

CRM & sales

Commerce / Core workflow guide

Follow contacts, opportunities and follow-ups.

BUILD STATUS

Development preview 0.1.0. These diagrams describe the shipped core records and state actions. They are not interface screenshots. Full UI walkthrough and live Hostinger acceptance are pending.

The record sequence

1

Contacts

Create this reference data first.

2

Opportunities

References: contacts

3

Activities

References: leads

Follow the workflow

Register a contact, qualify a lead, log follow-ups and record won or lost outcomes.

BEFORE YOU BEGIN

Sign in, select your workspace and open this system. Create referenced records first. Use fictional data for testing and protect any personal or confidential information.

Know your records

Data reference / Inputs and computed values

Contacts

Field	Input type	How to use it
Name	text	Plain text, up to 200 characters.
Company	text	Plain text, up to 200 characters.
Email	email	A valid email address; demo examples are fictional.
Phone	text	Plain text, up to 200 characters.

Opportunities

Field	Input type	How to use it
Contact id	ref	Select a workspace record from contacts.
Name	text	Plain text, up to 200 characters.
Value	money	Non-negative amount; at most two decimal places.
Expected on	date	Calendar date (YYYY-MM-DD).

Activities

Field	Input type	How to use it
Lead id	ref	Select a workspace record from leads.
Name	text	Plain text, up to 200 characters.
Due on	date	Calendar date (YYYY-MM-DD).
Notes	longtext	Plain text, up to 12,000 characters.

Every record also has a workspace identifier, state, version and timestamps. Reference selection and server checks prevent a record from linking to another workspace.

Operate with confidence

Actions, permissions and safe recovery

Available state actions

Record	States	Actions
Contacts	active	Reference data; no state action.
Opportunities	new > qualified > won > lost	qualify to qualified, win to won, lose to lost
Activities	planned > completed	complete to completed

Opportunity outcomes

- Opportunity values are entered in money fields; qualification, won and lost are recorded states.
- An activity references an opportunity in the same workspace.
- Winning a lead does not create an invoice, contract, email campaign or customer payment automatically.

Roles and subscription access

Owners, managers and staff can create records while the subscription is active. Viewers can read. Approval, verification, publishing, payroll settlement and journal posting require an owner or manager. Entitlements and record quotas are enforced on the server. Expired subscriptions become read only.

Documents and recovery

- Use the record PDF action for a private document. CSV export requires an eligible plan. Attachments accept PDF/JPG/PNG up to 5 MB per file; demos cannot upload.
- A stale version or repeated action is rejected. Refresh, inspect the saved state and retry only when appropriate. Processed records cannot be edited as drafts.
- A PDF is a snapshot of recorded information. Ordinary business records do not receive the CEO signature, stamp or company seal automatically.