Software by Design
Nextcloud apps

Customers · Deals · Chase & coaching

CustomerCheck

User manual

End-user documentation for the web app

Today, pipeline, inbox, renewals and team coaching.

App version	Language	Date
1.6.191	**English**	**3 November 2026**

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Introduction

CustomerCheck is the Nextcloud app for customer work on your instance: a shared company book, a deals pipeline, licences and renewals, an assignable inbox, daily and weekly rituals, and team coaching — without Salesforce and without replacing bookkeeping. Postings stay in ProjectCheck, InvoiceCheck and TicketCheck; CustomerCheck links those sources onto one record and shows what is due now. The web app is free under the AGPL; the Android companion needs a CUC2 licence seat (chapter 16).

This manual is organised around what you are trying to do, not around menu items. Read chapter 1 once to know which role you hold, walk the first loop in chapter 2, and after that jump straight to the task chapter you need — every procedure stands alone. The catalogue in chapter 20 maps every screen to its chapter, and the “how do I” index in chapter 18 resolves the questions support hears most.

Status: App-Version **1.6.191** (Commit `28b8854`), 3 November 2026, English (professional tone). Atlas Docs POLICY 3.5.15; product farm `exit_met`.

Audience: **Look only** · **Can edit** · **Can manage team** · app administrators.

What you need: CustomerCheck access · a browser with JavaScript · app-admin rights for **App settings**.
Chapters: 1 Roles · 2–9 Daily work · 10 Inbox · 11–12 Team & import · 13–14 Settings · 15–16 Access & companion · 17–20 Reference.
Register: Running text uses professional you. UI labels in quotes follow the EN locale and are cited unchanged.
Quick start: Sign in → work **Today** → maintain a company and a deal → assign mail → optional **This week**.

1 Roles and permissions

CustomerCheck keeps two different questions apart, and almost every support request about “missing buttons” turns out to be a mix-up between them. The first question is the *app door*: are you allowed to open CustomerCheck at all? The door is controlled by the app administrator under **App settings** → **Access** and is explained in detail in chapter 15. The second question is your *workspace role*: once inside, what may you see and change? That role is assigned per person under **Team & mailbox** and is what this chapter is about.

This version runs **one** organisation workspace per instance. There is no workspace switcher and no second book; everybody with door access works in the same register, and your role alone decides how much of it you can touch.

1.1 The three workspace roles

Look only
: Read access to the shared book: companies, deals, the overview, assigned inbox. No write buttons appear anywhere, there is no **Import** and no **Team** board, and personal promises stay out of reach. This is the role for auditors, management and anybody who should see the pipeline without being able to move it.

Can edit
: The working sales role. You create and change companies, people, deals, agreements and to-dos, you import records, you assign and answer inbox mail, and you make your own weekly promises. On the **Team** board you only ever see and edit your own row.

Can manage team
: Everything **Can edit** can do, plus the coordination layer: the member list and roles, the team mailbox, checklist templates, conflict resolution, GDPR erase, reassignments, OOO cover and the coaching views on the **Team** board. Most teams give this to one or two leads, not to the whole crew.

1.2 Capability matrix

Capability	Look only	Can edit	Manage team
Read companies, deals, overview, inbox	yes	yes	yes
Edit companies, people, deals, to-dos	no	yes	yes
Import records	no	yes	yes
Read / assign inbox mail	yes	yes	yes
Send from the team mailbox	no	yes*	yes
Weekly promises (**This week**)	no	own	yes
Team board, OOO, reassign, coaching	no	own row	yes
Erase company (GDPR) / resolve conflicts	no	no	yes
Workspace settings (**Team & mailbox**)	no	no	yes
App settings (door, licence, feeds)	no	no	no†

* When the manager grants the member send rights on the shared mailbox. † App administrators or the Nextcloud system admin only — this is an instance role, not a workspace role.

1.3 Two roles people confuse

The *app administrator* is not a fourth workspace role. It is a flag on the access page, and it decides who may open **App settings** at all — the door mode, the allow-list, licence seats, reminder jobs and feed tokens. An app admin who is not also a workspace member still cannot edit a single deal; a team manager who is not an app admin sees every screen except **App settings**. In small installations one person usually holds both, which is exactly why the two get conflated.

1.4 Which chapters matter for you

Look only: chapters 2–6 for orientation, plus 15 if the door blocks you. **Can edit**: everything through 12 — that is the daily loop. **Can manage team**: chapters 13 and 11 on top. App administrators start at 14 and 15.

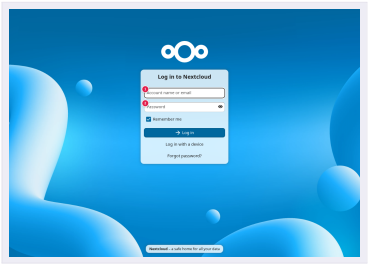
Do not mix up: a weekly promise you make on **This week** is internal work-in-progress, not a *customer promise* recorded on a company; OOO cover shows the backup's work but never moves ownership; and **Forecast** on a deal is an expectation, not booked cash.

2 Getting started

This chapter walks you from the login page to a finished first loop: one company, one person, one deal, and tomorrow's queue waiting for you. Nothing here needs admin rights — a **Can edit** account is enough.

2.1 Sign in

1. Open your Nextcloud address in the browser and enter your username (marker 1) and password (marker 2). CustomerCheck lives inside Nextcloud, so this is the same account you use for files and calendar — there is no separate CRM password.
2. Open **CustomerCheck** from the app menu in the top bar. If the entry is missing entirely, the door is closed for you — see chapter 15.

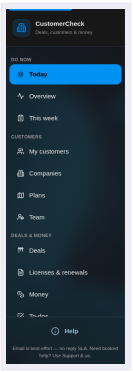


Marker 1: username — marker 2: password. The same Nextcloud account covers every Check app on the instance.

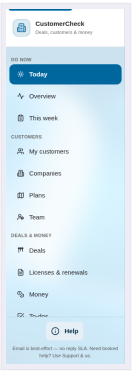
If the door is set to restricted and your name is not on the allow-list, you do not get a greyed-out menu — you get a dedicated **Access denied** page that tells you whom to ask (chapter 15).

2.2 Finding your way around

The sidebar groups everything by the moment you need it, not by data type. **Do now** holds the daily loop — **Today**, **Overview** and **This week**. **Customers** leads to **My customers**, **Companies**, **Plans** and, for managers, **Team**. **Deals & money** collects **Deals**, **Licenses & renewals**, **Money** and **To-dos**. Everything operational — **Inbox**, **My email**, **Conflicts**, **Import**, **Team & mailbox**, **App settings**, **Get the App** and **Support & us** — sits under **Tools**.



