the department and branch fields on the employee record capture the location. This keeps your title list clean and your reports meaningful.

Why the distinction matters

- Approval routing: department-level approvers determine who signs off leave and expenses when an individual approver is not set.
- Payroll grouping: you can run payroll and cost reports by department to see labour spend per team.
- Headcount planning: designation-based reports reveal how many people hold each role and where gaps exist.
- Access control: combined with roles, departments help scope who can view whose data.

Maintenance tips

- Review the tree after every reorganisation so approvals continue to route correctly.
- Avoid deleting a department that has historical records — deactivate it instead to preserve past payroll and attendance data.
- Standardise naming conventions before you scale, so titles stay consistent across branches.

A clean department and designation structure is quiet infrastructure: you rarely think about it, but every approval and report depends on it being right.

HR & PAYROLL

Attendance and Check-in

Updated 2026-07-17

Attendance tracking in Octavion records who was present, absent, on leave, or working a half day for each calendar date. Accurate attendance feeds directly into payroll, so it is worth setting up deliberately.

How attendance is captured

You can record attendance three ways, and most organisations combine them:

- Employee check-in: staff mark their arrival and departure from the self-service portal or mobile app. Each check-in stamps a time and, where enabled, a location.
- Bulk marking: HR marks attendance for a whole team or date range in one action — useful for site teams or after a public holiday.
- Automatic from shifts: when employees are assigned shifts, Octavion converts their check-in and check-out logs into attendance records against the correct shift.

Recording check-ins

- The employee opens the portal and taps Check In at the start of the working day.
- At the end of the day they tap Check Out. The platform calculates total working hours from the two stamps.
- If geolocation is enabled, the recorded location is attached so you can confirm on-site presence.

Marking attendance manually

- Go to HR > Attendance and click New, or use Mark Attendance for bulk entry.
- Select the employee, the date, and a status of Present, Absent, Half Day, On Leave, or Work From Home.
- Link the relevant shift if applicable, then save.

Attendance and payroll

During a payroll run, the platform counts payable days by combining present days, approved leave, and holidays, then deducts unpaid absences. Configure whether half days pay 50 percent and whether weekly offs and holidays are automatically treated as present. Getting these rules right

ensures salary slips reconcile with attendance without manual correction.

Reports and monitoring

- The Monthly Attendance Sheet gives a calendar-style grid of every employee's daily status.
- The Employee Checkin log lists raw timestamps for auditing late arrivals and early departures.
- Absence and late-arrival summaries help managers address patterns early.

Best practices

- Assign a holiday list to every employee so weekends and public holidays are handled correctly.
- Reconcile attendance before locking a payroll period to avoid post-payment adjustments.
- Encourage daily self-check-in to reduce the manual burden on HR and improve data accuracy.

HR & PAYROLL

Leave Management

Updated 2026-07-17

The leave system lets employees request time off, managers approve it, and HR track balances automatically. It covers everything from annual and sick leave to unpaid and compensatory time.

Setting up leave types

- Go to HR > Leave Types and click New.
- Name the type — Annual Leave, Sick Leave, Maternity Leave, Unpaid Leave.
- Set the annual allocation, whether it is paid, and whether unused days carry forward to the next year.
- Define rules such as maximum consecutive days, whether it can go into negative balance, and whether documentary proof is required.

Building leave policies

A leave policy bundles several leave types with their entitlements into a single package you can assign to an employee, a grade, or a department. This means a new joiner automatically receives the correct annual, sick, and casual leave allowances based on their role rather than you configuring each person by hand.

Allocating leave

Leave is granted through a **Leave Allocation**, which credits an employee's balance for a period — usually a calendar year. You can allocate in bulk at the start of each year, and the platform will carry forward eligible balances from the previous period according to each leave type's rules.

Requesting and approving leave

- The employee opens the portal, selects Apply for Leave, and chooses the leave type and date range.

- The system shows the available balance and flags any conflict, such as insufficient days or overlapping requests.
- On submission, the request routes to the employee's designated leave approver or department approver.
- The approver reviews the team calendar, then approves or rejects with a comment. The employee is notified of the outcome.

