LeadLight User Guide

This guide is the source for the LeadLight in-app Help window. It explains how to use LeadLight in everyday language.

LeadLight helps you:

- keep all contact follow-up in one place
- start from a clear dashboard instead of holding the business in your head
- see what needs doing today
- import LifeWave, systeme.io, and custom contact files safely
- protect notes, tasks, and history when source data is refreshed
- write safer one-to-one email follow-up
- send a saved email template to selected contacts when email sending is configured
- build reusable email campaigns and monitor campaign send status
- check email wording against compliance guidance
- ask LifeWave compensation-plan questions from the context hub and your imported data
- create reusable task workflows
- tag contacts and work with selected groups
- manage workspace users, email settings, referrals, and workspace settings

Technical setup, server commands, API keys, environment variables, and production operations belong in the admin runbooks, not this guide.

Access

Open the LeadLight link given to you by your workspace owner.

Sign in with your email address and password. If you have just received a setup link, use that link first to create your password.

If your email has access to more than one workspace, use the workspace selector in the header to switch between them. The active workspace controls what you can see. Contacts, tasks, imports, templates, exports, reports, users, and settings are kept separate by workspace.

Some workspaces may also have their own short link, such as a workspace slug link. Use the link your owner gives you.

Use **Log Out** when you are finished, especially on a shared computer.

Plan Availability

Some features depend on the workspace plan.

Navigator workspaces can use contacts, tasks, business tasks, workflows, imports, exports, and workspace management.

Captain workspaces unlock Ask Coach and email functionality, including email templates, selected-contact email, and email campaigns.

When a feature is locked, LeadLight shows a plan message and, where configured, an **Unlock with Captain Plan** button. Upgrades and downgrades should preserve the workspace and its data.

Help

Use **Help** in the top bar to open this guide inside LeadLight.

The Help window opens to the topic that best matches the page you are using, such as Dashboard, Today, Contacts, Contact Detail, Comp Plan, or an Admin section.

Use the section list in Help to jump to another topic. Use the search box to find words or phrases.

On a contact detail page, use the page-level **Help** button for contact-specific help.

Passwords

Use **Change Password** from the account menu to update your own password.

You need:

- your current password
- a new password of at least 10 characters
- the new password entered twice

After you change your password, other active sessions for your account are signed out.

If you forget your password, ask a workspace owner to send you a fresh setup or password reset link from **Admin > Workspace**.

Workspace owners should keep at least two owner accounts in an active workspace so one owner can help another owner regain access.

Header Tools

The header gives quick access to common tools:

- **Workspace selector** changes the active workspace when your account belongs to more than one workspace.

- **Quick Add** captures a task, business task, note, activity, or workflow without leaving the current page.
- **Help** opens this guide.
- **Change Password** updates your password.
- **Log Out** signs you out.

On smaller screens, account actions may sit inside the account menu rather than showing as separate buttons.

Quick Add

Use **Quick Add** when you need to capture something quickly.

Quick Add can:

- add a task for a contact
- add a business task for the workspace
- add a note to a contact
- log an activity for a contact
- apply a workflow template to a contact

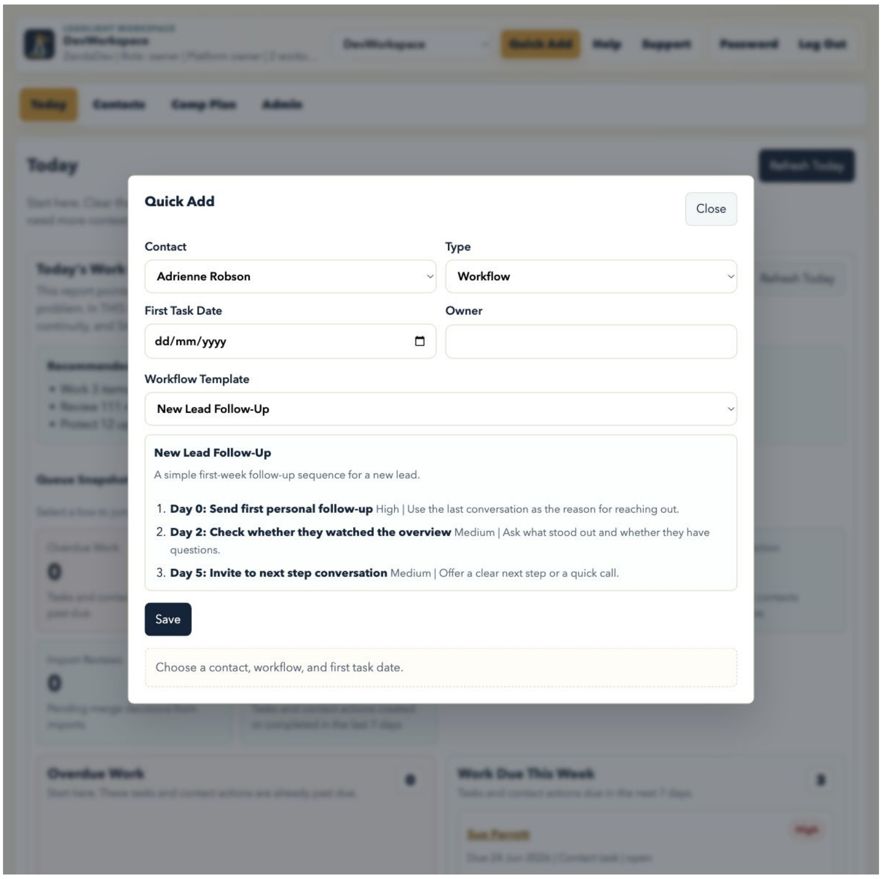
Choose **Contact Task** when the work belongs to one person. Examples:

- call Sarah on Friday
- send a follow-up message to Jamie
- check whether Alex reordered

Choose **Business Task** when the work belongs to the workspace rather than one contact. Examples:

- send newsletter to all BPs
- prepare team call notes
- review the no-order list
- update a campaign

Choose **Workflow** when you want LeadLight to schedule a saved sequence of tasks for a contact. Pick the contact, choose the workflow template, set the first task date, review the preview, then save.



