

NexBasira — How to use

Role-based guides for the remote-inspection platform

None

None

Table of contents

1. NexBasira — How to use the platform	3
1.1 The big picture	3
2. Organization guide	4
2.1 Contents	4
2.2 1. Getting oriented	4
2.3 2. Members & roles	5
2.4 3. Operators & schedules	6
2.5 4. GDPR & compliance	8
2.6 5. Campaign management	9
2.7 6. Beneficiary management	11
2.8 7. Contact management	13
2.9 8. Address management	14
2.10 9. Direct control (live inspection sessions)	15
3. Operator guide	18
3.1 Contents	18
3.2 1. What you see	18
3.3 2. Your queue (Smart Queue)	19
3.4 3. Your calendar	19
3.5 4. Getting a beneficiary on the call	19
3.6 5. Running the inspection	20
3.7 6. Signatures	20
3.8 7. Finishing & the report	20
4. Reseller / Partner guide	22
4.1 Contents	22
4.2 1. The partner dashboard	22
4.3 2. Your organizations	23
4.4 3. Opening a client's console	24
4.5 4. Team & roles	24
4.6 5. Commissions & payouts	25

1. NexBasira — How to use the platform

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

Guide	Who it's for	What it covers
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

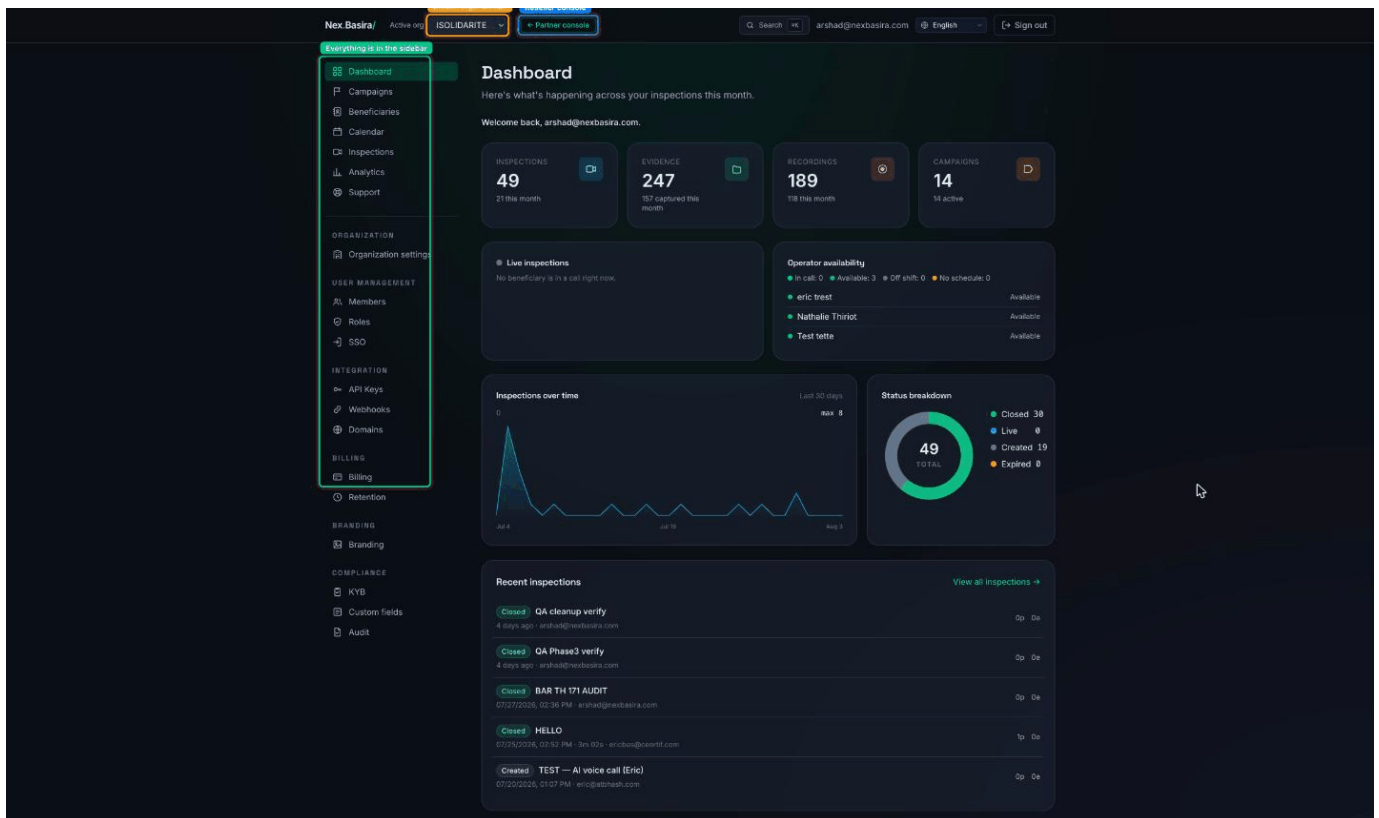
1. [Getting oriented](#)
 2. [Members & roles](#)
 3. [Operators & schedules](#)
 4. [GDPR & compliance](#)
 5. [Campaign management](#)
 6. [Beneficiary management](#)
 7. [Contact management](#)
 8. [Address management](#)
 9. [Direct control \(live inspection sessions\)](#)
-