Balances and the leave calendar

Approved leave immediately reduces the employee's balance and appears on the shared **Leave Calendar**, so managers can see team coverage before approving overlapping requests. Employees can view their own balances and history at any time from the portal.

Leave and payroll

Approved paid leave counts as payable days in payroll, while unpaid leave reduces salary proportionally. Because leave and attendance are linked, an approved request automatically marks the relevant dates as *On Leave* — you do not mark attendance separately.

Best practices

- Assign a leave policy through the employee grade so entitlements stay consistent.
- Run allocations at the start of each year and confirm carry-forward balances are correct.
- Require proof for sick leave beyond a set number of days to maintain governance.
- Encourage managers to check the leave calendar before approving to protect coverage.

HR & PAYROLL

Shifts and Rosters

Updated 2026-07-17

Shift management lets you define working patterns and assign them to employees, so attendance, overtime, and payroll all calculate against the correct hours. This is essential for teams that work beyond a single fixed daytime schedule — retail, support desks, field operations, and round-the-clock sites.

Defining a shift type

- Go to HR > Shift Types and click New.
- Name the shift — Morning, Evening, Night — and set the Start Time and End Time.
- Configure the grace periods: how many minutes late still counts as on time, and how early a check-in is accepted.
- Enable Auto Attendance so the platform converts check-in and check-out logs into attendance records for this shift automatically.
- Set thresholds for marking absent and for flagging early exits or late entries.

Assigning shifts

Use a **Shift Assignment** to place an employee on a shift for a date range. You can assign one person, or assign the same shift to a whole team in bulk. For a single default pattern, set the shift directly on the employee record and every day inherits it.

Building a roster

For rotating schedules, create assignments across a weekly or monthly grid so each employee cycles through morning, evening, and night as required. The roster view shows the full team laid out by day, making it easy to confirm every shift is covered and no one is double-booked. Publish the roster and employees see their upcoming schedule in the portal.

Shift requests and swaps

Employees can raise a **Shift Request** from the portal to ask for a specific shift or a swap. The request routes to the shift approver, who confirms or declines. Approved requests update the roster automatically, keeping the published schedule and payroll in sync.

How shifts affect payroll

- Overtime: hours worked beyond the shift window can be flagged and paid at configured rates.
- Night allowances: shift-based components in the salary structure reward unsocial hours.
- Accurate attendance: auto-attendance ties each check-in to the right shift, so payable hours are precise.

Best practices

- Set realistic grace periods to reduce disputes over marginal late arrivals.
- Publish rosters well ahead so staff can plan and request swaps in time.
- Review overtime reports weekly to control cost and spot understaffed shifts.
- Pair shift types with the correct holiday list so weekly offs land on the right days for each pattern.

HR & PAYROLL

Payroll: Salary Structure, Salary Slips, and Payroll Runs

Updated 2026-07-17

Payroll in Octavion turns attendance, leave, and pay rules into accurate salary slips and a single disbursement run. It has three building blocks: earning and deduction components, the salary structure that combines them, and the payroll run that generates slips for everyone at once.

Step 1: Define salary components

A **Salary Component** is any line on a payslip. Create *earnings* such as Basic, Housing Allowance, Transport, and Overtime, and *deductions* such as Income Tax, Social Insurance, and Loan Repayment. For each component you can set a fixed amount or a formula — for example, Housing as 25 percent of Basic — so figures recalculate automatically when base pay changes.

Step 2: Build the salary structure

- Go to HR > Salary Structure and click New.
- Add the earning and deduction components that apply, with their amounts or formulas.
- Set the payment frequency, usually monthly, and the currency.
- Save and submit the structure, then create a Salary Structure Assignment to attach it to each employee from a given effective date.

You can maintain several structures — for different grades, branches, or contract types — and reuse each across many employees.

Step 3: Run payroll

- Open HR > Payroll Run (payroll entry) and click New.
- Select the pay period, company, and the employees or departments to include.
- Choose the payment date and the account funds will be paid from.
- Click Create Salary Slips. The platform pulls each person's structure, applies their payable days from attendance and leave, and drafts a slip for everyone.
- Review the drafts, then Submit to finalise. Optionally push a bank payment file and email each employee their slip.