Manager sidebar: **Team** and **Team & mailbox** appear.



Member sidebar: the working set without admin entries.

The sidebar is honest about your role: entries you may not use are simply not drawn. A **Look only** account sees reading views only, and there is no hidden URL trick — opening a write address directly answers with the same gate the menu applies.

2.3 Your first loop

Follow this once and you have touched every central object:

1. Open **Companies** and choose **Add company**. Type the name exactly as the customer writes it — say *Brandt & Söhne Maschinenbau*. The slug the app suggests becomes permanent, so glance at it before saving (chapter 5).
2. On the new company page, open the **People** tab and add the person you actually talk to — *Miriam Lohse, office management* — and mark her **Primary contact** (chapter 6).
3. Open **Deals**, choose **New deal** and create *Maintenance contract 2027* on that company with a rough value and an expected close date (chapter 7).
4. Log one next step on the company: a **To-dos** entry like *Intro call — maintenance needs* due in three days (chapter 9).
5. Tomorrow, open **Today**. Your call sits in the queue with **Open** and **Done** — that is the daily loop you will repeat (chapter 3).

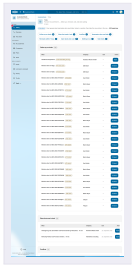
Managers run one extra pass on day one: check members and the shared mailbox under **Team & mailbox** (chapter 13), then look at the **Team** board once so the first Monday review is not a surprise (chapter 11).

3 Today — the daily queue

3.1 What Today is for

Today is the answer to “what needs me right now?”. Instead of making you hunt through companies and deals, the app collects everything with a due edge into one page of queues: deals to chase, promises you made, customers waiting for contact, deal tasks, stagnating plans, shared mail that still needs an owner, open edit conflicts and renewals coming due. Managers additionally see teammates who look stuck, so the page doubles as a stand-up board.

The rule of the page is simple: a row exists because something has a date attached. Finishing the work empties the queue, and an empty queue ends with **All clear** — not with a hidden backlog.



Marker 1: **Today** in the sidebar — the page you open first every morning. Each queue row carries content, company, due date and its action buttons.

3.2 Working a queue row

Every row tells you four things at a glance: what it is about, which company it belongs to, when it falls due, and what you can do with it right now. The actions differ per queue but follow one pattern — **Open** takes you to the record, **Done** marks the underlying item finished, **I'll take it** claims an unowned deal, and **Assign mail** routes an inbox message to a person or company.

1. Open **Today** and pick the first queue that is not empty. Urgent things sort themselves to the top, so trust the order.
2. Read the row: *Follow up on renewal quote — Nordwind Media GmbH — due today*. If the row already tells you enough, act on it directly; otherwise press **Open** and work inside the company page.
3. Finish with **Done** or the row's own action. The row disappears immediately — there is no separate "save" step for queue work.
4. Move to the next non-empty queue and repeat until the page answers **All clear**.

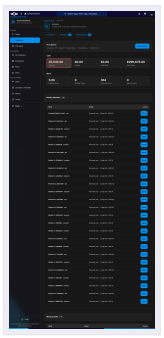
3.3 Edge cases worth knowing

- **Claiming a deal.** An unowned deal in the chase queue shows **I'll take it**. Pressing it makes you the owner in the same click; if a teammate was faster, the app says the deal was just claimed — reload and pick another row rather than retrying blindly.
- **Overdue does not vanish.** Rows do not scroll away at midnight. An overdue call simply sits higher tomorrow, so the queue stays honest about age.
- **Mail needs a decision, not a delete.** Shared-mail rows leave the queue when the message is assigned or deliberately marked handled — chapter 10 covers the triage flow.
- **Viewer accounts** see the same queues but no action buttons; the page is still the fastest read on what is on fire.

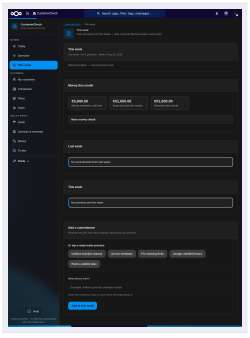
4 Overview and This week

4.1 Overview — how the customers are doing

Overview is the thirty-second health check of the book: coverage per account, deals that moved or stalled, renewals on the horizon and the customers nobody has touched lately. It answers the morning question "is the book healthy?" before **Today** answers "what do I do about it?". Coverage here means contact freshness — a company with a recent logged call counts as covered, one untouched for weeks drifts into a gap, and gaps are what the page exists to surface.



Overview: the health read on the whole book.



This week: owned promises for the running week.

Read it like a dashboard, act on it like a list: every block links into the company, deal or queue behind it, so the move from “that looks wrong” to the actual record is one click.

4.2 This week — promises you can keep

This week is where you commit to a small, honest set of weekly promises — the calls, mails and renewals you intend to finish before Friday. You add a promise with a title and a company, the week collects them per member, and managers see the whole team’s board for the Monday review.

A promise has exactly three honest endings: done (with the note or file that proves it), carried over deliberately, or missed so the team can see it. That is the point of the ritual — the page makes commitments visible instead of letting them evaporate in a notebook.

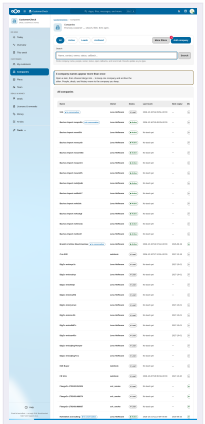
1. On Monday, open **This week** and add the handful of promises you can actually keep — for example *send the renewal quote to Nordwind Media*.
2. During the week, close each promise with **Done** and a short evidence note; the app asks for proof on purpose, because a promise without a trace is a wish.
3. In the review, whatever is left is carried or dropped openly — the page is a mirror, not a punishment.

Terminology check: these are internal weekly promises. A *customer promise* — something you told the client you would deliver — lives on the company timeline and in deal follow-ups, not on this board.

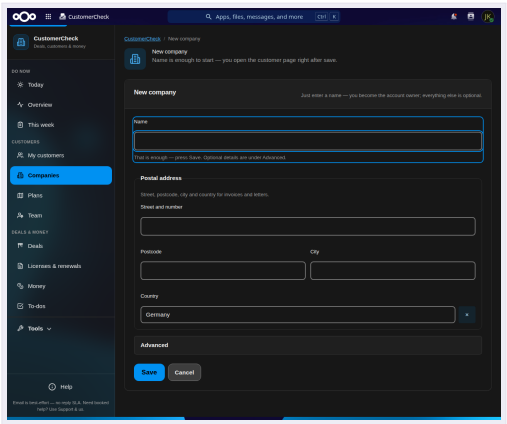
5 Companies — the shared register

5.1 The register

Companies is the full customer register: every account the team works with, its status, owner and coverage in one list. Search matches as you type, filters narrow by status, and the archive toggle keeps dead accounts available without letting them clutter the working view. A **Look only** role reads the same list; nothing about the register is per-person — there is one book and everybody reads it.



