



Software by Design

Nextcloud apps

Kunden · Deals · Chase & Coaching

CustomerCheck

User manual

End-user documentation for the web app

Heute, Pipeline, Posteingang, Verlängerungen und Team-Coaching.

App version

1.6.190

Language

English

Date

26. August 2026

Contents

Introduction	iv
1 Roles and permissions	1
1.1 Overview	1
1.2 App door and app administrator	1
1.3 Workspace roles	1
1.4 One workspace	2
1.5 What roles do not mix	2
2 First steps	3
2.1 Sign in	3
2.2 After opening	3
2.3 Navigation by role	4
2.3.1 May manage team	4
2.3.2 May edit	5
2.3.3 View only	5
2.4 Overview for the first day	5
3 Today, overview and This week	7
3.1 Today	7
3.2 Overview (Pulse)	8
3.3 This week (Brief)	8
3.3.1 Flow: set commitment and review last week	8
4 Companies and 360° view	9
4.1 Company list	9
4.2 Create a company	9
4.3 360° view	10
4.4 People	11
4.5 Merge	11
4.6 Export and delete (GDPR)	11
4.7 Archive	11
5 Deals	13
5.1 Open pipeline	13
5.2 Stages	13
5.3 Create and edit a deal	13
5.4 Claim	14
5.5 Loss reasons	14
5.6 Follow-up sequences and checklists	14

6	Licences, renewals and money	15
6.1	Licences & renewals	15
6.1.1	Reminder chain	15
6.1.2	Partner hours	15
6.2	Money	15
6.3	How it fits together	16
7	Tasks, My customers and Plans	17
7.1	Tasks (to-dos and activities)	17
7.2	My customers	17
7.3	Plans / strategy	18
8	Inbox	19
8.1	Sales inbox	19
8.2	Assign	19
8.3	My e-mail	19
8.4	Compose and send	20
8.5	Configure sources	20
9	Team and coaching	21
9.1	For whom	21
9.2	Read the board	21
9.3	OOO cover	21
9.4	Redistribution	21
9.5	Escalations	22
9.6	1:1 preparation	22
10	Import and conflicts	23
10.1	Import	23
10.2	Conflicts	23
11	Team & mailbox and workspace settings	25
11.1	My e-mail	25
11.2	Team mailbox / Team & mailbox	25
11.3	Settings (Preferences)	26
11.4	Checklists	26
11.5	Assignment sources	27
11.6	Commitments (weekly commitment review)	27
11.7	Integrations	27
12	App settings	28
12.1	Access	28
12.2	Reminders	29
12.3	Feeds	29
12.4	Licence	30
12.5	Agreement catalogue	30
12.6	Personal e-mail OAuth	30

13 Complete paths by role	31
13.1 View only path	31
13.2 May edit path	31
13.3 May manage team path	31
13.4 App administrator path	31
14 Errors, empty states and messages	32
14.1 Validation	32
14.2 Empty states	32
14.3 Concurrency and rights	32
14.4 Network and export	32
15 Access denied	33
15.1 Fail-closed with empty allowlist	33
15.2 What you can do	33
16 Accessibility	34
16.1 Keyboard and screen width	34
16.2 Notes	34
17 Frequently asked questions	35
18 Glossary	36
19 Coverage catalogue	37
About Software by Design	38
Support & how to contribute	39

Introduction

CustomerCheck is a Nextcloud app for customer work on your own instance: a common customer book, deals and renewals, inbox with allocation, Daily and weekly rituals as well as team coaching - without Salesforce and without the Replace the accounting of sister apps.

Bookings and receipts remain in ProjectCheck, InvoiceCheck and TicketCheck; Files, mail and tasks in the Nextcloud groupware apps. CustomerCheck connect these sources and show what's up now.

The web interface is free of charge (AGPL). The optional Companion app is required a separate Mobile license and is not the subject of this manual.

Audience

- Employees with access to CustomerCheck (roles) **Nur ansehen, Darf bearbeiten, Darf Team verwalten**),
- workspace managers (team, mailbox, coaching),
- app administrators (access, feeds, mobile license).

What you need

- Nextcloud account with access to CustomerCheck,
- current browser with JavaScript,
- for app settings: app administrator right (or Nextcloud system administration),
- Optional: ProjectCheck, InvoiceCheck, TicketCheck for linked 360° views.

How to read this manual

- **Role matrix:** Chapter 1 — who sees what.
- **Everyday (Members):** Chapter 2 up to 7, plus inbox and error/FAQ.
- **Manager:** additionally Team, Team & Mailbox, Conflicts, Import.
- **App administrators:** Chapter 12.
- **Complete paths per role:** Chapter 13.

App version for this manual

CustomerCheck **1.6.190** Commit e85dbad), as of 26 August 2026, language English.

CHAPTER 1

Roles and permissions

CustomerCheck separates the *app door* (who may open the app at all) from *workspace roles* (who may read or change customers, deals and inbox). In this version there is **one** organisation workspace — without a workspace switcher.

1.1 Overview

Capability	View only	May edit	May manage team
Read customer book, deals, overview	yes	yes	yes
Create/change companies, people, deals, tasks	no	yes	yes
Delete company (GDPR) / archive	no	no	yes
Manage members & team mailbox	no	no	yes
Read / assign inbox	yes	yes	yes
Send from team mailbox	no	yes (default)	yes
This week: add commitments	no	own	yes
Team board, OOO, redistribution, escalations	no	own row only	yes
Resolve conflicts	no	no	yes
App settings	no	no	no ¹

App administrators may perform the same workspace-wide actions as managers and additionally maintain the app door, feeds, licence and catalogue.

1.2 App door and app administrator

You are an app administrator if you are a Nextcloud system administrator or listed under **App settings** → **Access** as a CustomerCheck app administrator.

Under **Access mode** choose:

Open — every signed-in user can open the app CustomerCheck appears in the menu for all signed-in accounts (not recommended for sales data).

Restricted — only allowlisted users and groups can open the app Only allowed users and groups plus app/system admins.

If restriction is active and the allowlist is empty, **only** app administrators can use the app (fail-closed). Other accounts see **Access denied** (Chapter 15).

1.3 Workspace roles

View only Read customer book, overview, inbox and company 360°. No write actions; team board cannot be opened.

¹App settings only with app administrator rights or Nextcloud system administration — independent of workspace role.

May edit Create and change companies, people, deals, tasks and commitments (own); send mail; import; team board with own row only.

May manage team Additionally members, team mailbox, checklist templates, assignment sources, commitment review, team coaching (all rows), OOO, redistribution, conflicts, GDPR delete.

1.4 One workspace

With the current configuration there is no multi-organisation and no switcher in the sidebar. The active workspace is fixed; companies belong exactly to this book.

1.5 What roles do not mix

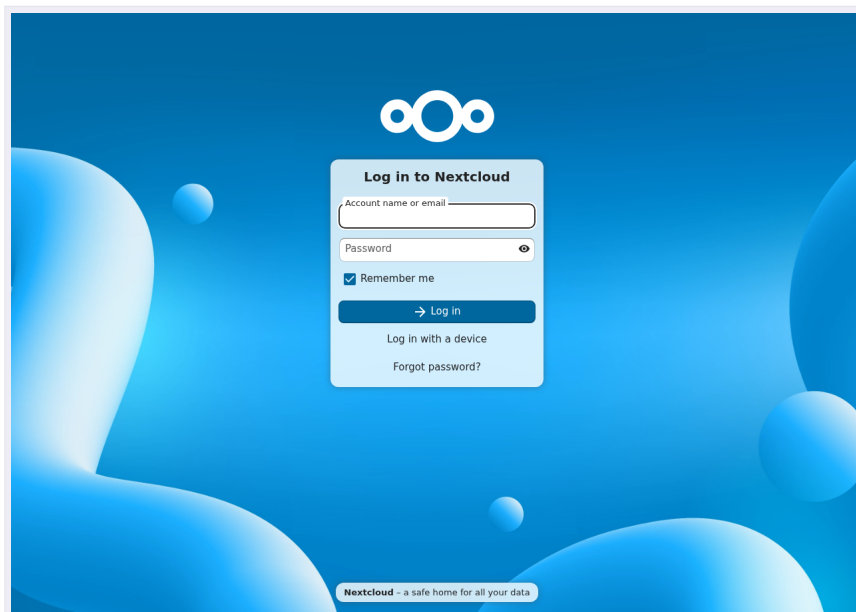
- Internal weekly commitments (**This week**) are different from **Customer promises** to the customer.
- OOO cover lets backup people see work — ownership (account/deal owner) stays unchanged.
- Forecast buckets on deals are planning labels, not cash on hand.

