Demo Video Walkthrough — Handoff

Purpose: a run document for recording one demo video per sidebar menu option in Ninja Prospecting CRM. Each section below is a self-contained shooting script: what state to stage before you hit record, the step-by-step walkthrough of every feature on that surface, and the details worth calling out on camera. Work through the sections in order or independently — each stands alone.

Scope: the fourteen menu entries an Admin sees today:

#	Section	Menu entry	Route
1	Workspace	Home	`/`
2	Workspace	Inbox	`/inbox`
3	Workspace	Sent	`/sent`
4	Workspace	Tasks	`/tasks`
5	LinkedIn	Newsfeed	`/newsfeed`
6	LinkedIn	Signals	`/signals`
7	CRM	Contacts	`/contacts`
8	CRM	Contact Funnel	`/contacts/board`
9	CRM	Companies	`/companies`
10	Lead Gen Pack	Reports	`/reports`
11	My account	Email	`/settings/email`
12	Admin	Settings	`/settings` (hub with its own left sub-nav)
13	Admin	Members	`/settings/members`
14	Admin	API Keys	`/settings/api-keys`

Entries that can appear in other workspaces but are not in this sidebar today (Deals, Deal Pipeline, Campaigns, Campaign Board, the SuperAdmin section) are listed in the Appendix — decide separately whether they get videos.

Sources of truth if a step doesn't match the app: `docs/QA_USER_GUIDE.md` (feature behavior, section numbers referenced below as §), `apps/web/src/components/shell/sidebar-nav.tsx` (menu structure), `apps/web/src/components/settings/settings-subnav.tsx` (Settings sub-pages).

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0. One-time recording setup

Stage this once before the first video; every section assumes it.

Account and roles

- Record signed in as an **Admin** (the full feature set). Where a video mentions Member/Read-Only differences, that's a talking point, not a role switch mid-video.
- Have a second browser profile signed in as a **Member** if you want to show role differences live (optional).

Workspace state — make the data look lived-in

> ***Seed script:*** `apps/web/scripts/seed-video-demo.ts` *stages everything in this list except the LinkedIn capture surfaces (Newsfeed posts, Signals, avatars — those are captured live with the extension). Run from* `apps/web` *:* `pnpm tsx scripts/seed-video-demo.ts --tenant-name "Ninja Tester Tenant 1" --owner <your-login-email>` *. It targets exactly that one tenant, is idempotent per section, and never touches other tenants' data — see the script header for the local* `--create` *variant and the production env setup.*

- 30+ contacts with real-looking names, several with captured LinkedIn photos, spread across funnel stages. A handful with Warm/Neutral/Cold temperatures and varied Sources.
- Several companies, each with related contacts.
- 10–15 open activities owned by **your recording user** (mix of tasks, calls, meetings; a couple overdue so the red sidebar badge shows; a couple due today). Activities owned by someone else won't show on /tasks or the calendar.
- A few email threads (inbound + your replies) and at least one captured LinkedIn/Sales Nav message thread, so Inbox and Conversations have content.
- One compose sent to a non-contact address, so /sent has an amber "Not linked to a contact" row.
- Newsfeed: captured posts from tracked contacts (browse a few contacts' LinkedIn activity pages with the extension on beforehand). Some marked/cleared, most not — the To Review queue should have work in it.
- Signals: open your own LinkedIn notifications page with the extension on shortly before recording, so freshness reads "Checked … ago" and the queue has rows.

Feature flags (Settings → LinkedIn) — Capture, Engagement, and Signals ON (otherwise the LinkedIn nav section is empty); Reply templates / Follow-up reminders on if you want to show those composer affordances.

Connections — a send-capable Gmail or Microsoft 365 mailbox connected (composer, reply, attachments all depend on it); Google Calendar or Outlook connected two-way if you'll show calendar sync talking points; the capture extension installed, token pasted, and answering (no "Extension off" pill in the sidebar).

Cosmetics

- Pick a theme (Light or Dark) and stick with it across all videos; Density: Balanced.
- Close the browser dev tools; hide bookmarks bar; use a clean window at a consistent size.
- The QA checklist entry in the user menu is beta-only — fine to leave visible or mention nothing.