Marker 1: **Add company**. The list shows status, owner and coverage per row; archived rows stay behind the filter.



The create form asks for a name; the slug it suggests is permanent.

5.2 Creating a company

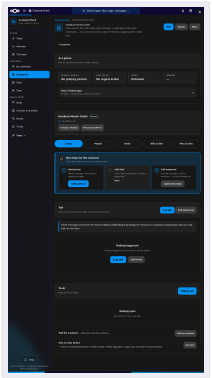
1. Press **Add company** and type the name the customer uses on paper — *Hafenblick Consulting*, not an internal nickname. Duplicate-name hints appear as you type; if the company exists, open it instead of forking the record.
2. Check the suggested slug before you save. The slug feeds links and integrations and **cannot be changed later**, so a wrong slug means merge, not rename.
3. Pick the country from the searchable ISO list when invoicing or tax context matters, and save. You land on the company page and automatically become its **Account owner** — ownership can be reassigned later by a manager, but the creator starts with it.
4. Add the first person next (chapter 6); a company without a contact is a shell the queue cannot route work to.

5.3 Archive and search edge cases

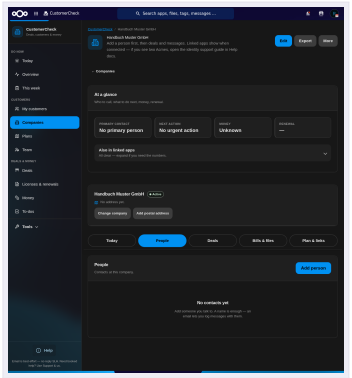
- **Archive is reversible.** **Archive** parks the account and hides it from queues and the default list; **Restore** brings it back with history intact. Erasing under GDPR is a different, irreversible act (chapter 6).
- **Archived rows still answer search** when the archive filter is on — that is how you find an old account before creating a duplicate.
- **Duplicate names are flagged**, not silently merged. "%n company name appears more than once" in the header means two records share a name; open both and merge them (chapter 6) before the team splits its history.
- **Empty list.** "No companies yet" is literal — create the first one by hand or run **Import** (chapter 12); nothing else in the app invents customers.

6 The company page — 360° view

Open *Nordwind Media GmbH* and you land on the 360° page: one screen that holds everything the team knows about the account. The header carries status, coverage and the action bar; the tabs below split the record into working views.



The 360° header: status, coverage and actions; tabs below organise the record.



The **People** tab — roles, contacts and the one active primary contact.

6.1 Header actions

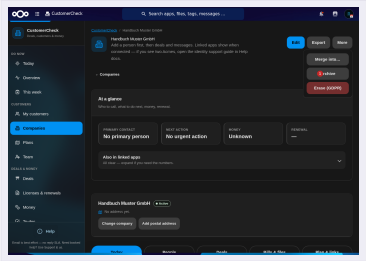
Edit opens the master-data form — the same fields as creation, minus the slug. **Export** downloads a data pack of the whole record for hand-over or audit. Everything destructive hides under **More**, deliberately one click deeper:

Merge into…
: folds this company into a target you pick: people, deals, agreements, to-dos and history move,

and the source ends up archived. Merge is the fix for duplicates — archive alone leaves two half-lives behind.

Archive / Restore
parks and unparks the account (chapter 5). Reversible, and the normal end for a lost customer.

Erase (GDPR)
scrubs the record for an erasure request. Managers only, behind an explicit confirmation, and irreversible — anonymising beats deleting the invoice trail the finance apps still need.



Marker 1: **Archive** under **More** — destructive actions sit one deliberate click deep, next to merge and GDPR erase.

6.2 The five tabs

Today
the account-local queue: open to-dos, upcoming renewals and next moves for this customer only.

People
the contacts. **Add person** records name, role, mail and phone; a person flagged **Primary contact** is who mail and renewals default to. Exactly one active buyer role is allowed — assigning a second primary moves the flag, it never multiplies it.

Deals
this account's slice of the pipeline — same stages as chapter 7, filtered to the company.

Bills & files
posted invoices and the linked **Files folder**. Amounts come from the bookkeeping apps (chapter 8); documents land in the folder you attach here, not in a parallel CRM storage.

Plan & links
the account plan (MAP) and the sister-app links: ProjectCheck projects, TicketCheck tickets, InvoiceCheck customer. Linking is what makes coverage, money and tickets appear on this page.

6.3 Edge cases

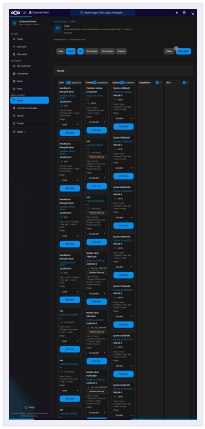
- **Coverage turns red on neglect.** If nobody logs a touch for weeks the header warns and the account drifts into the **Overview** gap list — the fix is a logged call, not a settings switch.
- **Export vs. erase.** An export taken before a GDPR erase keeps the data lawful to hold only if the request allows it; the pack is for migration and audit, not a workaround around erasure.
- **Prepare a meeting** builds a briefing from timeline, open deals and open to-dos — the fastest way into a customer call you did not prepare for.

7 Deals and the pipeline

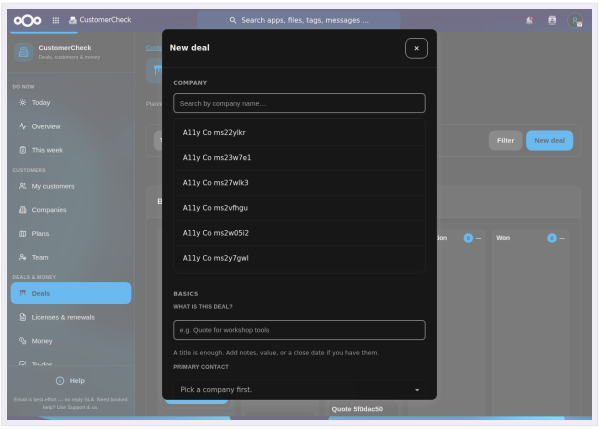
7.1 How the pipeline works

A deal is a quote or an opportunity attached to one company. **Deals** shows the whole pipeline either as a **Table** for sorting and scanning or as a **Board** that groups deals by stage; the choice is yours and sticks per user under **Preferences**. The stages are fixed on purpose: **Lead** → **Contacted** → **Quoted** → **Negotiation** → **Won** or **Lost**. Fixed stages are what make the pipeline comparable across the team — nobody invents a private “almost won” column.