CHAPTER 2

First steps

2.1 Sign in

1. Open your Nextcloud address in the browser.
2. Sign in with username and password.
3. Open the **CustomerCheck** app in the app menu (or via the direct app URL).



Marker 1: username, marker 2: password.

If your account is not allowed, **Access denied** appears — Chapter 15.

2.2 After opening

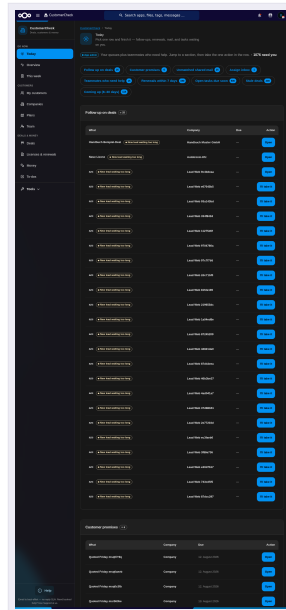
The usual entry is **Today**: queues for deals, commitments, contacts, renewals and mail. The sidebar is grouped:

Do now Today, Overview, This week

Customers My customers, Companies, Plans, optionally **Team**

Deals & money Deals, Licences & renewals, Money, Tasks

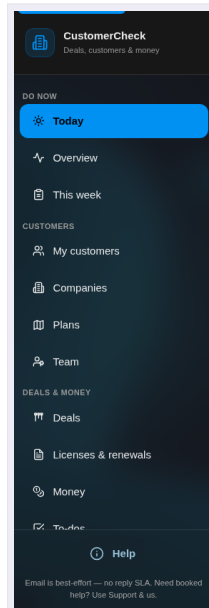
Tools Inbox, My e-mail, Conflicts, optionally **Import**, optionally **Team & mailbox**, optionally **App settings, Get app, Help & Support**



2.3 Navigation by role

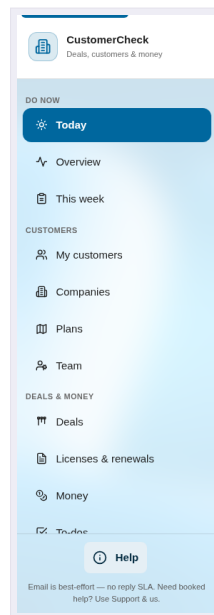
2.3.1 May manage team

You additionally see **Team**, **Team & mailbox** and optional admin tools. Under **Today**, team members who need help also appear.



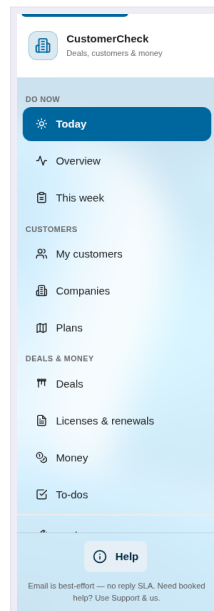
2.3.2 May edit

Daily path: **Today** → company → deal or task. **Import** is visible; **App settings** and **Team & mailbox** are missing.



2.3.3 View only

Read without write buttons. **Import** is missing. **Team** does not appear.



2.4 Overview for the first day

1. As manager: check members and optionally team mailbox under **Team & mailbox** (Chapter 11).
2. Create or import companies (Chapters 4, 10).
3. Work through **Today** in the morning; use **Overview** and **Deals** as needed.

4. Optionally on Mondays **This week:** set commitments and review last week (Chapter 3).
Full reading paths by role: Chapter 13.

CHAPTER 3

Today, overview and This week

Three entries under **Do now**: what is due *now*, how the book stands, and which weekly commitments apply.

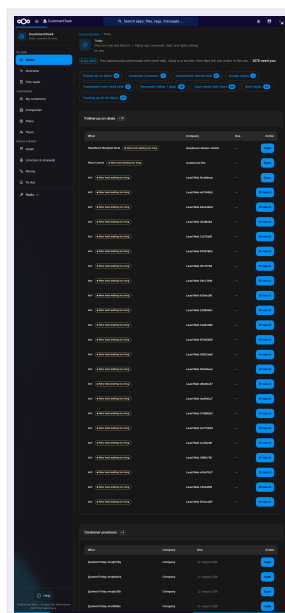
3.1 Today

Open **Today**. The page collects queues — depending on role and data, including:

- **Chase deals**
- **My commitments this week**
- **Contact customers / Customer promises**
- **My deal tasks** and **Plans that need attention**
- **Unassigned shared mail / Assignment inbox**
- **Conflicts**
- for managers: **Team members who need help**
- plus classic lists such as overdue callbacks, renewals, overdue invoices, due tasks

Per row: content, company, due date and an action — typically **Open**, **Done**, **I'll take it**, **Assign mail** or **Help team member**.

1. Jump to the first non-empty queue.
2. Open the company or complete the row action.
3. Repeat until *All done* or no open entries remain.



As **View only** you can open and read rows; write actions stay locked.

3.2 Overview (Pulse)

Overview shows customer book health: metrics on companies, overdue and open money, uninvoiced hours (when ProjectCheck can deliver honestly), renewals, pipeline and an attention list. Missing links to sister apps appear as **Missing links**.

- Numbers come from linked apps and licences — no tax audit in the UI.
- If a sister app is missing, the section stays quiet with a short note instead of a broken page.
- Pipeline euros are not expected cash.

3.3 This week (Brief)

This week limits weekly work: typically a few own commitments (WIP limit, often 5). You see the current week status, last week review and optionally expected money from overdue receivables and known renewal amounts — not from the pipeline.

3.3.1 Flow: set commitment and review last week



1. Open **This week**.
2. Under **Add commitment**: enter title or tap a ready commitment; save with **Add to this week**.
3. If the limit is full: finish or drop a commitment first.
4. For open last-week entries: **Done** (with optional proof under **More**) or **Missed, Carry over** or **Drop**.

Members usually confirm and review only *own* commitments. Viewers read the page without a form (**Read only**).

CHAPTER 4

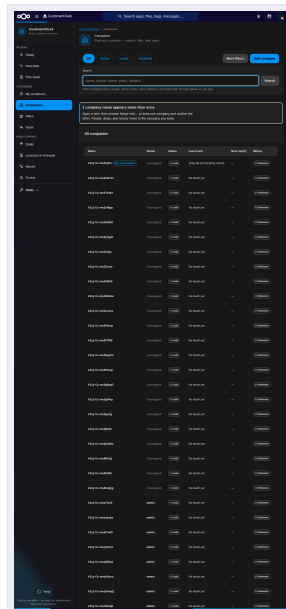
Companies and 360° view

4.1 Company list

Open **Companies**. The list is the full customer register of the workspace. Filter by status or **Archived**; search by name.

1. Optionally set filters (**More filters**).
2. Open a row to see the 360° view.
3. With write access: **Add company** / **New company**.

Empty state: *No companies yet.*



4.2 Create a company

1. Choose **Add company**.
2. Enter at least the name — you become account owner; address and other fields are optional.
3. Save and add people and deals as needed.

The short name (slug) is the permanent key and cannot be changed later.

4.3 360° view

The company page bundles the customer. Top: name, status, coverage/next contact, actions **Edit**, **Export** and under **More** optionally **Merge with...**, **Archive** or **Restore** and **Delete (GDPR)**.

Tabs:

Today Open items for this customer (tasks, promises, deals, mail).

People Roster with buying roles and primary contact.

Deals Opportunities and stages.

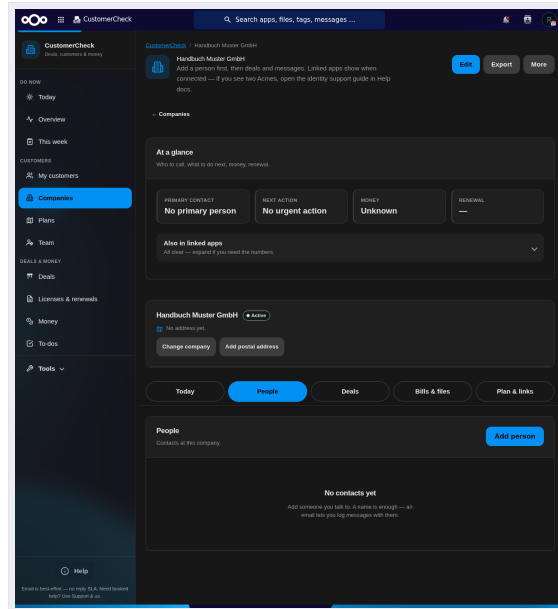
Invoices & files Money signals and files (InvoiceCheck/Files when linked).

