# NexBasira — How to use

**Role-based guides for the remote-inspection platform**

*None*

*None*

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# 1. NexBasira — How to use the platform

Practical, screenshot-driven guides for every kind of user. Pick the guide that matches your role.

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| Organization | Org admins & managers | Members & operators, operator schedules, GDPR/compliance, campaigns, beneficiaries, contacts, addresses, live control sessions |
| Operator | Inspectors who run the video checks | Your queue & calendar, joining and running a live inspection, evidence & chat, finishing and reporting |
| Reseller / Partner | Partners who resell NexBasira | Partner console, your organizations, commissions, team roles, opening a client's console |

**Conventions used in these guides.** Screenshots are annotated: a **red box** marks the control you should look at, with a short label. Steps are numbered. Anything that sends a message, places a call, deletes data, or changes billing is called out with a note.

Prefer a single document? Download the full guide as a PDF.

## 1.1 The big picture

NexBasira runs **remote inspections**: a beneficiary is contacted, a short **video "control" session** is scheduled (or started immediately), and an **operator** verifies the situation live while evidence is captured and cryptographically time-stamped for the final report. Work is organized into **campaigns** (a batch of beneficiaries to inspect for one purpose), and can be run manually or with the **AI voice agent** (Smart Queue) that calls beneficiaries and books them automatically.

# 2. Organization guide

For **organization admins and managers** — the people who set up their team, run campaigns, manage the people being inspected, and keep the account compliant. This is the most complete guide; if you only read one, read this.

## 2.1 Contents



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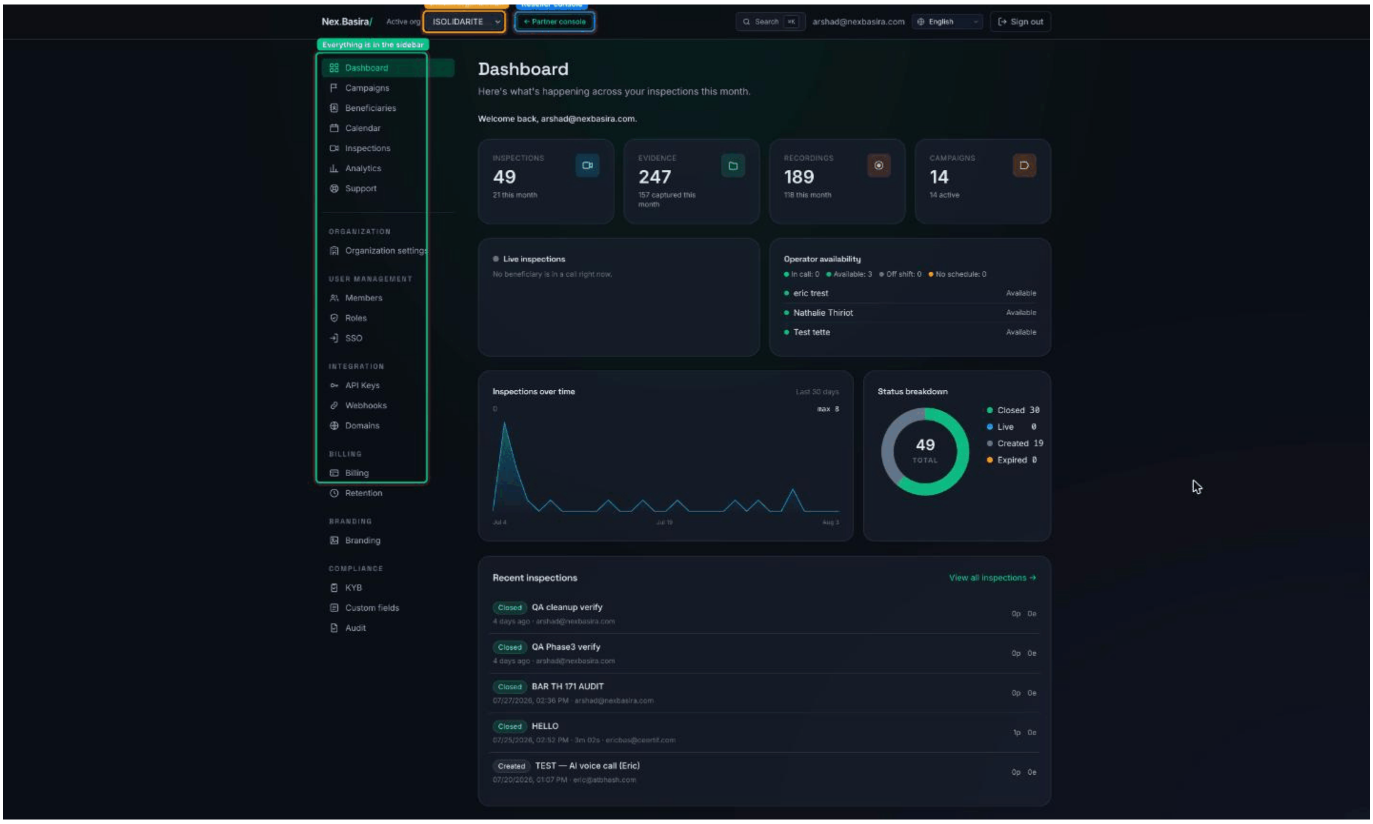
## 2.2 1. Getting oriented

Everything lives behind the left sidebar. The top bar has three things that matter every day:

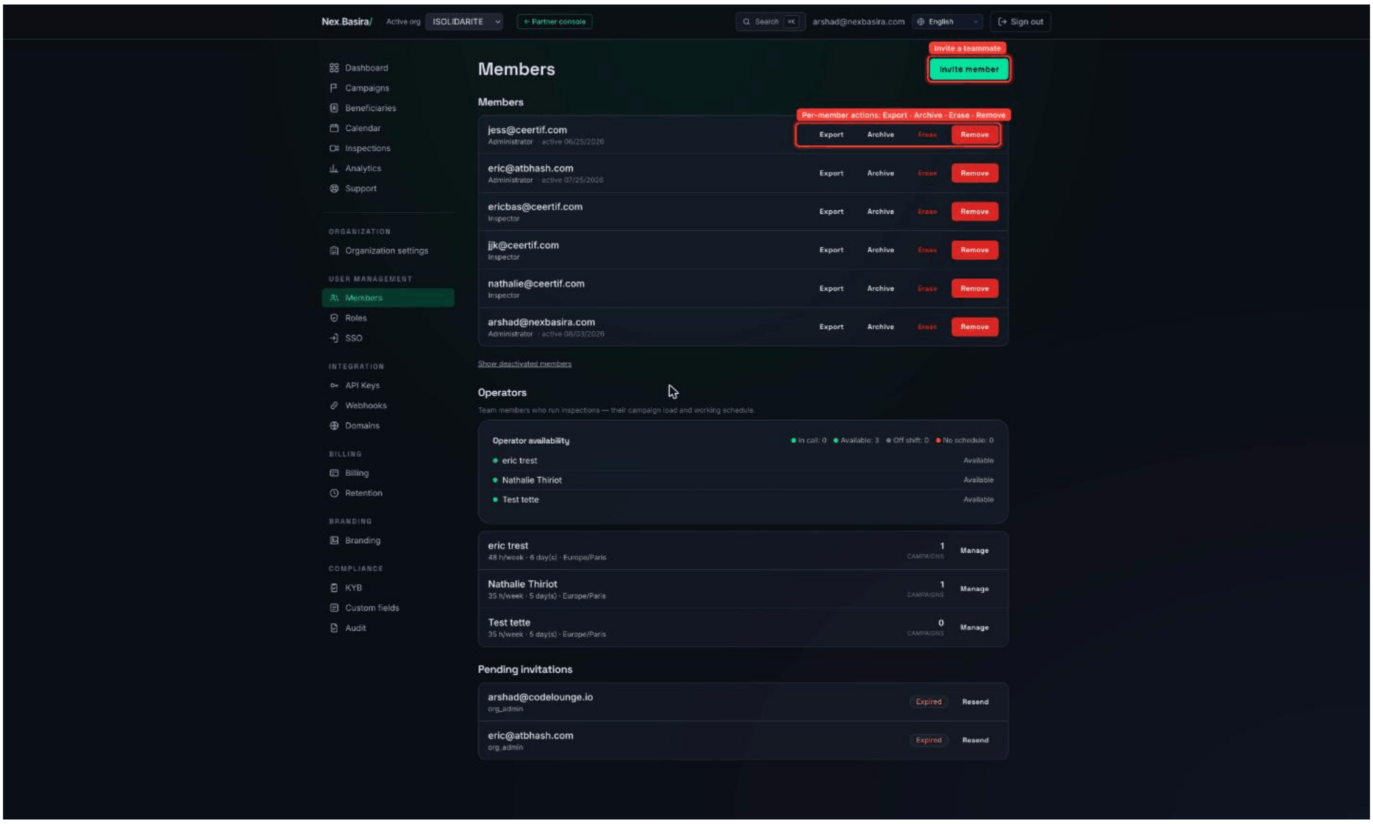
- **Active org** — if you belong to more than one organization, switch here. Everything you see (members, campaigns, beneficiaries) is scoped to the selected org.
- **Search** (⌘K) — jump to any campaign, beneficiary, or contact.
- **Partner console** — only visible to resellers; see the Reseller guide.

The sidebar groups features: **Organization** (settings), **User management** (Members, Roles, SSO), **Integration** (API keys, Webhooks, Domains), **Billing**, **Branding**, and **Compliance** (KYB, Custom fields, Audit).




## 2.3 2. Members & roles

**Members** are the people who can log into your organization. Open **User management → Members**.



### 2.3.1 Roles at a glance

Each member has a role that controls what they can do. The built-in roles:

| Role | Can do |
|---|---|
| **Administrator** | Everything — team, billing, campaigns, compliance. |
| **Manager** | Run campaigns and beneficiaries; no billing/admin. |
| **Operator / Inspector** | Run the live inspections assigned to them; no admin. |
| **Supervisor** | Read-only, org-wide (dashboards & analytics across all operators). |
| **Billing** | Billing and invoices only. |
| **Observer** | Read-only. |

Roles are managed under **User management → Roles**, where you can also create **custom roles** by ticking exactly the permissions you want.

### 2.3.2 Inviting a member

1. Click **Invite member** (top-right).
2. Enter their email and pick a role.
3. They receive an email invite → set a password → they're in.

Pending invites appear at the bottom of the page with a **Resend** button; an expired invite can be resent from there.

