Ninja Prospecting CRM Demo Runsheet — Changes Since August 12, 2026

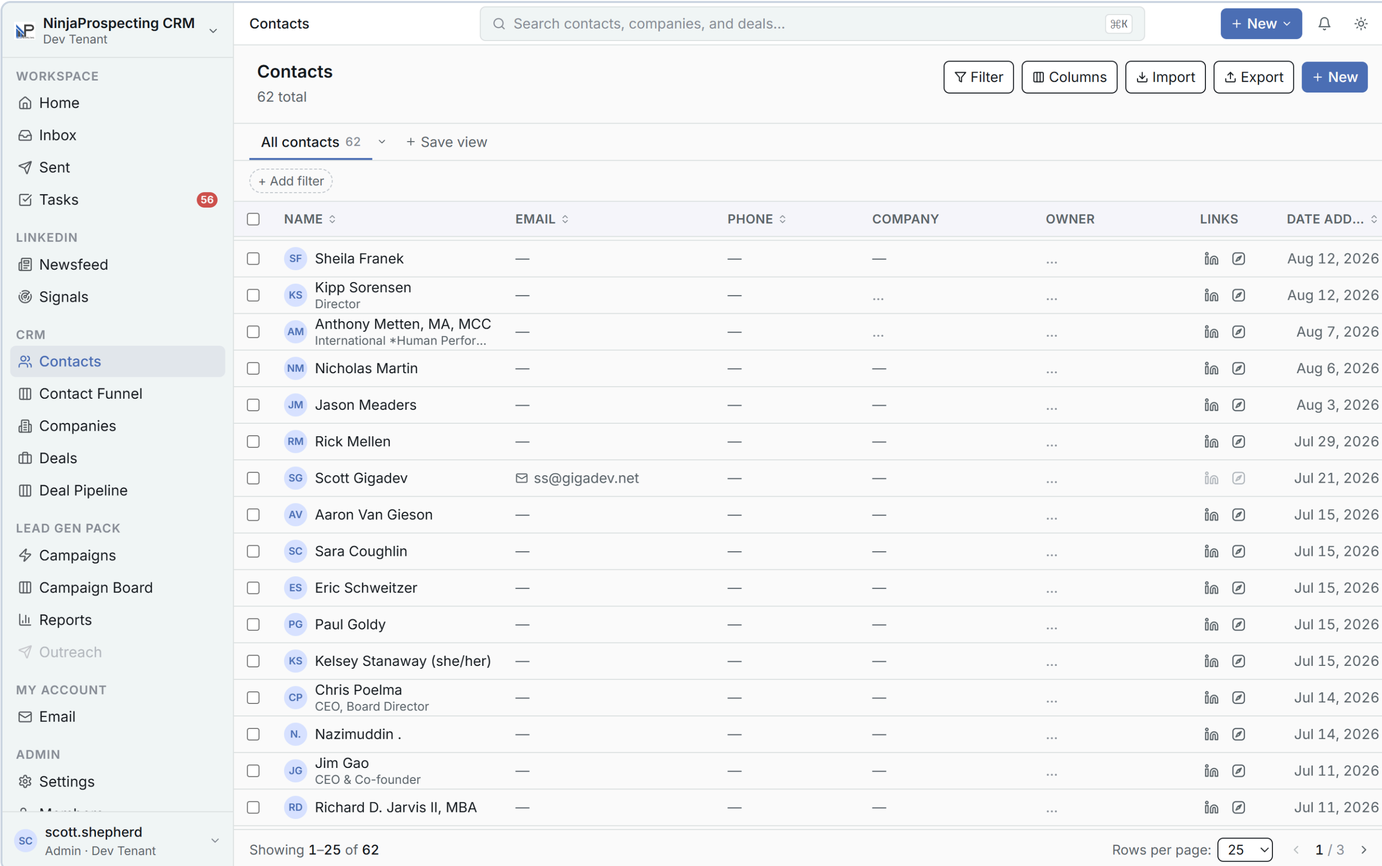
Twelve stops. This wave is mostly about the two things reps do all day — reading a record and sending a message — plus an extension wave that makes a profile visit worth something, and a settings pass that lets an admin shape the workspace without asking us for a code change.

> ***What this covers***
>
> *Everything since the August 12 demo. Four threads run through it: **email grew up** (attachments, and Outlook is now a first-class citizen alongside Gmail), **the contact record got readable** (one dialog with every field, long text that actually wraps, pickers that save when you pick), **a profile visit now fills the record in** — and tells you when LinkedIn disagrees with what you have — and **admins got the keys** to field names and option colors.*
>
> ***Prep:** the web app deployed with this wave; signed in as an **admin**. Extension **1.2.0-beta.4** is required for STOPS 5 and 6 — the profile enrichment and the badge/options changes are extension-side.*
>
> ***Path:** a list → a contact → the email composer → Conversations → a LinkedIn profile → Newsfeed → Settings. Then the fixes you can't see.*

STOP 1 — Any list *(the header stays put)*

Open **Contacts** and scroll. The column headers stay pinned at the top of the list while the rows move under them — so on row 60 you still know which column is which. Same on **Companies**, **Deals**, **Campaigns**, **Tasks**, and the To-do / History cards on a contact.

Scroll sideways too: the header and the data move together, so a header never drifts away from the column it names.



Scrolled 300px into the list — the toolbar, the view tabs, and the column header are all still on screen.