2.2 1. Getting oriented

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

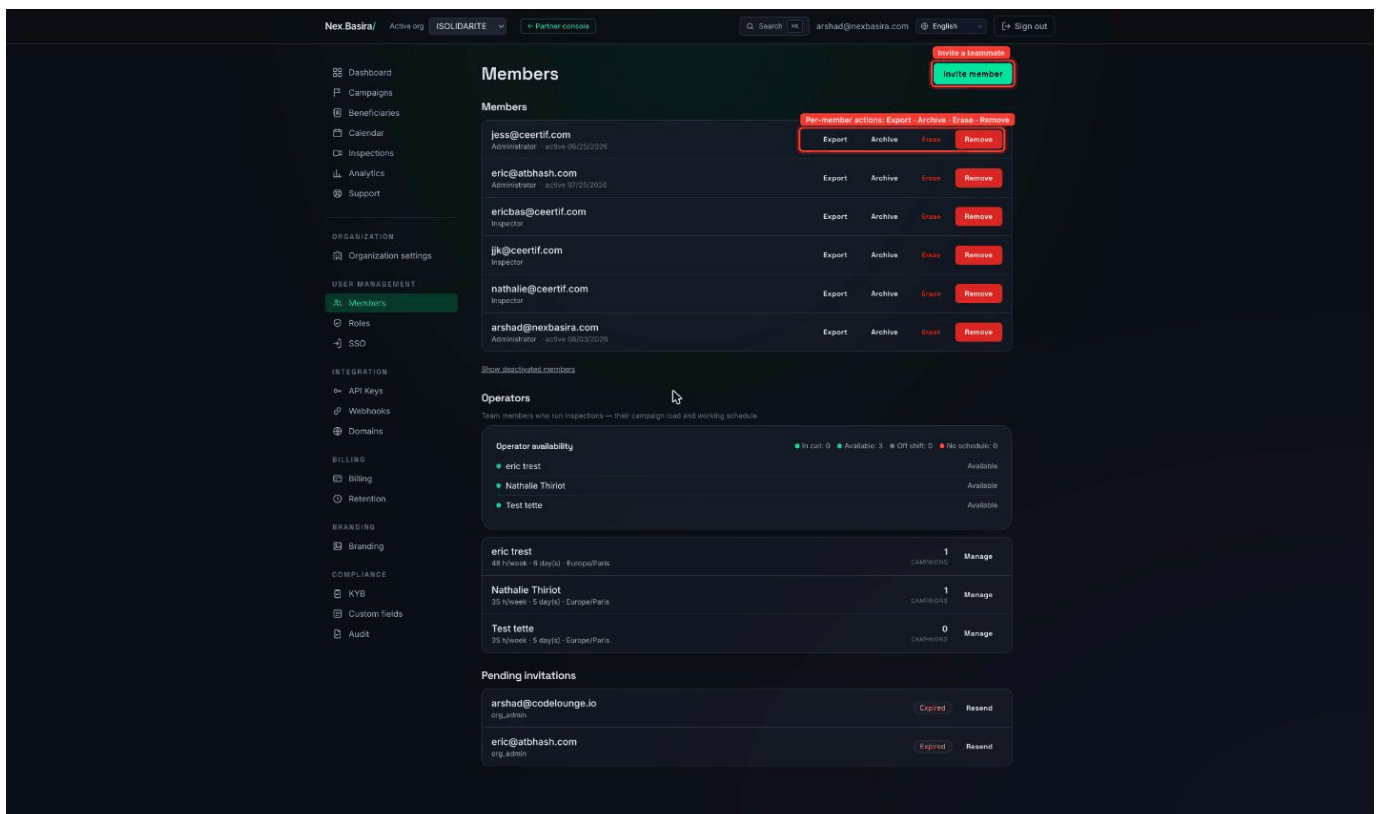
- **Active org** — if you belong to more than one organization, switch here. Everything you see (members, campaigns, beneficiaries) is scoped to the selected org.
- **Search** (🔍) — jump to any campaign, beneficiary, or contact.
- **Partner console** — only visible to resellers; see the [Reseller guide](#).

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.

The screenshot displays the Nex.Basira interface. On the left is a sidebar with navigation options: Dashboard, Campaigns, Beneficiaries, Calendar, Inspections, Analytics, Support, ORGANIZATION (Organization settings), USER MANAGEMENT (Members, Roles, SSO), INTEGRATION (API Keys, Webhooks, Domains), BILLING (Billing, Retention), BRANDING (Branding), and COMPLIANCE (KYB, Custom fields, Audit). The main content area is titled 'Members' and includes a 'Invite member' button. Below this is a table of members with columns for email, role, status, and actions (Export, Archive, Error, Remove). The 'Operators' section follows, featuring a 'Live availability board' with a legend: In call (green dot), Available (blue dot), Off shift (orange dot), and No schedule (red dot). The board lists operators: eric trest (Available), Nathalie Thiriot (Available), and Test tette (Available). Below the board, a table lists operators with their weekly hours, days, location, and campaign counts, each with a 'Manage' button. The 'Pending invitations' section at the bottom shows two pending invites with 'Expired' and 'Resend' buttons.

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).