Understanding a salary slip

Each slip shows gross earnings, total deductions, and net pay, along with the payable-days calculation so the employee can see how attendance affected the figure. Slips post to the accounting ledger automatically, keeping payroll expense and payable balances accurate without re-entry.

Corrections and off-cycle pay

If you spot an error before submitting, edit the draft slip directly. After submission, issue a correcting slip or an additional payment rather than editing history. Use an additional salary entry for one-off bonuses or arrears outside the regular run.

Best practices

- Lock attendance for the period before creating slips so payable days are final.
- Use formula-based components so allowances scale automatically with basic pay.
- Reconcile the payroll total against your bank disbursement before releasing payment.
- Keep structure assignments dated so historical slips always reflect the pay rules in force at the time.

HR & PAYROLL

Expense Claims and Reimbursements

Updated 2026-07-17

The expense claim system lets employees submit business costs they paid personally — travel, meals, fuel, supplies — for approval and reimbursement. It routes each claim

through the right approver and posts the reimbursement so finance and payroll stay in sync.

Setting up expense types

Before employees can claim, define the categories they will use. Go to **HR > Expense Claim Type** and create types such as Travel, Accommodation, Meals, Fuel, and Office Supplies. Link each type to the correct expense account so approved claims post to the right ledger automatically.

Submitting a claim

- The employee opens the portal and selects New Expense Claim.
- They add one or more line items, each with an expense type, date, description, and amount.
- They attach receipts or invoices as proof for each line — required for audit and often for tax.
- They choose whether the amount was paid personally (for reimbursement) or on a company card, then submit.

Approval workflow

On submission, the claim routes to the employee's designated **expense approver** or the department approver. The approver reviews each line against the attached receipts and the total, then approves, rejects, or sends it back for correction with a comment. The employee is notified at each step, and the claim's status moves through *Draft*, *Submitted*, *Approved*, and *Paid*.

Reimbursement

Once approved, the reimbursable amount can be paid two ways:

- Direct payment: finance records a payment against the claim from a bank or cash account, settling it outside payroll.
- Through payroll: the approved amount is added to the next salary slip as an additional earning, so it reaches the employee with their pay.

Either way, the claim posts to accounting so the expense and the payable are recorded correctly.

Advances

For large or upcoming trips, employees can request an **Employee Advance** before spending. When they later file the expense claim, the advance is adjusted against it and only the balance is reimbursed or recovered — keeping cash exposure controlled.

Reporting

- Track spend by expense type, department, or employee to spot trends and control cost.
- Review pending claims so nothing sits unapproved and employees are reimbursed promptly.
- Reconcile company-card claims separately from personal reimbursements.

Best practices

- Require a receipt on every line so claims are audit-ready.
- Set clear per-category limits and communicate them to reduce rejected claims.
- Approve on a regular cadence so reimbursements are predictable for staff.
- Reconcile outstanding advances monthly to avoid unrecovered balances.

HR & PAYROLL

Employee Onboarding and Exit

Updated 2026-07-17

Onboarding and exit templates turn the messy, checklist-driven work of bringing someone in and letting them go into a repeatable, trackable process. Instead of relying on memory, Octavion assigns every task to an owner and shows you completion at a glance.

Building an onboarding template

- Go to HR > Employee Onboarding Template and click New.
- Add each activity a new joiner needs — issue equipment, create system accounts, run orientation, collect signed documents, assign a buddy.
- For each activity set the responsible role (HR, IT, the hiring manager) and the number of days from joining by which it should be done.
- Save the template. You can maintain different templates by department or designation.

Running onboarding

When a new hire is confirmed, create an **Employee Onboarding** record and select the template. The platform generates every task with owners and due dates, and each responsible person sees their items in their task list. As tasks are completed the record shows live progress, so HR always knows what is outstanding. Once the person joins, you can promote the onboarding record straight into a full employee record, carrying over the details already captured.

Managing the exit process

Departures follow the same structured approach with an **Employee Separation** template. Build it once with all the offboarding steps — knowledge handover, return of assets, revoking system access, final document collection, and the exit interview — each assigned to a role with a deadline relative to the last working day.

- Create an Employee Separation record for the leaving employee and apply the template.
- Set the Relieving Date and track each offboarding task to completion.
- Conduct and record the exit interview so feedback is captured for future improvement.

