



ValuMate AI

CRM+

What it is for and how to use it

Every conversation carries value.

A plain-language guide for the ValuMate AI team
crm.valumateai.com

October 2026 | Screens in this guide are drawn samples with made-up names

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TIP

How to use this guide. Read chapters 1 and 2 once (five minutes). After that, keep it open and jump to the screen you are using. The last page is a one-page cheat sheet you can screenshot for your phone. Pictures of screens are drawn samples with made-up names, so nobody's real information appears here.

HEADS UP

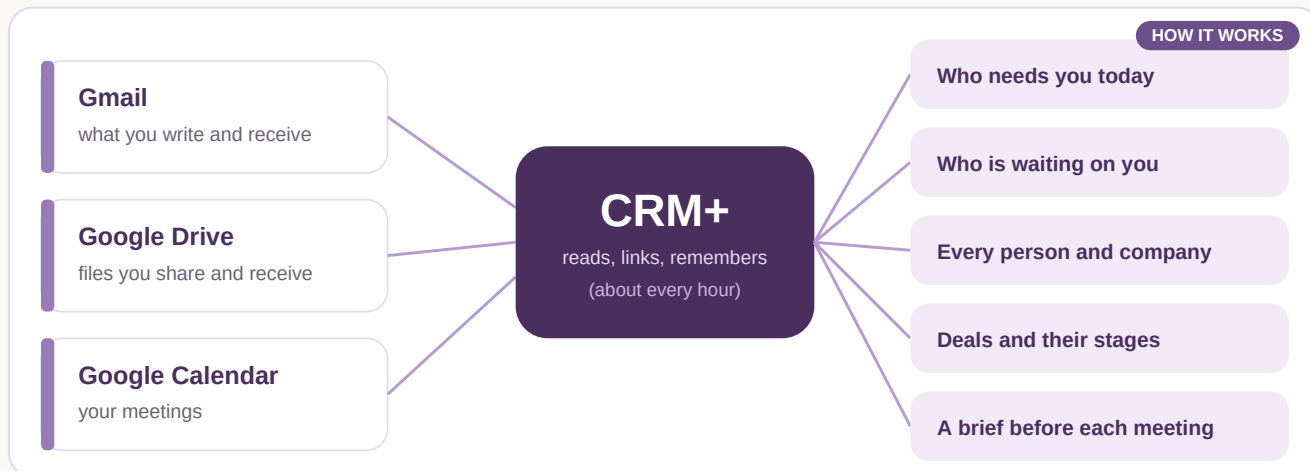
Switched on versus coming. A few features are built but waiting for one more approval or Google permission. They are marked **COMING** in this guide, and chapter 15 lists exactly what works today.

THE BIG IDEA

What CRM+ is

Nobody types data into CRM+. It builds itself from your Gmail, Google Drive and Calendar, and tells you what needs you.

CRM+ is ValuMate AI's own customer system, a private website at **crm.valumateai.com**. It reads the mail you already write, the files you already share and the meetings you already schedule. From that it keeps a living picture of every person, company and deal we work with, and puts what needs you at the top of the page.



How it differs from a normal CRM

	A normal CRM	CRM+
Logging	You log calls, type notes, update fields.	You do not. It reads mail, files and calendar for you.
Freshness	Goes stale the week people stop typing.	Refreshes about every hour from what actually happened.
Where answers come from	Whatever someone remembered to enter.	Your real mail and files, with the quote and a link to the source.
What it does	Stores records and waits for you to look.	Tells you what needs you today, who owes you a reply, which relationship is cooling.
Your fixes	Overwritten by the next import.	Anything you set by hand (a stage, a name, a type) is kept when CRM+ rebuilds.

Four rules it lives by

1. Nobody types

If something is missing, the mail, file or invite is not there yet.

2. Every claim shows its source

A promise shows the exact words. A deal stage links to the email or file behind it.

3. Numbers are never guessed

Counts, dates and dollars are calculated by the software or copied from a document, never invented by AI.

4. It never sends mail for you

You stay in control of every message that leaves your Gmail.

START HERE

Your first five minutes

Sign in, look at Today, and do three small things. That is the whole setup.

Signing in

1. Open **crm.valumateai.com** on your laptop or phone browser.
2. Sign in with your ValuMate AI work account. If it does not let you in, tell Chad. Accounts are added by hand.
3. You land on **Today**. The menu on the left (on a phone, a row across the top that you swipe) takes you everywhere else.

The menu, in one picture

ValuMate AI

CRM+

Search

☒ Today 3

☐ Ask

☐ Team 5

☐ People

☐ Organizations

☐ Pipeline

☐ Calendar

☐ Meetings

☐ Key dates

☐ Drafts

☐ Sync status

☐ Guide

WHAT EACH ITEM IS FOR

Your day: who needs you, who owes you, what is next

Ask a question in plain English, get a cited answer

Chat with the team, on the same screen as the customer

Everyone you have emailed or met, with their history

Companies, their people, their deal and key facts

Every deal by stage, with warning flags

Your week or month, with a brief for each customer meeting

Saved meeting briefs, notes from the call, and your own notes

Renewals, consents and pilot ends found in your files

A log of every draft CRM+ saved to Gmail

Is the data fresh? Any errors?

This guide, as a PDF that opens in a new tab

Your three first things

1. **Look at Today.** Read *Needs you* and *Waiting on them*. Clear one item, even if it is only ticking off a promise you already kept.
2. **Ask one real question.** Open Ask and try "What is open between us and" followed by a customer's first name. Notice the numbered sources under the answer.
3. **Open a person you know.** In *People*, search for a customer you talk to often. Check that the timeline looks right. If it does not, chapter 14 shows how to fix it.

TIP

Empty at first? That is normal for anyone whose mail has not synced yet, or who has no overdue promises. "Nothing needs you right now" is good news, not a bug.