Won and **Lost** are terminal. A deal that ends stays closed for the record and does not reopen; a revived opportunity is a new deal with its own clean history, not a resurrection.



Marker 1: **New deal**. The board groups open deals by stage; *Mobile seats upgrade* sits in **Negotiation**.



The new-deal dialog: title required, company, stage, owner and an optional forecast.

7.2 Creating and moving deals

1. Press **New deal** (marker 1 on the board). The title is required — write the customer’s project, not an internal code: *CRM rollout workshop*, not *HAF-2026-07*.
2. Pick the company and the starting stage, set the **Owner** and, if useful, a **Forecast** value and **Expected close**. The forecast feeds expectations on **Overview**; it is never booked as cash.
3. Move the deal by dragging the card on the board or editing the stage in the table. A deal parked too long in one stage shows its age — “%1$s (%2$s) — %3$d days in stage” — and that age is what lands it in the chase queue on **Today**.
4. Closing **Lost** always asks for a **Loss reason**. Write the real one — price, timing, no decision — because the reason list is the only honest input the next pipeline review gets.

7.3 Claims, checklists and sequences

Unowned deals advertise **I’ll take it**: one click makes you the owner and the deal drops out of the team’s chase queue. If two people click together, the second sees “deal just claimed” — reload, the book has already decided.

Checklist templates from **Checklists** (chapter 13) attach a step sequence to the deal card — the qualification steps your team agreed every quoted deal must pass. Steps tick off on the card itself, so a deal in **Quoted** visibly carries its missing discovery call instead of hiding it in someone’s head.

7.4 Limits that protect the book

- **No silent overwrites.** Two people editing the same deal produce a conflict entry (chapter 11), never a last-writer-wins record.

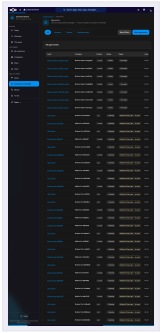
- **Forecast ≠ revenue.** **Money** (chapter 8) only counts what the bookkeeping apps posted; a rosy forecast never inflates the cash view.
- **Required fields are few on purpose.** Title and company are the only hard demands; everything else exists to make the deal findable and reviewable later.

8 Licences, renewals and money

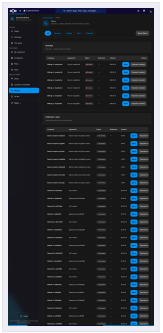
8.1 Licenses & renewals

Licenses & renewals holds the commercial agreements behind the accounts: licence subscriptions and partner packages, each bound to a company and to product codes from the **Catalogue** (chapter 14). A **New agreement** records kind, product code, term and value — for example an `azc` licence for *Nordwind Media GmbH* or a `pc` package for *Hafenblick Consulting*.

Renewals are a calendar problem the app solves for you. Each agreement produces reminders on a fixed cadence — **60, 30, 7 and 0 days before, plus 7 days after** the renewal date — and every reminder fires once per snapshot, not on every page load. The 60-day mark is the moment to send the renewal quote; day +7 is the grace wake-up call before access questions get loud. Fired reminders land in the renewal queue on **Today** and on the company page, so nobody "discovers" an expiry after the fact.



Licenses & renewals: agreements with renewal dates and reminders.



Money: posted invoices and overdue cash from the sister apps.

Partner packages carry an hours budget. Booked hours arrive in **15-minute steps** — the app rejects arbitrary minute values because partner billing runs on quarter hours — and the agreement warns visibly once consumption crosses roughly 80 %, early enough to upsell instead of overrunning silently. A **Delivery pack** summarises the agreement for the customer; *partner mail* sends the consumption statement.

8.2 Money — honest numbers only

Money is a read model, not a ledger. It shows open and overdue amounts exactly as the bookkeeping apps posted them — InvoiceCheck invoices, ProjectCheck and TicketCheck customer links are what feed this page (chapter 6 explains linking). Two consequences follow:

- **Empty means unlinked, not zero.** If the page shows nothing for an account you know has invoices, the sister-app link is missing or the app is absent — CustomerCheck never prints a fake € 0,00 to fill the silence.
- **Money is read-only here.** You chase an unpaid invoice by opening the underlying record in InvoiceCheck; the CRM side tracks the *activity* (the reminder call on **Today**), not the posting.

9 To-dos, My customers and Plans

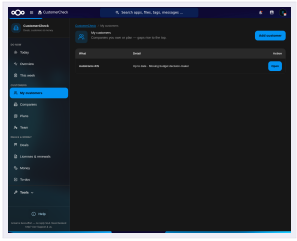
9.1 To-dos — the follow-up list

To-dos is the team's open follow-up list: calls, mails, meetings and notes with an owner and a due date. Most entries are born on the company page — *log, don't remember* is the rule, because a to-do on the record shows up in the register, on **Today**, and in coverage, while a sticky note shows up nowhere.

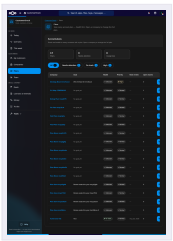
1. Create the entry on the company (*Intro call — maintenance needs*) or straight on **To-dos**, with type (**Call**, **Email**, **Meeting**, **Note**), a **Due date** and an **Owner**.
2. Assigning to a teammate notifies them — assignment is a handover, not a suggestion. Your own filter *assigned to me* turns the page into a personal list.
3. Done entries close with a click; a note or file on the entry doubles as the evidence a weekly promise asks for (chapter 4).
4. Optionally mirror entries into your Nextcloud tasks — the link keeps both sides honest without double bookkeeping.



To-dos.



My customers.



Plans.

9.2 My customers — your own patch

My customers is the register filtered to what you own: accounts where you are **Account owner** or carry the plan. The page is deliberately blunt about coverage gaps — accounts nobody touched recently surface at the top, because the customer you forget is the customer who churns. Working the list is the second daily habit after **Today**.

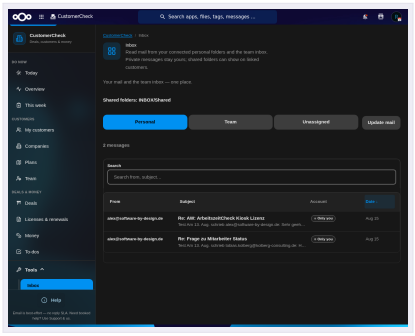
9.3 Plans — account plans (MAP)

Plans holds the mutual action plans: longer-running account plans with goals, health and the next moves agreed with the customer. A plan has a health read and a sequence of moves; when a plan stagnates — no move done, no touch logged — it drifts into the **Today** queue as a nudge instead of dying quietly on a tab nobody opens. Keep plans alive by doing the moves, not by editing the health field.