LeadLight Quick Add workflow mode

Main Tabs

LeadLight has five main tabs:

- **Dashboard** is the best place to start the day and decide what to work on next.
- **Today** shows the daily work queue.
- **Contacts** is where you find and manage people.
- **Comp Plan** answers LifeWave compensation and business-coaching questions.
- **Admin** holds imports, reviews, duplicates, email templates, email campaigns, campaign send monitoring, exports, workflow templates, and workspace settings.

Most daily work starts in **Dashboard**, **Today**, or **Contacts**. Owners use **Admin** for setup and data management.

Dashboard

Use **Dashboard** as your calm starting point for the business.

The Dashboard is designed to remove overwhelm. Instead of remembering every follow-up, renewal risk, business task, and important contact, start here and let LeadLight show the work that most needs your attention.

Dashboard helps you answer:

- what needs doing first
- what is overdue
- what is due this week
- which customer relationships need care
- which team builders need support
- which important contacts do not have a clear next step
- what has already been completed today

The top signals show a fast read of the workspace:

- **Overdue**: work that should already have been handled.
- **Due this week**: upcoming work with a due date.
- **Completed today**: recent progress so you can see momentum.

The main recommendation area highlights the next useful item to work. Use this when you want LeadLight to reduce the decision load and show a sensible place to begin.

The work tiles open focused lists:

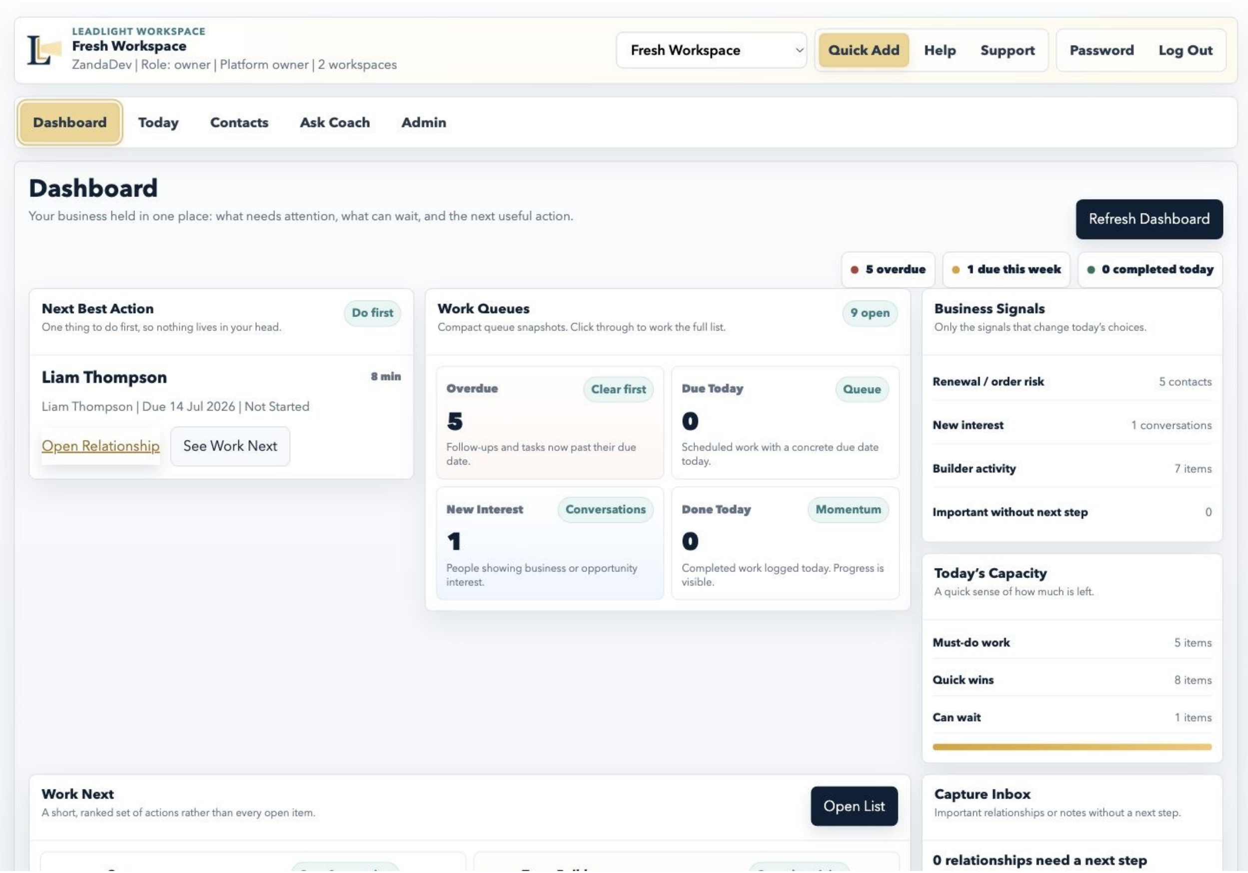
- **Overdue** shows overdue tasks, actions, notes, and business tasks.
- **Due Today** shows work due now.
- **New Interest** shows fresh conversations and early-stage opportunities.
- **Done Today** shows completed work for the day.

The relationship focus area separates different types of work:

- **Customer Care** highlights customers needing product support, renewal protection, no-order review, or continuity attention.
- **Team Builders** highlights Brand Partners and serious builders who may need coaching, activation, or business support.
- **Important without next step** highlights priority contacts that need a clear next action.

When the same contact has several open items, Dashboard tries to show the relationship once and uses the most urgent item as the visible next action. If there is more than one open item, the row can show an open item count so you know there is more to handle.

Business tasks are included in the work lists when they have a due date. Use these for workspace-level work such as newsletters, team calls, campaign checks, or business planning.