SCREEN

Today

Your day on one screen: what needs you, who owes you, and what is next.

WEDNESDAY, OCTOBER 14

SAMPLE

Good morning, Jordan

Next: Sample Clinic intro call, 10:00 AM [Join](#)

1

3

Needs you

2

2

Waiting on them

128

People

912

Threads, 120 days

2

Needs you

DP

Dana Park

2 days ago

Reply: Question about pricing

[Draft reply](#)

RK

Riley Kim

Fri

You promised: send the revised proposal

SC

Sam Cho

Today

Next step from the call: share pilot dates

[Open the notes](#)

3

Waiting on them

Pat Rivera

No reply in 5 days

[Nudge](#)

Lee Ortiz

No reply in 9 days

[Nudge](#)

4

Coming up

Sample Clinic intro call

10:00 AM, Dana Park

[Brief >](#)

Sample screen drawn for this guide. Names and numbers are made up.

- The four tiles.** How many items need you, how many people are waiting on a reply from them, how many people CRM+ knows, and how many email threads it saw in the last 120 days. Click a tile to jump to its list.
- Needs you.** Promises you made in email (with the exact words), emails from outside people that have waited four hours or more for your reply, files shared with you this week, follow-ups after a meeting, next steps from your call notes (with an [Open the notes](#) link), and reminders you set yourself.
- Waiting on them.** Threads where you wrote last and nobody has answered for two or more days, plus promises other people made to you.
- Coming up.** Your next meetings. Click one to open its brief. Below these you will also see *Cooling* (relationships going quiet) and *Key dates soon* (renewals and pilot ends in the next 30 days).

The actions that matter

- **Close the loop.** Click the circle beside a promise when it is done. On a reminder, click *Done*. It moves off your list.
- **Draft reply or Nudge.** Starts a draft email for you to review. It is saved to your Gmail Drafts, never sent. **COMING:** this needs one more Google permission.
- **Click a name.** It opens that person's page with the whole history.

TIP

The top of Today also shows the weather, a short quote and a *Join* button for your next call. Health labels beside people are **Warm**, **Steady**, **Cooling** and **Cold**: how recent and how frequent your contact has been.

SCREEN

Ask

Type a question the way you would ask a colleague. Get a short answer, with receipts.

Ask CRM+

SAMPLE

1

What did Dana say about pricing for Sample Clinic?

2

Dana asked on Oct 8 whether the per-site price could be lowered for a 3-clinic start. You replied that you would send a revised proposal by Friday. ^{1 2}

No final price has been agreed in the mail you can see. ²

Sources (2)

SOURCES

M

1. Pricing question

Mail, Oct 8

M

2. Pricing question

Mail, Oct 9

3

Draft, reply in thread

Not saved yet

To

dana.park@sampleclinic.example

Subject

Re: Pricing question

Hi Dana, thanks for your patience. I will send the revised proposal on Friday with the three-clinic pricing.

Save to my Gmail Drafts

4

Ask a follow-up, or say draft a reply

↑

Chats on the left, only you can see them.

Every sentence ends with a source number.

Sample screen drawn for this guide. Names and numbers are made up.

- 1 Your question.** Plain English. Names of people, companies or files help it find the right material.
- 2 The answer and its sources.** Every sentence ends with a small number. The numbers match the *Sources* list: the emails or files it used. Click one to open it.
- 3 A draft, if you ask for one.** Say "draft a reply to Dana" and a draft card appears with the recipient, subject and body. Edit anything, then save it to your own Gmail Drafts. Nothing is sent.
- 4 Follow-ups.** Keep asking in the same chat. Past chats are listed on the left, and only you can see them.

What Ask can answer

- What was said, promised or decided in **your** mail and in files shared with you.
- Who someone is, where a company stands, what is open between you, what is on your calendar.

What it cannot answer

- Anything that is not in your mail, your files or the CRM. It will say so in one sentence instead of guessing.
- Things that only live in a teammate's mailbox. You see only what you could see in Gmail yourself.
- The web, the future, or numbers that no document states. Answers are short (five sentences at most), and a sentence with no source is dropped.

HEADS UP

Saving a draft to Gmail is **COMING**: it needs one more Google permission. Until then the draft card works on screen, but the save button shows a notice instead.

SCREEN

People

Everyone you have emailed or met, with one page of history each.

DP

Dana Park
Practice Director, Sample Clinic

Draft

Ask

Files

Pin

1

WHERE THINGS STAND
Last contact
2 days ago

First contact
Mar 2026

Emails
41

Meetings
3

Usual reply
same day

2

Timeline

All
Email
Files
Meetings

M

Re: Pricing question
Dana asked about a lower per-site price for three clinics.

Oct 9

C

Sample Clinic intro call
Meeting notes agreed a 90-day pilot, three clinics.

Oct 3

F

Pilot terms v2
Shared by Sam Cho. Mentions a 90-day pilot.

Sep 29

M

Welcome and next steps
Jordan sent an overview and two time options.

Sep 22

3

Open items

☐
Send revised proposal
You owe, due Fri

☐
Share pilot dates
They owe

4

Manage

Same person as

Choose someone to merge in

Merge into Dana

Sample screen drawn for this guide. Names and numbers are made up.

- Where things stand.** A short summary and the facts: last and first contact, emails, meetings, files and how fast they usually reply.
- Timeline.** Every email, file and meeting in order. Use *All*, *Email*, *Files*, *Meetings* to filter. A call with notes carries a *Meeting notes* tag and a link to open them.
- Open items.** What you owe them and what they owe you, with the original words. Tick one when it is done.
- Manage.** *Same person as* merges a duplicate into this page, so addresses and history come together.

