

# SOMBI Setup Guide

SOMBI

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# SOMBI

THE NEXT LEVEL SALES, OPERATIONS & MARKETING ASSISTANT



# The SOMBI Mindset

The SOMBI Mindset is more than just using an AI-powered platform—it's a philosophy for modern entrepreneurs, teams, and businesses who want to thrive in the digital age. It's about combining intelligence, efficiency, and proactive action to create lasting results.

## 1. Think Smart, Act Fast

At the core of the SOMBI Mindset is **strategic thinking**. It's not just about working harder—it's about working smarter. You identify opportunities, anticipate challenges, and use data-driven insights to make fast, effective decisions. SOMBI helps you stay informed and proactive, giving you a competitive edge.

## 2. Automate with Purpose

Automation is not just a tool; it's a mindset. The SOMBI Mindset embraces the power of AI to **streamline repetitive tasks**, free up time, and reduce errors. Whether it's handling customer messages, managing sales funnels, or running marketing campaigns, you focus on value while SOMBI handles the execution.

## 3. Focus on Results, Not Busy Work

The SOMBI Mindset is outcome-oriented. It's about **prioritizing high-impact actions** that drive growth, revenue, and customer satisfaction. Every decision, task, and process is measured by its contribution to meaningful results.

## 4. Adapt and Evolve

Digital transformation moves fast, and the SOMBI Mindset is about **adaptability**. You embrace change, learn continuously, and integrate new tools, methods, and strategies to stay ahead. The mindset treats challenges as opportunities to innovate.

## 5. Empowerment Through AI

SOMBI is your digital partner, but the mindset is yours. By leveraging AI effectively, you can **focus on creativity, strategy, and human connection**, while SOMBI manages operational tasks. This creates exponential leverage, allowing you to scale without being overwhelmed.

## 6. Consistency and Discipline

True growth requires consistency. The SOMBI Mindset encourages **daily disciplined actions**, smart planning, and regular monitoring of outcomes. Automation ensures that nothing falls through the cracks, while your focus stays on scaling and improving.

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**In short:** The SOMBI Mindset is about combining **intelligence, automation, and action** to unlock growth. It's a mindset that says: *work smarter, automate what you can, focus on high-impact results, adapt continuously, and scale without limits.*

# The SOMBI Strategy

The **SOMBI Strategy** is the actionable blueprint for using AI to grow your business efficiently, improve customer experiences, and scale operations without adding unnecessary complexity. It's designed to align people, processes, and technology in a way that produces measurable results.

## 1. Map Your Business Processes

Before implementing automation, understand your workflows:

- Identify repetitive tasks (messages, follow-ups, payments, reporting).
- Highlight bottlenecks and inefficiencies.
- Define key performance metrics for each process.

**Goal:** Know exactly where automation can create the most impact.

## 2. Automate Repetitive Tasks

Leverage SOMBI to handle tasks that take time but add limited strategic value:

- Customer support messages and FAQs
- Sales follow-ups and lead nurturing
- Appointment scheduling and reminders
- Marketing campaigns (emails, SMS, social media posts)

**Goal:** Free your team to focus on high-value activities while ensuring operational consistency.

## 3. Centralize Data and Insights

SOMBI collects and organizes information from all touchpoints:

- Customer interactions (CRM integration)
- Sales performance
- Marketing campaign analytics
- Operational KPIs

**Goal:** Have a single source of truth to make faster, smarter decisions.

## 4. Optimize Engagement and Conversion

Use SOMBI to create **personalized, timely, and intelligent** engagement:

- Automated but human-like responses
- Smart recommendations and upsells
- Lead scoring to prioritize high-potential opportunities

**Goal:** Increase customer satisfaction, retention, and sales efficiency.

## 5. Scale Operations Without Adding Overhead

Once processes are automated and optimized, scaling becomes straightforward:

- Expand campaigns and sales efforts with minimal manual effort

- Manage growing customer volumes without extra staff
- Launch new products, services, or channels quickly

**Goal:** Grow revenue and impact while keeping costs under control.

## 6. Continuously Monitor and Improve

SOMBI isn't set-and-forget:

- Track results in real-time dashboards
- Identify areas for improvement and adjust automation flows
- A/B test messaging, campaigns, and processes for maximum performance

**Goal:** Maintain a cycle of continuous improvement and business intelligence.

# SOMBI Systems & Tools:

The SOMBI platform is more than just AI—it's an ecosystem of integrated systems and tools designed to help businesses automate, optimize, and scale operations efficiently. Each system focuses on a key area of business, allowing you to manage everything from one central platform.

## 1. Dashboard & Analytics

- **Purpose:** Central hub for insights, tracking, and decision-making.
- **Features:**
  - Real-time KPIs (sales, leads, customer engagement)
  - Task and performance tracking
  - Alerts for important updates
- **Benefit:** See the health of your business at a glance.

## 2. Conversations & Messaging

- **Purpose:** Streamline communication with customers and leads.
- **Tools:**
  - AI-powered chatbots for instant replies
  - Multi-channel messaging (WhatsApp, email, SMS, social media)
  - Conversation history and context tracking
- **Benefit:** Respond faster, reduce missed leads, and improve customer experience.

## 3. Calendar & Appointments

- **Purpose:** Organize meetings, coaching sessions, or calls automatically.
- **Features:**
  - Automated scheduling with time zone recognition
  - Reminders and follow-ups
  - Integration with personal and team calendars
- **Benefit:** Save time and eliminate double-booking.

## 4. Contacts & CRM

- **Purpose:** Manage leads, clients, and business relationships.
- **Tools:**
  - Contact segmentation
  - Lead scoring and tracking
  - Interaction history
- **Benefit:** Prioritize high-value leads and maintain strong relationships.

## 5. Opportunities & Sales Management

- **Purpose:** Track potential deals and revenue pipelines.
- **Features:**
  - Sales pipeline visualization
  - Automated follow-ups
  - Revenue projections
- **Benefit:** Close more deals faster with better pipeline visibility.

## 6. Payments & Billing



- **Purpose:** Simplify transactions and invoicing.
- **Tools:**
  - Payment tracking and reminders
  - Automated invoicing
  - Integration with multiple payment gateways
- **Benefit:** Reduce payment delays and improve cash flow.

## 7. AI Agents & Automation

- **Purpose:** Automate tasks and processes across the platform.
- **Features:**
  - AI-driven workflows for marketing, support, and operations
  - Task delegation and follow-up automation
  - Customizable automation sequences
- **Benefit:** Save time, reduce human error, and scale efficiently.

## 8. Marketing & Campaigns

- **Purpose:** Manage digital marketing efforts from one place.
- **Tools:**
  - Email, SMS, and social media campaigns
  - Automation triggers based on behavior
  - Analytics to optimize campaigns
- **Benefit:** Increase reach, engagement, and conversion rates.

## 9. Sites & Memberships

- **Purpose:** Build and manage websites, landing pages, and online courses.
- **Features:**
  - Drag-and-drop website builder
  - Membership management
  - Digital course hosting
- **Benefit:** Create a professional online presence quickly.

## 10. Media Storage & File Management

- **Purpose:** Keep your digital assets organized and accessible.
- **Tools:**
  - Centralized media library
  - Secure file storage and sharing
  - Version control for documents
- **Benefit:** Save time searching for files and keep content organized.

## 11. Reputation & Reviews

- **Purpose:** Monitor and manage online reputation.
- **Features:**
  - Collect customer reviews
  - Respond automatically to feedback
  - Reputation score tracking
- **Benefit:** Improve trust and attract more customers.

## 12. Reporting & Insights

- **Purpose:** Make data-driven decisions.

- **Tools:**
  - Customizable reports
  - Performance dashboards
  - Trend analysis and forecasting
- **Benefit:** Understand what's working and optimize continuously.

## 13. Mobile App

- **Purpose:** Access your business anywhere.
- **Features:**
  - Manage conversations, tasks, and appointments on the go
  - Real-time notifications
  - Quick access to dashboards
- **Benefit:** Stay productive even when away from your desk.

## 14. Webinars & Digital Courses

- **Purpose:** Engage audiences and monetize knowledge.
- **Tools:**
  - Webinar hosting with registration and reminders
  - Digital course creation and management
  - Integration with membership systems and CRM
- **Benefit:** Grow your audience, train teams, and generate revenue digitally.

# Dashboard

## SOMBI Dashboard: Your Command Center for Business

The SOMBI Dashboard is the heart of the platform—a centralized command center where you can monitor, manage, and optimize your entire business in real time. It's designed to give you a clear overview of operations, performance, and opportunities, so you can make faster, smarter decisions.

### 1. Centralized Overview

- **Purpose:** See your entire business at a glance.
- **Features:**
  - Key performance indicators (KPIs) for sales, leads, customer engagement, and marketing campaigns
  - Real-time updates on tasks, appointments, and messages
  - Alerts for urgent actions or missed opportunities
- **Benefit:** Stay on top of your business without switching between multiple apps or systems.

### 2. Customizable Widgets

- **Purpose:** Tailor the dashboard to your specific needs.
- **Features:**
  - Drag-and-drop widgets for metrics you care about most
  - Visual charts, graphs, and tables for quick insights
  - Option to monitor team performance, revenue trends, or campaign results
- **Benefit:** Focus on what matters most to your business at any given time.

### 3. Real-Time Insights

- **Purpose:** Make data-driven decisions instantly.
- **Features:**
  - Live updates from all integrated SOMBI systems
  - Notifications on new leads, payments, and customer interactions
  - Quick drill-downs to see detailed information behind any metric
- **Benefit:** React quickly to opportunities or issues before they escalate.

### 4. Performance Tracking

- **Purpose:** Monitor progress and measure success.
- **Features:**
  - Track leads, conversions, sales pipelines, and revenue performance
  - Team productivity and task completion metrics
  - Marketing campaign analytics in one place
- **Benefit:** Identify strengths, weaknesses, and areas for improvement to optimize results.

### 5. Integration Hub

- **Purpose:** Connect all your tools seamlessly.
- **Features:**
  - Access contacts, calendars, opportunities, AI agents, and more from the dashboard
  - Single point of interaction for multiple workflows

- Quick navigation to deeper functions in SOMBI without losing context
- **Benefit:** Save time and increase efficiency by managing everything from one central interface.

## 6. User-Friendly Design

- **Purpose:** Simplify complex data and operations.
  - **Features:**
    - Clean, intuitive layout with easy-to-read visuals
    - Mobile-responsive for access on the go
    - Interactive elements for quick updates and task management
  - **Benefit:** Makes managing your business easy, even if you're not tech-savvy.
- 

### Summary:

The SOMBI Dashboard is your **digital cockpit**—a centralized hub that combines **visibility, control, and insights**. With real-time updates, customizable views, and seamless integration across all SOMBI systems, it empowers you to **make smarter decisions, optimize operations, and scale your business with confidence**.

# Conversations

## SOMBI Conversations Tab: Centralize Communication, Enhance Engagement

The Conversations Tab is the hub for all your business communications. It's designed to streamline messaging, improve response times, and maintain context across multiple channels, so you never miss an opportunity to connect with leads, clients, or team members.

### 1. All-in-One Messaging

- **Purpose:** Manage all conversations from a single place.
- **Features:**
  - Supports WhatsApp, email, SMS, and social media messaging
  - Unified inbox for all incoming and outgoing messages
  - Quick search and filtering to find conversations easily
- **Benefit:** Save time by eliminating the need to switch between multiple apps or platforms.