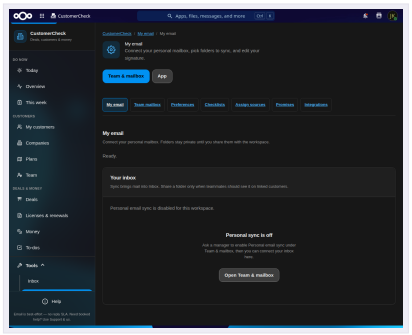
10 Inbox — mail triage that reaches the book

10.1 What the inbox collects

Inbox under **Tools** is the bridge between mail and the register. It shows your own connected mailbox, the shared team mailbox, and the messages that need a decision. The app matches senders to people and companies automatically; what it cannot match is not spam-filtered away — it waits in triage for a human to say where it belongs. Mail never writes itself onto a record; assigning is always your call.



Inbox: personal mail, team mailbox and unmatched messages in one triage.



My email: your own mailbox connection stays private.

10.2 Triaging a message

1. Open the message. The preview shows the thread and the candidates the app matched — a person, a company, or *unknown*.
2. **Matched:** confirm the suggested company or person with **Assign mail**. The message lands on the record's timeline and leaves the queue.
3. **Unmatched:** pick the company it belongs to, or use *add as new company* when a prospect writes for the first time — company creation and assignment happen in one step, so first-contact mail never gets lost in a forwarding chain.
4. **Not CRM:** mark it handled without assigning. Private and unrelated mail leaves the queue deliberately, not silently.

Mail triage is the same work on a dedicated board for the pile-up days — the unmatched list alone, built for speed.

10.3 Sending from the team mailbox

The **Shared mailbox** sends as the team address, not as you. Write access plus the manager-granted send right controls who may send; the send itself carries an idempotency key, so a retried click or a flaky connection can never double-send the same answer to a customer. Threads sent from here are visible to the team — that is the point of a shared address: continuity when somebody is out.

10.4 Privacy and limits

- **My email stays yours.** Your personal mailbox connection feeds matching and lets you log relevant mail; the app never publishes your private correspondence to the team.
- **Related is not shared.** A message the matcher marks *related* to a company becomes visible on that record — assign consciously when the content belongs there.
- **Review sources** define which mailboxes and folders the inbox even looks at (chapter 13); a missing source means missing mail, not lost mail.

11 Team board and conflicts

11.1 The team board

Team is the manager's coordination page — visible to **Can manage team** roles and, in a slim own-row form, to every **Can edit** member. Each row is a person: what they own, what is stuck, what needs chasing, and how the week looks. Managers use it for the Monday review, for 1:1 preparation and for spotting the teammate whose queue grew faster than their week.

The board answers three questions without a meeting: who needs help (stuck rows surface on top), who is away, and what happens to their work meanwhile.

11.2 OOO — cover without ownership transfer

Marking a member out of office does *not* reassign their book. The named backup sees the absent person's due work inside their own **Today** as cover rows — clearly marked, clearly temporary. Ownership, account history and forecasts stay with the absent member, which is exactly what you want: the backup answers calls and sends the renewal quote, and when the owner returns there is nothing to hand back because nothing ever left.

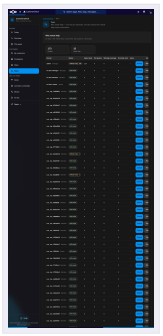
11.3 Reassignment — when ownership really moves

Real handovers — a leaver, a territory change, a rescue — run through **Reassign**: deals, accounts and promises move together as one confirmed bundle, not object by object. The bundle is explicit so nothing is half-moved: you review the whole set, confirm once, and the receiving owner sees the work appear in their queues the same moment. Escalations on the board flag the rows a manager should look at first.

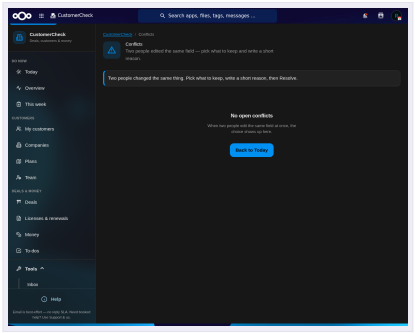
11.4 Conflicts — parallel edits made safe

Two people editing the same record at the same time could silently destroy each other's work; CustomerCheck refuses to let that happen. The second save produces a **Conflicts** entry instead of overwriting — nothing is lost, and nothing is merged silently either.

1. Open **Conflicts** under **Tools** (managers see all open conflicts; the badge also surfaces on **Today**).
2. Open the entry: you see both versions side by side — what each editor changed.
3. Pick the version that survives, write the mandatory reason, and save. The losing edit is not deleted — it stays in the record's trail, so the decision is auditable later.



Team: one row per member — owned work, stuck items, OOO.



Conflicts: parallel edits wait for a human decision.

Why a conflict and not auto-merge: customer records are worse than code when merged blindly — a merged address that is half old street, half new street is not a compromise, it is a data bug with a stamp of approval. The mandatory reason forces the decision into the open.

12 Import — bringing the book in

Import under **Tools** fills an empty register or tops up a living one. It needs a write role — **Look only** accounts never see it, because a bad import is a bulk edit, not a read.

12.1 Sources

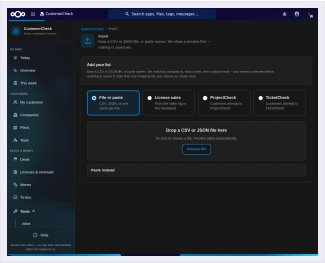
CSV / JSON
: the classic path: a spreadsheet export from your old tool. A company name alone is already enough — extra columns (city, country, contact mail) are picked up when the headers match.

Names only
: paste a plain list, one name per line, when the goal is simply “get the register started”. Details fill in later through normal editing.

Sister apps
: if ProjectCheck or TicketCheck already hold customers on this instance, their tiles appear as sources — importing links the records instead of duplicating them.

12.2 The two-step that protects you

1. Drop the file or pick the source. The app parses it and shows a *preview*: how many rows, which columns it recognised, which names look like duplicates of records you already have.
2. Read the preview honestly — duplicate hints and unmapped columns are warnings, not decoration. Then confirm with *import selected*. Only what you checked enters the register.