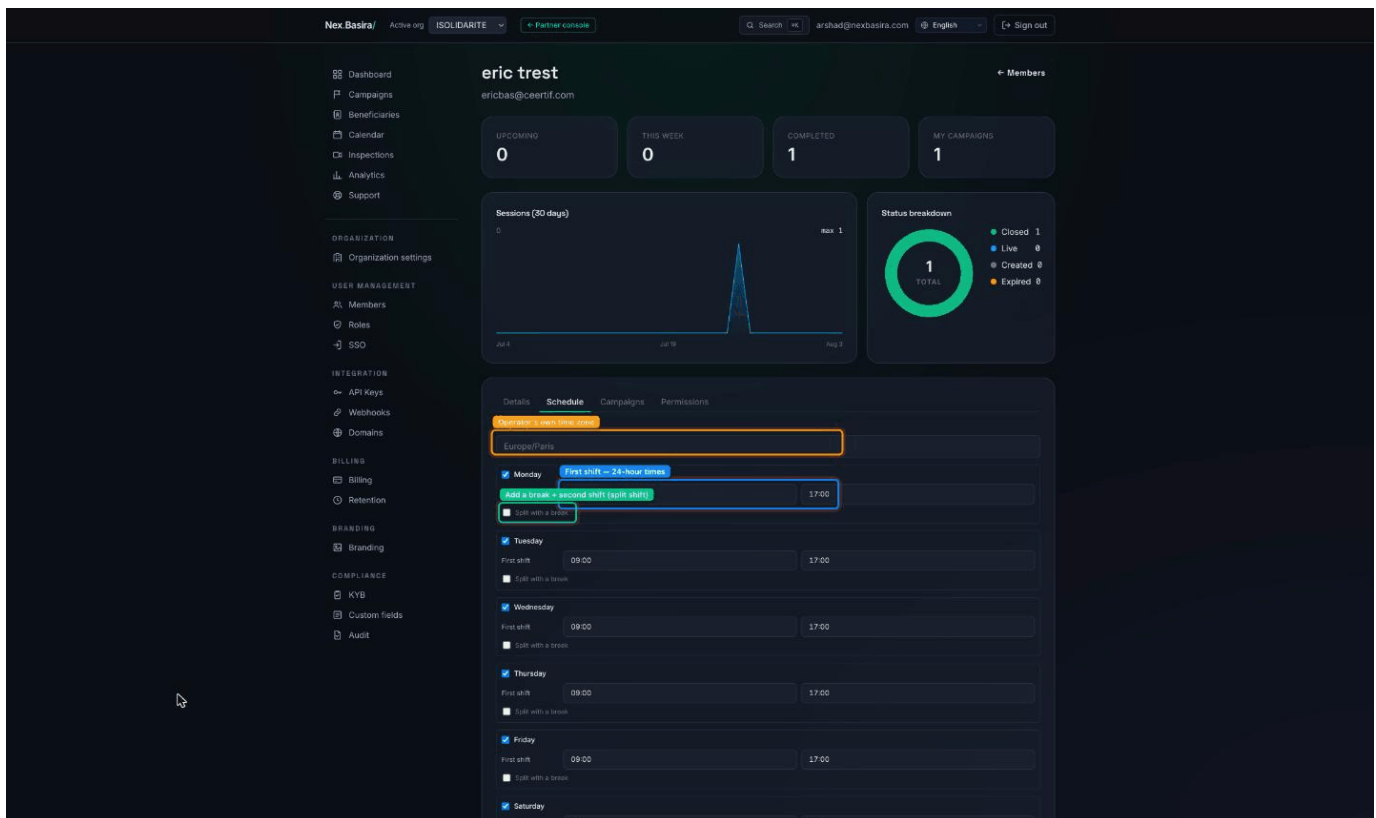
2.4.2 Reading the operator rows

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.

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.

Audit dashboard
Cross-inspection view. Counts only — click an inspection to walk its chain and validate every event.

Status: All statuses

INSPECTION	STATUS	CREATED	EVENT	ANCHORS
61ec9957...	closed	07/30/2028 04:08 PM		✓ 2 anchored
23946f1d...	closed	07/30/2028 02:46 PM		✓ 2 anchored
8a13a439...	closed	07/27/2028 02:38 PM		✓ 2 anchored
3ev57b71...	closed	07/25/2028 02:38 PM		✓ 2 anchored
515a9295...	closed	07/07/2028 12:38 PM	15	✓ 2 anchored
853c0a8b...	closed	07/04/2028 12:00 PM		✓ 2 anchored
60a7e44c...	closed	07/08/2028 12:18 PM	87	✓ 14 anchored
5a588a4c...	closed	07/07/2028 08:49 AM	47	✓ 12 anchored
ec2a0d96...	closed	07/06/2028 10:19 AM	81	✓ 12 anchored
8094a934...	closed	07/05/2028 09:35 AM	18	✓ 4 anchored
8728846c...	closed	07/06/2028 09:03 AM	7	✓ 4 anchored
9d347743...	closed	07/06/2028 06:42 AM	6	✓ 2 anchored
7a55f792...	closed	07/05/2028 11:11 PM	6	✓ 2 anchored
872985a6...	closed	07/05/2028 10:53 PM	6	✓ 2 anchored
d6e23994...	closed	07/05/2028 10:22 PM	8	✓ 2 anchored
face64c6...	closed	07/05/2028 09:57 PM	7	✓ 4 anchored
c28b0b55...	closed	07/05/2028 09:43 PM	30	✓ 8 anchored
f1143e96...	closed	07/05/2028 09:09 PM	53	✓ 22 anchored
54c7a6e5...	closed	07/05/2028 08:31 PM	14	✓ 4 anchored
a3e0d796...	closed	07/05/2028 08:18 PM	11	✓ 12 anchored
2f421c5c...	closed	07/03/2028 09:22 PM	2	✓ 2 anchored
47d2886b...	closed	07/03/2028 08:52 AM	76	✓ 12 anchored

- 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.

