USER GUIDE

Sayl CRM

WhatsApp customer relationship management,
built for the way your team actually works.

Version 1.0 · A practical walkthrough for owners, managers and agents

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1. What Sayl CRM does (and why it's different)

Sayl CRM brings every customer conversation into one inbox, with the people who handle them, the tools they need to reply quickly, and the reports that show how the team is performing.

The platform is built around four ideas:

- **One inbox, many channels.** WhatsApp is at the centre, with Telegram, web chat, SMS, email and Facebook/Instagram messaging plugged into the same conversation view.
- **Conversations belong to people, not channels.** Every contact has a single timeline, no matter how they reached you.
- **Routing happens automatically.** Incoming messages are assigned to the right agent — by language, workload and inbox membership — without anyone clicking a button.
- **Bilingual by default.** Arabic (right-to-left) and English are first-class. Customers see the language they expect, and the interface follows whichever language each user picks.

What's included

Area	Capability
Channels	WhatsApp Cloud API, Telegram, Web Chat widget, SMS (Twilio), Email (IMAP/SMTP), Facebook Messenger, Instagram DMs.
Inbox	Auto-assignment, real-time updates, internal notes with @mentions, escalation flag, close/re-open, SLA timers, priority & department transfer.
Contacts	Auto-created from inbound messages, tags, pipeline stages (Lead → Qualified → Proposal → Won / Lost), bulk import / export.
Broadcasts	Send pre-approved WhatsApp templates to filtered audiences with live delivery stats and 80 msg/s rate limit.
Bot flows	Decision-tree replies for first message, keyword match, outside business hours and "no agent available".
AI assistant	Reply suggestions, translation, voice transcription, sentiment, conversation summary — Bring-Your-Own-Key supported.
Reports	Per-agent performance, SLA, CSAT, team attendance, online/offline tracking with 7-day rolling totals.
Integrations	HMAC-signed outgoing webhooks for downstream systems, REST & SSE for real-time UI.
Security	AES-256-GCM at rest for tokens / AI keys, 90-day audit log, brute-force lockout, signed webhooks, HSTS / CSP / frame-deny headers.

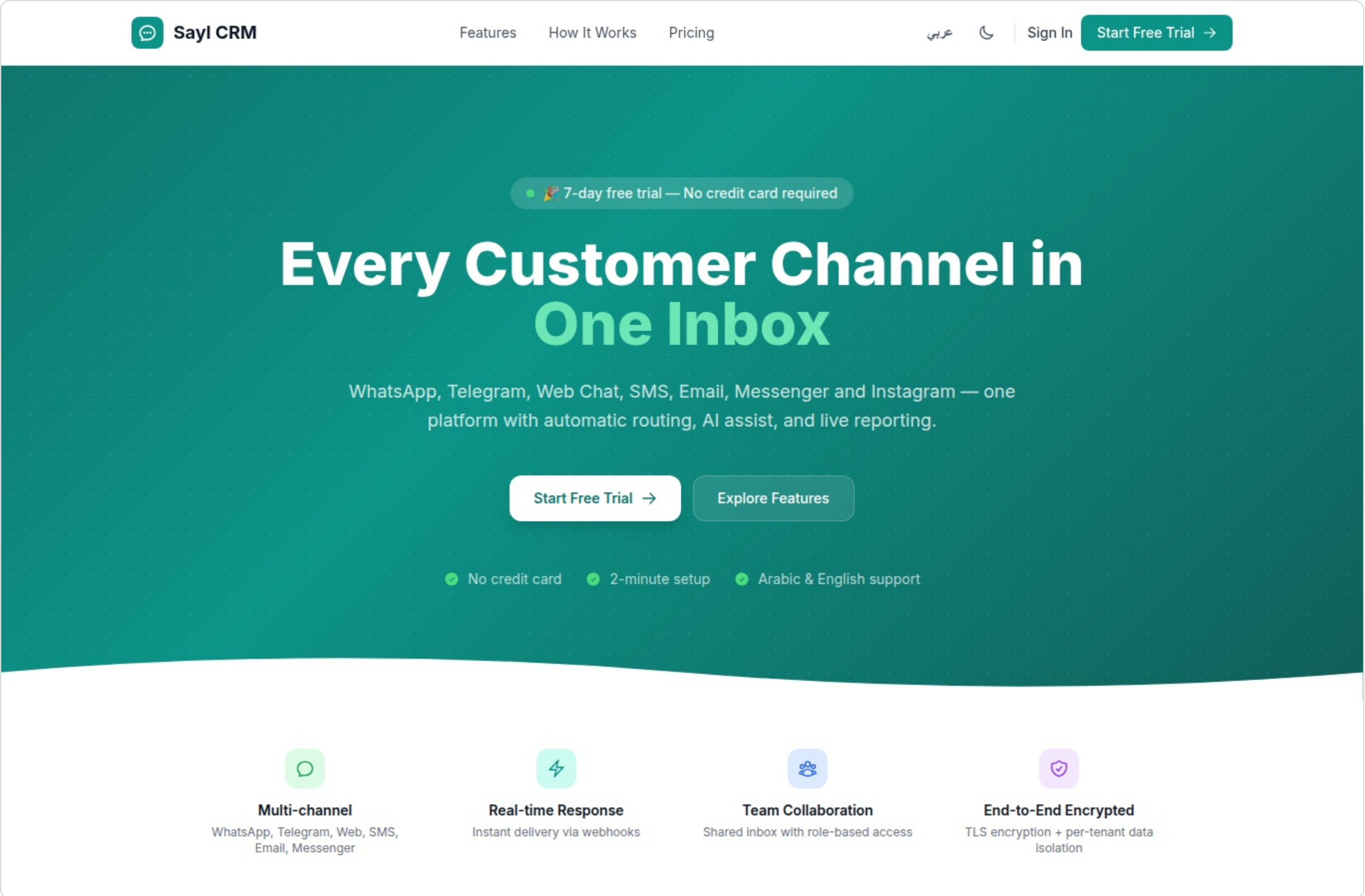
Why teams pick Sayl over the alternatives

Advantage	What it means in practice
Built for Arabic first	RTL is the primary layout, not an afterthought. PDFs render Arabic with the bundled Noto Naskh font; Egyptian payment methods (Instapay, Vodafone Cash) are first-class — no separate billing flow for the local market.
Bring-your-own-AI	Plug in your own OpenAI / Anthropic / Gemini / Azure key and pay your provider directly. No surprise per-message AI charges from a vendor's reseller mark-up.
Tenant-isolated by design	Every database query is scoped by workspace. Cross-tenant data leakage is impossible at the data layer, not just the UI — verified by the platform's automated tenant-isolation test suite.
Real-time without polling	SSE streams keep agent inboxes, supervisor dashboards and broadcast counters live. No "press F5 to see new messages".
One contact, every channel	If a customer messages you on WhatsApp today and emails you tomorrow, an agent sees one timeline — not two unrelated conversations.
Granular permissions	Roles set the defaults; per-member overrides let you grant a specific agent the ability to (e.g.) export contacts without giving them broadcast access.
Self-host or managed	Spring Boot & MongoDB — runs anywhere a JVM and Mongo run, including air-gapped environments where you can't use a SaaS-only competitor.

> **Roles at a glance**
> Owner sets up the workspace, billing and channels. Manager oversees the team, assigns inboxes and reads reports. Agent replies to conversations.

2. First-time setup & the workspace

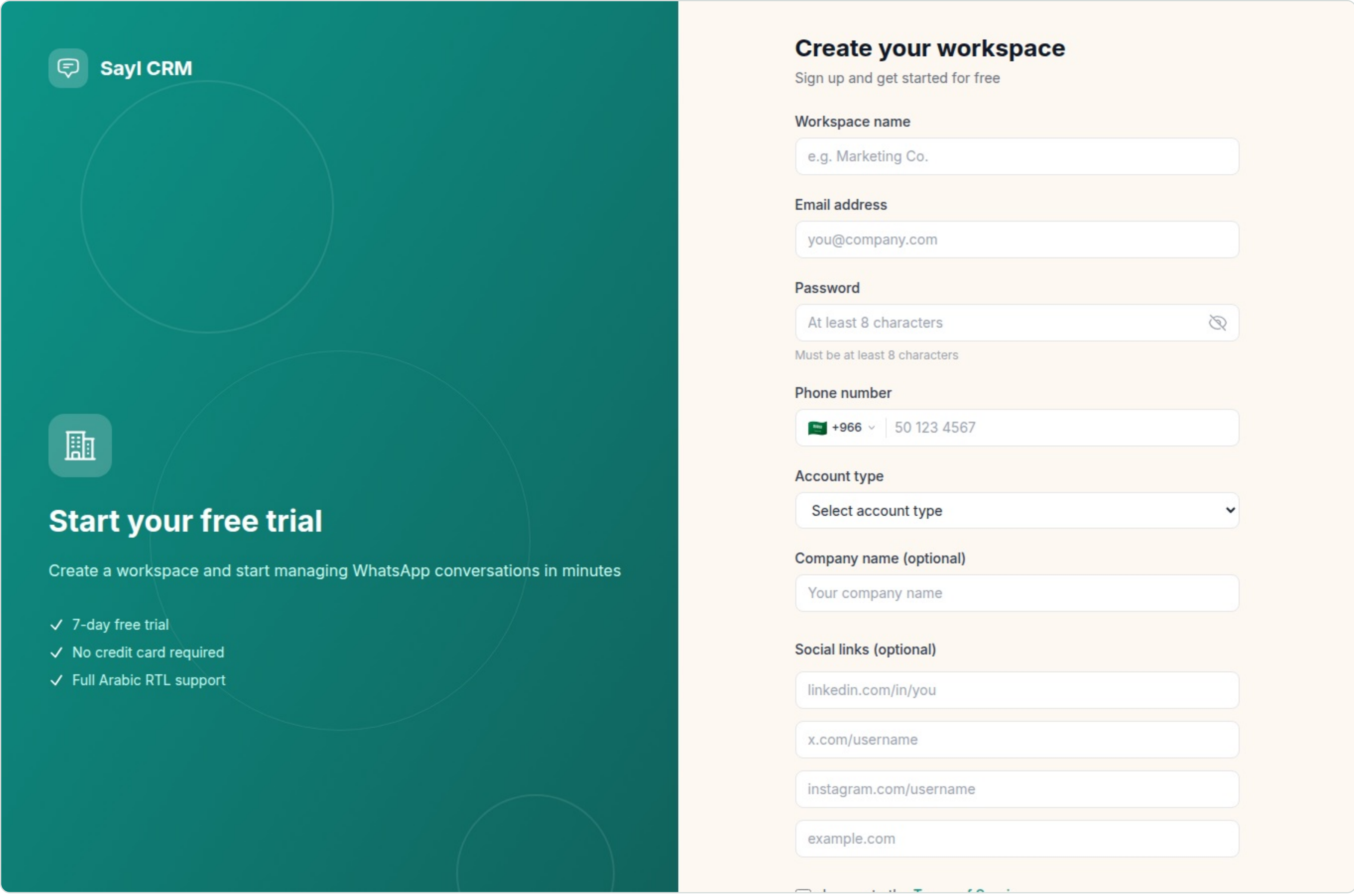
This is what an Owner does the very first time they sign in. The whole flow takes about 10 minutes if you have your channel credentials ready.



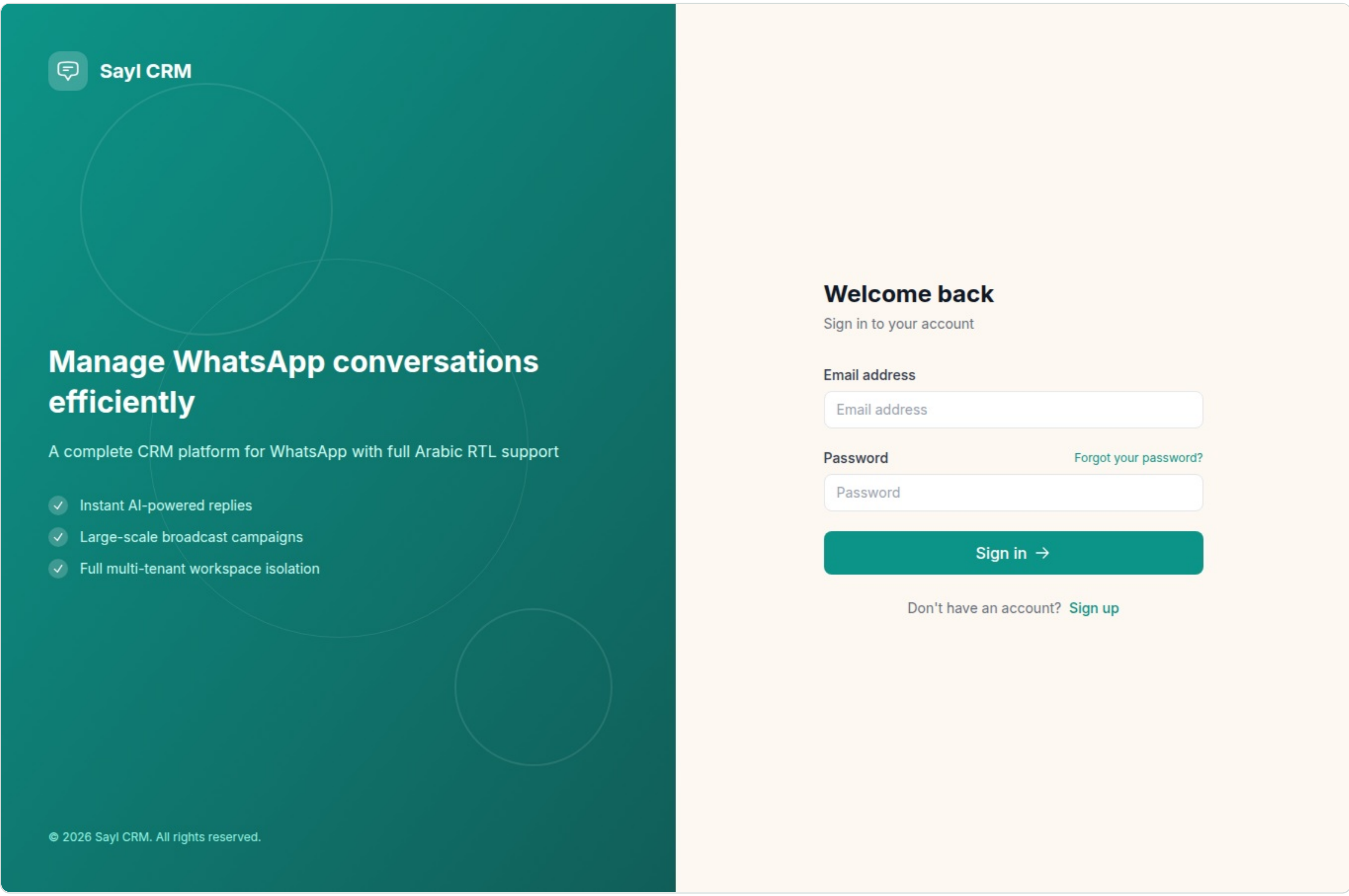
The Sayl CRM landing page — click Get Started to register.

