

# Sayl CRM

For the people who actually talk to customers —  
your inbox, your tools, and how to get good fast.

Version 1.0 · 10-minute read for new agents

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# 1. What you do as an agent

If you're reading this, you're the human end of every customer conversation. Sayl gives you the tools; the actual relationship is yours.

Day to day, an agent:

- **Watches the inbox** for conversations assigned to them — Sayl auto-routes them based on language, workload and which inboxes they belong to.
- **Replies** from the chat view, with sentiment and voice transcription quietly running in the background.
- **Adds context** to the contact (tags, language, pipeline stage) so the next person who sees them already knows who they are.
- **Hands off** the conversation when needed — to a colleague (transfer) or to a manager (escalate).
- **Closes** the conversation when the customer's question is answered. Sayl re-opens automatically if the customer messages again.

## What you can't do (and why)

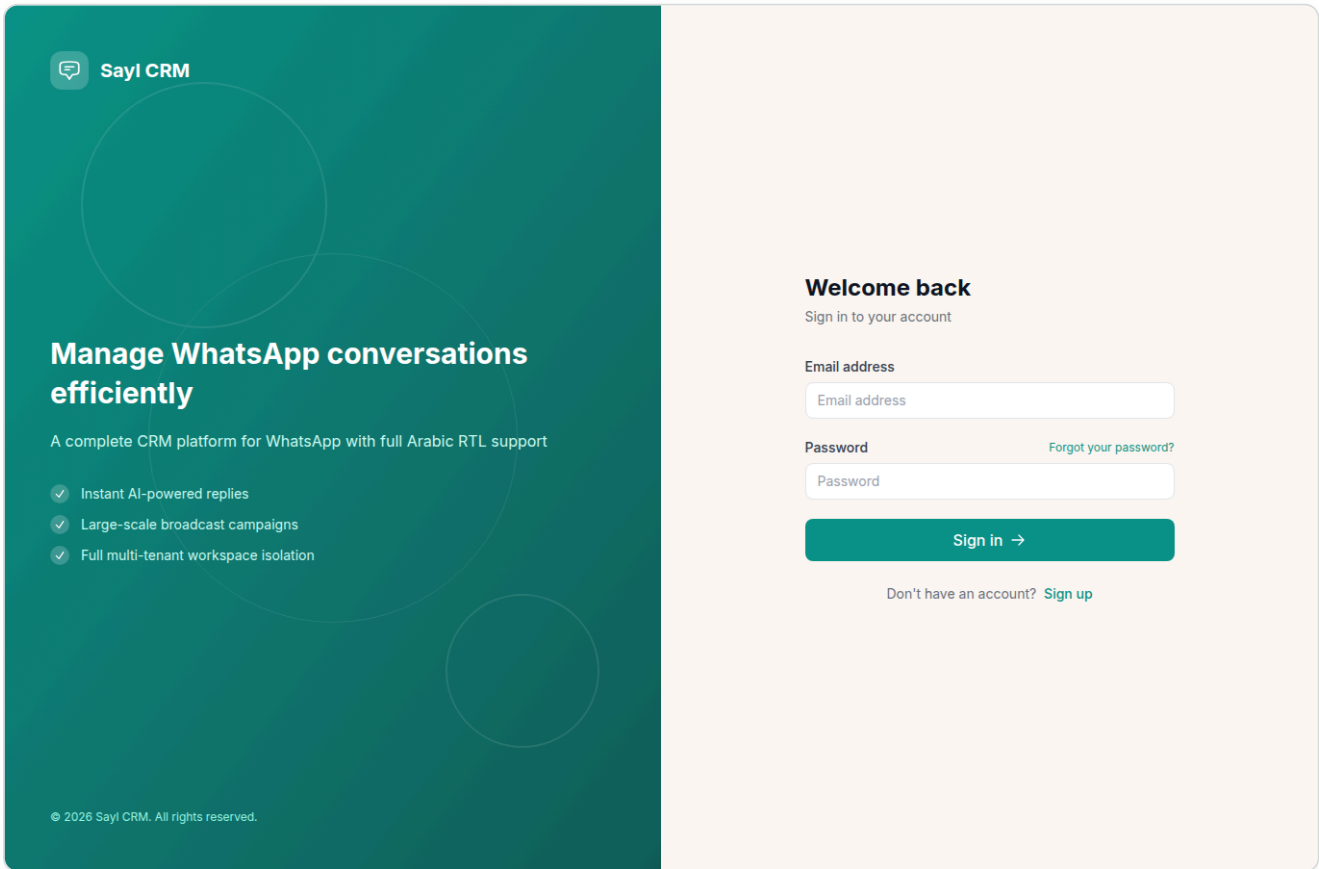
You can't	Reason
Send broadcast campaigns	That's a Manager / Owner job — broadcasts cost money per message.
Configure channels, AI keys, or webhooks	Those are platform-level settings owned by the workspace Owner.
See another agent's conversations	Inbox membership scopes what you see. Internal-note  mentions still work cross-team.
Hard-delete a contact or message	Audit-trail integrity. Use <i>Close</i> for conversations and tags for "do not contact".

### You don't need to be perfect — you need to be visible.

Sayl's reports show first-response time, average handle time and SLA compliance. None of those punish you for honest mistakes; they punish silence. If you don't know an answer, leave a note for a colleague or escalate. That counts as work; ghosting a chat doesn't.

## 2. Logging in & switching workspaces

Open `https://<your-sayl-host>/login` on any modern browser (Chrome and Safari are best supported).



*The login page — email + password, with the language toggle in the top corner. Same screen every Sayl user sees.*