Suggested extra video (optional "Video 0"): the app shell itself belongs to no single menu entry — topbar global search / command palette (Cmd/Ctrl+K), the bare quick-create keys (`1` contact, `2` company, `3` deal, `c` call, `m` meeting, `t` task, `e` email), the **New** dropdown, theme/density preferences, breadcrumbs, and the user menu (User Guide, Demo Videos, Add Feedback, About, Sign out). If you don't make it a standalone video, fold a 30-second version into the Home video.

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1. Home (`/`)

The "what needs me today" landing screen.

Prep: signed in with the staged data above. Ideally at least one Signal and one Newsfeed post pending so the To-review card shows live counts.

Walkthrough:

1. Sign-in lands here — point out the greeting and that every card below is permission-aware: a user who can't read an entity (or whose feature flag is off) simply doesn't get that card.
2. **Count tiles** — Contacts / Companies (Deals tile appears only when Deals is enabled). Click one through to its list, come back.

3. **New Replies This Week** — recent replies newest-first, each with the contact's captured LinkedIn photo (initials are the intended fallback, not an error). Click **View all** — it deep-links to /contacts with the same filter applied.
4. **My tasks** — your open work, mirroring /tasks. Click through to one.
5. **To review** — the two zeroable LinkedIn queues (Signals to review, Posts to review) with live counts. Call out the honesty rule: a queue that has *never* been checked shows an em-dash and **"Not checked yet"**, deliberately not a `0` — "nothing to review" and "we haven't looked since Tuesday" are different situations. Once checked it reads "Checked 2d ago", and the Posts tile names its review window ("Last 14 days").
6. **Contact Funnel tiles** — stage counts; click a stage or **Open board** to land on the board.
7. **Right-click works across Home** — right-click a New Replies row (contact menu: Open / Open in new tab / Copy link / Copy email·phone / Email / LinkedIn / Add task / Add note) and right-click a count tile or View-all link (Open / Open in new tab / Copy link). Nothing on Home falls through to the browser menu.

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2. Inbox (`/inbox`)

The tenant-wide unified inbox — every email and LinkedIn/Sales Nav conversation in one threaded view.

Prep: email threads with at least one that "needs reply" (last message inbound), plus a captured LinkedIn thread and a Sales Nav thread if available. Assign one thread to a teammate beforehand so the Assignee filter has something to find.

Walkthrough:

1. Frame it: this is the same threaded view as a contact's Conversations tab, but cross-contact for the whole workspace.
2. **Thread cards** — channel icon/badge (Email / LinkedIn / Sales Nav), title, last-message preview, message count, timestamp, direction arrow, and an **Assign** dropdown right on the card.
3. Expand a thread — direction-styled bubbles; bodies linkify URLs.
4. **Inter-message notes** — the amber sticky notes between messages (Cmd/Ctrl+Enter submits). Internal context that never emails anyone.
5. **Filters** — searchable **From** (contacts you've corresponded with), **Assignee**, **Channel**, and the **Needs reply** toggle. Show that filters live in the URL (`?needsReply=true`) — refresh and the view survives.
6. **Reply** on an email thread — opens the reply composer; the reply goes out through your own connected mailbox with a single "Re:" prefix and lands back in the thread. Show the **Templates** picker; **Send later** (clock) and **Remind me** if those flags are on.
7. **LinkedIn reply** (if Reply is enabled): the draft drops into your open LinkedIn/Sales Nav compose box via the extension — "review & click Send there", never auto-sent, and it refuses to inject into the wrong thread. If Reply is off, show the honest "replies are off — an admin can enable them" notice instead.
8. **Pagination** — bottom footer, "Showing X–Y of Z", page size selector.

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3. Sent (`/sent`)

Every outbound email the CRM sent — including composes to people who aren't contacts yet.

Prep: several sent emails including at least one to a stranger (the amber badge row) and one carrying an attachment.

Walkthrough:

1. Frame it: a flat, newest-first list of **all** outbound mail — replies and composes, matched and unmatched. This is the only place a compose-to-a-stranger is visible.
2. Walk a normal row: recipient, subject, timestamp, the linked contact.