Plan & links Account plan and links to ProjectCheck, TicketCheck, etc.

4.4 People

Under **People**:

1. **Add person** (name is enough; e-mail helps with mail assignment).
2. Set buying role and status; at most one active economic buyer role.
3. Mark primary contact.



4.5 Merge

Duplicate companies in the same workspace:

1. In the source company under **More** → **Merge with...** choose the target company.
2. Confirm. People, deals and history move to the kept company; the source is archived.

Archived companies cannot be a source — restore first or choose an active target company.

4.6 Export and delete (GDPR)

Export Downloads a data export of the company (*Export downloaded.* on success).

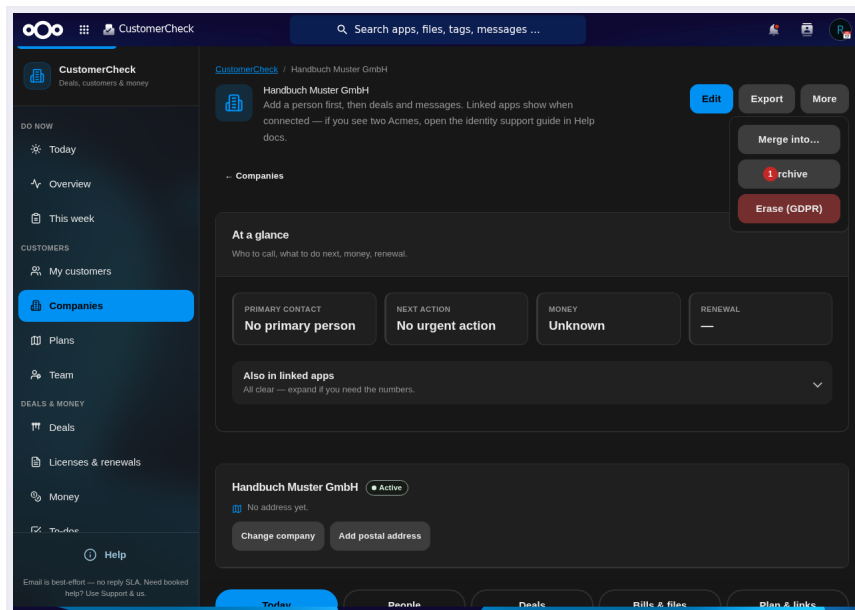
Delete (GDPR) Under **More**; confirm with **Delete**. Only with delete rights (manager/app admin).

4.7 Archive

With delete rights (**May manage team** / app admin) under **More**:

1. Active company: **Archive** — confirmation; the company disappears from active lists.
2. Archived company: **Restore** — back to the active register.

Additionally: filter in the company list with **Archived** / **Show archived only**. **Merge with...** archives the source company automatically. Success messages in history: *Company archived* / *Company restored*.



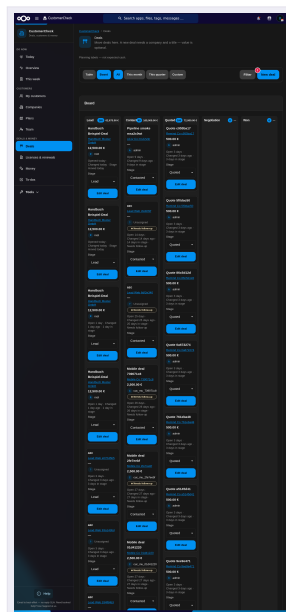
Under **More**: **Archive** (marker when visible) next to merge and GDPR delete.

CHAPTER 5

Deals

5.1 Open pipeline

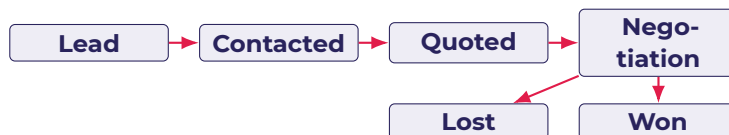
Under **Deals & money** → **Deals** you see all opportunities as **Table** or **Board** (personal setting under workspace → **Settings**). Each deal has an owner.



Empty state: *No deals yet.*

5.2 Stages

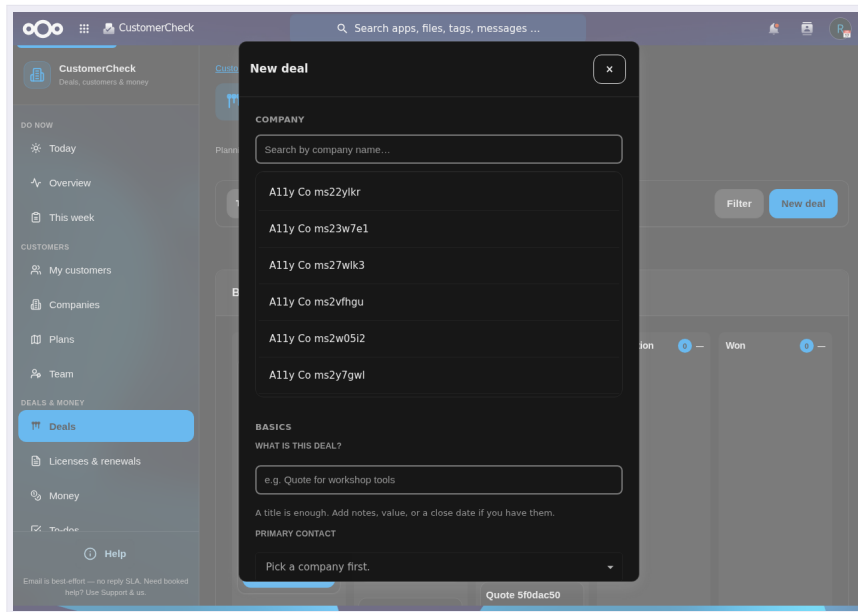
Fixed stages (won/lost are end stages — no reopening):



Invalid stage: *Unknown pipeline stage.*

5.3 Create and edit a deal

1. From the pipeline or company 360° **New deal**.
2. Set title — if missing: *Enter a deal title*.
3. Company, stage, owner, optional quote date / forecast bucket.
4. Save. Marked required errors: *Please correct the highlighted fields*.



5.4 Claim

Open deals without an owner can be claimed with **I'll take it** (e.g. under **Today**). Success: *Deal claimed*. Parallel attempt: note that someone else just claimed the deal — reload.

5.5 Loss reasons

When marking as **Lost**: choose **Loss reason** (*Choose a loss reason code.*). Won and lost deals cannot be reopened — create a new deal instead.

5.6 Follow-up sequences and checklists

For stages like contacted / quoted / negotiation / won, fixed follow-up steps can be generated (once). On the deal, **Checklist** tasks from templates (Chapter 11); completion also appears under **Today**.

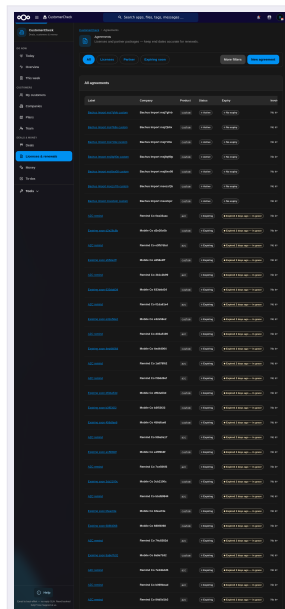
CHAPTER 6

Licences, renewals and money

6.1 Licences & renewals

Open **Licences & renewals**. Here are agreements (licence, partner, one-off) with expiry and status.

1. Narrow the list by status or search.
2. Open an agreement or create a new one (product code from the **Agreement catalogue**).
3. Keep renewals in view via the reminder chain.



6.1.1 Reminder chain

CustomerCheck reminds exactly once per agreement snapshot at offsets **60 / 30 / 7 / 0 / +7** days relative to expiry (including grace hints in the text). Notifications and optional ICS feeds (Chapter 12) feed calendar and digest.

