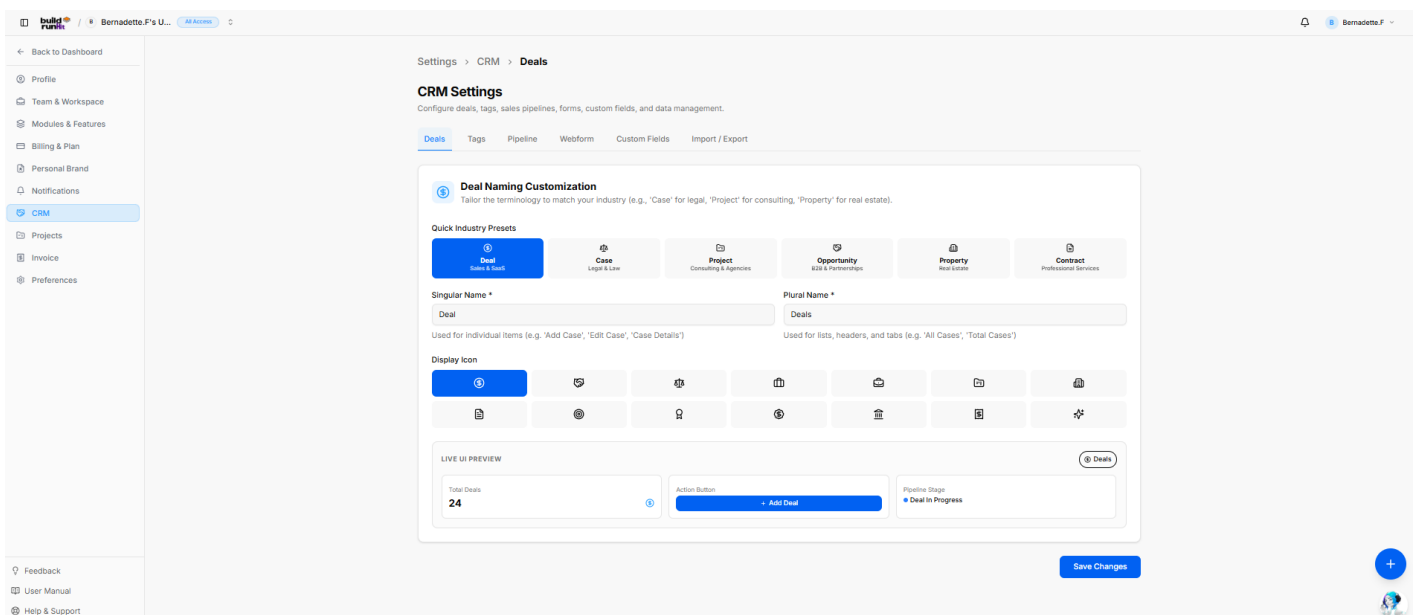


BuildRunKit CRM: Settings Dashboard Overview

BuildRunKit CRM: Settings Dashboard Overview



Top Header Navigation

- **Brand Logo:** BuildRunKit logo in top-left corner.
- **Workspace Selector:** Dropdown showing current workspace (*Bernadette.F's Workspace*) with access tier badge (*All Access*).
- **Top Right Actions:** Notification bell icon and user profile dropdown menu (*Bernadette.F*).

Left Navigation Sidebar

- **Back Control:** <- **Back to Dashboard** button to exit settings.
- **Account Settings Links:**
 - **Profile**
 - **Team & Workspace**

- **Modules & Features**
- **Billing & Plan**
- **Personal Brand**
- **Notifications**
- **Module Settings Links:**
 - **CRM** (Currently Active)
 - **Projects**
 - **Invoice**
 - **Preferences**
- **Bottom Sidebar Links:**
 - **Feedback**
 - **User Manual**
 - **Help & Support**

CRM Settings Header & Location Tracking

- **Breadcrumb Trail (Traction Navigation Path):** `Settings > CRM > Deals` — Tracks location within the settings hierarchy and provides click-back navigation paths.
- **Page Heading: CRM Settings**
- **Sub-description:** "Configure deals, tags, sales pipelines, forms, custom fields, and data management."

CRM Settings Navigation Tabs

- **Deals** (Active Tab)
- **Tags**
- **Pipeline**
- **Webform**
- **Custom Fields**
- **Import / Export**

Deals Tab Configuration Controls

- **Section Title: Deal Naming Customization**
- **Section Subtext:** "Tailor the terminology to match your industry (e.g., 'Case' for legal, 'Project' for consulting, 'Property' for real estate)."

