Flowbit

FLOWBIT · FOR OWNERS AND ADMINS

Admin and Settings

Set up and run the workspace: company profile, members and roles, plan and billing, automations, integrations, data, privacy and security.

Flowbit 2.0 October 2026 29 topics · 19 screens · 28 questions

Screens from the demo workspace "Vistaar WebX"

Who this is for

The workspace owner and admins. It covers everything under Settings that shapes the workspace for everyone: your company details, people and roles, products, plan and billing, automations, integrations, data and security.

> **GOOD TO KNOW**
> What you see depends on your role and your plan. If a page or button in this guide is missing for you, ask the owner or an admin of your workspace.

Contents

Part 1 · Your workspace 4
How Settings is laid out 4
General: workspace details 4
Company profile: letterhead and signatories 6
Members: invite, change role, disable 7
Roles and permissions 9
Modules: turn products on or off 11

Part 2 · Plan and billing 13
Plan & billing: plan, seats and trial 13
Bills and invoices: pay bills and autopay 15

Part 3 · Notifications and automations 16
Workspace notification defaults 16
Messages log 16
Automations 17
Build a new automation 19

Part 4 · Integrations 21
Integrations 21
Google Calendar and Meet 21
Connect Razorpay for invoice payments 22
Connected apps: Claude and ChatGPT 23
Slack 24
Webhooks 24
Email to task 24
Arc with real AI 25

Part 5 · Data, privacy and security 26
Import centre 26
Export all your data 27
Privacy and data requests 28
Compliance calendar 29
Audit log 30
Security: password, two-factor and sessions 31
Support access 32

Part 6 · Appearance and status 33
Appearance: colours, sounds and motion 33
Status page 34

Part 7 · Questions people ask 35

PART 1

Your workspace

Workspace details, company profile and signatories, members, roles and modules.

Settings is where the owner and admins set up the workspace: people and roles, products, plan and billing, notifications, automations, integrations, payments and data. It also holds the personal settings every user has: profile, alerts, briefs, password and appearance. Open it from **Rail** → **Settings**.

How Settings is laid out

The Settings side panel has six groups.

- **You** is for everyone and changes only your own login: **My account (login)**, **Security**, **Appearance**, **My alerts**, **Briefs**, **Google** and **Connected apps**.
- The other groups change things for everyone, so most of them are open only to the owner and admins (or to a custom role given the right permission): **Company** (**General**, **Company profile**, **Domains**, **Privacy**), **People and access** (**Members**, **Roles**, **Support access**, **Audit log**), **Plan** (**Plan & billing**), **Automation and messages** (**Workspace alerts**, **Automations**, **Compliance calendar**, **Messages log**) and **Data** (**Import**, **Export**, **Integrations**, **Modules**).

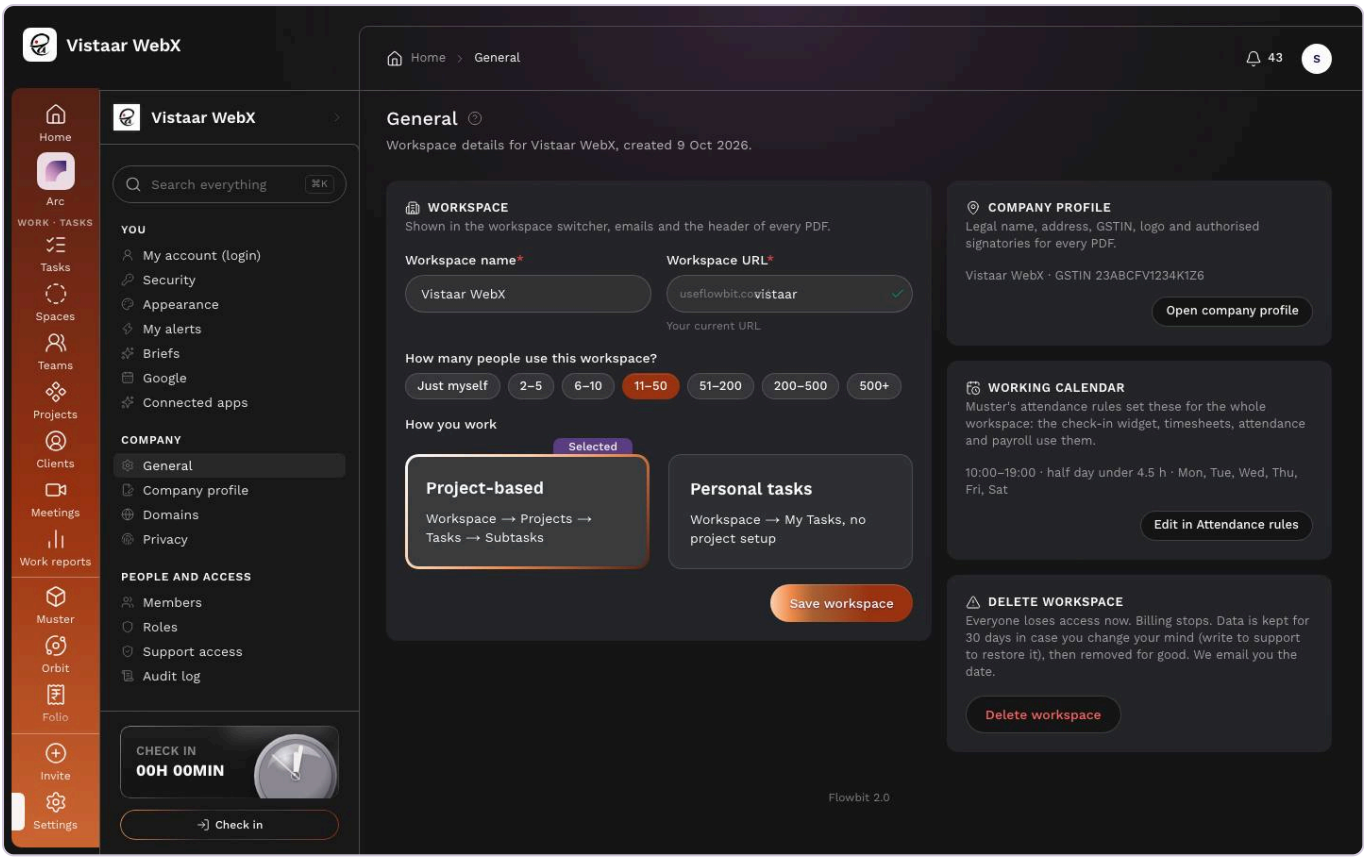
GOOD TO KNOW

The owner can do everything. An admin can do everything except manage the subscription and delete the workspace. There is always exactly one owner; ownership can be handed over from **Members**.

General: workspace details

Open: **Rail** → **Settings** → **General** `/app/settings` Who: owner, admin

The workspace name and URL, and the working hours that attendance and payroll use. The company's legal details, logo and signatories live in Company profile.



The Settings side panel on the left; the workspace name, URL, team size and logo on the right.

ON THIS PAGE

- **Workspace** — **Workspace name** (shown in the workspace switcher, emails and the header of every PDF), **Workspace URL**, **How many people use this workspace?** and **How you work**: **Project-based** (Workspace → Projects → Tasks → Subtasks) or **Personal tasks** (My Tasks, no project setup).
- **Company profile** — the legal name and GSTIN, with **Open company profile** to change them, the address, the logo and the signatories.
- **Working calendar** — **Day starts**, **Day ends**, **Half day (hours)** and **Working days**. The time zone is fixed to Asia/Kolkata (IST).
- **Delete workspace** — at the bottom of the page, owner only.

SET OFFICE HOURS AND WORKING DAYS

1. Set **Day starts** and **Day ends**, for example 10:00 AM to 07:00 PM.
2. Set **Half day (hours)**, for example 4.5.
3. Tick the **Working days**. Untick Sunday (and Saturday if you work five days).
4. Click **Save hours**.

> **GOOD TO KNOW**
> The check-in widget, attendance and the number of working days in payroll all follow this calendar. Change it before you run a month's payroll, not in the middle.

DELETE THE WORKSPACE

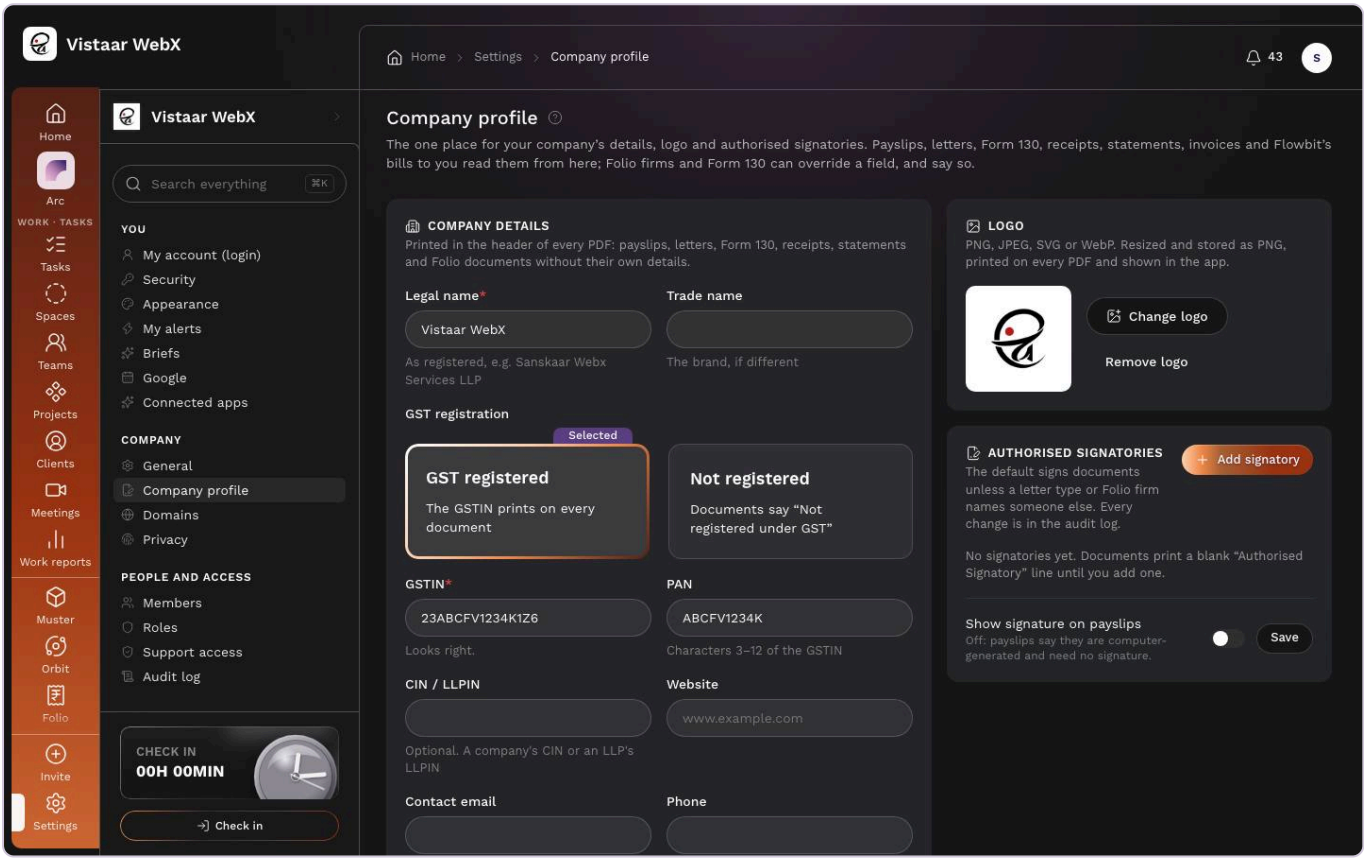
Only the owner can do this. Everyone loses access at once and billing stops. Flowbit emails you the date: the data is kept for 30 days in case you change your mind (write to support to restore it), you get a reminder 7 days before, and then it is removed for good. Flowbit's own invoices to you are kept, as the law requires.

> **CAREFUL**
> Take a full export from **Export** before you click **Delete workspace**. After 30 days the data cannot be brought back.

Company profile: letterhead and signatories

Open: **Rail → Settings → Company profile** `/app/settings/company` Who: owner, admin

What every PDF prints at the top and at the bottom: payslips, HR letters, Form 130 Part B, receipts, statements, and Folio invoices, quotes and credit notes. PDFs use the same brand colours as the app (Settings → Appearance), darkened a little where a light colour would be hard to read on paper.



Company details on the left; logo and authorised signatories on the right.

ON THIS PAGE

- **Company details** — **Legal name**, **Trade name**, **GST registration** (**GST registered** with the **GSTIN**, or **Not registered**), **PAN**, **CIN / LLPIN**, **Website**, **Contact email**, **Phone** and the full address. The GSTIN must match the state of the address.
- **Logo** — PNG, JPEG, SVG or WebP. Flowbit turns it into a resized PNG before it uploads.
- **Authorised signatories** — each with a name, designation, signature image and an optional seal or stamp. One of them is the **Default**.
- **Show signature on payslips** — off by default; payslips then say they are computer-generated and need no signature.

ADD AN AUTHORISED SIGNATORY

1. Under **Authorised signatories**, click **Add signatory**.
2. Type the **Name** and **Designation**.
3. Click **Choose signature** and pick a photo or scan of the signature on white paper (PNG or JPEG).

4. Leave **Remove background** on to make the paper transparent. Move the slider if faint ink disappears or a grey patch stays.
5. Optionally add a **Seal or stamp** the same way.
6. Click **Add signatory**.

> **GOOD TO KNOW**
> Only owners and admins can add, change or remove signatories, and every change is in the audit log. Signature and seal images are stored privately: they are only ever drawn into PDFs and cannot be opened or downloaded as files.