### 2.3.3 Managing an existing member

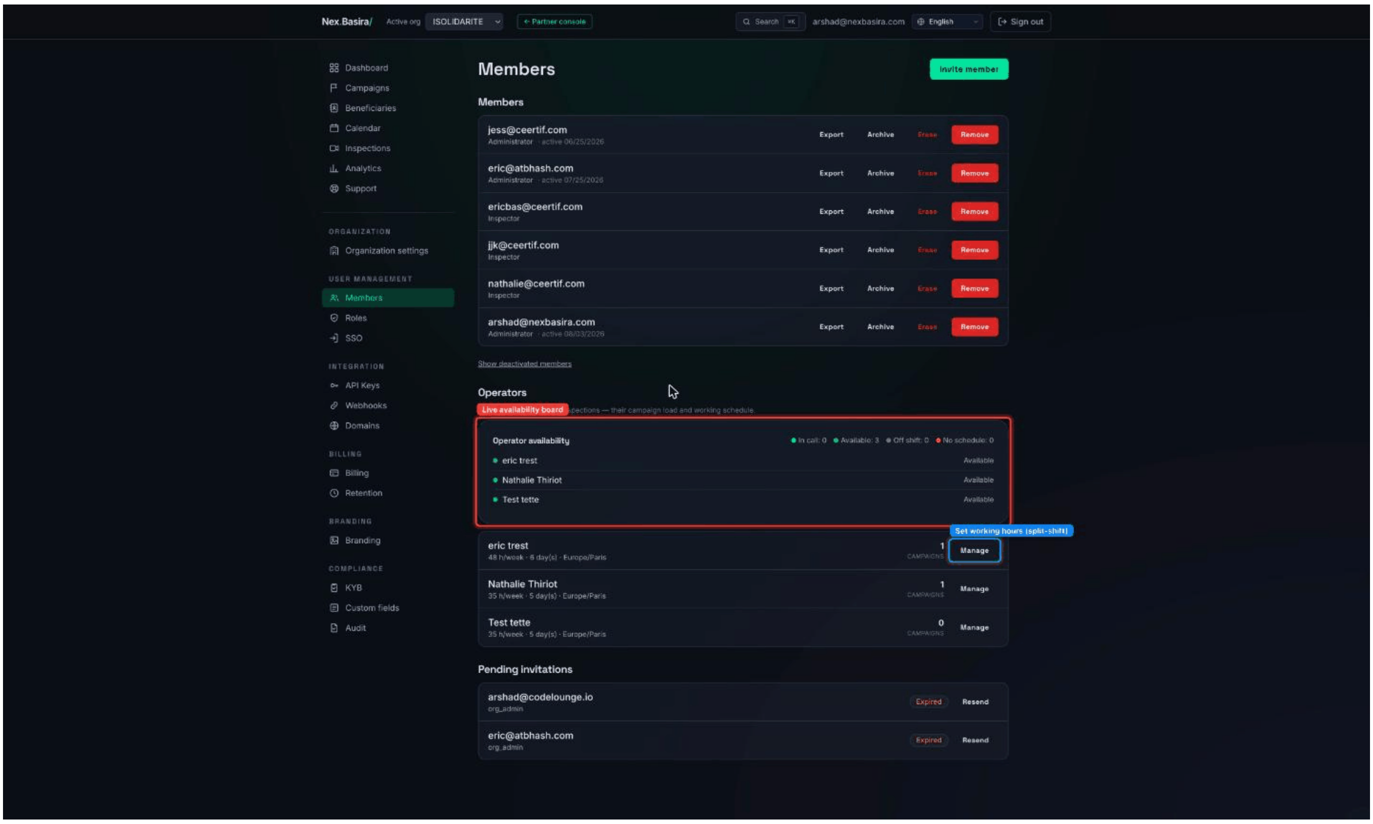
Each row has four actions:

- **Export** — download that member's activity/data.
- **Archive** — deactivate the member (they can't log in) but keep their history. Reversible via **Show deactivated members → Restore**.
- **Erase** — GDPR erasure of the person's personal data. Different from Archive: this is about the *right to be forgotten*, not just access. See GDPR & compliance.
- **Remove** — take the member out of the organization.

> **Archive vs Erase vs Remove.** *Archive* is the safe, reversible "turn off access" action. *Remove* takes them out of the org. *Erase* is the irreversible GDPR deletion of personal data — only use it for a genuine erasure request.

## 2.4 3. Operators & schedules

**Operators** are the members who actually run the video inspections. They show up in a dedicated block on the same **Members** page, below the member list.




## 2.4.1 Operator availability

The **Operator availability** panel is a live board:

- **In call** — currently in an inspection.
- **Available** — on shift and free.
- **Off shift** — outside their working hours.
- **No schedule** — no working hours set yet (they won't be given automatic work until a schedule exists).

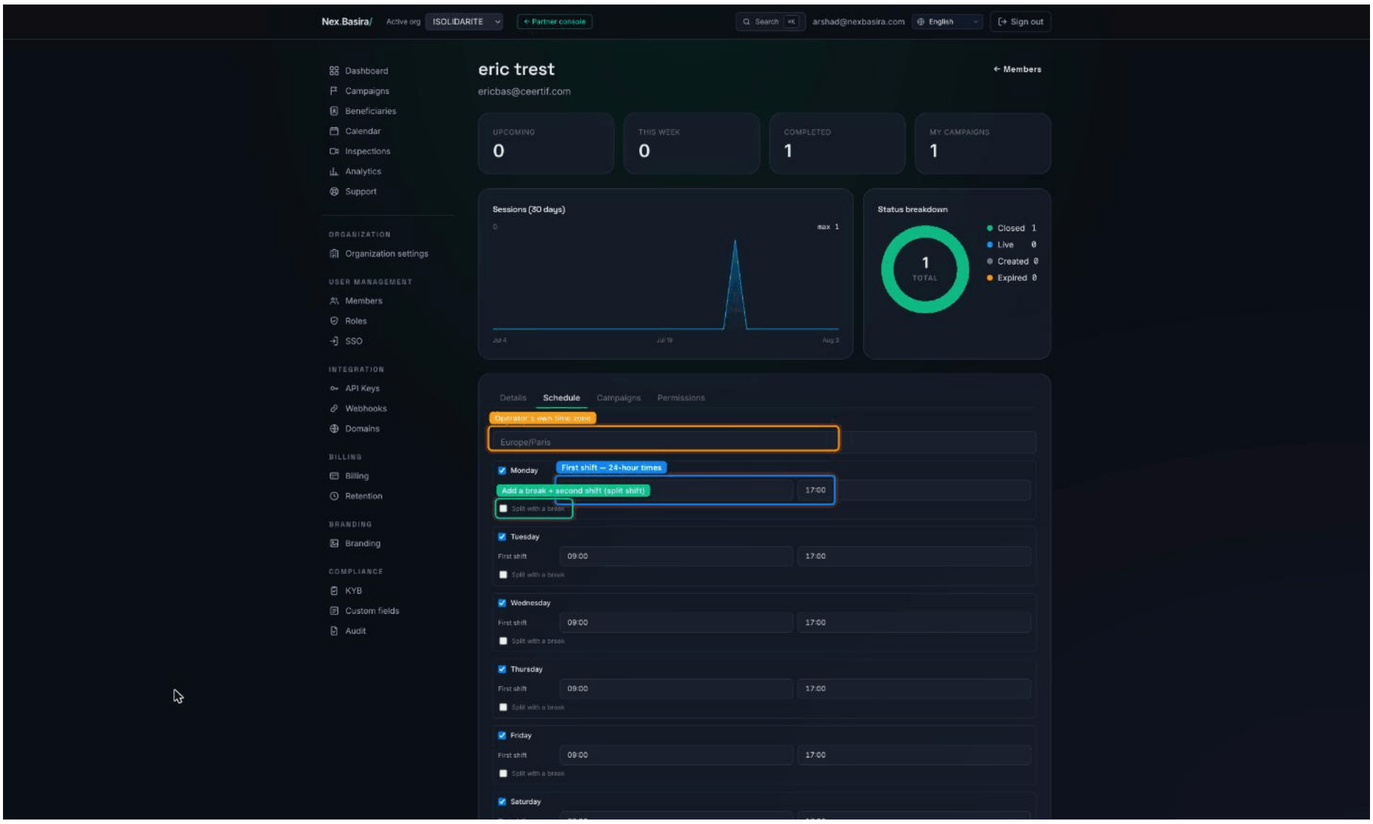
## 2.4.2 Reading the operator rows

Under the availability board, each operator has a summary row: `48 h/week · 6 day(s) · Europe/Paris` and a **campaigns** count — how many campaigns they're assigned to. Click **Manage** to open that operator's **working schedule**.

## 2.4.3 The working-schedule editor

The schedule editor sets an operator's **weekly working hours** in their own time zone. For each weekday you set:

- Whether the operator **works** that day.
- A **first shift** (e.g. 09:00–12:00), an optional **break**, and an optional **second shift** (e.g. 14:00–18:00) — the split-shift model, so lunch and part-time patterns are exact.
- All time fields are **24-hour** (`14:00`, not `2:00 PM`).




The schedule feeds two things: the **availability board** above, and the **Smart Queue / booking wave**, which only offers work to operators who are on shift and under capacity. An operator with **No schedule** is never auto-assigned — set their hours first.

**Tip.** Time zones are per-operator. A schedule of 09:00–18:00 `Europe/Paris` and 09:00–18:00 `Europe/Lisbon` are one hour apart in real time — the platform handles the conversion; you just set each operator's local hours.

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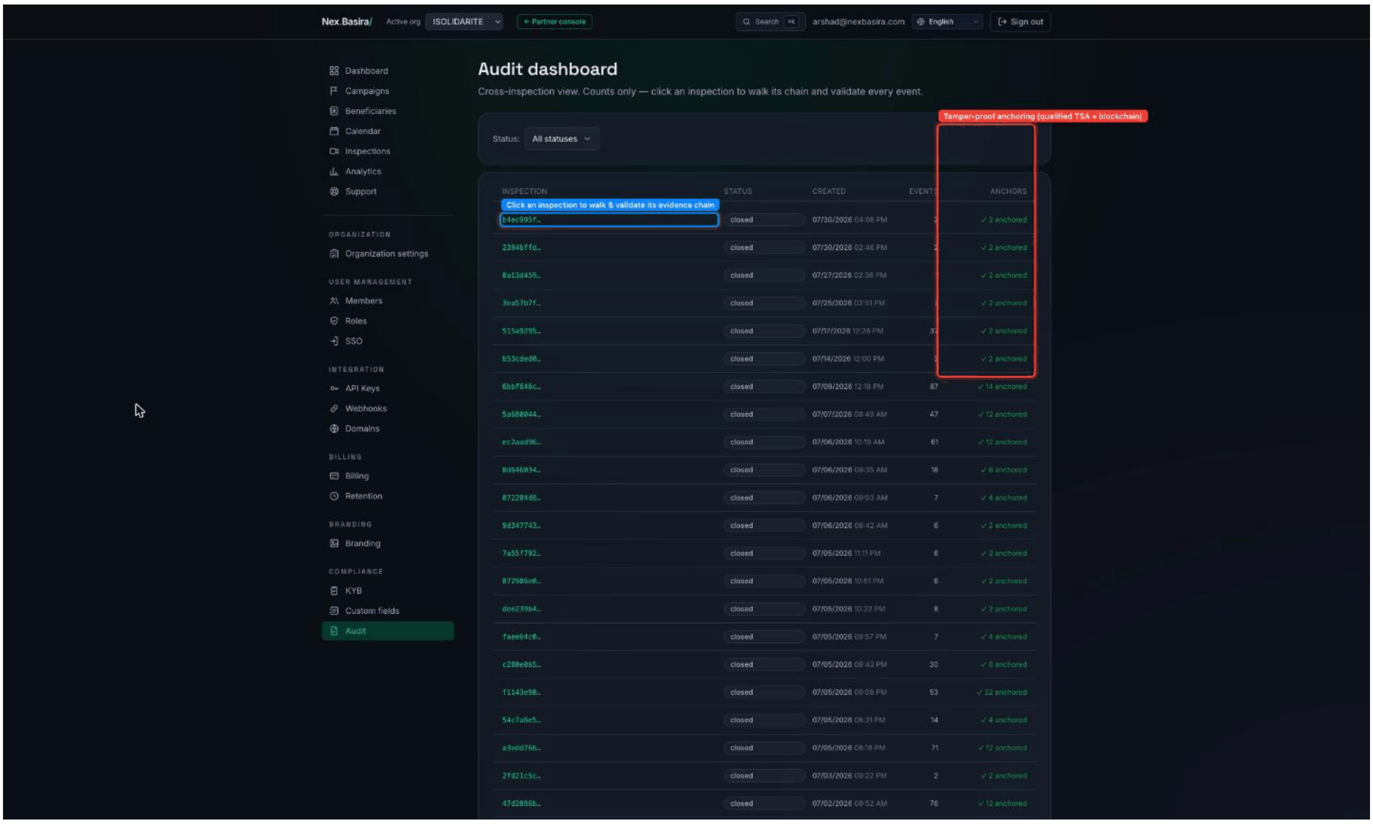
## 2.5 4. GDPR & compliance

NexBasira is built for regulated, evidence-grade inspections, so compliance is a first-class part of the product. Four tools, all in the **Compliance** and **Billing** sidebar groups.