- **Quick Industry Presets:**

- **Deal** (*Sales & SaaS*) — Selected
- **Case** (*Legal & Law*)
- **Project** (*Consulting & Agencies*)
- **Opportunity** (*B2B & Partnerships*)
- **Property** (*Real Estate*)
- **Contract** (*Professional Services*)

- **Singular Name ***: Input text field showing Deal (Helper text: *Used for individual items (e.g. 'Add Case', 'Edit Case', 'Case Details')*).

- **Plural Name ***: Input text field showing Deals (Helper text: *Used for lists, headers, and tabs (e.g. 'All Cases', 'Total Cases')*).

- **Display Icon**: 14 selectable icon choices to represent deals across the UI (Dollar symbol currently selected).

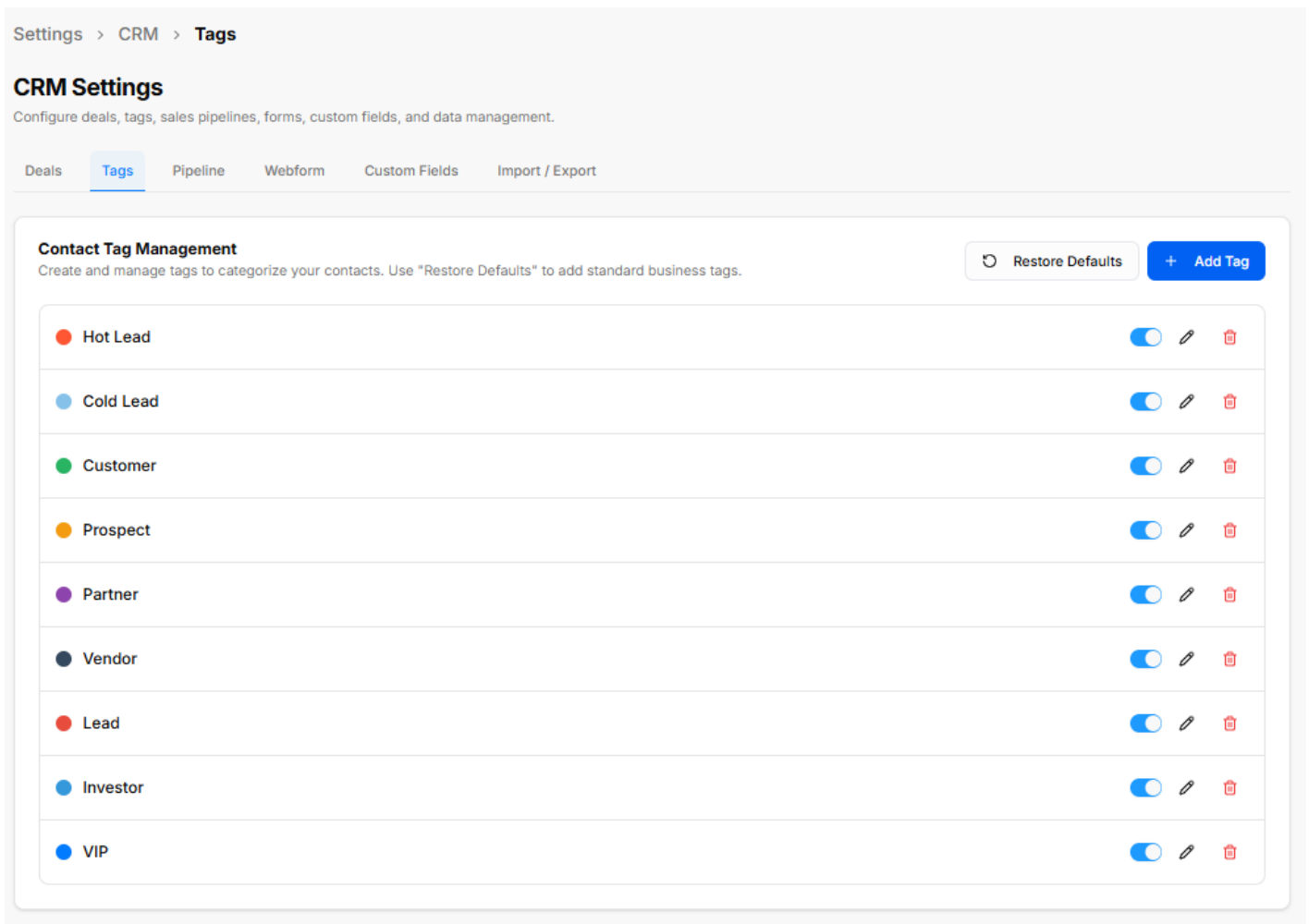
Live UI Preview Panel

- **Preview Tab Badge**: Shows top right button preview (Deals).
- **Total Deals Metric Card**: Preview showing 24 with dollar icon.
- **Action Button Preview**: Shows blue + Add Deal primary button.
- **Pipeline Stage Preview**: Shows stage badge with status dot (Deal In Progress).