Finding people

The **People** list has a search box (name, email or company) and three views: *Outside* (customers and partners, the default), *ValuMate AI* (our team) and *Everyone*. Name a filter you use often with *Save view*, or download the list with *Download CSV*.

The actions that matter

- Merge** two entries for the same person. Your choice is kept on every rebuild.
- Pin** someone you watch closely. They appear in the menu under *Pinned*.
- Notes with a reminder.** Write a note, pick a *Remind me* date, and it shows up in Today on that day.
- Add to do-not-contact** stops CRM+ from ever drafting outreach to that address.

Also on the page

Meetings with this person and their briefs, *Who knows* them (which teammate is closest, with a health label), *Connected* people they work with, and every email address they use.

SCREEN

Organizations

Companies, their people, and their deal, in one place.

4



Sample Clinic
[sampleclinic.example](#) | Prospect | Proposal

HD

Harbor Dental
 no logo found, initials

SAMPLE

Deal

STAGE

1

Proposal Pricing sent Oct 3. Waiting on a decision.

VALUE

\$48,000 from the draft proposal

OWNER

Jordan Lee updated 2 days ago

MOMENTUM

2

Single contact

Going quiet

11 days in Proposal, last contact 6 days ago

Move to

Proposal

Save stage

Manage

Name

3

Sample Clinic

Save name

What they are to us

Prospect

Who knows them

JL

Jordan Lee
 Closest to Dana Park

Warm

Sample screen drawn for this guide. Names and numbers are made up.

- The deal.** Stage (with the reason and a link to the email or file behind it), value, owner, momentum flags and a forecast line. Use *Move to* to change the stage.
- Momentum flags.** *Single contact* (only one person there has talked to us), *Going quiet* (14 or more days without contact) and *Stalled* (30 or more days in the same early stage).
- Manage.** Rename the organization (type the new name, click *Save name*), or set *What they are to us*: Client, Prospect, Partner, Personal, Other or ValuMate AI.
- Logo and website.** CRM+ fetches the logo from the company's own website. When it finds none, you see a tile with the company's initials. The website link sits under the name.

The Organizations list

Each row shows the company's logo (or initials), its web domain, how many people we know there, its stage, hours of meetings in the last 90 days, last contact and its kind. Filter by *All*, *Clients*, *Prospects*, *Partners*. Saved views and CSV download work here too.

The actions that matter

- Fix the kind.** If a customer shows as "Other", set it to Client or Prospect so filters and the pipeline behave.
- Enter the value and expected close month.** Type the dollar amount and its source (for example, the signed SOW). The forecast counts only values a person entered, and the close month places the deal in the right month.

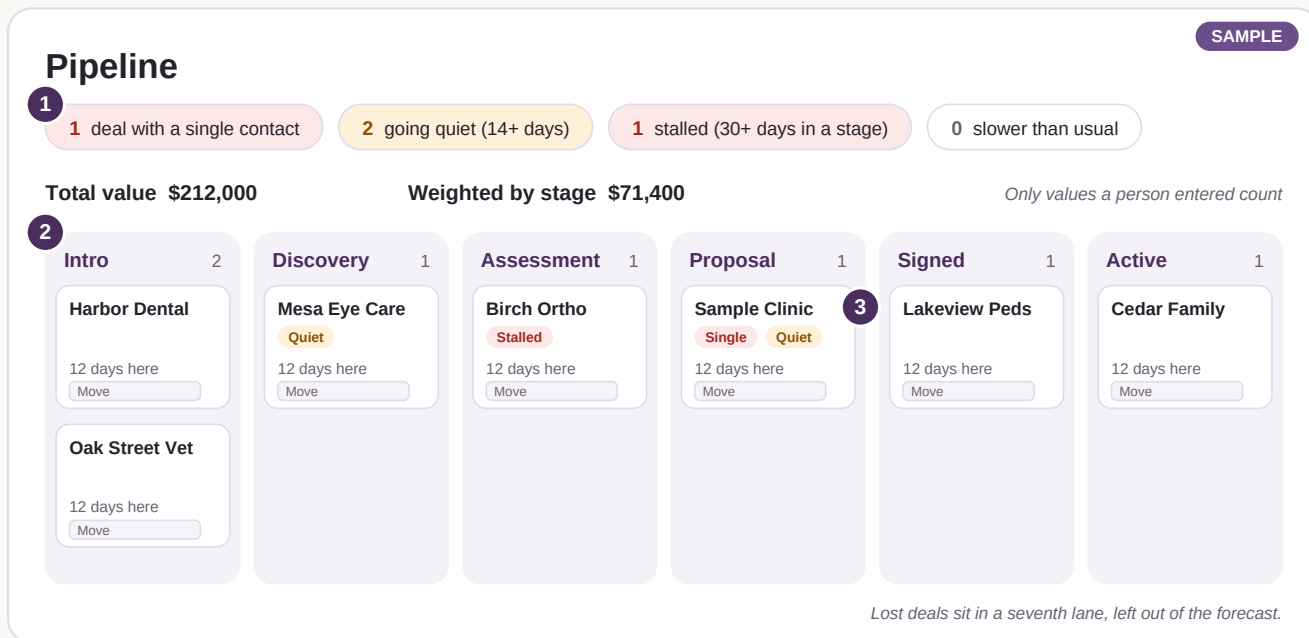
TIP

Who knows them shows the closest teammate. Further down: *Time in meetings*, *Key dates*, *Meetings* and notes with reminders.

SCREEN

Pipeline

Every deal, by stage, with warning flags where something needs a human.



Sample screen drawn for this guide. Names and numbers are made up.

- 1 The warning strip.** Counts of deals with a single contact, going quiet, stalled, or slower than usual. Click a count to filter the board.
- 2 Forecast.** Total value and a stage-weighted value (Intro 5%, Discovery 10%, Assessment 25%, Proposal 50%, Signed 90%, Active 100%). Lost deals are left out.
- 3 A deal card.** The company, its flags, how long it has been in this stage and when anyone last spoke. The dropdown and *Move* change its stage.