### 2.5.1 The audit trail (Compliance → Audit)

Every inspection produces an **append-only, hash-chained** record of what happened, and each record is **anchored** — time-stamped with a qualified timestamp (eIDAS) and committed to a blockchain — so it can be proven tamper-free years later.




- The **ANCHORS** column shows `✓ N anchored` once an inspection's evidence has been sealed. This is your proof of integrity.
- Click any **inspection id** to open its **audit chain** and walk every event in order, validating each link — useful when a beneficiary, auditor, or regulator questions a file.
- Use the **Status** filter to narrow to open/closed inspections.

### 2.5.2 Data retention (Billing → Retention)

Set how long different kinds of data are kept before automatic clean-up (recordings, evidence, contact data). This is where you encode your legal retention policy so the platform enforces it for you rather than relying on manual deletion.

### 2.5.3 Right to erasure (GDPR)

When someone exercises their **right to be forgotten**, use **Erase** — available on a **member** row (Members) and on a **contact** (Contacts). Erase removes the person's personal data, as opposed to **Archive** (which only turns off access and keeps history).

> **Erase is irreversible.** It's specifically for genuine erasure requests. For "this person left the team", use **Archive** (reversible) instead.

### 2.5.4 Know Your Business (Compliance → KYB)

**KYB** verifies the businesses you inspect or onboard — EU **VAT (VIES)** validation, **sanctions screening** against official lists, and an attestation step. Run it from the KYB page and keep the result on file as part of your compliance evidence.

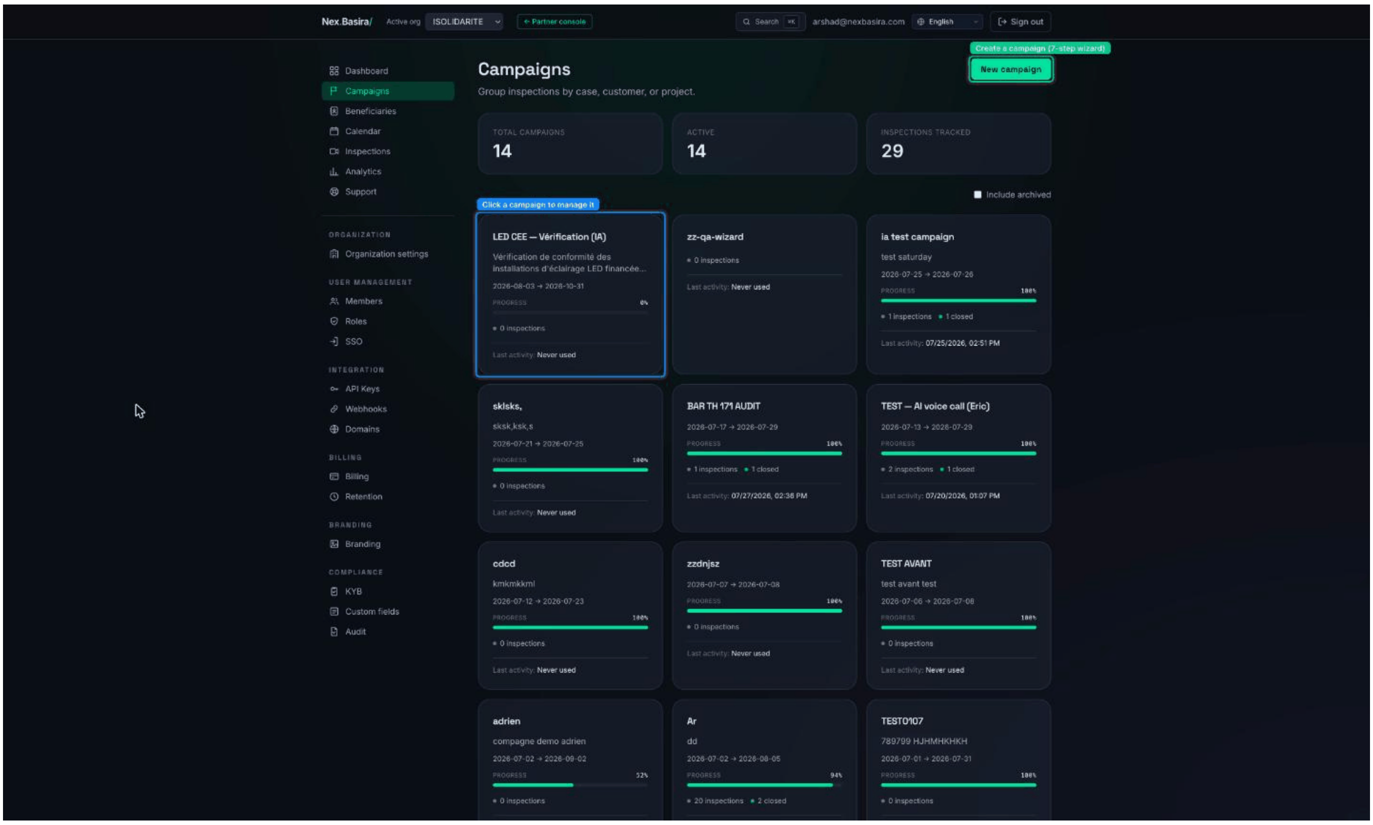
**Note.** KYB (verifying *your customers*) is separate from the Stripe merchant checks that verify *your own* organization for billing.

## 2.6 5. Campaign management

A **campaign** groups the people you need to inspect for one purpose (a batch of LED verifications, a water-consumption check, etc.) and drives how they're contacted and booked.

### 2.6.1 The campaigns list

Open **Campaigns** from the sidebar. Each card shows the campaign's dates, progress, and last activity; the tiles up top summarize totals.




- **New campaign** (top-right) opens the setup wizard.
- Click any **card** to open that campaign.
- Tick **Include archived** to also show archived campaigns.

### 2.6.2 Creating a campaign — the setup wizard

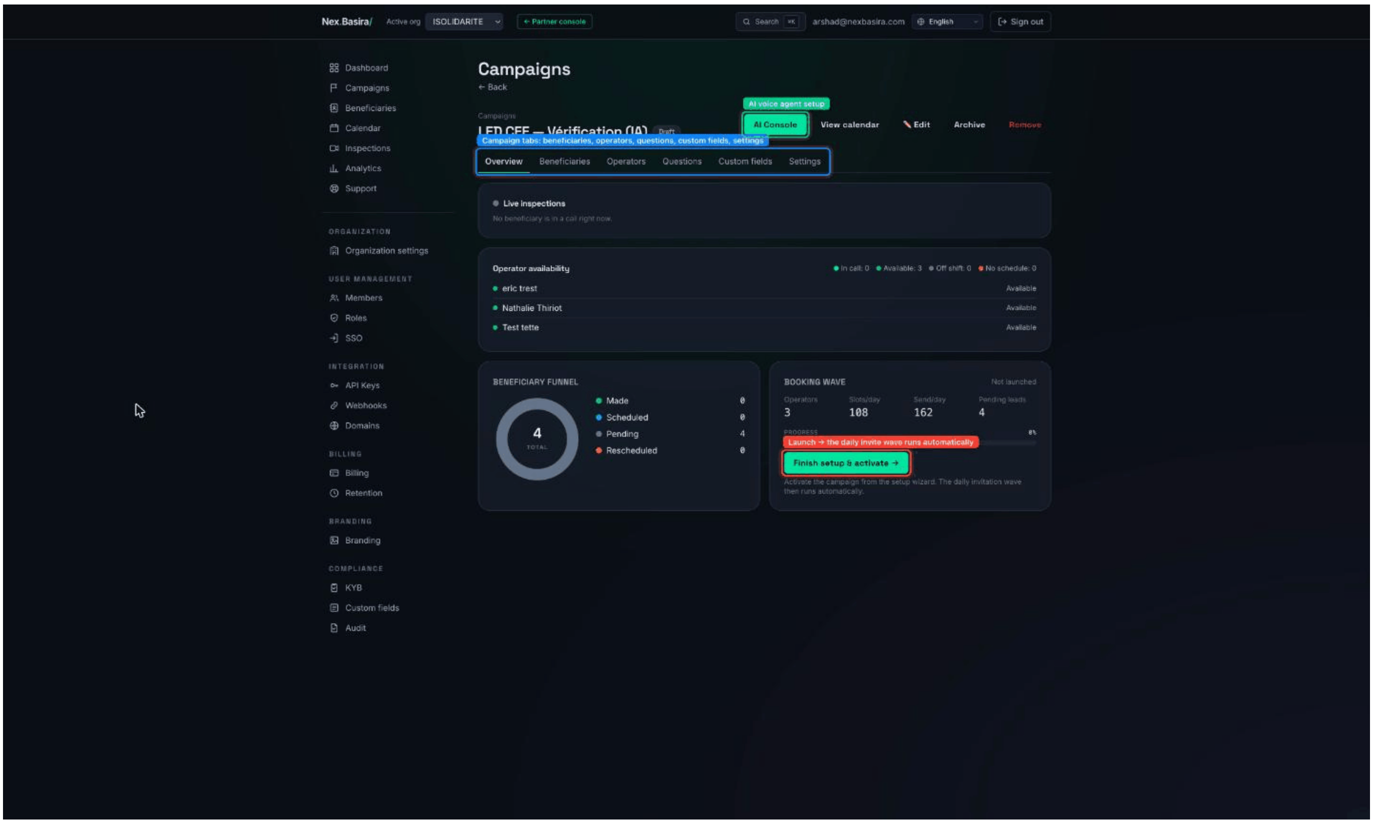
The wizard walks you through, in order:

1. **Details** — name, description, country, dates, time zone. This step also has the **"AI-assisted campaign (Smart Queue)"** checkbox: tick it to let the AI voice agent call and book beneficiaries automatically; leave it off for a manual campaign.
2. **Operators** — who runs the inspections (leave empty = any inspector with access).
3. **Custom fields** — extra per-beneficiary fields. **Define these before importing beneficiaries**: they become columns in the import template and variables the AI agent can use.
4. **Beneficiaries** — add the people to inspect (import a spreadsheet or add inline). See Beneficiary management.
5. **Questions** — a short questionnaire to collect during the inspection.
6. **Slot settings** — the appointment rhythm (slot length, breaks).
7. **Templates** — the invite/reminder/confirmation messages.
8. **Review** — **Activate** the campaign.