Footer & Floating Actions

- **Save Changes**: Primary action button in the bottom right of the panel to apply configuration.
- **Floating Action Button**: Blue + button in bottom-right corner.
- **Support Widget**: AI assistant icon in bottom-right corner.

BuildRunKit CRM: CRM Settings - Tags Tab



Location & Header

- **Breadcrumb Trail (Traction Navigation Path):** Settings > CRM > Tags
- **Page Heading: CRM Settings**
- **Sub-description:** "Configure deals, tags, sales pipelines, forms, custom fields, and data management."
- **Active Tab: Tags**

Contact Tag Management Section

- **Section Header: Contact Tag Management**
- **Section Description:** "Create and manage tags to categorize your contacts. Use 'Restore Defaults' to add standard business tags."
- **Header Actions:**
 - **Restore Defaults:** Button to reset or populate default system tags.
 - **+ Add Tag:** Primary button to create a new contact category tag.

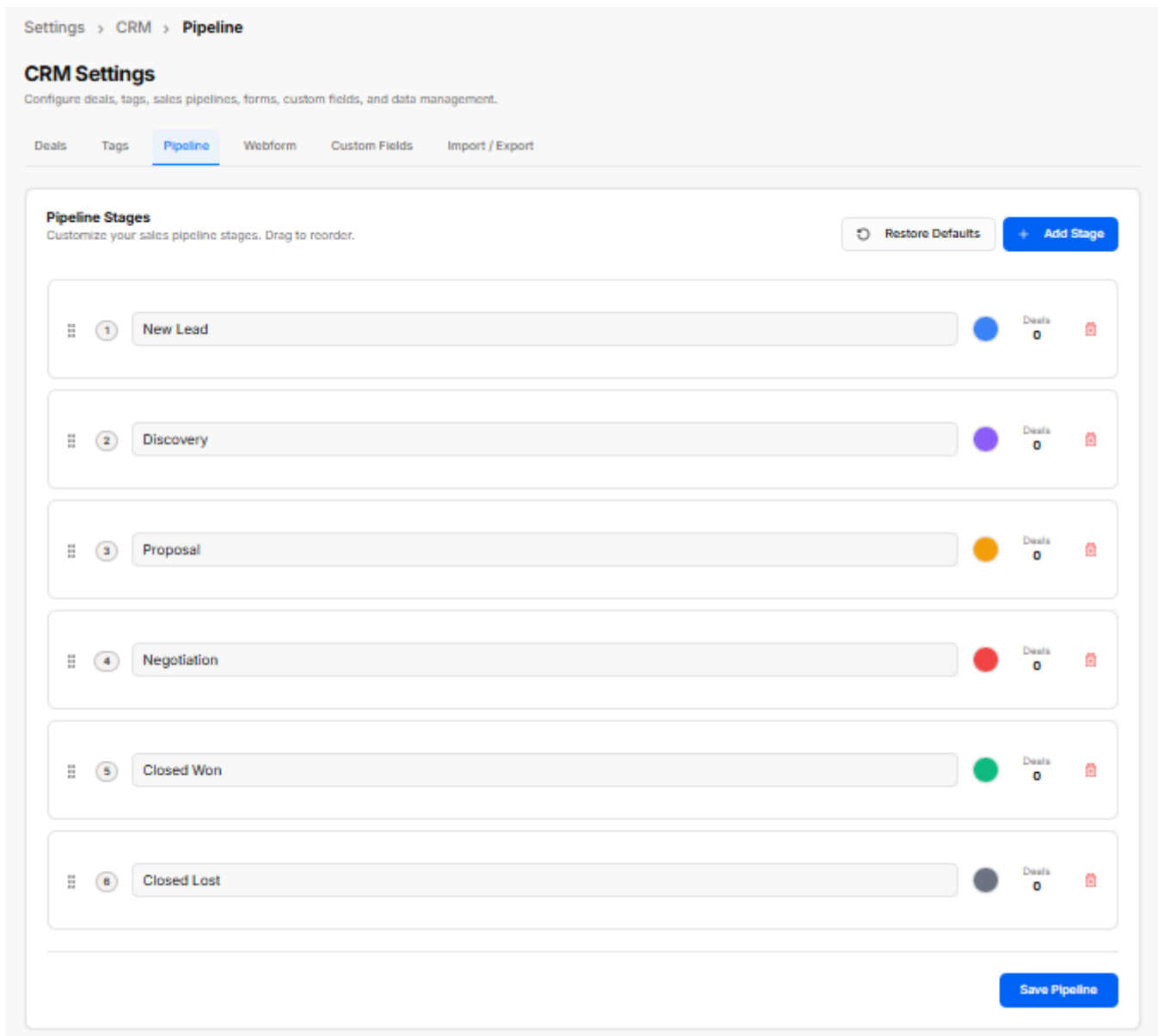
Default Tag List & Row Controls Each tag item displays a custom color badge, label name, and individual management toggles/actions:

- **Hot Lead** (Red Dot)
- **Cold Lead** (Light Blue Dot)
- **Customer** (Green Dot)
- **Prospect** (Orange Dot)
- **Partner** (Purple Dot)
- **Vendor** (Dark Navy Dot)
- **Lead** (Red Dot)
- **Investor** (Medium Blue Dot)
- **VIP** (Bright Blue Dot)

Row Action Icons (Right Side)

- **Active Toggle Switch:** Enables or disables the tag for contact categorization across the CRM.
- **Pencil Icon:** Edits the tag name or assigned color badge.
- **Trash Bin Icon:** Deletes the tag entry from the system.

BuildRunKit CRM: CRM Settings - Pipeline Tab



Location & Header

- **Breadcrumb Trail (Traction Navigation Path):** Settings > CRM > Pipeline
- **Page Heading: CRM Settings**
- **Sub-description:** "Configure deals, tags, sales pipelines, forms, custom fields, and data management."
- **Active Tab: Pipeline**

Pipeline Stages Section

- **Section Header: Pipeline Stages**
- **Section Description:** "Customize your sales pipeline stages. Drag to reorder."
- **Header Actions:**

- **Restore Defaults:** Button to reset stage order, names, and color coding to default presets.
- **+ Add Stage:** Primary button to append a new stage to the sales process.

Configured Stages & Controls Each stage row includes drag-and-drop handles, sequence numbering, text customization, status colors, deal counters, and delete actions:

- **Stage 1: New Lead** (Blue Circle Dot | Deals Count: 0)
- **Stage 2: Discovery** (Purple Circle Dot | Deals Count: 0)
- **Stage 3: Proposal** (Orange Circle Dot | Deals Count: 0)
- **Stage 4: Negotiation** (Red Circle Dot | Deals Count: 0)
- **Stage 5: Closed Won** (Green Circle Dot | Deals Count: 0)
- **Stage 6: Closed Lost** (Grey Circle Dot | Deals Count: 0)