LeadLight Dashboard workspace view

To work from Dashboard:

- Open **Dashboard** at the start of the session.
- Check the top signals for overdue and due-this-week work.
- Review the recommended next item.
- Choose **Open** to work the item, or choose a tile to open a focused list.
- Clear the item from the task, action, note, or contact pane.
- Close the item to return to the Dashboard list you were working from.
- Continue down the focused list until the important work is clear.
- Use **Refresh Dashboard** after making several changes, importing data, or completing review work.

Use the customer and builder split to choose the right mindset:

- For **Customers**, think retention, product confidence, reorder support, education, and care.
- For **Team Builders**, think activation, belief, simple next steps, duplication, rank progress, and leadership rhythm.

Dashboard classification depends on the contact data available. LeadLight looks at signals such as lifecycle stage, relationship, CRM stage, rank data, business-building wording, order risk, renewal signals, and customer status. If a contact appears in the wrong area, check the contact's workflow fields, relationship, tags, LifeWave source data, next action, and task wording.

Good Dashboard habits:

- Start with the recommended next item when you feel overloaded.
- Use the focused lists instead of scanning the full contact database.
- Keep due dates current so work appears at the right time.
- Add a clear next action before leaving an important contact.
- Use **Quick Add** when new work appears while you are clearing the list.
- Check **Today** when you want the more detailed operational queue view.

Today

Use **Today** as your daily work list.

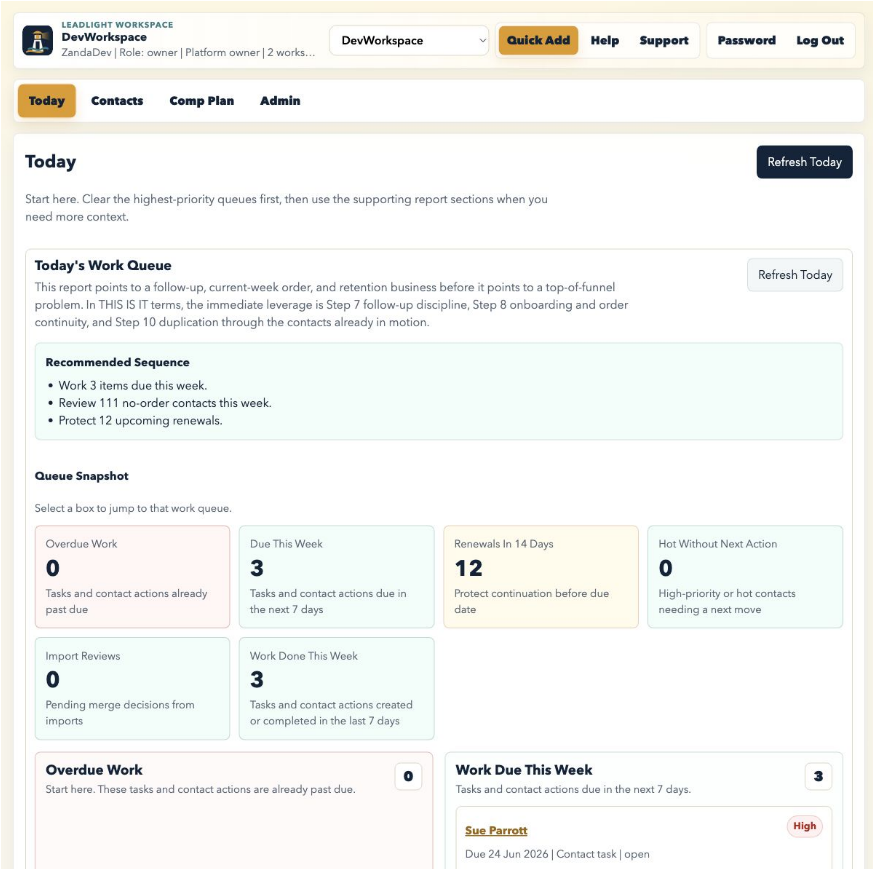
Today brings together:

- overdue contact actions
- overdue contact tasks
- overdue business tasks
- work due this week
- renewal risks
- no-order review items
- completed work from this week
- import reviews that need decisions
- pipeline and workspace snapshots

Use **Edit Task**, **Edit Contact Action**, or **Mark Done** to keep the queue clean.

Business tasks appear in Today as workspace tasks. They can be completed from the queue and then move into recent work history.

Use **Refresh Today** after imports, task edits, contact updates, or review decisions.



LeadLight Today work queue

Contacts

Use **Contacts** to find, open, add, and manage people.

You can search by:

- name
- email
- phone
- business

You can filter by:

- status
- priority
- source system
- action state
- lifecycle stage
- MSO status
- city or town

- relationship
- renewal window
- saved views

Use **More Filters** for detailed filtering. Leave a field as **Any** when you do not want that filter.

From Contacts you can:

- add a manual contact
- refresh the list
- open a contact detail page
- save a filtered list as a saved view
- reload a saved view later
- delete a saved view
- create and apply contact tags
- select contacts and apply a tag to the selected group
- select contacts and send a saved email template to them
- select contacts and apply an email campaign
- delete contacts after confirmation
- load more contacts when there are more results

Use saved views for lists you check often, such as high-priority follow-up, renewal protection, LifeWave contacts, systeme.io contacts, a city list, or a cleanup list.

Tags And Selected Contacts

Use tags to group contacts in a way that matches how you work.

Examples:

- event follow-up
- local team
- renewal focus
- customer education
- product interest
- BP activation

Open the **Tags** toolbar on Contacts to create a tag, choose a tag, and add or remove it from selected contacts.

To work with a group:

- Filter or search Contacts until the right people are visible.
- Select the contacts you want.

- Open the **Tags** toolbar.
- Add or remove a tag, start a bulk email, or add an email campaign.

Bulk actions apply only to the contacts you selected. Review the selected count before applying a tag, sending an email, or adding a campaign.

Contact Detail

Open a contact to see the full record.