6.1.2 Partner hours

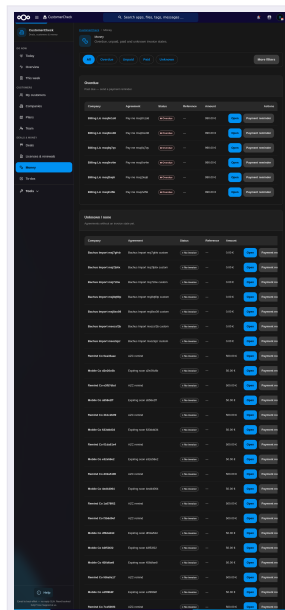
Partner contingents are booked in **15-minute** steps. From about **80 %** utilisation a warning appears (once per agreement period). Changes to hour bookings are time-limited.

Empty state: *No agreements yet* or *No licences yet*.

6.2 Money

Money shows invoice-related signals from InvoiceCheck (overdue first), provided the app is linked and the customer is mapped. CustomerCheck does not invent amounts: if honest data is missing, the section stays quiet or blocks instead of a fake € 0.

1. Open overdue items and follow up in InvoiceCheck or the company 360°.
2. Reset filters with hints like **Show all money** when the list looks empty.



6.3 How it fits together

| Signal | Source | |———|———| | Open / overdue invoices | InvoiceCheck | | Uninvoiced hours | ProjectCheck (honest or blocked) | | Renewals & partner hours | CustomerCheck agreements | | Forecast pipeline | planning only — not as cash in **This week** |

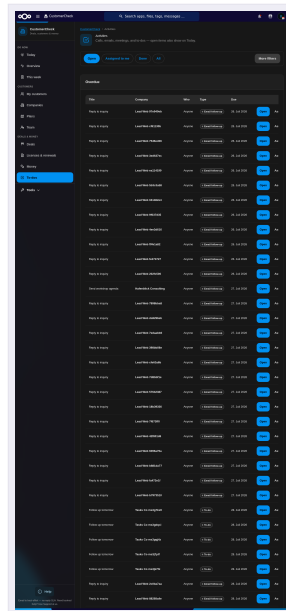
Tasks, My customers and Plans

7.1 Tasks (to-dos and activities)

Under **Tasks** you see calls, e-mails, meetings and tasks of the workspace. Open items also appear under **Today**.

1. Optionally filter (**More filters**) or quickly **Assigned to me**.
2. Open a row or create an activity in the company 360°.
3. When creating, choose **Who should do this?** (default: yourself). Colleagues receive a notification.
4. Reassign in the list with **Assign**; due reminders go only to the assigned person (not the whole workspace).
5. Optionally send to Nextcloud Tasks (**Also send to Tasks** / **Sent to Tasks**).

Empty state: *No tasks yet*. Note: activities are usually captured on the company and then appear here.

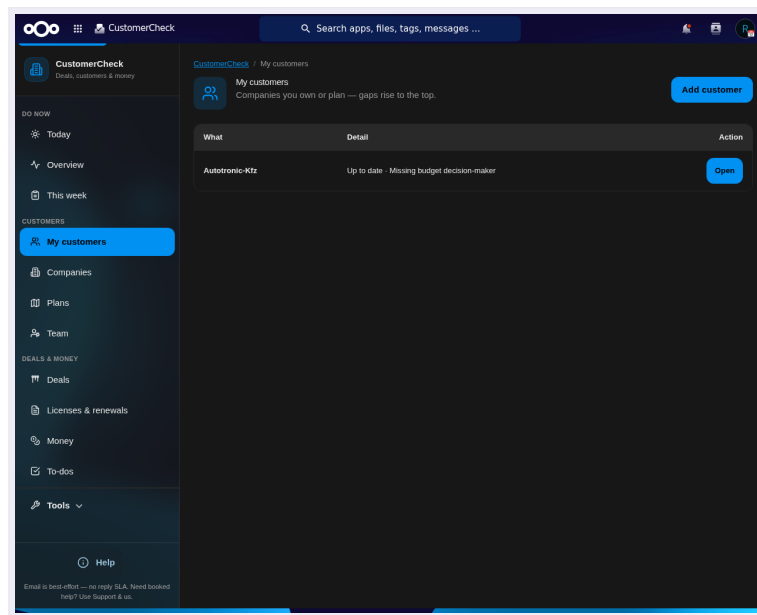


7.2 My customers

My customers shows companies you own or for which you carry the account plan — focusing on coverage gaps and next contact.

1. Review the list; close buying-role gaps (company 360° → **People**).
2. Keep next contact and **Customer promises** current.

Note when the book is empty: *no customers have been assigned to you yet.* (UI wording).

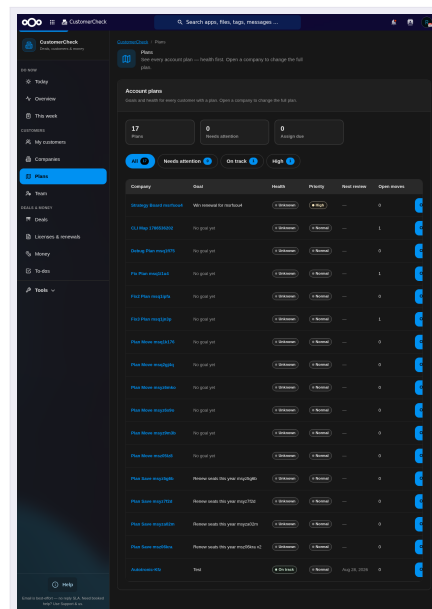


7.3 Plans / strategy

Plans lists account plans across the book: goals, health, next steps (MAP).

1. Open a plan or maintain it in the company 360° under **Plan & links**.
2. Set steps and milestones; stagnant plans appear under **Today** as **Plans that need attention**.

Empty state: *No account plans yet.*



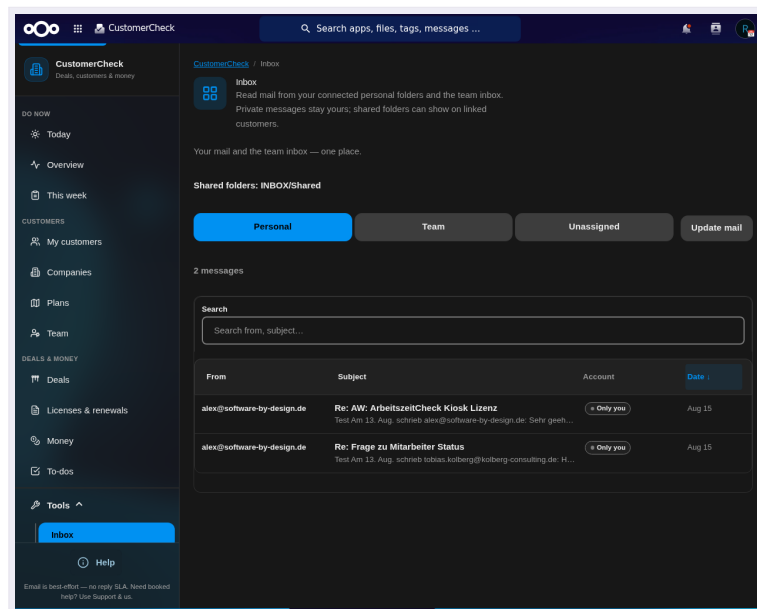
CHAPTER 8

Inbox

8.1 Sales inbox

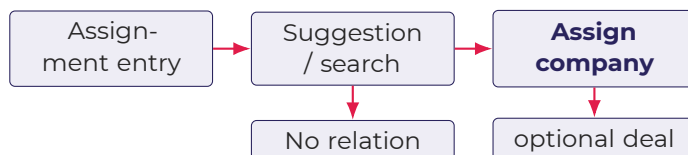
Under **Tools** → **Inbox**, personal and team mail plus unassigned items are in one place: **Personal**, **Team** and **Unassigned**.

- **Team mail** comes from the shared team mailbox; the UI permanently notes that these messages are visible to the team.
- **Personal** related hits stay marked private for you and do not enter the shared index.