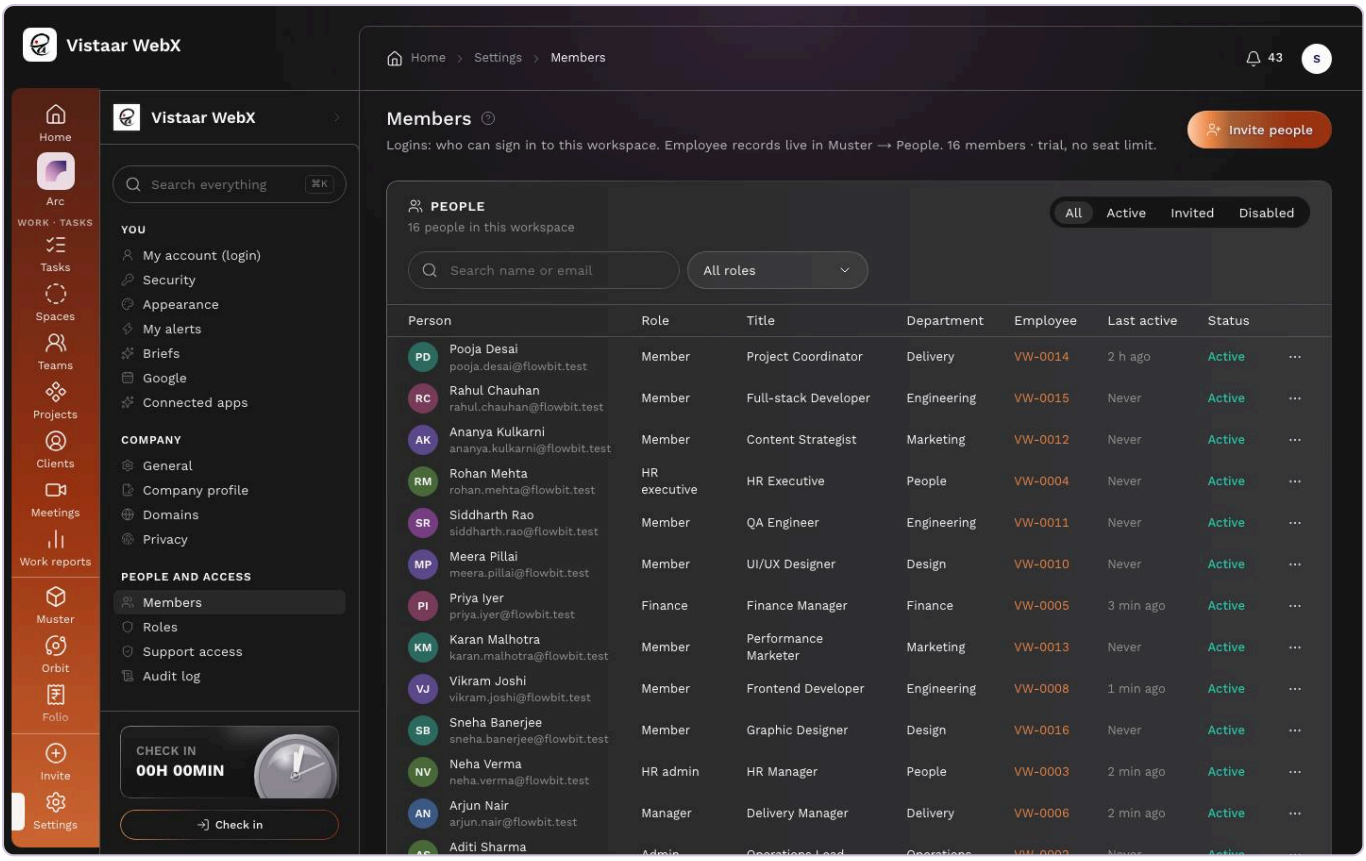
WHO SIGNS WHAT

- **HR letters** — the signatory set for that letter type in **HR settings** → **Letter signatories**, else the default. On a draft, **Signed by** picks another signatory or **Someone else** (a typed name, no signature image). The signature is fixed on the letter when it is issued, so a reprint looks the same.
- **Form 130 Part B** — the person in the tax-year settings. When that is an authorised signatory, their signature prints; left blank, the default signs.
- **Folio documents** — the firm's own signatory when it has one, else the default. A firm that leaves its logo, email, phone or website blank uses the company profile's ("Using company profile" in the firm form).
- **Receipts and statements** — as Folio documents.
- **Flowbit's own bills** (Settings → Plan & billing) — always Flowbit's details, because Flowbit issues them.

Members: invite, change role, disable

Open: **Rail** → **Settings** → **Members** `/app/settings/members` Who: owner, admin

Everyone who can sign in to the workspace, with their role and status. This is where you invite people, change what they can do, and cut off access when someone leaves.



The line under the heading shows how many members you have and your seat limit.

ON THIS PAGE

- Filters: **All**, **Active**, **Invited**, **Disabled**, plus **Search name or email** and **Filter by role**.
- Columns: **Person**, **Role**, **Title**, **Department**, **Employee** (links to the HR record), **Last active**, **Status**, and an actions menu at the end of each row.

INVITE PEOPLE

1. Click **Invite people**.
2. If the person already has an HR record, pick it in **Link to an employee record**. This fills the email and connects their self-service.
3. Type one or more addresses in **Emails**, separated by commas, spaces or new lines. Up to 20 at a time.
4. Pick a **Role** (Member by default) and, if you like, a **Job title**.
5. Click **Send invitations**. Each person gets an email with a link to join. The link works for 7 days.

> **TIP**
> If email delivery is not set up yet, invitations are saved instead of sent. You can copy each invite link and share it yourself. To invite many people from a spreadsheet, use **Import → Team members**.

Pending invites appear under **Invited**. Use **Resend** to send the email again, or **Revoke** to cancel it: the link stops working and the seat is freed.

CHANGE SOMEONE'S ROLE

1. Open the row's actions menu (for example **Actions for Vikram Joshi**).
2. Choose **Change role**.
3. Pick the new role and save. It applies on their next request.

Edit details in the same menu changes title and department. When the member is linked to an employee record, department and manager are managed in **HR** → **People** instead.

DISABLE SOMEONE WHO HAS LEFT

1. Open the row's actions menu and choose **Disable**.
2. Confirm with **Disable**. They are signed out at once and cannot sign back in. Their tasks, records and history stay, and the seat is freed.
3. To bring them back, open the menu on the **Disabled** list and choose **Enable**. This uses a seat again.

> **GOOD TO KNOW**
> Flowbit does not delete members. Disabling keeps the audit trail intact, which matters for approvals and payroll history. To finish an exit in HR (last day, settlement), use the employee's record in Muster.

HAND OVER OWNERSHIP

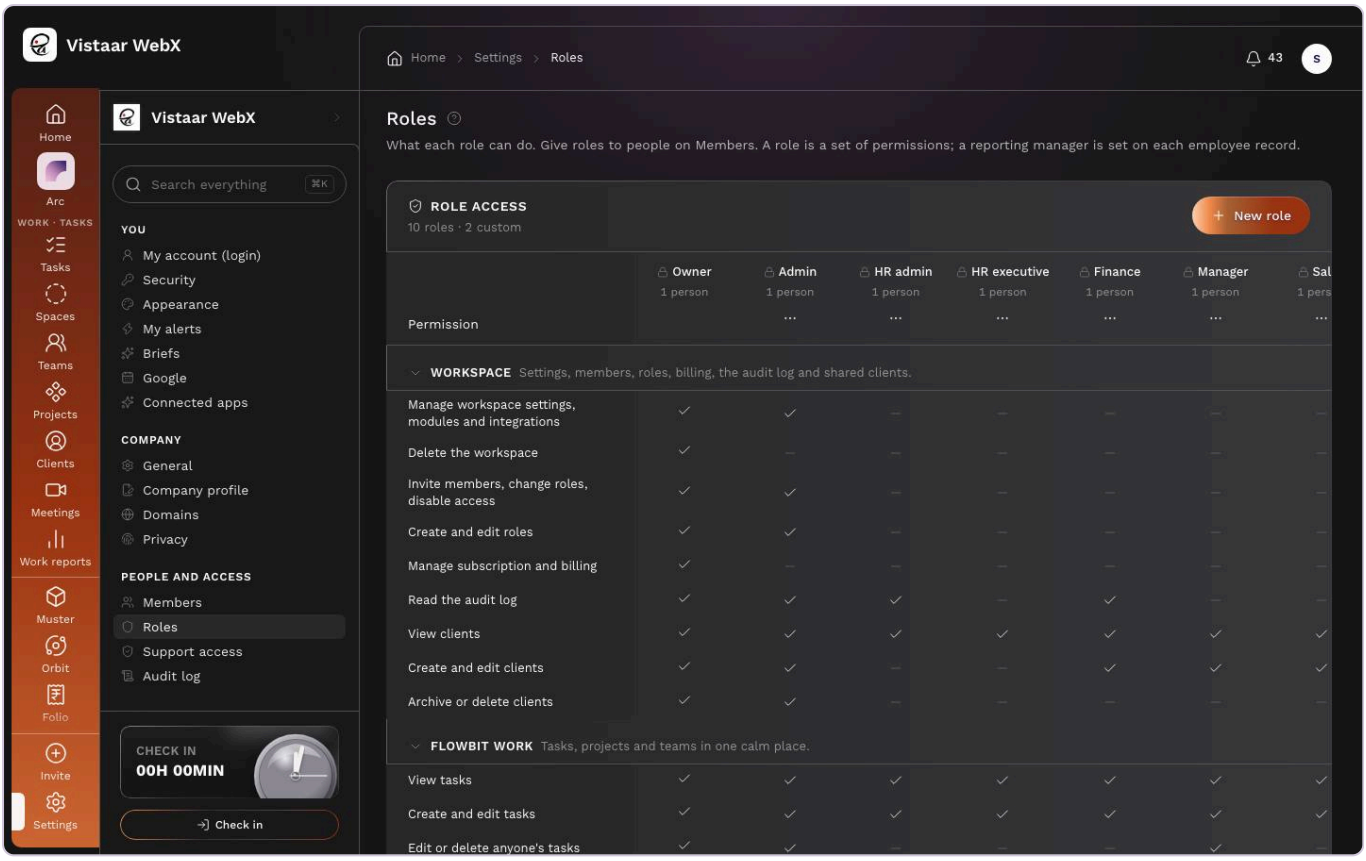
1. As the owner, open the new owner's actions menu and choose **Transfer ownership**.
2. Type the workspace name to confirm, then click **Transfer ownership**.

> **CAREFUL**
> The new owner gets the subscription and the right to delete the workspace. You become an admin, and cannot undo this yourself.

Roles and permissions

Open: **Rail** → **Settings** → **Roles** `/app/settings/roles` Who: owner, admin

What each role can do. Flowbit comes with eight built-in roles. You can add your own custom roles, for example a "BD executive" who also sees Orbit reports. You give roles to people on **Members**.



Each column is a role with its head count; each row is one permission, grouped by product.

THE BUILT-IN ROLES

ROLE	WHAT IT CAN DO
Owner	Everything, including the subscription and deleting the workspace. One per workspace.
Admin	Everything except the subscription and deleting the workspace.
HR admin	All of Muster: people, attendance, leave, claims, payroll run and approval, letters. Can read the audit log.
HR executive	People, attendance, leave, claims and letters. Does not see salaries, payslips or payroll, and no sensitive IDs (PAN, Aadhaar, bank).
Finance	Payroll approval and release, claim payouts, all of Folio and reports. Can read sensitive IDs and the audit log.
Manager	All of Work, approvals (leave, attendance, timesheets) for direct reports, and read access to Orbit.
Sales	All of Orbit, client records and Folio quotes.
Member	Their own tasks and self-service: attendance, leave, claims and payslips.

KEY PERMISSIONS AT A GLANCE

PERMISSION	OWNER	ADMIN	HR ADMIN	HR EXEC	FINANCE	MANAGER	SALES	MEMBER
Manage workspace settings, modules and integrations	Yes	Yes	No	No	No	No	No	No
Invite members, change roles, disable access	Yes	Yes	No	No	No	No	No	No
Create and edit roles	Yes	Yes	No	No	No	No	No	No

PERMISSION	OWNER	ADMIN	HR ADMIN	HR EXEC	FINANCE	MANAGER	SALES	MEMBER
Manage subscription and billing	Yes	No	No	No	No	No	No	No
Delete the workspace	Yes	No	No	No	No	No	No	No
Read the audit log	Yes	Yes	Yes	No	Yes	No	No	No
Create and edit tasks	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Approve timesheets	Yes	Yes	No	No	No	Yes	No	No
Approve leave	Yes	Yes	Yes	Yes	No	Yes	No	No
See PAN, UAN, ESIC, Aadhaar and bank details	Yes	Yes	Yes	No	Yes	No	No	No
Approve payroll (finance)	Yes	Yes	Yes	No	Yes	No	No	No
Release payroll and publish payslips	Yes	Yes	Yes	No	Yes	No	No	No
Open Orbit; see own leads, deals and activities	Yes	Yes	No	No	Yes	Yes	Yes	No
Issue invoices and email them	Yes	Yes	No	No	Yes	No	No	No
View clients	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

The full matrix on the page lists every permission, in five groups: **Workspace**, **Flowbit Work**, **Muster**, **Orbit** and **Folio**. Click a group name to fold it.

CREATE A CUSTOM ROLE

1. Click **New role**. Or, to start from an existing role, open its column menu and choose **Duplicate to customise** (built-in roles) or **Duplicate** (custom roles).
2. Give it a name and a short description.
3. Tick the permissions people with this role should have.
4. Save. The new role now appears in the **Role** list on **Members**.

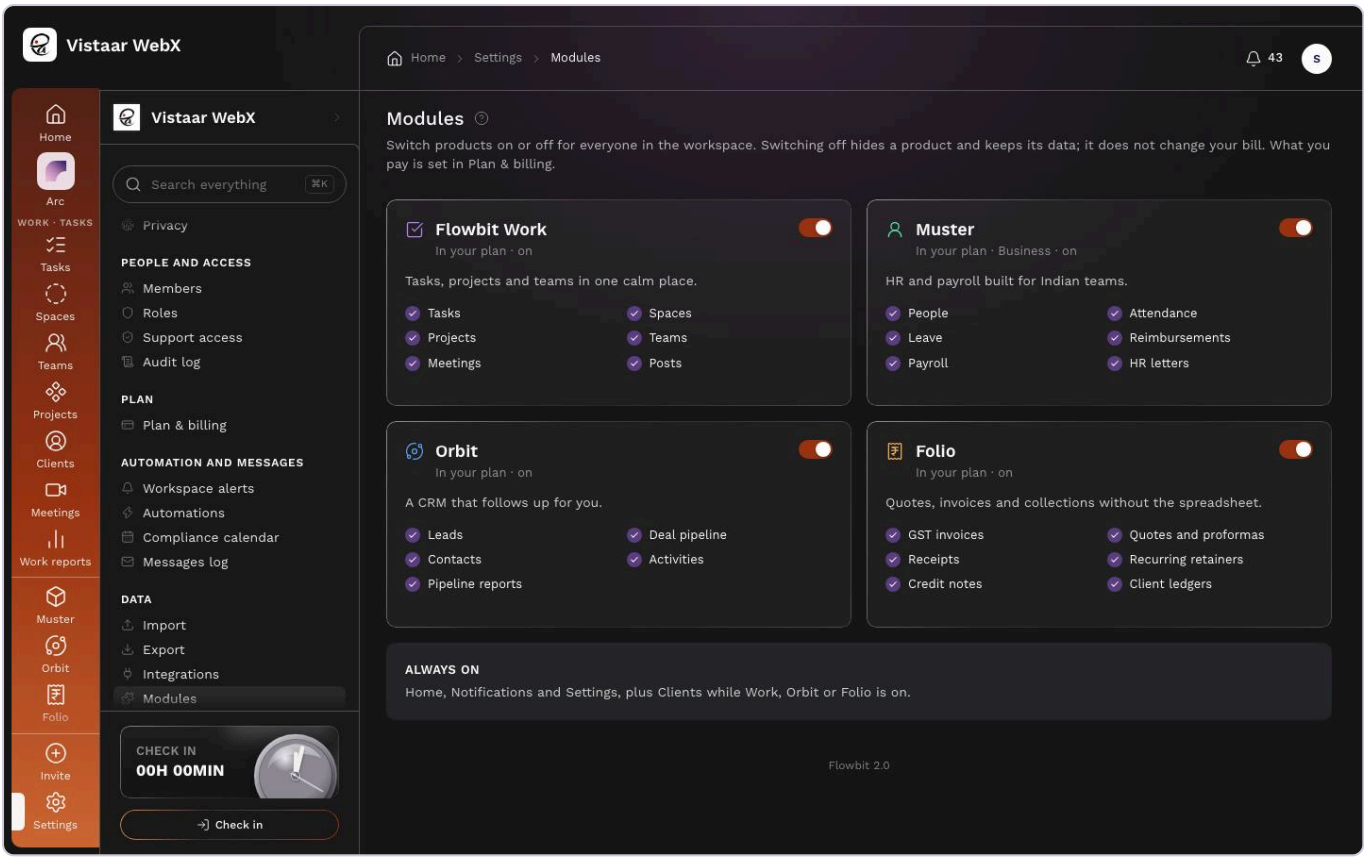
To change a custom role later, open its column menu and choose **Edit**, or tick and untick cells in its column and save. **Delete** removes a custom role.