### 2. AI-Powered Automation

- **Purpose:** Respond instantly and intelligently.
- **Features:**
  - Automated replies to FAQs and common inquiries
  - Smart suggestions for personalized responses
  - Conversation routing to the right team member or AI agent
- **Benefit:** Provide faster responses, improve customer satisfaction, and reduce manual workload.

### 3. Lead & Client Management

- **Purpose:** Keep track of opportunities and customer interactions.
- **Features:**
  - Tag and categorize conversations by lead status or customer type
  - Maintain a complete history of interactions with each contact
  - Set reminders and follow-ups within the conversation thread
- **Benefit:** Ensure no lead or client is forgotten and maintain strong relationships.

### 4. Team Collaboration

- **Purpose:** Facilitate coordinated communication.
- **Features:**
  - Assign conversations to team members
  - Internal notes for context without cluttering the conversation for the customer
  - Shared visibility across the team for important threads
- **Benefit:** Improve teamwork, reduce response delays, and avoid duplicated efforts.

### 5. Analytics & Insights

- **Purpose:** Measure communication effectiveness.
- **Features:**
  - Track response times, engagement rates, and conversation outcomes
  - Identify trends in customer inquiries or feedback
  - Monitor performance of AI agents and team members

- **Benefit:** Optimize communication strategies and improve customer experience continuously.

## 6. User-Friendly Interface

- **Purpose:** Make conversations easy to manage.
  - **Features:**
    - Clean, organized view with conversation threads
    - Quick access buttons for replies, attachments, and follow-ups
    - Mobile-friendly for managing chats on the go
  - **Benefit:** Ensures you stay efficient and responsive, even when managing high volumes of messages.
- 

### Summary:

The SOMBI Conversations Tab is the **nerve center of your communication**, combining AI automation, multi-channel messaging, and team collaboration in one platform. It allows you to **respond faster, manage leads effectively, and maintain seamless engagement**, giving your business a professional and responsive presence at all times.

# Calenders

## SOMBI Calendars: Organize, Automate, and Stay on Schedule

The **Calendars** feature in SOMBI is your hub for managing appointments, meetings, tasks, and events. It integrates with other SOMBI systems to ensure your scheduling is automated, organized, and efficient.

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### Step 1: Access the Calendar

1. Log in to your SOMBI account.
2. Navigate to the “**Calendars**” tab in the main menu.
3. Choose the calendar view: **Daily, Weekly, or Monthly**.

**Tip:** Use the monthly view for an overview and the daily view for detailed planning.

---

### Step 2: Create a New Event or Appointment

1. Click “**New Event**” or the “+” button on the desired date.
2. Enter the event details:
  - Event name
  - Date and time
  - Duration
  - Location or virtual link (if applicable)
3. Assign the event to a **team member or yourself**.
4. Save the event.

**Tip:** Color-code events to quickly distinguish types (client meetings, internal tasks, webinars).

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### Step 3: Automate Client Bookings

1. Go to **Booking Settings** in the calendar tab.
2. Enable the **public booking link** for clients.
3. Set available time slots and meeting duration.
4. Clients can now schedule themselves, and the calendar will update automatically.

**Benefit:** Eliminates back-and-forth emails and ensures appointments are booked efficiently.

---

### Step 4: Set Reminders and Notifications

1. Open the event or appointment.
2. Enable reminders via **Email, SMS, or In-App Notifications**.
3. Choose the timing for reminders (e.g., 15 min, 1 hour, or 1 day before).
4. Save changes.

**Benefit:** Reduces missed appointments and improves client engagement.

---

## Step 5: Sync with External Calendars

1. Go to **Calendar Settings** > **Integrations**.
2. Connect with external calendars like Google Calendar or Outlook.
3. Choose **two-way sync** to update both calendars automatically.

**Benefit:** Keeps all your schedules synchronized across platforms.

---

## Step 6: Assign and Collaborate

1. Open an event or task.
2. Assign it to a team member or multiple members.
3. Add notes or instructions visible only to the team.
4. Team members receive notifications and reminders automatically.

**Benefit:** Ensures everyone knows their schedule and responsibilities.

---

## Step 7: Recurring Events

1. When creating an event, select **"Repeat"**.
2. Choose frequency: daily, weekly, monthly, or custom.
3. Set an end date if necessary.
4. Save the recurring schedule.

**Benefit:** Automates repetitive appointments, saving time on manual entry.

---

## Step 8: Track and Review

1. Use the **Calendar Analytics** to see:
  - Number of appointments scheduled
  - Missed or completed events
  - Team utilization
2. Adjust availability or scheduling rules based on insights.

**Benefit:** Optimizes time management and increases efficiency.

---

### Summary:

The SOMBI Calendars feature is your **centralized scheduling hub**, designed to streamline appointments, automate client bookings, and facilitate team collaboration. By following these steps, you can ensure that your business runs efficiently, your team stays coordinated, and no opportunity is ever missed.



# Contacts

## SOMBI Contacts: Organize, Manage, and Nurture Your Relationships

The **Contacts** feature in SOMBI is your centralized hub for managing **leads, clients, partners, and team members**. It allows you to maintain detailed information, track interactions, and build stronger relationships—all from one platform.

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### Step 1: Access Contacts

1. Log in to your SOMBI account.
2. Navigate to the **"Contacts"** tab in the main menu.
3. View your contacts in **list, grid, or card view** for easy management.

**Tip:** Use the search bar to quickly find specific contacts or filter by tags or status.

---

### Step 2: Add a New Contact

1. Click the **"New Contact"** or **"+"** button.
2. Enter essential information:
  - Name
  - Email
  - Phone number
  - Company/Organization (if applicable)
  - Tags or categories (Lead, Client, Partner, etc.)
3. Add additional information: address, notes, social media links, or custom fields.
4. Click **Save**.

**Benefit:** Keeps all contact details in one organized place, reducing information loss.

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### Step 3: Import Contacts

1. Go to **Import Contacts** in the contacts menu.
2. Upload a **CSV or Excel file** with your existing contacts.
3. Map the columns from your file to SOMBI fields.
4. Confirm and import.

**Benefit:** Quickly migrate existing contacts without manual entry.

---

### Step 4: Tag and Categorize

1. Open a contact's profile.
2. Assign **tags** such as Lead, Client, VIP, or Prospect.
3. Optionally, assign **status** (New, In Progress, Closed, Follow-up).

**Benefit:** Organize contacts for segmentation, prioritization, and targeted engagement.

---

## Step 5: Track Interactions

1. Access a contact's profile to view **conversation history**.
2. Add **notes** about calls, meetings, or emails.
3. Schedule follow-ups directly from the contact profile.

**Benefit:** Maintain context for every interaction, ensuring personalized engagement.

---

## Step 6: Assign Contacts to Team Members

1. Open the contact profile.
2. Click **Assign** and select a team member.
3. The assigned team member receives notifications and can manage the contact.

**Benefit:** Ensures accountability and improves follow-up efficiency.

---

## Step 7: Automate Follow-Ups

1. Go to **Automation Settings** within the contact profile or workflow.
2. Set triggers such as:
  - After a new contact is added
  - After a message is sent or a meeting is completed
3. Define automated actions like sending emails, reminders, or assigning tasks.

**Benefit:** Keep relationships active without missing opportunities.

---

## Step 8: Search, Filter, and Segment

1. Use the **search bar** to find contacts quickly.
2. Apply filters by tags, status, or interaction history.
3. Create **contact lists** for campaigns or team assignments.

**Benefit:** Easily target specific groups for marketing, sales, or follow-ups.

---

## Step 9: Export Contacts

1. Select the contacts or list you want to export.
2. Click **Export** and choose the format (CSV, Excel).
3. Download for reporting, backup, or integration with other tools.

**Benefit:** Maintain control of your data and integrate with other systems.

---

### Summary:

The SOMBI Contacts feature is a **complete CRM system** that centralizes your business relationships. By following these steps, you can **organize, track, and nurture your contacts efficiently**, ensuring no lead or client falls through the cracks and enabling stronger, more personalized engagement.

# Opportunities

## SOMBI Opportunities: Track, Manage, and Close Deals

The **Opportunities** feature in SOMBI is designed to help you **manage your sales pipeline, track potential deals, and maximize revenue**. It allows you to monitor every stage of a deal—from lead to closed sale—while keeping your team aligned and informed.

---

### Step 1: Access Opportunities

1. Log in to your SOMBI account.
2. Navigate to the **“Opportunities”** tab in the main menu.
3. View opportunities in **list view, pipeline view, or kanban board** for easy tracking.

**Tip:** Use pipeline view for a visual representation of all deals and their stages.

---

### Step 2: Create a New Opportunity

1. Click the **“New Opportunity”** or **“+”** button.
2. Enter key details:
  - Opportunity name
  - Associated contact or company
  - Deal value (optional)
  - Expected close date
  - Stage of the sales process (Lead, Prospect, Negotiation, Closing, Won, Lost)
3. Add notes, files, or relevant links.
4. Click **Save**.

**Benefit:** Track potential revenue and important deal information in one place.

---

### Step 3: Assign Opportunities to Team Members

1. Open the opportunity profile.
2. Click **Assign** and select the responsible team member or sales representative.
3. Assigned team members receive notifications and can update progress.

**Benefit:** Ensures accountability and improves follow-up efficiency.

---

### Step 4: Track Opportunity Progress

1. Update the opportunity stage as it moves through your pipeline.
2. Add notes after calls, meetings, or emails.
3. Log interactions or attach files relevant to the deal.

**Benefit:** Maintain a clear history of interactions and progress for every deal.

---

## Step 5: Set Reminders and Follow-Ups

1. Open the opportunity profile.
2. Click **Set Reminder** or **Schedule Follow-Up**.
3. Choose the date and time for notifications.
4. SOMBI will alert the responsible team member automatically.

**Benefit:** Keep deals on track and reduce the risk of missed opportunities.

---

## Step 6: Automate Opportunity Actions

1. Go to **Automation Settings** within the opportunity workflow.
2. Define triggers such as:
  - When a new opportunity is added
  - When an opportunity moves to a new stage
3. Set automated actions like sending emails, assigning tasks, or creating follow-up reminders.

**Benefit:** Streamlines sales processes and ensures timely actions without manual effort.

---

## Step 7: Analyze and Optimize

1. Use SOMBI dashboards to review opportunity metrics:
  - Number of opportunities per stage
  - Conversion rates
  - Total potential revenue
  - Team performance
2. Identify bottlenecks in the sales process and adjust strategies accordingly.

**Benefit:** Improve sales efficiency and predict revenue more accurately.

---

## Step 8: Close or Lose Opportunities

1. Once a deal is finalized, mark it as **Won** or **Lost**.
2. Add final notes, files, or outcomes for reference.
3. SOMBI automatically updates reports and dashboards with the result.

**Benefit:** Maintain an accurate sales history and refine forecasting.

---

### Summary:

The SOMBI Opportunities feature is a **powerful sales management tool** that helps you track, manage, and close deals efficiently. By following these steps, your team can **stay organized, maintain accountability, automate key actions, and maximize revenue**—all while having full visibility over the sales pipeline.

---

# Payments

## SOMBI Payments: Simplify Transactions and Manage Cash Flow

The **Payments** feature in SOMBI allows you to **collect, track, and manage payments efficiently**, ensuring smooth transactions for your business. It integrates with invoices, opportunities, and contacts to streamline financial operations.

---

### Step 1: Access Payments

1. Log in to your SOMBI account.
2. Navigate to the **"Payments"** tab in the main menu.
3. View all payment records, pending invoices, and completed transactions.