Step-by-step

1. **Register your workspace.** Open the login page, click *Register*, and fill in your company name, email and phone number. Phone uses E.164 format (e.g. `+201001234567`).
2. **Verify your contact details.** A six-digit code is sent to your email and a second one to your phone. Both expire in 10 minutes — request a fresh one if needed. The system rate-limits OTP requests to prevent abuse.
3. **Set your password.** Choose at least 8 characters with a mix of letters and numbers. After 5 failed login attempts the account is locked for 15 minutes — the lockout survives a server restart, so brute-force attempts are persistently blocked.
4. **Create your first inbox.** An inbox is a group of channels and agents — for example "Sales", "Support" or "Egypt — Arabic". Go to *Settings* → *Inboxes* and click *New Inbox*. Choose *Dedicated* (one team, one inbox) or *Shared* (multiple agents pool the load). Set the default language so language-aware routing knows which agents to skip.
5. **Connect a channel.** Inside the inbox, choose *WhatsApp* (or any other channel) and follow the on-screen steps. See section 3 for the per-channel walkthrough.
6. **Invite your team.** Go to *Settings* → *Team* and invite agents by email. Each invitation is a one-time, opaque token valid for 7 days. The invitee gets a link to set their password — your password never leaves their browser.



The registration form — workspace name, email, phone with OTP verification.

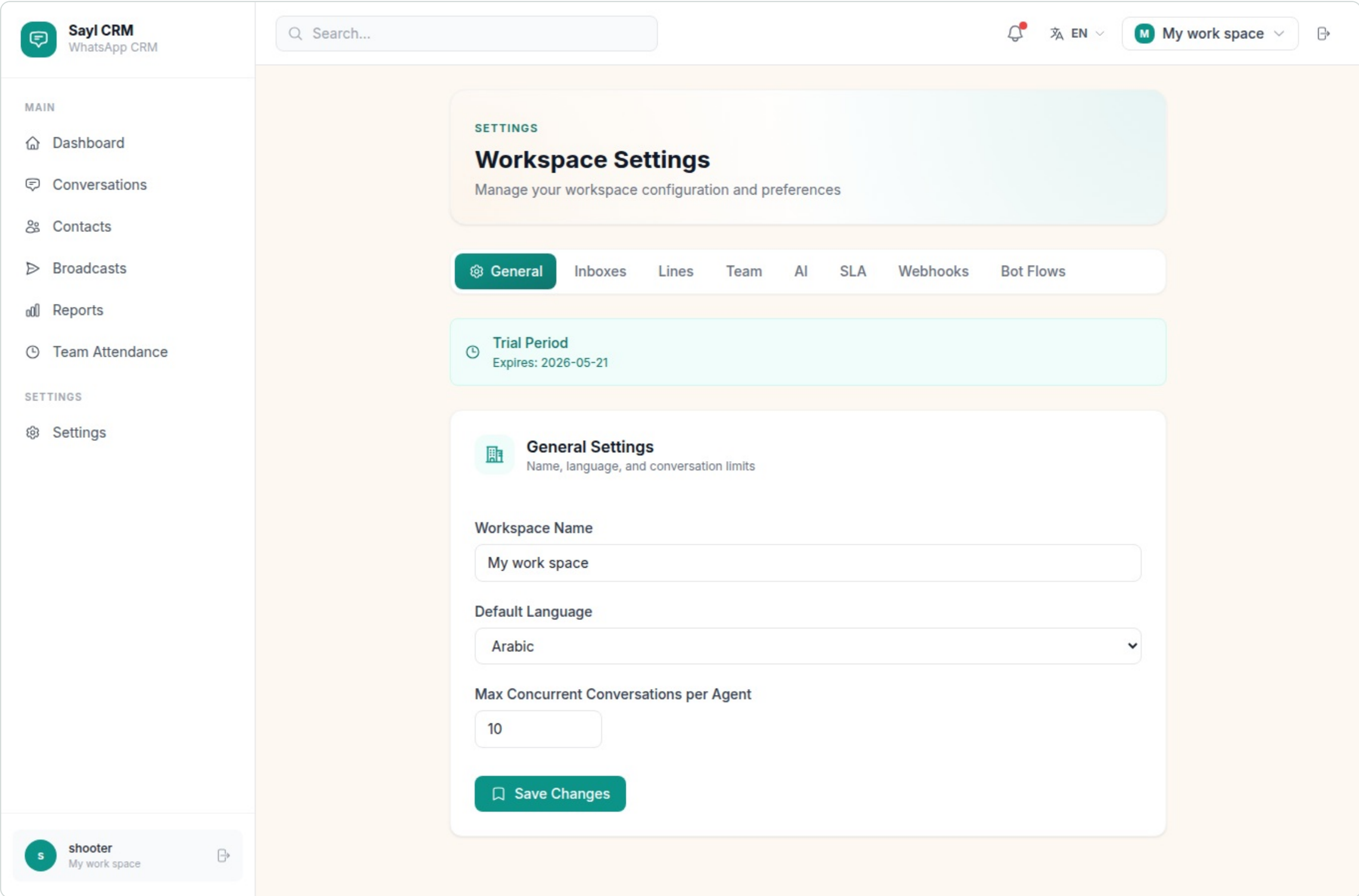


The login screen — Arabic and English supported, RTL primary.

Workspace-wide preferences

The *Settings → Workspace* page is where the Owner controls the platform-wide defaults. Three things matter most:

- **Workspace name** — appears in the top-bar workspace switcher, in invitation emails and in PDF exports.
- **Default language** — Arabic or English. Sets the locale for new agents and for outgoing automated messages where no per-conversation language has been detected.
- **Max concurrent conversations per agent** — auto-assignment respects this cap. If an agent is already at the cap, the next inbound conversation goes to whichever colleague is below their cap. Set it conservatively at first (8–12 is healthy for chat); raise it once you have data.



Settings → Workspace — workspace name, default language, the auto-assignment cap, and your trial-period status banner at the top.

> **Why concurrent-conversation caps matter.**
>
> Without a cap, the busiest agent gets every new conversation until they collapse. With a cap, work spreads evenly and agents can give each chat enough attention. The default of 10 is a starting point — measure your average handle time and adjust monthly.

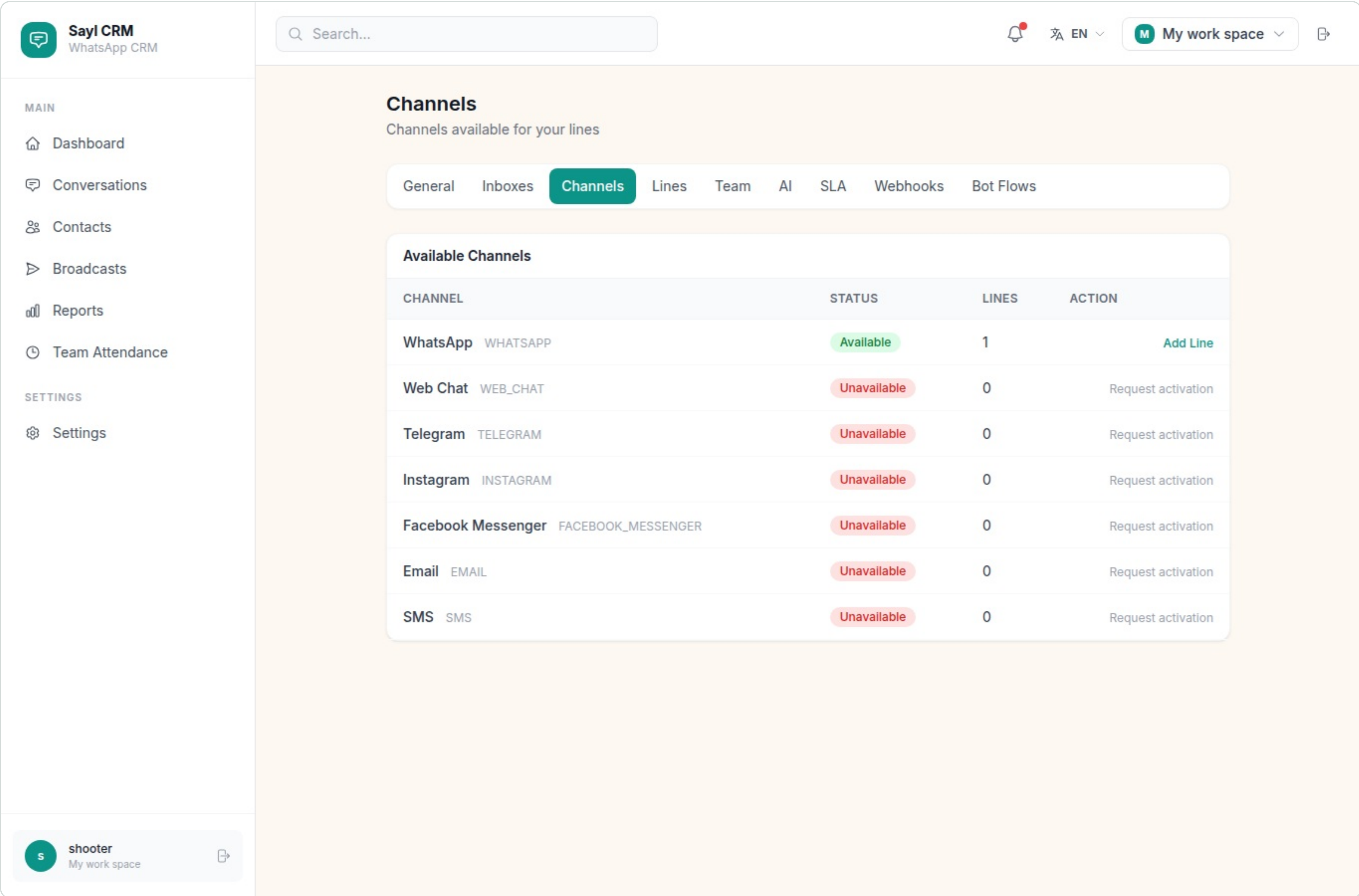
Multi-workspace switcher

One user account can belong to multiple workspaces with different roles — for example you might be an Owner of your own company's workspace and a Manager for a partner's. After login, you'll see a workspace selector if you belong to more than one. Switch later from the avatar in the top-right corner.

> **You're now ready to receive messages.**
>
> Send a test message from your phone to the WhatsApp number you connected. The conversation should appear in the inbox within a few seconds, assigned to whoever is online and matches the language.

3. Connecting WhatsApp and other channels

Each channel uses its own setup, but the pattern is the same: open *Settings → Channels → [name]*, click *New line*, paste the credentials we ask for, and save. A "line" is one phone number / page / bot — you can have many lines per inbox, and many inboxes per workspace.

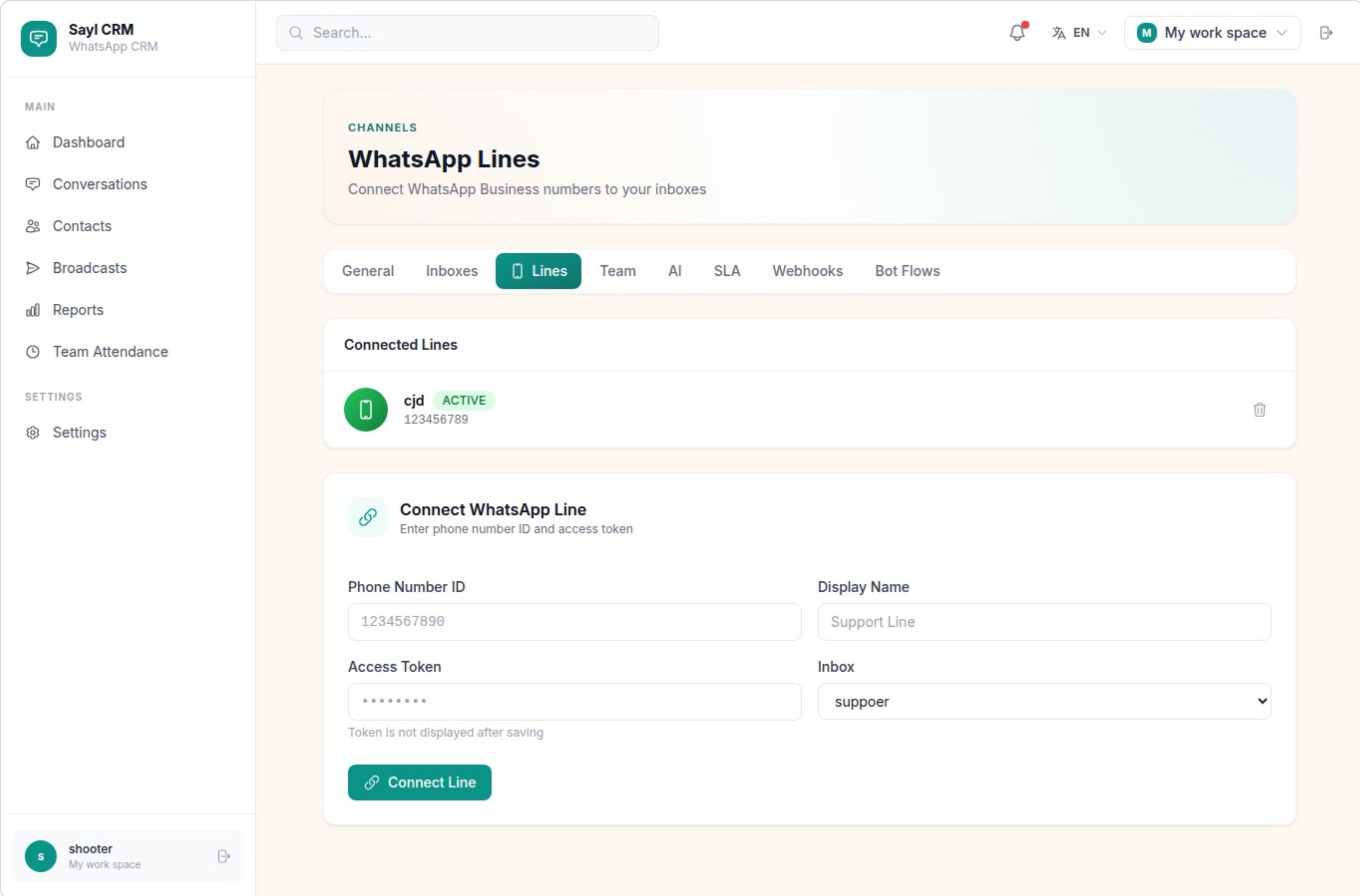


Settings → Channels — every channel your workspace can use, plus the count of active lines per channel. Channels marked Unavailable can be requested from your platform admin.

WhatsApp (Meta Cloud API)

The flagship channel and the one most teams start with.

1. **In Meta Business Manager:** create a WhatsApp Business app, add a phone number, and copy your *Permanent Access token*, *Phone number ID*, and *Business account ID*.
2. **In Sayl CRM:** go to *Settings → Lines → Connect WhatsApp Line*, paste the three values, give the line a friendly display name (shown to agents), and pick which inbox the line belongs to.
3. **Set the webhook in Meta:** we'll show you the URL to paste back into the Meta dashboard, plus the verify token. Subscribe to the *messages* field. Sayl verifies every webhook payload using HMAC-SHA256 against your app secret — anything unsigned or replayed is dropped.
4. **Test:** send a message from your phone to the connected number. It should land in the inbox within 5 seconds.



Settings → Lines — your connected WhatsApp Business numbers. The access token is stored AES-256-GCM-encrypted at rest and is never displayed again after saving.

> **One number → one inbox.**
> WhatsApp doesn't allow the same phone number to be connected to two CRMs. Disconnect from any previous platform before you connect here.