> **GOOD TO KNOW**
> Built-in roles cannot be edited; duplicate them instead. You can only grant permissions you hold yourself, so an admin cannot create a role that manages the subscription.

Modules: turn products on or off

Open: **Rail** → **Settings** → **Modules** `/app/settings/modules` Who: owner, admin

Switch whole products on or off for everyone in the workspace. A team that does not do HR in Flowbit, for example, can hide Muster.



Each card says whether the product is in your plan and whether it is on.

- **Flowbit Work** — tasks, spaces, projects, teams, meetings and posts.
- **Muster** — people, attendance, leave, reimbursements, payroll and HR letters. The card shows your Muster tier (Starter or Business).
- **Orbit** — leads, deal pipeline, contacts, activities and pipeline reports.
- **Folio** — GST invoices, quotes and proformas, receipts, recurring retainers, credit notes and client ledgers.
- **Always on** — Home, Notifications and Settings, plus Clients while Work, Orbit or Folio is on.

SWITCH A PRODUCT OFF

1. Find the product card, for example **Orbit**.
2. Turn off its switch (**Orbit on or off**). It leaves the rail for everyone.
3. Turn it on again whenever you need it.

> **GOOD TO KNOW**
> Switching a product off never deletes its data. It also does not change your bill: to stop paying for a product, change your plan on **Plan & billing**.

PART 2

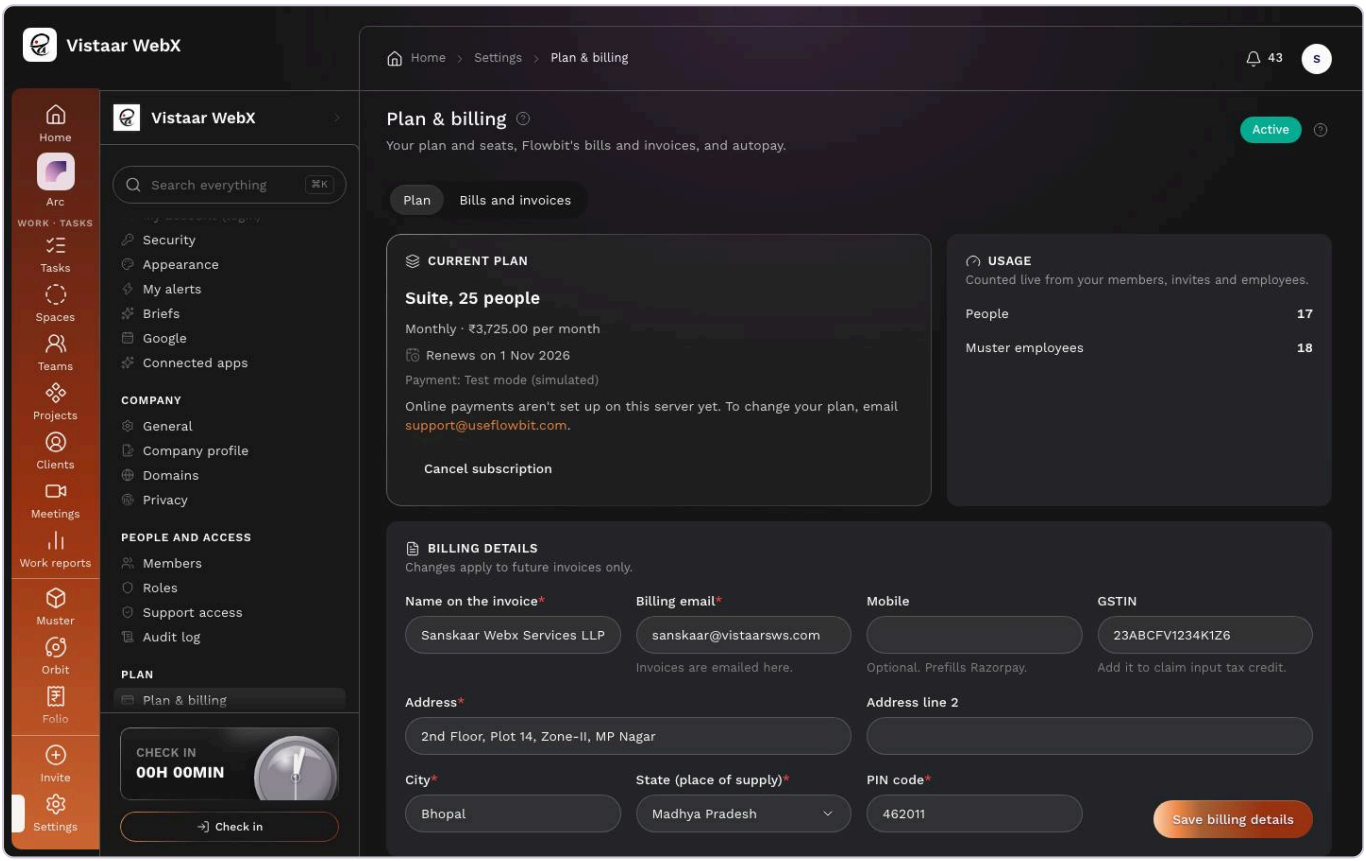
Plan and billing

Your subscription, seats, the trial and paying Flowbit.

Plan & billing: plan, seats and trial

Open: **Rail → Settings → Plan & billing** `/app/settings/subscription` Who: owner

Your Flowbit plan, how many seats you use, the details printed on Flowbit's GST invoices to you, and your billing history.



The plan card shows the plan, the seat count, the price before GST and the renewal date.

ON THIS PAGE

- **Current plan** — plan name, seats, billing cycle, price per month plus GST, renewal date and payment method. **Cancel subscription** sits here.
- **Usage** — counted live from your members, invites and employees: **People** and **Muster employees**.
- **Billing details** — **Name on the invoice**, **Billing email** (invoices are emailed here), **Mobile**, **GSTIN**, address and **State (place of supply)**.
- **Billing history** — every GST invoice Flowbit issued to you, with **Number**, **Date**, **Period**, **Amount**, **Payment**, **Status**, a **PDF** link and **Email again**.

HOW PLANS WORK

STAGE	RULE
Free	Up to 5 people, all four products, free for 6 months from signup. Adding a 6th person asks you to upgrade, or to start the trial if your business has not had it. Extra Folio firms and paid add-ons (client portal, custom domains, Meetings AI) are not included. One Free workspace per business.

STAGE	RULE
Trial	For teams of more than 5: 15 days with all features and all people. One trial per business (GSTIN, else PAN, else the owner's email). After it, pay, or trim to 5 people and go back to Free for the rest of the 6 months from signup.
Paid	Monthly or yearly billing. Monthly pays the list price. Yearly costs 10 months' price (2 months free). Your first yearly plan is also 50% off for its first year (a separate discount line on the invoice, with GST on the discounted amount); yearly renewals pay 10 months' price. The price shown when you upgrade is the one you pay.
Seats	Free: the higher of people who sign in and employees on payroll. Suite: everyone who signs in plus employees on payroll who do not sign in, so each person counts once. Separate products are each counted on their own: Work counts people who sign in, Muster counts employees on payroll, Orbit counts people whose role can work leads or deals. Pending invites count as people who sign in. An employee who only uses self-service (attendance, leave) counts as an employee, not a login.
Folio users	Folio on its own includes 3 users, and the limit cannot be raised. Anyone whose role has any Folio permission counts, even to view or quote: by default the Owner, Admins, Finance and Sales. For more than 3, choose Suite.

LIST PRICES (PER MONTH, BEFORE 18% GST)

PLAN	PRICE	MINIMUM
Suite (Work, Muster Business, Orbit and Folio)	₹149 per person	10 people
Work	₹59 per user	5 users
Muster Starter (no payroll)	₹39 per employee	10 employees
Muster Business (with payroll, PF, ESI and PT)	₹79 per employee	10 employees
Orbit	₹149 per sales user	2 sales users
Folio	₹399 flat per workspace (2 firms and 3 users included; ₹199 per extra firm)	—

Prices can change; the price shown when you upgrade is the one you pay. For example, Suite for 25 people monthly is 25 × ₹149 = ₹3,725 a month (plus 18% GST once Flowbit is GST-registered: ₹4,396 a month after rounding).

UPGRADE OR START A TRIAL

1. When you reach the Free limit, a panel offers **Upgrade**, and **Start 15-day trial** only while your business has not had its trial. When a trial ends, a workspace trimmed to 5 people within the 6 months from signup also sees **Stay on Free (5 people)**. When the free months end, only **Upgrade** is left. There is no separate trial of a single product: a product your plan does not include shows **Add to plan**.
2. Click **Upgrade**, choose the products, the number of people and monthly or yearly.
3. Pay by UPI, card or net banking. Flowbit emails the invoice to your billing email (a GST tax invoice once Flowbit is GST-registered; until then it says it is not a tax invoice), and it appears in **Billing history**.

GOOD TO KNOW

Only the owner can upgrade. Others see "Ask your workspace owner to upgrade the plan or start a trial." If online payments are not switched on for your account, the page tells you to email **support@useflowbit.com** to change your plan.

FILL IN YOUR BILLING DETAILS

1. Under **Billing details**, enter the **Name on the invoice** and **Billing email**.
2. Add your **GSTIN** to claim input tax credit on Flowbit's invoices.
3. Fill the address and pick the **State (place of supply)**.
4. Click **Save billing details**. Changes apply to future invoices only.

CAREFUL

If your plan ends without payment, the workspace becomes read-only for 30 days. **Export data** always works, without a watermark, and employees can still download old payslips. A missed renewal payment keeps full access for 7 days first. A monthly downgrade applies from the next cycle; yearly plans are not refunded.

Bills and invoices: pay bills and autopay

Open: **Rail** → **Settings** → **Plan & billing** → **Bills and invoices** `/app/settings/subscription?tab=bills` Who: owner

Bills to pay, Flowbit's invoices and receipts, autopay and bank transfers.

TIP

The screenshot of this page is being retaken. Due bills on top, autopay status in the middle, paid invoices below.

PAY A DUE BILL

1. Under **Due bills**, find the bill.
2. Pay online, or pay by bank transfer or UPI and then send the UTR (the bank's reference number) from the same card.
3. When the payment arrives, the invoice is issued and listed under **Invoices and receipts** (a GST tax invoice once Flowbit is GST-registered).

TURN ON AUTOPAY

1. Under **Autopay**, click **Set up autopay**.
2. Approve a UPI Autopay or e-mandate in your bank or UPI app.
3. The **Status** changes from Off. Your plan now renews by itself, with a notice 24 hours before every debit.

Download any invoice from the **PDF** link in the **Invoices and receipts** table.

PART 3

Notifications and automations

Workspace alerts, the messages log and automations.

Workspace notification defaults

Open: **Rail** → **Settings** → **Workspace alerts** (Automation and messages group) `/app/settings/notifications`

Who: owner, admin

What the workspace sends by default, and on which channel. Each person can still change their own on **My alerts**; switches they have not touched follow these defaults.

> **TIP**
> The screenshot of this page is being retaken. The same alert list as My alerts, but these are the defaults for everyone.

CHANGE A DEFAULT

1. Under **Workspace defaults**, find the alert, for example **Leads and deals**.
2. Turn its **In-app** or **Email** switch on or off. Alerts always land in the bell unless you switch In-app off.

SET QUIET HOURS

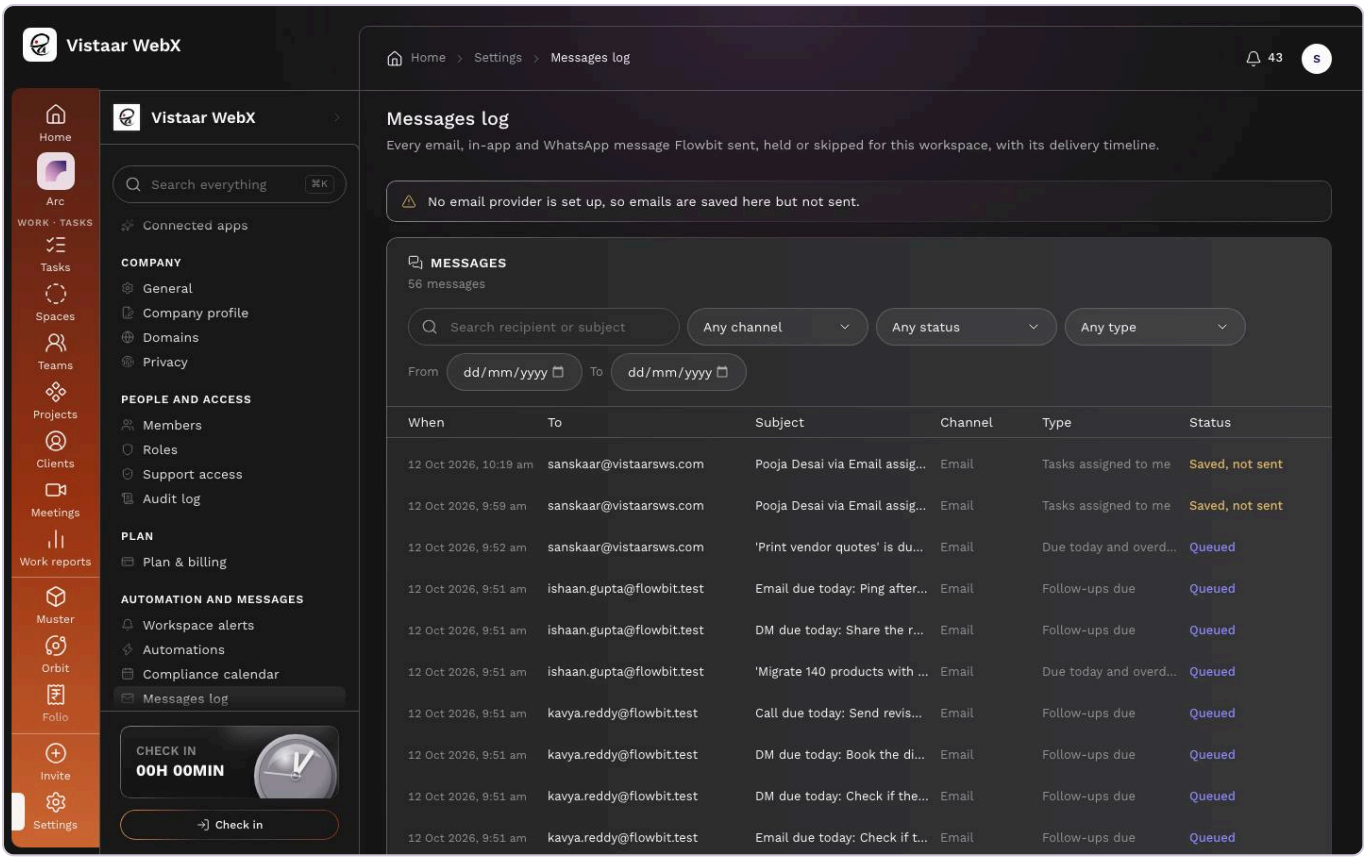
1. Under **Quiet hours**, set **From** and **Until**, for example 21:00 to 08:00 IST.
2. Click **Save quiet hours**. Alert emails that arrive in these hours wait and go out together when they end.