You can **Save as draft** at any step and finish later.

### 2.6.3 Managing a campaign

The detail page has a tab per area, plus action buttons.



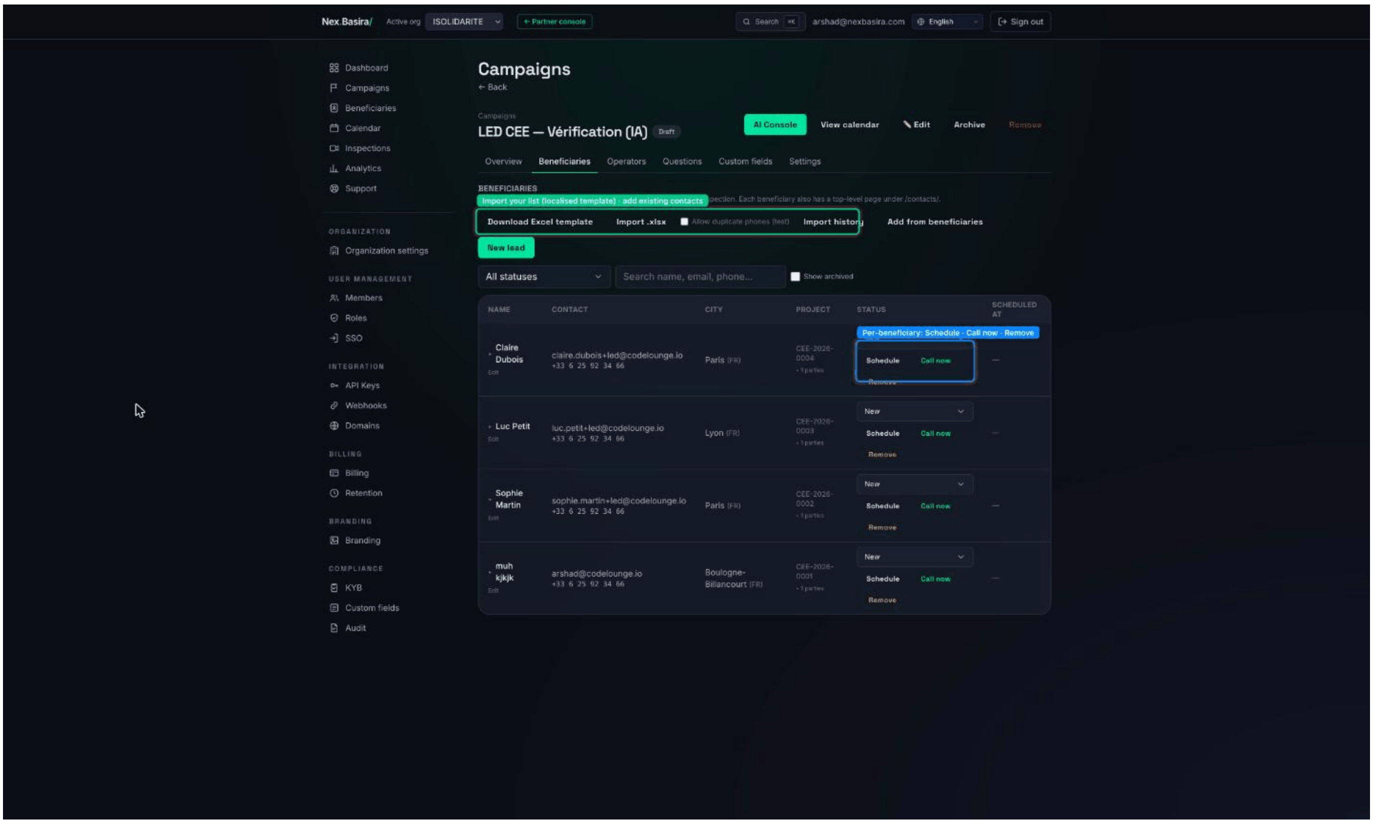

- **Tabs:** *Overview* (live funnel + booking wave), *Beneficiaries*, *Operators*, *Questions*, *Custom fields*, *Settings*.
- **Actions: AI Console** (voice-agent setup, AI campaigns only), **View calendar**, **Edit** (re-opens the wizard), **Archive**, **Remove**.
- **Booking wave** card shows operators, slots/day, sends/day, and pending leads.

### 2.6.4 Launching

- **Manual campaign:** hit **Finish setup & activate** (or *Activate* on the Review step). From then, the **daily invitation wave** runs automatically — each day it invites the next batch of beneficiaries to book. You can also push an extra batch now with **Send a wave**.
- **AI campaign:** open **AI Console**, configure the agent, then **Enrol contacts**. Enrolment seeds each contact's outreach sequence (intro SMS/email immediately, then AI calls on a cadence). Enrolling sends the first message right away, even while the campaign is a draft.

## 2.7 6. Beneficiary management

**Beneficiaries** are the people being inspected *within a campaign*. Each beneficiary is also a top-level Contact — the same person can be a beneficiary of several campaigns. Open a campaign → **Beneficiaries** tab.




### 2.7.1 Adding beneficiaries

Three ways:

1. **Download Excel template → fill → Import .xlsx.** The template already contains the right columns — including any campaign **custom fields** — and its headers come out **in the campaign's language** (a French campaign gets `Prénom`, `Téléphone (E.164)`, …). Fill it, then **Import .xlsx**. Import runs in the background; **Import history** shows the result and any row errors.
2. Tick **Allow duplicate phones (test)** only for testing, when several rows share one real number.
3. **Add from beneficiaries** — attach people who already exist as contacts in your org (no re-typing). Note: contacts attached this way start with **empty** custom fields — populate via import or the edit form.
4. **New lead** — add one person inline.

> **Tip.** Re-importing the same people with new custom-field values **backfills** those values onto the existing beneficiaries (matched by email/phone) — it won't create duplicates. Use this to fill fields you added after importing.

### 2.7.2 The list & statuses

Filter by **status** or search by name/email/phone; tick **Show archived** to include archived rows. Each row shows the person, city, project code, current **status**, and scheduled time.

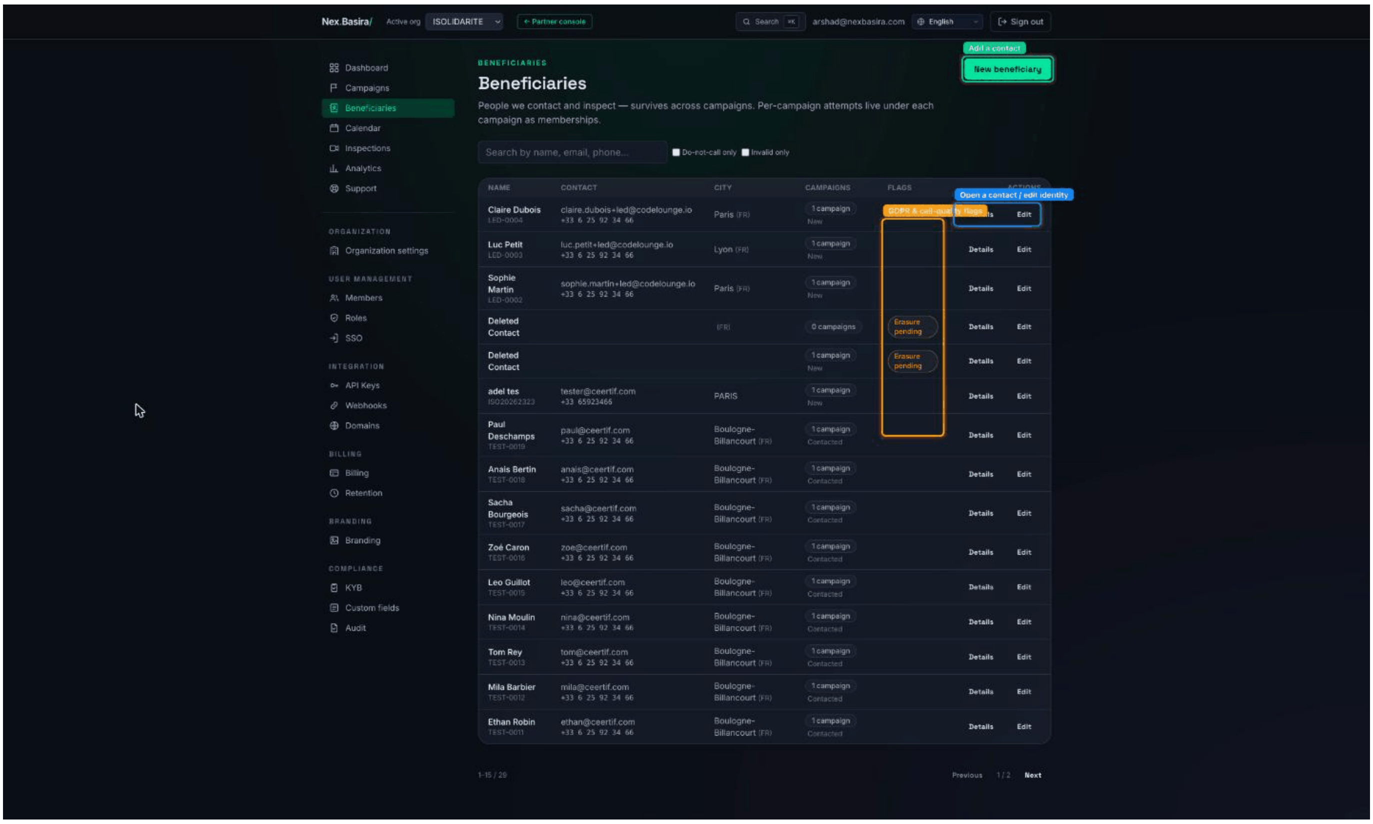
A beneficiary moves through statuses as work progresses — e.g. **New → Scheduled → (inspected) → closed** — and *Rescheduled*, *Cancelled*, etc. as needed. The Overview tab's **funnel** summarizes these counts.

### 2.7.3 Per-beneficiary actions

- **Schedule** — book an inspection appointment (offers real open slots).
- **Call now** — start an inspection **immediately** (rings the operator / opens the live session now).
- **Edit** — fix the person's identity (name, email, phone, city). This updates the underlying contact **across all campaigns**.
- **Remove** — take them out of this campaign (archivable/reversible).