Web Chat widget

Embed a chat bubble on your website so visitors can message you directly. After creating a Web Chat line, copy the small `<script>` snippet we generate and paste it into your site's HTML before `</body>`:

```
<script src="https://your-saylcrm-host/js/sayl-chat-widget.js"></script>
<script>
  SaylChat.init({ lineKey: "your-public-line-key", primaryColor: "#0D9488" });
</script>
```

You can pin the bubble's colour, the welcome message, and the list of allowed embed origins — anyone trying to load the widget on an unlisted domain gets a 403. Visitors are persisted via a signed cookie (HMAC-keyed by the platform encryption key), so the same browser keeps its identity across reloads.

Telegram

Create a Telegram bot via *@BotFather*, copy the bot token, paste it into *Settings → Channels → Telegram → New line*. Sayl registers the webhook with Telegram automatically. Each Telegram inbound is verified using the `X-Telegram-Bot-Api-Secret-Token` header so spoofed updates can't reach your inbox.

Email (IMAP + SMTP)

Add the credentials of a shared mailbox — for example `support@yourcompany.com`. Inbound mail is fetched on a 30-second poll and surfaced as conversations; replies are sent through your SMTP server. Threading is preserved using the standard `Message-ID` / `In-Reply-To` headers, so a reply on a forum or distribution list still resolves to the original conversation. Mailgun inbound webhooks are also supported.

SMS (Twilio)

Create a Messaging Service in your Twilio console, copy the account SID and auth token, then add a Sayl SMS line. Sayl provides the inbound webhook URL to paste into Twilio. Outbound is sent through Twilio's standard messaging API; delivery receipts feed back into the same conversation.

Facebook Messenger and Instagram DMs

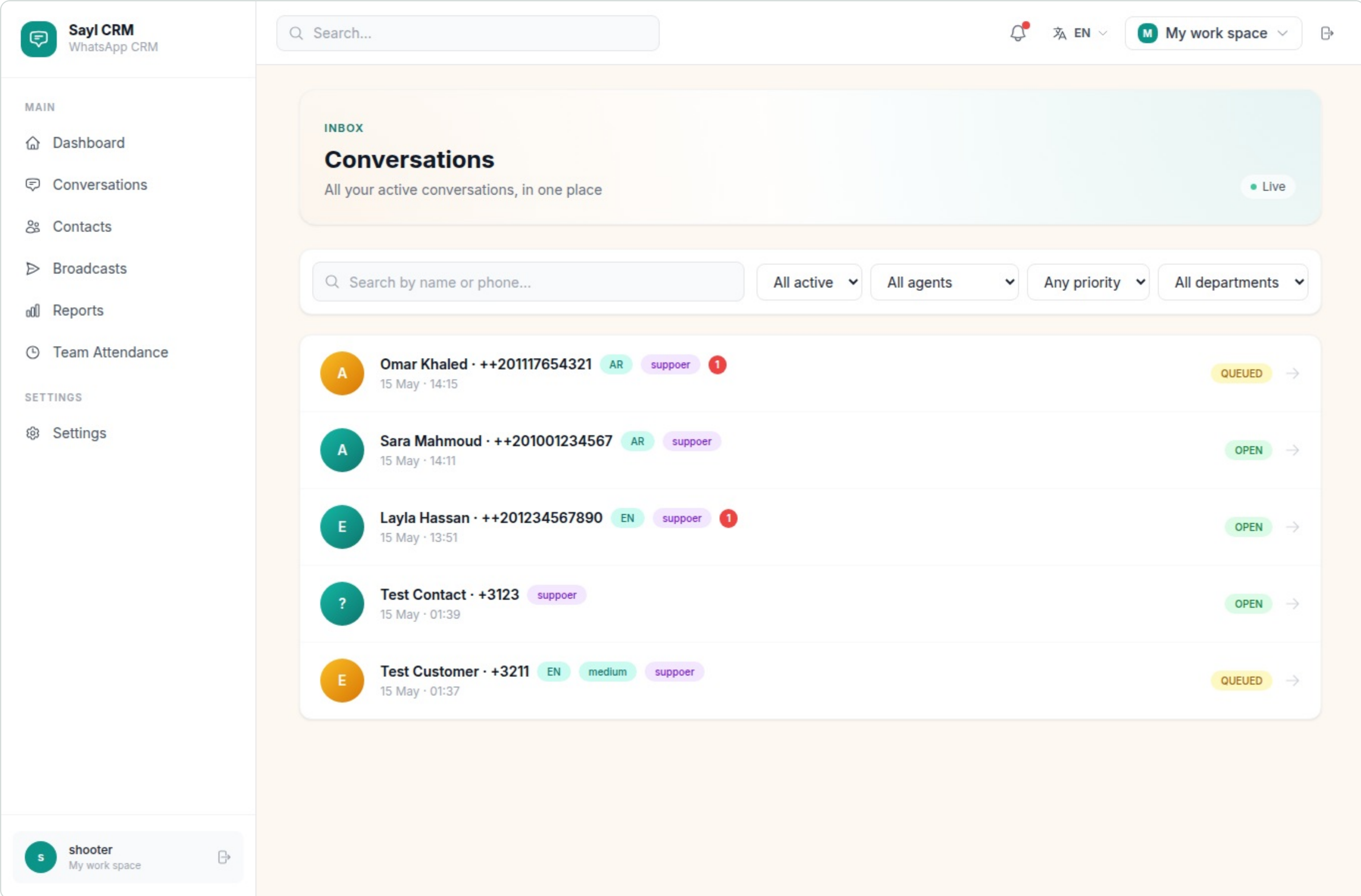
Both are configured under *Settings → Channels → Meta Page*. After granting page access, every direct message becomes a conversation in the unified inbox. Page-level OAuth handles refresh — you don't need to rotate tokens by hand.

> **Test mode for safe trials.**

An owner can switch the workspace into test mode before going live — outbound messages are logged instead of sent, so the team can practise without using real WhatsApp credits.

4. Working in the inbox

The inbox is where most of your team will spend their day. The left column lists conversations, the centre shows the active conversation, and the right shows everything you need to know about the contact you're chatting with.



Conversations list — language, department and unread-count badges show at a glance who needs attention. Status pills (QUEUED / OPEN / PENDING / CLOSED) and per-line filters keep the busiest inbox readable.

Filtering and finding conversations

- **Status filter:** Open, Queued, Pending, Closed.
- **Assignment filter:** All, Mine, Unassigned.
- **Agent filter:** any specific teammate (Manager / Owner only).
- **Priority filter:** Urgent / High / Medium / Low.
- **Department filter:** the line's logical department (e.g. *support*, *sales*).
- **Search:** by contact name, phone, or any text inside any message — the search index covers the full message body.
- **Saved filters:** save your most-used combinations so you can return to them with one click.

How auto-assignment works

When a new inbound conversation arrives, Sayl picks an agent in this order:

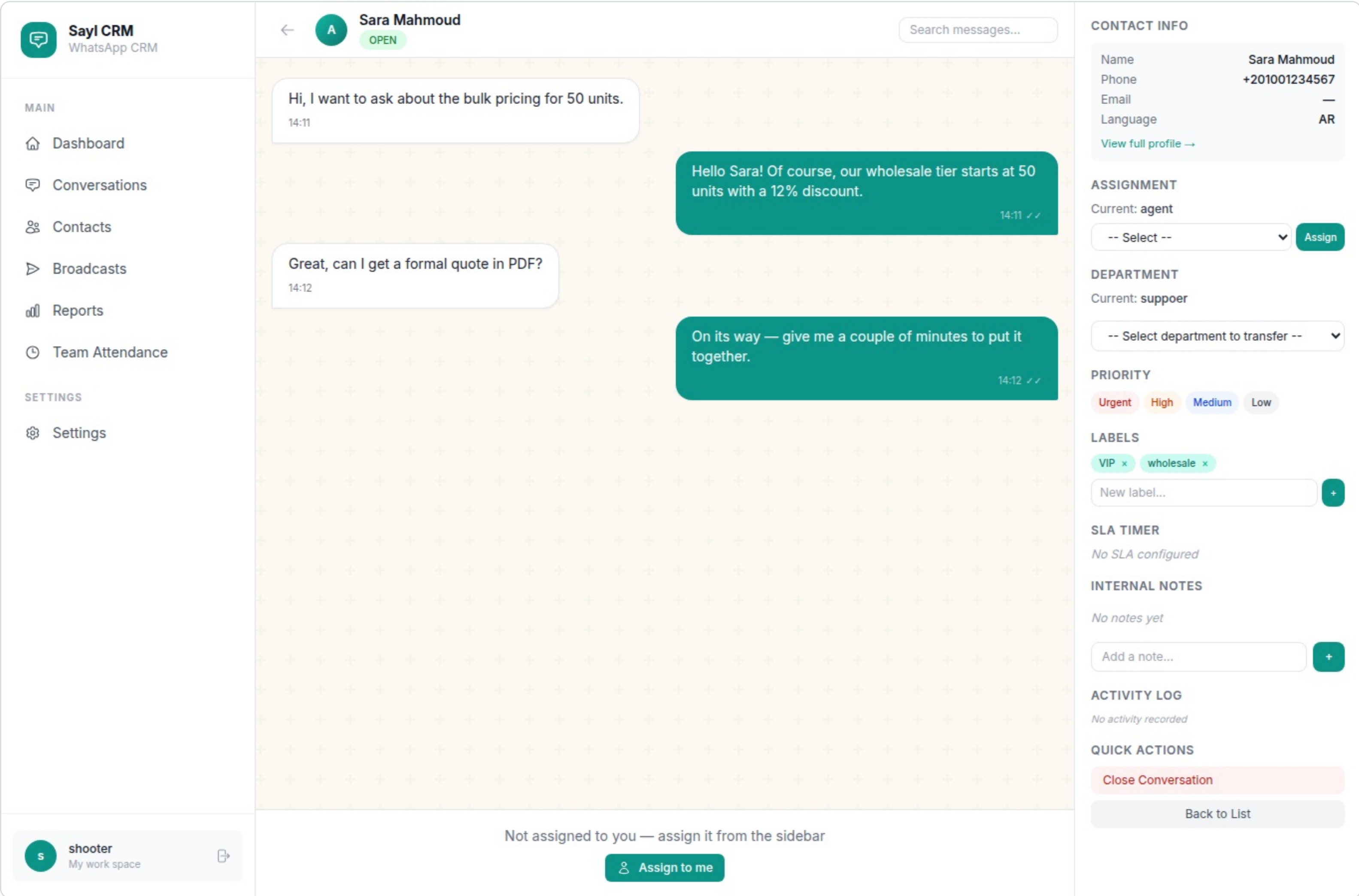
1. The agent must be a member of the inbox the line belongs to.
2. Their language list must include the conversation's detected language. If the customer wrote in Arabic, agents who only speak English are skipped.
3. They must be online (the inbox tab open in their browser within the last 60 seconds).
4. Among those who pass, the agent with the *fewest active conversations* wins. Ties are broken randomly.

If nobody passes all four checks, the conversation goes into the queue. A bot flow with the `NO_AGENT_AVAILABLE` trigger can hold the customer with a polite holding message until someone comes online (see section 9).

> **Why language-aware routing matters.**
>
> One bad auto-translation can lose a sale. Sayl's "skip the agent if they don't have the language" rule sounds strict, but it means the customer always gets a real human who can read what they wrote — and the agent never opens a conversation they can't actually help.

5. Inside a conversation — what an agent can do

Click any conversation in the list and the chat view opens. This is where the agent actually does their work, and Sayl puts every tool they might need in arm's reach without burying anything in submenus.



The conversation view — message thread on the left, contact panel on the right with assignment, department, priority, labels, SLA timer, internal notes, activity log and quick actions all visible at once.

The right-hand panel — every action one click away

Panel	What it does
Contact info	Name, phone, email, language. Click *View full profile* to open the contact card with all of their conversations and deals.
Assignment	Shows who currently owns the conversation. Owners and managers can re-assign by picking an agent from the dropdown; agents can grab unassigned chats with the *Assign to me* button at the bottom of the thread.
Department	Transfer the conversation to a different department (e.g. from *support* to *sales*) without losing the thread. The new department's agents are immediately notified.
Priority	One-click pills: *Urgent*, *High*, *Medium*, *Low*. Used by the inbox filter and the SLA scanner; urgent breaches surface first in the manager's alert feed.
Labels	Free-form tags such as *VIP*, *wholesale*, *refund*. Type to autocomplete from labels other agents have used. Useful for filtering reports later.
SLA timer	Counts down to the inbox's first-response target. If the inbox has no SLA configured, you'll see *No SLA configured*. Once breached, the conversation is highlighted in red and an alert is sent to managers.
Internal notes	Private comments only your team sees. Use `@name` to mention a colleague — they'll get a notification with a deep-link back to the message. Notes never leave the platform.
Activity log	The audit trail for this conversation: who assigned what, who escalated, who changed priority, who attached labels. 90-day retention; exportable per-conversation as CSV / JSON / PDF.
Quick actions	*Close conversation* ends the thread (it re-opens automatically if the customer messages again). *Back to list* takes you to the inbox.

The composer — replying, noting, attaching

1. **Type your reply** in the box at the bottom. *Enter* sends, *Shift+Enter* inserts a new line. Drafts auto-save every few seconds, so a refreshed tab doesn't lose what you wrote.
2. **Switch to *Note* mode** for an internal comment that the customer never sees. Mentions (`@`) work the same way as in the right-side notes panel.

3. **Attach a file** with the paper-clip icon. Sayl checks the file type with Apache Tika before sending; anything WhatsApp can't accept is rejected before it hits Meta's API. Images, audio, video, PDFs and common documents are supported.

4. **Use canned responses** by typing `/` in the composer — your team's reusable replies appear with previews. Canned responses can include placeholders that Sayl substitutes automatically (contact name, agent name, today's date).

5. **Search the message history** with the search box above the thread. The query is local to this conversation, full-text, and matches both inbound and outbound messages.

Escalation, transfer and close

- **Escalate** raises a flag the Manager can pick up — useful for complaints or VIP customers. An SSE notification is pushed to every Manager / Owner in real time.
- **Transfer** reassigns the conversation to another agent or another inbox. The previous agent's draft is discarded; a system message marks the handover.
- **Close** ends the conversation. CSAT (when configured) is sent automatically as the customer's next chance to reply. If the customer messages again within 24 hours the conversation re-opens; later replies create a new conversation.