The contact detail page includes:

- **Workflow**: lifecycle stage, status, priority, CRM stage, relationship, owners, next action, contacted flag, and follow-up timing.
- **Core Contact Details**: name, email, phone, business, address, state or region, country, and email opt-out.
- **Notes**: your CRM notes and relationship detail.
- **Open Items**: active tasks, next actions, and notes that still need attention.
- **Timeline**: completed activities, notes, outreach, imports, and history.
- **Advanced CRM Fields**: extra classification and source-adjacent fields.
- **Source Links**: LifeWave and systeme.io source identity.
- **Tags**: contact tags used for grouping and filtering.
- **LifeWave Source Data**: imported LifeWave fields such as rank, MSO, PV, TDV, binary side, and next-rank progress when available.

Use the save button in the pane you changed. Changes in one pane are not saved until you use that pane's save action.

Phone fields format as you type where possible. Address and state or region sit with the main contact details so they are easier to find.

Use **Email opt-out** when a contact should not receive email from LeadLight. Opted-out contacts are protected by the email sender and by email campaign automation.

Use **Delete Contact** only when the person should be removed from the workspace. LeadLight asks for confirmation before deleting.

Tasks And Activities

Use tasks for future work. Use activities and notes for history.

Tasks can have:

- title
- due date

- priority
- owner
- notes

Create tasks from Quick Add or from a contact page. Edit tasks from the contact page or Today. Mark a task done when the work is complete.

Business tasks are not attached to a contact. They are for workspace work such as newsletters, team calls, campaign review, or checking a group of BPs.

Activities are for things that already happened, such as:

- call completed
- message sent
- meeting held
- note added
- outreach logged

Good history helps you remember what happened and helps Ask Coach understand the contact better.

Email Drafts

Use the email tools on a contact page to prepare one-to-one follow-up.

The email modal can:

- draft outreach from the contact's LeadLight context
- use saved workspace templates
- let you edit the subject and body
- run a compliance check
- save edited wording as a reusable template
- send through LeadLight when email sending is configured
- open your own email app as a fallback
- log outreach back to the contact history

Recommended flow:

- Open the contact.
- Open the email tool.
- Choose a draft type or template.
- Generate or write the email.
- Use **Compliance Check**.
- Remove any unsupported claim, income promise, pressure language, or unsafe wording.

- Send through LeadLight or open your email app.
- Log the activity if it should appear in the timeline.

LeadLight checks email wording against the compliance guidance in the context hub. It can flag medical or disease claims, income claims, pressure wording, unsupported discounts, and overstated result language.

LeadLight email tools are designed for practical, relationship-based follow-up rather than high-volume marketing blasts. The current LeadLight send limit is 50 sent emails per workspace per day. If the limit is reached, use **Open Email App** or wait until the next day.

Bulk Email To Selected Contacts

Use selected-contact bulk email when you want to send one saved template to a carefully chosen group.

You need:

- selected contacts on the Contacts page
- a saved email template
- workspace email sending configured
- contacts with email addresses who have not opted out

Recommended flow:

- Go to **Contacts**.
- Search, filter, or use a saved view to find the group.
- Select the contacts you want.
- Open **Tags**.
- Choose **Bulk Email**.
- Pick a saved email template.
- Use **Preview** to check how the template will personalize for the selected contacts.
- Send only when the preview looks right.

LeadLight fills supported placeholders such as `{{first_name}}`, `{{full_name}}`, `{{email}}`, `{{next_action}}`, and `{{rank_or_role}}`.

Bulk email skips contacts that cannot be sent safely, such as contacts with no email address or contacts marked as opted out. It still counts successful sends toward the workspace daily email limit.

Email Templates

Email templates are saved inside one workspace. A template in one workspace is not shared with another workspace.

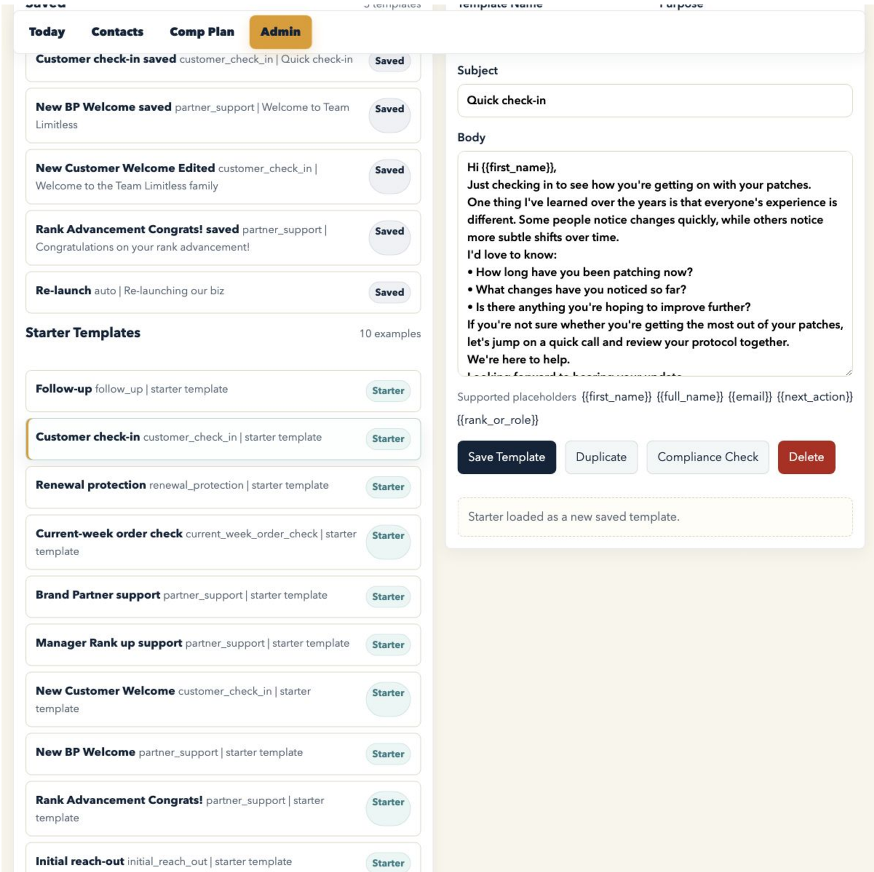
You can use templates:

- inside the contact email modal
- from **Admin > Email Templates**

Template tips:

- Use placeholders such as `{{first_name}}` when wording should personalize at send time.
- Run **Compliance Check** before saving important wording.
- If a template mentions product results, income, urgency, discounts, or promotions, check it carefully.
- Use **Duplicate** to create a similar template without changing the original.
- Use **Delete** only when the template should no longer be available.
- Keep templates short and natural when they are used in selected-contact email or campaigns.