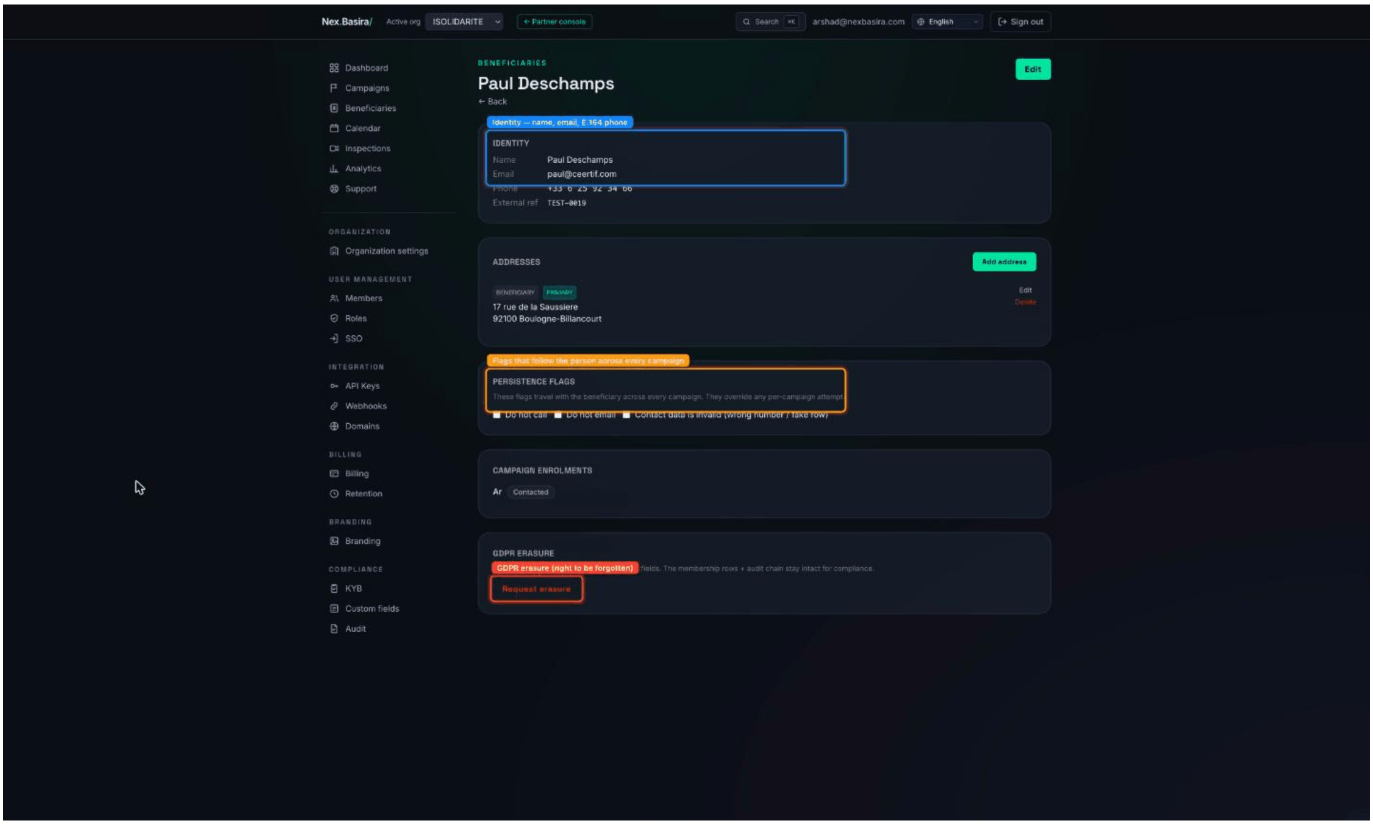
## 2.8 7. Contact management

A **contact** is a person in your organization's book. The same contact can be a beneficiary of several campaigns — the contact record **survives across campaigns**, while each campaign attempt lives under that campaign as a membership. Open **Beneficiaries** in the sidebar (this is your contacts book).




- **Search** by name, email, or phone; filter to **Do-not-call only** or **Invalid only**.
- The **FLAGS** column surfaces things like *Erasure pending*.
- **Details** opens the contact; **Edit** changes their identity; **New beneficiary** adds a person.

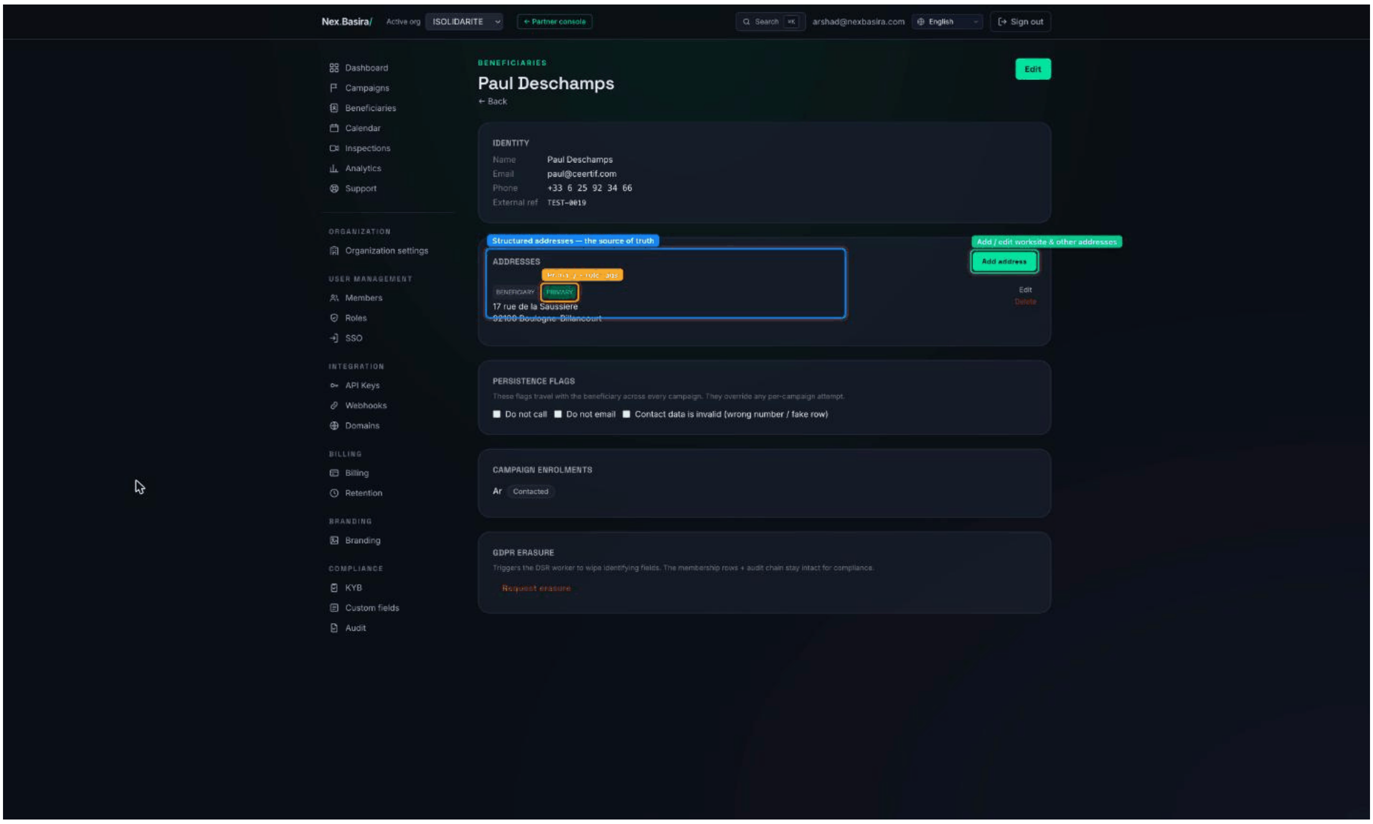
### 2.8.1 The contact detail




- **Identity** — name, email, **phone in E.164** ( `+33…` ), external reference. All phone numbers are stored and displayed in E.164 across the platform.
- **Persistence flags — Do not call**, **Do not email**, **Contact data is invalid**. These **follow the person across every campaign** and override any per-campaign attempt, so setting *Do not call* here stops all outreach everywhere.
- **Campaign enrolments** — every campaign this person belongs to, with status.
- **GDPR erasure — Request erasure** triggers the data-subject-request worker to wipe identifying fields. The membership rows and the audit chain are deliberately **kept** (anonymized) so your compliance record stays intact.

## 2.9 8. Address management

Addresses are **structured** and are the **source of truth** for where an inspection takes place. Manage them from the **Addresses** block on the contact detail.




- **Add address** — add a worksite or other address; **Edit/Delete** manage existing ones.
- Each address carries **tags**: **PRIMARY** (the main one) and role tags such as **BENEFICIARY**, so the platform knows which address the inspection concerns.
- The worksite address drives the on-site checks — for example, the inspection report **reverse-geocodes the GPS fix** captured during the video call and cross-checks it against this address, flagging a mismatch if the person isn't where they should be.

**Why structured, not a free-text line?** Structured addresses let NexBasira map, geocode, and verify locations reliably. The flat address you may see on a quick create form is a mirror of this structured record.

## 2.10 9. Direct control (live inspection sessions)

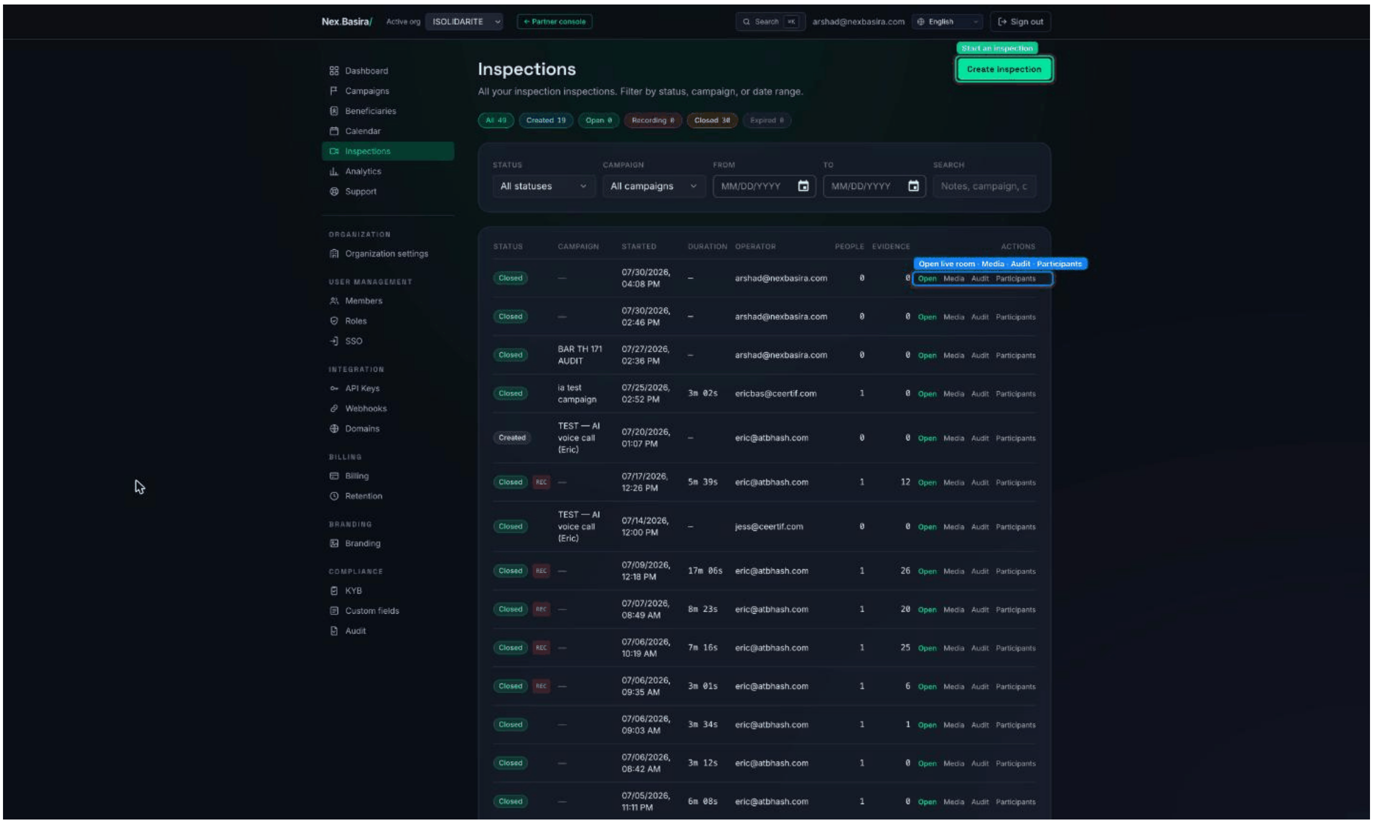
The **inspection** is the heart of NexBasira: a short video call where the beneficiary shows their situation and an **operator (controller)** verifies it live while evidence is captured and sealed.