The preview-first design exists because imports are the cheapest way to create a thousand mistakes at once. A mistyped CSV is easier to fix on the preview table than inside forty company records.

12.3 Edge cases

- **Duplicates.** Names matching existing companies are flagged in the preview; skip them or import and merge afterwards (chapter 6) — the register does not merge on its own.
- **Partial failures.** Rows that fail validation are listed, not silently dropped — fix the file or create those few by hand.
- **No dry-run charge.** Previewing costs nothing and writes nothing; you can rehearse an import as often as you like.
- **After the import** the new companies behave like hand-created ones — they need people, an owner and the first logged touch before coverage means anything.

13 Workspace settings

Workspace settings split cleanly into what every member tunes for themselves and what managers tune for the team. Everyone gets **My email**, **Preferences** and **Integrations**; the manager-only sections live under **Team & mailbox** and its neighbours.

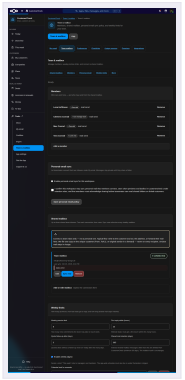
13.1 Personal settings

My email
: connects your own mailbox (IMAP) so the inbox can match your mail to records. The connection is personal: the app reads for matching, your private correspondence never becomes team content (chapter 10).

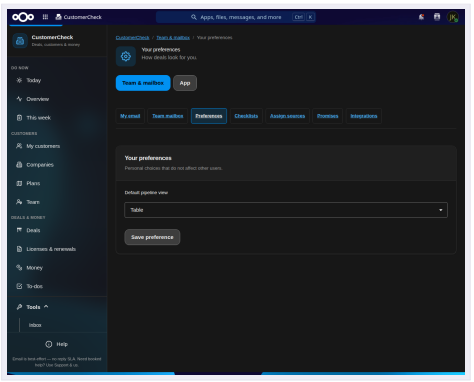
Preferences
: holds your defaults — most visibly whether **Deals** opens as **Table** or **Board**. It is per user; changing it never touches a teammate’s view.

Integrations

links the outside: calendars for follow-ups, Nextcloud tasks for to-dos, file folders for companies. Each integration is listed with its state, so a broken link is visible rather than silently absent.



Team & mailbox: members, roles and the shared mailbox connection.



Preferences: your own pipeline default and personal options.

13.2 Manager sections

Team & mailbox

manages members and their workspace roles (chapter 1) plus the shared mailbox: IMAP/SMTP connection, watched folders and the send policy that decides which members may mail as the team address. Test the connection here before blaming the inbox for silence.

Checklists

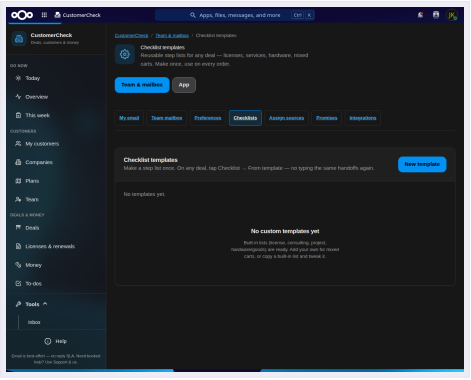
are the step templates deals can carry (chapter 7). A template names the steps once — discovery call, quote sent, security review — so every deal card can run the same honest sequence.

Assign sources

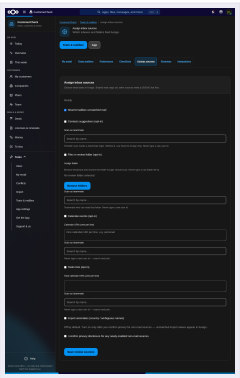
declares where review items and inbox sources come from, per source and GDPR-aware: mailboxes, folders, calendar URIs. A source that is off produces no items — by design, not by bug.

Promises / Circle

govern the weekly promise ritual: who reviews, and the circles the review rotates through (chapter 4).



Checklists: reusable step templates for deals.



Assign sources: review and inbox sources, per source and GDPR-aware.

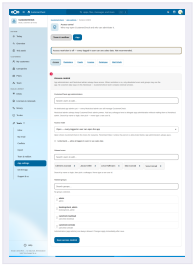
Rule of thumb: if a setting touches one person it lives in the personal sections; if it changes what the whole team sees — mailbox, roles, sources — it is a manager section and the menu only draws it for managers.

14 App settings — the admin layer

App settings is visible to app administrators only (chapter 1). Everything here is instance-wide: the door, licence seats, reminder jobs, feeds, the product catalogue and system mail. A wrong toggle on these pages affects every user, so the sections are few and each is labelled for what it does.

14.1 Access

Access owns the door: the access mode (**Open — every logged-in user can open the app** vs. restricted with an allow-list), the allow-listed users and groups, and the app-admin flag itself. Marker 1 on the screenshot is the form that decides all of it. The full behaviour — including the fail-closed empty list — is documented in chapter 15.



Marker 1: the access form — mode, allow-list and admins in one place. An empty list in restricted mode fails closed: only app admins still get in.

14.2 Automation and integrations

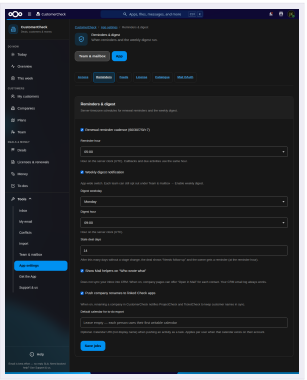
Reminders
: schedules the background work: renewal reminders (the 60/30/7/0/+7 cadence from chapter 8), digest mails and the job list that shows when each runner last fired. A stopped job means stale queues — check here first when **Today** looks suspiciously empty.

Feeds
: issues the ICS feeds and webhook tokens that pipe CustomerCheck dates and events outward — renewal reminders into a shared calendar, queue events into a chat. Tokens are rotatable: rotate when a link leaks, never share one across tools.

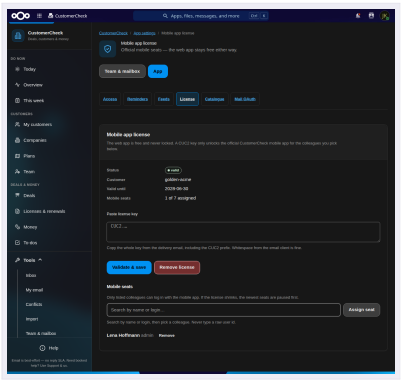
Catalogue
: maintains the product codes (chapter 8) agreements may reference. A code that is inactive disappears from *new* agreements while existing ones keep it — history stays honest.