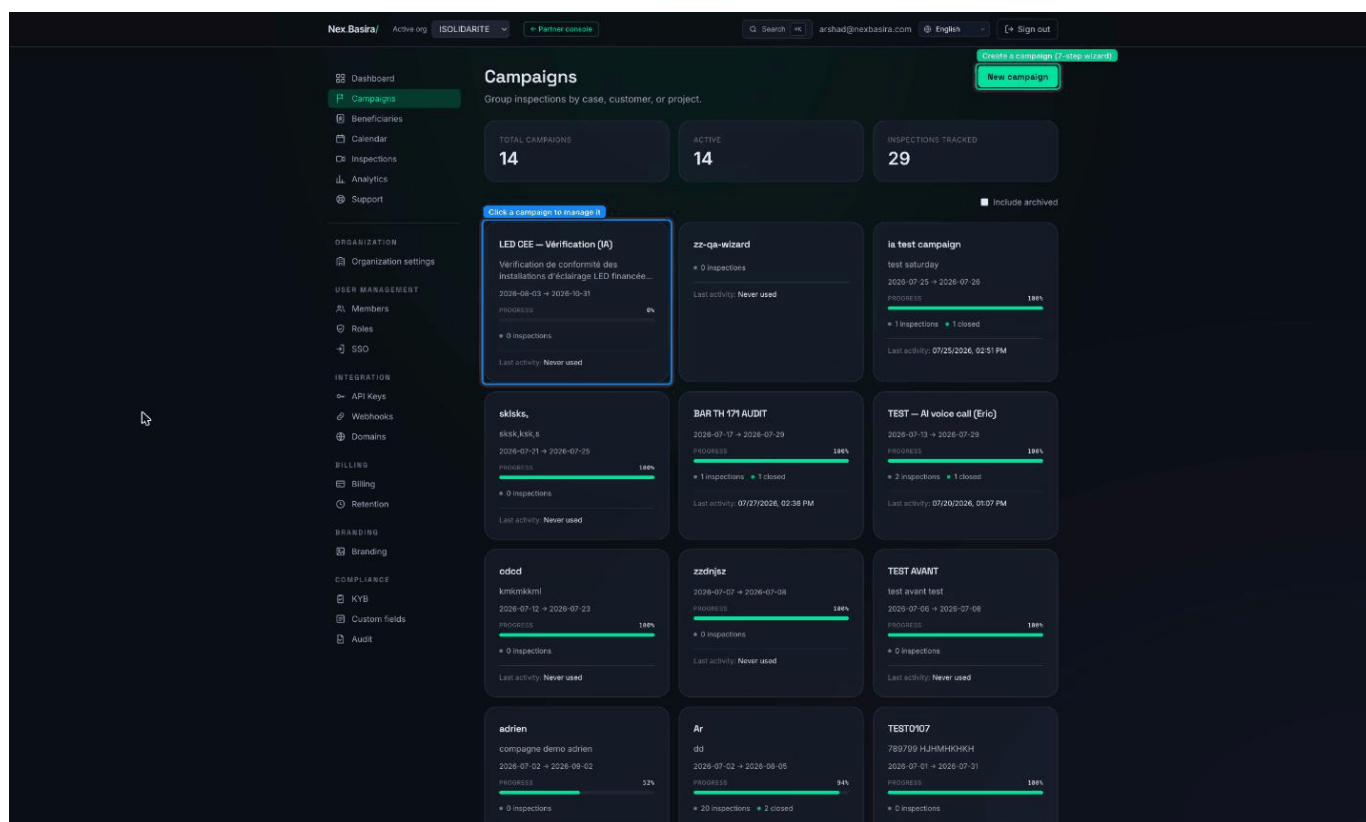
Note. KYB (verifying *your customers*) is separate from the Stripe merchant checks that verify *your own* organization for billing.

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

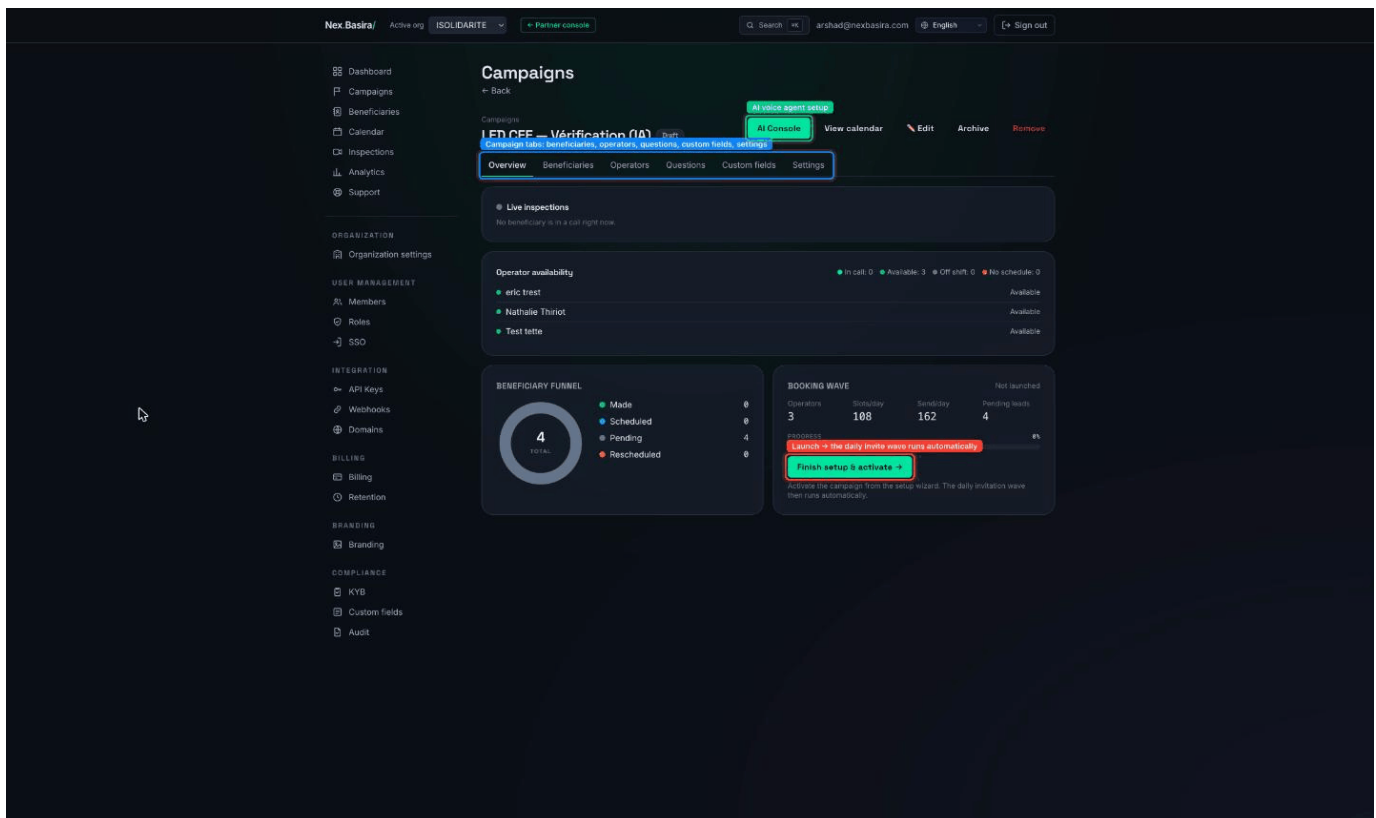
The wizard walks you through, in order:

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.