3. **The unmatched row** — amber **"Not linked to a contact"** badge. Click **Add as contact**: a New-contact modal opens prefilled with a name derived from the address (editable), runs the duplicate check, creates the contact and attaches the email — the badge clears. This is the "I emailed someone before adding them" recovery path.
4. **Attachment chips** on rows that carried files — click one; it downloads (never previews).
5. **Filters** — searchable **To** and **Sent by (owner)**; shared pagination footer.
6. **Right-click menu** — Open contact / Add as contact / New email / Copy email / Copy link.

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4. Tasks (`/tasks`)

The daily work queue — list and calendar in one place. Likely your longest video; consider splitting List and Calendar into two.

Prep: tasks/calls/meetings owned by you across due-windows: a couple overdue, some today, tomorrow, this week, plus an undated task. Attach contacts to most (the row quick-actions need a contact). Note the red sidebar badge = the Overdue tab count.

Walkthrough — List view:

1. **Time-period tabs** — To-do / Overdue / Today / Tomorrow / This week / Next week. Each is a due-window; To-do is the only tab showing undated tasks; This week is cumulative today→week-end. The tab round-trips in the URL.
2. **Due-state coloring** — red overdue, green due-today rows.
3. **Columns** — Done ○ · Contact · Due date · Subject · Email · Phone · Type · Temperature · Source · Stage (contact fields come from the first attached contact). Resize/reorder/show-hide persists per device.
4. **Done** ○ opens the three-outcome complete modal (not an inline tick): **Done + Schedule next** (completes and re-opens Schedule prefilled), **Snooze** (Tomorrow / 3 Days / 1 Week / 1 Month / 2 Months / 3 Months, with a "will resurface on..." preview), **Done + No follow-up**. Do one of each if time allows.
5. **The contact on a row is a working surface:** click the **Temperature / Source / Stage** badges — the same click-to-edit popovers as the contacts list (retired stages never offered). The ✉ icon opens the in-app composer to the contact; ☎ is tel:; LinkedIn / Sales Nav icons deep-link when captured.
6. **Right-click the contact chip** — full contact menu (Open, Copy, Email, LinkedIn, Set-field submenus, Move to stage, Add task/note). Right-click elsewhere on the row — the activity's own menu (Edit, Delete for admins). Two menus, no fighting.
7. **Source chip-filter** — narrows by contact origin.
8. **Schedule Activity modal** (via + Schedule or the topbar New → activity): type chips (Call / Meeting / Task), auto-filled subject naming the contact, quick due-date chips (Tomorrow → 3 Months), attach-to-record chips. Call out: **tasks are due-by-date** — the Time control hides for tasks, and the calendar sidebar (which shows that day's calls/meetings + real Google/Outlook events with amber conflict flags) appears only for Call/Meeting drafts.

Walkthrough — Calendar view (List ↔ Calendar toggle, top right):

9. **Month grid** — up to 4 time-colored chips per day then "+N more" (true server count; popover loads the day's full list). Day numbers click through to Day view.
10. **Week/Day** — the all-day rail, and beneath it the **tasks rail**: tasks never sit on the hour grid, because a task is due *by* a date, not scheduled at a clock time. No task chip prints a time anywhere; calls and meetings keep theirs. The rail caps at 4 and scrolls (visible scrollbar so "4 of 10" never reads as "that's all").
11. **Drag-to-reschedule** — drag a meeting to a new slot (15-min snap); drag a task anywhere — even onto the hour grid — and it changes **date only**, never time.
12. **Right-click a chip** → Edit / Delete. **Right-click empty space** → New activity here (Meeting preselected, date filled; Day view also captures the quarter-hour slot) and Open day. Hover a day cell for the **+** shortcut.

13. Mention: with two-way calendar sync connected, meetings/calls push to Google/Outlook automatically — created, moved on edit, removed on delete.

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5. Newsfeed (`/newsfeed`)

A queue of your tracked contacts' LinkedIn posts — worked to zero, so posting activity becomes outreach timing.