Where stages come from

CRM+ reads the mail and files and proposes a stage for each company: **Intro**, **Discovery**, **Assessment**, **Proposal**, **Signed**, **Active** or **Lost**. Each stage shows its reason and a link to the evidence. Move a deal yourself and the card says *set by your name*; rebuilds will not change it back.

The flags, in plain words

Single contact	Only one person at the company has talked to us. Bring in a second person.
Going quiet	An open deal with no contact for 14 days or more.
Stalled	A deal before Signed that has sat in one stage for 30 days or more.
Slower than usual	Well past the typical time deals spend in that stage. Appears once there is enough history to know "typical".

Owner chips above the board show one teammate's deals. Forecast months come from the *Expected close* you set on each organization.

SCREEN

Calendar

Your own week or month, with a brief and a notes slot for each customer meeting.

MY CALENDAR

October 12 to 18, 2026

Week Month

< Today >

MON 12	TUE 13	WED 14	THU 15	FRI 16
9:00 AM Team standup	10:00 Clinic intro Dana Park INTERNAL MEETING NOTES Saved	10:00 Mesa Eye Pat Rivera INTERNAL MEETING NOTES	11:00 AM Focus time	3:00 PM Birch Ortho Lee Ortiz INTERNAL MEETING NOTES
	1:00 PM Weekly planning	2:00 PM Harbor Dental call no brief yet	Free	

Dark purple: customer meeting
 Light purple: INTERNAL MEETING NOTES
 Outside guest, no brief

Past meetings fade. A declined meeting is struck through. A "Maybe" is marked on the card.

Sample screen drawn for this guide. Names and numbers are made up.

How to read it

- **Week or Month.** The switch is at the top right. Month is the default; click a day to open its week. *Today* jumps back, and the arrows move a week or month.
- **Dark purple** is a customer meeting that has a brief. Click it to open the brief.
- **Light purple** says **INTERNAL MEETING NOTES** and sits in the same time slot. Click it to jump to the notes box on that brief. A check and "Notes saved" appear once you have written something.
- **Soft lavender with a purple edge** is a meeting with an outside guest that has no brief yet. Plain white is internal.

Good to know

You see your own calendar only. It syncs about every hour. Admins can switch between teammates' calendars for troubleshooting.

COMING

The same two colors inside Google Calendar. CRM+ will be able to color your customer meeting dark purple and add the INTERNAL MEETING NOTES slot beside it in Google Calendar itself. That needs another Google permission from the admin, and it only ever touches its own marked notes events, never invitations.

SCREENS

Key dates, Drafts and Sync status

Three quieter screens you will visit now and then.

Key dates

Renewals, expirations, term ends, pilot ends and consent dates, found inside the Drive files you can see. Dates are grouped: the same date found in several files or versions shows once, with *and 2 more files*. The page is split into **Coming up** (the next 30 days), **Later**, and **Earlier**, which stays collapsed until you open it.

Key dates SAMPLE

1 All 30 days 90 days Year

All 5 Renewals 2 Term and pilot ends 2 Consents 1 2

Coming up 2 3

NOV 06 **PILOT ENDS Harbor Dental** in 23 days
 "The pilot period ends on November 6, 2026."
 Harbor pilot terms v2 and 2 more files 4 > Quote from the file

NOV 12 **RENEWAL Sample Clinic** in 29 days
 "...renews for a further 12 months on November 12."
 Sample Clinic services agreement

Later 1

MAR 01 **CONSENT Lakeview Peds** in 138 days
 "Consent remains valid through March 1, 2027."
 Lakeview consent form

> **Earlier** 3 Collapsed until you open it

Sample screen drawn for this guide. Names and numbers are made up.

- 1 **The window.** All, 30 days, 90 days, Year limits how far ahead you look.
- 2 **Kind chips.** Narrow to *Renewals*, *Expirations*, *Term and pilot ends*, *Consents*, *Signed* or *Other*. Each chip shows its count, and a chip with nothing in it is left out.
- 3 **The sections.** Each row shows the date, what kind it is, the company, a trimmed quote and the file it came from.
- 4 **The full quote.** One click on *Quote from the file* opens the whole sentence so you can check it. Code and sample files are left out.

Drafts

A log of every draft CRM+ has saved into a Gmail Drafts folder: the subject, who it is to, whose mailbox it sits in and why it was made (reply, nudge, meeting follow-up). CRM+ never sends. Open Gmail to review, edit and send. **COMING:** the log stays empty until drafts are switched on.

Sync status

The health check. It shows totals, each mailbox with a colored dot, the most recent sync runs, and one line on how many calls ValuMate AI hosted that have Gemini notes.

Sync status

9,412 emails, 1,206 files, 128 people and 41 organizations so far.

Gemini notes: 9 of 14 calls ValuMate AI hosted since Sep 4

SAMPLE

Jordan Lee jordan@valumateai.example 3,120 emails	synced 12 min ago
Casey Morgan casey@valumateai.example 2,044 emails	synced 12 min ago
Riley Kim riley@valumateai.example 0 emails Permission not granted	not synced

Sample screen drawn for this guide. Names and numbers are made up.

Green dot	Synced recently. Nothing to do.
Red dot with a message	That mailbox has an error. Wait one hour for the next run. If it is still red, send Chad a screenshot.
Banner: waiting for admin authorization	No mailbox has synced yet. The Google admin must approve CRM+. Tell Chad.