8.2 Assign

Unassigned shared mail and optional sources (contacts, files, ...) belong in the assignment flow:

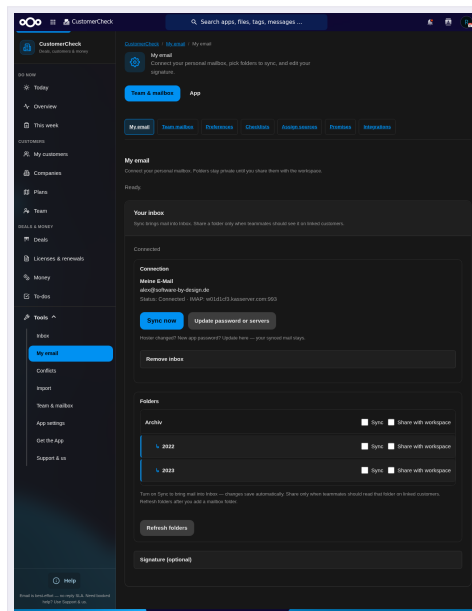


1. Open entry; check suggestion with company name and score (no bare IDs).
2. **Assign to ...** or choose company; optional deal, otherwise overhead marking.
3. Or close as without customer relation / remove from assignment.

Viewers: *View only* — please ask a member to assign.

8.3 My e-mail

My e-mail (tools and workspace settings) connects your personal mailbox (IMAP or OAuth when configured by app admin), folder choice and signature.



8.4 Compose and send

With send rights you can reply or compose from the team mailbox (SMTP). The shared disclosure stays visible. Personal mailboxes: send only from your own account.

8.5 Configure sources

Which inboxes/folders and opt-ins (contacts, files, calendar, tasks, ...) feed assignment are controlled by managers under **Assignment sources** (Chapter 11), including GDPR confirmation.

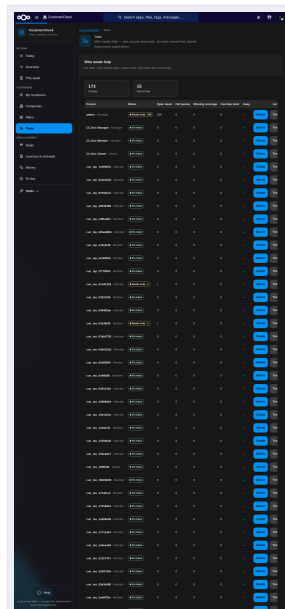
CHAPTER 9

Team and coaching

9.1 For whom

Team appears for roles **May edit** and **May manage team** (and app admins). **View only** cannot open the board (*Viewers cannot open the team board.*).

- **Manager / app admin:** all person rows, stuck score, chase, gaps, OOO, redistribution, escalations, 1:1 prep.
- **Members:** own row only.



The screenshot shows a web application interface for a 'Team' board. On the left, there is a sidebar with a navigation menu containing items like 'Home', 'Team', 'Calendar', 'Reports', and 'Settings'. The 'Team' item is selected and highlighted in blue. The main area displays a table with columns for 'Name', 'Role', 'Status', 'Score', 'Chase', 'Gaps', 'OOO', 'Redistribution', 'Escalations', and '1:1 Prep'. The table contains multiple rows of data, with some cells containing blue circular icons. At the top of the table, there are filters and a search bar. The interface is dark-themed.

9.2 Read the board

Per person, managers typically see stuck hints, chase, old quotes, coverage gaps, overdue items and planning commit euros (label only, not cash). Filter and jump to the person or company.

9.3 OOO cover

Time-limited cover (limited, overlaps rejected): the backup person sees the primary person's open work under **Today** marked **Cover** / Covering — ownership stays with the primary person.

9.4 Redistribution

Managers can reassign deals, account owners and open commitments in bulk (selection size limit, confirmation before proceeding). Atomic step; on parallel change: reload.

9.5 Escalations

When work is blocked: create escalation with reason. Open escalations are limited (workspace cap). Healthy situations resolve escalations automatically.

9.6 1:1 preparation

Choose a team member for 1:1 preparation (*Choose a person for 1:1 preparation.*) — bundled stuck/chase hints for the conversation.

CHAPTER 10

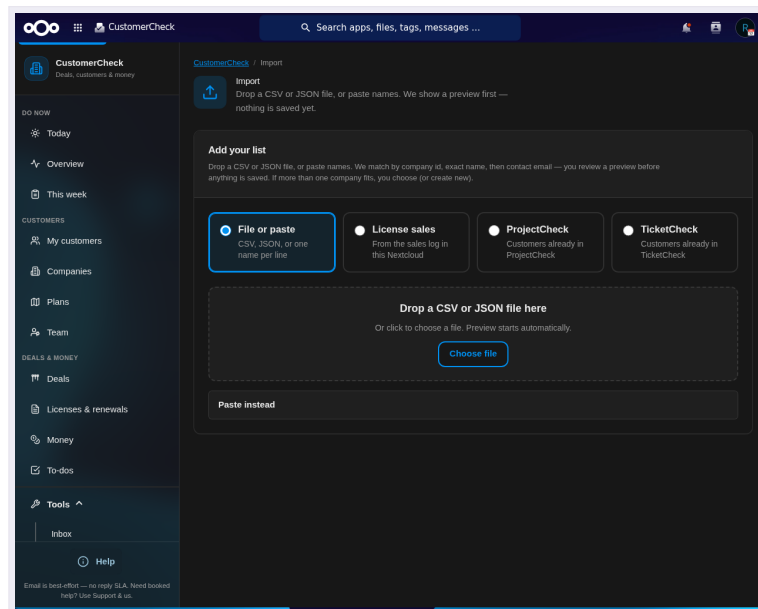
Import and conflicts

10.1 Import

Under **Tools** → **Import** (write access only) you import customers from CSV/JSON, name lists or — when installed — tiles for ProjectCheck, TicketCheck or licence sales log.

1. Choose source or upload file (**CSV, JSON or one name per line**).
2. Check preview: ready rows vs. conflicts/duplicates.
3. Import selection with **Import selection** or **Import 1 ready company**.

Nothing available: *Nothing to import from this source yet.*

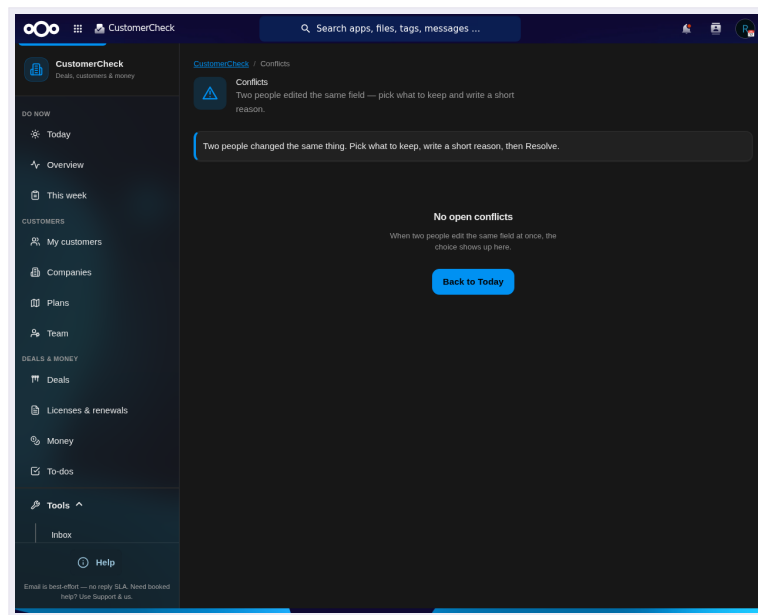


10.2 Conflicts

Parallel changes to company, person, deal or agreement land in **Conflicts** — no silent overwrite. Resolve (manager): three-way compare and **mandatory reason**.

1. Open conflict.
2. Choose desired variant and give reason.
3. Save; the queue under **Today** updates.

Account plans use optimistic locks (`updatedAt`) and refuse silent last-write-wins.



Members without conflict rights see the queue but do not resolve — ask a manager.

Team & mailbox and workspace settings

Reach workspace settings via **Tools** (e.g. **Team & mailbox**, **My e-mail**) or the settings URL. Visible sections depend on role: everyone sees **My e-mail**, **Settings** and **Integrations**; managers additionally mailbox, checklists, assignment sources and commitment review.

11.1 My e-mail

Connect personal mailbox, choose folders for sync, maintain signature. OAuth providers must be configured under app settings first. GDPR confirmation before enabling personal sync.