Prep: Engagement flag on; captured posts inside the To-Review window (default 14 days), mostly unmarked; a couple already marked/cleared for the All view.

Walkthrough:

1. Frame it: a read-only feed of posts **observed** while reps browse LinkedIn — the CRM never fetches LinkedIn itself. Same table powers the per-contact Posts tab.
2. **It's a work queue, not a feed** — the default **To Review** view shows recent posts you haven't engaged with or cleared. Three ways a row leaves: engage, **Clear**, or age out of the window (admin-configurable, Settings → LinkedIn).
3. **A row** — author + LinkedIn/Sales Nav channel pill, post body, like/comment counts. Honesty detail worth saying out loud: a muted **–** means "never captured"; a real `0` shows `0` — the CRM never dresses up missing data as zero.
4. **Engagement marks** — record which reaction you left, whether you commented, whether you reposted. Marks are **yours** (teammates keep their own). The **first** mark on a post offers a prefilled follow-up task with quick-date chips — an offer, not a toll; the mark saves either way and never re-prompts.
5. **Rows don't vanish mid-click** — mark or Clear a row in To Review and it stays put, struck through with **undo**, until you leave the page.
6. **Clear** = "looked, nothing to do" — switch to **All** and the cleared row is still there with undo. Triage hides work; it never erases it.
7. **Filters** — To Review / All, temperature (Warm), source (LinkedIn / Sales Nav), post kind, Engaged (including "Reposted by me"). Sort any column; everything lives in the URL. Columns button + pinned header, per-device layout.
8. **Right-click** — Open contact / Open post on LinkedIn / New email / Add follow-up task / Copy post link.
9. Hop to a contact's **Posts tab** briefly: same table scoped to one person, plus **Refresh posts** — it opens their LinkedIn activity in a new tab (capture is observe-only; your visit is the sync) and refetches. If the extension isn't answering, the button warns instead of promising a sync it can't deliver.

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6. Signals (`/signals`)

The inbound engagement inbox — who commented, reacted, reshared, viewed your profile, accepted your invite, followed you.

Prep: Signals flag on; your LinkedIn identity claimed via the extension ("This is Me"); a recent visit to your LinkedIn notifications page so freshness is green; rows in Needs Review including at least one engager who is **not** in the CRM yet.

Walkthrough:

1. Frame it: captured passively when **you** open your LinkedIn notifications — never polled. The sidebar badge shows the unactioned count and **dims** when the last check is stale.
2. **Header** — freshness ("Checked … ago") and the **Check LinkedIn notifications** button. Say the rule: freshness reports when capture last **looked**, not when it last found something — a quiet week reads "checked today, nothing new", never as a stale feed.

3. **Rows** — day-grouped; reactions on the same post collapse into one expandable row. Photos degrade to initials, never broken images.
4. **Filter chips** — **Needs Review** (the default; the goal is zero) · Not in CRM · In CRM · Warm · Comments · **All** (everything not dismissed, including what you've handled).
5. **Vet before you add** — the actor's **name always links to their LinkedIn profile**, even on matched rows; on a matched row the contact link goes to the CRM record. Two links, two destinations.
6. **Row actions: Dismiss** (first-class button — the most common verdict); **Add to CRM** on an unmatched engager — the temperature picker (Warm / Neutral / Cold with cadence labels) creates the contact **and** auto-schedules the follow-up task per the tenant cadence — do this live, then show the task on /tasks; **Follow up** on a matched contact — opens the Schedule modal.
7. **Duplicate guard** — if a name resembles an existing contact, the row proactively offers "may already be in CRM — Link to existing / Add as new"; it never silently duplicates.
8. Mention "This is Me": signals file to the **LinkedIn identity that received them**, not the CRM seat that captured them — so a shared CRM login still routes each rep's notifications to their own inbox. Unclaimed = nothing captured.

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7. Contacts (`/contacts`)

The flagship list view + the contact record. Big surface — consider two videos: the list, then the record detail.

Prep: the staged contact base; the Lead Gen pack's saved views present ("My Open Prospects", "New Replies This Week"); a contact with rich history (conversations, posts, activities, a file) to open for the detail half.