**Tip:** Use the filters to view payments by date, contact, or status.

---

### Step 2: Create a Payment Record

1. Click **"New Payment"** or the **"+"** button.
2. Enter payment details:
  - Payment name or description
  - Associated contact or company
  - Amount
  - Payment method (Bank Transfer, Credit Card, Cash, etc.)
  - Date of payment
3. Attach any supporting documents (receipt, invoice, etc.).
4. Click **Save**.

**Benefit:** Keeps all transactions organized and linked to the right contacts or deals.

---

### Step 3: Issue an Invoice

1. Navigate to **Invoices** within the Payments tab.
2. Click **Create Invoice**.
3. Select the contact or company.
4. Add items or services, amounts, and tax details.
5. Set payment terms (due date, installment options).
6. Click **Send** to email the invoice directly to the client.

**Benefit:** Streamlines billing and ensures timely payments.

---

### Step 4: Track Payment Status

1. Open the Payments tab or a specific invoice.
2. Check the **status**: Paid, Pending, Overdue.
3. Use reminders for unpaid invoices via email or SMS.
4. Update status manually if payments are received offline.

**Benefit:** Maintain accurate financial records and reduce delayed payments.

---

## Step 5: Automate Payment Reminders

1. Go to **Automation Settings** within the Payments tab.
2. Set triggers such as:
  - Payment due in 3 days
  - Overdue payments
3. Define automated actions:
  - Send reminder emails or SMS
  - Notify the responsible team member
4. Save the automation.

**Benefit:** Ensures clients pay on time without manual follow-ups.

---

## Step 6: Record Refunds or Adjustments

1. Open the payment or invoice record.
2. Click **Refund** or **Adjust Amount**.
3. Enter the reason, amount, and any supporting notes.
4. Save the update.

**Benefit:** Keeps financial records accurate and transparent.

---

## Step 7: Integrate with Accounting or CRM

1. Connect SOMBI Payments with your accounting software (if available).
2. Link payments to opportunities or contacts for full transaction context.
3. Enable automatic updates for invoices, receipts, and customer balances.

**Benefit:** Reduces double entry and ensures all systems reflect the latest financial data.

---

## Step 8: Generate Reports

1. Navigate to **Payment Reports** in the Payments tab.
2. Select the date range, contact, or status filters.
3. Generate reports for:
  - Total revenue received
  - Outstanding payments
  - Payment trends and patterns
4. Export reports in CSV or PDF format for accounting or management review.

**Benefit:** Helps you track cash flow, forecast revenue, and make informed financial decisions.

---

### Summary:

The SOMBI Payments feature is a **complete payment management system** that allows businesses to **issue invoices, track payments, automate reminders, and maintain accurate financial records**. By following these steps, you can ensure smooth transactions, reduce overdue

payments, and gain full visibility of your cash flow.

# Marketing

## SOMBI Marketing: Automate, Engage, and Grow

The **Marketing** feature in SOMBI is designed to help businesses **plan, automate, and execute marketing campaigns** efficiently. From email and SMS campaigns to social media and automated workflows, it ensures your audience is reached with the right message at the right time.

---

### Step 1: Access Marketing

1. Log in to your SOMBI account.
2. Navigate to the **"Marketing"** tab in the main menu.
3. View all campaigns, templates, and automation workflows in one dashboard.

**Tip:** Use the dashboard to monitor ongoing campaigns and results at a glance.

---

### Step 2: Create a New Campaign

1. Click **"New Campaign"** or the **"+"** button.
2. Select the campaign type:
  - Email
  - SMS
  - Social media post
  - Multi-channel
3. Name the campaign and add a description.
4. Click **Next** to start building content.

**Benefit:** Organizes campaigns and ensures a clear focus for each marketing effort.

---

### Step 3: Design Campaign Content

1. Use SOMBI's **drag-and-drop editor** or templates for emails, SMS, or social posts.
2. Customize content with:
  - Text, images, and videos
  - Links to landing pages or products
  - Personalization tags for names, companies, or locations
3. Preview the campaign for desktop and mobile views.

**Benefit:** Creates professional and engaging campaigns without needing design skills.

---

### Step 4: Define Your Audience

1. Select recipients from your **Contacts** list.
2. Filter by tags, status, location, or engagement history.
3. Create **segmented lists** for targeted campaigns.

**Benefit:** Ensures your message reaches the right audience, improving engagement and conversion.



---

## Step 5: Set Campaign Schedule

1. Choose whether to **send immediately** or schedule for a future date and time.
2. Set time-zone preferences if sending to international contacts.
3. For recurring campaigns, define frequency (daily, weekly, monthly).

**Benefit:** Optimizes timing for maximum engagement and automates repetitive campaigns.

---

## Step 6: Automation and Triggers

1. Go to **Automation Settings** within the campaign or workflow.
2. Define triggers such as:
  - Contact added to a list
  - Specific behavior or interaction (e.g., clicked a link, opened email)
3. Assign automated actions like sending follow-up emails, SMS reminders, or adding contacts to a new campaign.

**Benefit:** Saves time and ensures consistent communication with leads and clients.

---

## Step 7: Monitor and Analyze

1. Open your campaign dashboard to view real-time analytics:
  - Open and click-through rates
  - Delivery and bounce rates
  - Conversions or actions taken

2. Compare performance across campaigns to identify trends.
3. Export reports for internal review or presentations.

**Benefit:** Makes marketing data-driven and helps optimize future campaigns.

---

## Step 8: Optimize Campaigns

1. Use insights from analytics to test variations (A/B testing).
2. Adjust content, timing, or audience segmentation based on results.
3. Implement learnings into future campaigns for continuous improvement.

**Benefit:** Increases engagement, conversions, and overall campaign ROI.

---

### Summary:

The SOMBI Marketing feature is a **complete automation and engagement system**. By following these steps, businesses can **design, target, schedule, and analyze marketing campaigns efficiently**, ensuring consistent communication with leads and clients while maximizing growth and conversions.

# Automation

## SOMBI Automation: Streamline Tasks, Save Time, Scale Faster

The **Automation** feature in SOMBI allows you to **automate repetitive tasks, workflows, and business processes**. It helps you focus on high-value activities while SOMBI handles operational tasks automatically, improving efficiency, consistency, and scalability.

---

### Step 1: Access Automation

1. Log in to your SOMBI account.
2. Navigate to the **"Automation"** tab in the main menu.
3. View existing workflows, triggers, and automation sequences.

**Tip:** Start by reviewing pre-built templates to understand common automation workflows.

---

### Step 2: Create a New Automation Workflow

1. Click **"New Workflow"** or the **"+"** button.
2. Name the workflow and add a description for easy reference.
3. Choose the type of workflow:
  - Lead management
  - Marketing follow-up
  - Customer support
  - Internal tasks
4. Click **Next** to configure triggers and actions.

**Benefit:** Organizes automated processes and ensures each workflow has a clear purpose.

---

### Step 3: Define Triggers

1. Select an event that will start the automation, such as:
  - New contact added
  - New lead created
  - Customer interaction (opened email, clicked link, sent message)
  - Scheduled date or recurring event
2. Set conditions if needed (e.g., only for certain tags, regions, or deal stages).

**Benefit:** Ensures automation only runs when relevant, improving accuracy and efficiency.

---

### Step 4: Set Actions

1. Define actions that occur automatically after the trigger, such as:
  - Send an email, SMS, or in-app message
  - Assign tasks to team members
  - Update contact or opportunity status

- Add contacts to campaigns or lists

2. Set delays if needed (e.g., wait 1 day before sending a follow-up).

**Benefit:** Automates repetitive tasks, saving time and reducing human error.

---

## Step 5: Add Conditions and Branching

1. Use **If/Else** rules to create multiple paths in the workflow.

2. Example:

- If a lead opens an email → send a follow-up message
- If a lead does not open → schedule a reminder call

3. Combine multiple conditions for complex automation sequences.

**Benefit:** Makes automation smarter and more personalized.

---

## Step 6: Test the Workflow

1. Use the **Test Mode** to simulate the automation without affecting live contacts.

2. Check that triggers, actions, and conditions are working correctly.

3. Adjust steps if needed.

**Benefit:** Ensures your automation works perfectly before going live.

---

## Step 7: Activate the Workflow

1. Once tested, click **Activate**.

2. Monitor the workflow in the dashboard to track activity and results.

3. Make adjustments as your business needs evolve.

**Benefit:** Automates tasks in real time, allowing your team to focus on higher-value work.

---

## Step 8: Monitor and Optimize

1. Use SOMBI analytics to track workflow performance:

- Tasks completed automatically
- Engagement from automated messages
- Conversion or response rates

2. Identify bottlenecks or areas for improvement.

3. Adjust triggers, actions, or conditions to optimize results.

**Benefit:** Continuously improves efficiency and business outcomes.

---

### Summary:

SOMBI Automation is a **powerful engine** that allows businesses to **streamline repetitive tasks, improve consistency, and scale operations** without adding extra resources. By following these steps, you can **design, test, activate, and optimize automated workflows** that save time, enhance customer experiences, and drive growth.

# Sites

## SOMBI Sites: Build, Launch, and Manage Your Online Presence

The **Sites** feature in SOMBI allows businesses and entrepreneurs to **create professional websites, landing pages, and microsites** quickly and easily, without the need for coding skills. It integrates seamlessly with other SOMBI systems like **Contacts, Payments, Marketing, and Memberships**, making it a complete solution for online business management.

---

### Key Features of SOMBI Sites

#### 1. Drag-and-Drop Website Builder

- Build pages visually with intuitive drag-and-drop tools.
- Add elements like text, images, videos, buttons, forms, and social media embeds.
- Fully customizable layouts and themes.

**Benefit:** Launch professional-looking websites without technical expertise.

#### 2. Landing Pages

- Create high-converting landing pages for campaigns, webinars, or product launches.
- Include opt-in forms, countdown timers, and call-to-action buttons.
- Integrate with marketing automation and CRM to capture leads directly.

**Benefit:** Maximize lead generation and campaign conversions.

#### 3. Membership Sites

- Host exclusive content, courses, or subscription-based resources.
- Manage members, track access, and integrate with digital courses.
- Set access levels for different tiers or plans.

**Benefit:** Monetize content and manage memberships effortlessly.

#### 4. SEO & Analytics

- Built-in SEO tools for meta titles, descriptions, and keywords.
- Track page views, visitor behavior, and conversions with integrated analytics.

**Benefit:** Improve search visibility and measure website performance.

#### 5. Responsive Design

- Mobile-friendly and fully responsive layouts.
- Preview and adjust pages for desktop, tablet, and mobile devices.

**Benefit:** Ensure your site looks great on any device.

#### 6. Custom Domains & Hosting

- Connect your own domain or use a SOMBI subdomain.

- Reliable hosting included with high performance and uptime.

**Benefit:** Launch a branded online presence without worrying about technical infrastructure.

## 7. Integrations with SOMBI Systems

- Embed forms, payment buttons, calendars, and AI chat agents.
- Sync with Contacts, Payments, Marketing, and Automation for seamless workflow.

**Benefit:** Create a fully connected digital ecosystem that drives business growth.

---

# Steps to Create a Site in SOMBI

## 1. Access the Sites Tab

- Log in to SOMBI and navigate to the “Sites” tab.
- Click “New Site” to start a new project.

## 2. Choose a Template or Start from Scratch

- Select a pre-built template for your website or landing page.
- Or start with a blank canvas to fully customize your design.