> **GOOD TO KNOW**
> Security emails always go at once. Rows marked "Fixed by Flowbit" cannot be changed.

Messages log

Open: **Rail** → **Settings** → **Messages log** `/app/settings/messages` Who: owner, admin

Every email and in-app message Flowbit sent, held or skipped for this workspace, with its delivery timeline. Look here when someone says "I never got the invite" or a client says a reminder did not arrive.



Each row shows when, to whom, the subject, the channel, the type of message and its status.

ON THIS PAGE

- Filters: **Search recipient or subject**, **Channel**, **Status**, **Type**, and **From** and **To** dates.
- Statuses you will see include **Queued** (waiting to go, for example during quiet hours), **Saved, not sent** (no email provider set up yet) and **Failed**.

CHECK AND RESEND A MESSAGE

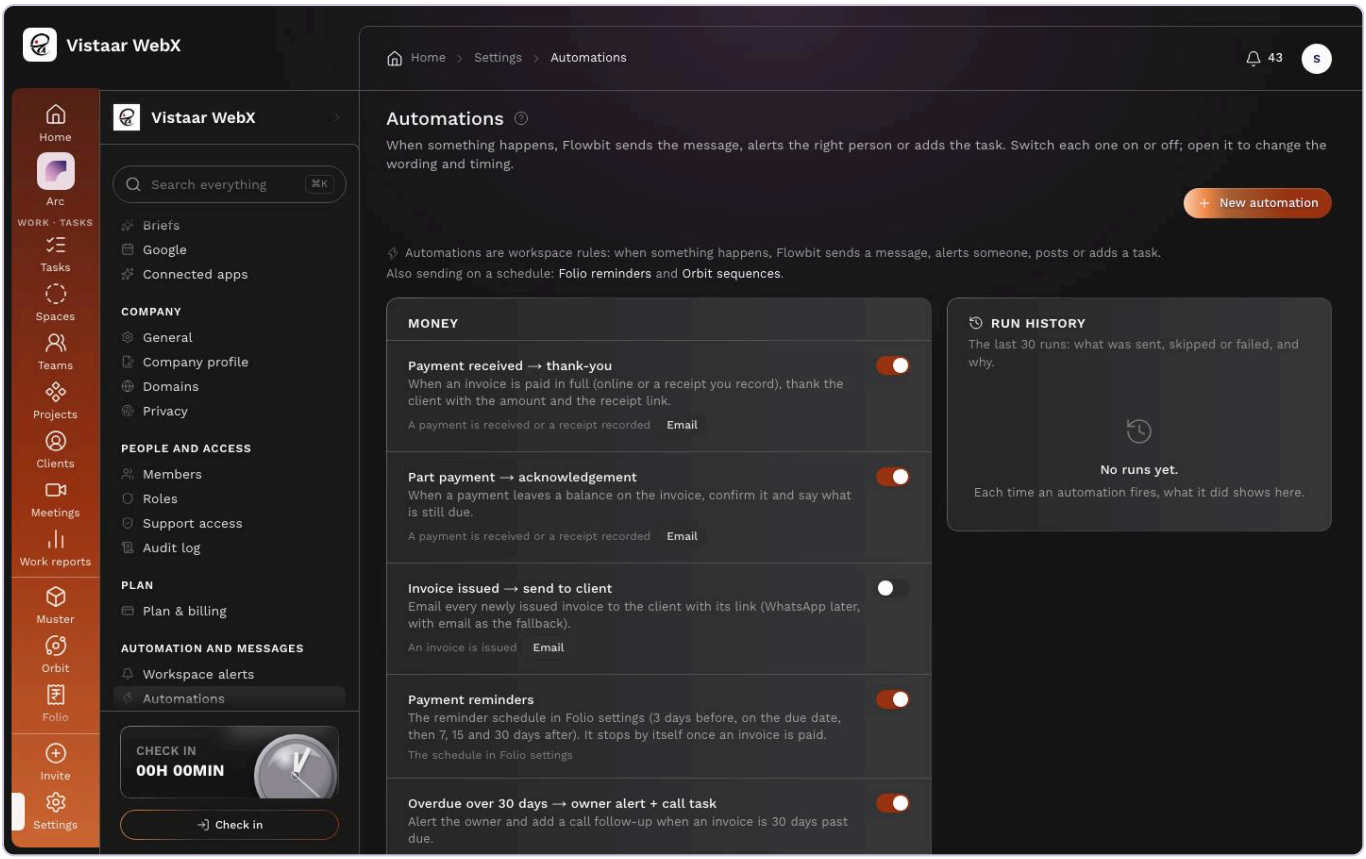
1. Search for the recipient's email, or filter by **Type** (for example Invite or Reminder).
2. Click the row. The panel shows the **Message**, an **Email preview** or **Plain text**, the **Timeline** of delivery events, **Attempts**, **Next try** and, if it was skipped, **Why it was skipped**.
3. Click **Send again** to resend it.

> **GOOD TO KNOW**
> If the page warns that no email provider is set up, emails are kept here but not delivered. Copy invite links from **Members** in the meantime. Message and delivery logs are kept for 13 months, then deleted.

Automations

Open: **Rail** → **Settings** → **Automations** `/app/settings/automations` Who: owner, admin

Rules that act for you: when something happens, Flowbit sends the message, alerts the right person or adds a task. Flowbit comes with a ready set; switch each one on or off, and open it to change the wording and timing.



Under each name, the grey line shows the trigger and the channels it uses.

THE READY-MADE AUTOMATIONS

GROUP	EXAMPLES
Money	Payment received → thank-you; Part payment → acknowledgement; Invoice issued → send to client; Overdue over 30 days → owner alert + call task; Quote not accepted in 3 days → follow-up; Quote expiring in 2 days → reminder; Quote accepted → owner + convert task; Recurring invoice drafted → review; Monthly statement on the 1st; Client shares a UTR → verify task. Payment reminders link to the schedule in Folio settings.
Team	Task overdue 3 days → manager; Leave pending 24 hours → reminder; Leave pending 48 hours → escalate (timed from the request's current stage); Meeting in 15 minutes → attendees
Sales	New lead → alert the assignee + welcome the lead; Lead not contacted in 2 hours → nudge; Lead not contacted in 24 hours → sales manager; Deal idle for 7 days → nudge; Deal won → team post + owner alert
People	Attendance not marked by 10:30 → nudge; Forgot to check out → evening nudge; Birthday and work anniversary wishes; New joiner → welcome before Day 1; Joining documents incomplete → weekly reminder; Probation ending in 15 days; ID, contract or visa expiring in 30 days; Payslip published → "your payslip is ready" note
Business compliance	Statutory due date in 3 days → owner and accounts (from your **Compliance calendar**)

EDIT A READY-MADE AUTOMATION

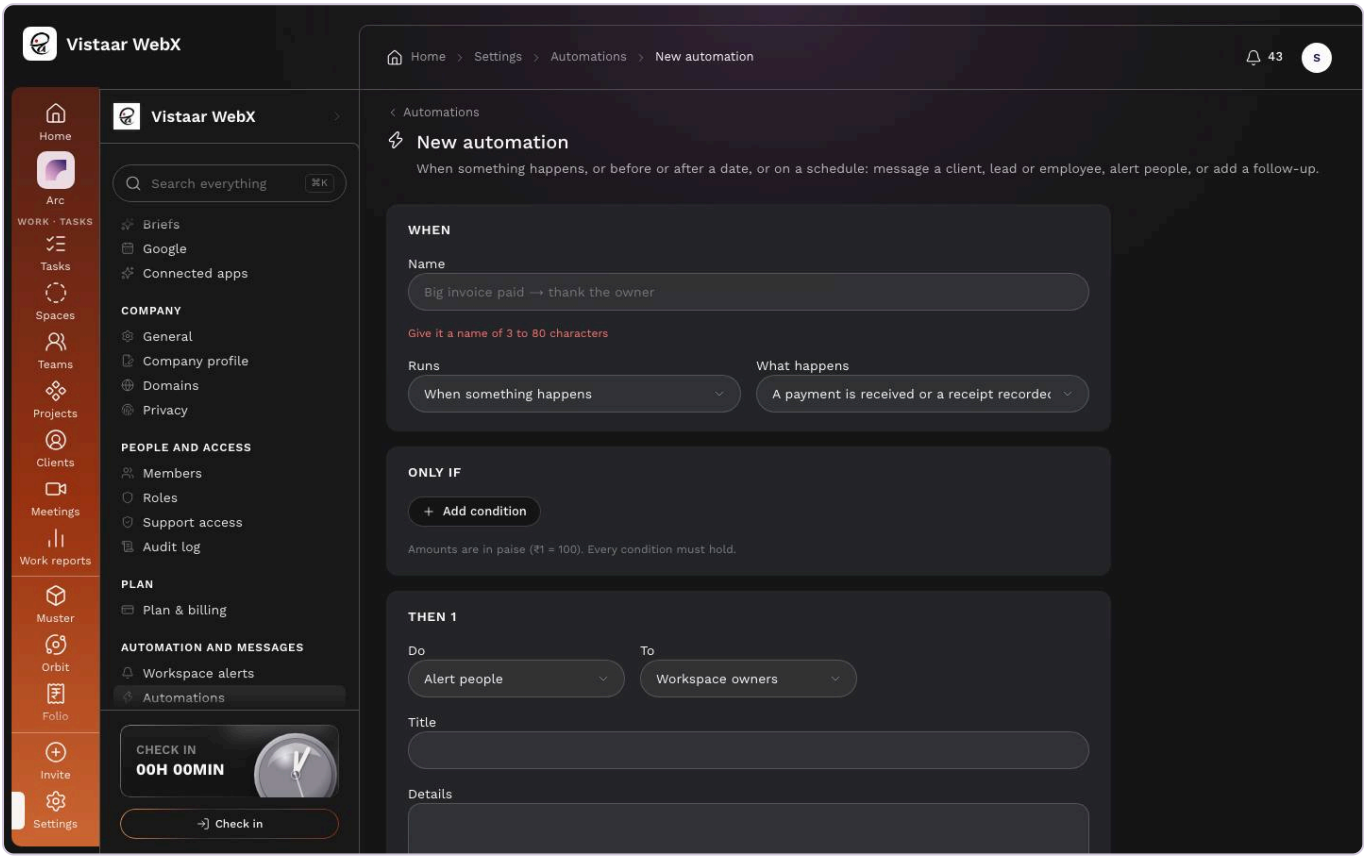
1. Click its name, for example **Payment received → thank-you**.
2. Change the wording, the conditions or the timing.
3. Click **Test on me** to receive the saved version yourself, filled with sample values.
4. Save, and turn on its switch on the list. **Delete** removes an automation you no longer need.

Run history at the bottom of the list shows the last 30 runs: what was sent, skipped or failed, and why.

Build a new automation

Open: **Automations** → **New automation** `/app/settings/automations/new` Who: owner, admin

Every automation has three parts: **When** (the trigger), **Only if** (conditions) and **Then** (one or more actions), plus timing and safety limits.



Read it top to bottom as a sentence: when this happens, only if that holds, then do this.

CREATE ONE

1. Click **New automation** and give it a **Name** of 3 to 80 characters, for example "Big invoice paid → thank the owner".
2. Under **When**, pick how it **Runs**: **When something happens**, **Before or after a date**, or **On a schedule** (**Every day**, **Every week** or **Every month**).
3. Pick **What happens**, for example **A payment is received or a receipt recorded**, **An invoice is issued**, **A client accepts a quote online**, **A new lead arrives (form, webhook, IndiaMART)**, **A deal is won** or **A payslip is published**.
4. Under **Only if**, click **Add condition** to narrow it: pick a field, a comparison and a **Value**. Every condition must hold. Amounts are in paise, so ₹50,000 is 5000000.
5. Under **Then 1**, choose what to **Do**: **Alert people**, **Send a message** or **Add a follow-up task**. Choose **To** whom, and write the **Title** and **Details**.
6. Insert values such as `{{client_name}}`, `{{amount}}` or `{{invoice_number}}`; the list under the box shows the ones this trigger offers.
7. Click **Add a step** for a second action, for example an alert and a task.

8. Under **Timing and safety**, set **Wait before running (minutes)**, the most automated messages per contact a day (3 by default; 0 = no limit), and tick **Only during business hours** (Monday to Saturday, 10 am to 7 pm IST, the default office hours) if it messages clients.
9. Tick **Switch it on now** and click **Save automation**.

> **TIP**
> Keep the daily limit on for messages to clients, so a client never gets a flood of them. Messages from your own WhatsApp Business number are coming soon.

PART 4

Integrations

Google, Razorpay, Claude and ChatGPT, Slack, webhooks, email to task and Arc.

Integrations

Open: **Rail** → **Settings** → **Integrations** `/app/settings/integrations` Who: owner, admin

The outside services Flowbit connects to, and whether each one is working. Nothing secret is shown here.

> **TIP**
> The screenshot of this page is being retaken. Each card shows a status such as Not configured, Not connected or Test mode.

- **Google sign-in** — how many members sign in with Google, and the two addresses to register with Google: one for sign-in, one for Calendar and Gmail connections.
- **Email delivery** — sent, saved-not-sent and failed emails in the last 30 days, with a link to **Open the Messages log**. If it is not configured, emails are saved in the log instead of being sent.
- **Flowbit subscription payments** — how you pay Flowbit.
- **Your Razorpay (invoice payments)** — **Connect Razorpay** to add "Pay now" links to your invoices.
- **File storage** — how many files the workspace stores and their size.
- **Arc (AI)** — whether Claude is connected, and this month's AI requests against your plan's allowance. Arc reads and suggests. Nothing changes until someone clicks Apply.