### 2.10.1 Starting an inspection

- **Scheduled** — the beneficiary booked a slot (via an invite or the AI agent); it starts at the appointed time.
- **Now** — from a campaign's **Beneficiaries** tab, **Call now** starts one immediately; **Create inspection** (on the Inspections page) does the same ad-hoc.
- A **live presence board** shows who has joined; you're alerted when a beneficiary arrives so an operator can pick them up right away.

### 2.10.2 Following inspections

Open **Inspections** in the sidebar. Filter by status and campaign; the status chips (**Created → Open → Recording → Closed**) track each one's lifecycle.




Each row's actions:

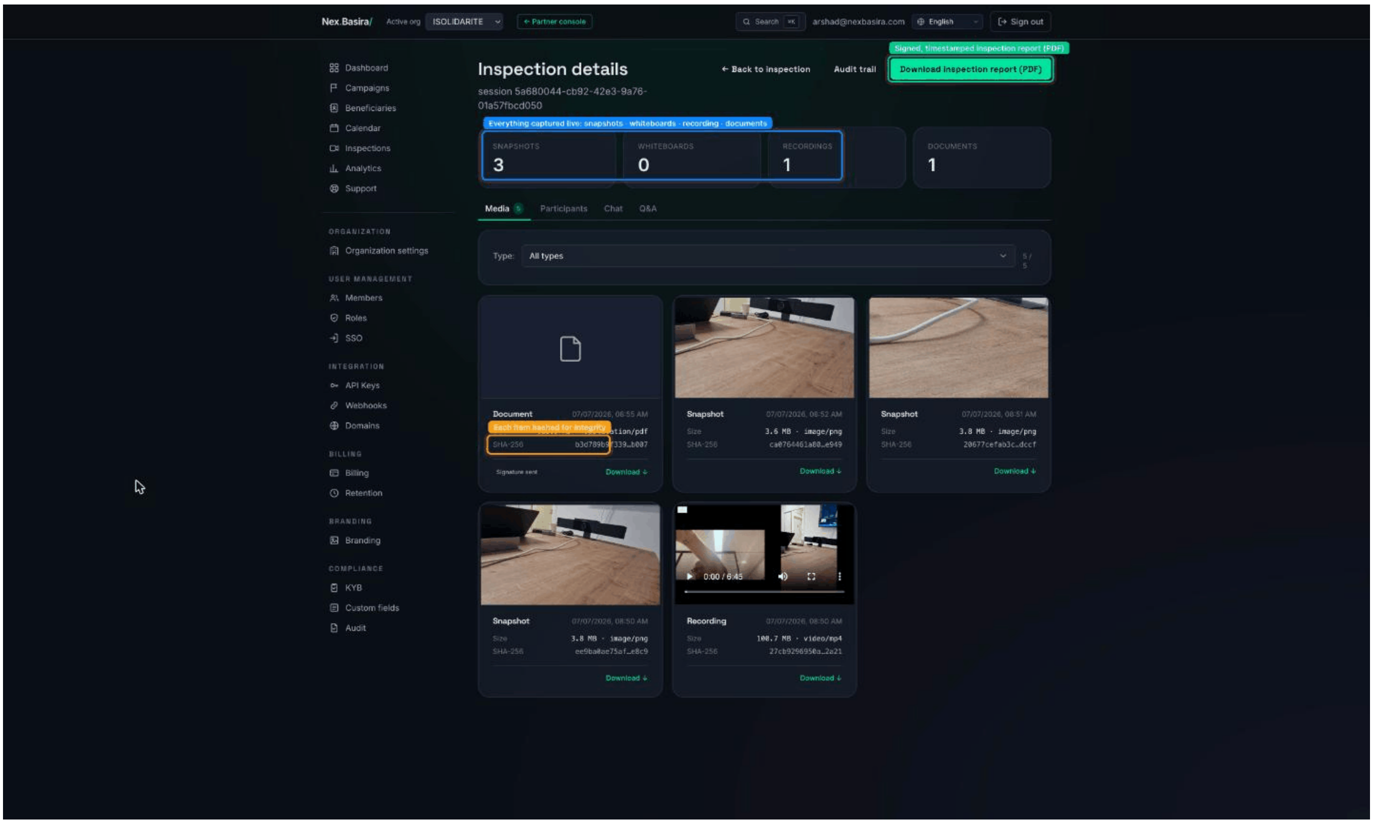
- **Open** — enter the live room (to run or observe the session).
- **Media** — the captured evidence + report (below).
- **Audit** — walk the tamper-proof evidence chain (see §4).
- **Participants** — who was in the call.

### 2.10.3 During the call

The operator drives a **Meet-style** room: live video, an in-session **chat** (the primary workspace), and evidence tools — **snapshots**, a **whiteboard / annotator**, and a full-call **recording**. Location (GPS) is captured for the report's on-site cross-check. A short **Q&A** can be collected too.

### 2.10.4 After the call — evidence & report

Everything captured lands on the inspection's **Media / details** page.




- Tiles summarize **snapshots, whiteboards, recordings, documents**; tabs switch between **Media / Participants / Chat / Q&A**.
- Every item shows its **size and SHA-256 hash** and can be **downloaded**.
- **Download inspection report (PDF)** produces the **signed, timestamped** report (available in every supported language). The **Audit trail** button walks the evidence chain.

This is what makes a NexBasira inspection *evidence-grade*: the beneficiary is verified live by a human, every artifact is hashed, and the whole thing is anchored (qualified timestamp + blockchain) so it can be proven authentic long after the call.

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*You've reached the end of the Organization guide. See also the Operator and Reseller guides.*

# 3. Operator guide

For **inspectors / operators** — the people who run the live video inspections. Your job is simple: pick up the next beneficiary, verify their situation on a short video call, capture the evidence, and finish. The platform handles the scheduling, the queue, and the paperwork.

## 3.1 Contents



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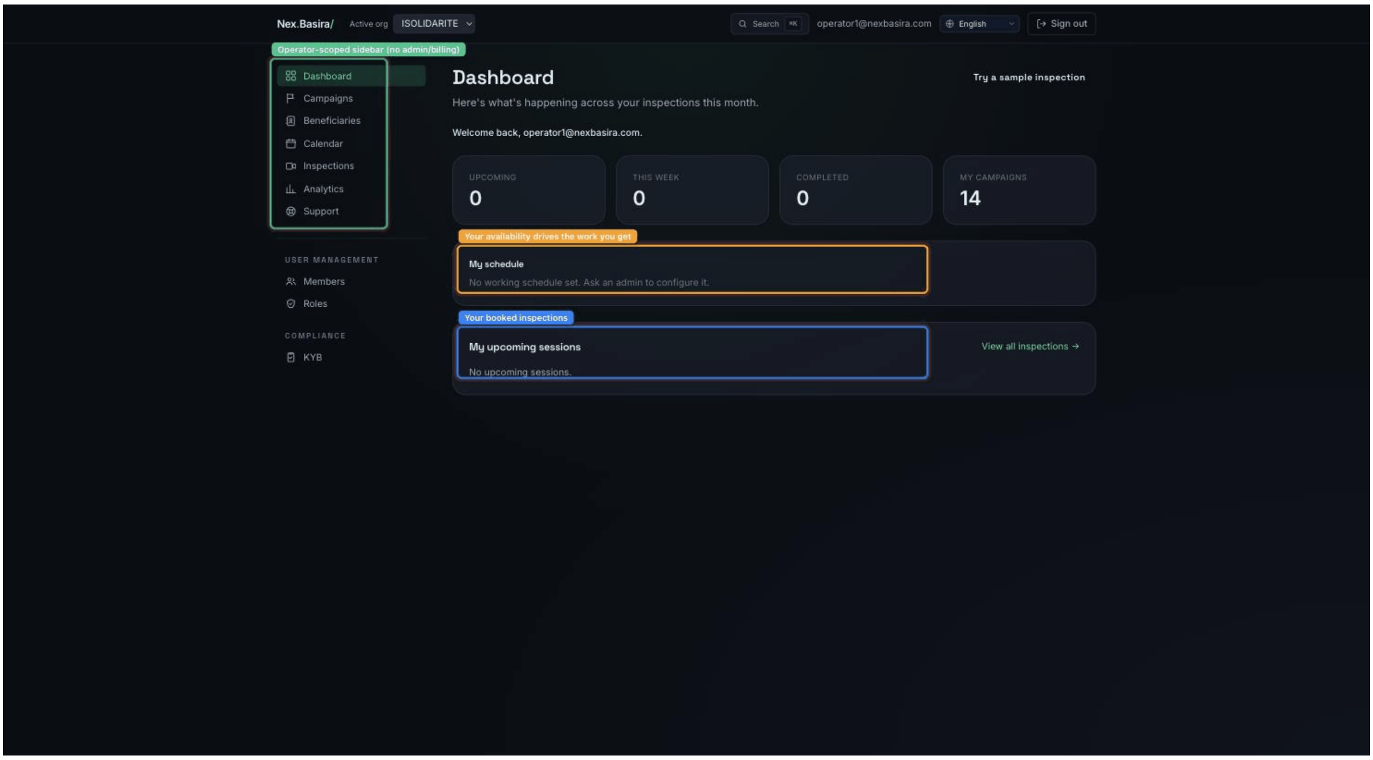
## 3.2 1. What you see

As an operator your view is **scoped to your own work**. The sidebar shows only what you need — your **Dashboard**, **Campaigns** you're assigned to, **Beneficiaries**, **Calendar**, **Inspections**, and **Support**. Admin areas (members, billing, roles, integrations) are hidden — that's expected.




Your **availability** (set by your admin as a weekly schedule in your own time zone) decides when the system routes work to you: **Available** when you're on shift, **Off shift** outside your hours. If you're marked **No schedule**, ask your admin to set your hours or you won't be offered automatic work.