11.2 Team mailbox / Team & mailbox

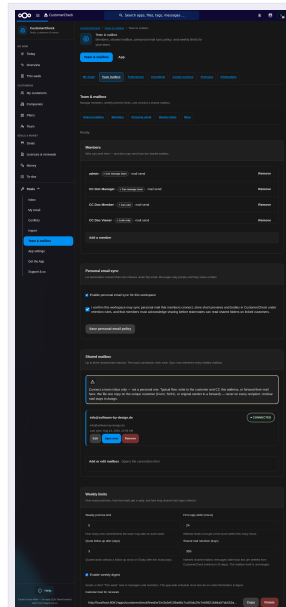
Managers only. Members, shared mailbox and policies:

Members Search person, set role: **View only**, **May edit**, **May manage team**; optional send right.

IMAP / SMTP Host, port, encryption, credentials (usual IMAP 993 SSL, SMTP 465 SSL). Before save: confirm it is a shared team mailbox; GDPR confirmation.

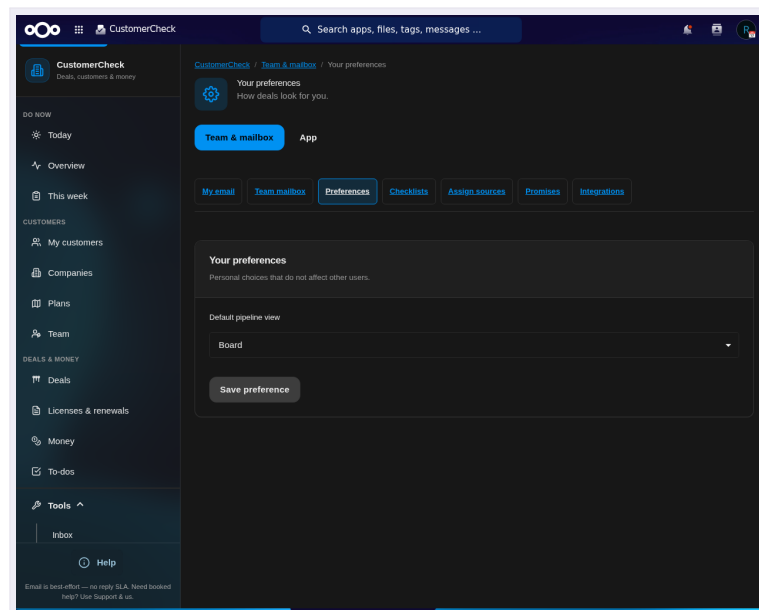
Folders After connection refresh folders and select for sync.

Personal mail policy Whether and how personal syncs are allowed in the team.



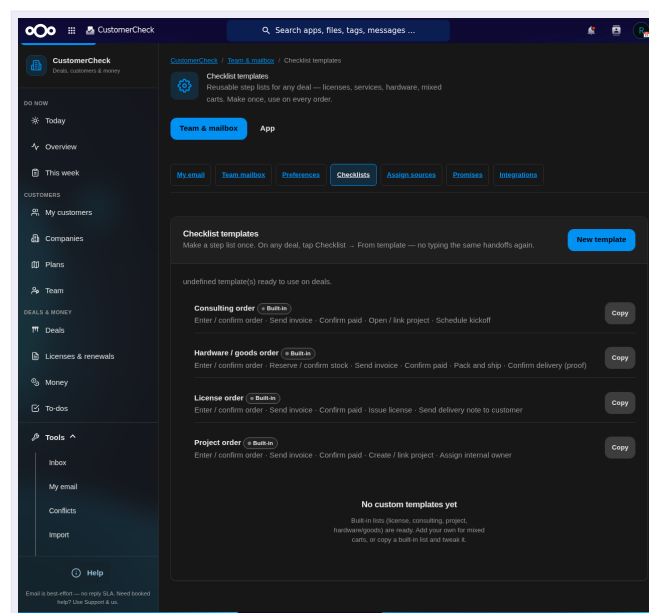
11.3 Settings (Preferences)

Personal preferences, especially **Default pipeline view** (**Table** / **Board**). Save affects your view.



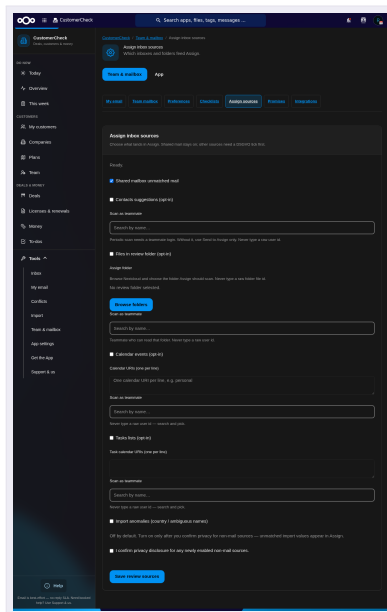
11.4 Checklists

Managers create reusable step lists for deals (licences, services, hardware, mixed baskets). On the deal: apply checklist from template.



11.5 Assignment sources

Which inboxes/folders and opt-ins (contacts, files, calendar, tasks, ...) feed assignment. Per source GDPR confirmation before it becomes active. Optionally archived companies in suggestions.



11.6 Commitments (weekly commitment review)

In settings navigation the entry is **Commitments**; the page title is **Weekly commitment review**. Both are the same section: who owes a weekly commitment review (Circles roll call when Circles is available on the server). Without Circles: corresponding note in the UI.

11.7 Integrations

Linked Check apps and display on companies (ProjectCheck, InvoiceCheck, TicketCheck, ...). Missing apps are silenced, not shown as an error page.

CHAPTER 12

App settings

For app administrators only (Nextcloud system admins or app admins delegated under **Access**). Other roles do not see the menu item.

12.1 Access

Page title **Access control**; navigation **Access**.

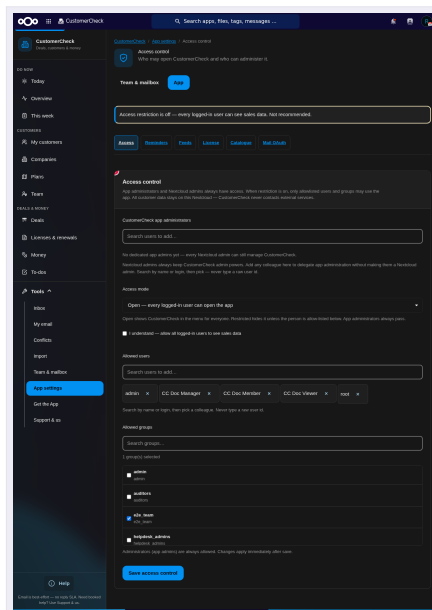
CustomerCheck app administrators Add additional app admins via search (do not type raw user IDs). Without entries, Nextcloud admins remain responsible.

Access mode **Open** — every signed-in user can open the app or **Restricted** — only allowlisted users and groups can open the app.

Confirmation when Open **I understand** — show sales data to all signed-in users.

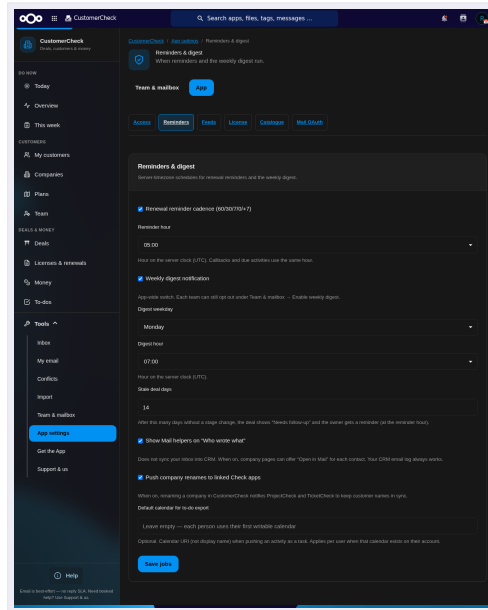
Allowed users / Allowed groups Allowlist when restricted.

Empty allowlist + restriction = fail-closed (app admins only). Details: Chapter 15.