Final settlement

Before you close a departure, settle outstanding balances: pay salary for days worked in the final period, encash unused leave where policy allows, clear approved expense claims, and recover any outstanding advances or loans. Process these through a final salary slip so the last payment is complete and reconciled.

Closing the record

Once offboarding tasks and settlement are done, set the employee's status to **Left** and record the relieving date. Never delete the record — retaining it preserves payroll, attendance, and document history for audits and any future rehire.

Best practices

- Maintain separate templates for roles with different equipment or access needs.
- Assign every task an owner and a deadline so nothing slips between teams.
- Revoke system access on the last working day as a security priority.
- Always complete final settlement before marking the employee as Left.

11

MODULE 11

Account & Billing

8 topics in this module:

- Understanding Your Subscription & Per-Seat B...
- Managing Seats & Inviting Your Team
- Upgrading, Downgrading & Cancelling Your Plan
- Invoices, Receipts & Payment Methods
- Account Security & Data Isolation
- Managing Notification Preferences
- API Keys & Integrations
- How to Get Support

Understanding Your Subscription & Per-Seat Billing

Updated 2026-07-17

Octavion is billed on a per-seat, per-product model. Each person who needs to sign in is a seat, and you pay for the products that person is entitled to use — Smart ERP, Advanced CRM, Call Center, Octavion HR, and e-Invoicing are licensed independently. This lets you give a warehouse clerk only Smart ERP access while a sales manager gets both Advanced CRM and Call Center, and pay accordingly.

How pricing is calculated

Your bill is built from three simple parts:

- Seats — the number of users you have invited and activated under Settings → Team & Seats.
- Products per seat — each product a seat is entitled to open adds to that seat's monthly rate, since every product carries its own per-seat price.
- Billing cycle — charges recur automatically on the same calendar day each month.

Your total is simply the sum of every active seat multiplied by the products assigned to it. You can view the live breakdown at any time under **Settings** → **Subscription & Billing**.

Your free trial

New workspaces start with a **7-day trial**. During the trial you have full access to the products you selected at sign-up, and your saved payment method is not charged until the trial ends. If you cancel before the final day, no charge is raised.

When the trial converts, your first invoice reflects only the seats and products active on that date — so it always matches what you are actually using.

Reading your subscription page

Open **Settings** → **Subscription & Billing** from the left menu. There you can:

- Review each product subscription — Smart ERP, Advanced CRM, Call Center, Octavion HR, and e-Invoicing — listed with its own per-seat price.
- See how many seats are assigned to each product so you can confirm the counts match your team.
- Use the Cancel Subscription button on this page if you ever need to stop a product.

To cross-check the seat side of the equation, open **Settings** → **Team & Seats**, where every active user and the seats they occupy are listed together.

Proration and mid-cycle changes

When you add a seat or entitle a seat to a new product partway through a billing cycle, Octavion prorates the charge so you only pay for the remaining days. Deactivating a seat mid-cycle credits the unused portion toward your next invoice rather than issuing an immediate refund. This keeps your bill

accurate as your team grows or contracts.

Tip: Because you are billed per seat, the fastest way to control costs is to keep **Settings** → **Team & Seats** tidy — deactivate users who no longer need access, and only entitle each seat to the products that person actually opens. Every product you remove from a seat comes straight off that seat's monthly rate.

Where to make changes

- Add or activate a user — Settings → Team & Seats (a paid seat is required; if none is free, buy or upgrade a seat first).
- Change what a seat can use, or cancel a product — Settings → Subscription & Billing.
- Review your upcoming charge and per-seat pricing — Settings → Subscription & Billing.

Because seats and products are decoupled, your subscription always mirrors your real team — you never pay for access no one is using.

ACCOUNT & BILLING

Managing Seats & Inviting Your Team

Updated 2026-07-17

Every colleague who works in Octavion occupies a seat on one or more products, and seat management is fully self-service: you can see exactly how many seats you own and use, create a login for a new teammate in under a minute, and buy an extra seat right where you need it — checkout opens with your saved billing details, and the new seat is usable the moment payment completes. Everything happens on one page: **Team & Employees** under **Settings**.