Walkthrough — the list:

1. Header — title, total count, **Filter** (with active-count badge), **+ New**, **Import**, **Export** (honors current filters/sort/columns).
2. **View tabs** — "All contacts" plus saved views; **+** saves the current filter/sort as a named view; admins can **Set as default** for the whole tenant on shared views.
3. **Filtering** — add a filter (field / operator / value), chips are removable; show a dynamic token: **$me** on Owner, or `{$relativeDays}` behind "Added This Week". Then the money line: **the URL holds everything** — filters, sort, page — refresh it, share it, it round-trips.
4. **Columns** — drag to resize/reorder, Columns panel to show/hide; persists per entity per device; pinned header while scrolling.
5. **Clickable cells** — the email cell opens the **in-app composer** (not mailto: — mail from a desktop client never reaches the timeline, which is the whole point); phone is tel:; company cell jumps to the company.
6. **Badge columns** — Temperature / Source / Stage, colored per tenant config, all **click-to-edit** in place: option popovers, Clear on Temperature/Source (not Stage — a record can't move to no-stage), retired stages never offered.
7. **Right-click** — the full menu: Open / new tab / Copy / Email / LinkedIn / Move to stage / Assign owner / Set-field quick-sets / Add task / Add note / Delete (admin) — and it's multi-select aware: select several rows, right-click, act on all.
8. **Quick Create** (+ New) — the server's own validation; entering a LinkedIn URL triggers the duplicate check; **there is no Stage field on any form** — new contacts land in the funnel's landing stage automatically and appear on the board immediately.
9. **CSV import** (Import) — quick pass over the three steps: Upload → Map columns (auto-matched, overridable) → Review (dry-run "N valid, M errors" per row) → Commit with the progress page. Bad rows don't block good ones.

Walkthrough — the record (click a contact):

10. **Left pane** — avatar, name, title, company; the action row (Contact details card, Email → composer, Call, LinkedIn, Sales Nav — styling shows whether a link *works*, tooltips report capture state); inline-editable field groups: About (email is click-to-compose; the pencil edits it), the **Owner** picker, Lead scoring, custom fields. Dropdowns and checkboxes **save on select**; text saves on blur/Enter. No Stage row — the rail is the stage control.
11. **Right pane** — the **pipeline rail**: stage chips in tenant colors; click to advance (optimistic, rolls back on error). Below: stage history, related company, tags.
12. **Tabs (URL-backed — `?tab=…` is shareable):**
    - **Activity** — Focus (open items) over History (everything that already happened, server-paged with a true total; 📎 counts on emails with attachments). Clicking a logged item opens a **view-first** modal — read it at full width before any edit form.
    - **Conversations** — email + LinkedIn/Sales Nav threads merged; LinkedIn thread pinned with the capturing rep's name; Reply on email threads; the "LinkedIn Messages" / "Sales Nav Messages" quick-nav links.
    - **Posts** — the Newsfeed table scoped to this contact + Refresh posts (covered in video 5; one line here).
    - **Tasks / Calendar** — this contact's to-dos and their week calendar (drag works here too).
    - **Notes** — with the type/direction columns dropped (the tab already says what they are).
    - **Files** — upload on pick, download-always (never inline), delete with confirm; refusals show the server's reason verbatim; per-file size and 10-file cap stated in the picker; a file from a removed user survives as "(removed user)".
13. Close on **temperature + the follow-up rule**: rate a contact Warm and a follow-up task appears automatically per the tenant cadence (Warm → 3 business days by default); re-rating **reschedules the same task**, never stacks.

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8. Contact Funnel (`/contacts/board`)

The kanban over the contact pipeline.

Prep: contacts spread across all visible stages; at least a couple of columns with enough cards to show "Load more". If you can, have one retired stage still holding a record (tagged "(retired)") for the honesty talking point.