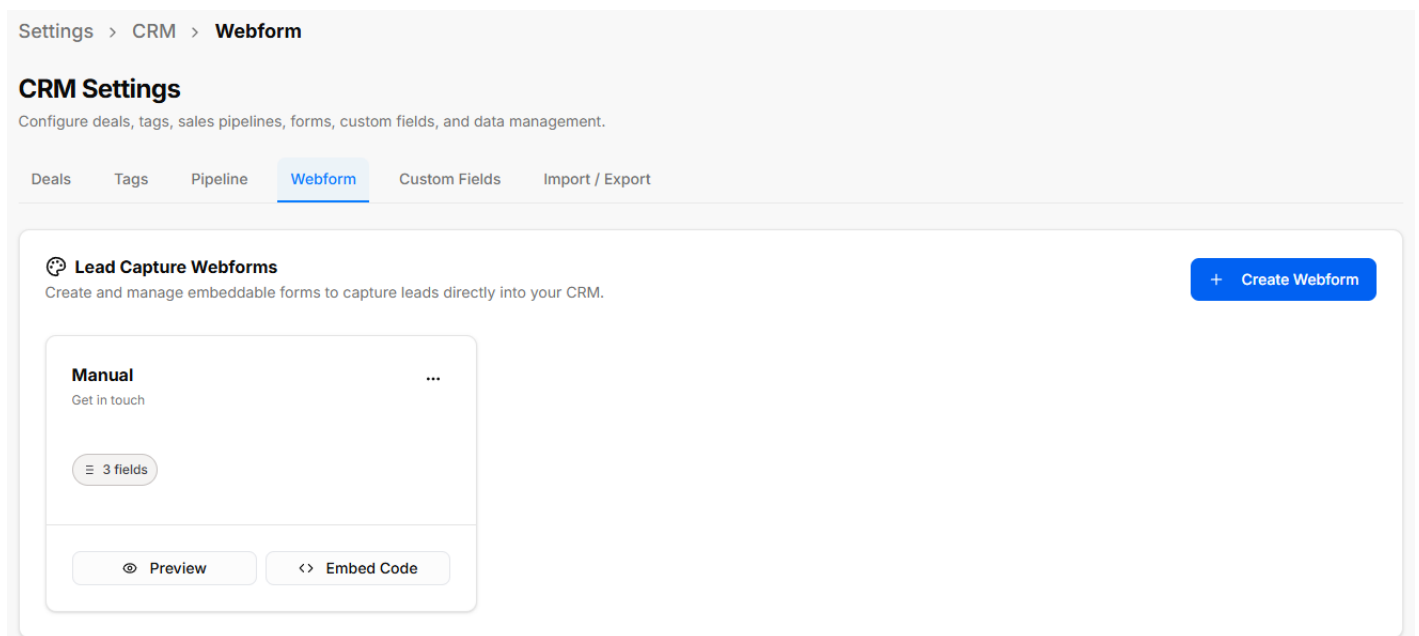
Row Control Elements

- **Drag Handle** (): Reorders the stage position in the Kanban sequence.
- **Sequence Badge:** Displays the numerical step order (1 through 6).
- **Stage Name Field:** Editable text box to update stage titles.
- **Color Picker Circle:** Assigns custom badge colors for Kanban board identification.
- **Deals Counter:** Tracks the number of open deals currently sitting in that stage.
- **Trash Bin Icon:** Removes the selected stage row.

Footer Actions

- **Save Pipeline:** Primary action button located at the bottom right to apply all pipeline structural changes across the CRM.

BuildRunKit CRM: CRM Settings - Webform Tab



Location & Header

- **Breadcrumb Trail (Traction Navigation Path):** Settings > CRM > Webform
- **Page Heading: CRM Settings**
- **Sub-description:** "Configure deals, tags, sales pipelines, forms, custom fields, and data management."
- **Active Tab: Webform**

Lead Capture Webforms Section

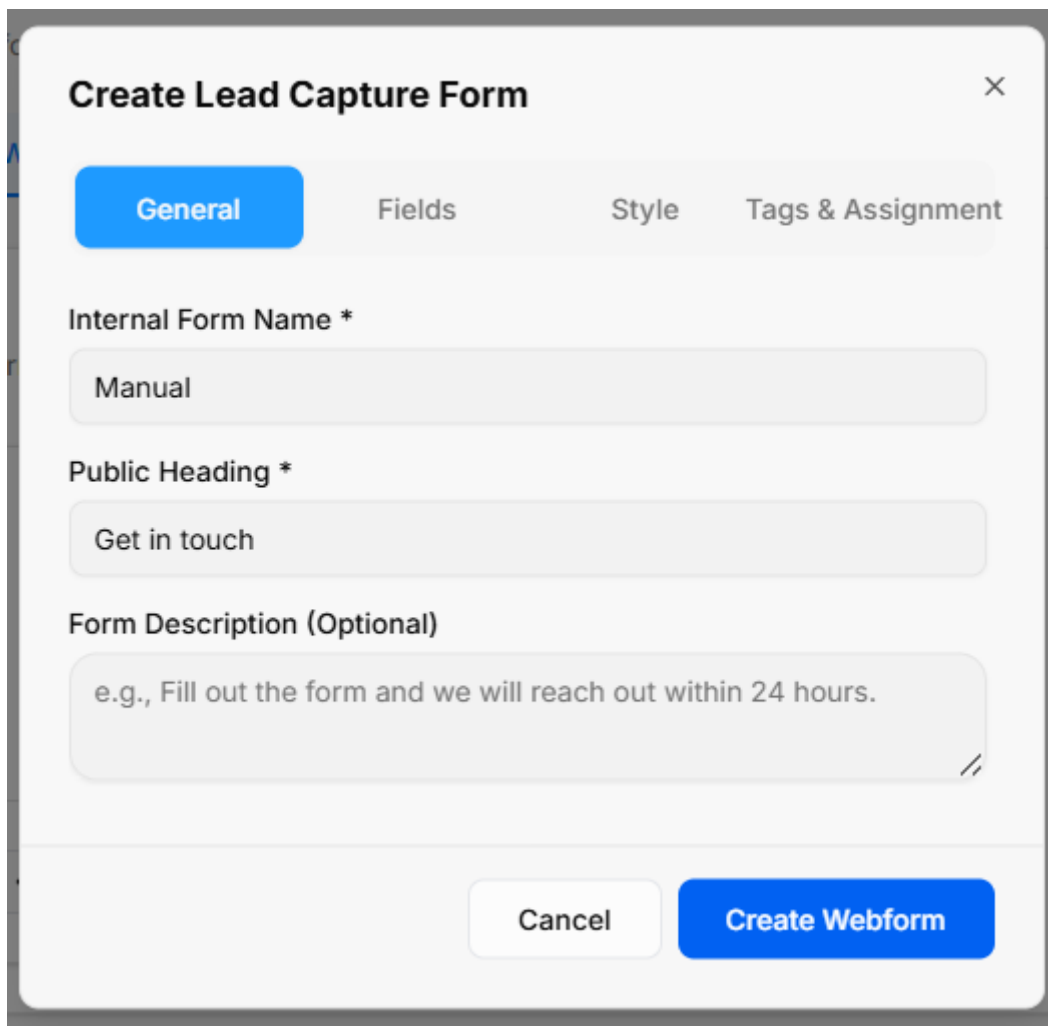
- **Section Header: Lead Capture Webforms**
- **Section Description:** "Create and manage embeddable forms to capture leads directly into your CRM."
- **Header Actions:**
 - **+ Create Webform:** Primary button to open the webform creation wizard.