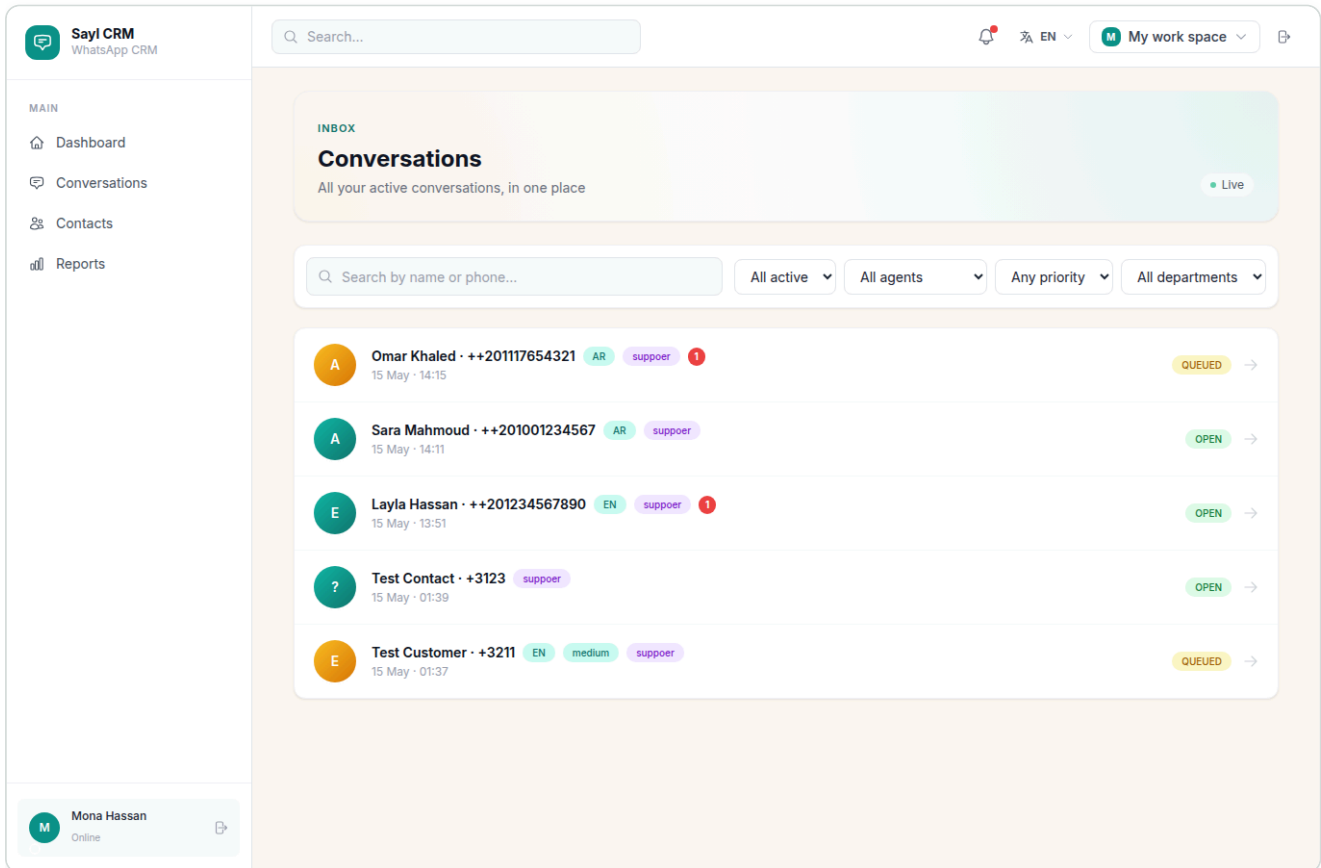
- 1 Email + password.** Use the credentials your workspace Owner set up for you. If you got an invitation email, click the link first — it lets you set a fresh password without anyone else seeing it.
- 2 If your account is locked,** wait 15 minutes. After 5 wrong passwords Sayl locks the account temporarily. Asking your manager to unlock is faster than waiting.
- 3 Multi-workspace?** If you work for more than one company on Sayl, you'll see a workspace selector. Pick one to work in. To switch later, click your avatar in the top-right.
- 4 Land in the inbox.** Sayl drops you straight into *Conversations*. That's your home page.

### **Always log out at the end of your shift.**

Online attendance only counts when your tab is open and connected — leaving it open at home means your "online time" report says you worked through the night. Click your avatar → *Logout* when you're done.

### 3. Your inbox at a glance

The Conversations page is where you'll spend most of your day. The layout has three regions: a left navigation, the conversation list in the middle, and (when you click a chat) the conversation view fills the rest of the screen.



The agent inbox — note the trimmed sidebar (*Dashboard, Conversations, Contacts, Reports*). *Settings pages and Team Attendance are hidden because they're not for agents.*

### The status pills you'll see

Pill	Means
QUEUED	Inbound conversation that hasn't been assigned to a specific agent yet. Click <i>Assign to me</i> to grab it.
OPEN	Active conversation, currently assigned. The default state for a chat in progress.
PENDING	You're waiting on the customer. Use this when you've replied and don't expect more from your side.
CLOSED	Conversation finished. It re-opens automatically if the customer messages again within 24 hours.

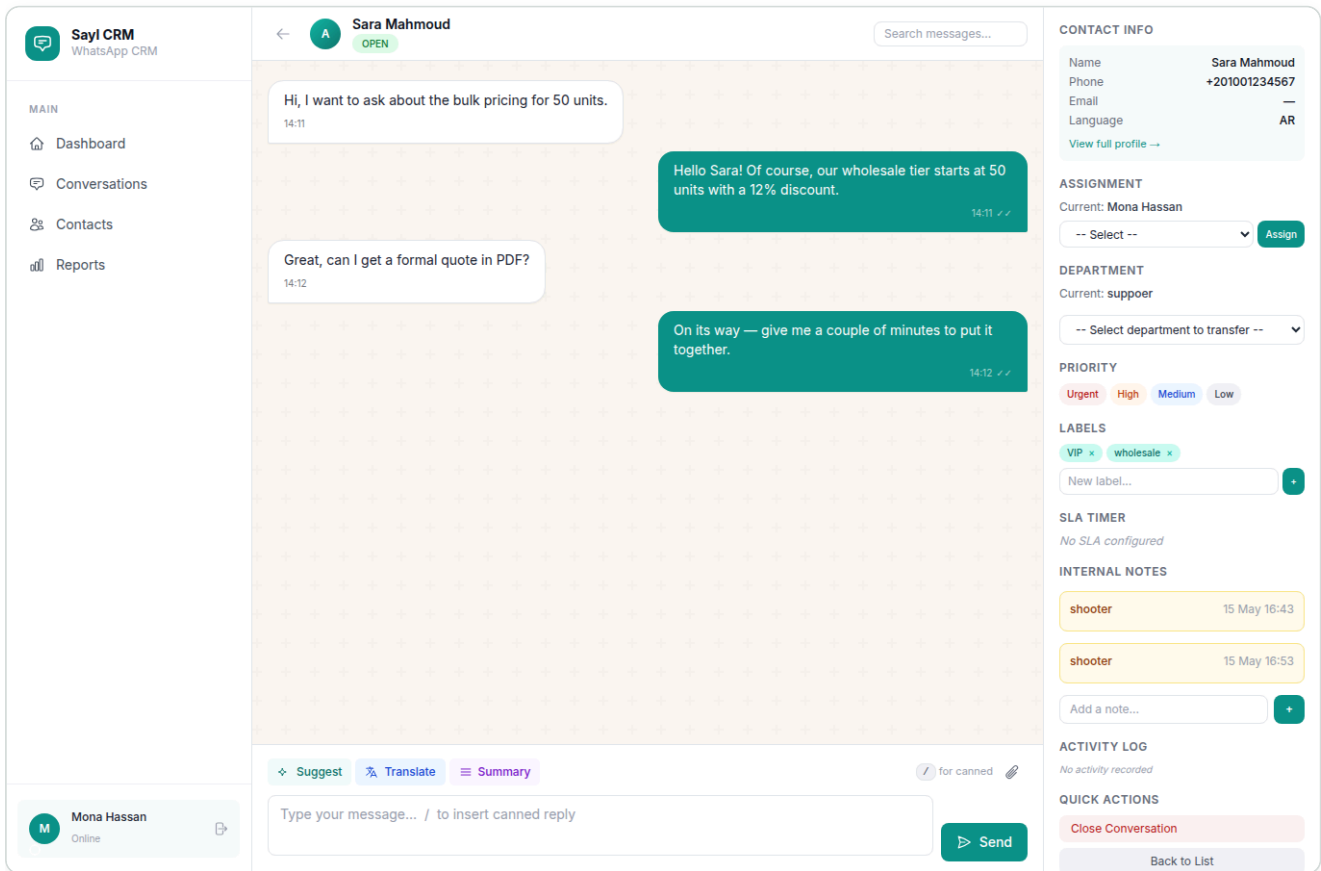
### Filters you'll actually use

- **All active / All agents / Any priority / All departments** — the four dropdowns above the list. Tighten them to focus on your own queue.