Walkthrough:

1. Frame it: the same contacts as the list, laid out by funnel stage — the seeded funnel reads New Lead → Contacted → Replied → Meeting Booked → Follow up → Closed Won.
2. **Columns** — stage name + server-side count in each header; "Load more" pagination inside a column.
3. **Drag a card** to the next stage — the stage advances, the same mutation as the detail rail and the list's Stage popover. The card count updates.
4. **Click vs drag** — clicking the card's **name** opens the record; dragging by the name still drags. Click opens, drag moves.
5. **All / Mine toggle** — scope the board to your own contacts.
6. **Right-click a card** — Open / Copy / Move to stage / Assign owner / Add task / Add note (no Delete here).
7. If staged: a **retired** stage's column renders disabled as a drop target and tagged "(retired)" while it drains — records are never silently hidden, and the column disappears on its own at zero.
8. Mention: the board stays smooth at 200+ cards (virtualized), and Read Only users see it but can't drag.

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9. Companies (`/companies`)

Short video — same list machinery as Contacts, plus the company record's related panels.

Prep: several companies, one with related contacts (and deals if Deals is on).

Walkthrough:

1. The list — same engine as Contacts (filters, saved views, columns, URL state, right-click, Export); no Import (contacts only). Keep this brief and reference the Contacts video rather than re-demoing.
2. Open a company: **Details + Owner** on the left, **Related Contacts** (and Related Deals where enabled) on the right — the pivot from a person to everyone at the account.
3. Tabs — same set as contacts, with Activity as a single "Recent activity" feed; Files works here too (the Files tab exists on **every** entity's detail page).
4. Quick-create a company from the topbar or the `2` key.

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10. Reports (`/reports`)

The Lead Gen pack's three shipped reports.

Prep: enough data for the bars to look real — contacts across stages, replies spread over recent days, contacts with varied Sources.

Walkthrough:

1. Frame it: reporting is deliberately focused for now — the three reports the lead-gen workflow actually needs, computed live from your data.
2. **Funnel conversion** — horizontal bars per pipeline stage with count and % — where prospects are and where they stall. Stages mirror your pipeline config, retired stages included only while they still hold records.
3. **Replies by day** — vertical day columns with a **7 / 30 / 90-day** window selector — is outreach getting responses, and when.
4. **Lead sources** — where contacts come from, driven by the Source dropdown (which is why Source stays a governed vocabulary).
5. Mention: this page is module-gated — an admin can turn Reports off in Settings → Vertical pack and the entry leaves the sidebar.

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11. My account → Email (`/settings/email`)

Per-user mailbox connection — the engine behind reply, compose, sync, and timelines.

Prep: ideally record with a mailbox **not yet connected**, connect on camera, or stage a second account. Have the BCC address visible.

Walkthrough:

1. Frame it: per-user, all roles — each rep connects their **own** mailbox; mail sends as them and their inbound mail syncs to contact timelines.
2. **Connect** — Gmail or Microsoft 365 via OAuth. (A provider the deployment hasn't configured greys out with "(not configured)" — an operator matter, not a user error.)
3. Connected state — address, provider, sync status, Disconnect.
4. **What sync does** — inbound mail appears within ~5 minutes as email activities on contacts matched by exact email; unmatched mail creates nothing (no noise).
5. **BCC-to-CRM address** — copy it; BCC it from any mail client and that message lands on the matching contact's timeline even when sent outside the CRM.
6. **Disconnect is soft** — synced messages stay on timelines; reconnecting makes old threads repliable again. Nothing is lost.

7. Mention the sibling page: **Settings** → **Calendar** connects Google Calendar or Outlook, read-only (overlay in the scheduler) or two-way (CRM meetings/calls push out). Give it 30 seconds here or its own segment in the Settings video.

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12. Admin → Settings (`/settings`)

The admin hub. The sidebar entry opens onto General, but the settings area has its own left sub-nav with ~10 pages. Recommendation: record this as a short hub-tour video plus separate videos for the four deep pages — Entities & fields, Pipelines, Vertical pack, and LinkedIn — which are each video-sized on their own.

Settings sub-nav (admin view): General · Members · Entities & fields · Pipelines · Vertical pack · Email · Calendar · Message templates · API keys · Webhooks · LinkedIn. (Members and API keys have their own sidebar entries — videos 13 and 14 — and Email/Calendar are covered in video 11.)