## 3. Add and Customize Pages

- Use the drag-and-drop editor to add text, images, videos, buttons, and forms.
- Customize fonts, colors, and layout to match your brand.

## 4. Integrate Functional Elements

- Add forms, payment buttons, calendars, AI chatbots, or membership modules.
- Connect to marketing campaigns or automation workflows.

## 5. Preview and Test

- Check the site on desktop, tablet, and mobile views.
- Test all forms, buttons, and links to ensure proper functionality.

## 6. Connect Domain

- Choose to use a SOMBI subdomain or connect your own custom domain.
- Verify domain settings and SSL for secure access.

## 7. Publish the Site

- Click **Publish** to make the website live.
  - Monitor traffic and engagement using built-in analytics.
- 

### Summary:

SOMBI Sites is a **complete website and landing page solution** for businesses that want to build a professional online presence quickly. With drag-and-drop customization, membership capabilities, marketing integrations, and analytics, it allows entrepreneurs to **launch, manage, and scale digital experiences seamlessly**.

---

# Memberships

## SOMBI Memberships: Build, Manage, and Monetize Your Community

The Memberships feature in SOMBI allows businesses, educators, and creators to **create exclusive member-only areas, subscription content, and community platforms**. It integrates seamlessly with your website, courses, payments, and automation systems, giving you full control over access, content, and engagement.

---

### Key Features of SOMBI Memberships

#### 1. Exclusive Member Access

- Restrict pages, courses, or resources to members only.
- Control access by subscription tiers, roles, or custom permissions.

**Benefit:** Provide premium value to paying members or specific audiences.

#### 2. Tiered Membership Plans

- Create multiple subscription levels (Free, Basic, Premium, VIP).
- Offer different benefits and access levels for each tier.

**Benefit:** Monetize your content effectively while rewarding different levels of engagement.

#### 3. Integrated Payments

- Collect membership fees through integrated payment gateways.
- Automate recurring billing for subscriptions.
- Track payment history and manage overdue accounts.

**Benefit:** Simplifies revenue collection and subscription management.

#### 4. Content Management

- Upload and organize videos, documents, courses, and resources.
- Schedule content releases for drip-feed learning or phased access.

**Benefit:** Keep members engaged with structured and valuable content.

#### 5. Automation Integration

- Trigger automated emails or notifications when members join, renew, or upgrade.
- Connect to funnels or campaigns to guide members through your ecosystem.

**Benefit:** Enhances member engagement and reduces manual management.

#### 6. Community Engagement Tools

- Add forums, discussion boards, or comment sections.
- Enable messaging between members or with admins.

**Benefit:** Build a strong, interactive community around your membership.

## 7. Analytics & Insights

- Track member sign-ups, retention, and activity.
- Monitor subscription revenue and engagement metrics.

**Benefit:** Make informed decisions to improve member experience and grow revenue.

---

# Steps to Set Up Memberships in SOMBI

## Step 1: Access the Membership Tab

1. Log in to SOMBI and navigate to “Memberships”.
  2. Click “New Membership Plan” to start creating a plan.
- 

## Step 2: Create Membership Plans

1. Name your plan (e.g., Basic, Premium, VIP).
  2. Define access rights (which pages, courses, or content members can access).
  3. Set pricing and billing cycles (one-time, monthly, yearly).
- 

## Step 3: Add Content

1. Upload videos, documents, courses, or resources.
  2. Organize content into modules, sections, or categories.
  3. Optionally schedule content to release over time (drip-feed).
- 

## Step 4: Set Up Payments

1. Connect your payment gateway.
  2. Configure recurring subscription payments and trial periods if needed.
  3. Test payment flows to ensure members can subscribe successfully.
- 

## Step 5: Automate Member Engagement

1. Create automation rules for:
    - New member welcome emails
    - Renewal reminders
    - Upgrade or cross-sell notifications
  2. Connect automation to funnels or marketing campaigns.
- 

## Step 6: Launch Membership

1. Preview the membership portal from a member’s perspective.
  2. Test access, content, and payment functionality.
  3. Click **Publish** to make your membership live.
- 

## Step 7: Monitor and Optimize

1. Track analytics:

- Membership sign-ups
- Retention and cancellations
- Engagement with content

2. Use insights to improve content, engagement, and pricing strategies.

---

**Summary:**

SOMBI Memberships is a **complete membership management system** that allows you to **monetize content, engage your audience, and build a thriving community**. With tiered plans, integrated payments, automation, and analytics, it provides everything you need to **manage members efficiently and grow recurring revenue**.



# Media Storage

## SOMBI Media Storage: Organize, Access, and Use Your Digital Assets

The **Media Storage** feature in SOMBI is a centralized hub to **store, manage, and organize all your digital assets**—images, videos, documents, audio files, and more. It integrates seamlessly with your websites, courses, funnels, and marketing campaigns, allowing you to **access your content wherever you need it**.

---

### Key Features of SOMBI Media Storage

#### 1. Centralized Repository

- Store all digital assets in one secure location.
- Easily access media across SOMBI systems (Sites, Funnels, Courses, Marketing).

**Benefit:** Eliminates the need for multiple storage platforms and reduces file clutter.

#### 2. Organized Folders and Categories

- Create folders, subfolders, and tags to categorize files.
- Quickly search and filter media by type, name, or tag.

**Benefit:** Find files instantly and maintain an organized digital library.

#### 3. File Upload and Management

- Upload multiple files simultaneously.
- Rename, move, or delete files easily.
- Version control to keep track of updates to files.

**Benefit:** Efficiently manage media and maintain updated content.

#### 4. Direct Integration with SOMBI Systems

- Use stored media directly in websites, landing pages, funnels, courses, emails, and campaigns.
- No need to re-upload files multiple times.

**Benefit:** Saves time and ensures consistency across all platforms.

#### 5. Secure and Reliable Storage

- All files are stored securely with backups.
- Control access permissions for team members if needed.

**Benefit:** Protects your assets and ensures only authorized users can access them.

#### 6. Analytics (Optional)

- Track usage of media in campaigns or courses.
- Identify most-used or most-effective assets.

**Benefit:** Optimize your content strategy based on actual usage.

---

## Steps to Use SOMBI Media Storage

### Step 1: Access Media Storage

1. Log in to your SOMBI account.
  2. Navigate to the “**Media Storage**” tab in the main menu.
  3. Browse existing folders or create new folders to organize your files.
- 

### Step 2: Upload Files

1. Click “**Upload**” or drag and drop files into the storage area.
  2. Select files from your device.
  3. Assign them to a folder or add tags for easy search later.
  4. Wait for upload to complete and confirm file availability.
- 

### Step 3: Organize Files

1. Create folders and subfolders for categories (e.g., Marketing, Courses, Websites).
  2. Drag files into relevant folders or use tags to categorize them.
  3. Rename files for easier identification.
- 

### Step 4: Access and Use Files

1. Open the file you want to use.
  2. Copy the link or select “**Use in Project**” to integrate it directly into SOMBI Sites, Funnels, Courses, or Campaigns.
  3. Make edits if necessary (e.g., resize images or compress videos).
- 

### Step 5: Share or Assign Access

1. For team collaboration, assign access permissions to folders or specific files.
  2. Decide whether a team member can **view**, **edit**, or **manage** the files.
- 

### Step 6: Maintain and Update Assets

1. Regularly review your media storage to remove outdated or unused files.
  2. Update versions of files when new content is created.
  3. Tag and organize new uploads for easy future use.
- 

### Step 7: Backup and Security

1. SOMBI automatically secures and backs up all stored files.
  2. Ensure sensitive content is stored in restricted folders with limited access.
- 

#### Summary:

SOMBI Media Storage is a **centralized, secure, and organized repository** for all your digital

**assets.** By following these steps, businesses can **store, organize, and seamlessly use media across websites, funnels, courses, and marketing campaigns**, saving time and ensuring content consistency.

# Reputation

## SOMBI Reputation: Manage, Monitor, and Build Your Brand Trust

The Reputation feature in SOMBI helps businesses **monitor, manage, and enhance their online reputation**. By collecting reviews, tracking feedback, and responding efficiently, it ensures that your brand maintains a positive image across platforms and builds trust with customers.

---

### Key Features of SOMBI Reputation

#### 1. Centralized Review Management

- Collect reviews from multiple channels like Google, social media, and direct customer feedback.
- View all reviews in a single dashboard for easy monitoring.

**Benefit:** Saves time by eliminating the need to check multiple platforms.

#### 2. Automated Review Requests

- Send automated review requests via email, SMS, or in-app after a purchase or interaction.
- Schedule follow-ups to increase review submission rates.

**Benefit:** Boosts the quantity of reviews and enhances credibility.

#### 3. Review Monitoring & Alerts

- Receive notifications for new reviews, both positive and negative.
- Monitor brand mentions across platforms.

**Benefit:** React promptly to customer feedback and protect your brand image.

#### 4. Response Management

- Respond to reviews directly from SOMBI.
- Use templates or customize responses to maintain consistent messaging.

**Benefit:** Improves customer satisfaction and public perception.

#### 5. Sentiment Analysis

- Track overall sentiment of reviews (positive, neutral, negative).
- Identify common themes or issues mentioned by customers.

**Benefit:** Gain actionable insights to improve products, services, and customer experience.

#### 6. Analytics & Reporting

- Generate reports on review trends, average ratings, and response times.
- Track performance of reputation campaigns over time.

**Benefit:** Measure impact and adjust strategies for better brand management.

---

# Steps to Use SOMBI Reputation

## Step 1: Access the Reputation Tab

1. Log in to SOMBI.
  2. Navigate to the “**Reputation**” tab in the main menu.
  3. View the dashboard with all reviews and ratings collected.
- 

## Step 2: Connect Review Sources

1. Integrate SOMBI with platforms like Google, Facebook, or other review sites.
  2. Authorize access to fetch and display reviews in one centralized location.
- 

## Step 3: Send Automated Review Requests

1. Navigate to **Automation/Review Requests**.
  2. Create a template for requesting reviews via email or SMS.
  3. Set triggers, such as:
    - After a purchase
    - After a service completion
    - After a webinar or course
  4. Schedule reminders for customers who have not responded.
- 

## Step 4: Monitor Incoming Reviews

1. Check new reviews on the dashboard.
  2. Use filters to sort by platform, rating, or sentiment.
  3. Receive notifications for high-priority reviews.
- 

## Step 5: Respond to Reviews

1. Open a review and click **Respond**.
  2. Use templates for standard responses or write custom replies.
  3. Respond promptly to negative reviews to resolve issues and thank customers for positive reviews.
- 

## Step 6: Analyze Reputation Metrics

1. Review sentiment trends over time: positive, neutral, negative.
  2. Identify recurring feedback or common issues.
  3. Generate reports for team meetings or strategy reviews.
- 

## Step 7: Optimize Reputation Strategy

1. Adjust products, services, or processes based on feedback.
  2. Continue automating review requests to maintain a steady flow of customer feedback.
  3. Engage proactively with customers to strengthen brand loyalty.
-

**Summary:**

SOMBI Reputation is a complete reputation management system that helps businesses collect, monitor, respond, and analyze customer feedback. By following these steps, you can enhance brand trust, improve customer satisfaction, and maintain a strong positive image online.

# Reporting

## SOMBI Reporting: Track, Analyze, and Make Data-Driven Decisions

The **Reporting** feature in SOMBI allows businesses to **collect, visualize, and analyze data across all systems**—from marketing campaigns and sales pipelines to memberships, payments, and reputation. It provides insights that help you make informed decisions, optimize processes, and measure performance.