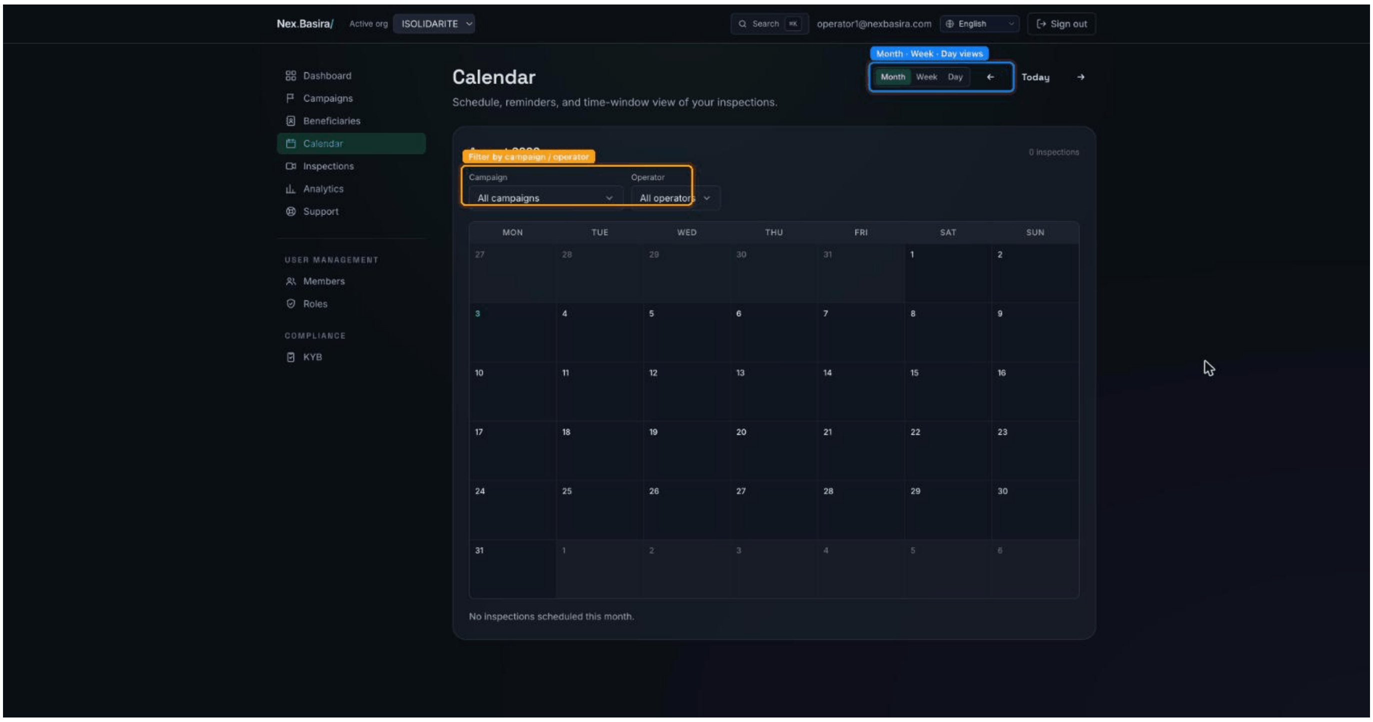
## 3.3 2. Your queue (Smart Queue)

For AI-assisted campaigns, the **Smart Queue** ranks the beneficiaries who are ready to be called and hands you **the next best one** — you don't pick manually.

- Open the queue and press **Next** (or "Take next") to be assigned the highest-priority eligible beneficiary and jump straight into contacting them.
- The queue respects **capacity** (it won't overload you) and **eligibility** (skips do-not-call, wrong-number, already-handled, and out-of-hours contacts).
- Ranking favors people who've been waiting, are on-site/ready, or are more likely to convert — so you always work the most valuable contact first.

## 3.4 3. Your calendar

The **Calendar** shows **your** booked inspections. Switch between **Month**, **Week**, and **Day** views; each entry links to the beneficiary and, when it's time, to the live room. Filter by campaign or operator.




## 3.5 4. Getting a beneficiary on the call

Three ways a beneficiary reaches your screen:

1. **Scheduled** — at the appointment time, open the inspection from your calendar or the Inspections list and start the room.
2. **They just joined** — when a beneficiary opens their video link, a **live presence board** lights up and you get an **alert** (email/SMS). Pick them up with **Call now** so they don't wait.
3. **Call now (immediate)** — from a campaign's beneficiaries, start an inspection on the spot.

> **Remember:** an answered phone call (by the AI agent) is **not** a handoff to you. The beneficiary must open the secure video link and allow camera/mic — *then* you join and run the check.

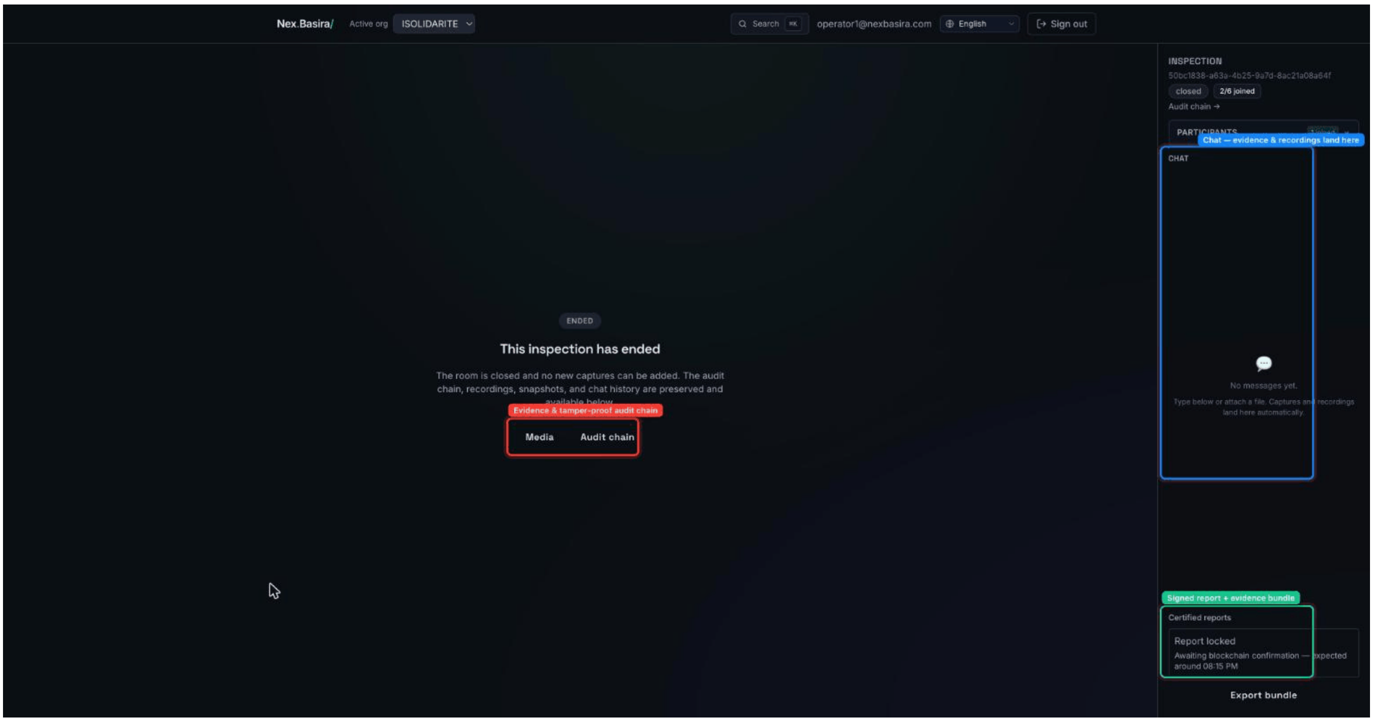
## 3.6 5. Running the inspection

The live room is **Meet-style**: video of the beneficiary, with your tools on the side. The **chat** is your main workspace — instructions, links, and a running record all live there.

Your evidence tools:

- **Snapshot** — grab a still from the video; it's stored as timestamped evidence (and you can immediately open the **annotator** to circle/mark it).
- **Whiteboard / annotator** — draw over a frame to point things out.
- **Recording** — the call is recorded for the file.
- **Location** — the beneficiary's GPS is captured for the report's on-site cross-check.
- **Questions (Q&A)** — record answers to the campaign's questionnaire.

Everything you capture is hashed and anchored automatically — you don't manage any of that.

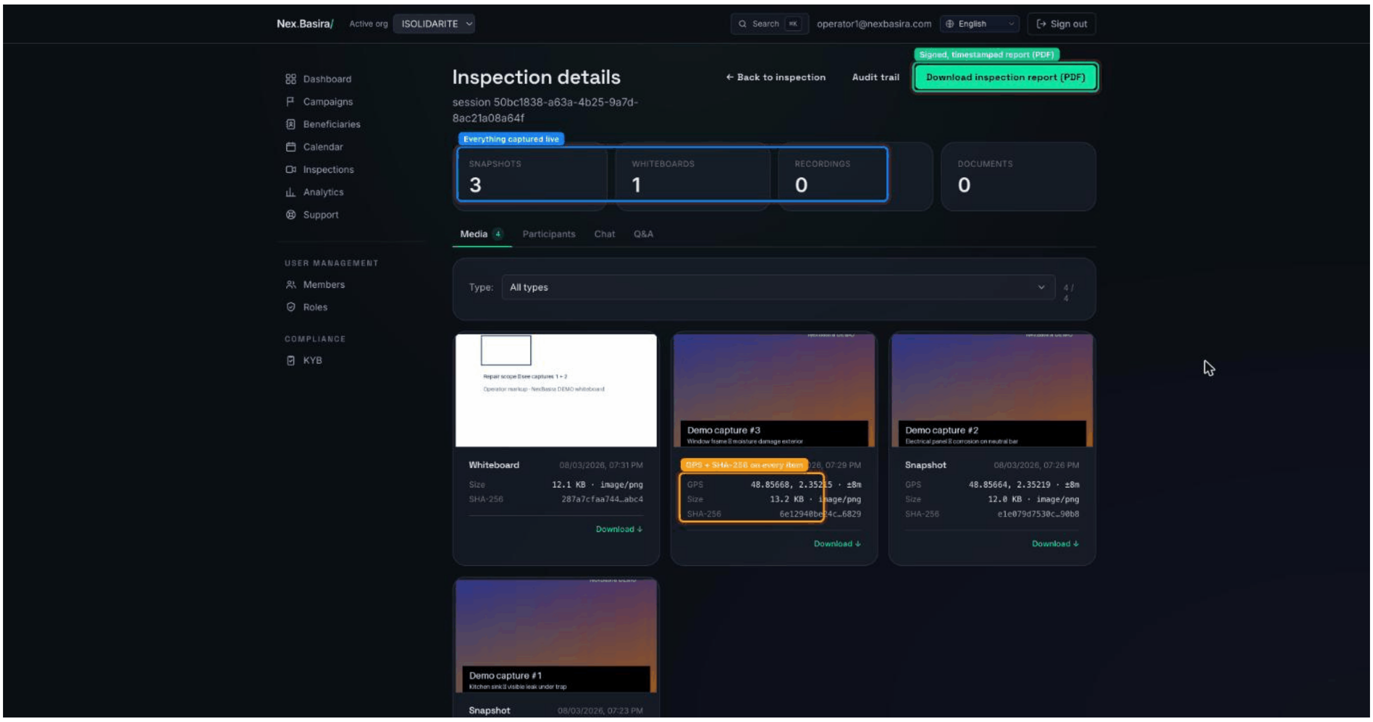



## 3.7 6. Signatures

When a document needs signing (e.g. an attestation), start the **signature** flow from the chat. The signer gets a secure link, signs, and the signed PDF comes back into the chat as a signature card — no email juggling, and the whole thing is timestamped.