- **Search** — by name, phone, or any text in any message. Useful when a customer says "I asked about my order last week" and you need to find that conversation fast.
- **Language tags** ( **AR** , **EN** ) — show the conversation language so you don't open Arabic chats if you only speak English. Sayl already filters them out of *your* queue, but the filter helps when triaging.
- **Department tags** ( **support** , **sales** ) — show which team the line belongs to.
- **Unread badge** (red number) — count of new messages since you last opened the chat. *This is your priority signal.*

## 4. Inside a conversation — every button explained

Click any conversation to open the chat view. Here is the screen with everything labelled:



The chat view — message thread on the left, contact and action panel on the right with assignment, department, priority, labels, SLA timer, internal notes (two seeded here), activity log and quick actions all visible at once.


### The right-hand panel — top to bottom

Section	What it does
<b>Contact info</b>	Name, phone, email, language. <i>View full profile</i> → opens their full timeline across every channel.
<b>Assignment</b>	The "current owner" of the conversation. If it's <i>you</i> , you can reply directly. If it's a colleague, the composer is greyed out — click <i>Transfer</i> first if you need to take over.
<b>Department</b>	The team this line belongs to (e.g. <i>support</i> , <i>sales</i> ). Use the dropdown to send the conversation to a different department without re-assigning to a specific person.
<b>Priority</b>	Four pills: <b>Urgent</b> <b>High</b> <b>Medium</b> <b>Low</b> . Click one to mark the conversation. Managers see urgent breaches first; use it sparingly so it stays meaningful.
<b>Labels</b>	Free-form tags like <i>VIP</i> , <i>refund</i> , <i>callback</i> . Type to autocomplete from labels other agents have used. Filter inbox lists by label later.

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**SLA timer** Countdown to the inbox's first-response target. *No SLA configured* means the inbox doesn't track it. If you see the timer turning red, prioritise this chat.

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**Internal notes** Comments only your team sees. Use  to mention a colleague — they get a notification with a link straight back to the message.

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**Activity log** Audit trail for this conversation: who assigned, who escalated, who changed labels. Useful if a customer asks "who did I speak to last time?".

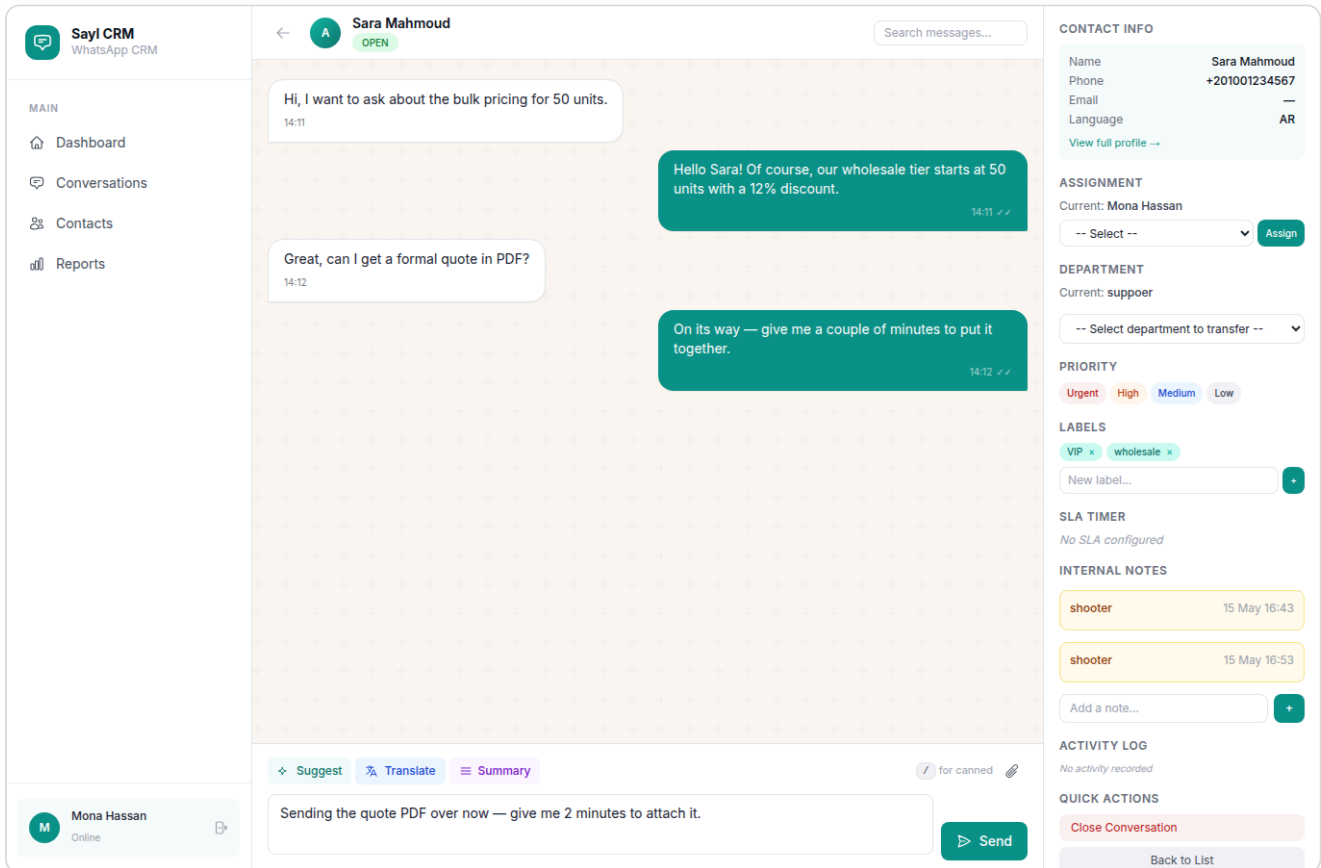
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**Quick actions** *Close Conversation* ends the chat. *Back to List* returns to the inbox.

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## 5. Replying — the composer, AI buttons & canned replies

The composer sits at the bottom of every chat. It's deliberately compact, but it has more in it than first meets the eye: three AI buttons, a canned-reply picker, and the textarea with the *Send* button.



The composer with a reply mid-typing. The action bar above the textarea has the AI buttons (*Suggest*, *Translate*, *Summary*), the `/` hint for canned replies, and an attachment placeholder. `Enter` sends; `Shift` + `Enter` inserts a line break.

### The basics

- 1 Click the **conversation** you want to reply to. The composer only lights up if the chat is assigned to you.
- 2 **Type your reply** in the textarea at the bottom of the screen.
- 3 `Enter` sends; `Shift` + `Enter` inserts a new line for a paragraph break.
- 4 Watch the **delivery indicators** below your message — 🕒 *Sent*, ✓ *Delivered*, ✓✓ *Read* for WhatsApp/SMS.

### The action bar — three AI buttons

Button	What it does	When to reach for it
<b>Suggest</b> Active	Asks the workspace's AI to draft <i>three</i> reply options in the conversation language. They appear in a panel above the	You know what to say but want a faster start. The AI sees the last few

textarea — one click drops the chosen one into the composer, where you can edit before sending.

messages, so the suggestions follow the thread's tone.