---

### Key Features of SOMBI Reporting

#### 1. Centralized Analytics Dashboard

- View all key metrics in one place.
- Access reports on contacts, opportunities, payments, marketing campaigns, courses, and more.

**Benefit:** Quickly understand business performance without switching platforms.

#### 2. Customizable Reports

- Select specific data points, date ranges, and filters.
- Generate reports tailored to team, project, or campaign needs.

**Benefit:** Provides relevant insights for each department or goal.

#### 3. Visual Data Representation

- Charts, graphs, and tables for easy interpretation.
- Compare trends over time and across different metrics.

**Benefit:** Simplifies complex data and improves understanding.

#### 4. Export Options

- Export reports in PDF, Excel, or CSV formats.
- Share reports with stakeholders or for record-keeping.

**Benefit:** Facilitates collaboration and documentation.

#### 5. Automated Reporting

- Schedule recurring reports to be sent via email to team members.
- Set triggers for reports based on specific events or KPIs.

**Benefit:** Saves time and ensures consistent monitoring without manual effort.

#### 6. Cross-System Integration

- Pull data from Contacts, Opportunities, Payments, Marketing, Memberships, Funnels, and Reputation.
- Combine data for a complete business overview.

**Benefit:** Provides holistic insights for smarter business decisions.

---

## Steps to Use SOMBI Reporting

### Step 1: Access the Reporting Tab

1. Log in to your SOMBI account.
  2. Navigate to the “**Reporting**” tab in the main menu.
  3. View existing reports and analytics dashboards.
- 

### Step 2: Select Report Type

1. Choose the type of report you want to generate:
    - Sales/Opportunities
    - Payments & Revenue
    - Marketing Campaign Performance
    - Membership Engagement
    - Reputation/Reviews
  2. Click **Create Report** or select a pre-built template.
- 

### Step 3: Define Report Parameters

1. Select the data sources (Contacts, Payments, Opportunities, etc.).
  2. Set filters, such as:
    - Date range (daily, weekly, monthly, yearly)
    - Specific campaigns, products, or services
    - Team member or department
  3. Choose visualization options: tables, charts, or graphs.
- 

### Step 4: Generate Report

1. Click **Generate** to view the report.
  2. Analyze the data on-screen using SOMBI’s visual dashboards.
  3. Drill down into metrics for detailed insights.
- 

### Step 5: Export and Share

1. Export reports in PDF, Excel, or CSV formats.
  2. Share reports with team members or stakeholders via email or internal channels.
  3. Schedule recurring exports for automated delivery.
- 

### Step 6: Monitor KPIs and Trends

1. Track key performance indicators (KPIs) over time.
  2. Compare trends, such as revenue growth, conversion rates, or engagement levels.
  3. Identify areas for improvement or opportunities for growth.
- 

### Step 7: Optimize Strategy



1. Use insights from reports to adjust marketing, sales, or operational strategies.
  2. Implement changes and monitor impact through subsequent reports.
  3. Continuously refine processes based on data-driven decisions.
- 

**Summary:**

SOMBI Reporting is a **powerful analytics and reporting tool** that provides businesses with actionable insights across all systems. By following these steps, you can **track performance, analyze trends, share data, and make informed decisions** that improve efficiency, revenue, and customer satisfaction.

# Mobile App

## SOMBI Mobile App: Manage Your Business On-the-Go

The SOMBI Mobile App allows entrepreneurs, teams, and business owners to **access their SOMBI ecosystem from anywhere**, ensuring that operations, sales, marketing, and communications continue seamlessly while on the move. The app mirrors the main platform's functionality while being optimized for mobile devices.

---

### Key Features of the SOMBI Mobile App

#### 1. Full Access to SOMBI Dashboard

- View tasks, metrics, and notifications in real-time.
- Track contacts, opportunities, and payments directly from your phone.

**Benefit:** Stay informed and make decisions anytime, anywhere.

#### 2. Manage Conversations & Contacts

- Respond to messages from customers, leads, or team members.
- Update contact information and add new leads on the go.

**Benefit:** Ensure no conversation or opportunity is missed, even when away from the desktop.

#### 3. Opportunities & Sales Pipeline

- Track deals, update stages, and log activities.
- Assign tasks and follow-ups to team members in real-time.

**Benefit:** Keep your sales pipeline active and accurate while on the move.

#### 4. Payments & Transactions

- Record payments, view invoices, and check transaction statuses.
- Send payment reminders or receipts from your phone.

**Benefit:** Ensure timely revenue tracking and improve cash flow management.

#### 5. Marketing Campaign Management

- Monitor ongoing campaigns and check analytics.
- Trigger automation, send emails, or SMS campaigns directly from mobile.

**Benefit:** Keep marketing campaigns active and responsive, even remotely.

#### 6. Membership & Course Management

- View members, track subscriptions, and manage access.
- Monitor course progress or content engagement.

**Benefit:** Maintain member satisfaction and course effectiveness on-the-go.

## 7. Push Notifications & Alerts

- Receive instant notifications for:
  - New messages or leads
  - Payments received or overdue
  - Review submissions or reputation alerts
  - Scheduled tasks or meetings

**Benefit:** Stay proactive and respond immediately to important events.

## 8. Integration Across SOMBI Modules

- Access media storage, funnels, automation, and reputation management directly from mobile.
- Seamlessly sync changes with your desktop account.

**Benefit:** Work efficiently with all your business systems in one mobile app.

---

# Steps to Use the SOMBI Mobile App

## Step 1: Download and Install

1. Go to the **Apple App Store** or **Google Play Store**.
2. Search for “**SOMBI**” and download the app.
3. Install it on your mobile device.

---

## Step 2: Log In

1. Open the app.
2. Enter your SOMBI account credentials (email and password).
3. Complete any verification steps if required (e.g., 2FA).

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## Step 3: Navigate the Dashboard

1. Access the mobile dashboard for an overview of your business metrics.
2. Swipe through modules such as **Contacts**, **Opportunities**, **Payments**, **Marketing**, and **Memberships**.

---

## Step 4: Manage Conversations

1. Tap the **Conversations** tab.
2. Respond to messages from customers or team members.
3. Log notes or follow-up tasks directly from the conversation.

---

## Step 5: Track Opportunities and Payments

1. Open the **Opportunities** tab to check pipeline status.
2. Update deal stages, assign tasks, or add notes.
3. Navigate to **Payments** to check invoices, confirm transactions, or send reminders.

## Step 6: Monitor Marketing & Automation

1. Access the **Marketing** tab to review ongoing campaigns.
  2. Trigger automated emails, SMS, or workflows from mobile.
  3. Check campaign performance metrics in real-time.
- 

## Step 7: Manage Memberships and Courses

1. Open the **Memberships** or **Courses** tab.
  2. Review new sign-ups or member activity.
  3. Adjust content access or manage subscription plans as needed.
- 

## Step 8: Receive Alerts & Notifications

1. Enable push notifications to stay updated on important events.
  2. Respond quickly to leads, payments, or customer feedback.
  3. Use alerts to prioritize urgent tasks while on the go.
- 

### Summary:

The SOMBI Mobile App is a **comprehensive on-the-go solution** that gives business owners and teams **full control over operations, sales, marketing, and customer engagement** from their mobile device. By using the app, you can **stay connected, respond faster, and manage your business anywhere**, ensuring productivity and efficiency at all times.

# Webinars

## SOMBI Webinars: Host, Engage, and Convert

The Webinars feature in SOMBI allows businesses, coaches, and educators to **host live or automated webinars**, engage audiences, and convert attendees into leads or customers. It integrates with marketing, contacts, payments, and automation, making webinar management seamless and effective.

---

### Key Features of SOMBI Webinars

#### 1. Live and Automated Webinars

- Host live webinars for real-time interaction.
- Schedule automated webinars (pre-recorded) to run at multiple times.

**Benefit:** Engage audiences in real-time or on-demand without missing opportunities.

#### 2. Registration & Landing Pages

- Create customized registration pages for your webinars.
- Capture attendee information and integrate with your contacts.

**Benefit:** Collect leads efficiently and manage attendees from one place.

#### 3. Interactive Engagement Tools

- Use polls, Q&A sessions, and live chat to engage participants.
- Share downloadable resources or links during the webinar.

**Benefit:** Increase engagement, retention, and participant satisfaction.

#### 4. Integration with Automation & Marketing

- Automatically add registrants to email sequences or campaigns.
- Trigger follow-ups, reminders, or surveys based on attendee behavior.

**Benefit:** Nurture leads and maximize conversions effortlessly.

#### 5. Payments & Monetization

- Charge for webinar access using integrated payment options.
- Offer upsells or bundle webinars with courses or memberships.

**Benefit:** Turn webinars into revenue-generating opportunities.

#### 6. Analytics & Reporting

- Track registrations, attendance, engagement, and conversions.
- Export reports for follow-up and performance evaluation.

**Benefit:** Measure success and optimize future webinars.

#### 7. Recording & Replay

- Automatically record live webinars.
- Share replays with attendees or as part of a funnel.

**Benefit:** Extend webinar value and reach those who missed the live session.

---

## Steps to Host a Webinar in SOMBI

### Step 1: Access the Webinars Tab

1. Log in to your SOMBI account.
  2. Navigate to the “**Webinars**” tab in the main menu.
  3. Click “**Create New Webinar**” to start a new session.
- 

### Step 2: Set Webinar Details

1. Enter the webinar title and description.
  2. Choose the type: **Live** or **Automated**.
  3. Set the date, time, and duration.
  4. Add presenters or team members.
- 

### Step 3: Create Registration Page

1. Customize the registration page with:
    - Branding, images, and text
    - Registration form fields (name, email, phone, etc.)
  2. Integrate with your **Contacts** list to automatically add registrants.
  3. Optionally, enable payment collection for paid webinars.
- 

### Step 4: Promote the Webinar

1. Share the registration page link via email, social media, or your website.
  2. Use SOMBI Marketing to create automated campaigns targeting potential attendees.
  3. Schedule reminders and follow-up emails.
- 

### Step 5: Host the Webinar

1. Start the live session at the scheduled time.
  2. Engage attendees with polls, Q&A, and chat.
  3. Share downloadable resources, links, or upsell offers during the webinar.
- 

### Step 6: Automate Follow-Ups

1. Use automation to send thank-you emails or replay links.
  2. Trigger follow-up campaigns for attendees and non-attendees.
  3. Segment registrants based on engagement and behavior for future marketing.
- 

### Step 7: Analyze Performance

1. Review analytics in the

## Webinars

tab:

- Registrations vs. attendees
- Engagement levels
- Conversions or sales from webinar offers

2. Export reports for internal review or to refine future webinars.

---

### Summary:

SOMBI Webinars is a **complete webinar management system** that allows you to **host live and automated webinars, engage your audience, and convert leads into customers**. By following these steps, you can **create registration pages, promote your webinar, interact with participants, and track performance**—all from within the SOMBI platform.

# Courses

## SOMBI Digital Courses: Create, Host, and Monetize Online Learning

The Digital Courses feature in SOMBI allows educators, trainers, and entrepreneurs to **create, host, and sell** online courses seamlessly. It integrates with memberships, payments, marketing, and automation, making course creation and management simple while providing learners with a professional and engaging learning experience.

---

### Key Features of SOMBI Digital Courses

#### 1. Course Creation Tools

- Build courses with modules, lessons, quizzes, and assignments.
- Upload video, audio, documents, and multimedia content.
- Organize content into structured learning paths.