12a. General (`/settings`)

1. Workspace name (rename works) and slug (locked after provisioning). Brief.

12b. Entities & fields (`/settings/entities`)

1. Frame it: the custom-objects engine — every workspace can shape its own fields on Contact, Company, Deal, and pack entities.
2. **Add a custom field** live: display name, watch the **API field key** pre-fill as camelCase (detaches when hand-edited; duplicate keys — including deleted fields' keys — warn before submit), type, required.
3. Show the new field appearing immediately in the record form / detail / filters / import mapper.
4. **Dropdown option colors** — curated swatches plus any **custom hex** with a live light/dark badge preview; a low-contrast pick warns but still saves.
5. **Hidden** — hide a field from forms/detail/lists/filters while keeping the data in export and search; works on system fields (the LinkedIn identity fields ship hidden); Required + Hidden is blocked.
6. **Show in right-click menu** — puts a Set-{field} quick-set on list-row context menus; pre-checked for new dropdowns.
7. **Allow adding options from forms** — default OFF; when on, reps get "+ Add {field}…" everywhere the field is edited; append-only and audited. The pack turns it on for Source only — reporting reads these vocabularies.

12c. Pipelines (`/settings/pipelines`)

1. Each pipeline with its stages; won/lost flags; default badge.
2. **Rename** a stage inline (pencil) — every record in the old-named stage follows; nothing drops off the kanban.
3. **Retire** (eye) — retire-not-delete: the stage stops being a destination everywhere but records still in it keep rendering, tagged "(retired)", until it drains. Retiring the last visible stage is refused.
4. **"New records land here"** — the landing-stage marker; move it with the target icon. This is where extension Add-to-CRM, Signals add, and Quick Create start new records.

12d. Vertical pack (`/settings/pack`)

1. The installed pack card (name, version, install date) + **per-module toggles** — turn Reports off, show the sidebar entry vanish and the in-page notice, turn it back on live. Data always preserved.
2. **Available packs** catalog with self-serve Install (create-missing / skip-existing — never overwrites).
3. **Deals master switch** — hides Deals nav/board/"New deal" wholesale; records preserved.
4. **Follow-up rule card** — the per-temperature offsets behind the automatic follow-up tasks (Warm / Neutral / Cold; blank = off).

12e. Message templates (`/settings/reply-templates`)

1. Template list — Title, Channel (Email / LinkedIn), Scope (Personal / Team).
2. Create one; **Share with the team** is admin-only; channel locks after creation (dialog defaults to Email).
3. **Attachments on email templates** — paperclip in the dialog; 📎 marker in the list and the composer picker; inserting a template brings its files into the draft; Cancel in the edit dialog never loses a template's files.
4. Mention: templates are also editable from the composer's picker via the row pencil (own templates for Members; shared ones admin-only).

12f. Webhooks (`/settings/webhooks`)

1. Create a subscription — HTTPS URL, event types; signing secret shown **once**.
2. The **Deliveries** page — last 50 attempts with status, attempt count, outcome. Integration debugging without support tickets.

12g. LinkedIn (`/settings/linkedin`)

1. Frame it: the control panel for the whole LinkedIn integration — every toggle defaults OFF; the risky ones are consent-gated.
2. **Capture** — turning on reveals capture-token management (`ngk_ext_` tokens shown once, revocable) and the **Rep capture health** card (per-teammate connected badge, last capture time).
3. **Reply** — the account-risk **consent modal** (records admin, IP, version; withdrawable).
4. **Engagement** — drives Newsfeed + Posts tab; the **To-Review window** setting (default 14 days) lives here.
5. **Signals** — master switch + per-kind sub-toggles, the Network-activity gate, and the linked-LinkedIn-accounts list.
6. **Reply templates / Follow-up reminders / Scheduled send** — the three composer-affordance flags.
7. Show a toggle taking effect live — nav and composer update without a reload.

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13. Admin → Members (`/settings/members`)

Seats, roles, and the user lifecycle.

Prep: a few users in mixed states — active teammates, one invited (amber), one suspended (red). Don't demo destructive actions on a real teammate; stage a throwaway user to suspend/remove on camera.