SLA timers and how breaches surface

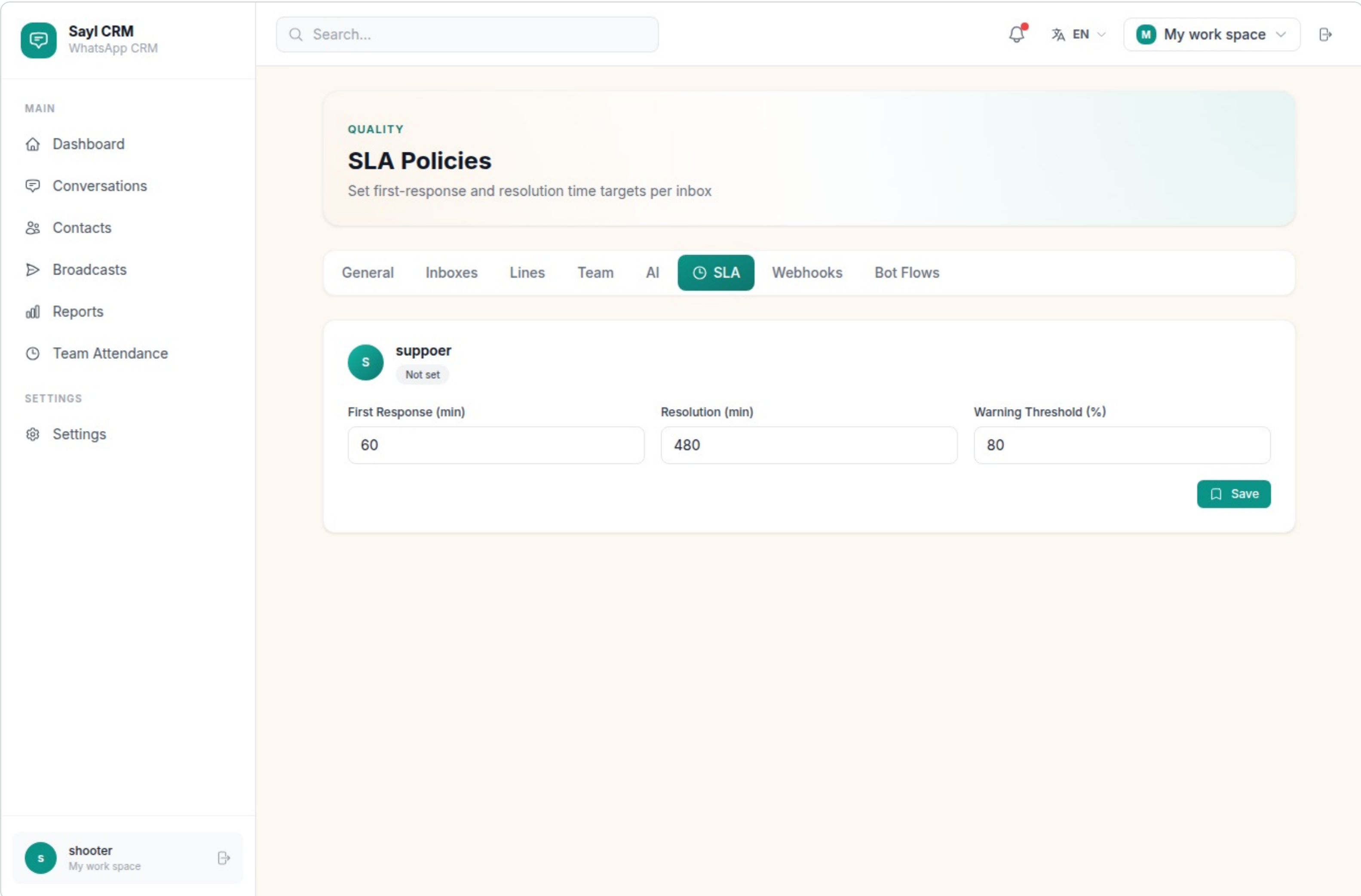
Each inbox has a target first-response time. The conversation header shows a live countdown; the inbox list shows the same as a coloured pill. When the SLA breaches, three things happen at once:

- The conversation is highlighted in red in every inbox view.
- Managers get a real-time SSE alert in the bell icon at the top of the screen.
- An audit-log entry records the breach with the responsible agent — visible later in the per-agent SLA report.

Configuring SLA per inbox

Each inbox can have its own SLA targets. Open *Settings → SLA* to set them. The page lists every inbox in the workspace with three editable fields:

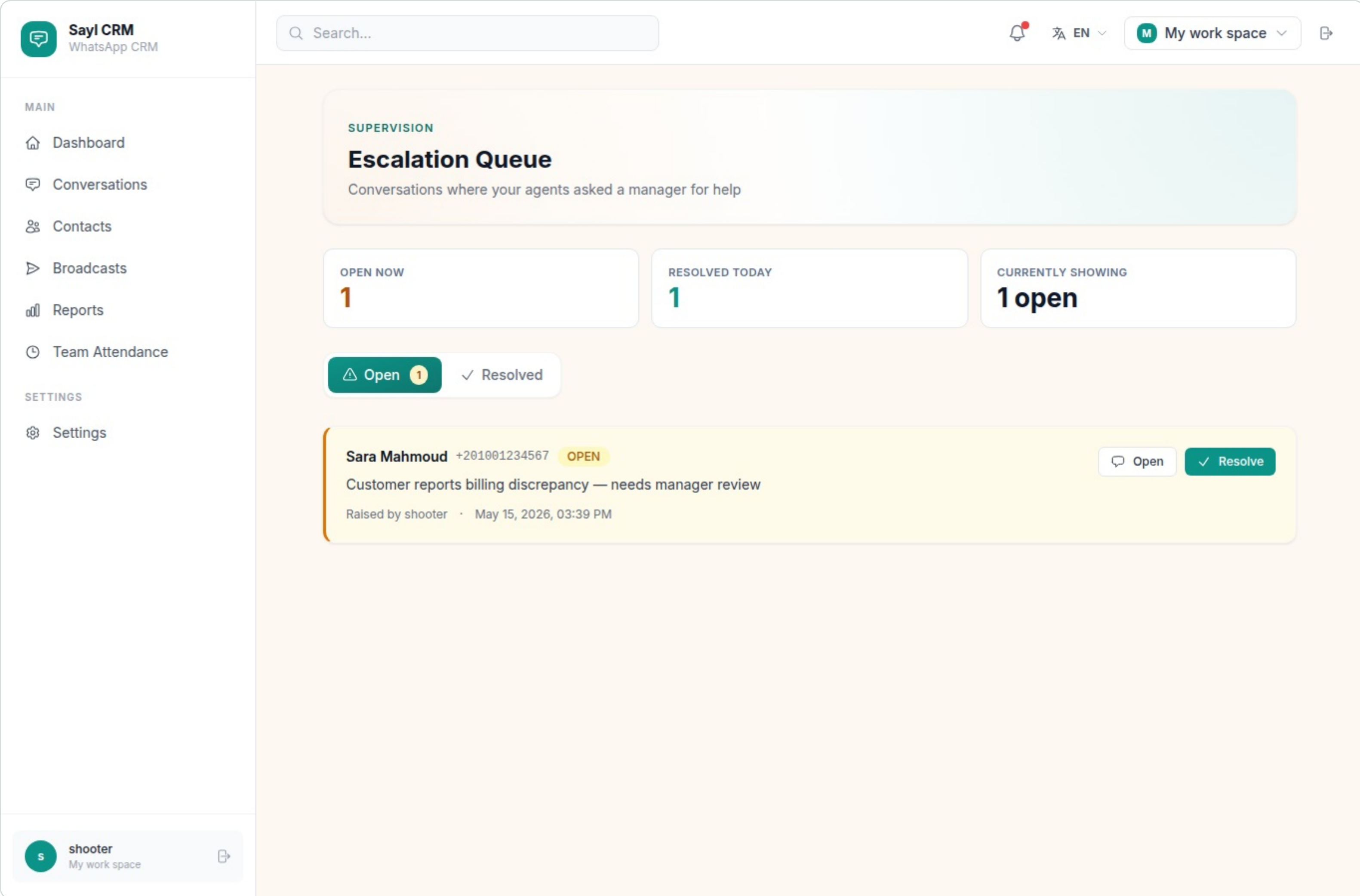
- **First Response (min)** — how many minutes from inbound message to the first agent reply before the SLA is considered breached. Common values: 15 min for sales, 60 min for support.
- **Resolution (min)** — total time from open to close. Common values: 240 min (4 h) for transactional, 1440 min (24 h) for complex support cases.
- **Warning Threshold (%)** — percentage of the SLA at which a "warning" status is displayed (an early heads-up before the actual breach). 80% is a sensible default.



Settings → SLA — set first-response, resolution and warning-threshold targets per inbox. The badge next to each inbox shows whether a policy is configured.

6. Escalation queue — manager triage

When an agent runs into something they can't (or shouldn't) handle alone — a complaint, a refund request, a senior-level decision — they click *Escalate* in the conversation. That conversation lands in the *Escalation queue*, a dedicated workspace for managers to triage flagged conversations.



Escalations page — open and resolved counts at the top, filter tabs, and a card for each escalation with the original note, who raised it, and one-click Open / Resolve actions.

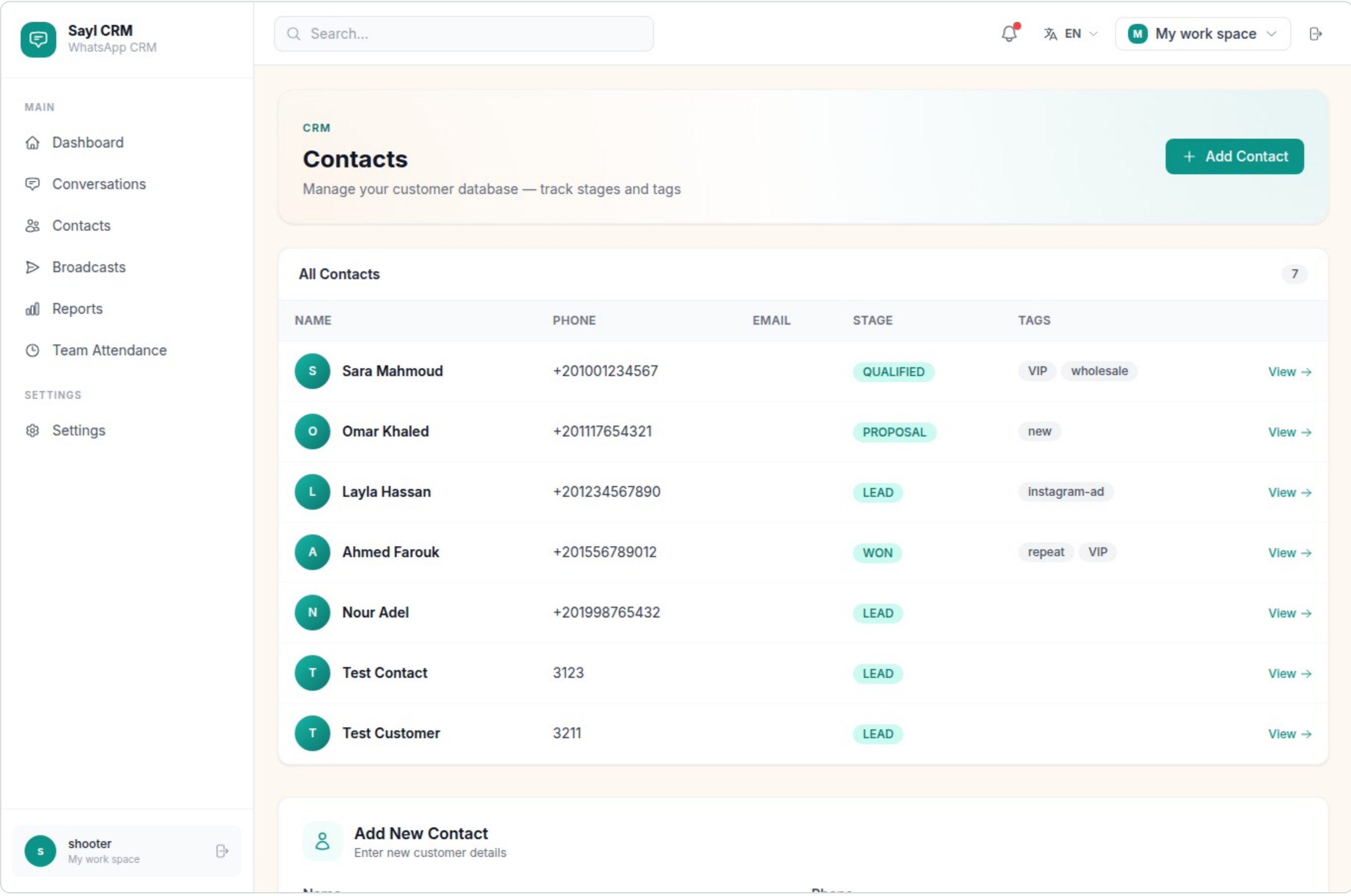
What the page gives a manager

Element	What it does
Open / Resolved tabs	Switch between the queue of open escalations and the audit trail of past ones.
Stat tiles	*Open now*, *Resolved today* and *Currently showing*. Useful as a quick-glance health check at the start of every shift.
Escalation card	Shows the contact name, phone, the agent who raised it, the time, and the note explaining what's wrong. Resolved cards also show who resolved it and when.
Open	Jumps straight to the conversation — no menu hunting.
Resolve	Marks the escalation as handled. The conversation stays open if the customer's issue isn't yet fully resolved; this only signals "no manager attention required".

> **How escalation differs from transfer.**
> A *transfer* hands the conversation to a different person. An *escalation* keeps the original agent on it but raises a flag asking a manager to review or step in. The agent doesn't lose ownership unless the manager explicitly transfers the chat.

7. Managing your contacts & the deals pipeline

A contact is automatically created the first time anyone messages you on any channel — Sayl never asks an agent to create a record by hand for an inbound conversation. From the *Contacts* tab you can:

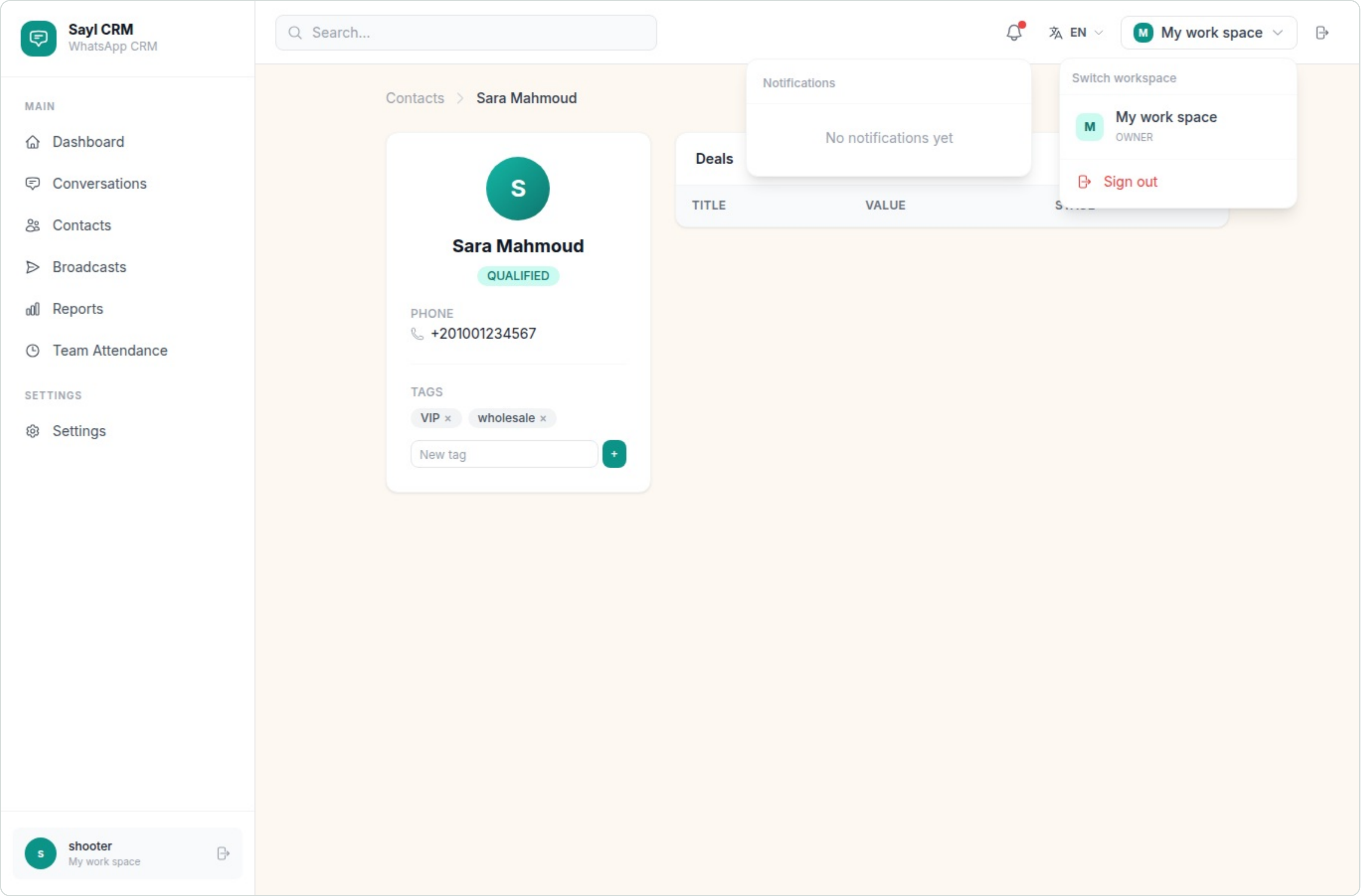


The contacts list — pipeline stage and tags travel with the contact across every channel and every conversation.