APPS AND CONNECTORS

Cards at the top of the page open the connectors you set up yourself:

- Connected apps (also in the Settings menu) — let Claude or ChatGPT read and update Flowbit for you.
- Slack — turn Slack messages into tasks with `/flowbit`.
- Webhooks — send Flowbit events to Zapier, Make or your own server.
- Email to task — forward an email to make a task.

Each member connects their own Google Calendar and Gmail under **Settings** → **Google**; see Google Calendar and Meet.

Google Calendar and Meet

Open: **Settings** → **Google** (You group) `/app/settings/integrations/google`

Who: everyone, each for their own account

Connect your own Google Calendar and the meetings you schedule in Work go on it, with a Google Meet link added for you. Moving or cancelling the meeting in Flowbit moves or cancels it in Google. Your own upcoming Google events also show, greyed and read-only, on the Meetings calendar so you can see when you are free.

1. Open **Settings** → **Google** and click **Connect Google Calendar**.
2. Choose your Google account and allow access to calendar events.

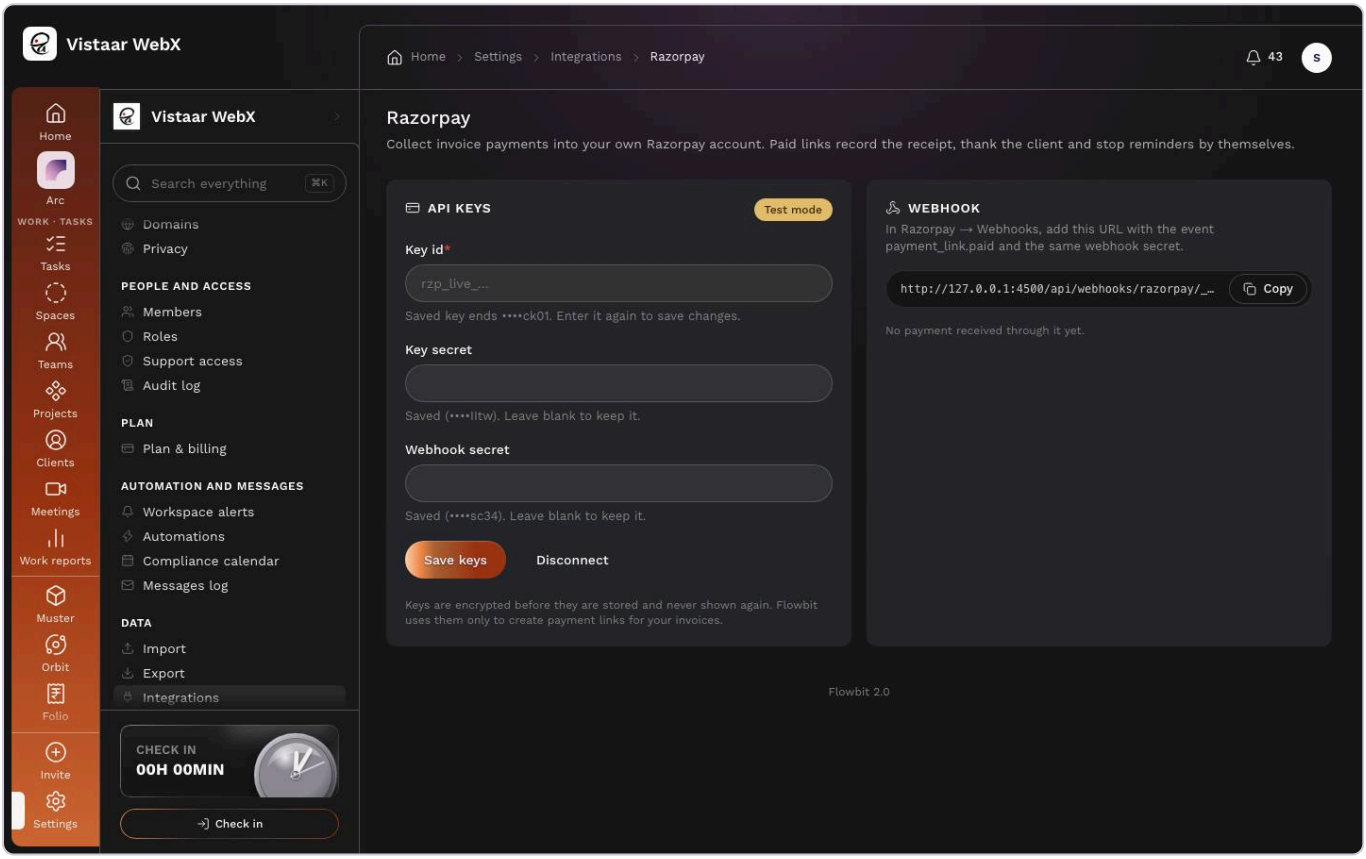
3. Schedule a meeting without a link of its own. Its page now shows the Meet link and "On the organiser's calendar".

> **GOOD TO KNOW**
> Flowbit asks only for calendar events, never your email or contacts. Click **Disconnect** at any time to withdraw access. Attendees still get Flowbit's own invite email with a calendar file.

Connect Razorpay for invoice payments

Open: **Settings** → **Integrations** → **Connect Razorpay** `/app/settings/integrations/razorpay` Who: owner, admin

Collect invoice payments straight into your own Razorpay account. When a client pays through the link, Flowbit records the receipt, thanks the client and stops reminders by itself.



Your webhook URL appears under Webhook once the keys are saved.

CONNECT IT

1. In the Razorpay Dashboard, open **Account & Settings** → **API keys** and generate a key. It starts with `rzp_live_` (or `rzp_test_` for testing).
2. In Flowbit, paste the **Key id** and **Key secret**.
3. Make up a **Webhook secret**.
4. Click **Connect Razorpay**. Keys are encrypted and never shown again.
5. Copy the URL shown under **Webhook**. In Razorpay, open **Webhooks**, add that URL with the event `payment_link.paid` and the same webhook secret.

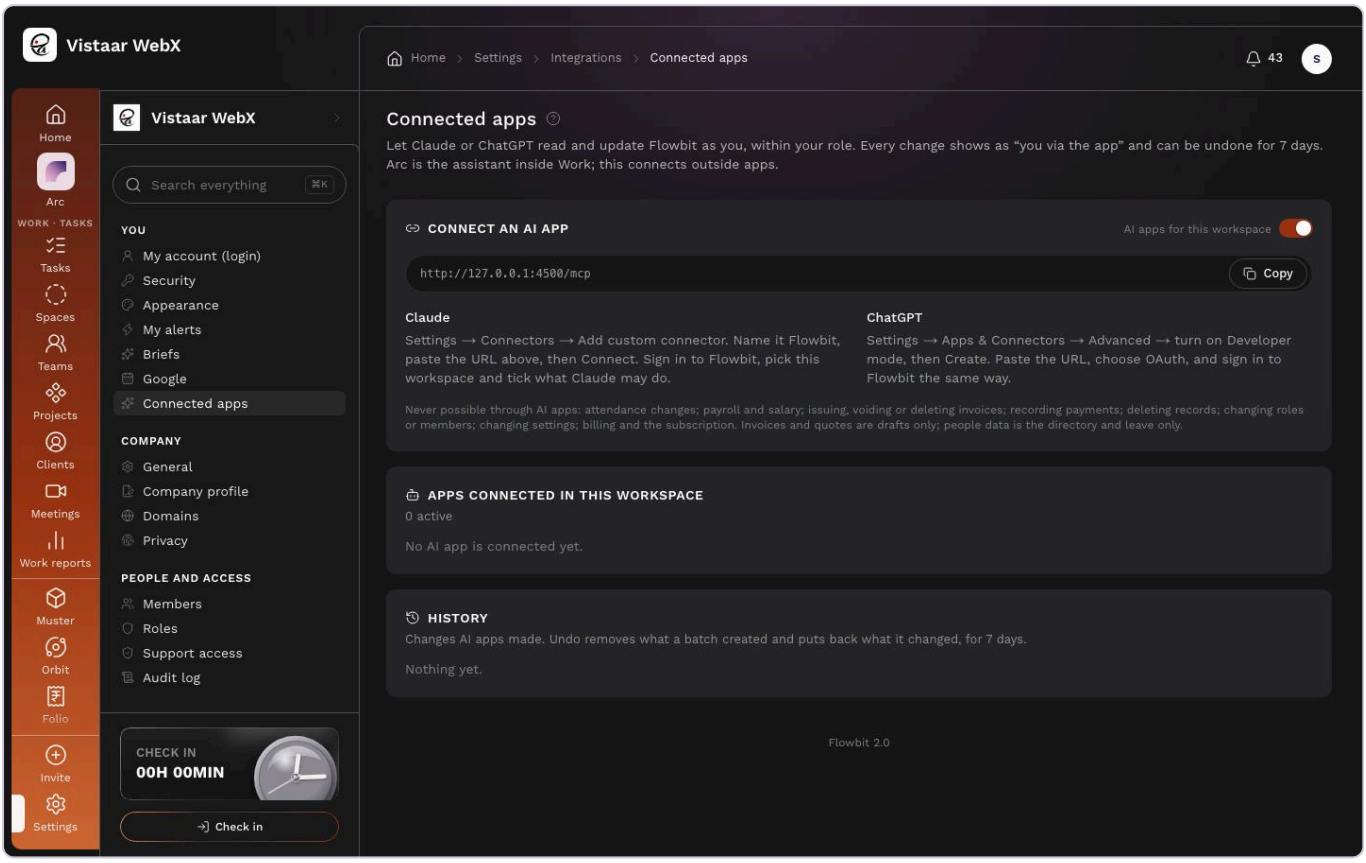
> **TIP**
> Test with `rzp_test_` keys and a small invoice first, then switch to live keys. Flowbit uses the keys only to create payment links for your invoices.

Connected apps: Claude and ChatGPT

Open: **Settings → Connected apps** `/app/settings/integrations/ai`

Who: everyone, for themselves; owners and admins switch it on or off

Flowbit has an MCP server, so an AI app you already use can read your Flowbit workspace and make changes as you, within your own role. Ask Claude "add tasks from these meeting notes" or ask ChatGPT "which invoices are overdue?" and it works with your real data.



Copy the URL shown here (your own workspace address) into Claude or ChatGPT.

1. Copy the connection URL shown on the page. It is your Flowbit address followed by `/mcp`.
2. In Claude, open **Settings → Connectors → Add custom connector** and paste it. In ChatGPT, turn on developer mode, create a connector and paste the same URL.
3. Sign in to Flowbit when asked, pick the workspace and untick anything you do not want the app to do. Then approve.

- The app can do only what your role can do, and only within the scopes you approved.
- Some things are never allowed through an AI app: attendance, payroll and salaries, issuing or voiding invoices, payments, deleting, roles, settings and billing. Salary, PAN and bank details are never sent to it.
- Every change is logged as "you via Claude" (or ChatGPT). **History** lists each batch of changes, and **Undo** reverses a batch for 7 days.
- Your connections are listed with when they were last used. **Revoke** cuts one off at once.

> **GOOD TO KNOW**
> Connected apps work on paid plans and during a trial, not on Free. Owners and admins can switch them off for the whole workspace.

Slack

Open: **Settings** → **Integrations** → **Slack** `/app/settings/integrations/slack`

Who: owner, admin to connect; everyone to use

Turn Slack messages into Flowbit tasks without leaving Slack. People act as themselves: Slack users are matched to Flowbit members by email.

1. Click **Add to Slack** and approve the Flowbit app for your Slack workspace.
2. In Slack, type `/flowbit task logo bhejo kal 5 baje @vikram`. The task is read the same way as quick add *(see the Work Guide)*, Hinglish included.
3. Type `/flowbit my day` to see what is due for you today.
4. On any message, open its ⋯ menu and choose **Create Flowbit task**.

> **GOOD TO KNOW**
> Slack has to be set up once on your Flowbit server before **Add to Slack** works. If the card says it is not configured, ask the person who runs Flowbit.

Webhooks

Open: **Settings** → **Integrations** → **Webhooks** `/app/settings/integrations/webhooks` Who: owner, admin

Send Flowbit events to Zapier, Make or your own server the moment they happen.

1. Under **Add a webhook**, give it a name and the URL to call (http or https).
2. Tick the events: task created, task completed, lead created, deal won, invoice issued and invoice paid.
3. Save, then send a test. The **Delivery log** shows the last 50 deliveries, kept for 30 days.

- Every delivery is signed in the `X-Flowbit-Signature` header (HMAC-SHA256), so your server can check it came from Flowbit.
- Failed deliveries are retried for about 9 hours. Edit a webhook's name, URL or events, pause it, or remove it at any time.
- Addresses on private networks are refused.

Email to task

Your address: **Settings** → **My account (login)** → **Email to task** Who: everyone with Flowbit Work

Forward or send any email to your private `tasks+…` address and it becomes a task assigned to you: the subject is the title, the body is the description, and attachments up to 4 MB each are added. One email makes one task.

- Send from the email address you sign in to Flowbit with. Mail that fails the sender's SPF, DKIM or DMARC check is refused.
- By default only you can use your address. Owners and admins can turn on **Allow teammates to email my address** in Settings → Security so members can send tasks to each other.
- Keep the address private. It shows only when your Flowbit server is set up to receive email.

Arc with real AI

Open: **Rail → Arc** Usage: **Settings → Integrations → Arc (AI)**

When your Flowbit server has an AI key, Arc drafts project outlines and task breakdowns and rewrites progress updates with Claude. Each plan has a number of AI requests a month (none on Free, 50 on a trial and 500 on paid plans by default). Past the limit, or without a key, Arc uses its built-in templates. Arc only drafts: nothing changes until someone clicks **Apply**, and salary, bank and PAN details are never sent to the AI.