Some starter templates may come from context-hub documents. Save a starter as a workspace template before tailoring it.



LeadLight email template compliance check

Email Campaigns

Email campaigns are reusable email task sequences built from saved email templates.

Use campaigns when a similar email sequence happens often, such as:

- new customer welcome

- new BP activation
- event follow-up
- renewal support
- reactivation
- product education follow-up

Owners manage campaigns from **Admin > Email Campaigns**.

A campaign includes:

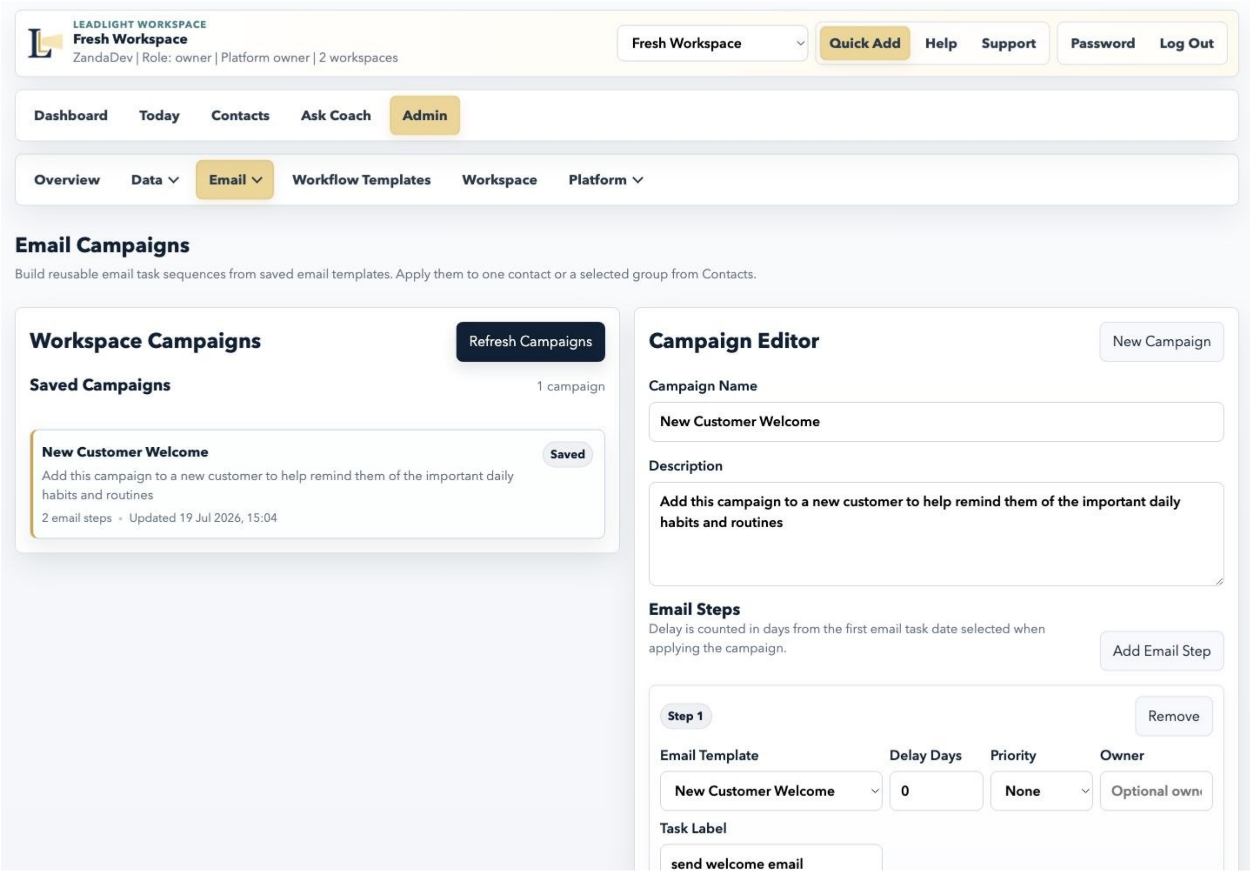
- a campaign name
- an optional description
- one or more email steps
- the saved email template for each step
- the delay in days for each step
- optional task label, owner, priority, and notes

The delay is counted from the first email task date chosen when the campaign is applied. It is not counted from the previous email step. A delay of `0` means the email task is due on the first date. A delay of `3` means it is due three days later.

Example: if a contact is added to a campaign with a first email task date of Monday, step delays of `0`, `3`, and `7` schedule emails for Monday, Thursday, and the following Monday.

To create a campaign:

- Go to **Admin > Email Campaigns**.
- Choose **New Campaign**.
- Add a name and description.
- Add one or more email steps.
- Choose a saved email template for each step.
- Set delay days and optional task details.
- Save the campaign.



LeadLight email campaign editor

To apply a campaign to selected contacts:

- Go to **Contacts**.
- Search, filter, or use a saved view.
- Select the contacts.
- Open **Tags**.
- Choose **Add Campaign**.
- Choose the campaign.
- Set the first email task date.
- Review the scheduled task preview.
- Leave **Automatically send due campaign emails** on if you want LeadLight to send due campaign emails when the safeguards pass.
- Apply the campaign.

To apply a campaign to one contact, open the contact and choose **Campaign** from the contact detail page.

Applying a campaign creates visible tasks for the contact. If automated sending is enabled, LeadLight also queues the campaign emails for their scheduled dates.