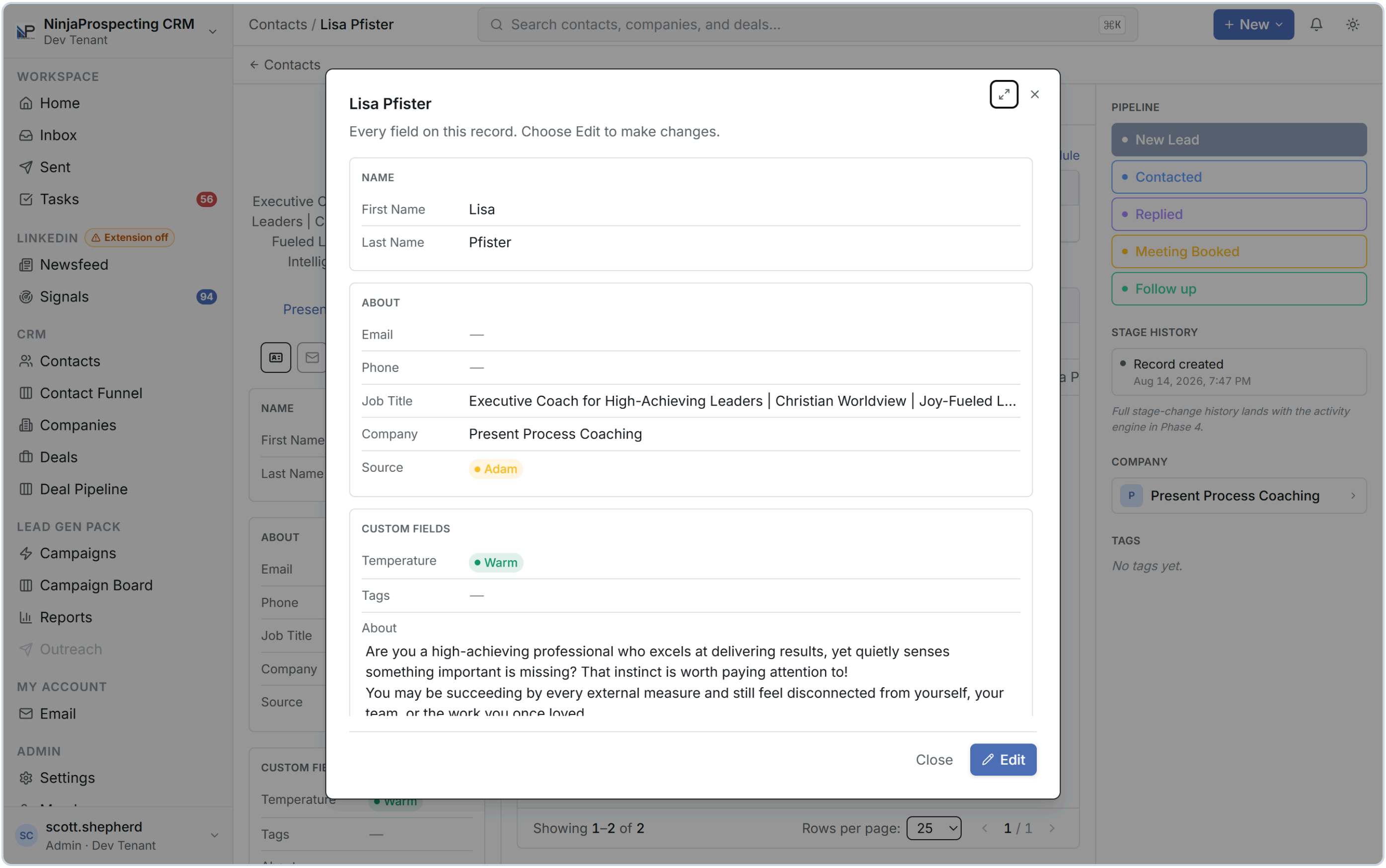
STOP 2 — Contact detail *(the whole record, in one place)*

Click a contact's **name**, their **photo**, or the new **ID-card button** (first icon in the action row) — all three open the same dialog: **every field on the record**, grouped, at full width.

It opens **read-only** on purpose. You're usually there to read, not to edit — so nothing can be changed by a stray click. Press **Edit** when you actually want to change something, and the whole set becomes a form with one **Save**. The ⤢ button in the corner expands the dialog to near-full-screen for long records — the same control the Activity dialog has.

Three smaller things in the same area:

- **Long text is finally readable.** About and Mailing Address wrap and scroll in a block of their own instead of being cut off at one line.
- **Pickers save when you pick.** Company — the last hold-out — now saves on selection like every other dropdown. No more "did that save?"
- **The panel and the dialog can't drift.** They read from one definition, so a field added in Settings shows up in both.



Name, About, and Custom Fields at full width — including the long About paragraph, wrapped and scrollable. Close and Edit are pinned at the bottom.

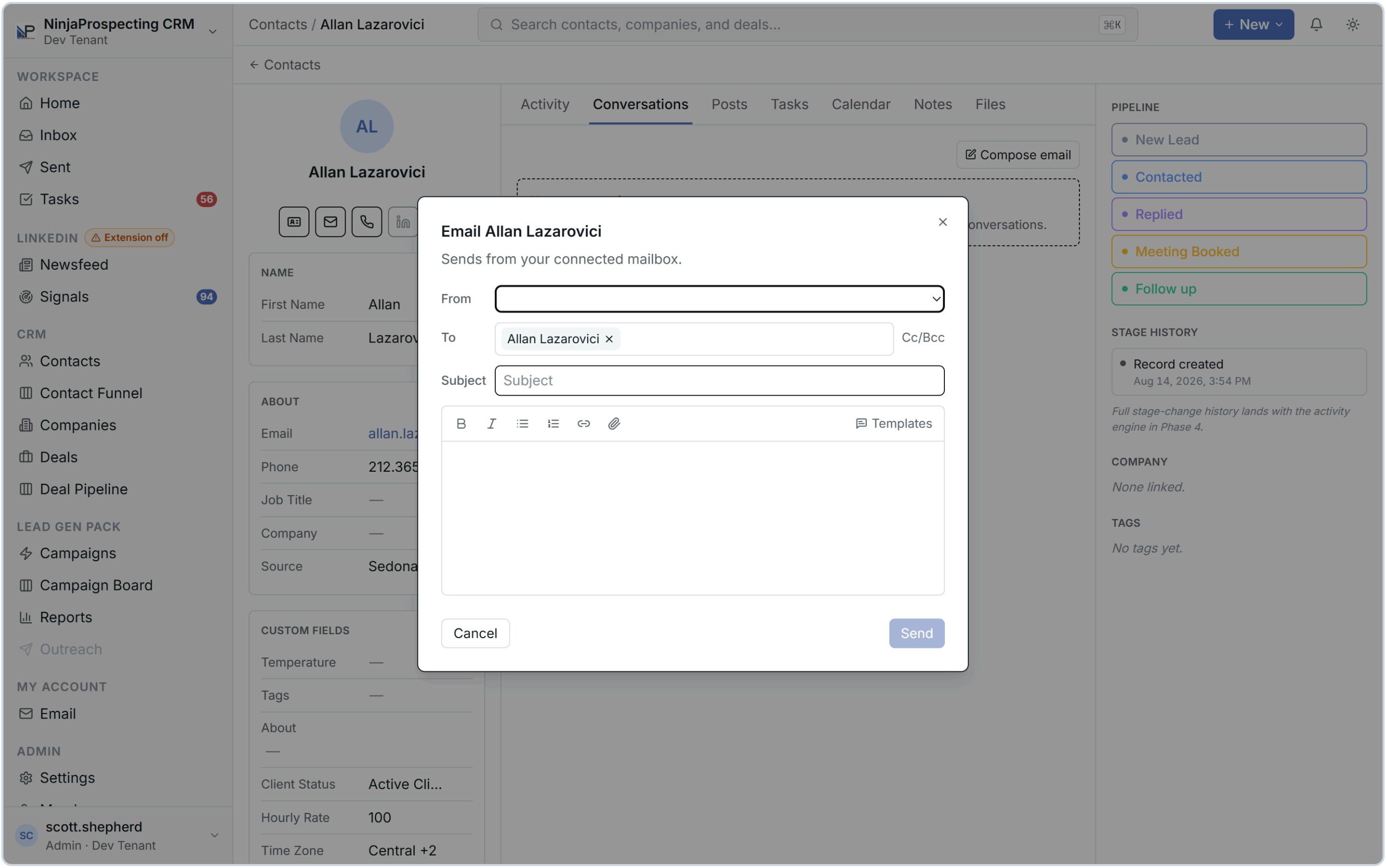
STOP 3 — Email *(attachments, and Outlook parity)*