What you can do here

- Seats on your plan — the panel at the top lists every product you subscribe to with a used-versus-paid counter (for example 3/4 · 1 left). Each product is a separate seat with its own monthly price, so the answer to “how many more people can I add?” is shown per product. If usage ever exceeds what you pay for, it is shown honestly as over rather than hidden.
- + Add seat — sits next to each product in the seats panel. One click opens checkout for one more seat of that product using your saved details; the price is shown at checkout. As soon as payment completes, the counter updates and you can assign the seat immediately.
- Add employee — creates a login for a teammate: full name, work email, a starting password, and a role — Admin, Supervisor, or Agent.
- Give access to — inside the new-employee form, tick the products this person's seat should include. Each product shows how many seats remain, and the form totals what your selection adds to the monthly bill before you confirm.
- Buy a seat — when a product in the form shows no seat left, it is not a dead end: a Buy a seat button appears right on that product so you can purchase one and keep going, without leaving the

page or contacting support.

- The roster — every employee with their role, product badges, and a status of Can sign in or Disabled. From the actions column you can Reset password, temporarily Disable or Enable sign-in, or Remove the person entirely. You can also change anyone's role directly from the roster.

Step by step: add a teammate when you are out of seats

- Open Settings > Team & Employees and click Add employee.
- Enter the person's full name, work email, and a starting password, and choose their role.
- Under Give access to, tick the products they need. If a product shows no seat left, click Buy a seat next to it — checkout opens with your saved details, and the exact price is shown there before you confirm.
- After payment you return to the page with the seat available. Finish selecting products and click Create employee.
- Share the email and starting password with your colleague — they can sign in right away. You can rotate their password anytime with Reset password.

Tips & troubleshooting

- Only an Admin can add employees or buy seats. If checkout refuses with a permission message, ask a workspace Admin to complete the purchase.
- Grant the narrowest role that still lets someone do their job: Admin manages settings, billing, and the team; Supervisor adds oversight of the team's work; Agent is for day-to-day work and sees their own activity. Page access per role is fine-tuned in Roles & Permissions.
- Seat limits are enforced everywhere — including invitations sent from inside Advanced CRM, which follow the same per-product seat counts as this page.
- Disable versus Remove: disable a leaver immediately to block sign-in while keeping their records and history intact; remove them only after their open work and record ownership have been handed over.
- Can sign in is the account, not the phone. Whether an agent's softphone line is connected is managed separately under Call Center > SIP Lines.
- Review the roster monthly: disable leavers promptly and confirm each active person still needs every product on their seat.

ACCOUNT & BILLING

Upgrading, Downgrading & Cancelling Your Plan

Updated 2026-07-17

Your Octavion plan is designed to flex with your business. You can subscribe to new products, adjust seat counts, remove products you no longer need, or cancel entirely — all from your own account, and all without contacting anyone.

Where your plan lives

Open **Settings** at app.octavion.ae/settings and select **Subscription & Billing**. This screen lists every product you subscribe to — Smart ERP, Advanced CRM, Call Center, Octavion HR, e-Invoicing — each with its own per-seat price and its own controls. Seat changes and new-user invites live one section up, under **Team & Seats**.

Upgrading

Upgrading means adding a new product or increasing your seat count.

Add another product

- Open your Workspace at app.octavion.ae/workspace.
- Choose Add more apps.
- Pick the product you want — for example, Octavion HR or Call Center — then confirm the summary, which shows the prorated charge for the remainder of the current cycle.

New products take effect immediately, and a fresh tile appears on your Workspace so your team can start using the capability right away.

Add more seats

Every user needs a paid seat. To grow your team, open **Settings > Team & Seats** and add seats before inviting people. If you invite a teammate when no paid seat is free, the invite is held until you buy a seat or free one up.

Downgrading

Downgrading removes a product or reduces seats. Because you have already paid for the current cycle, downgrades apply at the start of your next billing period, and any unused value is credited toward that invoice.

Before you downgrade:

- Export or reassign records tied to the product you are removing.
- Confirm no active user still depends on that product.
- Reduce seats under Settings > Team & Seats, or remove a product from Settings > Subscription & Billing using the Cancel Subscription control beside it. The preview shows your new recurring total.