Campaign email safeguards:

- completed campaign tasks are not sent

- opted-out contacts are skipped
- contacts with no email address are skipped
- email delivery must be configured
- compliance and rendering checks still apply
- sends count toward the workspace daily email limit

Use **Admin > Campaign Sends** to see whether campaign emails are scheduled, sent, skipped, failed, or waiting for manual action.

Campaign Sends

Use **Admin > Campaign Sends** to monitor automated email campaign delivery.

This pane is read-only. It helps owners see what happened after campaigns were applied.

The status counters show:

- **Scheduled**: queued for a due date and not processed yet
- **Sent**: sent successfully through LeadLight email delivery
- **Skipped**: not sent because a safeguard applied, such as opt-out, missing email, or completed task
- **Failed**: tried but could not complete because of an error
- **Manual required**: needs human action, usually because email delivery is not configured or LeadLight cannot safely send automatically

Use the status filter to focus on one status. Use **Refresh Sends** after applying a campaign or after the background sender has had time to process due emails.

The table shows:

- scheduled date
- contact
- campaign
- template
- linked task
- attempts
- reason
- last update

If a campaign email did not send, check the **Reason** column first.

Workflow Templates

Workflow templates are saved sequences of tasks.

Use them when the same follow-up happens often, such as:

- new customer check-in
- new BP activation
- event follow-up
- renewal support
- reactivation follow-up

Owners manage workflow templates from **Admin > Workflow Templates**.

A workflow template includes:

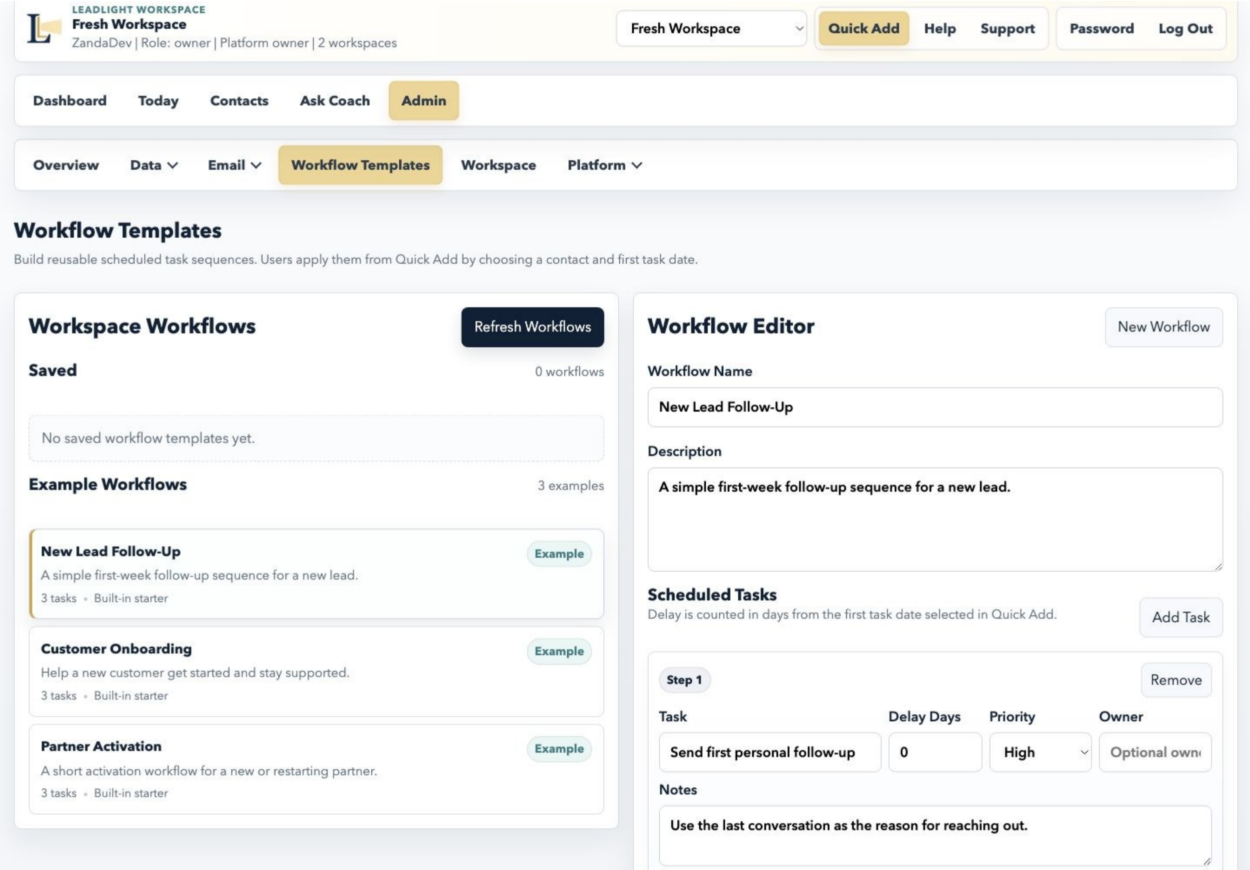
- a name
- a description
- one or more task steps
- the delay for each task, counted in days from the first task date
- optional owner, priority, and notes for each task

Starter workflow templates are available to every workspace. Owners can duplicate a starter, adjust it, and save it as a workspace template.

To apply a workflow:

- Open **Quick Add**.
- Choose **Workflow**.
- Select the contact.
- Choose the workflow template.
- Set the first task date.
- Review the task preview.
- Save the workflow.

If a task has delay `0`, it is due on the first task date. If it has delay `2`, it is due two days later. If it has delay `7`, it is due one week later.



LeadLight workflow template editor

Email Sending

When workspace email delivery is configured, **Send Email** sends the message through LeadLight.

Workspace email settings control:

- the sender display name
- the reply-to email address
- the workspace email signature when enabled

LeadLight controls the system sender address. Replies should go to the workspace reply-to address when the receiving email app respects Reply-To.