Open **Compose email** from a contact (or reply to a thread). The toolbar now has a **paperclip**: pick a file and it uploads while you keep typing, shows as a chip you can remove, and rides the send. Recipients get a normal attachment; the CRM records what was sent, and the file downloads from the timeline later.

Two rules worth stating out loud, because they're deliberate:

- **Nothing is ever silently dropped.** If a path can't carry a file, it refuses up front rather than sending your email without it. That's why scheduling a send and attaching a file are mutually exclusive today — "Send later" turns off when a file is attached, and vice versa.
- **The caps are ours to set, not yours to discover.** Defaults are one file up to 1 MB; we can raise that per-deployment without a release.

Outlook is now level with Gmail. A Microsoft mailbox sends, replies, attaches files, and its calendar creates, moves, and deletes events — all verified against a live Microsoft account, not just tests.



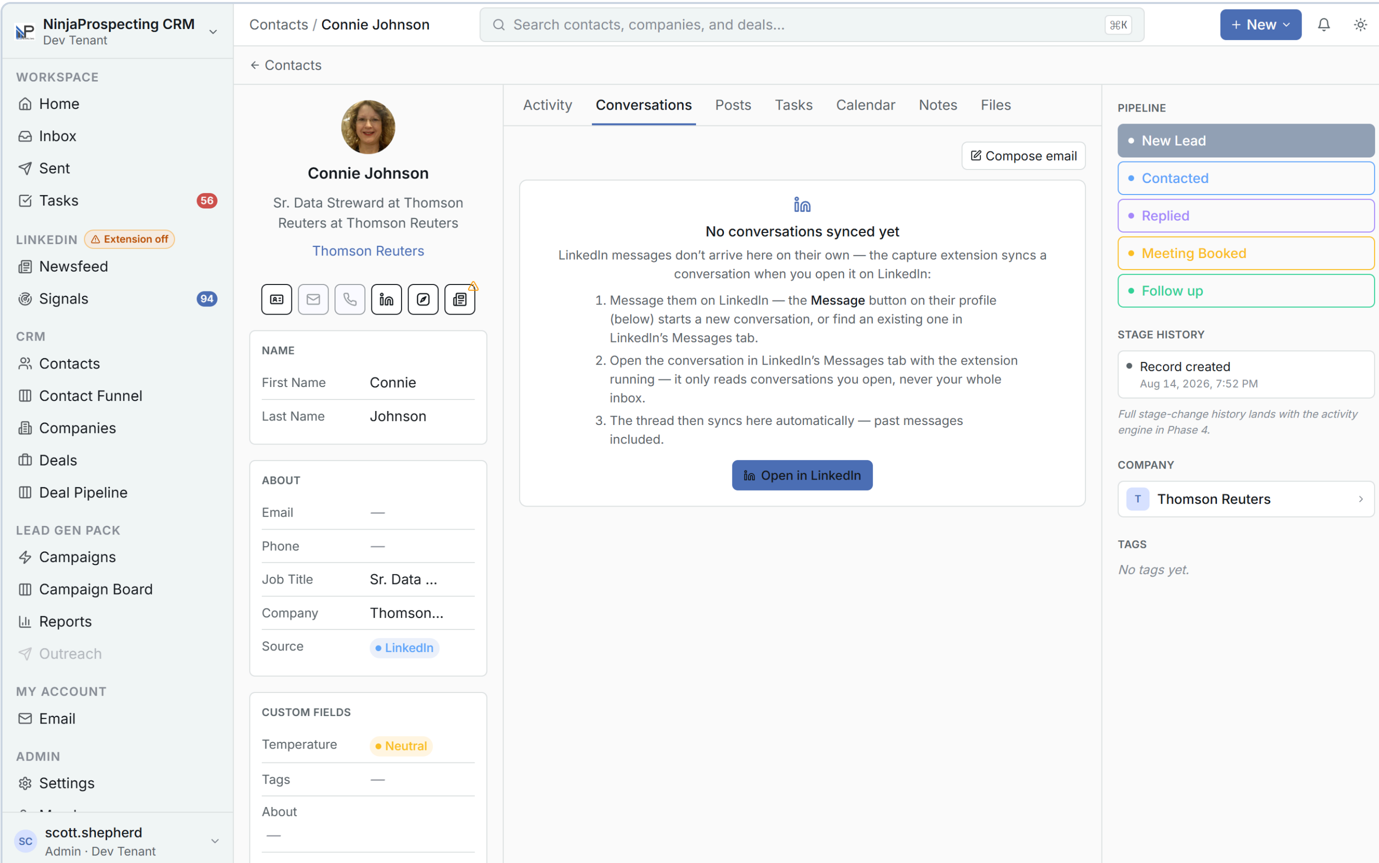
Compose from a contact: From / To / Cc-Bcc / Subject, formatting, Templates — and the paperclip for attachments.