### Translate

Active

Translates the customer's last inbound message into your interface language (Arabic ⇌ English). The translation appears below the action bar without modifying the original message in the thread.

The customer wrote in a language you don't read fluently — confirm what they're asking before replying.

### Summary

Active

Pops up a one-paragraph summary of the conversation so far.

You inherited a long thread on a transfer. Get the gist in 5 seconds instead of scrolling.

The screenshot displays the Sayl CRM WhatsApp interface. On the left is a sidebar with navigation options: Dashboard, Conversations, Contacts, and Reports. The main chat area shows a conversation with Sara Mahmoud. The messages are: "Hi, I want to ask about the bulk pricing for 50 units." (14:11), "Hello Sara! Of course, our wholesale tier starts at 50 units with a 12% discount." (14:11), "Great, can I get a formal quote in PDF?" (14:12), and "On its way — give me a couple of minutes to put it together." (14:12). Below the messages is a "REPLY SUGGESTIONS" section with three suggestions: "Hi Sara! Yes — for 50 units the wholesale tier price is EGP 4,500 with the 12% discount applied. Shall I send the formal quote?", "Hi Sara — confirming wholesale at 50 units. Total: EGP 4,500 (12% discount). Ready to send the PDF whenever you are.", and "Sara, our 50-unit pricing is EGP 4,500 incl. 12% wholesale discount. Want me to lock it in and ship the quote PDF now?". At the bottom of the chat area are buttons for "Suggest", "Translate", and "Summary". The right-hand panel contains "CONTACT INFO" (Name: Sara Mahmoud, Phone: +201001234567, Email: —, Language: AR), "ASSIGNMENT" (Current: Mona Hassan), "DEPARTMENT" (Current: suppoer), "PRIORITY" (Urgent, High, Medium, Low), "LABELS" (VIP, wholesale), "SLA TIMER" (No SLA configured), "INTERNAL NOTES" (shooter, 15 May 16:43; shooter, 15 May 16:53), "ACTIVITY LOG" (No activity recorded), and "QUICK ACTIONS" (Close Conversation, Back to List).

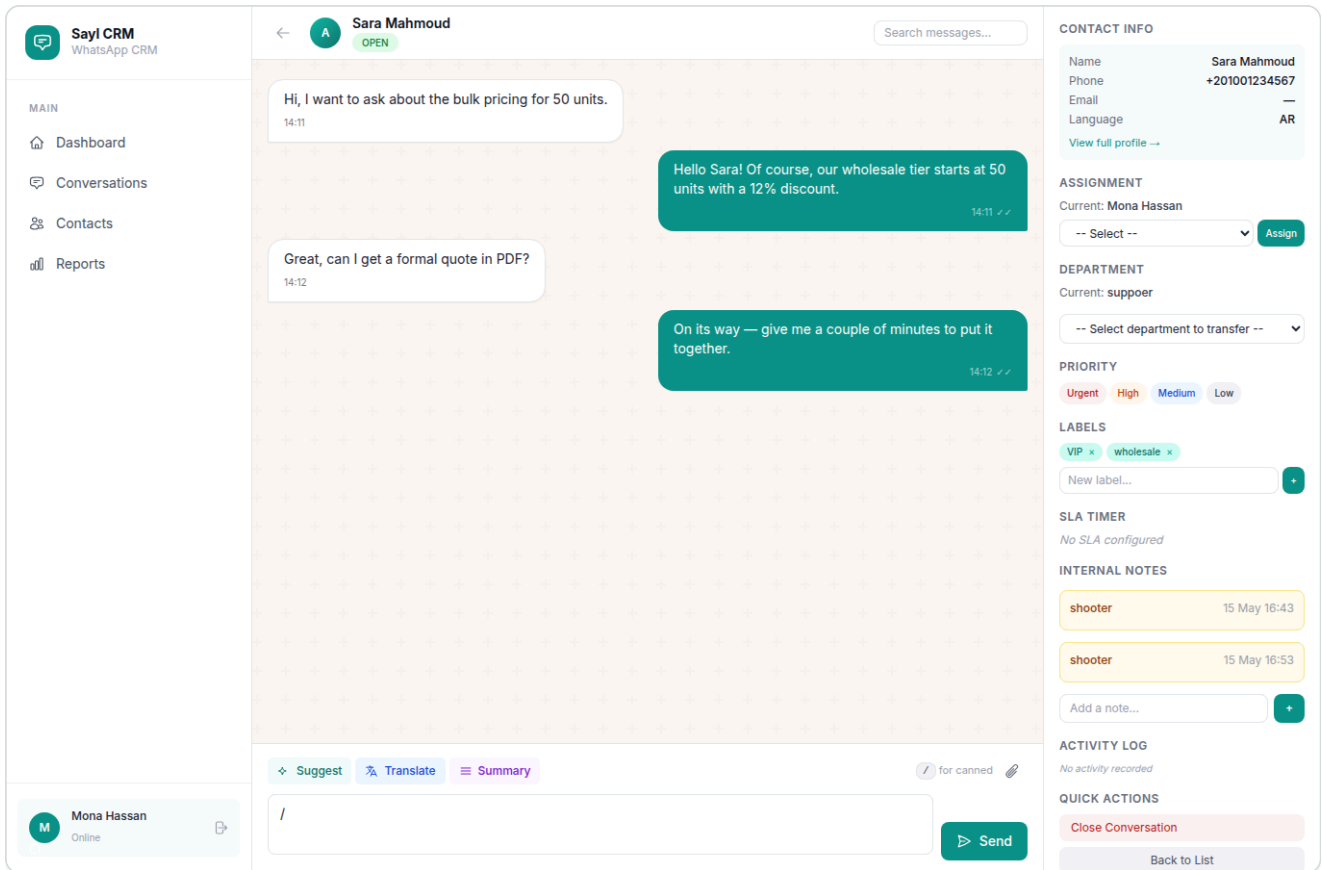
The Suggest button populated three reply suggestions for a wholesale-pricing question. Click any to drop it into the composer; click Dismiss to clear them.

### If a button alerts "AI service unavailable" or "budget exhausted"

the workspace's AI provider is misconfigured or the monthly token budget is spent. Tell your Owner — only they can fix it from *Settings* → *AI*. The composer stays usable; you just type without the AI helper.

### Canned replies — the / shortcut

Workspaces can save common replies (greetings, return-policy boilerplate, after-hours messages) under *Settings* → *Team* → *Canned Replies*. Agents pick them with the slash key.



Type `/` at the start of the composer to open the canned-reply picker; keep typing to filter by short-code. `↑` / `↓` navigates, `Enter` inserts. `Esc` closes the picker without inserting.

- 1 **Place the cursor at the start** of the textarea (or on a fresh new line).
- 2 **Type `/`** — the picker opens automatically.
- 3 **Type a few letters** of the short-code or any word from the canned text — the list filters live.
- 4 **Press `Enter`** on the highlighted entry to insert. Edit before sending if you want.

### No canned replies yet?

The picker shows a *"No canned replies — create one in Settings"* empty state. Ask your Owner or Manager to add a few common ones; they're the biggest single time-saver in the inbox.

## Two states the composer can be in

State	What you see	Why
Assigned to you	Active textarea, AI buttons, canned-reply picker, <i>Send</i> button.	The conversation is yours to handle. Type and send.