If a workspace email signature is enabled, LeadLight can append it to generated drafts and saved templates depending on the workspace setting. If no signature is selected, generated emails should still use the workspace sender name instead of a generic sign-off.

Use **Open Email App** when:

- you prefer to send from your own mail app
- LeadLight email delivery is not configured
- the workspace has reached the daily send limit

- you want a final review in your own email app

Local email apps use `mailto`, and different mail apps handle fields differently.

Comp Plan

Use **Comp Plan** to ask LifeWave compensation-plan and business-coaching questions.

Ask Coach can use:

- context-hub compensation notes
- official LifeWave source summaries in the context hub
- imported contact data in the active workspace
- LifeWave fields such as rank, PV, TDV, binary side, MSO, renewal date, and next-rank progress
- first-level enroller data for cleaner workspace TDV rollups when LifeWave level data is available

You can ask about:

- rank requirements
- who is closest to the next rank
- PV, QV, QDV, TDV, PIB, BV, MVR, OL2L, and other terms
- PC, PC+, Preferred Customer, and Preferred Customer Plus
- binary bonus, binary pay leg, binary power leg, and binary balancing
- left side and right side TDV totals when imported LifeWave data includes side and TDV
- renewal protection
- pack and PIB facts
- contact-specific next steps when a contact is selected
- weekly focus and business health

Example questions:

- "What is TDV?"
- "What is PC+?"
- "How does the PC+ Share Program work?"
- "Who is closest to the next rank?"
- "What is my left side total?"
- "How balanced is my binary?"
- "Which renewals need attention?"
- "What should I focus on this week?"
- "What does this contact need next?"

Ask Coach is only as good as the data and context available. If a LifeWave field has not been imported, LeadLight will say what is missing instead of pretending to know it.

Ask Coach is designed to answer in a practical coaching style. For contact questions, ask what you want to do with the person, such as "What should I do next with Chloe?" or "What can I say to motivate Jack?"

When Ask Coach suggests a follow-up task, you can create a task from the answer. LeadLight opens the normal Quick Add task workflow so you can review the title, contact, notes, and due date before saving.

Use the **Was this useful?** buttons and the free-text feedback box to help improve Ask Coach. Feedback stays on the Ask Coach screen after you submit it. Platform owners can review submitted Ask Coach feedback from the Platform area.

Admin

The **Admin** tab contains workspace-level tools.

Admin sections include:

- **Imports**
- **Review**
- **Duplicates**
- **Email Templates**
- **Email Campaigns**
- **Campaign Sends**
- **Workflow Templates**
- **Exports**
- **Workspace**

Some Admin tools are owner-only. Members can use LeadLight for contact work, but they cannot manage users or owner-level workspace settings.

The **Platform** admin section is only visible to the platform owner. Normal workspace owners and members should not see it.

Imports

Use **Admin > Imports** to bring contact data into the active workspace.

Supported file types:

- CSV
- XLS
- XLSX

Supported source choices:

- systeme.io
- LifeWave
- Custom CSV

The import flow can:

- download source templates
- preview a file before import
- check that the selected source matches the file
- map custom columns
- save mapping presets for repeated custom files
- import into the active workspace
- automatically apply safe approved refresh rows when no review is needed
- preserve CRM-owned work while refreshing source-owned data
- skip blank LifeWave Retail Customer rows when there is no useful contact information
- store state or region data when source files include it

LeadLight is designed to refresh source data without destroying your work. For existing contacts, source fields may update, but notes, tasks, activities, owners, priority, next action, and other CRM-owned fields are protected.

Best practice:

- Choose the correct source.
- Upload the file.
- Review the preview and mapping.
- Save or select a custom mapping if needed.
- Run the import.
- If LeadLight says review is needed, go to **Admin > Review**.
- Approve safe matches.
- Use **Apply Approved** to finish the import work.

If there are no review decisions to make, LeadLight may apply safe approved updates automatically. If you try to leave before unfinished import work is applied, LeadLight warns you.

Review

Use **Admin > Review** after imports.

Review shows possible matches between new source rows and existing contacts.

Approve a match only when the source row and existing contact are the same person. Reject it when they should stay separate.

When approved matches are applied, LeadLight refreshes source-owned data and keeps your CRM-owned work.

Use:

- **Approve** for one match
- **Reject** when it is not the same person
- **Approve All** only when every listed match is safe
- **Apply Approved** to finish the approved merge decisions

After approved matches are applied, the import warning should clear. If the Review tab is empty, there should be nothing left to apply.

Duplicates

Use **Admin > Duplicates** to review likely duplicate contacts already in LeadLight.

The duplicate review shows:

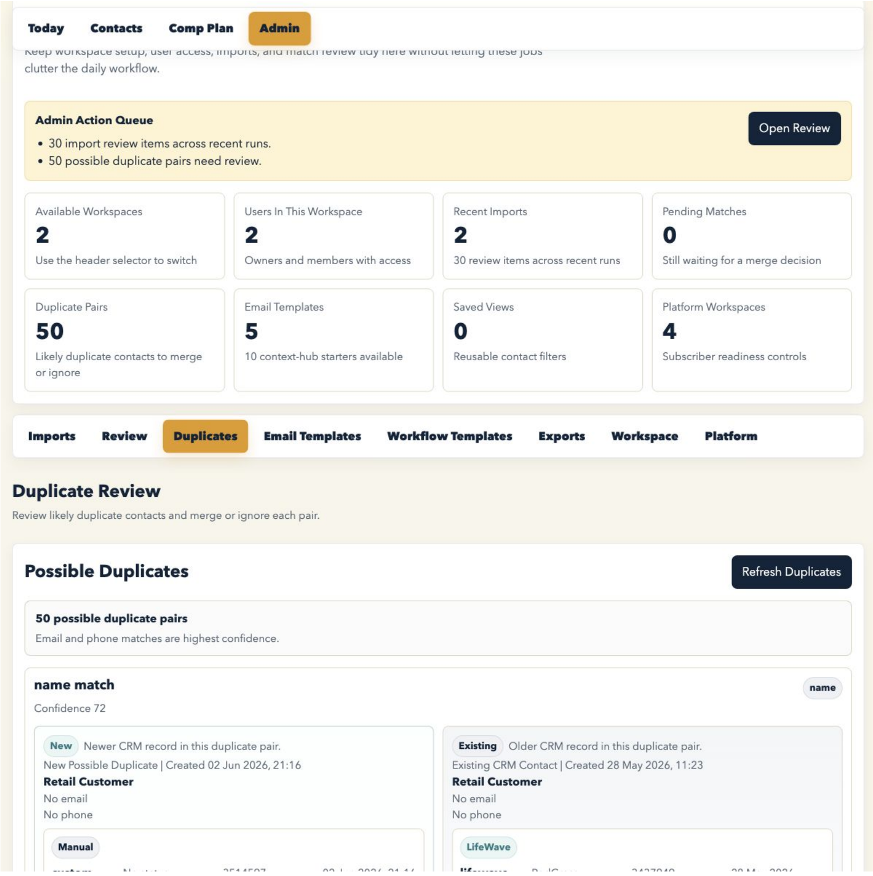
- the two possible duplicate records
- source information for each record
- which one appears to be the existing record
- which one appears to be the newer possible duplicate
- recent history clues