Configured Webform Cards Saved lead capture forms display as individual summary cards with the following details and controls:

- **Form Title & Subheading:** Displays the internal form name (e.g., *Manual*) and the public heading (e.g., *Get in touch*).
- **Card Action Menu (...):** Context menu containing options to **Edit Webform** or **Delete**

- **Field Counter Badge:** Displays the total number of configured input fields (e.g., `3 fields`).
- **Card Quick Actions:**
 - **Preview:** Launches a modal showing the live public layout of the form.
 - **Embed Code:** Generates code snippets for website embedding.

Create Lead Capture Form Wizard



The screenshot shows a modal window titled "Create Lead Capture Form" with a close button (X) in the top right corner. The modal has four tabs: "General" (selected and highlighted in blue), "Fields", "Style", and "Tags & Assignment". Under the "General" tab, there are three text input fields: "Internal Form Name *" with the value "Manual", "Public Heading *" with the value "Get in touch", and "Form Description (Optional)" with the value "e.g., Fill out the form and we will reach out within 24 hours.". At the bottom of the modal, there are two buttons: "Cancel" and "Create Webform" (highlighted in blue).

Clicking + **Create Webform** (or selecting **Edit Webform**) opens the multi-tab setup modal:

1. General Tab

- **Internal Form Name ***: Required text field for internal workspace identification (e.g., *Manual*).
- **Public Heading ***: Required text field for the main title displayed to website visitors (e.g., *Get in touch*).

- **Form Description (Optional):** Multi-line text field for visitor instructions (e.g., *Fill out the form and we will reach out within 24 hours.*).

2. Fields Tab

- **Active Form Fields:** Managed list of fields currently enabled on the form (e.g., *First Name, Last Name, Email*).
- **Available Contact Fields:** System fields that can be individually toggled on or off:
 - *First Name*
 - *Last Name*
 - *Email Address*
 - *Phone Number*
 - *Company*
 - *Address*
 - *Job Title*
 - *Message*

3. Style Tab

- **Background Color:** Color picker to set the main container background.
- **Text Color:** Color picker to set the typography shade.
- **Submit Button Text:** Custom text field for the call-to-action button (e.g., *Submit, Send Message*).
- **Button Background Color:** Color picker to set the primary button color.
- **Button Text Color:** Color picker to adjust text contrast inside the submit button.

4. Tags & Assignment Tab

- **Automatic Lead Processing:** Automatically assigns tags and team owners upon submission.
- **Associate Contact Tags:** Multi-select choices using active global tags (*Hot Lead, Cold Lead, Customer, Prospect, Partner, Vendor, Lead, Investor, VIP*).
- **Create Tag Action:** Inline shortcut button to create a new category tag directly from this tab.

- **Default Lead Owner:** Dropdown selector to automatically assign newly captured leads to a designated team member.

Wizard Modal Actions

- **Cancel:** Discards changes and exits the modal.
- **Create Webform / Save Changes:** Saves the setup and generates/updates the lead capture form.

BuildRunKit CRM: CRM Settings - Custom Fields Tab

Settings > CRM > Custom Fields

CRM Settings

Configure deals, tags, sales pipelines, forms, custom fields, and data management.

DealsTagsPipelineWebformCustom FieldsImport / Export

Custom Fields

Define custom attributes for contacts and deals.

Contact (1)

Deal (0)

Search...