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<i>Unassigned (or assigned to someone else)</i>	The composer is replaced by an "Assign to me" prompt.	Sayl prevents two agents from racing to reply. Click the prompt to take ownership, then type as usual.
<i>Closed conversation</i>	"Conversation closed" message; no composer.	You can't reply to a closed thread. The customer's next message will re-open it automatically; until then, use the contact card if you need to make a note.

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## Voice notes from customers

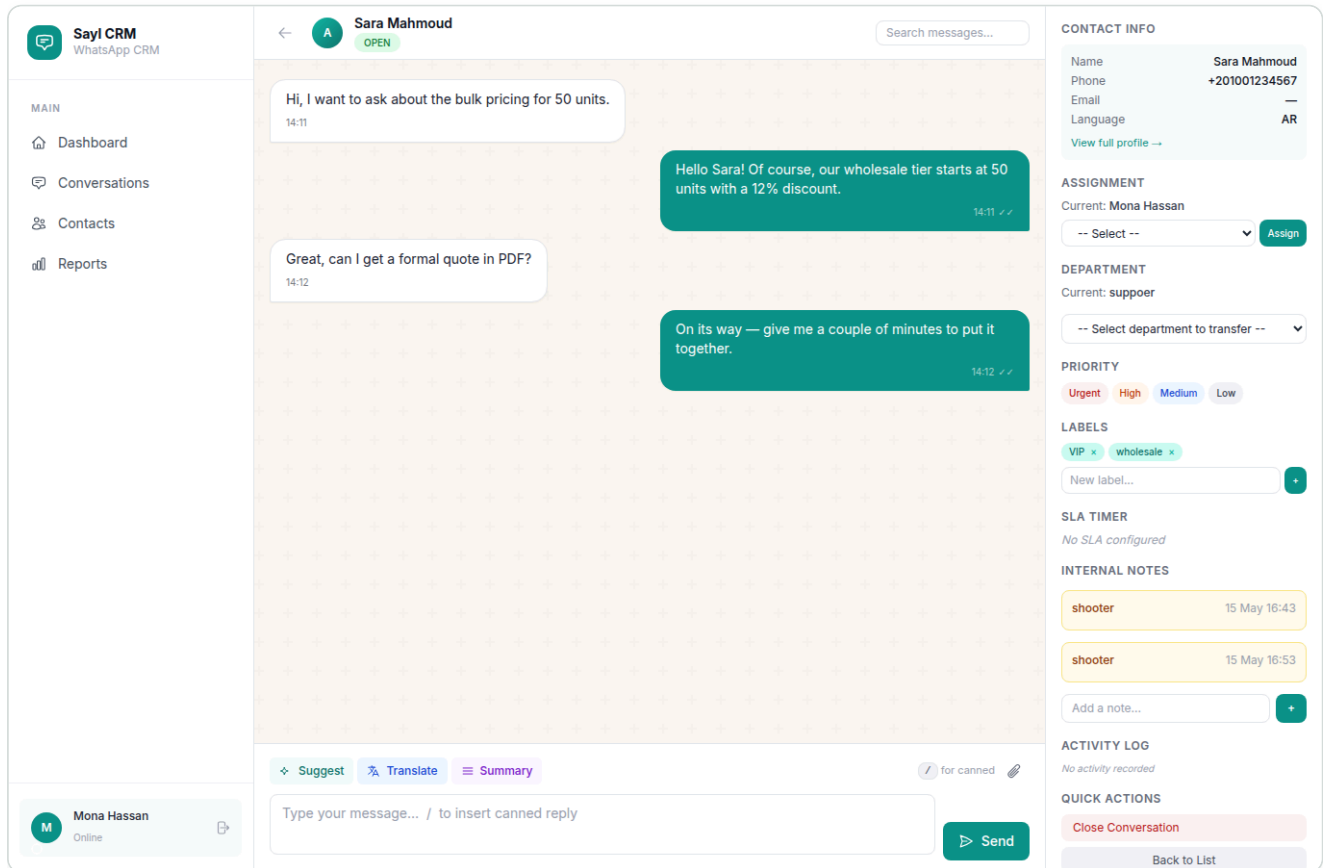
WhatsApp voice messages appear in the thread with a play button. If your workspace has the AI integration configured, a transcript also appears below — usually faster to read than to listen. Audio is processed in memory and never written to disk; the transcript is the canonical record.

### About attachments.

The paper-clip button is a placeholder. Sending files / images from the agent composer is not yet wired in — clicking it shows *"Attachments — coming with the next release"*. To send a file *today*, ask your Owner / Manager to use a broadcast template, or wait for the next release.

## 6. Internal notes & @mentions

An *internal note* is a comment only your team can see. The customer never receives it. Notes live in the right-hand panel of the chat view, below labels and the SLA timer. Each note shows the author's name and the time it was written.



*Internal Notes panel populated with two notes from the agent shooter. The text input below it is where you add your own. Notes are private to the team — never sent to the customer.*


### Adding a note

- 1 Locate the *Internal Notes* panel on the right side of the chat view.
- 2 Type your note in the *Add a note...* input.
- 3 Click the + button (or press `Enter`) to save. The note appears at the top of the list with your name and the timestamp.

Use notes to:

- Brief a colleague before transferring ("VIP customer, refund already approved").
- Record context for your future self ("customer called from a different number last month").
- Capture a one-line summary at the end of a long thread so the next person sees the outcome at a glance.

### @mentioning a colleague

Mention a teammate by typing  followed by their name in the note text. They get a bell-icon notification with a deep-link to the conversation, and an email summary if they're not online. Their name is highlighted in the note for everyone else who reads it.

**Notes never leave the platform — but treat them as if they could.**

Don't write anything in a note that you wouldn't want a regulator to read. They're part of the audit log, retained for 90 days, and exportable.

## 7. Escalation, transfer, close

Three different ways to move a conversation forward when you can't (or shouldn't) handle it alone.