What else is on the page

- **Mailboxes.** Each teammate's mailbox with its email count, when it last synced, and any error message.
- **Recent runs.** The latest sync jobs: what ran, how many items it handled and how long it took.
- **The Gemini line.** "Gemini notes: 9 of 14 calls" counts calls ValuMate AI people hosted that have Gemini notes you may see. A low number usually means *Take notes with Gemini* was not turned on for those calls, not that CRM+ missed them.

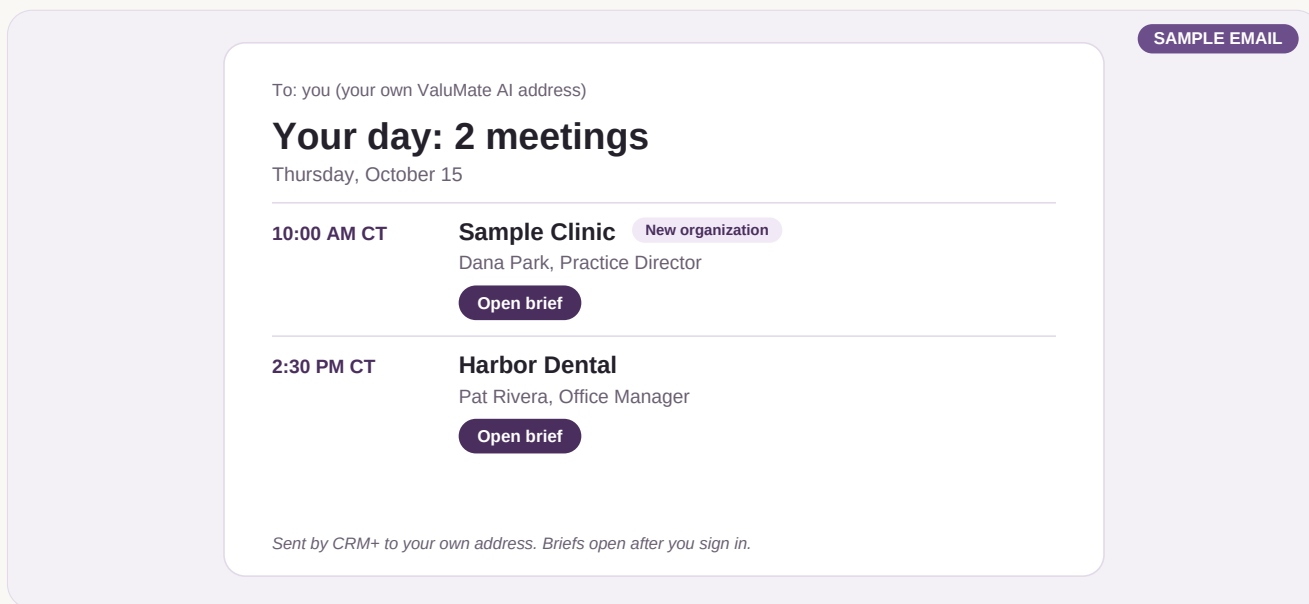
MORNINGS AND MEETINGS

The 7 AM email and meeting briefs

Walk into every customer call knowing the story so far.

What lands at 7 AM Central

Each weekday at 7:00 AM Central, a person who has the email switched on and meetings that day gets one short email from CRM+ titled "**Your day: N meetings**". Each meeting is a row with the time, the organization, the contact's name and title, a *New organization* tag when it is a company we have not met, and an **Open brief** button. The email carries no message content, and it goes only to your own ValuMate AI address.



What the morning email looks like. Names are made up.

COMING

The 7 AM meetings email is on for one person so far (Milton) and coming for the rest of the team. Until yours is switched on, open Today or Calendar and click the meeting to reach its brief. New teammates also get a one-time welcome email at 6:30 AM Central with this guide attached.

TIP

Briefs do not wait for the email. Every weekday morning CRM+ creates a brief for each of your meetings with an outside guest, whether or not the email is on for you. They are already on Calendar, on Meetings and on the person's page.

Before, during and after

- **Before:** read the 30 seconds. If something changed, tap *Rebuild from latest data* near the top of the brief. It works only until the meeting starts, and your notes are kept.
- **After:** a *Notes from the call* card can appear on its own (next page). Add your own notes, tap an outcome, tap *Save notes*. The brief itself stays frozen once written; only notes and outcome change.
- **Where old briefs live:** *Meetings* in the menu lists every saved brief with a pill for Upcoming or the outcome. They are also on each person's and organization's page, and on the Calendar.

Inside a brief

MEETING BRIEF | THURSDAY, OCT 15 | UPCOMING

SAMPLE

Sample Clinic intro call

10:00 to 10:45 AM CT | Sample Clinic | [Join link](#)

[Draft the follow-up](#)
[Notes and outcome](#)
[Rebuild from latest data](#)

30-second read

- Sample Clinic is at the Proposal stage. We have met 2 times before.
 - Last email: Dana asked about pricing, 2 days ago.
 - You owe Dana a revised proposal (due Fri).
 - One guest, Sam Cho, is not in CRM yet.

Who is on the call

- DP

Dana Park
Practice Director, Sample Clinic | last contact 2 days ago

Warm

SC

sam@sampleclinic.example
Not in CRM yet

Unidentified

The thread so far

M	Them	Dana Park	Oct 9
Asked whether a lower per-site price is possible for three clinics.			
M	Us	Jordan Lee	Oct 3
Sent the overview and two time options for a call.			

After the call

- What was said, what was agreed, what to do next

OUTCOME

[Follow up](#)
[Second meeting](#)
[Not a fit](#)

Open items

- We owe: revised proposal, due Fri
"I will send it by Friday"

How to run it

Suggested

DISCOVERY PROMPTS

What would a good outcome look like?
How are decisions like this made here?
Likely objections, with reply ideas

Sample screen drawn for this guide. Names and numbers are made up.