- See every contact, sorted by most recent activity.
- Filter by tag, pipeline stage, language, channel or assigned agent.
- Open a contact card to see all conversations they've ever had with your team — across every channel.
- Add notes, tags and a pipeline stage (Lead, Qualified, Proposal, Won, Lost).
- Bulk-update many contacts at once — change stage, add a tag, archive — from the *Bulk actions* menu when more than one row is selected.

The contact card

Click any contact name to open their card. Everything Sayl knows about that person lives here:



Contact card for Sara Mahmoud — pipeline stage, phone number, tags and any deals associated with the contact.

Section	Use
Header	Avatar, name, pipeline stage badge.
Phone	The canonical channel identifier (E.164 for WhatsApp / SMS, an opaque token for Web Chat).
Email	Optional. Used for outgoing email replies if you've connected an email line.
Language	Set automatically the first time the customer writes; can be edited.
Tags	Free-form labels — type and press + to add. Filter contacts and broadcast audiences by tag.
Deals	Linked sales-pipeline records. Tracks value, expected close date and stage.

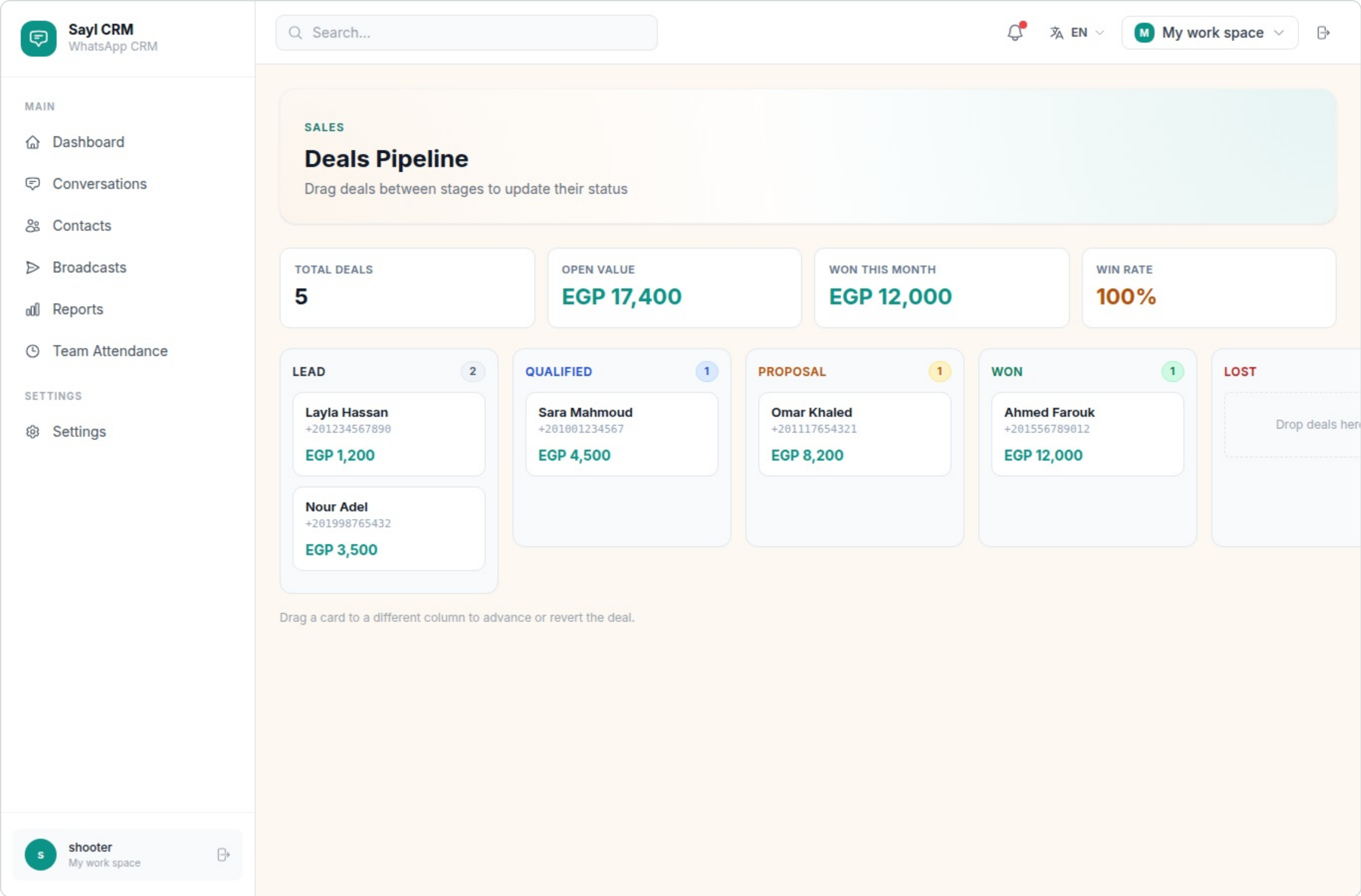
Pipeline stages

Every contact carries a single pipeline stage. The defaults are *Lead* → *Qualified* → *Proposal* → *Won* → *Lost*. Stages drive two things:

- **Reporting** — pipeline-stage counts on the dashboard and conversion analytics over date ranges.
- **Broadcast targeting** — send a campaign only to *Qualified* leads, or only to *Won* customers for a thank-you message.

The deals pipeline (kanban)

Open *Deals* → *Pipeline* for the full sales view. It's a drag-and-drop kanban board: each column is a stage, each card is a deal linked to a contact. Drag a card from one column to another and the contact's pipeline stage and the deal's stage advance together — no double bookkeeping.



Deals pipeline — summary tiles at the top (total deals, open value, won this month, win rate) and a kanban board below. Drag cards to move them between stages.

Tile	What it shows
Total deals	Count of every deal in any open or closed stage.
Open value	Sum of values for deals in *Lead / Qualified / Proposal*. The "deal pipeline" you're carrying.
Won this month	Sum of values closed as won in the current month — the "money in" figure your finance team will care about.
Win rate	Won ÷ (Won + Lost). The percentage of decided deals that landed in your favour.

> **Why drag-and-drop matters.**
> Spreadsheet pipelines die because nobody updates them. A kanban board where moving a card is one drag is fast enough that agents actually keep it current — and because the move triggers an audit-log entry, you have a clean record of when each deal advanced.

Importing and exporting

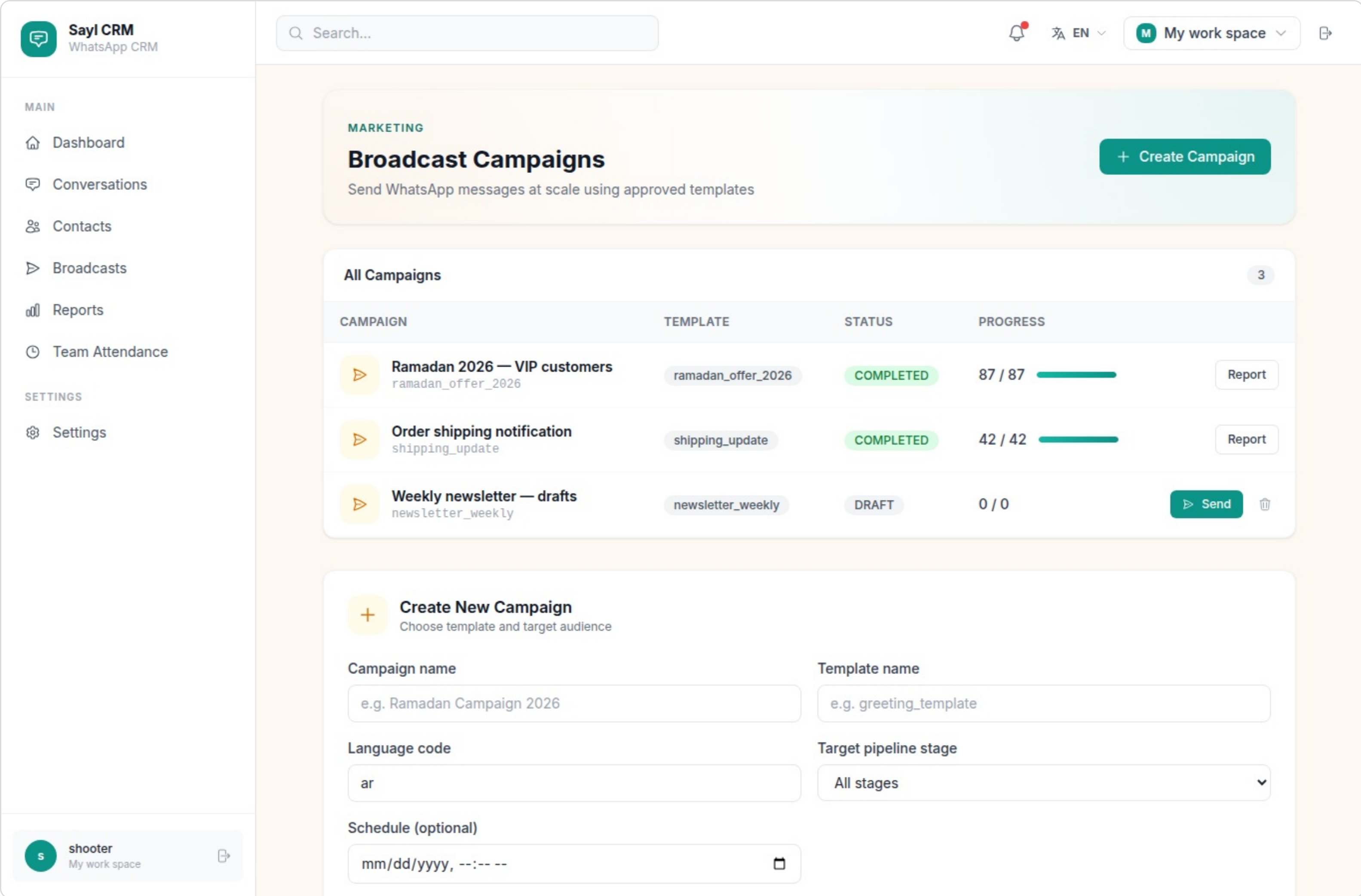
Use *Contacts → Import* to upload a CSV. The file should have `phone` as a required column; `name`, `email`, `tags`, `language` and `pipeline_stage` are optional. Existing contacts (matched by phone) are updated, not duplicated. Tag columns can be comma-separated.

Contacts → Export produces a CSV, JSON, or PDF. PDFs include Arabic right-to-left rendering using the bundled Noto Naskh font — a single export round-trip preserves Arabic text correctly, which is something most generic CRM exporters get wrong.

> **Why the unified contact matters.**
> Customers expect you to remember them, even if they switched channels. With Sayl's one-contact-per-person model, an agent answering a WhatsApp question can see that the same person emailed last month and called the office last week. No more "let me check with my colleague" delays.

8. Sending broadcast campaigns

A broadcast sends a pre-approved WhatsApp template to a chosen audience. Because WhatsApp requires templates to be approved in advance, this isn't a free-form mass-mail tool — it's a way to send legitimate, opt-in transactional or promotional content.



Broadcasts page — past campaigns at the top with live progress bars (sent / total and delivered counts), the campaign builder below for creating new ones.

Building a campaign

1. **Choose your template.** Templates are managed in Meta Business Manager and synced into Sayl. Only *APPROVED* templates can be used. Each template has a category (*Marketing*, *Utility*, *Authentication*) which Meta uses to price the message.
2. **Pick your audience.** Filter by tag, pipeline stage, language, or upload a CSV of phone numbers. The audience size is shown live as you adjust filters.
3. **Fill the template variables.** Templates with placeholders (`{{1}}` , `{{2}}` …) need values either as fixed text or mapped to a contact field (e.g. `{{1}} = contact.name`).
4. **Schedule (optional).** Send now, or pick a date and time. Scheduled campaigns sit on the queue until the moment fires.
5. **Preview and confirm.** Sayl shows you the rendered message and the contact count. The cost-per-message is set by Meta — Sayl doesn't add a markup.
6. **Watch it go.** The send rate is capped at 80 messages per second to stay within Meta's limits. Live counters show Sent / Delivered / Read / Failed, and a per-recipient table shows delivery status with the failure reason if any.

What you can target

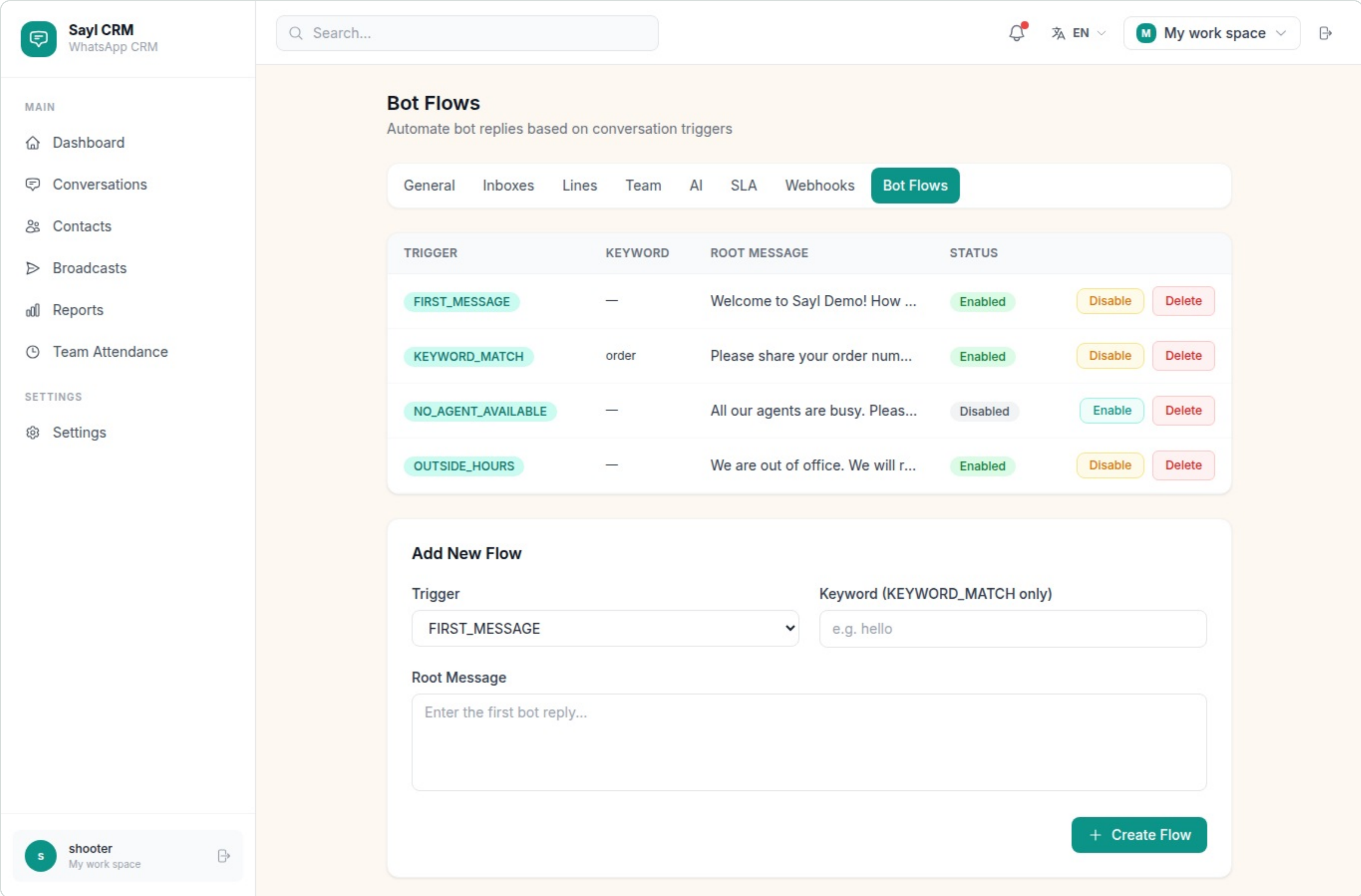
Filter	Example
Tag	"VIP", "wholesale", "ramadan-2026"
Pipeline stage	"Qualified" (warm leads), "Won" (existing customers)
Language	Send the Arabic template to Arabic speakers, English to the rest
Last interaction	"Active in the last 30 days" — keep your audience warm under WhatsApp's 24-hour window rules
Manual list	Upload a CSV of phone numbers — Sayl creates contacts for any new ones

About template approval.