STOP 4 — Conversations tab *(the empty state that teaches)*

Open a LinkedIn-connected contact with nothing synced yet. The card used to say one line about the extension; reps read it as "*it'll show up eventually.*" It won't — and now the screen says so, in three steps:

1. Message them on LinkedIn (the **Message** button on their profile, or find the conversation in LinkedIn's Messages tab).
2. **Open that conversation** with the extension running — this is the step everyone was missing. The extension only reads conversations you open; it never crawls your inbox.
3. The thread then syncs here on its own, past messages included.

A Sales-Navigator-sourced contact gets the same three steps worded for *its* surface — "lead page" and "Sales Navigator Inbox" instead of profile and Messages tab.

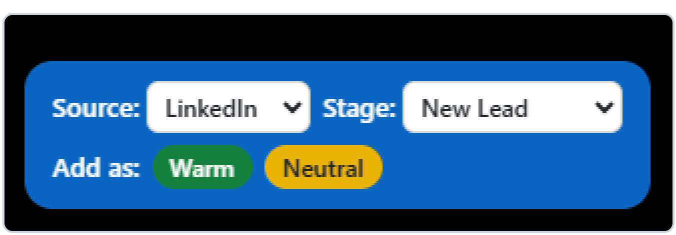


The steps name the surface, the open-the-thread requirement, and the promise that history back-fills.

STOP 5 — A LinkedIn profile *(what the page now teaches the CRM)*

Open someone's `/in/` profile with the extension running. Two things happen — one you ask for, one you don't.

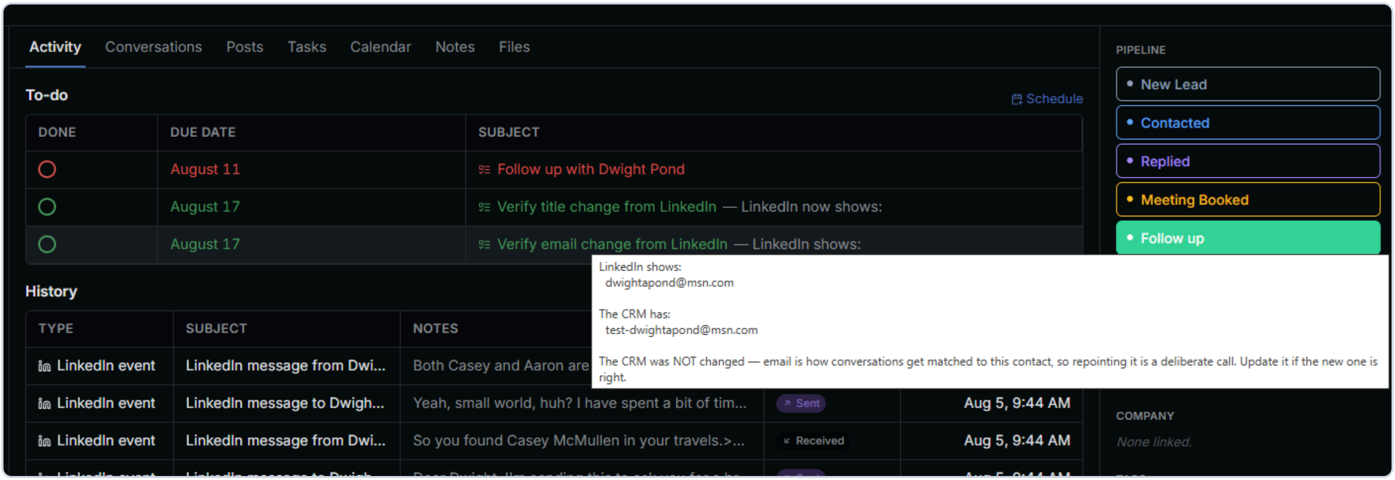
The Add-to-CRM pill is the two-row picker: **Source** and **Stage** on top (both fed by your workspace on every profile view — rename a stage in the CRM and the pill knows next time, no extension update), and the temperature chips below. Picking a temperature *is* the add.



Row 1 configures, row 2 commits. Source and Stage come from the workspace; the chips are the click that creates the contact.

And the profile now fills the record in. Viewing a `/in/` page reads the person's **About**, **job title**, and **company** and writes them into any of those fields the CRM has left blank — then links or creates the company record so the contact isn't floating. That used to be Sales-Navigator-only.

The important half is what happens when the CRM **already has a value and the page disagrees**: nothing is overwritten. You get a task instead — **"Verify title change from LinkedIn"**, **"Verify email change from LinkedIn"** — carrying both values so you can decide without going back to LinkedIn.



Both values in the task body, and the reason stated: email is how conversations get matched to a contact, so repointing it stays a human decision.

Worth demoing live — the enrichment only reads what a profile actually renders, so the honest version of this stop is a real profile, not a fixture. Note the fill is blanks-only: a value a rep typed is never touched.