- 30-second read.** A few lines: the deal stage, how many times you have met, the last email, what is open, and who is new. Small source links sit beside each line.
- Who is on the call.** Each person with title, company, last contact and a health label. *Unidentified* means CRM+ has never seen that address.
- After the call.** Your notes, an outcome (*Follow up*, *Second meeting*, *Not a fit*) and a button to draft the follow-up. *Rebuild from latest data* sits at the top until the meeting starts.
- Open items.** What each side owes, with the words from the email.

Reading the rest of the brief

- The thread so far.** The last eight emails with this company, labelled *Us* or *Them*, each with a one-line summary and a link.
- Earlier meetings.** Past briefs with the same people, one click away. When a past call has notes, its line shows a summary and a *Notes* link.
- How to run it.** Suggested discovery questions and likely objections with a reply idea. These are templates, not drawn from your data, so edit freely.

COMING

Web research on the company and attendees is not built yet. Briefs use only your own mail, files and calendar.

AFTER THE MEETING

Notes from the call

When Gemini took notes, CRM+ finds them and puts them where you need them.

1

Notes from the call

The group agreed to start with a 90-day pilot at three clinics. Dana will confirm the start date once her partners have reviewed the pricing.

DECISIONS

- Start with three clinics, review pricing after 90 days.

NEXT STEPS

- Jordan Lee:** send the revised proposal by Friday
- Dana Park:** share the pilot start dates

Transcript in the doc

2

Notes by Gemini | Matched by title and time | Open the doc

Wrong meeting? Dismiss hides these notes from it for good.

Dismiss

3

Also shows up

Today
Next steps become tracked items, with an Open the notes link.

Timelines
On the organization and person pages, with a Meeting notes tag.

Next brief
Same company? The next brief carries a last-time line.

Ask
Ask can find what was said and decided on the call.

Sample screen drawn for this guide. Names and numbers are made up.

- The card.** It appears at the top of *After the call* once a notes document exists for that meeting. It shows the summary, the decisions and the next steps with their owners.
- Next steps.** Each one links to its line in the notes document.
- Where it came from.** The source line says which tool wrote the notes (for example Notes by Gemini), how CRM+ matched them to the meeting, and links to the document. *Dismiss* is for notes that belong to a different meeting: they are hidden from this one and never matched to it again.
- Where else it shows up.** Notes appear on the organization and person timelines, in the next brief for the same company, and Ask can find them.

Next steps become tracked items

When CRM+ is confident the notes belong to the meeting (a match on the calendar attachment, the meeting code, or the title and time), each next step from the notes becomes an item on **Today**, with an *Open the notes* link beside it. Tick it when it is done. A due date is added only when the notes themselves name one. If the match is weaker, CRM+ shows the notes but creates no items.

Good to know

- This works for meetings where notes were taken. Today that mostly means Google Meet calls with *Take notes with Gemini* on, and recaps from meeting-bot emails.
- You see notes only if you could open the document yourself, the same rule as everything else.
- Attendance data from Google Meet** is not on yet. It needs one more Google permission (see chapter 15).

WORKING TOGETHER

Team

Chat with the people you work with, on the same screen as the customer. Nothing leaves the company.

The screenshot displays the 'Team' interface. On the left, a sidebar contains sections: 'Team' with a search bar and a plus button; 'RECORDS' with a list of records (e.g., 'Bayou Health Proposal'); 'CHANNELS' with a list of channels (e.g., '# general', '# pipeline'); 'DIRECT' with a list of direct messages (e.g., 'Dana Ortiz'); and 'TEAMMATES' with a list of teammates (e.g., 'Carson Bankston'). The main area shows a conversation with 'Bayou Health Partners'. At the top, there's a 'Proposal' status and an 'Open record' button. Below this, a 'STAGE' section shows 'Proposal', 'VALUE' shows '\$48,000', 'LAST CONTACT' shows '2 days ago', and 'TEAM TALKING' shows '5 messages'. The conversation history shows a message from Dana Ortiz about a proposal. A 'SPOTTED: COMMITMENT' item is highlighted, showing a message about a proposal deadline. Below this, a message from Chris Avery is shown. At the bottom, a 'TAG FOR CRM+' section allows tagging messages as 'Commitment', 'Deal move', 'Date', or 'Contact'. The right sidebar shows a 'Spotted in this conversation' panel with items like 'Send the proposal', 'Signed', and 'Pilot ends Nov 30, 2026'.

Sample screen drawn for this guide. Names and numbers are made up.

- 1 Your conversations.** Records are the customers you are talking about, Channels are topics, Direct is one person or a small group. Teammates lists everyone on the team: click a name to start a direct message. Bold means unread. The number on **Team** in the menu counts direct messages and @mentions waiting for you.
- 2 The record channel.** Every company and person has one. The strip shows the live facts from the record, so nobody has to ask what stage it is in.
- 3 Spotted.** When a message in a record or public channel sounds like a commitment, a stage change or a key date, CRM+ underlines the words and offers to add it. Nothing changes until someone presses *Add to CRM*.
- 4 Tag for CRM+.** Not sure CRM+ noticed? Tag a message as a commitment, a deal move or a date and it will suggest the fact for you to confirm.
- 5 The side panel.** Spotted items, the open thread, pinned messages, files and who is in the conversation.

Everyday use

- Start a conversation.** Click a name under *Teammates* to message that person, or use the plus button for a new channel or a group message of up to eight people. Everyone is in *#general* and *#crm-alerts* from their first visit. Anyone who can sign in to CRM+ is a teammate in Team, even when their sign-in is not a company mailbox. Automatic senders, shared system accounts and switched-off mailboxes are left out of the list.
- It updates by itself.** New messages, edits, reactions and typing indicators appear without refreshing, and the page reconnects on its own if your connection drops or CRM+ restarts.