Use **Keep Existing** when the existing record should remain as the main record.

Use **Keep New** when the newer record should remain as the main record.

Use **Not A Duplicate** when the two records are different people.

When you merge, LeadLight keeps useful history and removes the duplicate record.



LeadLight duplicate review

Exports

Use **Admin > Exports** to download contact data from the active workspace.

You can choose:

- source buckets, such as all contacts, manual contacts, LifeWave, or systeme.io
- exact fields to include
- full field groups or individual fields

Use exports for review, cleanup, outside analysis, or handoff. Exported files contain contact data, so keep them private and delete them when you no longer need them.

Downloaded CSV files are handled by your browser. They usually go to the browser's default Downloads folder unless your browser asks where to save them.

Workspace

Use **Admin > Workspace** for owner-level workspace settings.

Workspace owners can:

- rename the workspace
- edit the workspace slug
- upload a workspace logo
- set the email sender name
- set the reply-to email address
- enable and edit the workspace email signature
- choose whether the signature is appended to saved templates
- create workspace users
- add an existing user to the current workspace
- change a user's workspace role
- reset a user's password
- remove a user from the workspace
- copy the referral link
- save referral payout details

The workspace slug is the short workspace identifier used in workspace links. Use lowercase letters, numbers, and hyphens.

New customer workspaces are normally created after a LeadLight subscription purchase and Systeme webhook, not manually by normal users. The platform owner has separate platform tools for recovery and support.

Workspace roles:

- **Owner** can manage workspace settings, users, imports, templates, and admin tools.
- **Member** can use LeadLight for day-to-day work but cannot manage owner-only settings.

Workspace isolation is active. Each workspace has its own contacts, imports, tasks, activities, templates, exports, reports, and users.

Share The Light Referrals

Workspace owners can use **Admin > Workspace > Share The Light** to copy their referral link and save payout details.

The referral link sends the buyer to the LeadLight sales or checkout page. It does not create a workspace by itself.

After the buyer purchases, Systeme sends LeadLight a webhook. LeadLight then provisions the buyer's workspace and links the referral to the referring workspace owner when the referral code is present.

Referral rewards are tracked in LeadLight. Rewards can move through stages such as pending, qualified, approved, paid, or cancelled.

Current monthly referral commission amounts are:

- Starter: NZ$2.25 per active subscription month
- Growth: NZ$7.25 per active subscription month

Referral payouts are managed manually through Wise by the platform owner. Workspace owners should keep their Wise payout details up to date.

Platform Owner Tools

The Platform admin section is only for the platform owner.

It can include tools for:

- launch readiness checks
- subscriber workspace status
- manual subscriber provisioning when checkout or webhook recovery needs support
- workspace archive/delete and restore tools
- Ask Coach feedback review
- referral qualification and payout management
- Systeme webhook review and retry
- fresh setup links
- recent platform activity

Normal workspace owners and members should not see the Platform menu.

Platform workspace archive/delete is protected by a confirmation workflow. It archives the workspace data before removing the live workspace. Restore tools are available from the workspace archive list.

Source Resets

Use source resets carefully.

Current source reset options include:

- LifeWave source data
- systeme.io source data

A source reset is for cleaning up source-system linkage while keeping the LeadLight contact, notes, tasks, and activity history.

Use a source reset when a bad import needs cleanup but you do not want to lose CRM-owned work.

Current Limits

LeadLight is currently intended to:

- organize contacts
- keep follow-up work visible
- preserve task and activity history
- support safe imports with review
- manage workspace-specific email templates
- send a saved email template to selected contacts when configured
- manage reusable email campaigns and queue automated campaign sends with safeguards
- manage reusable workflow templates
- send individual workspace emails when configured
- check email wording against compliance guidance
- answer compensation and business-coaching questions from available context and imported data
- support referral tracking for LeadLight subscriptions

LeadLight is not currently intended to be:

- a high-volume marketing email platform
- a two-way live sync with LifeWave or systeme.io
- a replacement for LifeWave, systeme.io, Wise, or email account management
- a general file storage system
- a place to make unsupported product, income, or lifestyle claims

Safe Operating Habits

- Start with **Dashboard**.
- Use **Quick Add** when something needs to be captured quickly.
- Check **Admin > Review** after every import.
- Approve matches only when you are confident they are the same person.
- Review duplicates before merging.
- Use source resets instead of deleting history when an import goes wrong.
- Keep exported files private.
- Run compliance checks before sending or saving important email wording.
- Use placeholders in templates when wording should personalize per contact.
- Use email opt-out when a contact should not receive LeadLight emails.
- Preview selected-contact bulk emails before sending.
- Check **Admin > Campaign Sends** after applying automated email campaigns.
- Ask Comp Plan questions clearly and include the contact or metric you mean.