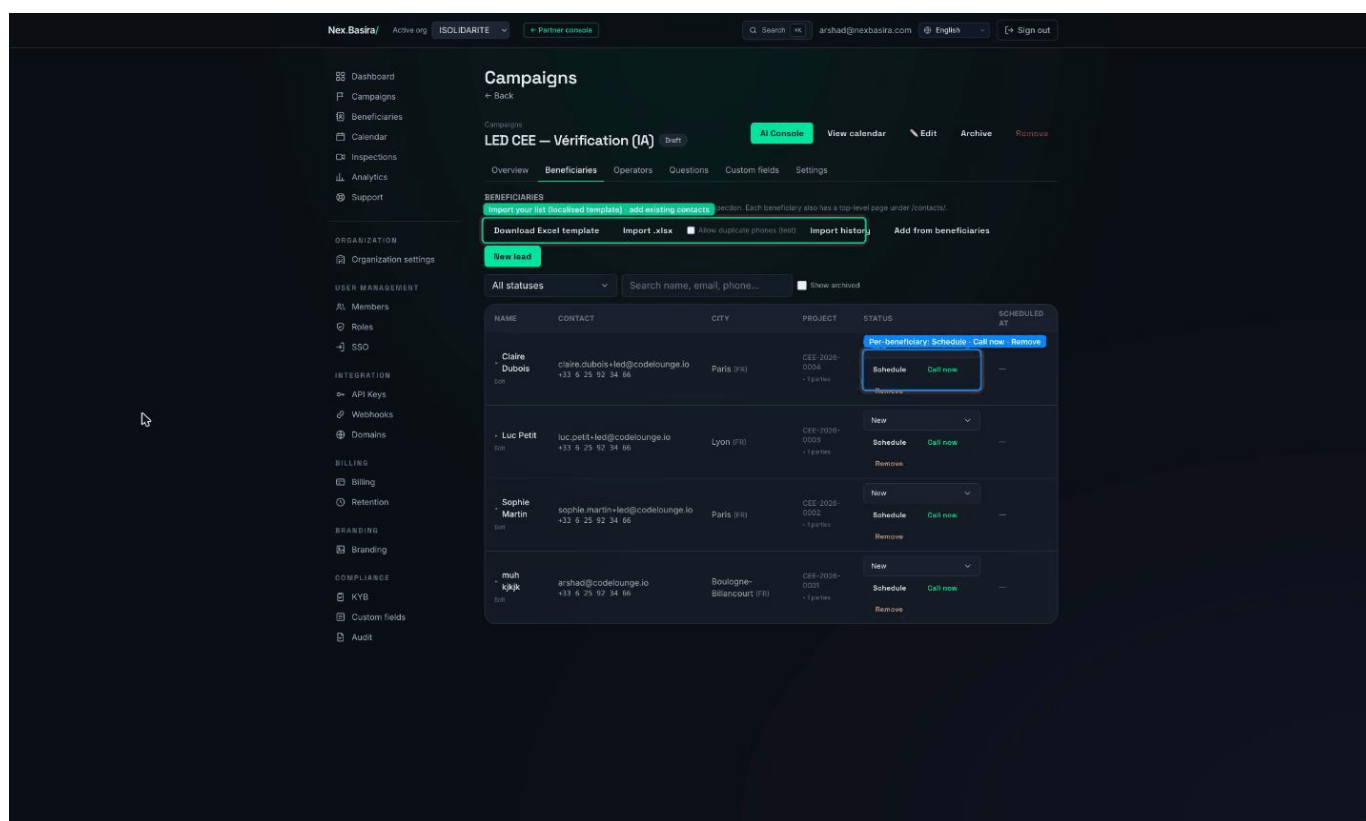
- **Tabs:** Overview (live funnel + booking wave), Beneficiaries, Operators, Questions, Custom fields, Settings.
- **Actions:** AI Console (voice-agent setup, AI campaigns only), View calendar, Edit (re-opens the wizard), Archive, Remove.
- **Booking wave** card shows operators, slots/day, sends/day,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

BENEFICIARIES

People we contact and inspect — survives across campaigns. Per-campaign attempts live under each campaign as memberships.

Search by name, email, phone... ☐ Do-not-call only ☐ Invalid only

NAME	CONTACT	CITY	CAMPAIGNS	FLAGS	ACTIONS
Claire Dubois TEST-0004	claire.dubois+led@codeclounge.io +33 6 25 92 34 66	Paris (FR)	1 campaign Now		Details Edit
Luc Petit LED-0003	luc.petit+led@codeclounge.io +33 6 25 92 34 66	Lyon (FR)	1 campaign Now		Details Edit
Sophie Martin LED-0002	sophie.martin+led@codeclounge.io +33 6 25 92 34 66	Paris (FR)	1 campaign Now		Details Edit
Deleted Contact		(FR)	0 campaigns	Erasure pending	Details Edit
Deleted Contact			1 campaign Now	Erasure pending	Details Edit
adel tes 0020202323	tester@ceertf.com +33 65923466	PARIS	1 campaign Now		Details Edit
Paul Deschamps TEST-0009	paul@ceertf.com +33 6 25 92 34 66	Boulogne-Billancourt (FR)	1 campaign Contacted		Details Edit
Anais Bertin TEST-0008	anais@ceertf.com +33 6 25 92 34 66	Boulogne-Billancourt (FR)	1 campaign Contacted		Details Edit
Sacha Bourgeois TEST-0007	sacha@ceertf.com +33 6 25 92 34 66	Boulogne-Billancourt (FR)	1 campaign Contacted		Details Edit
Zoé Caron TEST-0006	zoe@ceertf.com +33 6 25 92 34 66	Boulogne-Billancourt (FR)	1 campaign Contacted		Details Edit
Leo Guillot TEST-0005	leo@ceertf.com +33 6 25 92 34 66	Boulogne-Billancourt (FR)	1 campaign Contacted		Details Edit
Nina Moulin TEST-0004	nina@ceertf.com +33 6 25 92 34 66	Boulogne-Billancourt (FR)	1 campaign Contacted		Details Edit
Tom Roy TEST-0003	tom@ceertf.com +33 6 25 92 34 66	Boulogne-Billancourt (FR)	1 campaign Contacted		Details Edit
Mila Barbier TEST-0002	mila@ceertf.com +33 6 25 92 34 66	Boulogne-Billancourt (FR)	1 campaign Contacted		Details Edit
Ethan Robin TEST-0001	ethan@ceertf.com +33 6 25 92 34 66	Boulogne-Billancourt (FR)	1 campaign Contacted		Details Edit