- **Write the way you would in Slack.** **bold**, *_italic_*, ``code``, > *quote* and lists work. Press Enter to send and Shift+Enter for a new line. Paste a link and it is clickable.
- **@name** notifies one person, **@here** and **@channel** notify everyone in the channel. Type @ and pick from the list.
- **Threads.** Hover a message and choose *Reply* to answer in the side panel, with *Also send to channel* when everyone should see it. Follow a thread to get its replies in *Threads*.
- **Reactions, pins and saved.** React with an emoji, pin what the channel should keep, and save a message for yourself. *Saved* and *Mentions* are in the left list.
- **Files.** Attach images, PDFs, text, CSV and Office files up to 10 MB with the paper icon. Only people who can see the conversation can open them.
- **Search** finds messages, channels and people. Narrow it with *from:dana*, *in:acme*, *has:file*, *has:link*, *before:2026-10-01* or *is:pinned*. Ctrl or Cmd plus K jumps anywhere.
- **Status and quiet time.** Click your name at the bottom of the list to set a status, turn on do not disturb, or set quiet hours.
- **Reminders and scheduling.** More on a message has *Remind me*. Type */remind in 2 hours call Mei*, or use *Schedule* beside Send to post later.
- **Slash commands.** */org* and */person* post a card, */huddle* shares a Google Meet link, */topic*, */invite*, */dm*, */mute* and */leave* do what they say. */help* lists them.

On the customer's page

The company and person pages have a **Discussion** section, the same conversation as that record's channel in Team. Write there or in Team and it shows in both. Notes you or a teammate saved keep working beside it, including reminders. **Today** adds a *From Team* card with your @mentions and anything spotted that is waiting on you.

What CRM+ does with what you write

- **It reads only public and record channels.** Private channels and direct messages are never read. The line under the message box tells you which kind you are in.
- **It only suggests.** A spotted commitment becomes a note on the record with its reminder date, a stage becomes your own stage choice, a date becomes a reminder. Each shows who said it and the exact words, and *Undo* takes it back out.
- **Dates and numbers come from your words, worked out by the software.** If you wrote "Friday", CRM+ works out which Friday. AI never invents a date.
- **When sources disagree** (a message says Signed, the record says Proposal) the card turns amber and shows both sides. It never shows the email behind the record, because not everyone could open it.

Privacy in Team

- Anyone on the ValuMate AI team can read public channels and record channels. **Private channels and direct messages are visible only to the people in them, admins included.**
- Cards for a company or person show only the shared facts (stage, value, last contact), never email subjects or quotes.
- If you miss a direct message or @mention for 15 minutes, CRM+ can send you one short email saying who wrote and where. It never includes the message, goes only to your ValuMate AI address, comes at most every 30 minutes, and respects do not disturb. You can turn it off under your name.

TIP

Talk about the customer where the customer lives. A comment on the company's page reaches everyone who opens it, and CRM+ can turn it into a tracked item.

TRUST

Privacy and access

The same rule as Gmail: you see your own mail, and nothing is ever sent for you.

ONLY YOURS

Like Gmail

- Your own mail
- Files shared with you
- Your own calendar
- Your Ask chats
- Your meeting briefs

SHARED BY EVERYONE

The company picture

- People and organizations
- Deal stages and values
- Who knows whom, last contact dates
- Counts and the Sync status page

HIDDEN UNLESS IT IS YOURS

Derived from someone's mail

- Email subjects and summaries
- Quotes behind promises and stages
- Key dates quoted from their files

Admins can see everything, only for troubleshooting.

Who can see what, at a glance.

In plain words

- **Your mail stays yours.** You see only the mail in your own mailbox, files that are shared with you (or the whole company), and your own calendar. Teammates never see each other's mail through CRM+.
- **The company picture is shared.** People, organizations, deal stages and values, who knows whom, and last-contact dates are the same for everyone, so the pipeline means the same thing to all of us.
- **Derived material follows its source.** A subject line, a summary, the quote behind a promise or a stage, or a key date quoted from a file stays hidden unless you could open that email or file yourself.
- **Briefs, notes and chats are private.** A brief is visible to the person whose meeting it is. Notes from a call show only to people who could open the notes document. Ask conversations are visible only to you.
- **Team is shared, with private corners.** Public and record channels are open to the whole team. Private channels and direct messages are visible only to their members, and not even admins can read them.
- **Admins can see everything,** only for troubleshooting.

What CRM+ writes, and what it never does

- **Never sends from anyone's Gmail.** It only creates **drafts** in your own Drafts folder, for you to read and send yourself. The software is built and tested so that it cannot send.
- **The only emails CRM+ sends itself** are the 7 AM meetings email (for the people it is switched on for), a one-time welcome email for new teammates, and, once switched on, a short notice when a Team message waits unread. Each goes to your own ValuMate AI address only. CRM+ never emails customers or anyone outside the company.
- **Your fixes are respected.** What you set by hand is never overwritten.

TIP

If you do not want CRM+ to ever draft to someone, open their page and choose *Add to do-not-contact*.

STAYING ON TOP

Good habits and quick answers

Five minutes a day keeps it useful.

Habits that pay off

1. **Start on Today.** Clear what needs you before opening your inbox.
2. **Close loops.** Tick promises you have kept so the list stays true.
3. **Add notes after calls.** Two minutes, one outcome. Next time the brief will thank you.
4. **Set a reminder** on a note when you say "I will check back in two weeks".
5. **Enter a deal value** when you know it, so the forecast is real.
6. **Fix a thing once.** A renamed company, a merged person or a moved stage sticks.