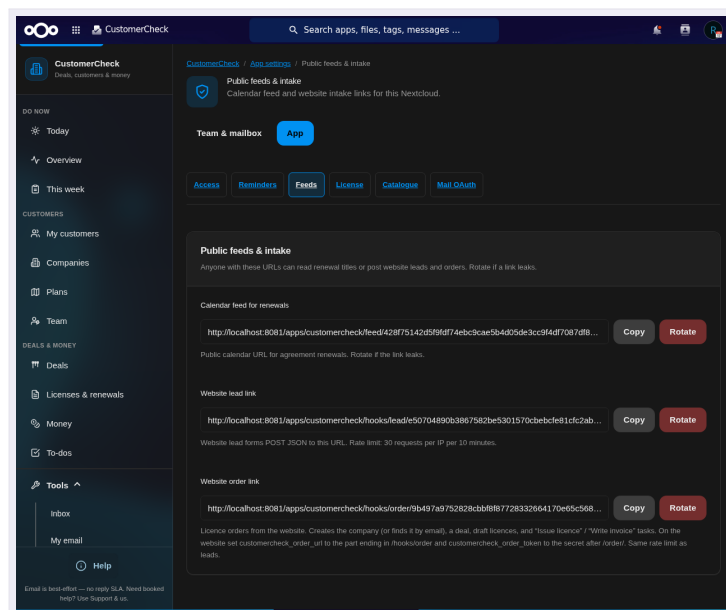
12.2 Reminders

Navigation **Reminders**; title **Reminders & digest**. Times for renewal reminders and the weekly digest (typically opens **This week**).



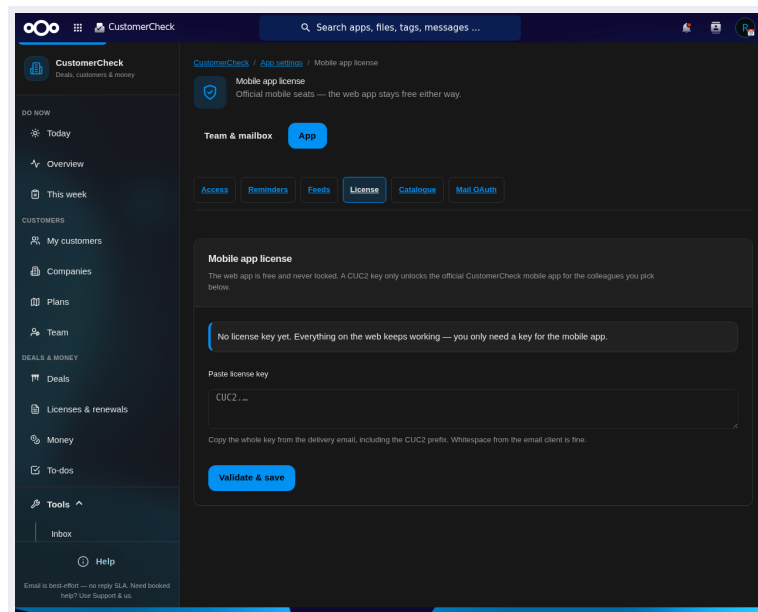
12.3 Feeds

Navigation **Feeds**; title **Public feeds & intake**. Calendar ICS for renewals and website/lead intake (token). Tokens revocable; do not share leaky URLs.



12.4 Licence

Navigation **Licence**; title **Mobile app licence**. Paste key with prefix CUC2.... from delivery mail and assign seats. The web app stays AGPL-free; the companion app needs seats.



12.5 Agreement catalogue

Navigation **Catalogue**; title **Agreement catalogue**. Product codes and types for agreements (including limited custom codes). Unknown code is rejected.

12.6 Personal e-mail OAuth

Navigation **Mail OAuth**; title **Personal e-mail OAuth**. Store Google/Microsoft OAuth apps so people can connect mailboxes without passwords. Only app admins change credentials.

Complete paths by role

This chapter summarises what you do with exactly one role from start to finish — without reading other chapters.

13.1 View only path

1. Sign in, open CustomerCheck (must be allowed).
2. Read **Today**, **Overview**, **Companies**, **Deals**, **Money**.
3. Read company 360° and inbox; no assignment, no import, no team.
4. **This week** read only (**Read only**).

13.2 May edit path

1. Sign in; morning routine **Today** (chase deals, commitments, assign mail).
2. Create/maintain companies; people and deals in 360°.
3. Move pipeline; claim with **I'll take it**; tick off checklists.
4. Maintain **Tasks** and **My customers** / **Plans**.
5. **Inbox**: assign and reply with send right; connect **My e-mail**.
6. Optionally **Import**; **This week**: add own commitments and review last week.
7. **Team**: own row only.

13.3 May manage team path

Everything from the member path, plus:

1. **Team**: coaching, OOO, redistribution, escalations, 1:1.
2. **Team & mailbox**: member roles, IMAP/SMTP, folders, mail policy.
3. **Checklists**, **Assignment sources**, **Commitments**.
4. Resolve **Conflicts**; GDPR **Delete (GDPR)** on companies.

13.4 App administrator path

1. Like manager in the workspace (bypass), plus:
2. **App settings**: **Access**, **Reminders**, **Feeds**, **Licence** (CUC2), **Catalogue**, **Mail OAuth**.
3. Maintain allowlist and access mode (Chapter 15).
4. Assign mobile seats; web remains usable without seats.

Errors, empty states and messages

14.1 Validation

Enter a deal title. Deal without title — set title and save.

Please correct the highlighted fields. Required or format errors in forms (company, person, agreement, ...) — check highlighted fields.

Unknown pipeline stage. Stage outside Lead...Lost — choose valid stage.

Choose a loss reason code. When **Lost**, set a code.

Enter a commitment title. Weekly commitment without text.

The slug “...” is already in use. Choose another short name.

14.2 Empty states

No companies yet Create first company or import.

No deals yet Create deal in pipeline or 360°.

No tasks yet Capture activity on the company.

No account plans yet Start plan under **Plans** or **Plan & links**.

No agreements yet / No licences yet Create agreement.

No mail yet / Nothing unassigned Connect mailbox or assignment is empty.

All done / Nothing needs attention right now. No open Today/overview entries.

No commitments this week yet. Add commitment or tap suggestion.

14.3 Concurrency and rights

Deal just claimed Reload and optionally ask manager for redistribution.

Commitment already closed Reload **This week**.

You can only review your own commitments. Leave other commitments to the owner.

View only — please ask a member to assign. Request write role.

Viewers cannot open the team board. Role **May edit** or higher.

14.4 Network and export

Export downloaded. GDPR/company export successful.

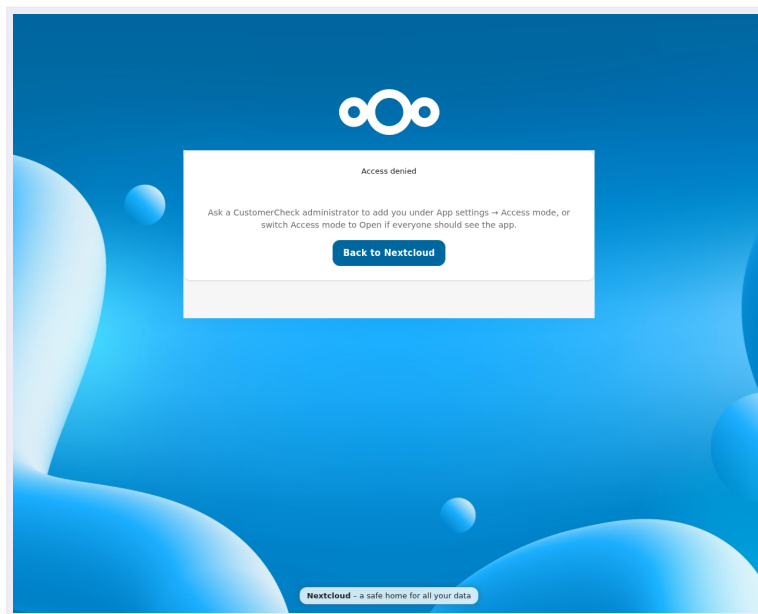
Export failed Try again; if persistent, admin.

OAuth session expired Restart connection under **My e-mail**.

Access denied

When **Access mode** is **Restricted** and your account is neither on the user/group allowlist nor app or system administrator, CustomerCheck shows the **Access denied** page.

Typical UI hint (informal you): *Your organisation restricts access to CustomerCheck. You are not on the user allowlist and are not in an allowed group.* Plus the note to ask an administrator to allow you under **App settings** → **Access mode** or set the mode to Open.