1/15 / 28 Previous 1/2 Next

- **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

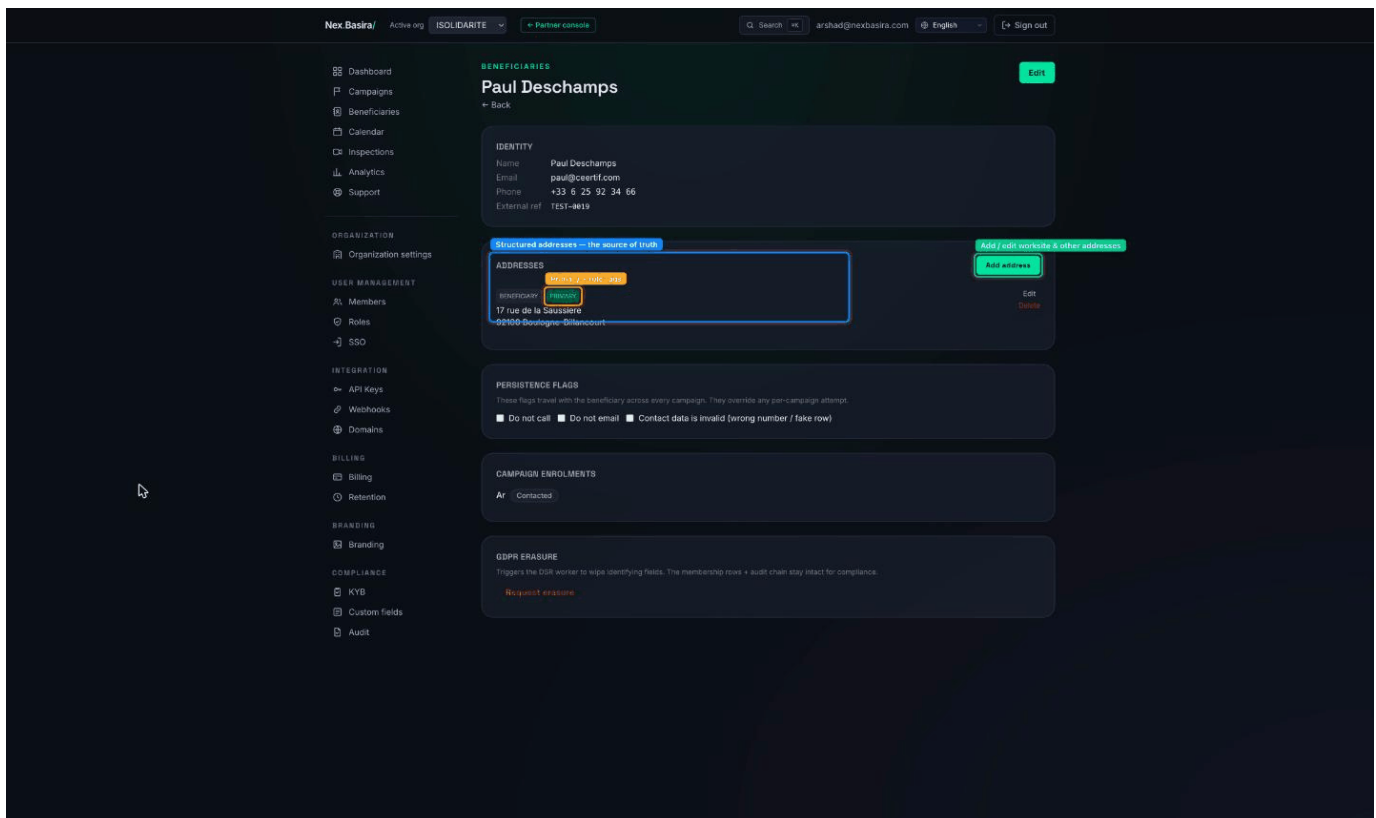
The screenshot shows the 'Paul Deschamps' contact detail page in the Nex Basira interface. The page is divided into several sections:

- Identity**: Fields for Name (Paul Deschamps), Email (paul@certifi.com), Phone (+33 6 23 32 34 66), and External ref (TEST-0019).
- Addresses**: A list of addresses, currently showing one: 17 rue de la Saussière, 92100 Boulogne-Billancourt.
- Persistence flags**: A section with a warning 'Flags that follow the person across every campaign' and three checkboxes: 'Do not call', 'Do not email', and 'Contact data is invalid (wrong number / fake row)'. All are currently unchecked.
- Campaign enrolments**: A section showing the user's status as 'Ar' (Contacted).
- GDPR Erasure**: A section with a 'Request erasure' button and a note: 'GDPR erasure (right to be forgotten) - fields: The membership rows + audit chain stay intact for compliance.'

- **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.

STATUS	CAMPAIGN	STARTED	DURATION	OPERATOR	PEOPLE	EVIDENCE	ACTIONS
Closed	—	07/30/2026, 04:08 PM	—	arshad@nexbasira.com	0	0	Open live room, Media, Audit, Participants
Closed	—	07/30/2026, 02:46 PM	—	arshad@nexbasira.com	0	0	Open, Media, Audit, Participants
Closed	BAR TH 171 AUDIT	07/27/2026, 02:36 PM	—	arshad@nexbasira.com	0	0	Open, Media, Audit, Participants
Closed	ia test campaign	07/25/2026, 02:52 PM	3m 42s	ericbas@ceertf.com	1	0	Open, Media, Audit, Participants
Created	TEST — AI voice call (Eric)	07/20/2026, 01:07 PM	—	eric@arhash.com	0	0	Open, Media, Audit, Participants
Closed	REC —	07/17/2026, 12:26 PM	5m 39s	eric@arhash.com	1	12	Open, Media, Audit, Participants
Closed	TEST — AI voice call (Eric)	07/14/2026, 12:00 PM	—	jess@ceertf.com	0	0	Open, Media, Audit, Participants
Closed	REC —	07/08/2026, 12:18 PM	17m 06s	eric@arhash.com	1	26	Open, Media, Audit, Participants
Closed	REC —	07/07/2026, 08:49 AM	8m 23s	eric@arhash.com	1	28	Open, Media, Audit, Participants
Closed	REC —	07/06/2026, 10:18 AM	7m 16s	eric@arhash.com	1	25	Open, Media, Audit, Participants
Closed	REC —	07/06/2026, 09:35 AM	3m 41s	eric@arhash.com	1	6	Open, Media, Audit, Participants
Closed	—	07/06/2026, 09:03 AM	3m 34s	eric@arhash.com	1	1	Open, Media, Audit, Participants
Closed	—	07/06/2026, 08:42 AM	3m 12s	eric@arhash.com	1	0	Open, Media, Audit, Participants
Closed	—	07/05/2026, 11:11 PM	6m 08s	eric@arhash.com	1	0	Open, Media, Audit, Participants