Quick answers

Why is a page empty?	Brand-new people and companies have little history. Data syncs about every hour from your own mail, files and calendar. Check Sync status. "Nothing needs you right now" on Today is good news.
A contact looks wrong, or the name is reversed.	Names come from the mail headers. CRM+ already flips "Last, First" when it is clear. If one is still off, and it is a duplicate, use <i>Same person as</i> on the person's page. A rename for people is not available yet: tell Chad.
How do I rename an organization or fix its type?	Open the organization, scroll to <i>Manage</i> , edit <i>Name</i> and click <i>Save name</i> , or pick <i>What they are to us</i> and save. It sticks.
What do the colors mean?	Dark purple is a customer meeting with a brief, light purple its INTERNAL MEETING NOTES slot. Warm, Steady, Cooling and Cold are contact health. Red and orange flags mean a human is needed. The cheat sheet has the full key.
A deal is in the wrong stage.	On Pipeline, use the dropdown and <i>Move</i> , or on the organization page use <i>Move to</i> . Your choice is kept.
How do I rebuild a brief?	Open it and tap <i>Rebuild from latest data</i> near the top. It works only before the meeting starts, and your notes and outcome are kept.
Notes from the call are on the wrong meeting.	On the card, click <i>Dismiss</i> . The notes are hidden from that meeting and are never matched to it again.
Sync shows an error.	Open Sync status and read the message. Wait an hour, since it retries. If it is still red, screenshot it and send it to Chad.
Can I use it on my phone?	Yes. Open crm.valumateai.com in your phone browser. The menu becomes a row across the top that you swipe.
Needs you shows a promise I never made.	CRM+ reads the wording of your mail and shows the exact quote it used. If it is wrong, tick it done so it leaves your list.
A teammate cannot see something I can.	That is by design. You each see your own mail and files shared with you. Company facts like stages and values are the same for everyone.
Who do I ask?	Chad, for anything about CRM+. He will take Google permission questions to the admin.

STATUS

What works today and what is coming

An honest list, so nobody waits for something that is not switched on.

Switched on today

LIVE	WHAT YOU CAN DO
Sync	Mail, Drive files and calendars sync into CRM+ about every hour.
Today and Ask	Needs you, Waiting on them, Coming up. Questions with cited answers, follow-ups and chat history.
People and Organizations	Timelines, filters, merge, stage, kind, value, notes and reminders. Organization logos from each site, and rename from the Manage box.
Pipeline, Calendar, Key dates	Stages, flags and forecast. Your own calendar. Grouped key dates with a window and kind chips.
Meetings and briefs	A brief for every customer meeting each weekday morning, rebuild before the meeting, and the Notes from the call card once Gemini notes exist.
Next steps as tracked items	Next steps from call notes appear on Today with an Open the notes link, when the match to the meeting is high-confidence.
AI steps	Reading promises from email, deal stage and key dates are switched on.
Team	A Teammates list, channels, direct messages, threads, reactions, files, search, status and reminders, live updates, and a Discussion on every company and person page.
Access rules	You see your own mail, shared files and own calendar. Shared company picture.

Coming

COMING	WHY IT IS NOT ON
Spotted suggestions in Team	CRM+ watches for a few weeks first and is checked against what people accept. Suggestions appear once that looks right.
Team unread emails	Off until Chad switches them on.
The 7 AM meetings email for everyone else	On for one person (Milton) now. The rest of the team is next.
Follow-up labels in Gmail	Needs one more Google permission.
Internal meeting notes slot in Google Calendar	Needs a Google permission.
Gmail drafts	Needs a Google permission. Draft buttons show a notice until then.
Meet attendance	Needs a Google permission.
Web research on the company and attendees in briefs	Not built yet.

COMING	WHY IT IS NOT ON
HighLevel connection	Planned: read from it first, then send notes and tasks back. No dates promised.

TIP

When something moves from **COMING** to live, Chad will tell the team. Until then, nothing in this guide that is marked COMING will happen on its own.

ONE PAGE

Cheat sheet

Screenshot this page for your phone.

SCREEN	USE IT TO	DO THIS
Today	Start your day. See who needs you and who owes you.	Clear <i>Needs you</i> . Tick promises. Open the next meeting's brief.
Ask	Get a quick answer from your mail and files, with sources.	Ask in plain English. Check the numbered sources.
People and Orgs	Know the whole history of a person or company.	Merge duplicates. Set kind, stage, value. Rename an organization. Add a note.
Pipeline	See every deal and what is at risk.	Click a warning count. Move a deal. Check <i>No value set</i> at the bottom of the forecast.
Team	Talk about a customer next to the customer's facts.	Use the record channel. Press <i>Add to CRM</i> on what CRM+ spots. Tag a message it missed.
Calendar	Your week or month with a brief per customer meeting.	Dark purple opens the brief, light purple the notes box.
Meetings	Every saved brief, and what was said on the call.	<i>Rebuild from latest data</i> before a call. Read <i>Notes from the call</i> after.
Key dates	Renewals, consents and pilot ends from your files.	Pick a window and a kind chip. Open <i>Quote from the file</i> to check it.

The colors

Dark purple	A customer meeting with a brief.	Light purple	INTERNAL MEETING NOTES, same time slot.
Warm	Recent, regular contact.	Steady	Contact is ticking along.
Cooling	Contact is slowing. Consider a nudge.	Cold	Little or no recent contact.
Red flag	Single contact, Stalled, Unidentified guest.	Orange flag	Going quiet, waiting on them.

The morning routine

7:00 AM	The meetings email arrives, if it is on for you. Briefs exist either way.
Next	Open Today . Clear what needs you. Nudge anyone you are waiting on.
Before a call	Open the brief. Read the 30 seconds. Tap <i>Rebuild from latest data</i> if something changed.
After a call	Read <i>Notes from the call</i> , tick the next steps on Today, add your notes, tap an outcome, save. Send follow-ups from Gmail yourself.

TIP

Remember: nobody types, every claim has a source, and nothing is ever sent from your Gmail.
Stuck? Ask Chad.