STOP 6 — The extension's own options *(badges that stack, confirmations you can mute)*

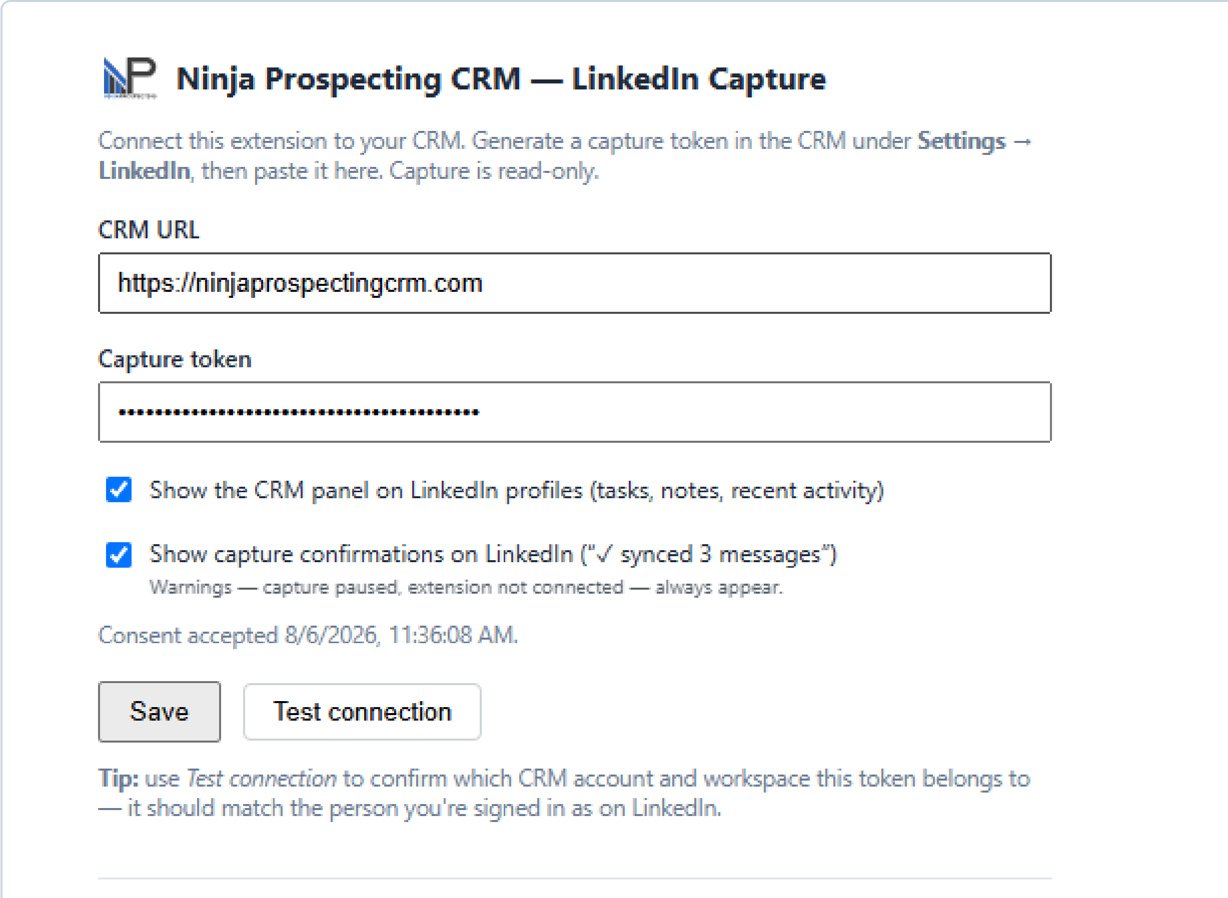
Two quality-of-life changes reps will notice immediately:

The bottom-left corner stopped colliding. The capture status badge used to sit at a fixed height that assumed a one-row Add-to-CRM pill — so when the pill grew to two rows, the badge overlapped it. Both now live in one stack: the pill at the bottom, badges stacking above it.

The options page now has two checkboxes, both **default ON** — open the extension's options from Chrome's extensions menu:

- **Show the CRM panel on LinkedIn profiles** (tasks, notes, recent activity) — the existing overlay, now labelled for what it actually shows.
- **Show capture confirmations on LinkedIn** — new. Turn it off and the routine "✓ synced 3 messages" toasts stop appearing.

These are **per-rep preferences**, stored in the extension itself, not workspace settings — one rep muting confirmations doesn't change anything for anyone else.



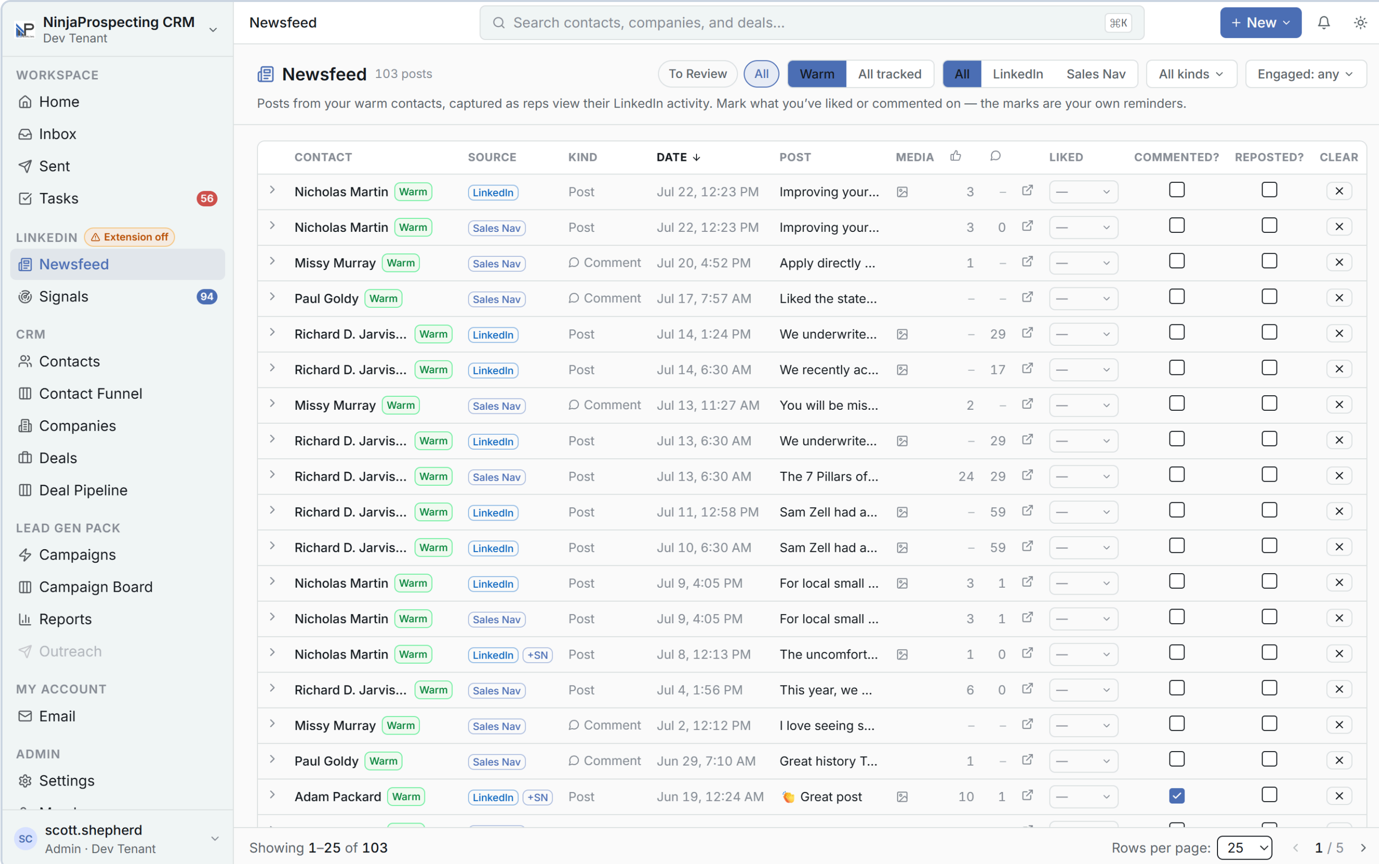
CRM URL and capture token at the top, the two display preferences below — with the line that matters printed right under them.