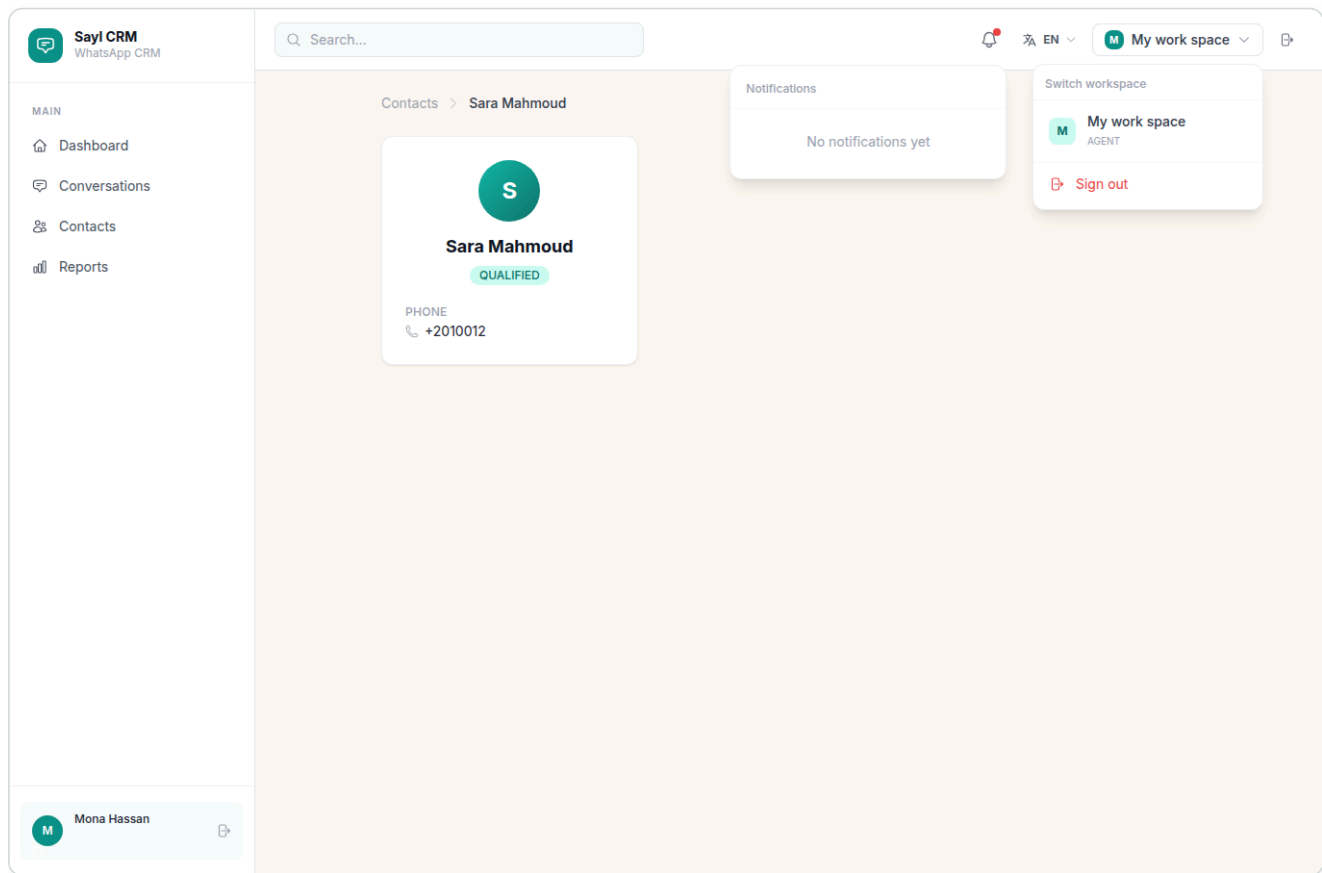
Action	Use when...	What happens
<b>Escalate</b>	You need a manager's eyes on it (complaint, refund, VIP issue).	Conversation flag raised. You stay on the chat, but every Manager / Owner gets a real-time alert. They can step in or just review.
<b>Transfer</b>	The conversation belongs to a different agent or department.	Conversation is reassigned. The receiving agent gets a notification; you no longer see it in <i>Mine</i> . Internal notes you wrote are preserved as context.
<b>Close</b>	The customer's question is answered.	Conversation ends. CSAT (if configured) is sent to the customer for one final reply. If they message again within 24 h, the conversation re-opens automatically.

### The workflow most experienced agents follow:

1. Take a queued conversation with *Assign to me*.
2. If it's a tricky one, leave an internal note with what you tried.
3. If you can't fix it, escalate (manager intervenes) *or* transfer (colleague takes over).
4. If you can fix it, reply, confirm with the customer, then close.

## 8. The contact panel — knowing who you're talking to

Click *View full profile* on the contact info card to open the contact's profile page.



The contact card — name, pipeline stage, phone, tags and any deals associated. Add a tag with the + button; the rest is read-only for agents.

Field	Where it comes from	What it tells you
<b>Name</b>	Auto-set from the channel (WhatsApp display name, email From header). Editable.	How to greet them.
<b>Pipeline stage</b>	The Owner / Manager set this; agents can't usually change it.	How committed they are to buying. <b>LEAD</b> means brand new; <b>PROPOSAL</b> means they've seen a quote; <b>WON</b> means they're a customer.
<b>Phone / email</b>	From the channel.	How to reach them on a different channel.
<b>Tags</b>	Anyone with the right permission can add. Free-form text.	Behavioural shorthand. <i>VIP, callback, do-not-call</i> .
<b>Deals</b>	Linked sales records.	Open opportunities with this contact and their values.

## **Why bother filling this in?**

Because the next person on this chat is going to thank you. If you tag a customer as *VIP*, mark them as *QUALIFIED*, or note that they prefer Arabic, you save your colleague twenty minutes of guesswork.

## 9. Working with the contacts list

The Contacts tab is the read view of everyone you've ever interacted with.

The screenshot displays the Sayl CRM interface. On the left is a sidebar with a 'MAIN' section containing 'Dashboard', 'Conversations', 'Contacts', and 'Reports'. The top navigation bar includes the Sayl CRM logo, a search bar, a language selector (EN), and a workspace selector ('My work space'). The main content area is titled 'CRM Contacts' and includes a '+ Add Contact' button. Below this is a table of 'All Contacts' with 7 entries. The table columns are NAME, PHONE, EMAIL, STAGE, and TAGS. Each row includes a 'View →' link. At the bottom of the main content area is an 'Add New Contact' button with the text 'Enter new customer details'.

NAME	PHONE	EMAIL	STAGE	TAGS	
S Sara Mahmoud	+201001234567		QUALIFIED	VIP wholesale	View →
O Omar Khaled	+201117654321		PROPOSAL	new	View →
L Layla Hassan	+201234567890		LEAD	Instagram-ad	View →
A Ahmed Farouk	+201556789012		WON	repeat VIP	View →
N Nour Adel	+201998765432		LEAD		View →
T Test Contact	3123		LEAD		View →
T Test Customer	3211		LEAD		View →

Contacts list — name, phone, email, pipeline stage, tags. Click View → on any row to open the full profile.

### What you can do here

- **Search** by name or phone using the field at the top.
- **Filter** by pipeline stage or tag.
- **Open a contact** to see all their past conversations across every channel.
- **Add a new contact manually** — useful for outbound calls where the customer doesn't yet have a Sayl record. Click + *Add Contact*.

#### One contact, every channel.

If a customer messaged you on WhatsApp last month and emailed today, both conversations appear under the same contact. You don't have to remember "did I help them before?" — Sayl already knows.

## 10. AI assist — what's available today

The AI integration is wired into the chat view as three composer buttons (covered in section 5) and two background jobs that you don't have to invoke. Every feature uses the workspace's own AI provider configured under *Settings* → *AI* (BYOAI: OpenAI / Anthropic / Gemini / Azure OpenAI), with a platform fallback when the workspace key isn't set.

Feature	Status	How you experience it
<b>Reply suggestions</b>	Active	<i>Suggest</i> button in the composer. Returns 3 options in the conversation language. Click one to drop into the textarea and edit before sending.
<b>Translation</b>	Active	<i>Translate</i> button. Translates the customer's last inbound message into your interface language so you can confirm what they're asking before replying.
<b>Conversation summary</b>	Active	<i>Summary</i> button. Pops up a one-paragraph recap of the thread — useful when you inherit a long conversation on a transfer.
<b>Voice transcription</b>	Active	WhatsApp voice notes show with a transcript below the play button. Read instead of listen. No button needed — it just runs.
<b>Sentiment</b>	Active	Each inbound message is scored in the background; managers see the aggregate in reports. Look for negative-trend conversations to prioritise.