PART 5

Data, privacy and security

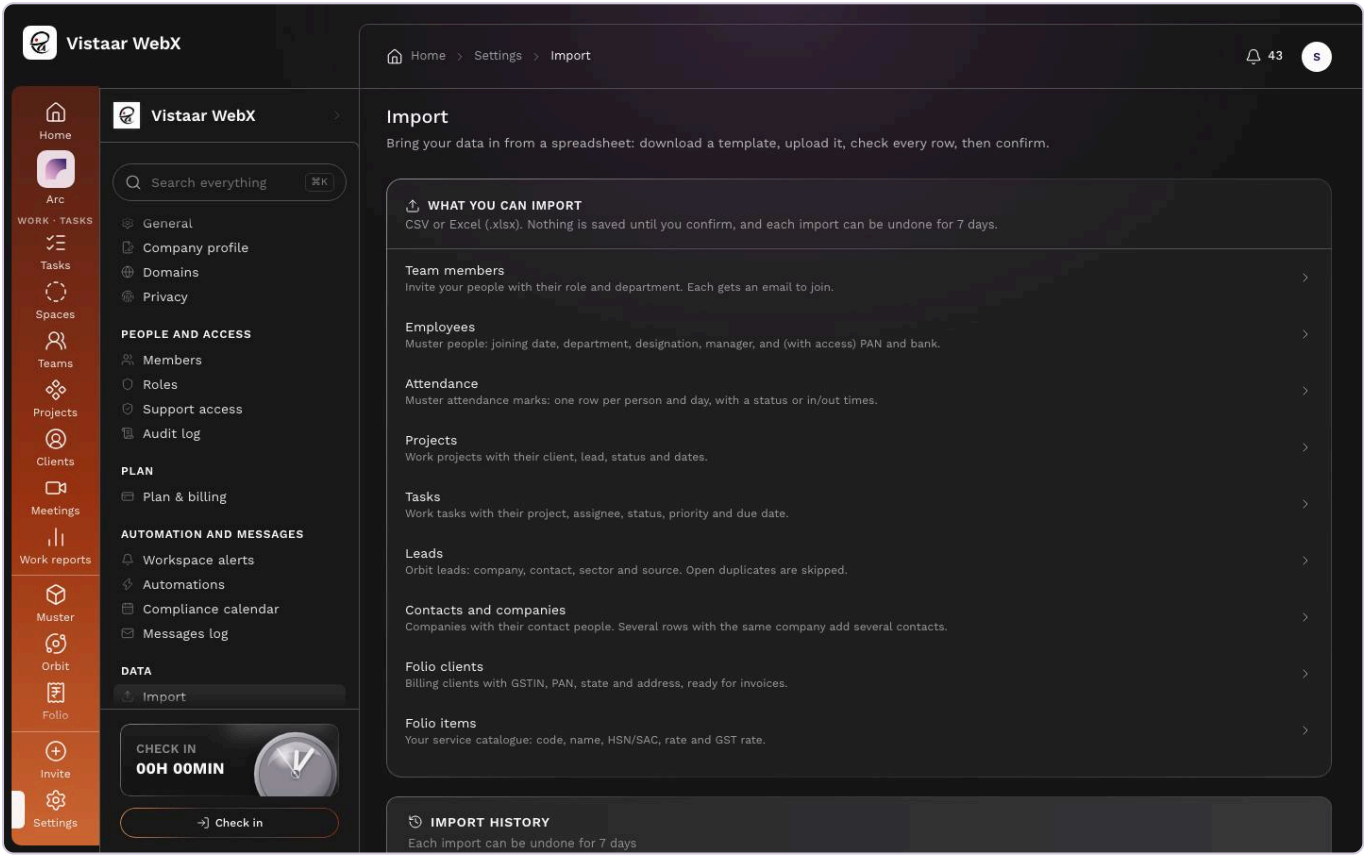
Import, export, privacy requests, compliance dates, the audit log, security and support access.

Import centre

Open: **Rail → Settings → Import** `/app/settings/import`

Who: owner and admins (each import also needs the matching permission)

Bring data in from a spreadsheet: download a template, upload it, check every row, then confirm. Nothing is saved until you confirm, and each import can be undone for 7 days.



Pick what to import; the history below lets you undo for 7 days.

WHAT YOU CAN IMPORT

- **Team members** — invites with role and department; each person gets an email to join.
- **Employees** — joining date, department, designation, manager, and (with access) PAN and bank.
- **Attendance** — one row per person and day, with a status or in and out times.
- **Projects** and **Tasks** — Work projects and tasks with client, lead or assignee, status, priority and dates.
- **Leads** — company, contact, sector and source. Open duplicates are skipped.
- **Contacts and companies** — several rows with the same company add several contacts.
- **Folio clients** — billing clients with GSTIN, PAN, state and address.
- **Folio items** — your service catalogue: code, name, HSN/SAC, rate and GST rate.

IMPORT A FILE

1. Click the kind of data, for example **Employees**.
2. Click **Download the template** and fill it in. CSV or Excel (.xlsx) both work.
3. Under **1 · Your file**, upload it. Flowbit checks every row.
4. Under **2 · Preview**, read the rows with errors, fix them in your file and upload again if needed.
5. Click the import button to save the rows that are ready.

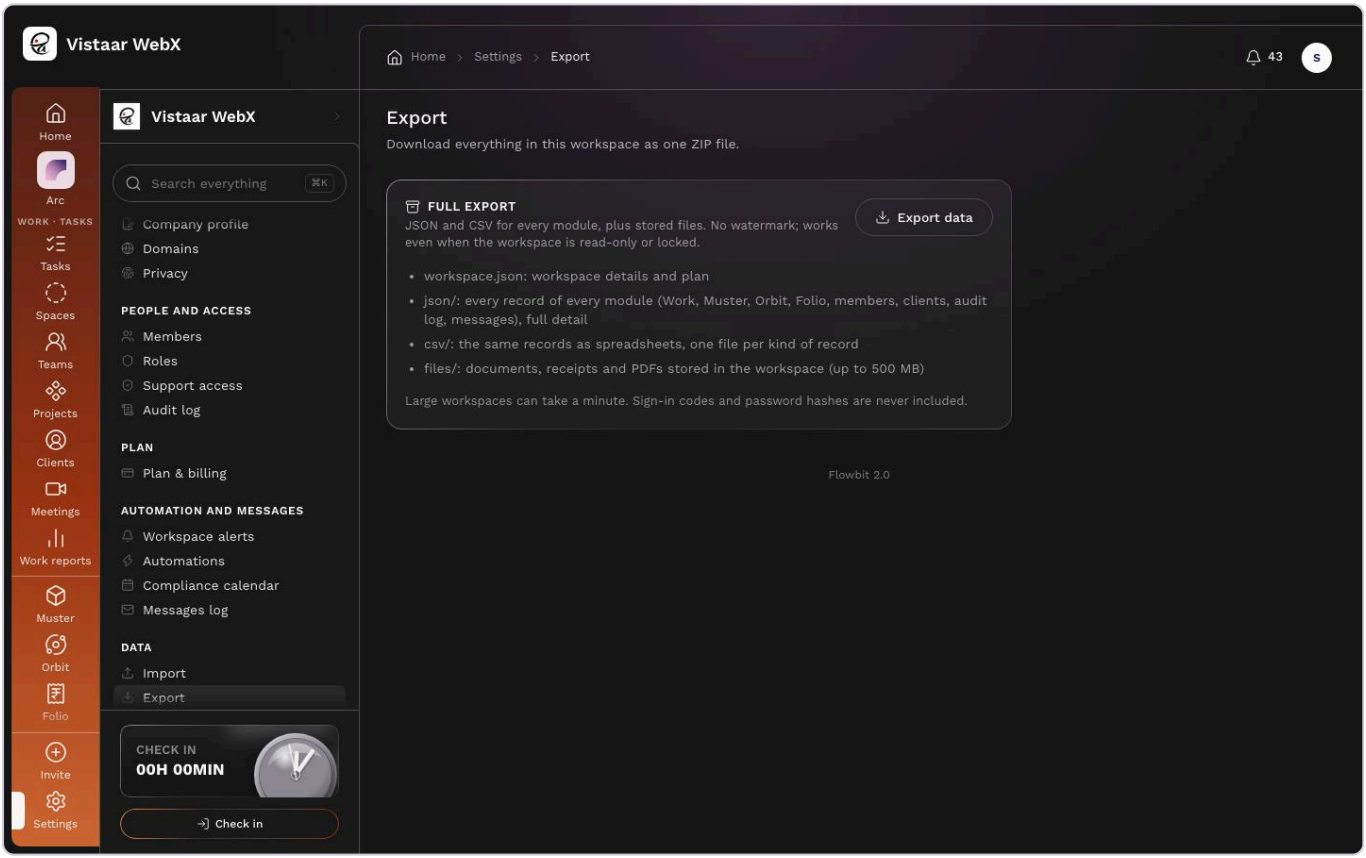
To reverse an import, find it in **Import history** and click **Undo** within 7 days.

> **TIP**
> Import in this order: employees, then team members (linked to their employee records), then projects and tasks. Folio clients before your first invoice.

Export all your data

Open: **Rail → Settings → Export** `/app/settings/export` Who: owner

Download everything in the workspace as one ZIP file. It works even when the workspace is read-only or locked, and has no watermark.



One button downloads the whole workspace.

1. Click **Export data**. Large workspaces can take a minute.
2. Open the ZIP. It holds `workspace.json` (workspace details and plan), a `json/` folder with every record of every module in full detail, a `csv/` folder with the same records as spreadsheets, and a `files/` folder with stored documents, receipts and PDFs (up to 500 MB).

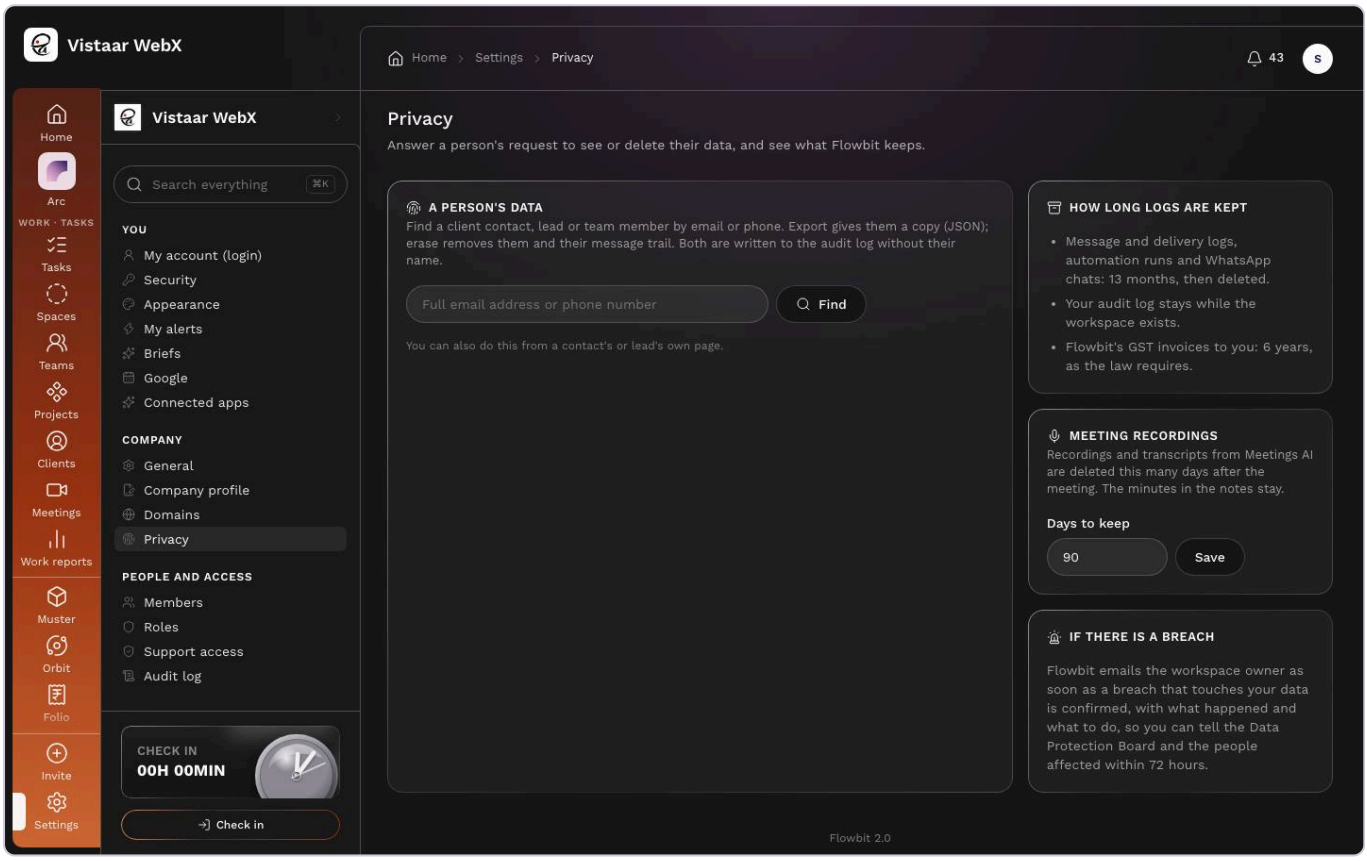
GOOD TO KNOW

Only the workspace owner can download the full export. Sign-in codes and password hashes are never included. Keep the file safe: it contains salaries, PAN and bank details.

Privacy and data requests

Open: **Rail → Settings → Privacy** `/app/settings/privacy` Who: owner, admin

Answer a person's request to see or delete their data under India's data protection law (the DPDP Act), and see how long Flowbit keeps logs.



Search by full email or phone number to find everything held about one person.

ANSWER A DATA REQUEST

1. Type the person's full email address or phone number and click **Find**. It finds client contacts, leads and team members.
2. Choose export to give them a copy of their data (JSON), or erase to remove them and their message trail.
3. Both actions are written to the audit log without the person's name.

You can also do this from a contact's or lead's own page.

CAREFUL

Erasing cannot be undone. Check you have the right person, and keep records the law requires (for example issued invoices) before you erase.

HOW LONG LOGS ARE KEPT

- Message and delivery logs and automation runs: 13 months, then deleted.
- Your audit log: as long as the workspace exists.

- Flowbit's invoices to you: 6 years, as the law requires.

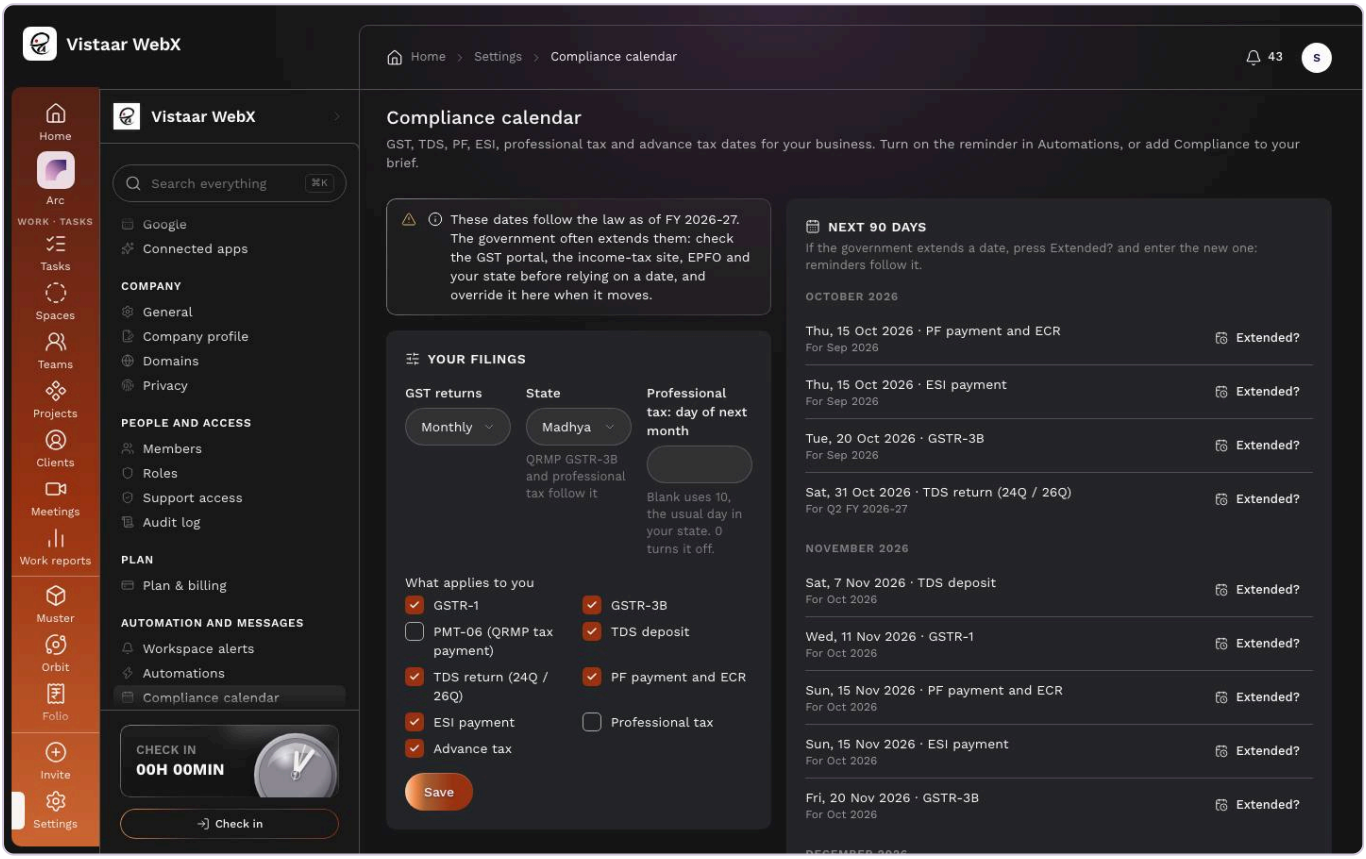
> **GOOD TO KNOW**
> If a breach touches your data, Flowbit emails the workspace owner as soon as it is confirmed, and aims to do so within 24 hours, with what happened and what to do, so you can tell the Data Protection Board and the people affected within 72 hours.