15.1 Fail-closed with empty allowlist

If restriction is active and **no** users and groups are allowed, only app administrators can use CustomerCheck. The settings page warns explicitly and asks to add colleagues.

15.2 What you can do

1. Check that you use the correct Nextcloud user.
2. Ask an app administrator to allow you under **Access** or — deliberately — set mode **Open**.
3. Workspace roles (**View only** vs. writing) are different: the app opens, individual actions are missing.

Accessibility

CustomerCheck targets **WCAG 2.1 AA** within the Check family (ArbeitszeitCheck chrome):

- Skip links and labelled main navigation (`aria-label`, `aria-current` on the active page),
- visible keyboard focus in navigation, forms and dialogs,
- status messages via live regions (`aria-live`) e.g. when loading overview/This week,
- company 360° tabs as tab panels with keyboard operation,
- contrast via theme tokens; no status signal by colour alone without text.

16.1 Keyboard and screen width

There are no app-specific global shortcuts beyond browser and Nextcloud. Forms and menus (**More**, **Tools**) are keyboard reachable.

The UI is designed for narrow viewports; tables use responsive layout. The product aims for usable display from about **320 px** width (Nextcloud shell and soft-keyboard behaviour on phones).

16.2 Notes

Automated contrast and a11y helpers exist in development. On problems check theme and browser and contact support. The optional companion app has its own a11y checklists and is not covered by this web manual.

Frequently asked questions

Why is Team missing in navigation? You have role **View only**, or navigation hides Team. Team needs at least **May edit**.

Why is Import missing? Without write access (**View only**) **Import** does not appear.

Why are App settings missing? Only app administrators and Nextcloud system admins see this item.

Can I switch between organisations? No. In version 1.6.184 multi-workspace is disabled — one book per instance without switcher.

Does CustomerCheck replace InvoiceCheck or accounting? No. Documents and payments stay in InvoiceCheck; hours in ProjectCheck. CustomerCheck shows signals and renewals.

Why is Money or uninvoiced work empty? Sister app missing, customer not linked, or honest hour data missing — then no invented € 0.

What is the difference between commitments and customer promises? **This week** commitments are internal WIP promises. **Customer promises** are expressed to the customer.

Is personal mail shown to the team? No. Personal related hits stay private. Only the configured team mailbox feeds the shared index.

Do I need a mobile licence for the web app? No. CUC2 seats concern only the companion app (**Get app**).

What to do on access denied? Ask app admin for allowlisting under **Access** — Chapter 15.

Glossary

360° view Company page with tabs **Today**, **People**, **Deals**, **Invoices & files**, **Plan & links**.

App door Access mode and allowlist under **App settings** → **Access**.

Claim Take over a deal without owner with **I'll take it**.

CUC2 Prefix of mobile licence keys for the companion app.

May edit Workspace role with write access.

May manage team Workspace manager role: team, mailbox, conflicts, GDPR delete.

This week Weekly ritual with WIP commitments and last-week review (Brief).

Fail-closed Restricted access without allowlist: app admins only.

Today Daily queues for chase, commitments, mail, renewals.

Customer promise Commitments expressed to the customer (not weekly WIP).

View only Read-only workspace role.

OOO Time-limited cover without ownership change.

Pipeline All deals as table or board with fixed stages.

Slug Immutable short name of the company.

Overview Business pulse: book health and attention list.

Assignment Assign unassigned shared mail (and opt-in sources) to a company.

Commitment Internal weekly obligation under **This week**.

Coverage catalogue

Mapping of product capabilities (CustomerCheck 1.6.184) to this manual — for QA.

Topic	Status	Chapter
App door vs. WS roles / matrix	covered	1, 13
Single org (no switcher)	covered	1, 2
Sign-in / navigation by role	covered	2
Today queues	covered	3
Overview (Pulse)	covered	3
This week confirm/verify	covered	3
Company list / create	covered	4
360° tabs	covered	4
People / buying roles	covered	4
Merge / GDPR export+erase	covered	4
Archive / restore / filter	covered	4
Pipeline table/board	covered	5
Stages Lead→Won/Lost	covered	5
Claim / loss codes / checklists	covered	5
Sequences	covered	5
Agreements 60/30/7/0/+7	covered	6
Partner hours 15 min / 80 %	covered	6
Money / InvoiceCheck	covered	6
Tasks / My customers / Plans	covered	7
Inbox Personal/Team/Unas- signed	covered	8
Assignment workflow	covered	8
Team board / OOO / bulk / esca- lation / 1:1	covered	9
Import CSV/JSON	covered	10
Conflicts	covered	10
WS settings all sections	covered	11
App settings all sections	covered	12
Access denied / fail-closed	covered	15
Validation & empty states	covered	14
Accessibility WCAG / 320 px	covered	16
FAQ / glossary	covered	17, 18
Mobile companion UI	open	note only; separate manual
Multi-workspace	n/a	MULTI_WORKSPACE_EN- ABLED=false

About Software by Design

Software by Design builds Nextcloud apps for organisations that want to host their own data — from time tracking and projects to inventory, fleet management and customer relations. Every app runs entirely on your Nextcloud instance; the web interfaces are free (AGPL).

Company

- **Website:** <https://nextcloud.software-by-design.de/>
- **Partner & quotes:** <mailto:info@software-by-design.de>
- **Report a bug / suggest an improvement:** <mailto:dev@software-by-design.de>

Support & how to contribute

CustomerCheck remains free on your Nextcloud (AGPL). Bug reports and sensible ideas via GitHub or email are part of open-source maintenance — without a guaranteed response time.

In the app

Under **Settings** → **Help & support** (navigation chip may still read **Support us**) you find the same options as on our website: partner quote, onboarding, commissioned feature and voluntary support.

Check Partner (invoiceable)

If your organisation needs predictable help with an invoice — setup, hour packages, prioritised email — choose **Check Partner**. That is a professional service with quote and invoice, not a donation.

- Packages and terms on the support page: <https://nextcloud.software-by-design.de/en/support/>
- Request a partner quote: <mailto:info@software-by-design.de?subject=Partner%20inquiry>

Other invoiceable options

- **Onboarding & training** — remote setup or workshop for your team.
- **Commissioned feature** — scoped change with acceptance criteria and delivery date.
- **Official mobile & terminal licences** — where offered for CustomerCheck; named seats with invoice.

GitHub Sponsors (voluntary)

Voluntary support without an invoice SLA — appreciated, but optional:

<https://github.com/sponsors/aSoftwareByDesignRepository>

Legal note

This manual does not replace legal, tax or compliance advice. Third-party product names and trademarks belong to their respective owners.

Index

- 360°, 9
- Access denied, 33
- Access mode, 28
- Access restriction, 1
- Accessibility, 34
- Account owner, 17
- Account plan, 18
- Agreement catalogue, 30
- App administrator, 1
- App settings, 28
- Archive, 11
- Archived companies, 11
- Assignment sources, 27
- Business Pulse, 8
- Catalogue, 37
- Checklist, 14
- Checklist templates, 26
- Circles, 27
- Claim deal, 14
- Coaching, 21
- Commitments, 27
- Companies, 9
- Company 360, 10
- Conflicts, 23
- CUC2, 30
- Deals, 13
- Edit conflict, 23
- Errors, 32
- Escalation, 22
- FAQ, 35
- Feeds, 29
- GDPR, 11
- Glossary, 36
- ICS, 29
- Import, 23
- Inbox, 19
- Integrations, 27
- InvoiceCheck, 15
- Licences, 15
- Loss reason, 14
- May edit, 1, 31
- May manage team, 1, 31
- Merge, 11
- Mobile licence, 30
- Money, 15
- My customers, 17
- My e-mail, 19, 25
- OOO, 21
- Overview, 7
- People, 11
- Personal e-mail, 19
- Personal e-mail OAuth, 30
- Pipeline, 13
- Pipeline view, 26
- Plans, 17
- Pulse, 8
- Queue, 7
- Reassign, 21
- Reminders, 29
- Renewals, 15
- Restore, 11
- Roles, 1
 - paths, 31
- Sequence, 14
- Sign-in, 3
- Tasks, 17
- Team, 21
- Team & mailbox, 25
- Team mailbox, 25
- This week, 7

Today, 7

View only, 1, 31

Webhook, 29

Weekly commitment, 8

WIP, 8

Workspace, 2

Workspace settings, 25