Cancelling

Open **Settings > Subscription & Billing** and choose **Cancel Subscription** on the product you want to end — or on each product, to close your account entirely. Select a reason if you like, then confirm. Your workspace stays fully active until the end of the period you have already paid for — cancelling does not cut off access mid-cycle.

After the paid period ends, sign-in is suspended and billing stops. Your data is retained in a read-only, recoverable state for a limited retention window, so reactivating before that window closes restores everything exactly as it was.

Exporting before you leave

If you are cancelling for good, export your key data first. Most modules offer a report or list export to spreadsheet, and your accounting records can be exported for your files. Do this while your subscription is still active to guarantee full access.

Note: Only workspace administrators can add products, change seats, or cancel. If you do not see these options, ask your administrator to make the change or to grant you billing permissions.

ACCOUNT & BILLING

Invoices, Receipts & Payment Methods

Updated 2026-07-17

Octavion keeps a complete, self-service record of every charge so your finance team can reconcile costs without raising a ticket. Payments are handled through a secure, PCI-compliant payment provider, which means your full card details are never stored inside Octavion itself.

Where to find your invoices

Open **Settings** and choose **Subscription & Billing** from the left menu. This is the home for everything related to what you pay.

- Each product subscription is listed with its own per-seat price, so you can see exactly what each app is costing you.
- Your invoice history sits alongside it. Every entry shows the invoice date, billing period, amount, and status (Paid, Due, or Failed).
- Open any invoice to view the line-item breakdown by product and seat, then use Download PDF to save a copy for your records or accounting system.

Invoices are generated automatically at each renewal and emailed to your billing contact. Every PDF includes your workspace name, billing address, and tax details where applicable.

Updating your payment method

Still in **Settings** → **Subscription & Billing**:

- Choose to add or update your card and enter the new details in the secure payment form.
- Set it as the default so future renewals draw from it.
- Remove the old card once the new one is confirmed as default.

For your security, always enter card details directly in the payment form — never share full card numbers by email or chat, and Octavion support will never ask you to.

Choosing who receives billing notices

You can nominate the person who receives invoices and payment alerts from within **Settings** → **Subscription & Billing**. This is often your finance or operations lead rather than the workspace

owner, so receipts and reminders reach the right inbox automatically.

Handling a failed payment

If a renewal charge is declined, Octavion emails your billing contact and marks the invoice as **Due**. Your workspace stays active during a short grace period while retries occur. To resolve it, open **Settings** → **Subscription & Billing** and:

- Confirm the card has not expired and has available funds.
- Add or set a working card as the default.
- Use Retry payment on the outstanding invoice, or wait for the automatic retry.

Clearing the balance within the grace period keeps access uninterrupted. If the balance remains unpaid past the grace period, sign-in is suspended until payment succeeds — your data is preserved throughout.

Taxes and business details

Keep your legal entity name, address, and tax registration number up to date in **Settings** → **Subscription & Billing**. These appear on every invoice, so keeping them current ensures your receipts are valid for accounting and tax purposes.

ACCOUNT & BILLING

Account Security & Data Isolation

Updated 2026-07-17

Your Octavion workspace is a private, isolated environment. Your records, users, files, and settings are logically separated from every other customer, so no one outside your organization can see or reach your data. This article explains the protections in place and the steps you should take to keep your account secure.

How your data is isolated

- Dedicated workspace — each customer operates in its own isolated tenant with its own users, permissions, and storage. Requests are scoped to your workspace so data never crosses between organizations.
- Encrypted in transit — all connections use HTTPS, so information moving between your browser and Octavion is encrypted.
- Role-based access — inside your workspace, permissions control exactly which records and actions each user can reach. You manage these from Settings > Roles & Permissions, right down to individual document types.

Signing in securely

Octavion offers single sign-on across all products — one login from **app.octavion.ae/workspace** gives entitled users access to Smart ERP, Advanced CRM, Call Center, Octavion HR, and

e-Invoicing without re-entering credentials. Each product opens from its tile on the Workspace. To protect that single identity:

- Require strong, unique passwords for every user.
- Turn on the additional sign-in protections available under **Settings > Security** so a stolen password alone cannot grant access.
- Advise your team never to reuse their Octavion password on other sites.

Managing sessions and access

When someone leaves your organization, deactivate their seat immediately from **Settings > Team & Seats**. Deactivation ends their sign-in access at once and frees the paid seat for someone else.