Sayl can't submit templates to Meta automatically — that step is done by you in Meta Business Manager. It usually takes a few minutes, occasionally a few hours. Marketing templates have stricter content rules than utility templates.

9. Building automated bot flows

Bot flows reply automatically to specific situations. Each flow has a trigger and a tree of steps. Used well, they handle the repetitive 80% of inbound traffic so your humans can focus on the 20% that actually needs a human.



Settings → Bot Flows — list of flows on the workspace with their trigger, optional keyword, root message and enable/disable status. The form below lets you add a new flow inline.

Triggers

Trigger	Fires when...	Typical use
`FIRST_MESSAGE`	This is the first time the contact has ever written to you.	Welcome message, set expectations on response time.
`KEYWORD_MATCH`	The customer's message contains one of the keywords you set.	"price" → opening hours, "track order" → order-status flow.
`OUTSIDE_HOURS`	The message arrives outside the inbox's business hours.	"We're back tomorrow at 9 AM. Leave your question and we'll reply first thing."
`NO_AGENT_AVAILABLE`	No agent is online or in working hours.	Holding message during a known busy period.

Building a flow

Open *Settings → Bot Flows → New Flow*. Give it a name and a trigger, then add steps. Each step can:

- Send a fixed message.
- Ask a question and branch on the answer (regex / keyword / numeric range).
- Tag the contact, change pipeline stage, or assign to an inbox.
- Hand off to a human agent — the customer's path through the bot is preserved as internal notes so the agent has the context.

Test your flow with the *Try it* button before turning it on for real customers — you can simulate inbound messages and see exactly what the bot would reply.

> **Why a decision-tree, not a free-text bot.**
>
> Free-text bots that "understand" anything are also bots that get things wrong, expensively. Sayl's flows are deterministic: every step is something you wrote, every branch is something you tested. When the flow can't help, it hands off to a human cleanly. AI features (section 10) live in the *agent's* hands, not on the customer's side.

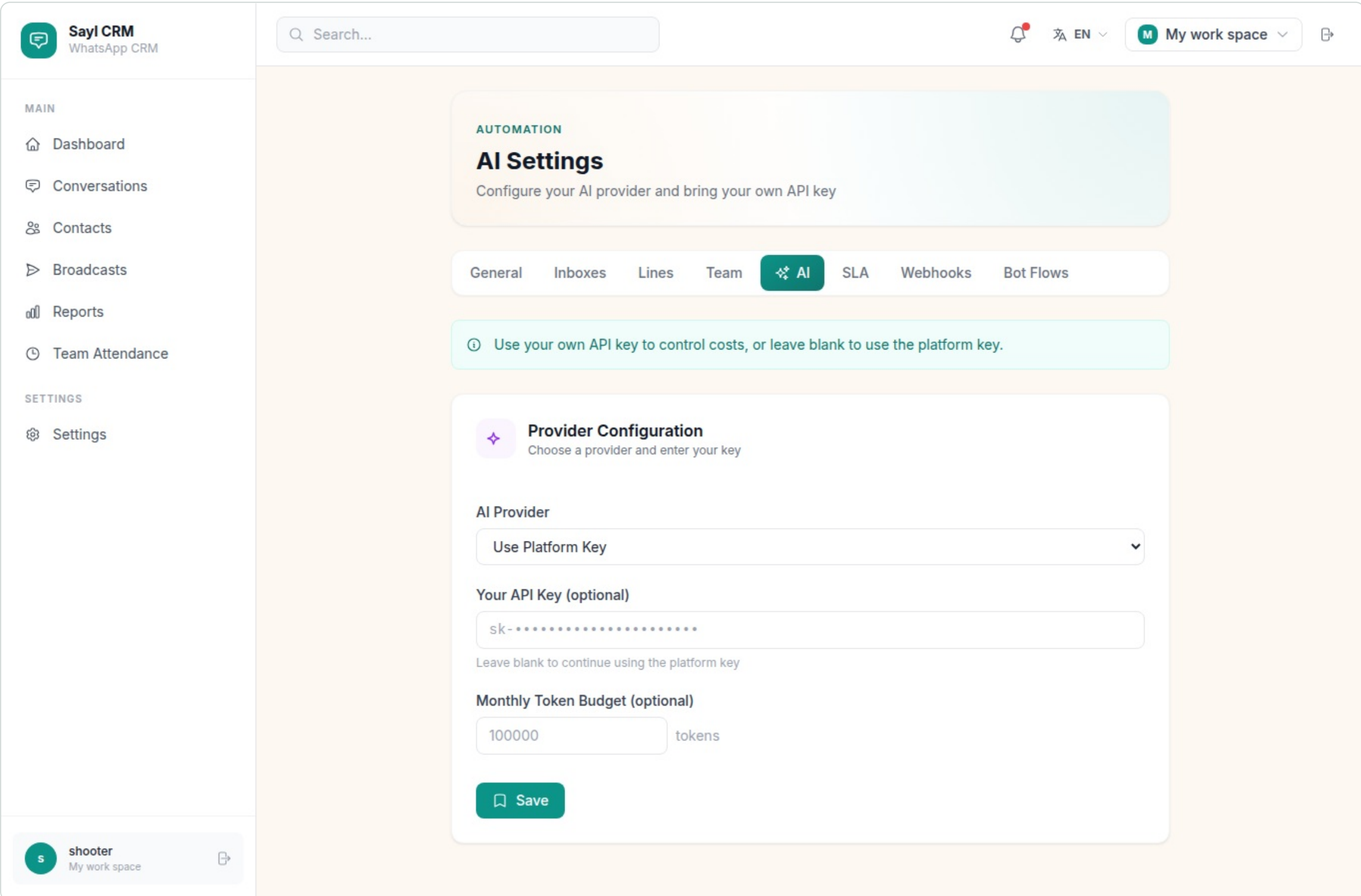
10. AI features

The AI panel sits next to every conversation. It does five things, all optional and all opt-in. Nothing is sent to an AI provider unless an agent explicitly clicks the corresponding button.

Feature	What it does	When agents use it
Reply suggestions	Three suggested replies in the conversation language.	To unblock during a busy hour or to phrase a tricky message politely.
Translation	One-click translation of any incoming message into the agent's UI language.	When a non-Arabic / non-English customer reaches a bilingual-only inbox.
Voice transcription	Voice notes appear with a transcript. Audio is processed in memory and never written to disk.	Reading is faster than listening; the transcript is searchable.
Sentiment	Each message is tagged with a sentiment score so Managers can spot frustrated customers.	Used by reports to flag conversations trending negative.
Summary	Long conversations get a one-paragraph summary at the top of the thread.	When a conversation is transferred to a new agent.

Bring your own AI key

Owners can plug in their own OpenAI, Anthropic, Gemini or Azure OpenAI key under *Settings → AI*. You set a monthly token budget; once it's used up Sayl pauses AI features for the month or, if a platform fallback key is configured, switches to it transparently.



Settings → AI — pick a provider, paste an API key, set a monthly token budget. Leave it on Use Platform Key to start with the platform fallback.

Picking the right provider

Provider	Best at	Watch out for
OpenAI	Reply suggestions, summaries, transcription via Whisper.	Token-based pricing — set a budget you can live with.
Anthropic (Claude)	Long-conversation summaries, nuanced Arabic responses.	Per-region availability — confirm your key works from your deployment region.
Gemini	Strong at translation; competitive pricing.	Different rate-limit shape than OpenAI; bursty usage hits caps faster.
Azure OpenAI	Enterprise compliance (data residency, BAA).	Provisioning latency — you provision a deployment in advance, not just paste a key.

What is sent to the AI provider?

Only the messages you choose to act on (e.g. a single conversation when you click "Suggest replies"). Contact PII like phone numbers is masked before being sent. The conversation is never used by the platform to train any model.

11. Team, roles and permissions

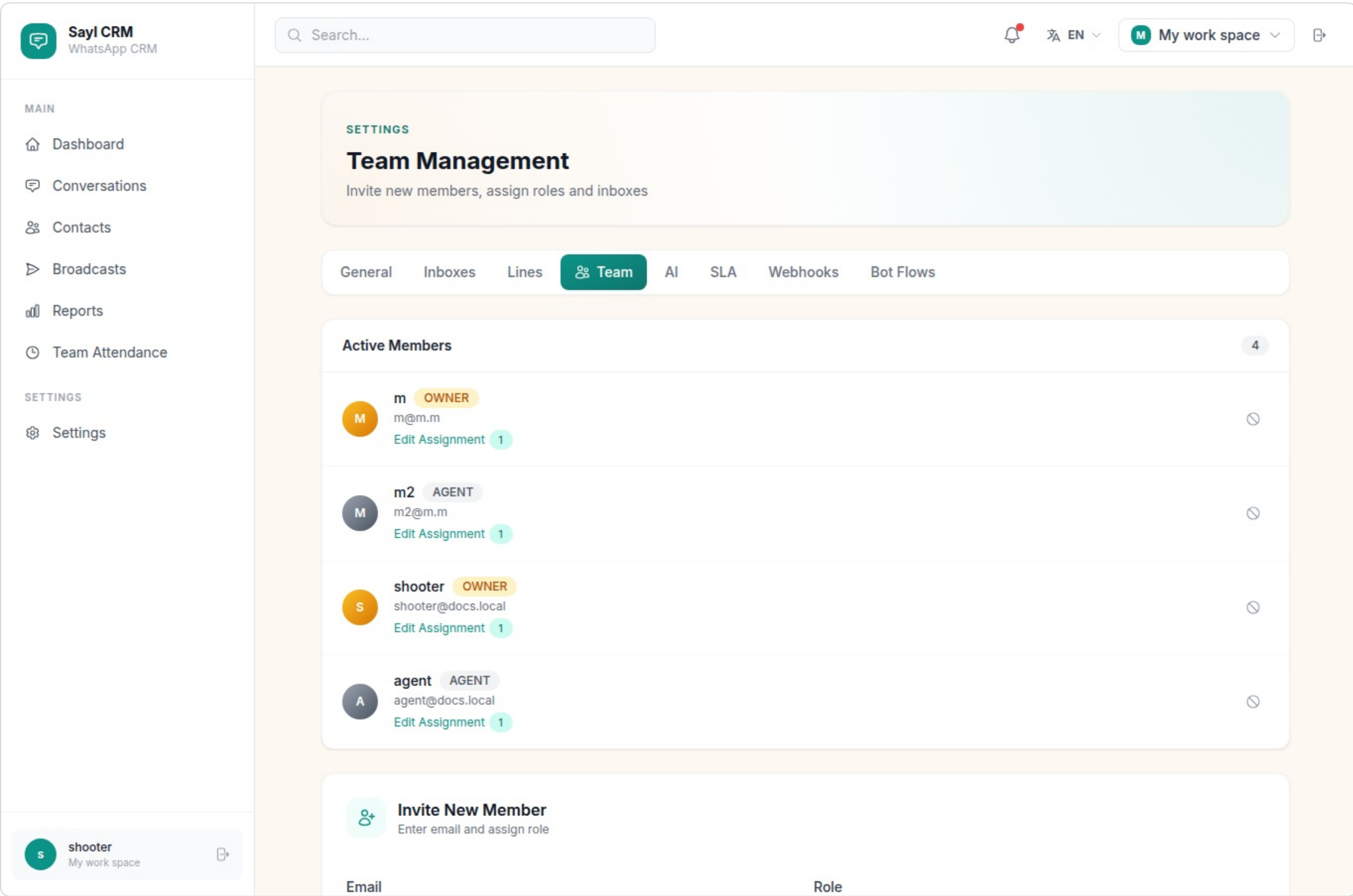
Sayl has three workspace roles plus per-feature permissions for fine-grained control. Roles set the defaults; per-member overrides let you tighten or relax access for any individual.

The roles

Role	Can do	Cannot do
Owner	Everything: billing, channels, team, reports, conversations.	Nothing — Owner is the top of the workspace tree.
Manager	Conversations, contacts, broadcasts, bot flows, reports. Can assign inboxes to agents.	Billing, AI key changes, deleting the workspace.
Agent	Reply to conversations in their assigned inboxes. Read-only on contacts and reports.	Re-assigning conversations to other agents (Managers do that), broadcasts, settings.

Inviting and managing the team

1. Go to *Settings* → *Team*.
2. Click *Invite member*, type their email, pick a role and which inboxes they belong to.
3. They get a one-time invitation link valid for 7 days. After clicking, they set a password and they're in. The token is opaque (random 32-byte) — invitations cannot be guessed.
4. To remove someone, suspend their membership. Their conversations stay on the platform; the person just can't log in. To restore access, un-suspend — no need to re-invite.
5. To change someone's role, open their member page and pick a new role. Permission changes take effect on their next page load.



Settings → Team — every member with their role badge and inbox-assignment count, with the invite form below.

Per-member permissions

Owners can fine-tune any single agent's permissions at *Settings* → *Team* → *[member]* → *Permissions*. The full permission list:

Permission group	Examples
Conversations	View, reply, transfer, close, escalate.

Contacts	View, edit, import, export.
Deals	Create, edit, link to contact.
Broadcasts	Create, schedule, cancel; view results.
Bot flows	Create, enable / disable, edit, delete.
AI	Use AI features; configure provider and budget (Owner-only by default).
Channels	Connect / disconnect channel lines, configure web chat widget.
Team	Invite members, change roles, suspend.
Reports	View per-agent / per-inbox / SLA / CSAT reports; export.
Subscription	View plan, submit payments, change plan.