One line that is deliberately not configurable — and it's on the options page itself: "*Warnings — capture paused, extension not connected — always appear.*" Opting out of good news is not opting out of being told capture is broken.

STOP 7 — Newsfeed and the contact Posts tab *("Reposted?")*

Engagement marks now have a third flag: **Reposted?**, beside Liked and Commented — one checkbox, same as the others, on both the Newsfeed and a contact's Posts tab. Filter on it ("Reposted by me"), and a repost counts as "I did something" for the **To Review** queue.

The marks are still **your own reminders** — the CRM never guesses what you did on LinkedIn, and clearing every mark on a post removes the record rather than leaving an empty one behind.



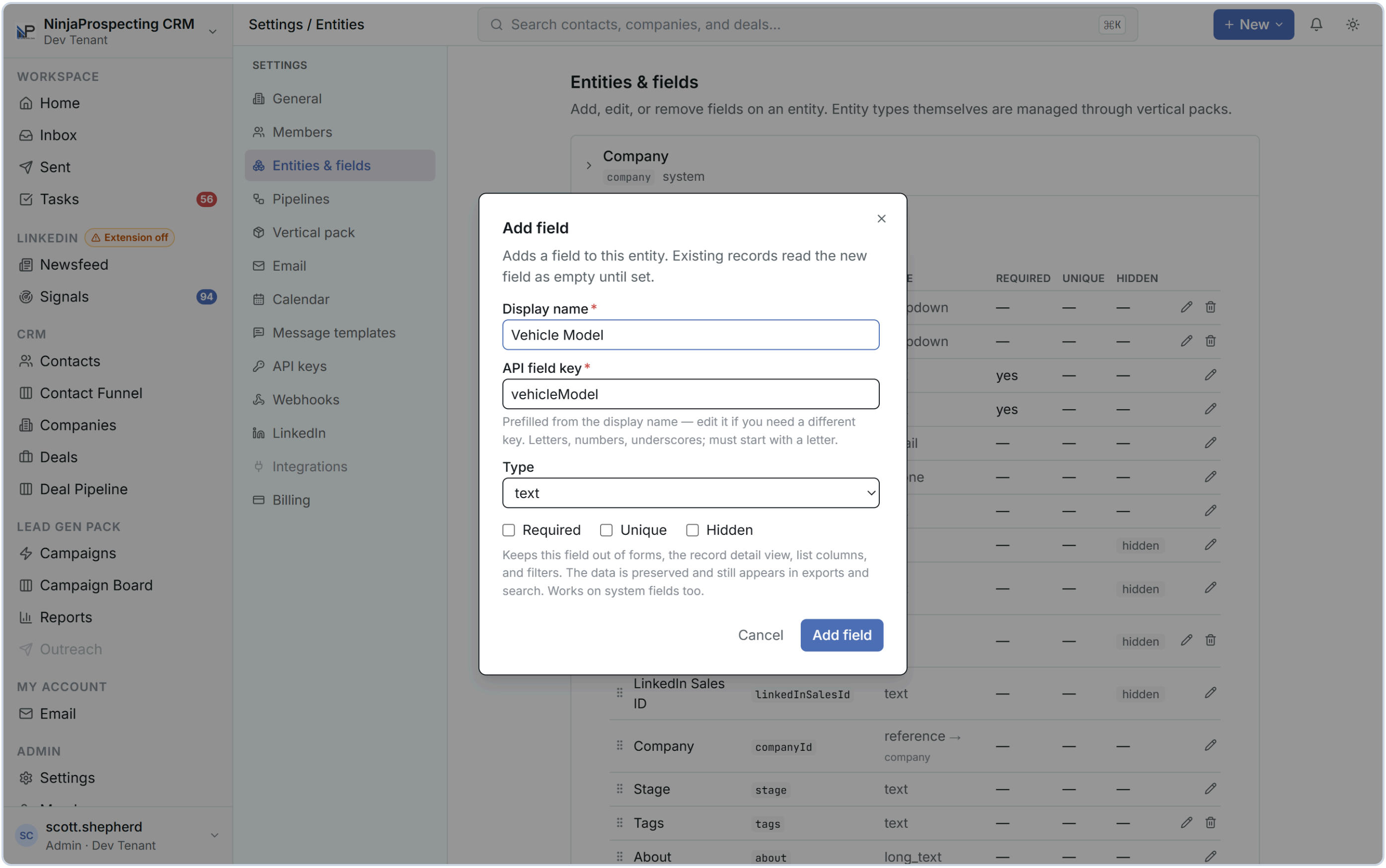
All 103 captured posts. To Review is the default view and reaches zero by engaging, clearing, or aging out — this is the All view.