### The honest fallback story.

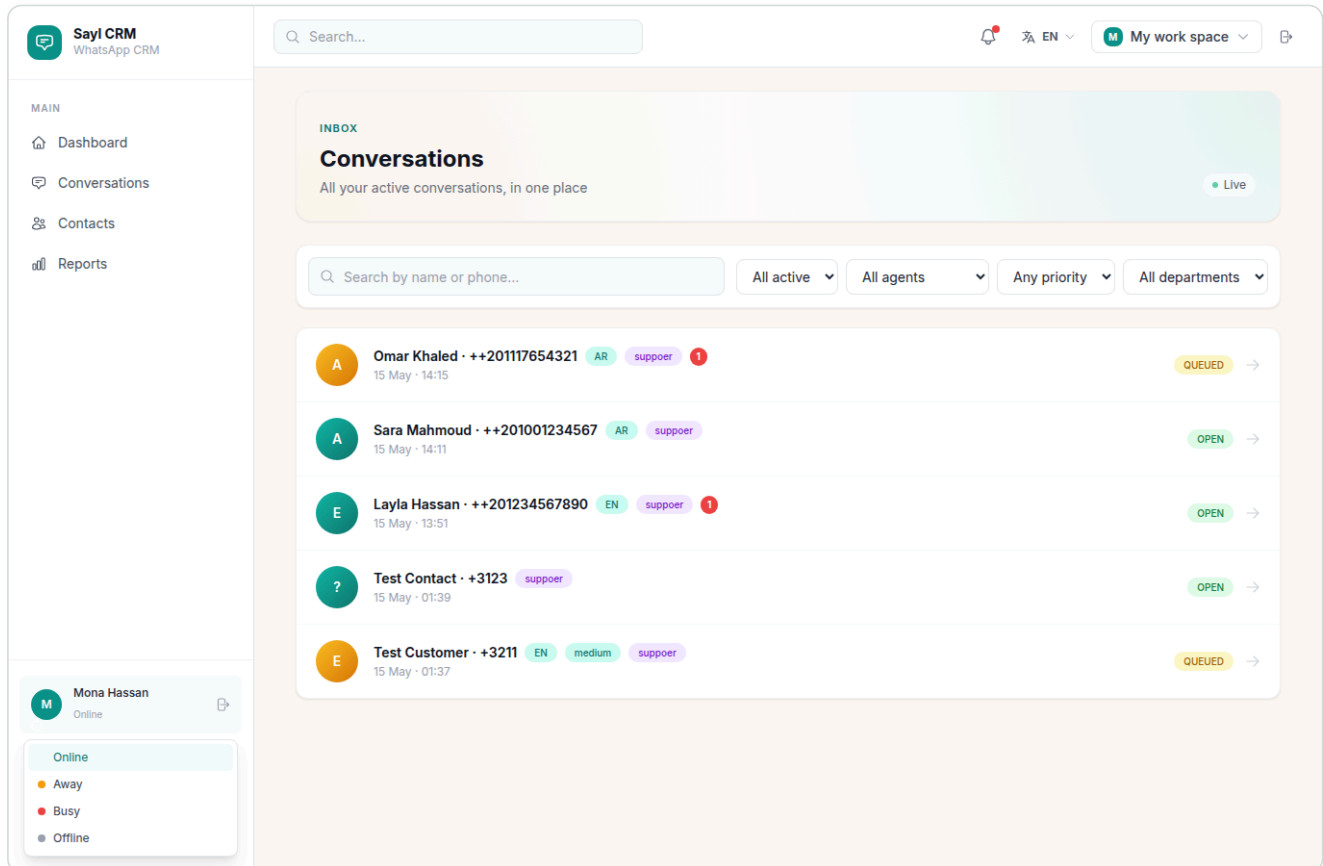
Every AI button can fail with *"AI service unavailable"* or *"budget exhausted"*. That means the workspace key is misconfigured or the monthly token budget is spent. The composer keeps working without AI — type as normal, and tell your Owner so they can refill the budget or fix the key. Sayl never silently sends fake AI output.

### What you say to AI is logged.





The conversation text and your prompts are sent to the configured provider (OpenAI / Anthropic / Azure / Gemini). Their privacy terms apply. Don't paste secrets, full credit-card numbers, or anything you wouldn't put in a customer-facing reply.

## 11. Setting your status (Online / Away / Busy / Offline)

Sayl shows your current status to managers and uses it to decide whether to auto-assign you new conversations. The picker lives in the bottom-left corner of the sidebar — click your name to open it.



Status picker open. The coloured dot on your avatar reflects your current state. Pick Online to receive auto-assigned chats; Away, Busy or Offline to pause assignments.

Status	Dot	What it means	Auto-assignment?
Online		You're working and ready for new conversations.	Yes
Away		Short break, lunch, away from the keyboard.	No (your existing chats stay yours)
Busy		On a call, in a meeting — don't pile new chats on me right now.	No
Offline		End of shift. Logged out or stepping away for the day.	No

### How it interacts with attendance tracking

- **Opening the inbox flips you from *Offline* to *Online* automatically.** Sayl assumes that if you've loaded a workspace page, you're back at work.
- **Closing the tab marks you *Offline* within a few minutes** (the live event connection times out).