**Benefit:** Deliver professional, organized, and engaging courses without needing external platforms.

#### 2. Membership Integration

- Restrict course access to members or subscription tiers.
- Offer courses as part of membership plans.

**Benefit:** Monetize content effectively and manage access automatically.

#### 3. Payment & Monetization

- Charge for courses with one-time payments or subscriptions.
- Integrate with SOMBI Payments for seamless transactions.
- Offer discounts, bundles, or upsells.

**Benefit:** Generate revenue directly from your digital courses.

#### 4. Automation & Follow-Up

- Automate course enrollment, reminders, and progress notifications.
- Trigger follow-up emails, surveys, or upsell campaigns based on learner activity.

**Benefit:** Improve engagement and student retention without manual intervention.

#### 5. Quizzes, Assignments, and Certifications

- Include interactive quizzes and assignments to test learners.
- Automatically issue completion certificates when courses are finished.

**Benefit:** Enhance learning outcomes and provide credibility for learners.

#### 6. Analytics & Reporting

- Track learner progress, engagement, and course completion.



- Monitor revenue generated per course and student activity.

**Benefit:** Measure performance and optimize course content and marketing.

## 7. Responsive Design

- Courses are accessible on desktop, tablet, and mobile devices.
- Learners can access content anytime, anywhere.

**Benefit:** Increases accessibility and learner satisfaction.

---

# Steps to Create and Manage Digital Courses in SOMBI

## Step 1: Access the Digital Courses Tab

1. Log in to your SOMBI account.
2. Navigate to “Digital Courses” in the main menu.
3. Click “Create New Course” to start a new course.

---

## Step 2: Define Course Details

1. Enter the course title, description, and category.
2. Add a cover image or branding visuals.
3. Set pricing and access (free, one-time payment, or subscription).

---

## Step 3: Add Modules and Lessons

1. Create modules or sections to organize content.
2. Add lessons, including videos, audio, PDFs, and other resources.
3. Include quizzes or assignments for learner evaluation.

---

## Step 4: Set Membership Access

1. Assign course access to specific membership tiers if applicable.
2. Restrict access to non-members if it is a paid course.

---

## Step 5: Integrate Payments

1. Connect your SOMBI Payments account.
2. Configure one-time or recurring payments.
3. Set up discount codes or special offers if needed.

---

## Step 6: Automate Course Engagement

1. Trigger welcome emails when learners enroll.
2. Send reminders for incomplete lessons or upcoming assignments.
3. Automate follow-ups for course upsells or feedback surveys.

---

## Step 7: Publish and Share

1. Preview the course to ensure content, navigation, and quizzes work correctly.
  2. Click **Publish** to make the course live.
  3. Share course links via marketing campaigns, funnels, or membership portals.
- 

## Step 8: Monitor and Optimize

1. Track learner progress, completion rates, and engagement metrics.
  2. Analyze revenue and course performance.
  3. Update content, quizzes, or lessons to improve learner satisfaction and outcomes.
- 

### Summary:

SOMBI Digital Courses is a **complete online learning solution** that allows you to **create, host, and monetize courses** while providing an engaging learning experience. With integrated payments, memberships, automation, and analytics, you can **deliver professional courses, track progress, and grow your education business efficiently**.

# Settings

## SOMBI Settings: Configure, Personalize, and Secure Your Platform

The **Settings** feature in SOMBI allows users to **configure platform preferences, manage account information, and ensure security** across all SOMBI modules. It provides control over user access, integrations, branding, and notifications, giving you a fully personalized and secure experience.

---

### Key Features of SOMBI Settings

#### 1. Account Management

- Update personal information, profile picture, and login credentials.
- Change passwords and manage multi-factor authentication (2FA).

**Benefit:** Ensures your account remains secure and up-to-date.

#### 2. Team & Permissions

- Add, remove, or manage team members.
- Assign roles and permissions to control access to modules (e.g., marketing, payments, courses).

**Benefit:** Maintain control over who can access and modify different areas of your SOMBI system.

#### 3. Branding & Customization

- Set your brand logo, colors, and domain preferences.
- Customize email templates, landing pages, and notifications.

**Benefit:** Maintain a consistent brand identity across all interactions and touchpoints.

#### 4. Integration Management

- Connect third-party tools such as payment gateways, email services, or analytics platforms.
- Manage API keys, webhooks, and external integrations.

**Benefit:** Seamlessly connect SOMBI with your existing tech stack for enhanced functionality.

#### 5. Notifications & Alerts

- Configure how and when you receive alerts for messages, payments, opportunities, or tasks.
- Enable push notifications, email alerts, or in-app reminders.

**Benefit:** Stay informed about important events and tasks in real time.

#### 6. Security & Privacy

- Enable multi-factor authentication, IP restrictions, and session management.

- Control data sharing and privacy settings for your account and team.

**Benefit:** Protect sensitive business data and maintain compliance.

## 7. Platform Preferences

- Set default currency, time zone, language, and date formats.
- Adjust workflow preferences for dashboards, notifications, and reports.

**Benefit:** Personalize SOMBI to fit your business operations and regional requirements.

---

# Steps to Configure SOMBI Settings

## Step 1: Access the Settings Tab

1. Log in to your SOMBI account.
2. Navigate to the “Settings” tab in the main menu.
3. Review available sections such as Account, Team, Branding, Integrations, and Security.

---

## Step 2: Update Account Information

1. Click **Account**.
2. Edit your name, email, profile picture, and password.
3. Enable two-factor authentication for added security.

---

## Step 3: Manage Team Members

1. Navigate to **Team & Permissions**.
2. Add new team members or remove inactive ones.
3. Assign roles and module-specific permissions (e.g., admin, marketer, support).

---

## Step 4: Customize Branding

1. Upload your logo and select brand colors.
2. Update email templates and notification designs.
3. Set your custom domain if applicable.

---

## Step 5: Set Up Integrations

1. Open the **Integrations** section.
2. Connect payment gateways, email marketing tools, or CRM systems.
3. Configure API keys or webhook settings as needed.

---

## Step 6: Configure Notifications

1. Choose which events trigger notifications (messages, payments, tasks, reviews).
  2. Select delivery methods (email, in-app, or push notifications).
  3. Save preferences for each user or team role.
-

## Step 7: Adjust Security & Privacy

1. Enable multi-factor authentication (2FA).
  2. Set IP restrictions or session timeouts if required.
  3. Review data privacy settings and sharing permissions.
- 

## Step 8: Personalize Platform Preferences

1. Set default currency, time zone, language, and date format.
  2. Adjust dashboard layout or workflow defaults.
  3. Save changes to ensure consistent experience across your SOMBI account.
- 

### Summary:

SOMBI Settings is the control center for managing your account, team, security, and branding. By following these steps, users can **personalize their experience, secure their data, integrate third-party tools, and configure notifications**, ensuring the platform works efficiently for your business needs.

# Billing

## SOMBI Billing: Manage Payments, Invoices, and Subscriptions

The **Billing** feature in SOMBI allows businesses to **track, manage, and automate all financial transactions** including invoices, payments, subscriptions, and refunds. It integrates with Payments, Memberships, Digital Courses, and Opportunities to streamline revenue management.

---

### Key Features of SOMBI Billing

#### 1. Invoice Creation & Management

- Generate professional invoices for products, services, or subscriptions.
- Customize invoices with your branding and payment terms.

**Benefit:** Maintain professional and consistent financial communications with clients.

#### 2. Payment Tracking

- Track invoice status: paid, pending, or overdue.
- Link payments to contacts, memberships, or opportunities.

**Benefit:** Stay on top of cash flow and reduce missed payments.

#### 3. Subscription & Recurring Billing

- Automate recurring payments for memberships, courses, or services.
- Configure billing cycles (weekly, monthly, yearly) and trial periods.

**Benefit:** Generate predictable revenue and reduce manual work.

#### 4. Integrated Payment Gateways

- Accept payments via credit cards, bank transfers, or digital wallets.
- Secure and reliable transactions for one-time or recurring payments.

**Benefit:** Provide convenience to customers and ensure timely payments.

#### 5. Automated Reminders & Notifications

- Send payment reminders for pending or overdue invoices.
- Notify customers of successful payments or subscription renewals.

**Benefit:** Reduces late payments and improves customer communication.

#### 6. Reporting & Analytics

- Monitor revenue, outstanding invoices, and payment trends.
- Export financial reports for accounting or business analysis.

**Benefit:** Make data-driven decisions to optimize revenue and financial management.

# Steps to Use SOMBI Billing

## Step 1: Access the Billing Tab

1. Log in to your SOMBI account.
  2. Navigate to the “Billing” tab in the main menu.
  3. Review existing invoices, payments, and subscription records.
- 

## Step 2: Create a New Invoice

1. Click “Create Invoice”.
  2. Select the contact or client to invoice.
  3. Add products, services, or courses with pricing and quantity.
  4. Customize invoice terms and branding (logo, colors, payment instructions).
  5. Save and preview the invoice.
- 

## Step 3: Send Invoice to Client

1. Send the invoice via email directly from SOMBI or download as PDF.
  2. Include payment instructions and due dates.
  3. Optionally, schedule reminders for unpaid invoices.
- 

## Step 4: Track Payments

1. Monitor invoice status: paid, pending, or overdue.
  2. Mark payments manually if received offline, or track online payments automatically.
  3. Apply partial payments if necessary.
- 

## Step 5: Set Up Recurring Billing

1. Navigate to Subscriptions/Recurring Payments.
  2. Select the contact and the service or product to bill.
  3. Configure billing frequency (monthly, yearly, etc.) and trial period if applicable.
  4. Activate recurring billing to automate future payments.
- 

## Step 6: Automate Reminders & Notifications

1. Enable automatic payment reminders for pending or overdue invoices.
  2. Notify clients of successful payments or subscription renewals.
  3. Customize message templates for consistent communication.
- 

## Step 7: Monitor Financial Analytics

1. Access reports to see total revenue, outstanding invoices, and payment trends.
  2. Export reports for accounting or internal review.
  3. Identify top-paying clients, recurring revenue, and late payment patterns.
- 

### Summary:

SOMBI Billing is a complete financial management tool that helps businesses create invoices,

**track payments, automate subscriptions, and analyze revenue trends. By following these steps, you can simplify your billing process, improve cash flow, and maintain professional client communication.**



# My Staff

## SOMBI My Staff: Manage Your Team Efficiently

The My Staff feature in SOMBI allows business owners and managers to **organize, track, and manage their team members**. It integrates with tasks, permissions, communications, and performance tracking, giving you full control over how your team operates within the SOMBI ecosystem.

---

### Key Features of SOMBI My Staff

#### 1. Team Member Management

- Add, edit, or remove staff members.
- Store essential employee information, including contact details, roles, and responsibilities.

**Benefit:** Keep your team organized and up-to-date in a centralized platform.

#### 2. Role & Permission Assignment

- Assign roles such as admin, manager, marketer, or support staff.
- Control access to specific modules (e.g., Marketing, Payments, Memberships).

**Benefit:** Maintain security and ensure team members have access only to relevant areas.

#### 3. Task & Activity Management

- Assign tasks or responsibilities to team members.
- Track progress and completion status of assigned activities.

**Benefit:** Improve accountability and workflow efficiency.

#### 4. Performance Monitoring

- Track staff activity, engagement, and contribution.
- Review completed tasks, response times, and overall productivity.