- Review your member list under **Settings > Team & Seats** periodically to spot dormant or unexpected accounts.
- Open **Settings > Active Sessions** to see where accounts are currently signed in, and sign out any session you do not recognize.

Protecting sensitive actions

Certain actions — billing changes under **Settings > Subscription & Billing**, user removal under **Settings > Team & Seats**, and integration key management under **Settings > API Keys** — are restricted to administrators. Keep the number of administrators small, and grant every other user the least-privilege role from **Settings > Roles & Permissions** that still lets them do their job. This limits the damage a single compromised account could cause.

What Octavion will never ask

Octavion support will never ask for your password, full payment card number, or multi-factor codes. Treat any message requesting these as suspicious and report it. Legitimate password resets always come through a link you initiate from the sign-in screen.

If you suspect a breach

- Change the affected user's password immediately from **Settings > Security**.
- Deactivate any account you do not recognize under **Settings > Team & Seats**, and sign out unfamiliar sessions under **Settings > Active Sessions**.
- Rotate your keys under **Settings > API Keys** in case a key was exposed.
- Contact support so the activity can be reviewed.

Acting quickly on these steps contains most incidents before they affect your operations.

ACCOUNT & BILLING

Managing Notification Preferences

Updated 2026-07-17

Octavion can keep you informed about approvals, mentions, deadlines, billing events, and system activity. Tuning your notification preferences ensures you see what matters without being overwhelmed by noise.

Where to set your preferences

Open your profile menu in the top-right corner and choose **Settings**, then open the **Notifications** section from the left menu. You will see the notification types grouped by module — for example approvals, task assignments, Advanced CRM activity, and billing alerts. For each type, choose how you want to be notified.

Notification channels

- In-app — the bell icon in the workspace header collects alerts you can read while you work. This is the default for most activity.
- Email — sends a message to your registered address, useful for items you need to action away from your desk.

Common preferences to configure

- Approvals — turn on email so time-sensitive sign-offs are never missed.
- Mentions and comments — enable notifications when a colleague tags you on a document or a deal in Advanced CRM.
- Assignments — get alerted when a task, lead, or Call Center follow-up is routed to you.
- Billing — keep upcoming-renewal and payment-failure alerts on if you are the billing contact for your workspace.

Reducing noise

If your inbox is crowded, switch low-priority categories to in-app only, and reserve email for items that genuinely require action. You can also stop following a specific document once it no longer needs your attention, without changing your global preferences in the **Notifications** section.

Digest and quiet hours

Where your workspace offers it, enable a daily digest to bundle non-urgent updates into a single summary instead of many separate messages. Quiet hours pause non-critical notifications outside your working day, so you are only interrupted by genuinely urgent items.

Billing and account owners

If you manage the account, keep billing notifications switched on and make sure the right person is set as the billing contact under **Settings > Subscription & Billing**. This ensures renewal reminders and payment-failure alerts always reach someone who can act on them. Who receives which alerts is shaped by each person's role, which owners manage under **Settings > Roles & Permissions**.

Tip: After changing your preferences, trigger a low-stakes event — such as assigning yourself a test task — to confirm alerts arrive on the channels you expect.

ACCOUNT & BILLING

API Keys & Integrations

Updated 2026-07-17

API Keys & Integrations

Octavion can exchange data with the other tools your business relies on. Whether you are wiring up your own internal software, a warehouse scanner, or a website that needs to sync orders, a personal API key is how you give an outside system secure, revocable access to your Octavion account. This article shows you where to create those keys, how to keep them safe, and how your other product connections are managed.

Where API keys live

All of your keys are managed in one place. Open **Settings** and choose **API Keys** from the left menu. From here you can create a new key, review the keys already in use, and revoke any you no longer need.

Creating an API key

- Go to Settings > API Keys.
- Click Create key and give it a descriptive name that identifies its purpose, such as Warehouse scanner or Website order sync.
- Copy the secret immediately and store it somewhere secure. For your protection, the full secret is shown only once and cannot be retrieved later.

If you ever lose a secret, you cannot recover it — simply revoke the old key and create a replacement.