Label	Type	Order	Actions
Manual	Input	↑ ↓	✎ 🗑

+ Add Custom Field

Location & Header

- **Breadcrumb Trail (Traction Navigation Path):** Settings > CRM > Custom Fields
- **Page Heading:** CRM Settings
- **Sub-description:** "Configure deals, tags, sales pipelines, forms, custom fields, and data management."
- **Active Tab:** Custom Fields

Custom Fields Management Section

- **Section Header:** Custom Fields

- **Section Description:** "Define custom attributes for contacts and deals."
- **Header Actions:**
 - **+ Add Custom Field:** Primary button to open the field creation modal.
- **Module Scope Switches:**
 - **Contact (Count):** Switch to view and manage attributes applied to client contact records (e.g.,).
 - **Deal (Count):** Switch to view and manage attributes applied to sales opportunities (e.g.,).
- **Search Field:** Text input () to quickly filter created fields by label.

Custom Fields Data Table

- **Label:** Display title of the field (e.g., *Manual*).
- **Type:** Input format assigned to the field (e.g., *Input*).
- **Order:** Up/Down arrow buttons () to reorder field positioning on record forms.
- **Actions:**
 - **Pencil Icon:** Edits existing field label, placeholder, or options.
 - **Trash Bin Icon:** Deletes the custom field attribute.

Add / Edit Custom Field Modal

Add Custom Field ×

Create a custom field including types, input kind, and select a form.

Applies To * **Field Type ***

Contact Text Input

Field Label *

e.g., Target Demographic

Placeholder

e.g., Enter target demographic...

Cancel Save

Clicking + **Add Custom Field** opens a modal to configure tailored data fields:

- **Modal Header: Add Custom Field**
- **Modal Description:** "Create a custom field including types, input kind, and select a form."
- **Applies To *:** Dropdown selector to choose the target record type (*Contact* or *Deal*).
- **Field Type *:** Dropdown selector to define input behavior:
 - *Text Input*
 - *Long Text*
 - *Number*
 - *Date Picker*
 - *Dropdown Select*
 - *Checkbox*
 - *Switch*
 - *Radio Group*
 - *Color*
- **Field Label *:** Required text field for the visible field title (e.g., *Target Demographic*).

- **Placeholder:** Text field for prompt text inside empty inputs (e.g., *Enter target demographic...*).
- **Modal Actions:**
 - **Cancel:** Discards changes and closes modal.
 - **Save:** Stores and deploys the custom field across selected records.

BuildRunKit CRM: CRM Settings - Import / Export Tab

Settings > CRM > Import / Export

CRM Settings

Configure deals, tags, sales pipelines, forms, custom fields, and data management.

Deals Tags Pipeline Webform Custom Fields Import / Export

CRM Import & Export

Export CRM Data

Choose what to export. You can select multiple types and optionally filter by a tag. Files are packaged as a ZIP archive.

What do you want to export?

☒ Deselect All

☒ Contacts
☒ Deals
☒ Pipeline Stages
☒ Tasks
☒ Activities

☐ Filter by Tag

Download Data

Import Data

Import contacts, deals, tasks, activities, and notes from CSV files.



Upload Files

Location & Header

- **Breadcrumb Trail (Traction Navigation Path):** Settings > CRM > Import / Export
- **Page Heading:** CRM Settings
- **Sub-description:** "Configure deals, tags, sales pipelines, forms, custom fields, and data management."
- **Active Tab:** Import / Export

CRM Import & Export Dashboard

The dashboard provides side-by-side modules for exporting system backups and importing bulk data:

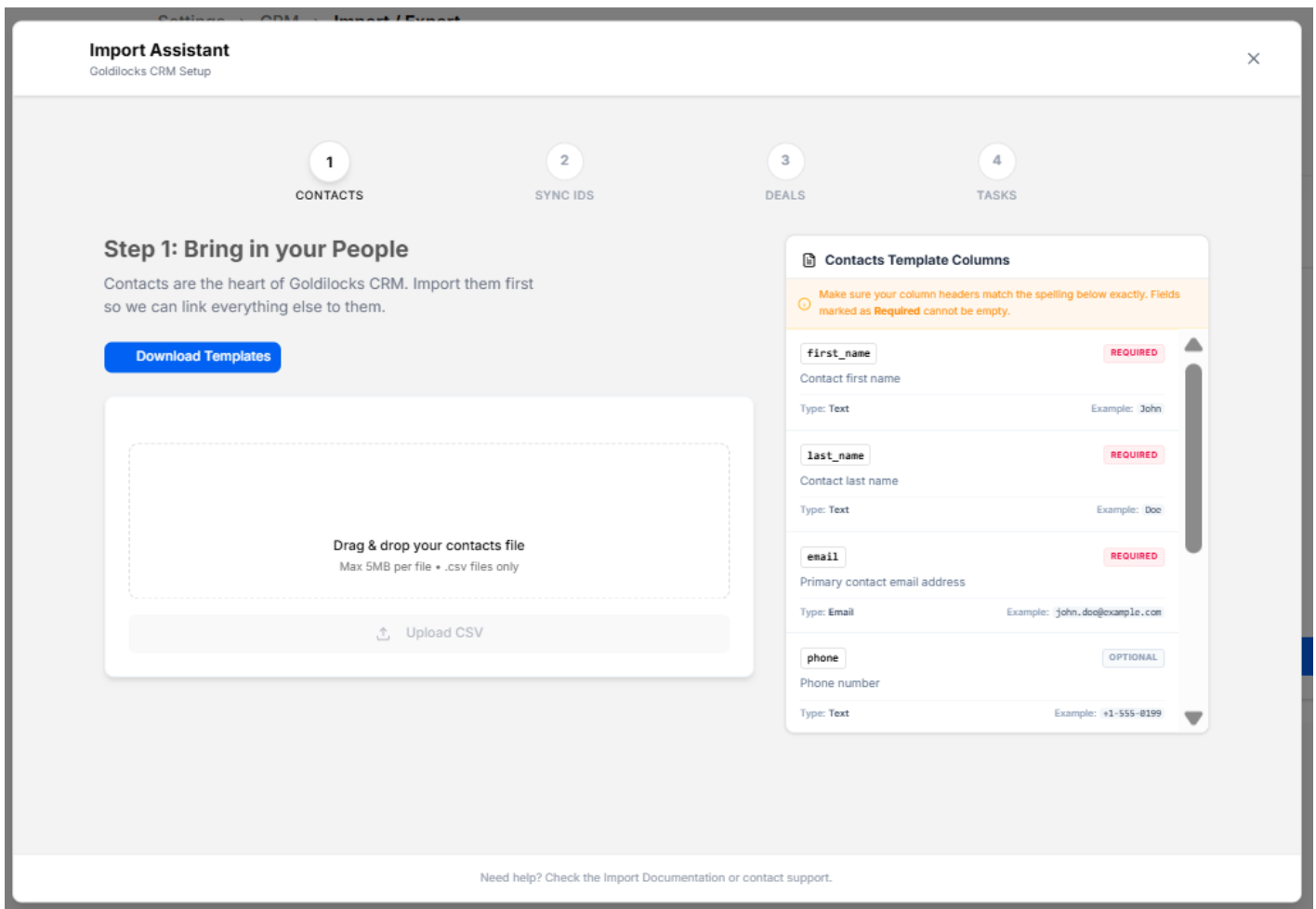
- **Export CRM Data Panel:**

- **Description:** "Choose what to export. You can select multiple types and optionally filter by a tag. Files are packaged as a ZIP archive."
- **Select All / Deselect All Toggle:** Master checkbox to select or deselect all record categories.
- **Export Categories Checkboxes:** Selectable data sets (*Contacts, Deals, Pipeline Stages, Tasks, Activities*).
- **Filter by Tag Checkbox:** Optional toggle to scope exports to specific contact tags.
- **Download Data Button:** Primary action button to generate and export the compressed ZIP archive.

- **Import Data Panel:**

- **Description:** "Import contacts, deals, tasks, activities, and notes from CSV files."
- **Upload Files Button:** Primary action button to open the step-by-step **Import Assistant** modal.

Import Assistant Wizard



Clicking **Upload Files** launches the 4-step guided import tool:

Progress Indicator Steps

1. **CONTACTS** (Currently Active)
2. **SYNC IDS**
3. **DEALS**
4. **TASKS**

Step 1: Bring in your People Panel

- **Heading & Subtext:** "Step 1: Bring in your People — Contacts are the heart of Goldilocks CRM. Import them first so we can link everything else to them."
- **Download Templates Button:** Downloads pre-formatted CSV template files to ensure correct column matching.
- **File Drag & Drop Zone:** Target area supporting file uploads up to 5MB per file (`.csv` files only).
- **Upload CSV Button:** Primary button to select and process local `.csv` files.

Contacts Template Columns Reference Sidebar A reference guide detailing exact column mapping requirements:

- **Notice Callout:** "Make sure your column headers match the spelling below exactly. Fields marked as Required cannot be empty."
- **Field Schema List:**
 - `first_name` **(REQUIRED)**: Contact first name | Type: Text | Example: *John*
 - `last_name` **(REQUIRED)**: Contact last name | Type: Text | Example: *Doe*
 - `email` **(REQUIRED)**: Primary contact email address | Type: Email | Example: *john.doe@example.com*
 - `phone` **(OPTIONAL)**: Phone number | Type: Text | Example: *+1-555-0199*

Footer Link

- **Documentation Access:** "Need help? Check the Import Documentation or contact support."