Common pattern: a "billing-only" Manager.

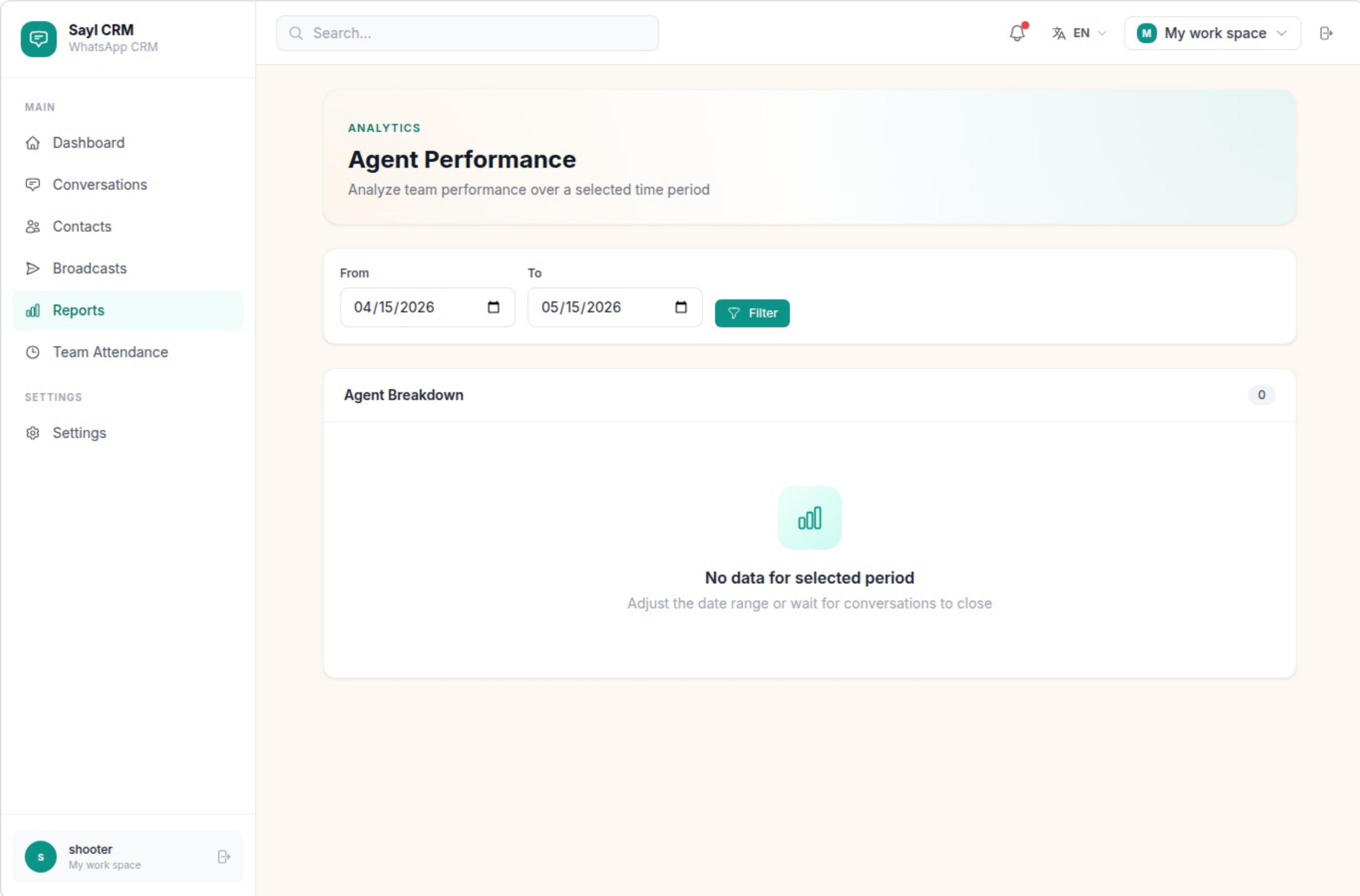
Sometimes the person who pays the bill isn't the person who runs operations. Invite them as Manager, then disable everything except *Subscription* and *Reports*. They get the invoices and the headline numbers; the team's day-to-day work isn't visible.

12. Reports and team attendance

The *Reports* menu has three views, each tailored for Managers.

Agent performance

For any date range, you see per-agent: conversations closed, average first-response time, SLA compliance percentage, and average customer satisfaction score (CSAT, when collected).



Agent Performance — pick a date range and see the per-agent breakdown. Empty state shows when no conversations have closed in the selected period.

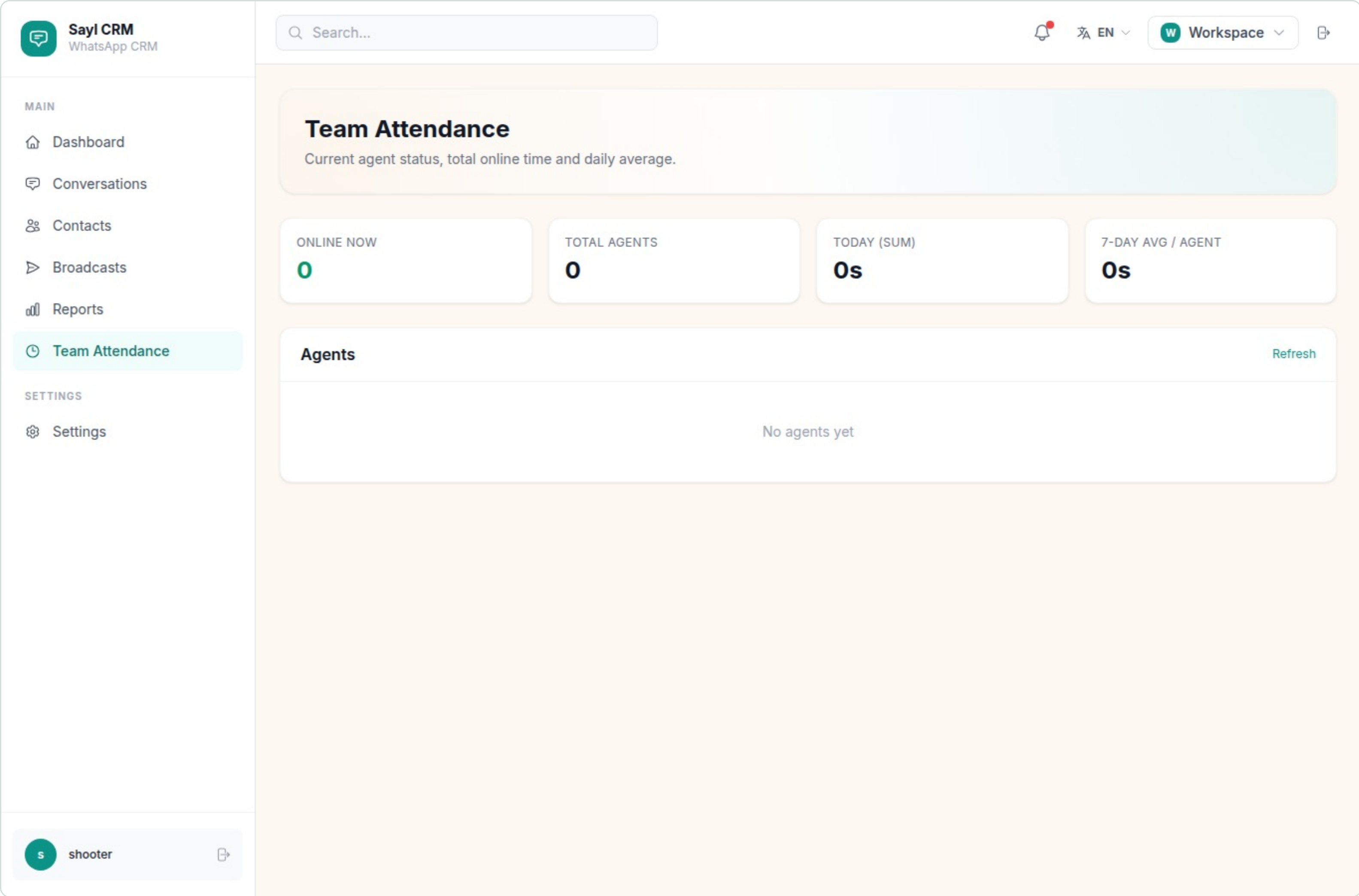
Inbox metrics

Aggregate numbers per inbox: queue depth, average wait time, peak hour, top tags, conversations closed by hour-of-day. Useful to decide whether an inbox is understaffed or whether a particular shift needs more coverage.

Team attendance

Open *Team Attendance* in the sidebar (Owner / Manager only). The page shows:

- A live online/offline indicator for every team member.
- Today's online time and a 7-day total per person.
- A daily bar chart for any agent over any range you pick.
- Schedule adherence — if the agent has a weekly schedule defined, you see the percentage of scheduled hours they were actually online.



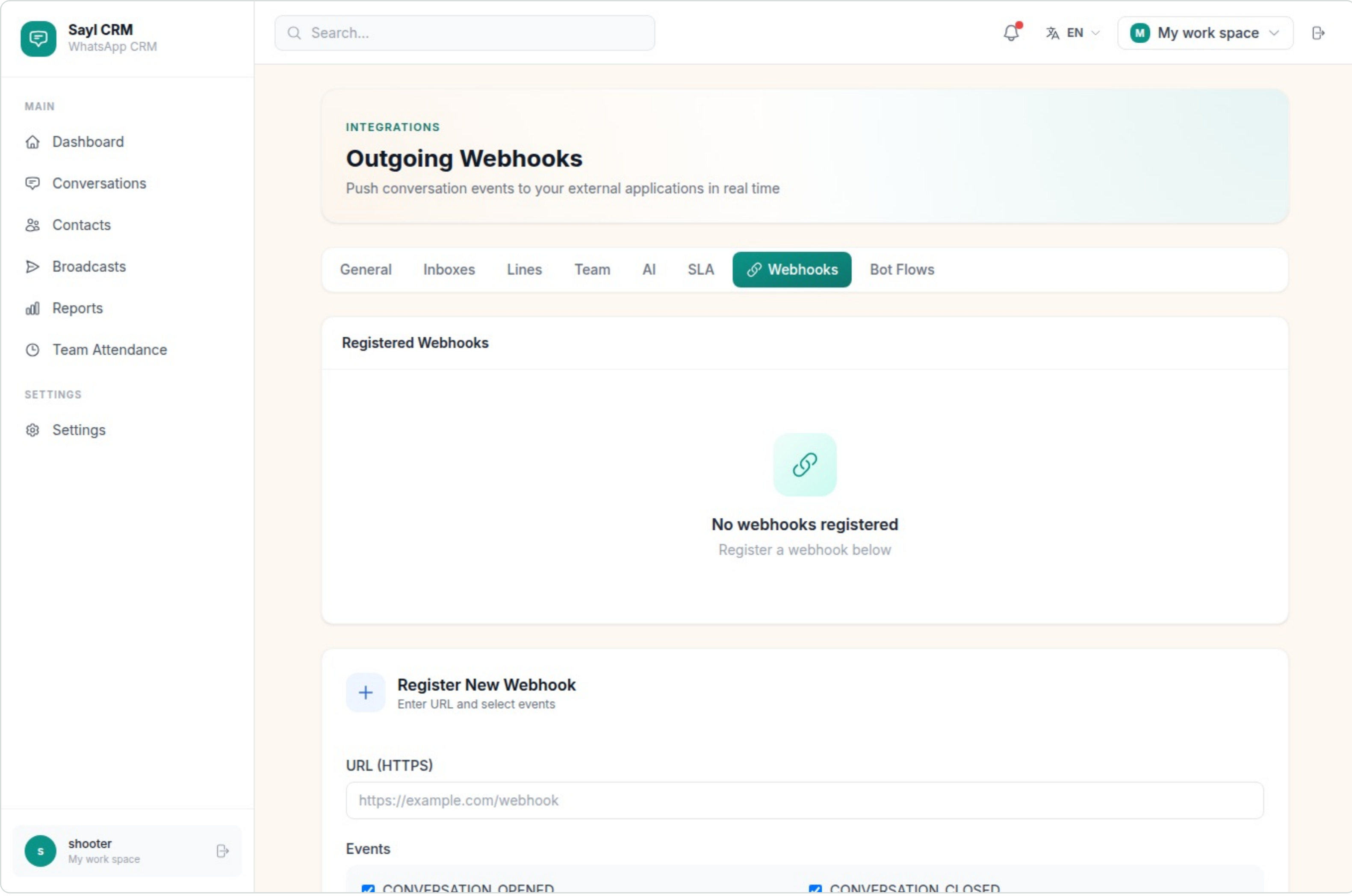
Team Attendance — live online count, total agents, today's combined online time and 7-day average, with the per-agent breakdown below.

Click any agent to drill into their detailed report. Use the *CSV / JSON / PDF* buttons to download for HR or payroll.

> **How "online" is measured.**
>
> An agent is counted as online whenever they have the inbox open in their browser — Sayl detects the live connection automatically. There's no clock-in / clock-out button, no extra app, no fudging. Idle browser tabs don't count: the SSE connection has to be active.

13. Outgoing webhooks (integrating with your systems)

If you already run a CRM, ERP or analytics warehouse, you'll want the conversations and contacts you collect in Sayl to flow back into them. Outgoing webhooks make that happen — every event you care about is POSTed to your URL the moment it happens.



Settings → Webhooks — register a URL, choose which events fire it, and Sayl signs every payload with HMAC-SHA256.

Events you can subscribe to

Event	Fires when…
`CONVERSATION_OPENED`	A new inbound conversation arrives.
`CONVERSATION_CLOSED`	An agent or auto-rule closes a conversation.
`CONVERSATION_ASSIGNED`	A conversation gets a new owner.
`MESSAGE_RECEIVED`	An inbound message lands.
`MESSAGE_SENT`	An agent's outbound message is accepted by the channel.
`CONTACT_CREATED`	A new contact is created (any channel).
`CONTACT_UPDATED`	A contact's pipeline stage, tags or profile changes.
`BROADCAST_COMPLETED`	A broadcast finishes sending; payload includes per-recipient stats.
`SLA_BREACHED`	An open conversation crosses the inbox's first-response SLA.