Walkthrough:

1. The table — name, email, role, status badge (active green / invited amber / suspended red), last login.
2. **Invite user** — Email, optional name, Role (Admin / Member / Read Only). The row appears as "invited" and activates on their first sign-in — no passwords to manage.
3. One minute on the **three roles**: Admin (everything), Member (full daily work, no admin pages, no deletes, no shared views/templates), Read Only (browse and export everything, change nothing).
4. The row **kebab menu** (never on your own row):
   - **Change role** — takes effect on the target's next request, no re-sign-in; works on invited users too (their only menu entry); demoting the last active Admin is refused.
   - **Suspend** — access ends on their next request; extension tokens revoked, email/calendar soft-disconnected; **Reactivate** undoes it instantly.
   - **Remove** — access ends immediately; their records, notes, and history are **kept** (attribution preserved); re-inviting the same email reactivates the row.
5. Close on the safety rails: you can't act on yourself, and a workspace always keeps at least one active Admin.

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14. Admin → API Keys (`/settings/api-keys`)

The public API surface — keys, usage, docs.

Prep: one or two existing keys with some usage history so the 24-hour chart isn't empty. Never show a real live key on camera — generate a throwaway and **revoke it on camera** as the final step.

Walkthrough:

1. Frame it: the public REST API (`/api/v1/*`) for integrations — Zapier-style tooling, internal scripts, partner systems.
2. The key table — name, created, last-used, Revoke.
3. **Generate API key** — the full `ngk_live_` key is shown **exactly once** with a copy button; after this dialog closes it can never be retrieved, only revoked and reissued.
4. **Usage chart** — requests per key over the last 24 hours.
5. **API reference** link — open `/api-docs` , scroll the OpenAPI-generated reference briefly: the docs are generated from the same schemas that validate requests, so they can't drift.
6. **Revoke** the demo key on camera — immediate.
7. Mention: keys act with the minting user's authority and are rate-limited per key and per workspace.

Appendix A — menu entries not in this sidebar today

These exist in the product but are hidden in this workspace by module/flag state. Decide separately whether each gets a video (they'd be needed for a deployment where they're on):

- **Deals** (`/deals`) + **Deal Pipeline** (`/deals/board`) — hidden when the Deals master switch is off. The Companies + Contact Funnel videos cover 90% of their mechanics (same list, same board).
- **Campaigns** (`/campaigns`) + **Campaign Board** (`/campaigns/board`) — pack module currently off. Same list/board machinery over the Campaign entity.
- **Outreach** — a "Coming soon" stub; no video.
- **Settings → Calendar** (`/settings/calendar`) — no top-level sidebar entry; covered as the coda of video 11 or a segment of video 12.
- **SuperAdmin section** — operator-only (All Users, Partners, Billing, Branding, Email attachments, Record files, Extension Health, Feedback, QA Checklist). Internal tooling; not customer demo material.
- **The capture extension itself** (options page, Add-to-CRM pill, capture status) — not a menu entry but arguably the most demo-worthy feature in the product; QA guide §4.18 has the full walkthrough if you want a dedicated extension video.

Appendix B — recording gotchas

- **Ownership:** /tasks, the calendar, and Signals are per-user views. Stage demo activities and signals under the account you record with, or the pages look empty.
- **Never-checked vs zero:** several surfaces (Home To-review, Signals freshness, Newsfeed counts) deliberately distinguish "no data" from "haven't looked". If a queue reads "Not checked yet", run the extension over the relevant LinkedIn page before recording — or lean into it as a talking point.
- **Extension pill:** if the sidebar shows "Extension off" / "Extension mismatch", fix it before recording the LinkedIn videos (right build for this deployment, enabled, token pasted) — every capture-dependent surface picks up warning glyphs while it's unhappy.
- **One-time secrets:** API keys, webhook secrets, and capture tokens display once. Use throwaways and revoke on camera.
- **URL state is a recurring demo beat:** filters, sorts, tabs, pages, and views all round-trip through the URL on every list surface — refresh mid-demo once per video to prove it; it's one of the product's quiet differentiators.
- **Consistency:** same theme, density, window size, and workspace across all videos so the series cuts together.