**Benefit:** Evaluate team performance and identify areas for improvement.

#### 5. Integration with Communication & Automation

- Grant team members access to Conversations, Marketing, or Automation modules.
- Use automated workflows to notify or assign tasks to staff members.

**Benefit:** Streamlines operations and keeps the team aligned on objectives.

#### 6. Notifications & Alerts

- Receive alerts when staff complete tasks or require attention.
- Send reminders for pending assignments or upcoming deadlines.

**Benefit:** Ensures timely action and keeps the team accountable.

# Steps to Use SOMBI My Staff

## Step 1: Access the My Staff Tab

1. Log in to SOMBI.
  2. Navigate to the “My Staff” tab in the main menu.
  3. Review your existing team members or prepare to add new ones.
- 

## Step 2: Add a Team Member

1. Click “Add Staff Member”.
  2. Enter the staff member’s details: name, email, phone, role, and department.
  3. Assign a login account with credentials for accessing SOMBI.
- 

## Step 3: Assign Roles & Permissions

1. Select the modules or areas each staff member can access (e.g., Payments, Marketing, Digital Courses).
  2. Assign a role: admin, manager, or standard user.
  3. Save settings to enforce permissions.
- 

## Step 4: Assign Tasks and Responsibilities

1. Open the Tasks/Assignments section.
  2. Create new tasks, including title, description, and due date.
  3. Assign the task to a specific staff member.
  4. Track progress and completion status in real-time.
- 

## Step 5: Monitor Staff Performance

1. Use the dashboard to see task completion, engagement, and activity reports.
  2. Identify high-performing team members or areas needing improvement.
  3. Provide feedback or adjust responsibilities as necessary.
- 

## Step 6: Integrate with Automation

1. Connect team tasks with SOMBI automation workflows.
  2. Trigger automatic notifications, reminders, or follow-ups when tasks are assigned or completed.
  3. Reduce manual oversight while ensuring accountability.
- 

## Step 7: Communicate and Collaborate

1. Grant access to Conversations or internal messaging modules.
  2. Facilitate collaboration between staff members on tasks, projects, or campaigns.
  3. Ensure all team members are aligned with company goals and workflows.
- 

### Summary:

SOMBI My Staff is a **centralized team management tool** that allows businesses to **organize staff**,

**assign roles, monitor performance, and streamline communication. By following these steps, managers can improve accountability, increase productivity, and maintain smooth operations across the organization.**

# Business Profile

## SOMBI Business Profile: Showcase, Manage, and Optimize Your Brand

The **Business Profile** feature in SOMBI allows entrepreneurs and companies to **create a professional digital presence** that represents their brand, services, and offerings. It integrates with Contacts, Opportunities, Payments, Marketing, and Reputation, enabling your business to be discovered, trusted, and efficiently managed.

---

### Key Features of SOMBI Business Profile

#### 1. Business Information Management

- Add company name, description, logo, and branding visuals.
- Include contact information such as email, phone, website, and social media links.

**Benefit:** Ensures potential clients and partners have accurate and complete business information.

#### 2. Service & Product Listing

- Showcase your products, services, packages, or courses.
- Add images, descriptions, pricing, and call-to-action buttons.

**Benefit:** Highlight offerings to generate interest, leads, and sales.

#### 3. Integration with Opportunities & Payments

- Connect your business profile to sales pipelines and payment options.
- Track inquiries, requests, and transactions coming through the profile.

**Benefit:** Streamlines lead generation and sales conversion.

#### 4. Reputation & Reviews

- Display collected reviews and ratings on your business profile.
- Showcase testimonials to build credibility and trust.

**Benefit:** Strengthens your online reputation and social proof.

#### 5. SEO & Discovery

- Optimize business profile for search within SOMBI and external search engines.
- Include keywords, meta description, and location information.

**Benefit:** Makes your business discoverable to potential clients and leads.

#### 6. Analytics & Insights

- Monitor profile visits, interactions, and inquiries.
- Analyze which products or services get the most attention.

**Benefit:** Make data-driven decisions to improve offerings and marketing.

---

## Steps to Set Up SOMBI Business Profile

### Step 1: Access Business Profile Tab

1. Log in to your SOMBI account.
  2. Navigate to the “**Business Profile**” tab in the main menu.
  3. Click “**Create Profile**” or “**Edit Profile**” to start setup.
- 

### Step 2: Add Basic Business Information

1. Enter your company name and description.
  2. Upload your logo, cover image, and other branding visuals.
  3. Add contact details: email, phone, website, and social media links.
- 

### Step 3: List Services or Products

1. Add each service, product, or offering with:
    - Title and description
    - Images or videos
    - Pricing and call-to-action buttons
  2. Organize offerings into categories if needed.
- 

### Step 4: Connect Opportunities & Payments

1. Link your profile to the **Opportunities** module to track inquiries.
  2. Integrate **Payment** options for product or service purchases.
  3. Test to ensure inquiries and payments are captured correctly.
- 

### Step 5: Add Reviews and Testimonials

1. Display existing reviews collected from SOMBI Reputation or external sources.
  2. Highlight testimonials to build trust and credibility.
- 

### Step 6: Optimize for Discovery

1. Add meta titles, descriptions, and relevant keywords.
  2. Include location information if applicable.
  3. Ensure profile content is clear and engaging.
- 

### Step 7: Publish and Promote

1. Preview the business profile to ensure all information is accurate and visually appealing.
  2. Click **Publish** to make your profile live.
  3. Share the profile link via marketing campaigns, email, or social media.
-

## Step 8: Monitor and Update

1. Track visits, inquiries, and interactions through SOMBI analytics.
  2. Update services, branding, or contact information as needed.
  3. Continuously optimize based on performance metrics and feedback.
- 

### Summary:

The SOMBI Business Profile is a **centralized digital representation of your brand** that helps businesses **showcase offerings, build credibility, capture leads, and monitor interactions**. By following these steps, you can create a **professional, discoverable, and fully integrated business profile** within SOMBI.

# Email Services

## SOMBI Email Services: Engage, Automate, and Convert

The **Email Services** feature in SOMBI allows businesses to **create, send, and manage professional email campaigns**. It integrates with Contacts, Marketing, Automation, and Reporting, helping you engage your audience, nurture leads, and drive conversions efficiently.

---

### Key Features of SOMBI Email Services

#### 1. Email Campaign Creation

- Build professional email campaigns using templates or a drag-and-drop editor.
- Customize emails with branding, images, links, and calls-to-action.

**Benefit:** Create visually appealing emails without needing external tools.

#### 2. Contact Segmentation

- Segment your email list based on behavior, demographics, purchase history, or engagement.
- Target the right audience with tailored messaging.

**Benefit:** Increases open rates, click-through rates, and conversion rates.

#### 3. Automation & Sequences

- Set up automated email sequences, including welcome emails, follow-ups, and drip campaigns.
- Trigger emails based on actions like sign-ups, purchases, or webinar registrations.

**Benefit:** Nurture leads and engage customers automatically, saving time and effort.

#### 4. A/B Testing

- Test different subject lines, email content, or send times.
- Analyze performance to optimize campaigns.

**Benefit:** Improve campaign effectiveness through data-driven decisions.

#### 5. Analytics & Reporting

- Track opens, clicks, bounces, and unsubscribes.
- Monitor overall campaign performance and ROI.

**Benefit:** Gain insights into your email marketing and adjust strategies accordingly.

#### 6. Compliance & Deliverability

- Ensure emails comply with anti-spam laws (e.g., CAN-SPAM, GDPR).
- Tools to maintain high deliverability and reduce bounce rates.

**Benefit:** Protect your sender reputation and reach your audience reliably.

## 7. Integration with SOMBI Ecosystem

- Sync email campaigns with Contacts, Marketing, Memberships, Funnels, and Courses.
- Automatically pull data from registrations, purchases, or interactions for personalized campaigns.

**Benefit:** Streamlines workflows and ensures consistent messaging across all channels.

---

# Steps to Use SOMBI Email Services

## Step 1: Access Email Services

1. Log in to SOMBI.
  2. Navigate to the “Email Services” or “Marketing” & “Emails” tab.
  3. Review existing campaigns or start a new one.
- 

## Step 2: Create a New Email Campaign

1. Click “Create New Campaign”.
  2. Enter campaign name, subject line, and preview text.
  3. Select a template or use the drag-and-drop editor to design the email.
  4. Add images, text, links, buttons, and branding elements.
- 

## Step 3: Segment Your Audience

1. Choose a target audience from your Contacts list.
  2. Apply filters such as tags, behavior, or membership level.
  3. Save the segment for future campaigns.
- 

## Step 4: Configure Automation (Optional)

1. Set triggers for automated sequences (e.g., welcome emails, purchase follow-ups).
  2. Define delays, conditions, or actions for each email in the sequence.
  3. Activate the automation to run continuously.
- 

## Step 5: Test and Preview

1. Send a test email to yourself or a small group.
  2. Check formatting, links, and images on desktop and mobile.
  3. Make necessary adjustments before sending to the full list.
- 

## Step 6: Send or Schedule Campaign

1. Choose to send immediately or schedule for a future date and time.
  2. Confirm the recipient list and settings.
  3. Send or schedule the campaign.
-



## Step 7: Monitor Performance

1. Track email metrics: open rates, click-through rates, bounces, unsubscribes.
  2. Compare performance across campaigns using analytics dashboards.
  3. Optimize future campaigns based on insights.
- 

### Summary:

SOMBI Email Services is a **powerful tool for creating, automating, and analyzing email campaigns**. By following these steps, businesses can **engage audiences, nurture leads, drive conversions, and gain actionable insights**, all within the SOMBI ecosystem.

# WhatsApp

## SOMBI WhatsApp: Connect, Communicate, and Automate

The **WhatsApp** feature in SOMBI allows businesses to **communicate directly with customers, leads, and team members** via WhatsApp, while integrating with Contacts, Conversations, Automation, and Marketing. It is designed to centralize messaging, enhance engagement, and automate communication efficiently.

---

### Key Features of SOMBI WhatsApp

#### 1. Centralized Messaging

- Receive and send WhatsApp messages directly from the SOMBI platform.
- View all conversations in one dashboard alongside other channels.

**Benefit:** Avoids switching between apps and keeps all communication in one place.

#### 2. Automated Messaging & Workflows

- Set automated replies, follow-ups, or notifications based on triggers.
- Integrate WhatsApp messages into sales funnels, appointments, or onboarding sequences.

**Benefit:** Saves time and ensures consistent responses to leads and customers.

#### 3. Broadcast & Campaign Messaging

- Send messages to multiple contacts at once (broadcasts) while adhering to WhatsApp rules.
- Segment recipients based on tags, membership, or engagement history.

**Benefit:** Engage large audiences quickly and efficiently.

#### 4. Rich Media Support

- Send images, videos, documents, PDFs, links, and emojis.
- Enhance communication with visually engaging content.

**Benefit:** Makes messages more interactive and professional.

#### 5. Integration with Contacts & Opportunities

- Link WhatsApp conversations to contacts and sales opportunities.
- Automatically log conversations in the contact history.

**Benefit:** Ensures context is preserved for sales follow-ups and customer service.

#### 6. Analytics & Reporting

- Track message delivery, read status, response time, and engagement.
- Monitor performance of automated sequences and campaigns.

**Benefit:** Provides insights for improving communication and response strategies.

## 7. Security & Compliance

- Ensure communication follows WhatsApp Business API rules and privacy regulations.
- Maintain data security for conversations and media files.