HMAC verification on your end

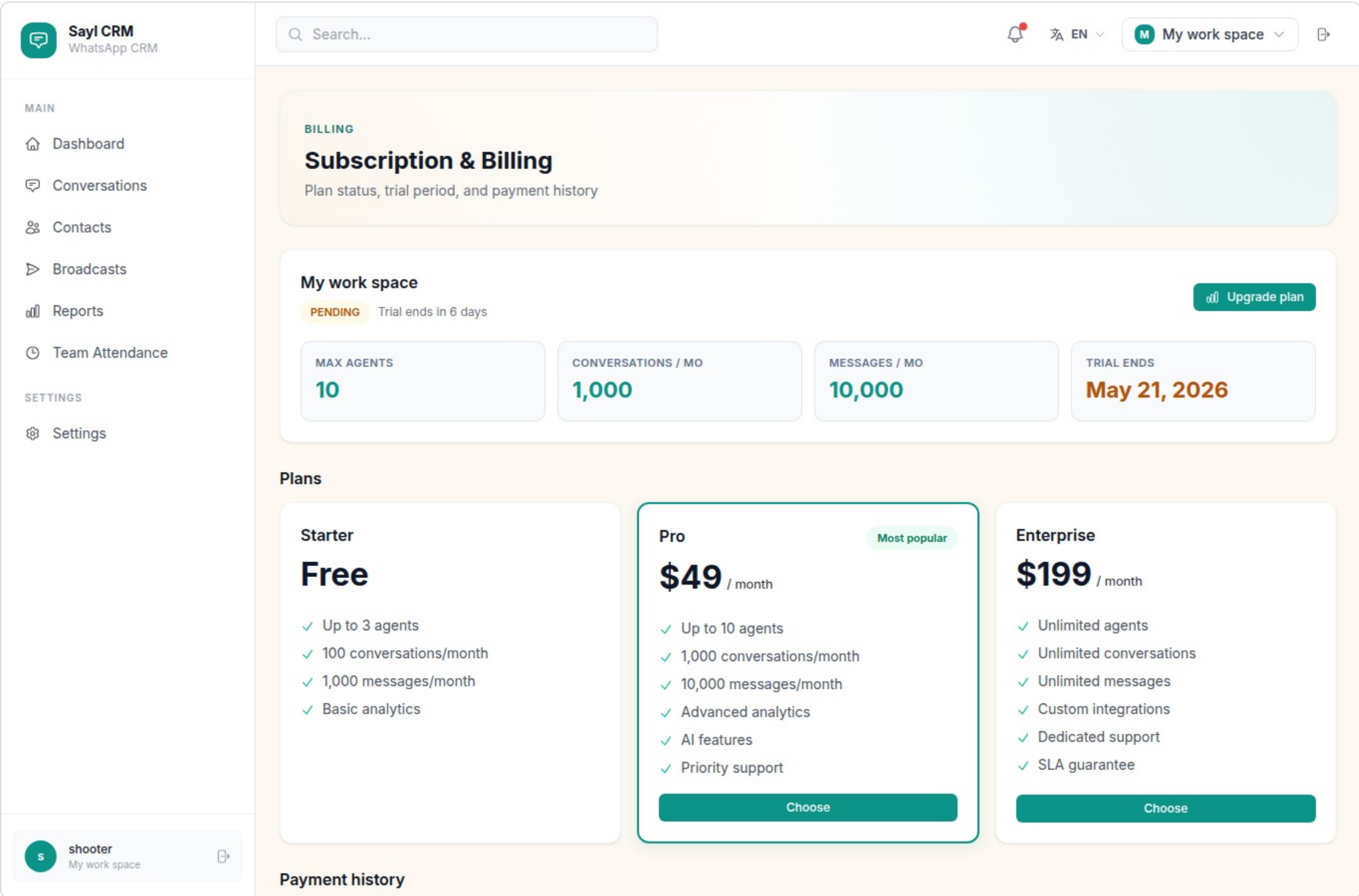
Every request includes an `X-Sayl-Signature: sha256=…` header. Compute the HMAC-SHA256 of the raw request body using your webhook secret and compare. Drop anything that doesn't match. The body is JSON; the signature is over the raw bytes, so don't re-serialize before checking.

Sayl retries with exponential back-off (1s, 5s, 30s, 5m, 1h) for any non-2xx response, and gives up after 5 hours. Failed deliveries are visible in the webhook log and can be replayed manually.

> **Why HMAC and not just an API key in a header?**
>
> An API key in a header is vulnerable if your endpoint logs request headers (most do). HMAC over the body proves Sayl wrote the payload *and* nobody modified it in transit, even if the signature was logged. Verifying takes 4 lines of code in any language.

14. Subscription and billing

Every new workspace starts on a 7-day free trial. To keep it after that, the Owner picks a plan from *Settings → Subscription*.



Settings → Subscription — plan status banner, usage limits, three tiers (Starter free, Pro, Enterprise) and payment history. Upgrade plan opens the manual-payment flow for Egyptian customers or redirects to LemonSqueezy for cards.

The three plans

Plan	Price	Best for	Includes
Starter	Free	Solo users testing the platform	3 agents · 100 conversations / mo · 1,000 messages / mo · basic analytics
Pro	$49 / mo	Most teams up to 10 agents	10 agents · 1,000 conversations / mo · 10,000 messages / mo · AI features · advanced analytics · priority support
Enterprise	$199 / mo	Larger teams, regulated industries, custom integrations	Unlimited agents / conversations / messages · custom integrations · dedicated support · SLA guarantee

Two payment methods

- **Card / international:** processed by LemonSqueezy. Subscriptions auto-renew monthly or annually until cancelled. Invoices and tax receipts download from your LemonSqueezy customer portal.
- **Egyptian local methods:** Instapay or Vodafone Cash. The subscription page lists the receiving accounts; send the payment, upload the screenshot, and our team approves it within one business day. Once approved, your workspace is reactivated. Screenshot uploads are MIME-checked with Apache Tika to reject anything that isn't a real image.

What happens at trial expiry

- You get email reminders 3 days, 1 day and on the morning of expiry.
- On expiry day, the workspace is locked: agents can read conversations and reports but can't send replies, broadcasts or change settings.
- Pay any time and reactivation is automatic. No data is deleted during the lockout.

Don't lose work to a forgotten renewal.
Add a finance owner as a Manager with billing-only permissions (see section 11) and they'll see the renewal warnings even if you're on holiday.

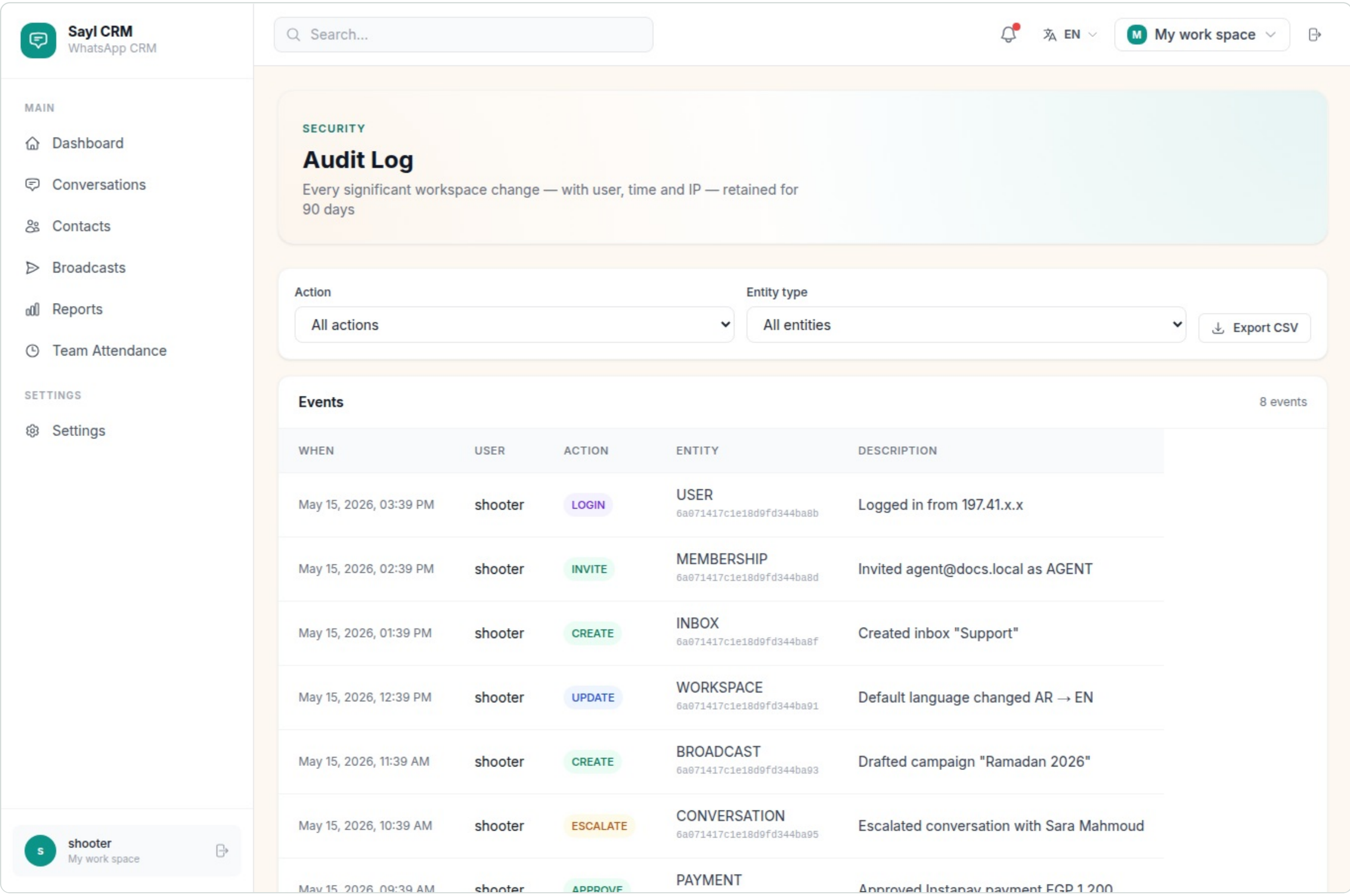
15. Security and data protection

Sayl is designed for teams who handle real customer data. The platform's defaults assume you take that seriously and want the platform to as well.

Layer	What's done
Encryption at rest	Every WhatsApp / Telegram / email / SMS access token, every AI provider key, every webhook secret is stored AES-256-GCM encrypted with a master key Sayl never logs. Reading the database directly does not give an attacker working credentials.
Encryption in transit	HTTPS only. HSTS is enabled with a 1-year max-age and `includeSubDomains` set, so once a browser has visited Sayl over HTTPS it refuses to fall back.
Tenant isolation	Every database query is scoped by the current workspace ID via a Spring filter. Cross-tenant access is impossible at the data layer; this is verified by the automated *TenantIsolationIT* integration test suite.
Brute-force protection	5 failed logins → 15-minute account lockout. The lockout is persisted in the database, so it survives a server restart.
Webhook signatures	Inbound Meta / Telegram / Twilio webhooks are HMAC-verified against the channel's secret. Outbound webhooks are signed with HMAC-SHA256 — your downstream systems can verify the same way.
CSP / frame-deny / referrer-policy	Every response carries Content-Security-Policy, X-Frame-Options: DENY, Referrer-Policy: strict-origin and a tight Permissions-Policy. The platform won't render inside an iframe — clickjacking is structurally blocked.
Audit log	Every significant action — login, suspend, role change, broadcast send, payment approval — is recorded with actor, target, timestamp and request IP. 90-day retention with TTL auto-expiry. Owners can export the log as CSV or JSON for compliance reviews.
Webhook replay defence	Inbound webhooks are deduplicated against an atomic in-memory cache so the same event isn't processed twice if Meta retries. Critical for "exactly once" downstream behaviour.
Voice messages	Audio is processed in memory for transcription and never written to disk. The transcript is what's stored.
OTP rate limiting	OTP send / verify endpoints are rate-limited per phone and per IP to stop spam toll-fraud.

The workspace audit log

Every notable event in the workspace is recorded. Owners and Managers can read the log at *Settings → Audit log* — it's a paginated, filterable view with one row per event.



Settings → Audit log — every significant event with timestamp, actor, action pill, entity affected and the IP it came from. Filter by action or entity type, or export to CSV for compliance review.

Column	What it tells you

When	Localised timestamp. The underlying record is UTC; the column renders in the viewer's locale.
User	The human who performed the action — or *System* for automated events (SLA breach detected, trial-warning email, scheduled broadcast started).
Action	One of `LOGIN`, `LOGOUT`, `CREATE`, `UPDATE`, `DELETE`, `INVITE`, `SUSPEND`, `ESCALATE`, `TRANSFER`, `APPROVE`, `REJECT`. Colour-coded for fast scanning.
Entity	Type and ID of the thing that changed (Conversation, Inbox, Membership, Webhook, …).
Description	Human-readable detail, e.g. *"Default language changed AR → EN"*.
IP	Where the action came from — useful when investigating suspicious activity.

Filter by action (e.g. show only `SUSPEND` events from the last week) or by entity type. Export the filtered view to CSV with one click — the export covers up to 1,000 most recent matching records, which is enough for a SOC 2 review or a regulator request.

> **Working with a customer's compliance team?**
>
> The data-flow diagram, the list of sub-processors (Meta, LemonSqueezy, optionally OpenAI / Anthropic / Gemini / Azure / Twilio / Mailgun), and a sample DPA can be requested from your account manager.

16. Tips, FAQ and troubleshooting

Keyboard shortcuts

Key	Action
`?`	Show all shortcuts on the current page.
`/` (in composer)	Open canned-response picker.
`@` (in composer or note)	Mention a teammate.
`Enter` / `Shift+Enter`	Send / new line.
`Ctrl+K`	Global search.
`j` / `k`	Next / previous conversation in the list.
`e`	Close the active conversation.
`n`	Switch composer to internal-note mode.

FAQ

Question	Answer
Can I delete a contact?	Contact archive yes, hard-delete no — to keep your conversation history intact and to comply with WhatsApp's data retention rules.
Can two agents reply to the same conversation at once?	The conversation is owned by one assigned agent at a time. Anyone with access can leave an internal note. To re-assign, click *Transfer*.
Are messages encrypted?	WhatsApp tokens, AI keys and any sensitive credentials are encrypted at rest with AES-256-GCM. Messages on the wire use HTTPS. Meta's end-to-end encryption applies between the customer and the Cloud API.
Can I use my own domain?	Yes — Sayl runs behind any HTTPS reverse proxy. Your DevOps team can point a sub-domain to the platform.
Is there a mobile app?	Not yet. The web app is fully responsive on phones and tablets, and we recommend Chrome or Safari.
How do I export everything if I leave?	Owners can export contacts, conversations and broadcast stats as CSV / JSON / PDF from each section's *Export* button.
Can a manager see another manager's conversations?	Yes — managers see everything in inboxes they belong to. Restrict the inbox membership if you need narrower visibility.
What happens if Meta rate-limits us?	Sayl's broadcast sender obeys the 80 msg/s cap by default. If Meta returns 429, Sayl backs off and resumes; the campaign isn't lost.
Can I bring my own phone number?	Yes. WhatsApp Business numbers can be brought from any provider — Sayl is one application; the number is yours.
Are tokens or AI keys ever shown in logs?	No. Sayl masks every credential before any log line is emitted, and audit-log entries reference credentials by ID, never by value.

Common issues

You see…	Try this
Messages not arriving	Re-check the WhatsApp webhook in Meta Business Manager — it should point at your Sayl URL with the correct verify token. The webhook log under *Settings → Webhooks → Logs* shows whether anything is reaching the server.
Replies sent but not delivered	The customer may have blocked your number. Check the delivery status icon under the message. Per-recipient failure reasons are visible in the broadcast / conversation export.
Locked out after failed logins	The lockout lasts 15 minutes. After that, log in normally. Owners can unlock a team member earlier from *Settings → Team*.
Broadcast paused mid-send	Usually means the WhatsApp template was rejected or the rate limit was hit. Check the broadcast detail page for the exact reason.
SSL warning in browser	Your reverse proxy isn't terminating HTTPS correctly. This is a server-side issue — talk to whoever set up the deployment.
"Your AI budget is exhausted"	The workspace's monthly token budget has been spent. Either raise the cap in *Settings → AI* or wait until the start of the next month.
Agent shows as offline despite being logged in	Their browser tab may be sleeping. Sayl uses an SSE keep-alive — sleeping tabs lose the connection. Reload the tab.

Getting more help

Press *?* anywhere in the platform to see contextual shortcuts. For deeper questions, your account manager has direct access to our engineering team.

Thanks for choosing Sayl CRM. We're rooting for your team.