License
: manages CUC2 companion seats: how many mobile users may connect, who holds a seat. The web app itself stays free under the AGPL — seats only gate the phone (chapter 16).

Mail OAuth
: and *personal mail* configure the instance-side OAuth and system-mail plumbing the team mailbox and personal connections rely on.



Reminders: job schedule and last runs — the first stop when reminders go quiet.



License: CUC2 companion seats are managed on the web, not on the phone.

Boundary check: a team manager who cannot find one of these sections is not missing rights by accident — the menu is correct. App settings deliberately answer to the instance, not to the workspace.

15 Access — the app door

15.1 Two modes

The door is configured under **App settings** → **Access** and has exactly two modes:

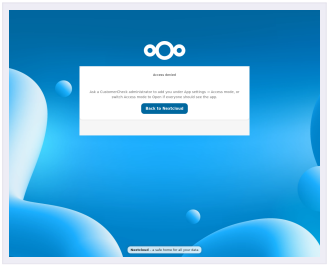
Open — every logged-in user can open the app
: Anybody with a Nextcloud login reaches CustomerCheck. The natural mode for a dedicated CRM instance where every account is staff.

Restricted with allow-list
: Only the users and groups on the list pass the door; everybody else gets **Access denied**. The mode for shared instances where Nextcloud hosts more people than the sales team.

The mode change applies immediately — no logout, no cache window. An allow-listed group works as a group: add a hire to the group in Nextcloud user management and the door opens for them at the next request, without touching CustomerCheck again.

15.2 Fail-closed by design

Restricted mode with an **empty** allow-list does not fall back to open — it closes the door for everyone except app administrators. That is deliberate: a door that silently opens when misconfigured is not a door. If your team suddenly sees **Access denied** after an admin session, the first thing to check is whether the allow-list was emptied while restricted stayed on.



Access denied: the block page for users outside the allow-list — an honest stop, not a broken link.

15.3 Blocked? What to check

1. **Menu entry missing entirely:** the door is restricted and you are not listed — or the app is disabled instance-wide. Ask the app admin before assuming a bug.

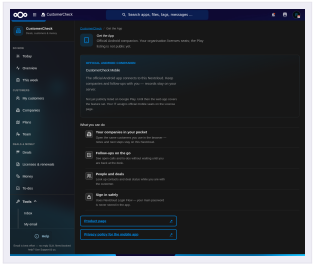
2. **Access denied page:** you are authenticated but outside the allow-list. The page is the answer, not the problem — request access with the person who owns **App settings** → **Access**.
3. **Inside but write buttons missing:** that is not the door — your workspace role is **Look only** (chapter 1). Different layer, different owner: the team manager under **Team & mailbox** fixes roles.
4. **App settings invisible:** you are not an app administrator. The admin flag lives on the same **Access** page — only an existing admin or the Nextcloud system administrator grants it.

The one-sentence summary for admins: the door decides who may open the app, the workspace role decides what they may do inside, and an empty restricted list locks everyone out — including you, if you remove yourself.

16 The companion app (CUC2)

16.1 What the companion is

CustomerCheck on the phone is a companion, not a port: the Android app talks to the same Nextcloud instance and the same book, built for the two minutes between meetings — check today's queue before walking in, log the call while the lift rides down. The web app remains the full workplace and stays free under the AGPL; the companion needs a **CUC2** licence seat, managed on the web under **App settings** → **License**. **Get the App** under **Tools** shows the install route and your seat state.



16.2 Navigation and the web mirror

Five bottom tabs mirror the web book: *Today*, *Companies*, *Deals*, *Agreements* and *Settings*. A company on the phone is the same 360° record as on the web — people, deals, agreements and to-dos included — and a deal claimed on the phone is claimed for everyone. Writes need the same write role as the web plus a valid CUC2 seat; there is no second permission system to learn.

16.3 Offline and the outbox

The companion treats connectivity as weather, not as a requirement:

No internet connection
: the banner that appears when the device drops offline. Reading keeps working from the last sync.

Save for later sync
: the save action offered while offline — CRM notes and activities queue instead of failing.

Saved on this phone — will sync when you are online
: the confirmation that an entry went to the outbox.

Waiting to sync
: the queue state on the record until the upload succeeds; synced notes then reappear under **Today** and on the company timeline on the web.

Nothing queued is lost on a reconnect, and nothing uploads twice — the outbox replays once, in order. What it cannot do is invent data that was never saved: if you killed the app mid-edit, there was no save to queue.

16.4 Seats and device settings

Licence seats are an instance matter, deliberately so: the phone reads its seat state from the server and tells you *license seats are managed by your IT in CustomerCheck on the web* rather than offering an in-app purchase detour. Device settings cover appearance, language, biometric unlock and lock-on-leave — all local to the phone, none of it affecting the book.

17 Accessibility

CustomerCheck is built to WCAG 2.1 AA, the same bar the whole Check suite holds itself to. This chapter collects what that means in daily use — and what to do when something still gets in your way.

17.1 Keyboard operation

Every flow works without a mouse. **Tab** and **Shift+Tab** walk the page in document order — sidebar, content, actions; **Enter** activates links and buttons, **Space** toggles checkboxes, **Escape** closes dialogs and the **More** menu. The board view keeps real buttons per card action, so claiming a deal or closing a to-do is a keystroke, not a drag-only gesture. A visible focus ring tracks where you are — if you ever lose it, the browser's own focus outline is never suppressed.

Dialogs are real `<dialog>` elements: focus moves inside on open, is trapped while the dialog lives, and returns to the trigger on close. There are no `window.confirm` traps anywhere in the app.

17.2 Visual access

- **Contrast** uses the Nextcloud theme tokens, so your instance theme and high-contrast mode carry into the app; status is never colour-alone — badges pair colour with an icon and a text label.
- **Zoom and narrow screens:** the layout is mobile-first and stays usable down to about 320 px without horizontal scrolling; at 200 % zoom the tables reflow into labelled cards instead of clipping.
- **Reduced motion** is honoured — confirmations and transitions collapse to instant changes when the OS asks for it, and forced-colors mode keeps focus and state shapes intact.
- **Touch targets** meet the 44 px floor (48 px for primary and destructive actions), so the app stays operable on a phone browser, not only on the companion.

17.3 Screen readers

Landmarks and headings describe the page structure: the sidebar is a navigation landmark with the current page marked `aria-current`, every table keeps its header cells, and form fields carry real labels — never placeholder-only hints. Async feedback (queue updates, saves, errors) announces through `aria-live` regions, and every field error is tied to its input with `aria-invalid` plus an inline message next to the control, so a screen reader user hears the same explanation a sighted user reads.