Compliance calendar

Open: **Rail → Settings → Compliance calendar** `/app/settings/compliance`

Who: owner, admin, finance (Folio settings)

GST, TDS, PF, ESI, professional tax and advance tax due dates for your business. Turn on the reminder in **Automations**, or add Compliance to your brief.



Set what applies to you once; the next 90 days of due dates follow.

SET UP YOUR FILINGS

1. Under **GST returns**, choose **Monthly filer** or **Quarterly (QRMP)**.
2. Pick your **State**. QRMP GSTR-3B and professional tax dates follow it.
3. In **Professional tax: day of next month**, leave it blank for the usual day (10), type another day, or 0 to turn it off.
4. Under **What applies to you**, tick the filings you make: GSTR-1, GSTR-3B, PMT-06, TDS deposit, TDS return (24Q / 26Q), PF payment and ECR, ESI payment, Professional tax, Advance tax.
5. Click **Save**.

WHEN THE GOVERNMENT EXTENDS A DATE

1. Find the date under **Next 90 days**, for example GSTR-3B on 20 Oct 2026.
2. Click **Extended?** and enter the new date. Reminders follow it.

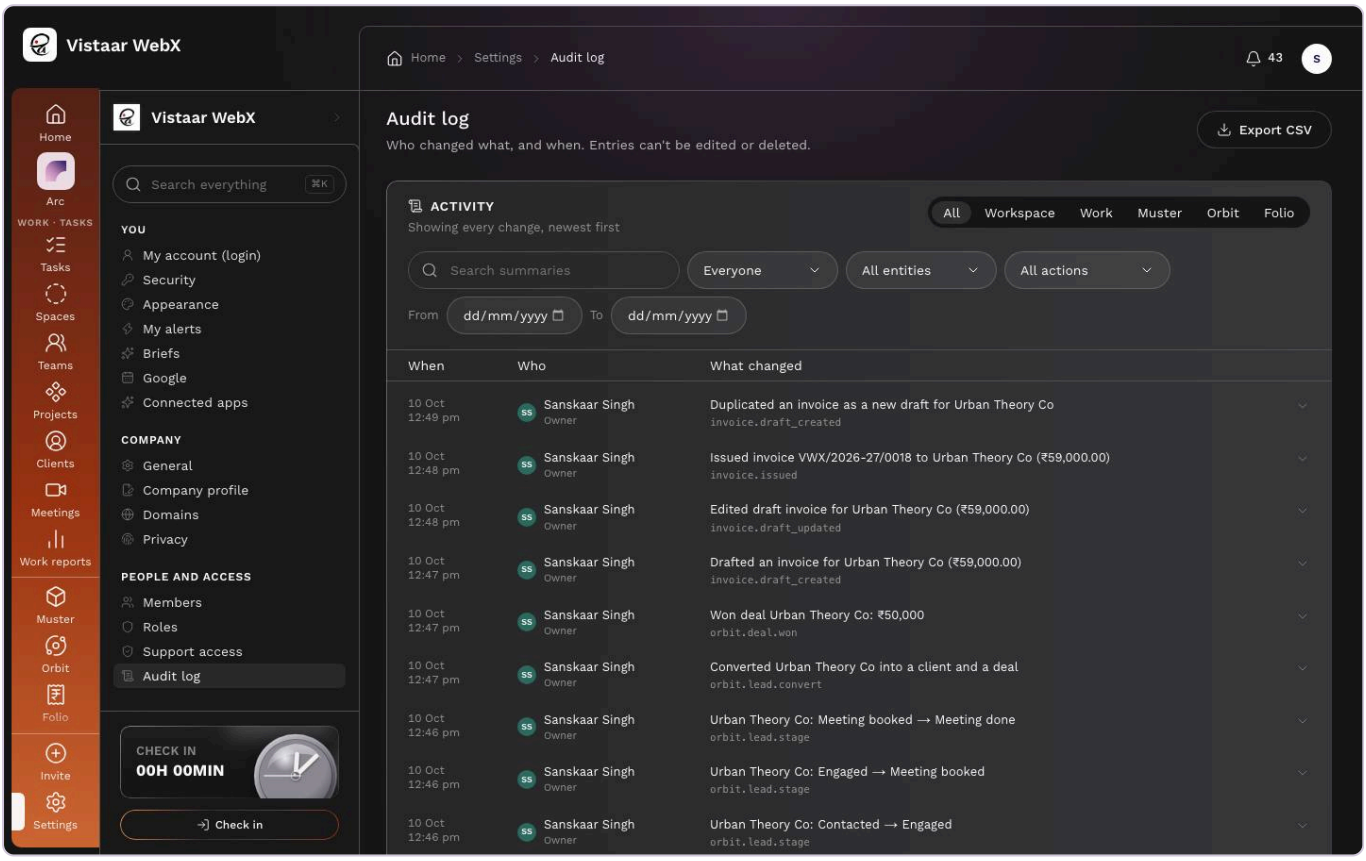
CAREFUL

The dates follow the law as of FY 2026-27. Due dates are often extended: check the GST portal, the income-tax site, EPFO and your state before relying on a date.

Audit log

Open: **Rail → Settings → Audit log** `/app/settings/audit` Who: owner, admin, HR admin, finance

Who changed what, and when. Entries cannot be edited or deleted, so this is your record for disputes, audits and "who did this?" questions.



Each entry shows when, who (with their role), what changed and the action code.

FIND A CHANGE

1. Pick a product tab: **All**, **Workspace**, **Work**, **Muster**, **Orbit** or **Folio**.
2. Narrow it with **Search summaries**, **Who**, **Entity**, **Action** and the **From** and **To** dates. For example, Who = Aditi Sharma and Action = member.role_changed shows every role she changed.
3. Click an entry to see the details of the change.
4. Click **Export CSV** to download what you filtered.

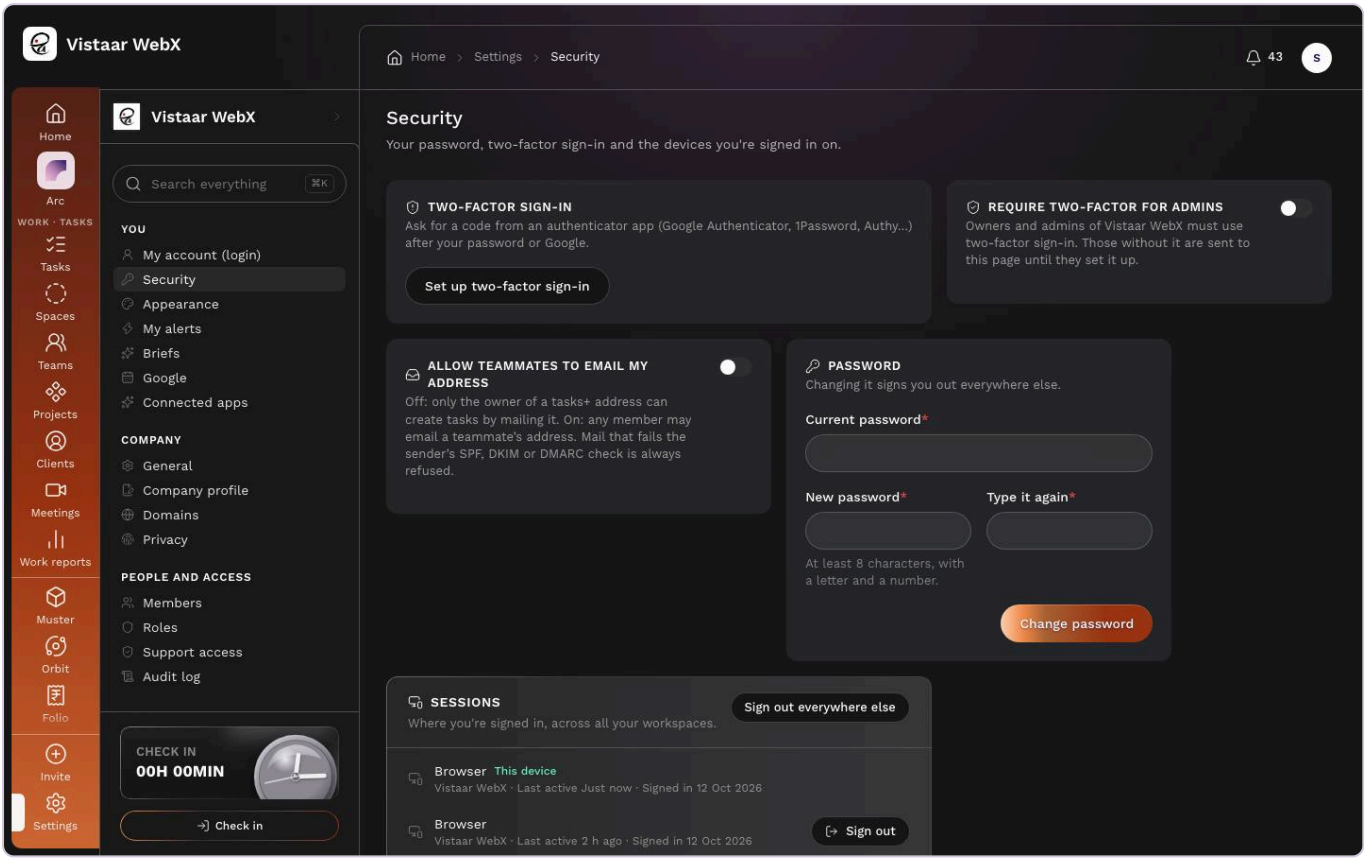
GOOD TO KNOW

Actions by the Flowbit support team, such as extending a trial, appear here too, marked as Flowbit support.

Security: password, two-factor and sessions

Open: **Rail → Settings → Security** `/app/settings/security` Who: everyone

Change your password, turn on two-factor sign-in and see every device you are signed in on, across all your workspaces.



Two-factor sign-in, the admin requirement, your password and your sessions on one page.

CHANGE YOUR PASSWORD

1. Type your **Current password**.
2. Type a **New password**: at least 8 characters, with a letter and a number.
3. Type it again in **Type it again**.
4. Click **Change password**.

> **GOOD TO KNOW**
> Changing your password signs you out on every other device. Use this if a phone or laptop is lost.

TURN ON TWO-FACTOR SIGN-IN

With two-factor sign-in, Flowbit asks for a 6-digit code from an authenticator app (Google Authenticator, Microsoft Authenticator, 1Password and similar) after your password or Google sign-in.

1. In the **Two-factor sign-in** card, click **Set up two-factor sign-in**.
2. Scan the **QR code for your authenticator app**, or type the key shown under it.
3. Type the **Code from the app** and click **Turn on two-factor sign-in**.
4. Save the 10 **Recovery codes** somewhere safe (**Copy codes**), then click **I saved them**. They are shown only once; each works one time.

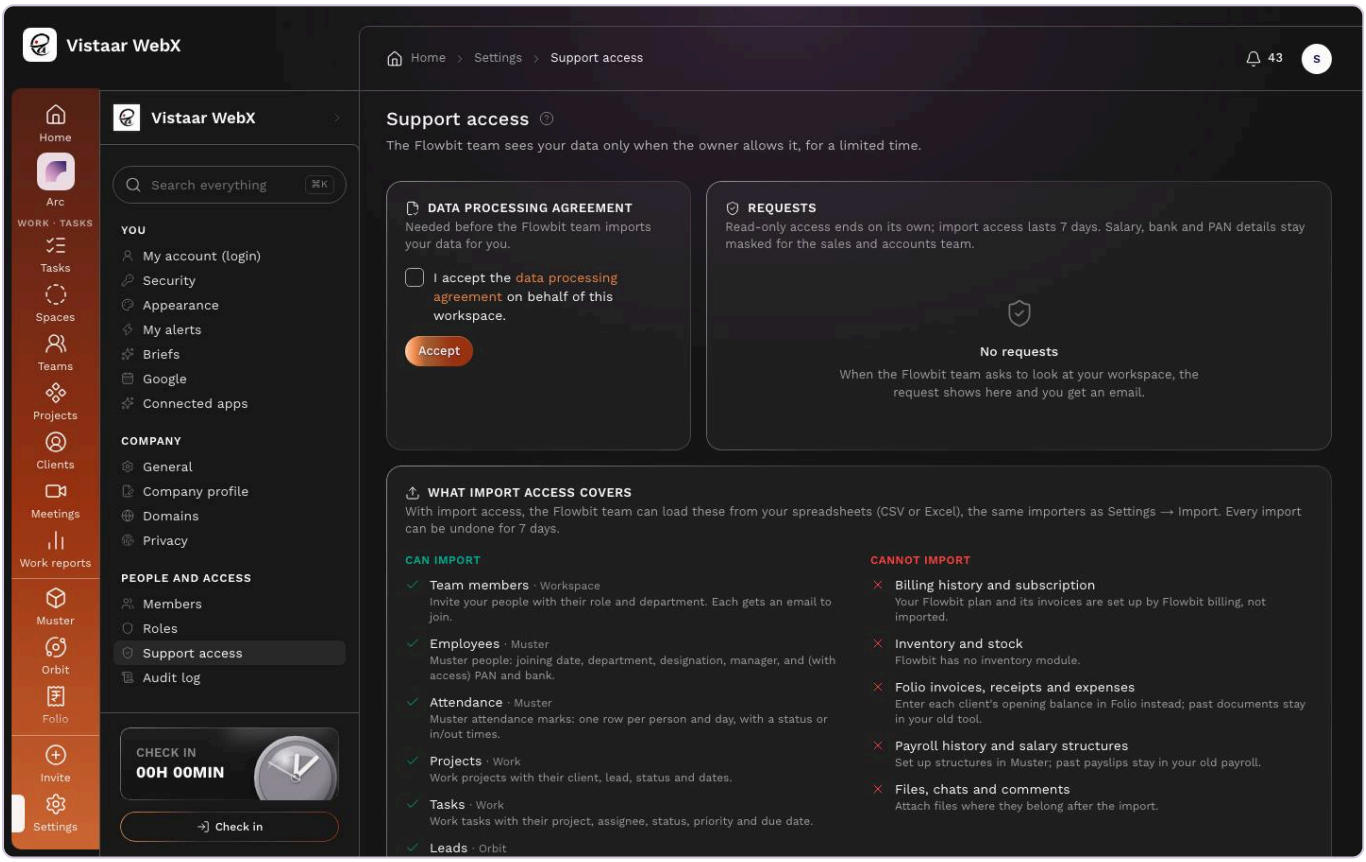
When you sign in you can tick "remember this device for 30 days". **New recovery codes** replaces the old set, and **Turn off** goes back to password or Google alone.