Each row's actions:

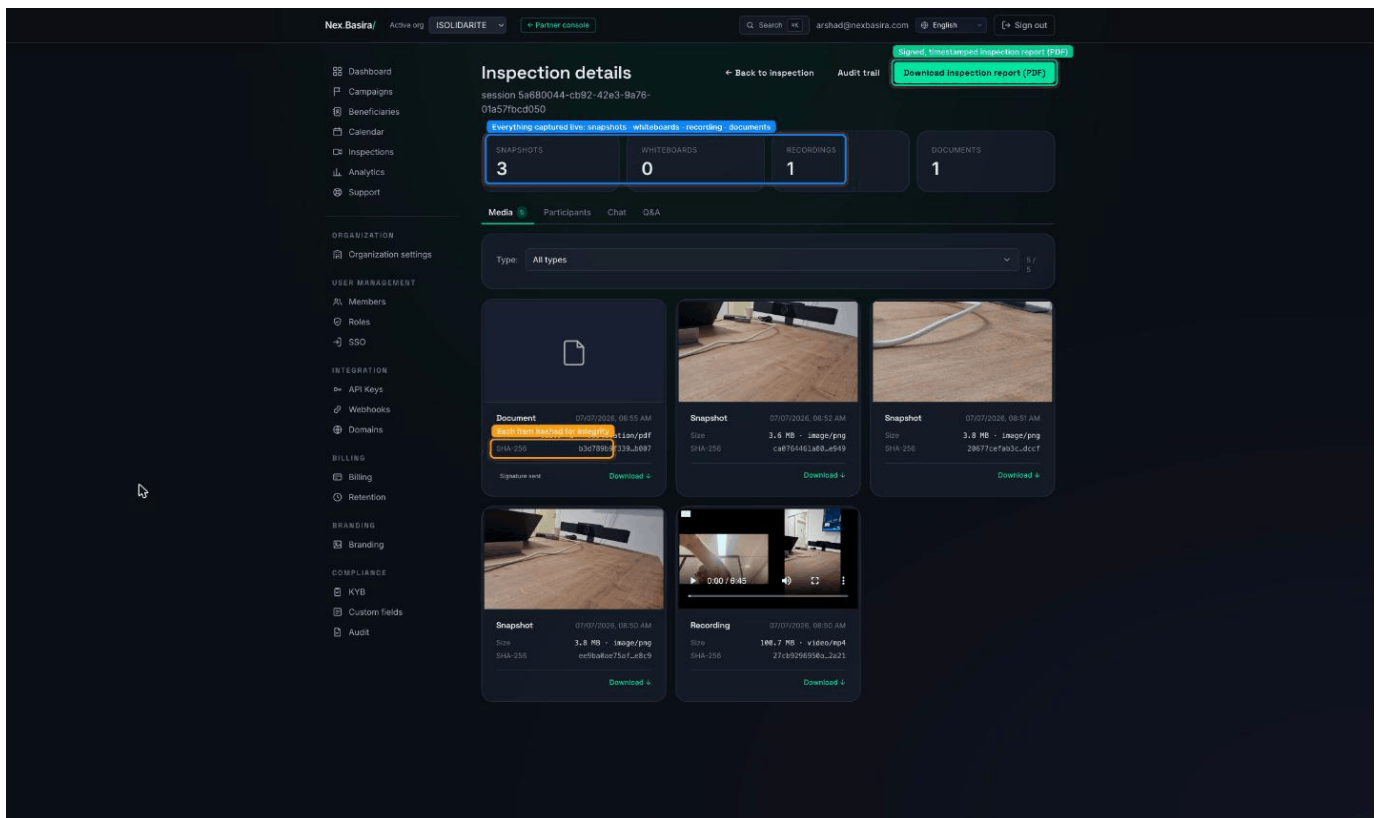
- **Open** — enter the live room (to run or observe the session).
- **Media** — the captured evidence + report (below).
- **Audit** — walk the tamper-proof evidence chain (see §4).
- **Participants** — who was in the call.

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.

You've reached the end of the Organization guide. See also the [Operator](#) and [Reseller](#) guides.