17.4 If something blocks you

Accessibility bugs are treated as product bugs, not feature requests: report them through the **Help** footer link in the app or via GitHub Issues, with the page name and the assistive tech you use. The fastest manual check is the keyboard-only happy path — login to **Done** — plus a 200 % zoom pass on **Companies** and **Today**.

18 Troubleshooting and FAQ

18.1 Errors and what they mean

Every message you are likely to meet, in the order you will meet it. The pattern is always the same: the message says what happened, this list says why and what to do.

Access denied
: You are outside the door's allow-list — chapter 15, not a workspace role problem.

Company name is required. / Enter a short title for this deal. / Enter a promise title.
: A required field is empty — the named control is the one to fix; nothing else blocks the save. Losses also want their **Loss reason**.

Add a short reason (at least 3 characters).
: Conflict resolutions and GDPR actions demand a written reason (chapter 11); one honest sentence is enough.

Deal claimed. / Someone else already handled this message. Reload Assign and try again.
: Two people pressed **I'll take it** or triaged the same mail; the book already picked a winner — reload and take another row (chapters 3 and 10).

A company with this short address already exists. Open it instead of creating a duplicate.
: The slug is taken. Open the existing record — the slug is permanent, so the app protects it rather than forking it (chapter 5).

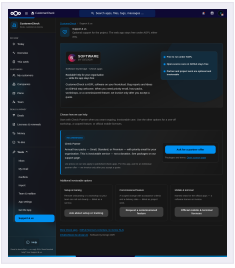
A valid Idempotency-Key is required to send from the shared mailbox.
: The team-mailbox send was retried without its key — resend from the dialog instead of repeating the request manually (chapter 10).

No companies / deals / agreements yet
: Literal empty states: create the first record or run **Import** (chapter 12); the app never fills lists with samples.

All clear
: Not an error — **Today** reporting that every queue is worked off (chapter 3).

Money shows nothing for an account with invoices
: The sister-app link is missing, or InvoiceCheck is not installed — CustomerCheck never fabricates zeros (chapter 8).

Team / Import / App settings missing from the menu
: Role, not a bug: **Look only** hides write surfaces, non-admins hide **App settings** (chapters 1 and 15).



18.2 FAQ — the "how do I…?" index

…get into the app at all?
: Door problem — chapter 15; the allow-list owner is under **App settings** → **Access**.

…start my morning?
: **Today** queues first, then **Overview** gaps — chapters 3 and 4.

…log a customer call?
On the company or under **To-dos** — chapter 9.

…move a deal forward?
Drag on the **Board** or edit the stage — chapter 7; terminal stages stay closed.

…handle a customer leaving?
Archive for the normal case, **Erase (GDPR)** for erasure requests — chapter 6.

…cover a colleague on holiday?
OOO on the **Team** board, not reassignment — chapter 11.

…get CustomerCheck on my phone?
Get the App plus a CUC2 seat — chapter 16.

…fix a doubled company?
Merge into… on the duplicate — chapter 6.

…renew a licence on time?
Trust the 60/30/7/0/+7 reminders or check the queue — chapter 8.

…report a problem?
Help in the nav footer, or **Support & us** — the report link attaches app version and page, never your data.

18.3 Not bugs — deliberate design

- **No organisation switcher.** Version 1.6.x runs one book per instance; a second register is a second installation.
- **Weekly promises ≠ customer promises.** The board tracks internal commitments; client commitments live on the record (chapter 4).
- **Personal mail stays private.** **My email** feeds matching, not publishing (chapter 10).
- **CUC2 gates the phone only.** The web app needs no seat and stays AGPL (chapter 16).

19 Glossary

Domain terms a new reader meets in CustomerCheck and in this manual. UI labels are translated in the app itself — this list explains the concepts behind them.

360° view
the company page: header plus the five tabs that hold everything known about one account (chapter 6).

Account owner
the member responsible for a company; set at creation, movable by **Reassign** — drives **My customers** and queue routing.

Allow-list
the user and group list that passes the door in restricted mode (chapter 15).

App door
the access layer that decides whether you may open CustomerCheck at all — independent of your workspace role.

Claim
taking an unowned deal with **I'll take it**; ownership moves in the same click.

Coverage
contact freshness per account — a recently touched company is covered, a neglected one drifts into the **Overview** gap list.

CUC2
: the licence prefix for companion seats; gates the Android app, never the web (chapter 16).

Fail-closed
: the door's answer to a restricted mode with an empty allow-list: nobody but app admins gets in (chapter 15).

Idempotency key
: the token that makes a retried send harmless — the same mail can never go out twice from the shared mailbox.

MAP
: mutual action plan — the longer-running account plan under **Plans**; stagnating plans surface on **Today**.

OOO
: out of office: backup cover without ownership transfer (chapter 11).

Outbox
: the companion's offline queue — saved-now, sync-later entries that replay once when connectivity returns.

Pipeline
: the fixed deal ladder **Lead** → **Contacted** → **Quoted** → **Negotiation** → **Won** / **Lost**.

Promise (weekly)
: an internal commitment on **This week** with evidence on close — not a promise made to a customer.

Related mail
: a message the matcher ties to a company or person without team visibility until you assign it.

Sequence
: the checklist steps attached to a deal card from a **Checklists** template.

Snapshot reminder
: a renewal reminder that fires once per snapshot date, so the 60/30/7/0/+7 cadence never spams.

Slug
: the company's permanent short address — chosen at creation, unchangeable afterwards.

20 Catalogue — every surface at a glance

Every screen in the app, its menu path and the chapter that explains it. Bookmark this page when you know where you are but not what the screen is for.

Surface	What it does	Chapter
Today	daily queues — deals, mail, promises, renewals, conflicts	3
Overview	book health: coverage, stalled deals, renewal horizon	4
This week	owned weekly promises and the review	4
My customers	your owned accounts and coverage gaps	9
Companies	the full register: search, filters, archive, create	5
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Plans	account plans (MAP): goals, health, next moves	9
Team	member rows, OOO cover, reassign, escalations	11
Deals	the pipeline as table or board, claims, loss reasons	7
Licenses & renewals	agreements, product codes, reminder cadence	8
Money	posted invoices and overdue cash (read model)	8
To-dos	calls, mails, meetings, notes with owner and due date	9
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If a surface in this table is missing from your menu, the answer is almost always role or door — chapters 1 and 15 settle it in two minutes.

About Software by Design

Software by Design builds Nextcloud apps for self-hosted data — time, projects, stock, fleet, CRM. Web UIs are free (AGPL) on your instance; companion apps need a product licence.
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