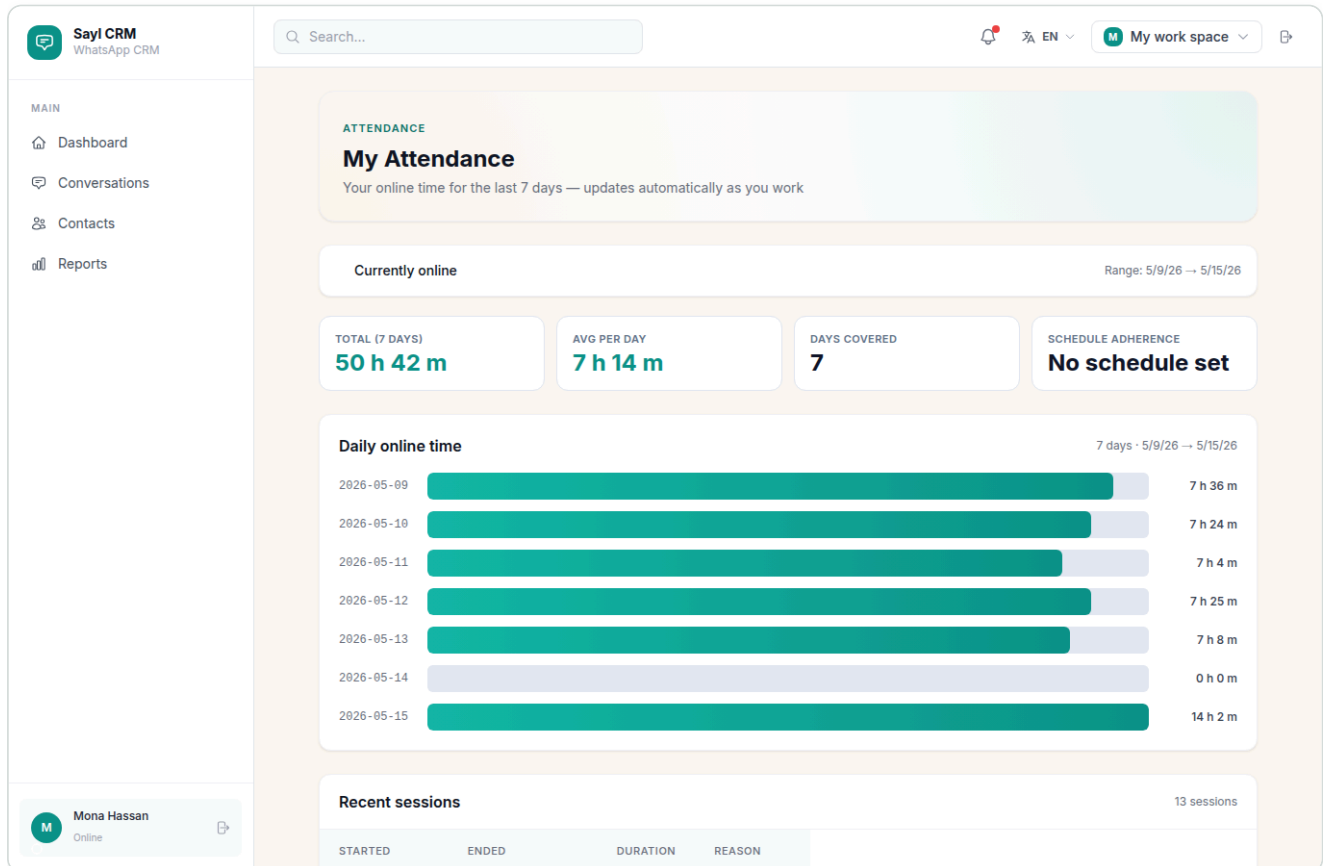
- **Setting yourself to *Away* or *Busy* still counts as online time** for the attendance report. The report measures presence, not productivity — your status is a courtesy signal to your colleagues.

**Always log out at the end of your shift.**

Online attendance only stops when the SSE connection drops. Leaving the tab open on your home computer means the report says you worked through the night, and your manager will ask awkward questions. Setting yourself *Offline* doesn't drop the connection — actual logout (avatar → *Logout*) does.

## 12. My Attendance — your own hours

The *My Attendance* page ( `/agent/attendance` ) is the self-service view of your last 7 days of online time. There's no link in the sidebar today — bookmark the URL or paste it into the address bar.



The agent's self-service attendance page — total online time, daily average, days covered, schedule adherence (if your manager set a schedule), and a per-day bar chart of online seconds.

### What the tiles mean

Tile	Reads
<b>Total (7 days)</b>	Your cumulative online time across the last week.
<b>Avg per day</b>	Total divided by days covered. Useful for sanity-checking against your scheduled hours.
<b>Days covered</b>	How many of the last 7 days had at least one session. 5 is normal for a 5-day work week.
<b>Schedule adherence</b>	What % of your scheduled hours you were actually online. Empty if your manager hasn't configured a schedule.

### The per-day chart and recent sessions

The bar chart shows online seconds per day for the last 7 days. The bar caps at "100%" of an 8-hour reference day, so a day where you worked 14 h shows a full bar (the right-hand label gives the exact number). Below the chart,

*Recent sessions* lists every individual session with start, end, duration and the close reason (logout, tab closed, idle timeout).

**Tracking starts automatically when you open the inbox.**

You don't clock in. Loading any workspace page starts a session; closing the tab or being idle long enough ends it. A new session is created at the start of each day, even if you never logged out — that's why a single "didn't log out" laptop produces 24h sessions in this list.

## 13. Keyboard shortcuts

Key	Action
<code>?</code>	Show all shortcuts on the current page.
<code>Ctrl + K</code>	Global search — name, phone, message text.
<code>j</code> / <code>k</code>	Next / previous conversation in the list.
<code>Enter</code>	Send the message in the composer.
<code>Shift + Enter</code>	New line in the composer (without sending).
<code>e</code>	Close the active conversation.
<code>r</code>	Re-open the most recently closed conversation.
<code>Esc</code>	Close any open dropdown / picker.

**Learn three keys and you'll be 30% faster.**

`j` / `k` to walk the queue, `Enter` / `Shift + Enter` in the composer, `e` to close. That's the 80/20.

## 14. FAQ for new agents

Question	Answer
I don't see any conversations. Am I broken?	Probably not. Either nobody has messaged you yet, or you're not a member of the inbox the messages are going to. Ask your manager to check inbox membership in <i>Settings</i> → <i>Team</i> .
A conversation appeared in my queue but I don't speak that language.	Sayl skips agents whose language list doesn't match — but only if your language preferences are set correctly. Click your avatar → check the language preference. Update if needed and the next conversations will route correctly.
The customer sent a voice note. Can I reply with a voice note?	Not yet. The composer is text-only today (the paper-clip is a placeholder). Reply in text — the customer's transcript appears under their voice note so you don't have to listen.
The <i>Suggest / Translate / Summary</i> buttons say "AI service unavailable".	Your workspace's AI provider is misconfigured or the monthly token budget is spent. Tell your Owner — only they can fix it from <i>Settings</i> → <i>AI</i> . The composer keeps working without AI; just type as usual.
How do I add a canned reply?	You can't — only Owners and Managers can. Ask them to add common ones in <i>Settings</i> → <i>Team</i> → <i>Canned Replies</i> . Once they exist, type <input type="text" value="/"/> at the start of your message to pick one.
I closed a conversation by mistake. Can I undo?	Yes — open the conversation list, switch the status filter to <i>Closed</i> , find the chat, click in, and use the <i>Re-open</i> button. Or hit <input type="text" value="r"/> right after closing.
The customer replied to a closed conversation. Where did the message go?	The conversation re-opened automatically. Check your <i>Open</i> filter — it'll be back at the top.
How do I know if my reply was actually delivered?	Look at the small status icons under each outgoing message: 🕒 <i>Sent</i> , ✓ <i>Delivered to phone</i> , ✓✓ <i>Read by customer</i> . WhatsApp and SMS are honest about this.
The composer is greyed out. Why can't I type?	The conversation isn't assigned to you. Either click <i>Assign to me</i> at the bottom of the thread, or leave an internal note instead.
I want to take a 15-min break. Should I log out?	Set your status to <i>Away</i> or <i>Busy</i> instead — it stops auto-assignment but keeps you on existing chats. Logging out drops the SSE connection and ends the attendance session.
How do I see my own hours?	Open <code>/agent/attendance</code> in your browser. There's no sidebar link yet — bookmark it. Last 7 days, daily breakdown, recent sessions.
My manager said I have to enable SLA. How?	You don't — that's a Manager / Owner setting under <i>Settings</i> → <i>SLA</i> . Once they configure it, the timer appears in your right-hand panel automatically.
I think I'm in the wrong workspace.	Click your avatar in the top-right; you'll see a workspace switcher if you belong to more than one.

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I forgot my password.

Click *Forgot password* on the login page. Sayl emails you a one-time reset link valid for an hour. After 5 wrong attempts your account locks for 15 minutes.

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Most of the job is the same as good customer service anywhere — be quick, be polite, be honest. Sayl just gives you the tools to be faster than you would be in WhatsApp on your phone.