> **TIP**
> Owners and admins can tick **Require two-factor sign-in for admins** once their own two-factor is on. Owners and admins without it are then sent to this page before they can do anything else. Lost your phone and your codes? A workspace admin can reset your two-factor from Members; only the owner can reset the owner's.

Support access

Open: **Rail → Settings → Support access** `/app/settings/support` Who: owner, admin

The Flowbit team sees your data only when the owner allows it, for a limited time. This page is where you approve those requests and accept the data processing agreement.



Requests from the Flowbit team appear in the list below the agreement.

LET FLOWBIT IMPORT YOUR DATA FOR YOU

1. Read the **data processing agreement**.
2. Tick **I accept the data processing agreement on behalf of this workspace.** and click **Accept**.
3. When the Flowbit team asks to look at your workspace, the request shows under **Requests** and you get an email. Approve or decline it there.

> **GOOD TO KNOW**
> Read-only access ends on its own; import access lasts 7 days. Flowbit staff never see salary, bank or PAN details: they stay masked for every Flowbit role, admins included. Free setup by the Flowbit team is offered to yearly customers.

PART 6

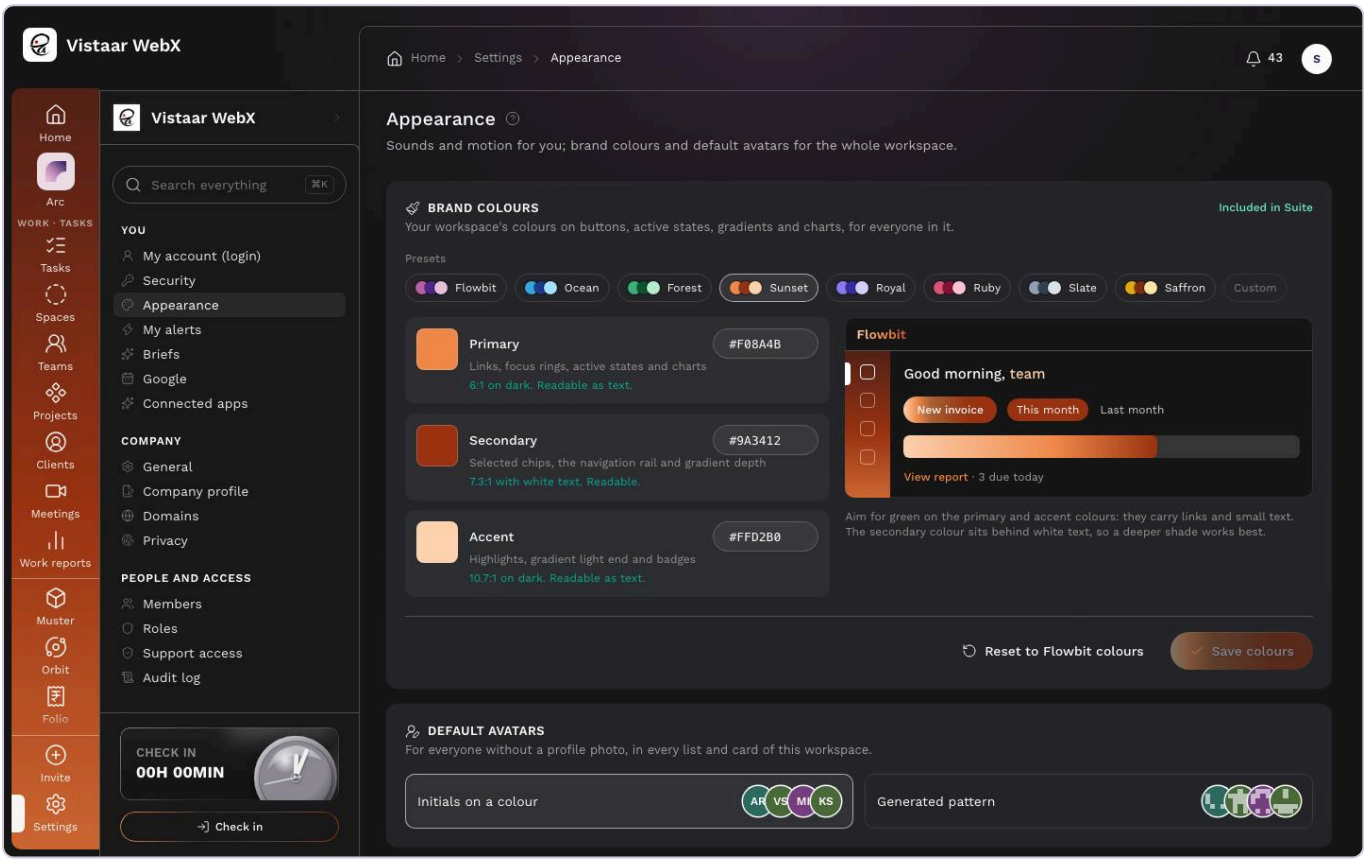
Appearance and status

Brand colours and themes, and the public status page.

Appearance: colours, sounds and motion

Open: **Rail → Settings → Appearance** `/app/settings/appearance` Who: everyone (brand colours: owner, admin)

Sounds and motion are your own choice. Brand colours change the look for everyone in the workspace.



Each colour shows a contrast score so you can see whether text stays readable.

SET YOUR BRAND COLOURS

1. Under **Brand colours**, pick or type a hex value for **Primary** (links, focus rings, active states, charts), **Secondary** (selected chips, the navigation rail, gradient depth) and **Accent** (highlights and badges).
2. Check the preview card and the contrast line under each colour. Aim for "Readable".
3. Click **Save colours**. **Reset to Flowbit colours** undoes it.

> **TIP**
> Primary and accent carry links and small text, so pick shades that read well on a dark background. Secondary sits behind white text, so a deeper shade works best. Brand colours are included in the Suite plan.

SOUNDS AND MOTION

- **Play sound effects** — short, quiet sounds for real actions (Click, Toggle on, Toggle off, Pop, Success, Error, Notify, Whoosh). Click **Test** next to each to hear it. The setting follows you to every

workspace.

- **Motion** — **Match my device**, **Reduce motion** (no gradient animation and no hover lift) or **Full motion**.

Status page

Open: **useflowbit.com/status** `/status` Who: anyone, no sign-in

A public page that shows whether Flowbit is working: the app, the database, file storage and email, and when each scheduled job (reminders, recurring invoices, briefs and the like) last ran. Check it first when something seems slow or an email has not arrived, then write to support.

PART 7

Questions people ask

Short answers from the Flowbit FAQ. The full list is at useflowbit.com/faq.

SETTINGS AND SECURITY

How do roles and permissions work?

Everyone has a role. Eight are built in (Owner, Admin, HR admin, HR executive, Finance, Manager, Sales and Member), so most teams change nothing. Need something else? Create a custom role and tick exactly what it can see and do, product by product.

Can I hide products we don’t use?

Yes. Settings → Modules turns products on or off, and what is off disappears from everyone’s navigation.

Can our PDFs carry our letterhead and signature?

Yes. Settings → Company profile holds your legal name, GSTIN, PAN, address and logo, and your authorised signatories with their signature and an optional seal. Invoices, quotes, receipts, statements, HR letters and Form 130 print them; payslips only if you switch it on. Only owners and admins can change signatories.

Can Flowbit use our brand colours?

Yes, on Suite and during a trial. Settings → Appearance sets your primary, secondary and accent colours (or one of eight presets), with a contrast check. They apply across the app for everyone, on your PDFs, in client emails and in the client portal.

Can I control which alerts I get by email?

Yes. In My alerts each person picks in-app or email for each kind of event, on top of the workspace defaults. Choose an hourly or end-of-day digest, quiet hours (21:00 to 08:00 by default) and snooze. Approval and task emails have buttons to approve, reject, mark done or snooze straight from the email. Each button works once, for 7 days, without signing in, for whoever has the email, so don't forward approval emails. Expense claims and bank account changes ask the person they were sent to to sign in first.

What is a morning brief?

An email at the time and days you choose with your day in one place: tasks due and overdue, approvals waiting, who is out, money due and received, sales follow-ups and statutory dates. Pick the sections, skip it when empty, and send yourself a preview.

What can automations do?

Ready-made recipes you switch on or off in Settings → Automations: payment thank-yous, quote follow-ups, leave escalations, meeting reminders, birthday posts, probation and document reminders, new-lead alerts and more. Edit the wording, test it on yourself, or build your own rule from an event or a date.

Can I bring data from other tools?

Yes. Settings → Import has CSV or Excel templates for team members, employees, attendance, projects, tasks, leads, contacts and companies, Folio clients and items. You see a preview with row errors before anything is saved, and can undo an import within 7 days.

Can I export all my data?

Yes. The owner can download the whole workspace as a ZIP of JSON, CSV and files from Settings → Export, at any time, even after a plan ends. Reports, ledgers and lists also export to CSV.

How do you handle personal data and the DPDP Act?

For your clients' and employees' data, Flowbit is your data processor under a data processing agreement. Settings → Privacy exports or erases one person's data on request. Message and processing logs are kept 13 months, then deleted. Flowbit staff see your workspace only when the owner grants access, and never see salary, bank or PAN details.

Is my data kept separate from other companies'?

Yes. Every record belongs to one workspace and every request is checked against it. Roles decide who sees what inside your workspace, and sensitive changes are written to the audit log.

How secure is Flowbit?

Traffic is HTTPS only, secrets such as payment keys are encrypted, files sit in private storage, and every change is checked against your role on the server. Workspace data is stored in India: the app runs on Vercel and the database on MongoDB Atlas, both in Mumbai (AWS ap-south-1). Some providers process data outside India when their feature is used, such as email (Resend), AI drafting (Anthropic) and the meeting notetaker (Recall.ai). The Security page has the details.

Does Flowbit have two-factor sign-in?

Yes. Turn it on in Settings → Security with any authenticator app; you get 10 recovery codes and can remember a device for 30 days. Owners and admins can require it for every owner and admin in the workspace.

Can I see who changed what?

Yes. The audit log records important changes (payroll steps, salary and bank changes, roles, exports, integrations) with who did it and when, and exports to CSV.

Does Flowbit remind us of statutory due dates?

Yes. Settings → Compliance calendar lists GST, TDS, PF, ESI, professional tax and advance tax dates for the year, set for your state and filer type. Reminders go out 3 days before. Always check a date before relying on it.

How big can uploaded files be?

Attachments, receipts, documents and images: 4 MB each on the hosted service. Profile photo: 2 MB. Company and firm logos: 1 MB. Meeting recordings (Meetings AI): 200 MB. Spreadsheet to import: 3 MB. Files in one full export: 500 MB (the rest are listed in the ZIP).

How many rows can I import at once?

Rows per file: team members 200, employees 500, attendance 5,000, projects 500, tasks 2,000, leads 2,000, contacts and companies 2,000, folio clients 2,000, folio items 1,000; biometric punch logs 50,000 punches. Split a bigger file and import it in parts.

How do I know if Flowbit is down?

Open the public Status page. It shows the app, database, file storage and email, and when each scheduled job last ran.

INTEGRATIONS AND AI

What can Arc, the AI assistant, do?

Ask Arc about your workspace in plain words and it finds the tasks, clients and posts you mean. It can also outline a project, break a big task into steps, or write a progress update from real activity.

Will Arc change my data?

No. AI reads, people decide. Arc drafts; nothing is created or changed until you click Apply. Salary, bank and PAN details are stripped out before anything is sent to the AI.

How many AI requests do I get?

Each plan has a monthly allowance: none on Free, 50 during a trial and 500 a month on paid plans by default. Settings → Integrations shows how many you have used. Past the limit Arc keeps working with its built-in templates.

Can I use Flowbit from Claude or ChatGPT?

Yes. Flowbit has an MCP server. Copy the connection URL from Settings → Connected apps, add it as a custom connector in Claude or ChatGPT, sign in and approve what it may do. Then ask it to add tasks from meeting notes, list today’s follow-ups or review overdue invoices. Available on paid plans and during a trial.

What can a connected AI app do in my workspace?

Only what your role allows, within the scopes you approved. It can never touch attendance, payroll or salaries, issue or void invoices, record payments, delete anything, or change roles, settings or billing, and it never sees salary, PAN or bank details. Every change is logged as “you via Claude” and can be undone for 7 days. Limits: 120 requests a minute, 50 changes in one go and 500 changes a day per workspace.

Does Flowbit work with Google Calendar and Meet?

Yes. Each person connects their own Google Calendar in Settings → Google (in the Personal group). Meetings you schedule in Work go on your calendar with a Google Meet link, and moving or cancelling them in Flowbit updates Google. Your own Google events show, read-only, on the Meetings calendar.

Does Flowbit work with Slack?

Yes. Once an admin adds the Flowbit app to Slack, type /flowbit task with a task in plain words or Hinglish, /flowbit my day for what is due, or turn any message into a task from its menu. Slack users act as themselves, matched by email.

Can I connect Flowbit to Zapier or Make?

Yes, with webhooks. Settings → Integrations → Webhooks sends task created or completed, lead created, deal won, invoice issued and invoice paid to any URL, signed so your server can check it, and retried if it fails.

Can I turn an email into a task?

Yes. Forward or send it to your private tasks+ address (shown in Settings → My account). The subject becomes the title, the body the description, and attachments are added. Only mail from your own address is accepted, unless an admin turns on "Allow teammates to email my address" in Settings → Security. Mail that fails SPF, DKIM or DMARC is refused. When a mail is refused, you get a notice in Flowbit saying why.

Does Flowbit work with WhatsApp?

WhatsApp messages from your own business number are coming soon. Today, alerts, reminders and documents go in the app and by email.