STOP 8 — Settings → Entities & fields *(name a field once)*

Two labels used to disagree — the table said "API key", the dialog said "Field key". Both now read **API field key**, which is what it actually is: the property name an integration reads in the API, and the key the data is stored under. (It has nothing to do with Settings → API Keys, which is credentials.)

Better: **it fills itself in.** Type a Display name and the key appears underneath in the house style — `Vehicle Model` → `vehicleModel`. Edit the key yourself and it stops following; clear it and it starts again. Messy names come out valid anyway: `5 Fr1nedly F!ends` → `fr1nedlyFends`.

If the key is already taken, you're told before you press Add — including the case that used to be baffling: **a deleted field keeps its key**, so the hint names the deleted field rather than leaving you to guess.

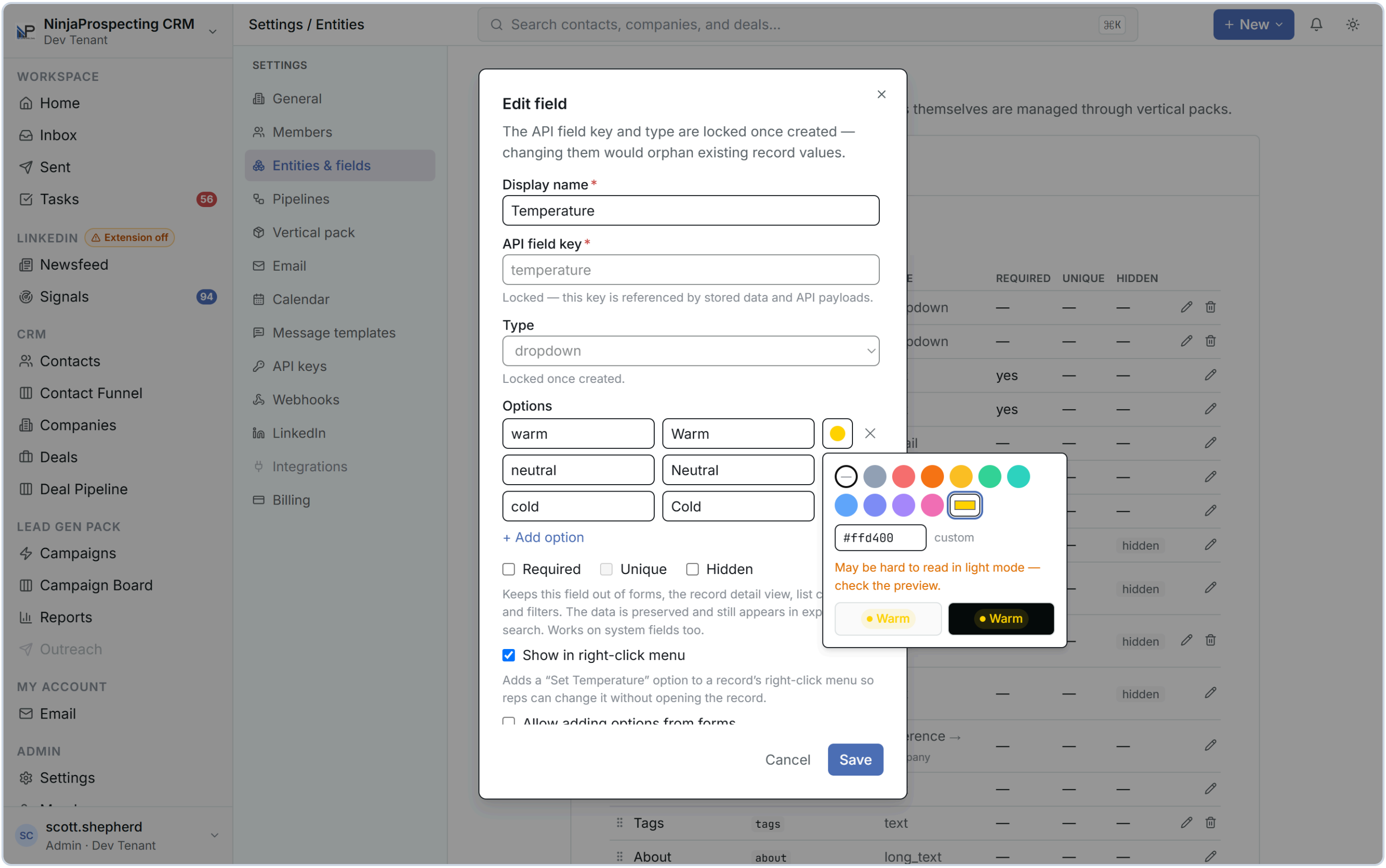


"Vehicle Model" typed above; "vehicleModel" prefilled below, with the rules spelled out under the box.

STOP 9 — Option colors *(any color you like)*

Dropdown options were limited to ten swatches. Now there's a **Custom** slot: a real color picker plus a hex box, so a workspace can match its own palette.

The interesting part is the guard rail. Because a chip is drawn *in* its own color, a too-pale pick disappears on a white background and a too-dark one disappears on a black one. So the picker shows a **live preview on both light and dark**, side by side, and warns when a color falls below the readable threshold — naming which mode it fails in. It's a **warning, not a block**: pick the brand yellow if you want it, with your eyes open.