**Benefit:** Protects customer information and your business reputation.

---

# Steps to Use SOMBI WhatsApp

## Step 1: Access WhatsApp Integration

1. Log in to SOMBI.
  2. Navigate to “Conversations” → “WhatsApp” or the WhatsApp module.
  3. Connect your WhatsApp Business account through the API.
- 

## Step 2: Connect Contacts

1. Sync your contacts from SOMBI or import new contacts.
  2. Tag or segment contacts based on behavior, membership, or opportunities.
  3. Ensure each contact has opted-in to receive WhatsApp messages.
- 

## Step 3: Send Individual or Broadcast Messages

1. Open a contact or segment.
  2. Compose a message with text, images, documents, or links.
  3. Send immediately or schedule for a specific date and time.
- 

## Step 4: Set Up Automated Messages

1. Go to the **Automation** section.
  2. Define triggers such as:
    - New lead or contact added
    - Appointment confirmation
    - Payment received or overdue
  3. Compose automated messages and assign them to triggers.
  4. Activate the workflow.
- 

## Step 5: Monitor Conversations

1. Use the SOMBI Conversations dashboard to view all WhatsApp interactions.
  2. Track response times, unresolved messages, and engagement metrics.
  3. Assign follow-ups to team members if needed.
- 

## Step 6: Analyze Performance

1. Check delivery, read, and reply statistics for individual or broadcast messages.
2. Evaluate the effectiveness of automated sequences.
3. Adjust messaging, timing, or workflows based on insights.

---

**Summary:**

SOMBI WhatsApp integration is a **powerful communication tool** that allows businesses to **connect, engage, and automate messaging** with leads and customers. By following these steps, you can **centralize conversations, implement automation, monitor engagement, and improve customer interactions** within the SOMBI ecosystem.

# Integrations

## SOMBI Integrations: Connect Your Tools Seamlessly

The Integrations feature in SOMBI allows businesses to connect third-party tools, applications, and services with the SOMBI platform. This enables centralized workflows, automation, and data synchronization across marketing, sales, payments, and operations.

---

### Key Features of SOMBI Integrations

#### 1. Connect Third-Party Apps

- Integrate with tools for email marketing, CRM, payment gateways, analytics, social media, and more.
- Examples: Stripe, PayPal, Mailchimp, Google Calendar, Zoom, WhatsApp Business API.

**Benefit:** Streamlines workflows by keeping all tools connected and synchronized.

#### 2. Automation & Webhooks

- Use webhooks to trigger actions in external apps based on SOMBI events (e.g., new contact, payment received).
- Connect with automation platforms like Zapier or Make for custom workflows.

**Benefit:** Automates repetitive tasks and reduces manual work.

#### 3. Data Synchronization

- Sync contacts, leads, payments, and course enrollments between SOMBI and other platforms.
- Ensure data consistency across all tools and applications.

**Benefit:** Maintains accurate, up-to-date records in multiple systems.

#### 4. Payment Gateway Integration

- Accept payments through multiple gateways such as Stripe, PayPal, or local banking solutions.
- Enable recurring payments, subscriptions, or one-time transactions.

**Benefit:** Increases payment flexibility and ensures smooth revenue collection.

#### 5. Marketing & Communication Tools

- Integrate email services, SMS providers, and social media accounts.
- Automate campaigns, notifications, and customer engagement workflows.

**Benefit:** Centralizes marketing efforts and improves campaign efficiency.

#### 6. Course & Membership Platforms

- Connect SOMBI Digital Courses or Membership modules to external LMS or learning platforms if needed.
- Sync enrollments, progress, and access control automatically.

**Benefit:** Ensures learners or members have seamless access across systems.

## 7. Analytics & Reporting Tools

- Integrate Google Analytics, Facebook Pixel, or other tracking tools.
- Monitor performance of campaigns, funnels, and business metrics in real-time.

**Benefit:** Provides actionable insights for data-driven decision-making.

---

# Steps to Set Up Integrations in SOMBI

## Step 1: Access the Integrations Tab

1. Log in to SOMBI.
  2. Navigate to “**Settings**” > “**Integrations**” in the main menu.
  3. Review existing integrations and available apps.
- 

## Step 2: Choose an Integration

1. Select the app or service you want to integrate (e.g., Stripe, Mailchimp, Google Calendar).
  2. Click “**Connect**” or “**Set Up Integration**”.
- 

## Step 3: Authenticate and Authorize

1. Enter login credentials for the third-party app.
  2. Grant necessary permissions for SOMBI to access data.
  3. Confirm connection and test access.
- 

## Step 4: Configure Integration Settings

1. Map data fields between SOMBI and the external app (e.g., contact name, email, payment amount).
  2. Choose triggers and actions for automation (e.g., new contact > add to Mailchimp list).
  3. Save configuration settings.
- 

## Step 5: Test the Integration

1. Perform a test action (e.g., add a new contact or make a payment).
  2. Verify that the data syncs correctly between SOMBI and the integrated app.
  3. Adjust settings if needed.
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## Step 6: Monitor and Optimize

1. Track data flow and automation performance from SOMBI dashboard.
  2. Check logs or error reports for failed integrations.
  3. Optimize workflows and update integration settings as business needs evolve.
- 

### Summary:

SOMBI Integrations is a central hub for connecting your favorite tools and platforms, enabling

seamless workflows, automated processes, and accurate data synchronization. By following these steps, businesses can **maximize efficiency, streamline operations, and ensure all systems work together cohesively.**

# Tags

## SOMBI Tags: Organize, Segment, and Target

The Tags feature in SOMBI allows businesses to categorize contacts, opportunities, memberships, courses, and other records using customizable labels. Tags help streamline organization, enable precise targeting, and enhance automation and marketing workflows.

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### Key Features of SOMBI Tags

#### 1. Customizable Tags

- Create tags based on behavior, demographics, lead stage, membership type, or any category you define.
- Apply multiple tags to a single contact or record.

**Benefit:** Organizes your data logically and enables efficient segmentation.

#### 2. Segmentation & Filtering

- Filter contacts, opportunities, or course participants by tags.
- Use tags to create dynamic lists for campaigns, follow-ups, or reporting.

**Benefit:** Helps target the right audience with tailored messaging and campaigns.

#### 3. Integration with Automation

- Trigger automated workflows based on tags (e.g., new lead tagged “Hot” → send welcome email).
- Update tags automatically based on user behavior or engagement.

**Benefit:** Improves efficiency and ensures relevant interactions without manual work.

#### 4. Marketing Campaign Targeting

- Use tags to send segmented email campaigns, SMS, or WhatsApp messages.
- Create personalized offers, reminders, or upsells based on tags.

**Benefit:** Increases engagement and conversion rates by reaching the right audience.

#### 5. Tracking & Analytics

- Monitor how tagged contacts progress through pipelines, courses, or memberships.
- Analyze the performance of campaigns and automated workflows by tag.

**Benefit:** Provides insights to optimize marketing, sales, and engagement strategies.

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## Steps to Use SOMBI Tags

### Step 1: Access the Tags Section

1. Log in to SOMBI.



2. Navigate to **Contacts, Opportunities, Courses, or Memberships**.
  3. Click **"Tags"** or the tagging option in the record management area.
- 

## Step 2: Create a New Tag

1. Click **"Create Tag"**.
  2. Enter a descriptive name for the tag (e.g., "Hot Lead", "VIP Member", "Course Completed").
  3. Optionally, assign a color for easy visual identification.
  4. Save the tag.
- 

## Step 3: Apply Tags to Records

1. Open a contact, opportunity, course participant, or member record.
  2. Select **Add Tag** and choose from existing tags.
  3. Multiple tags can be applied to a single record for detailed categorization.
- 

## Step 4: Use Tags for Segmentation

1. Filter lists using tags to view specific groups.
  2. Create dynamic lists or audiences for campaigns, automation, or reporting.
  3. Save filtered lists for repeated use in workflows or campaigns.
- 

## Step 5: Integrate Tags with Automation

1. Navigate to **Automation** in SOMBI.
  2. Set triggers based on tags (e.g., tag applied → send email, assign opportunity, or notify staff).
  3. Activate workflows for real-time automation.
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## Step 6: Monitor Tag Performance

1. Track tagged contacts or records through dashboards or reports.
  2. Analyze engagement, conversions, or progress of each tag group.
  3. Adjust tag usage or campaigns based on insights.
- 

### Summary:

SOMBI Tags is a powerful tool for organizing, segmenting, and targeting your contacts and records. By using tags, businesses can streamline operations, enhance automation, personalize marketing campaigns, and gain actionable insights, ensuring that the right message reaches the right audience at the right time.

# Brand Boards

## SOMBI Brand Boards: Centralize and Standardize Your Brand

The **Brand Boards** feature in SOMBI allows businesses to **create, store, and manage all brand assets and guidelines** in one centralized location. This ensures consistency across marketing, communication, digital courses, websites, and social media.

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### Key Features of SOMBI Brand Boards

#### 1. Centralized Brand Assets

- Upload logos, images, videos, fonts, and color palettes.
- Store templates for emails, social media posts, and documents.

**Benefit:** Keeps all brand materials organized and easily accessible for your team.

#### 2. Brand Guidelines

- Define and document brand rules such as logo usage, colors, fonts, and tone of voice.
- Ensure all team members and collaborators follow the same standards.

**Benefit:** Maintains brand consistency across all channels and communications.

#### 3. Collaboration & Access Control

- Share brand boards with team members, designers, or agencies.
- Control access and editing permissions for each user.

**Benefit:** Ensures team collaboration while protecting brand integrity.

#### 4. Integration with SOMBI Modules

- Use brand assets directly in Marketing, Email, Courses, Websites, Funnels, and Social Media campaigns.
- Apply consistent colors, logos, and templates automatically.

**Benefit:** Saves time and ensures every communication or campaign aligns with your brand.

#### 5. Version Control & Updates

- Keep track of asset versions and updates.
- Replace or update files without breaking workflows or templates.

**Benefit:** Ensures your team always uses the most current brand materials.

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## Steps to Use SOMBI Brand Boards

### Step 1: Access the Brand Boards Tab

1. Log in to SOMBI.
  2. Navigate to “**Brand Boards**” in the main menu.
  3. Click “**Create New Brand Board**” to start setting up your brand assets.
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## Step 2: Add Brand Assets

1. Upload your logo files (PNG, JPG, SVG) and brand images.
  2. Add fonts, color codes, templates, and other visual assets.
  3. Organize assets by category (e.g., logos, social media, email templates).
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## Step 3: Define Brand Guidelines

1. Create guidelines for logo usage, colors, fonts, and typography.
  2. Include instructions for tone of voice, imagery, and communication style.
  3. Save the guidelines within the brand board for reference.
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## Step 4: Set Permissions

1. Assign team members who can view or edit the brand board.
  2. Restrict editing rights to protect important brand assets.
  3. Share read-only access with collaborators or external agencies if needed.
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## Step 5: Use Brand Assets in SOMBI

1. When creating campaigns, emails, courses, websites, or funnels, access the brand board to select logos, colors, and templates.
  2. Apply brand assets consistently across all projects.
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## Step 6: Update and Maintain

1. Replace outdated logos, templates, or images with new versions.
  2. Update brand guidelines if rules change.
  3. Notify your team of changes to ensure everyone uses the updated assets.
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### Summary:

SOMBI Brand Boards is a **centralized hub for storing, managing, and applying your brand assets and guidelines**. By using Brand Boards, businesses can **ensure consistent branding, streamline team collaboration, and save time when creating campaigns, emails, courses, websites, and funnels**.