## 3.8 7. Finishing & the report

When the verification is done, close the inspection. Everything you captured — snapshots, recording, documents, answers — lands on the inspection's **Media** page, each item with its **SHA-256 hash**, and the **signed, timestamped report (PDF)** can be downloaded there. Once evidence is anchored, the file is tamper-proof.




*See also the Organization guide for how campaigns, beneficiaries and schedules are set up for you.*

# 4. Reseller / Partner guide

For **partners who resell NexBasira** to their own customers. You get a dedicated **Partner console** (a **PARTNER** badge appears in the header) where you onboard client organizations, track what you earn, manage your team, and open any client's account to help them.

Enter it from the **← Partner console** link in the top bar.

## 4.1 Contents



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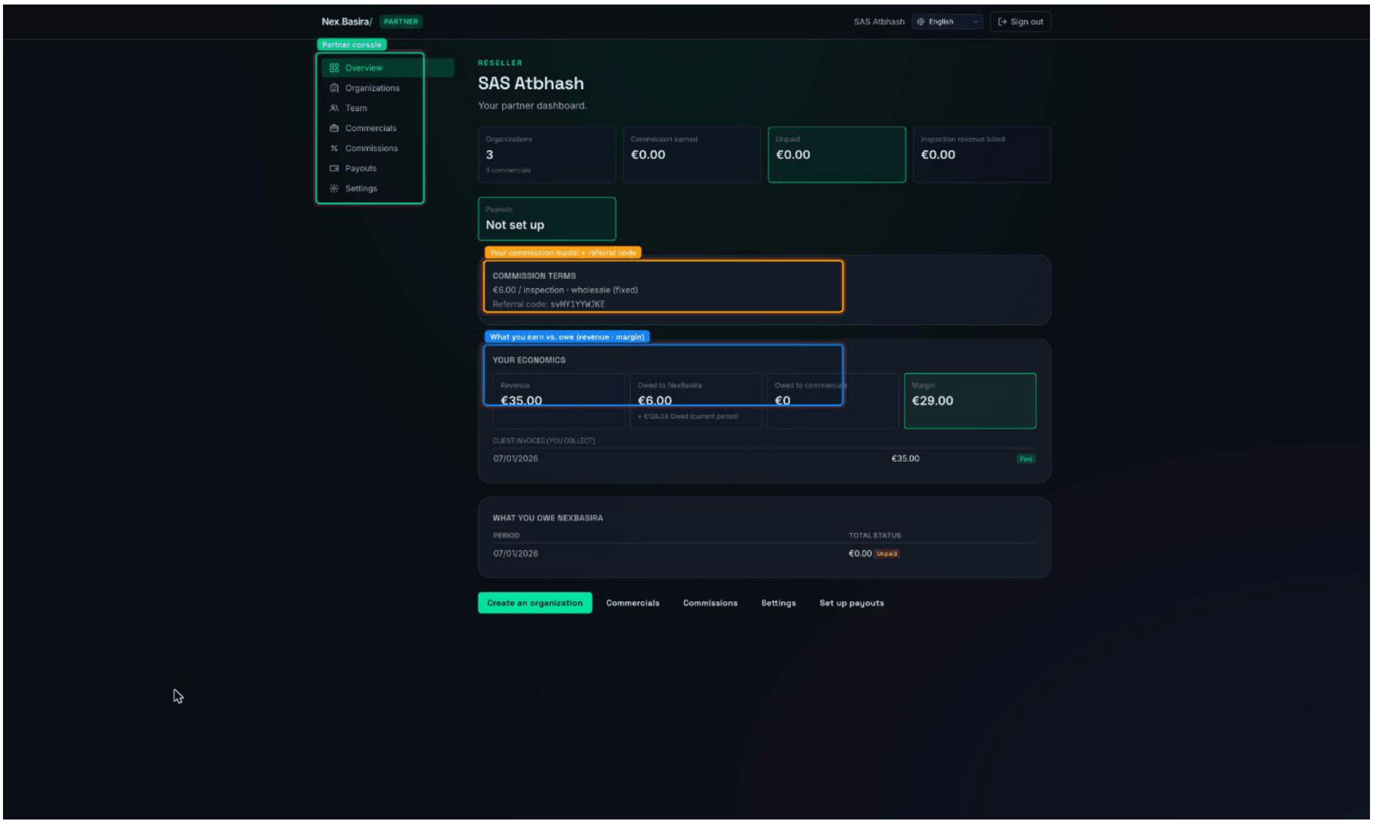
## 4.2 1. The partner dashboard

The **Overview** page is your at-a-glance business: how many organizations you manage, commission earned, what's unpaid, and your economics for the period.

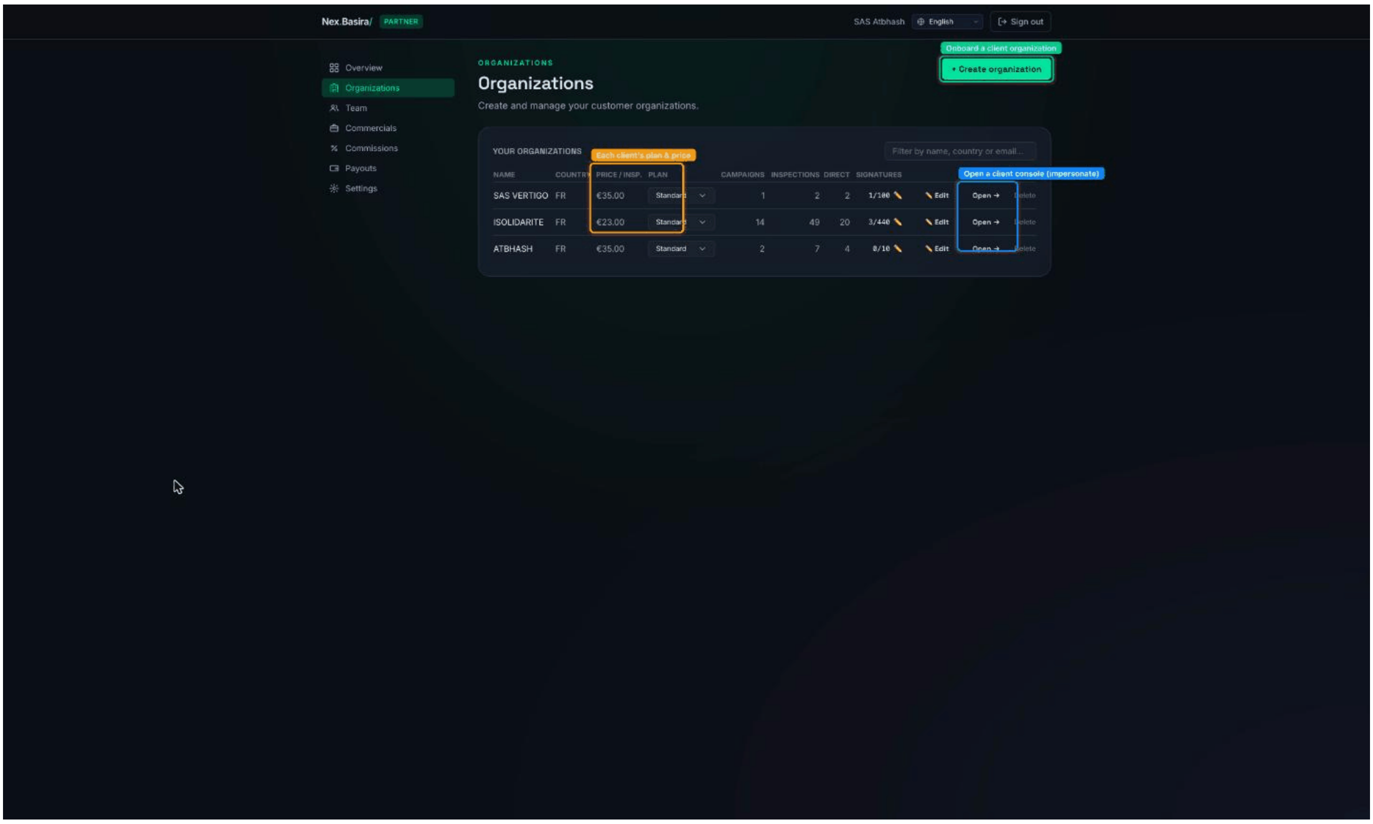



- **Tiles** — organizations, commission earned, unpaid, inspection revenue billed, and payout status.
- **Commission terms** — your model and rate (e.g. *€6.00 / inspection · wholesale (fixed)*) plus your **referral code**.
- **Your economics** — **Revenue** (what you invoice clients), **Owed to NexBasira**, **Owed to commercials**, and your **Margin**. Below it, **Client invoices (you collect)** and **What you owe NexBasira** per period.

**Two commission models exist:** *percentage* (you earn a cut and NexBasira bills the client) and *wholesale/fixed* (you buy at a wholesale rate and bill the client yourself). Your terms card tells you which one you're on.

## 4.3 2. Your organizations

The **Organizations** page is your client book — create and manage the organizations you resell to.




- **+ Create organization** — onboard a new client (name, country, contacts, plan).
- Per row: the client's **plan** and **price / inspection**, live **campaigns / inspections / direct / signatures** counts, and **Edit / Open → / Delete**.
- **Delete** soft-deletes the client from your book — it cancels their subscription and stops commission. It's reversible with support, but treat it as "offboard this client".

## 4.4 3. Opening a client's console

**Open →** on any organization launches **that client's own console** — you're now working inside their account (impersonation) to set up campaigns, fix something, or give a demo.

- The session is **scoped and time-limited**, and **every action is audit-logged** against you, so the client has a clear record.
- Platform-only screens stay blocked while you're impersonating.
- Leave the client console to return to your Partner console.

You're acting **as the client** while their console is open. Anything you change (a campaign, a beneficiary, a message send) is real for them.

## 4.5 4. Team & roles

The **Team** page lets you invite colleagues into your Partner console with a role that limits what they can do:

- **Administrator** — full partner access.
- **Manager** — manage organizations and clients; no billing/payout control.
- **Billing** — commissions, payouts and invoices only.

Invited team members get an email → set a password → they're in. Every partner endpoint is gated by these roles.

**Commercials** (on their own page) are your sub-agents/referrers — people who bring you clients and earn a slice; the Overview's *Owed to commercials* tracks what you owe them.

## 4.6 5. Commissions & payouts

- **Commissions** — the running detail of what you've earned per client and period, and what NexBasira has billed.
- **Payouts** — set up how you get paid (shown as *Not set up* until you configure it). Adding or changing bank/payout details is a sensitive change — do it yourself in the payout setup; support won't enter these for you.
- **Settings** — your partner profile and defaults.