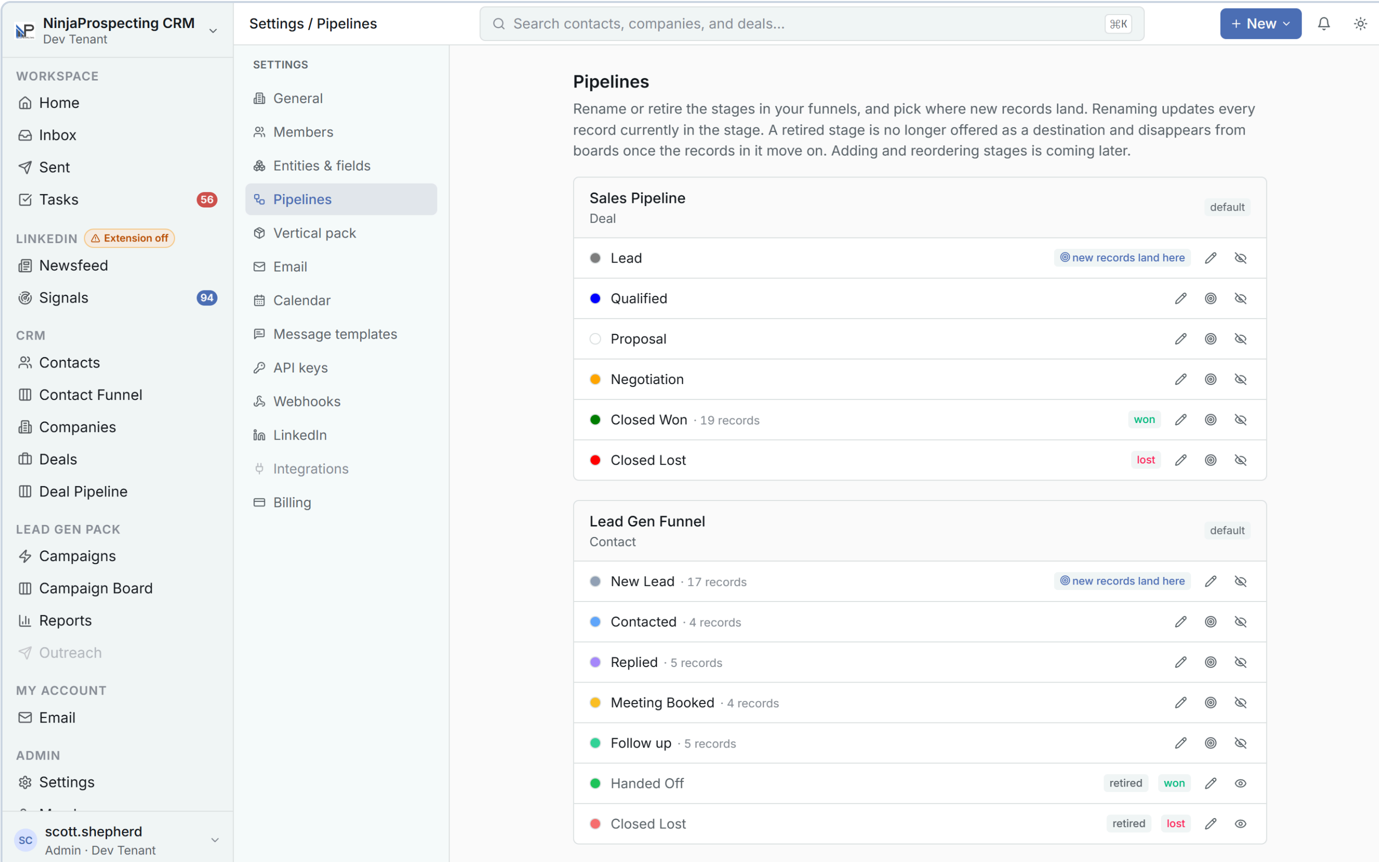
A custom #ffd400: the warning names light mode, and the two preview chips show exactly why.

STOP 10 — Settings → Pipelines *(rename, retire, and where records land)*

Unchanged from last time but worth re-showing, because two of this wave's setup changes live here:

- **New workspaces** now ship with **Closed Won** visible as the funnel's final destination (it used to be called "Handed Off" and arrive retired).
- **Existing workspaces keep what they have** — nothing was migrated under anyone. This is the screen where you rename a stage and un-retire it; the rename updates every record sitting in that stage.

The **"new records land here"** marker still decides where the extension, the Signals page, and **+ New** drop a new contact.



Both funnels, their retired stages, and the landing-stage marker. This workspace still has the older "Handed Off" — one rename away from the new default.

STOP 11 — Onboarding *(one less question)*

New-workspace setup no longer asks which vertical pack to install — for a Ninja Prospecting deployment there's one right answer, so the step is hidden and the pack installs itself. The stage preview in setup also shows only the stages a new workspace will actually see.

The wiring is intact behind a flag: when we sell to a second vertical, the step comes back without a rebuild.

STOP 12 — What you won't see *(and why that's the point)*

Column order stops forgetting itself. Drag columns into the order you like, come back tomorrow, and it's still that way. Columns that load a moment after the page (Stage, Source, Temperature) were quietly being dropped from the saved layout on every cold load.

LinkedIn tells you when an email changed. Viewing a Sales Navigator lead whose page shows a different email than the CRM holds now raises a **"Verify email change"** task instead of doing nothing. The CRM is never overwritten — email is how conversations get matched to a contact, so changing it stays a human decision — but you find out.

Bad links fail politely. A malformed record id in a URL now returns a clean "that's not a valid id" instead of a server error page (and stops filling our error monitoring with noise that looks like an outage).

The capture extension diagnoses itself better. Its structural diagnostics got sharper *and* a leak was closed — profile slugs could ride along inside element keys; they're scrubbed now. Diagnostics still carry shapes and counts only, never names, text, or photos.

Profile reading survived LinkedIn's rewrite. The pages STOP 5 depends on are now server-rendered components with no headline JSON, no `<h1>`, and no `<section>` wrappers — the first cut of the reader captured *nothing* on a real profile. It was rebuilt to anchor on the per-card identity key instead, which is sturdier than what it replaced: it's tied to the person being viewed rather than to where things sit on the page. Same rule as always — if the page is ambiguous, capture nothing rather than guess.

Photos come back on more profiles. Some profile layouts wrap the real portrait in a link with no profile slug, which the avatar reader used to reject outright — those contacts kept their initials forever. It now confirms which image belongs to the person from the small copies, then takes the pixels from the large one.

Anthony's Notion import shipped its full-migration mode — chunked commits, per-household savepoints, and a customer-readable skip report. That import has its own walkthrough: `CRM_Walkthrough-Notion_Import_for_Anthony.pdf`.

Versions: web app through the August 15 fine-tune wave; capture extension **1.2.0-beta.4**, **live in the Chrome Web Store** as of this runsheet (the August 12 demo ran beta.3). Store installs update themselves — a rep on beta.3 will pick STOPS 5 and 6 up on Chrome's next extension refresh, or immediately via *Update* on `chrome://extensions`. Every other stop is web-only and live the moment the app deploys. Existing workspaces keep their current funnel stage names until an admin renames them in Settings → Pipelines.