Controlling what a key can do

An API key acts on behalf of the team member it belongs to, so it can only do what that person is allowed to do. To limit a key's reach, tie it to a user whose access is scoped to exactly what the integration needs, and set that scope under **Settings > Roles & Permissions**. A connection that only needs to read inventory should belong to a user who cannot, for example, post invoices.

Using keys safely

- One key per integration. Never share a single key across multiple tools — separate keys let you revoke one without breaking the others.
- Keep keys private. Never embed a key in front-end code or a public repository, where it can be scraped.
- Rotate periodically. Replace long-lived keys on a schedule, and immediately if you suspect one has been exposed. Create the new key, update your integration, confirm it works, then revoke the old one.

Revoking a key

If a key is no longer needed or may be compromised, go to **Settings > API Keys** and click **Revoke** next to it. Revocation takes effect immediately and cannot be undone, so update any integration that

relies on the key first. Review your active keys every quarter and remove any you no longer recognize.

Other connections

Not every connection uses a raw API key. A few are managed for you inside their own areas of Octavion:

- Subscriptions and payments are handled in Settings > Subscription & Billing, where each product you subscribe to appears with its own per-seat price and where you can update or cancel a plan.
- AI features — such as the AI Voice Agent and AI Coaching in Call Center — draw from your AI Wallet, also under Settings. Top it up there and keep an eye on usage in one place.
- Adding people to a connected tool is done in Settings > Team & Seats, or from a product's own invite screen. Each active user requires a paid seat, so free up or purchase a seat before inviting someone new.

Because these are built into the platform, you manage them with a few guided clicks — no keys to copy or store.

ACCOUNT & BILLING

How to Get Support

Updated 2026-07-17

How to Get Support

When you need help, Octavion offers several paths to a resolution. Knowing which one to use — and how to prepare a clear request — gets you answers faster.

Start with the knowledge base

Most questions are answered right here in the documentation at docs.octavion.ae. Use the search bar at the top of the docs to look up a feature or an error message before reaching out; step-by-step guides cover Smart ERP, Advanced CRM, Call Center, Octavion HR, e-Invoicing, and billing. If you are troubleshooting, the relevant product article often lists the exact fix.

Check the right area in your product

Many issues resolve themselves once you are on the correct screen. Open **Settings** from app.octavion.ae and head to the section that matches your question:

- Subscription & Billing — plan, per-seat pricing, invoices, and cancellations.
- Team & Seats — inviting users, seat counts, and who has a paid seat.
- Roles & Permissions — what each user can see and do.

For a problem inside a specific product, open that product from its tile on the Workspace so you are on the exact screen where the issue appears before you report it.

Contact the support team

If the docs don't resolve it, reach the Octavion support team by email. Describe the problem clearly and attach a screenshot. You will get a reply on the same thread, so keep every follow-up there rather than starting a fresh message — the full history stays together that way.

For account and billing questions specifically, make sure the request comes from an administrator or your designated billing contact, since some details in **Settings** → **Subscription & Billing** are only visible to authorized users. You can confirm who holds those roles under **Settings** → **Team & Seats** and **Settings** → **Roles & Permissions**.

Write an effective request

The more precise your report, the quicker the resolution. Include:

- What you were doing — the product, the screen, and the exact action you took.
- What happened — the result, including any error message word-for-word.
- What you expected instead.
- When it started and whether it affects one user or everyone on your team.
- A screenshot of the screen, with the browser address bar visible where relevant.

Never include passwords, full payment card numbers, or API keys in a support message — support does not need them and will never ask for them. You manage your own keys under **Settings** → **API Keys**, where you can revoke and reissue them yourself.

Reporting urgent issues

If a problem is blocking your whole team — for example no one can sign in, or billing is failing across the workspace — say so clearly at the top of your message and state the business impact. Flagging the urgency and its effect helps support prioritize your case ahead of routine questions.

Track and follow up

Reply on your existing email thread rather than opening a new request for the same issue, so the full history stays together and nothing is lost between agents. Keeping one conversation per issue is the fastest route to a resolution.

Feature requests and feedback

If Octavion is missing something you need, send it to the support team as a feature request. Describe the outcome you want rather than a specific implementation, so the team can find the best way to solve it. Well-described requests with a clear business case carry the most weight in planning.