3. Operator guide

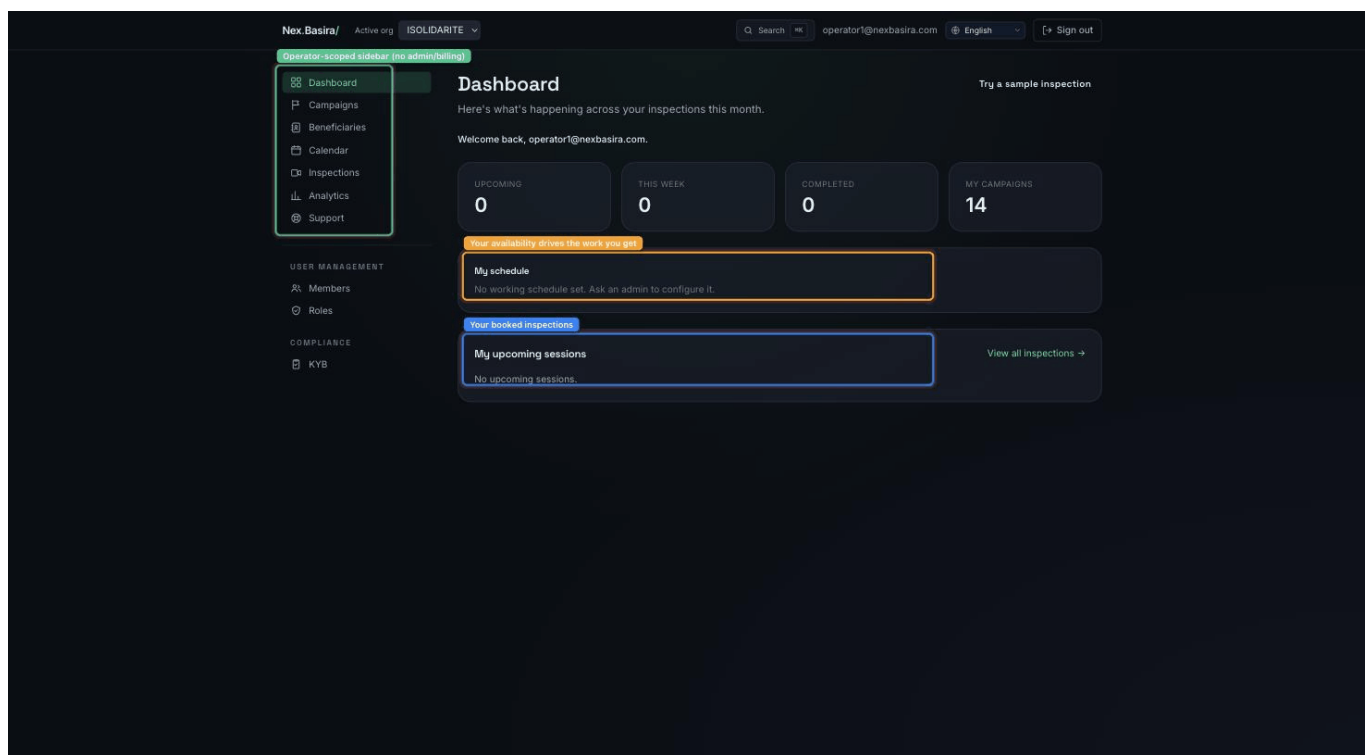
For **inspectors / operators** — the people who run the live video inspections. Your job is simple: pick up the next beneficiary, verify their situation on a short video call, capture the evidence, and finish. The platform handles the scheduling, the queue, and the paperwork.

3.1 Contents

1. [What you see](#)
2. [Your queue \(Smart Queue\)](#)
3. [Your calendar](#)
4. [Getting a beneficiary on the call](#)
5. [Running the inspection](#)
6. [Signatures](#)
7. [Finishing & the report](#)

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.

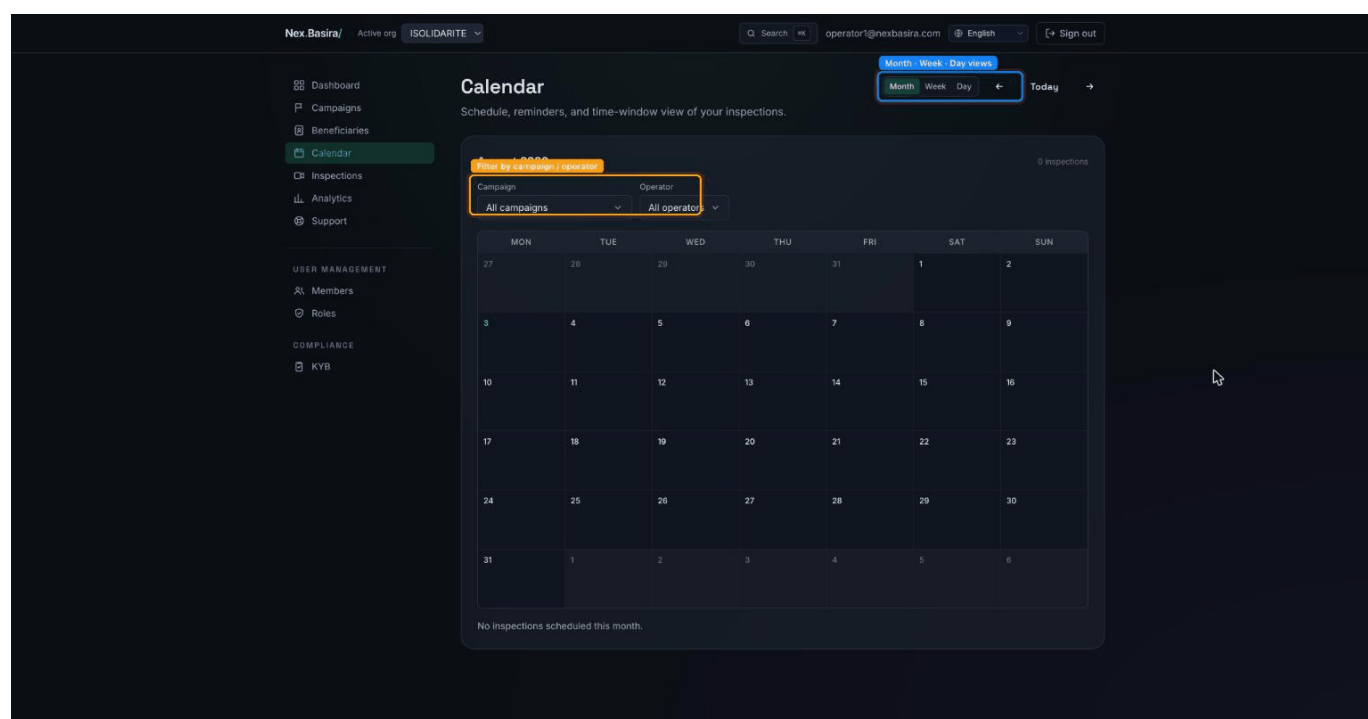
3.3 2. Your queue (Smart Queue)

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.

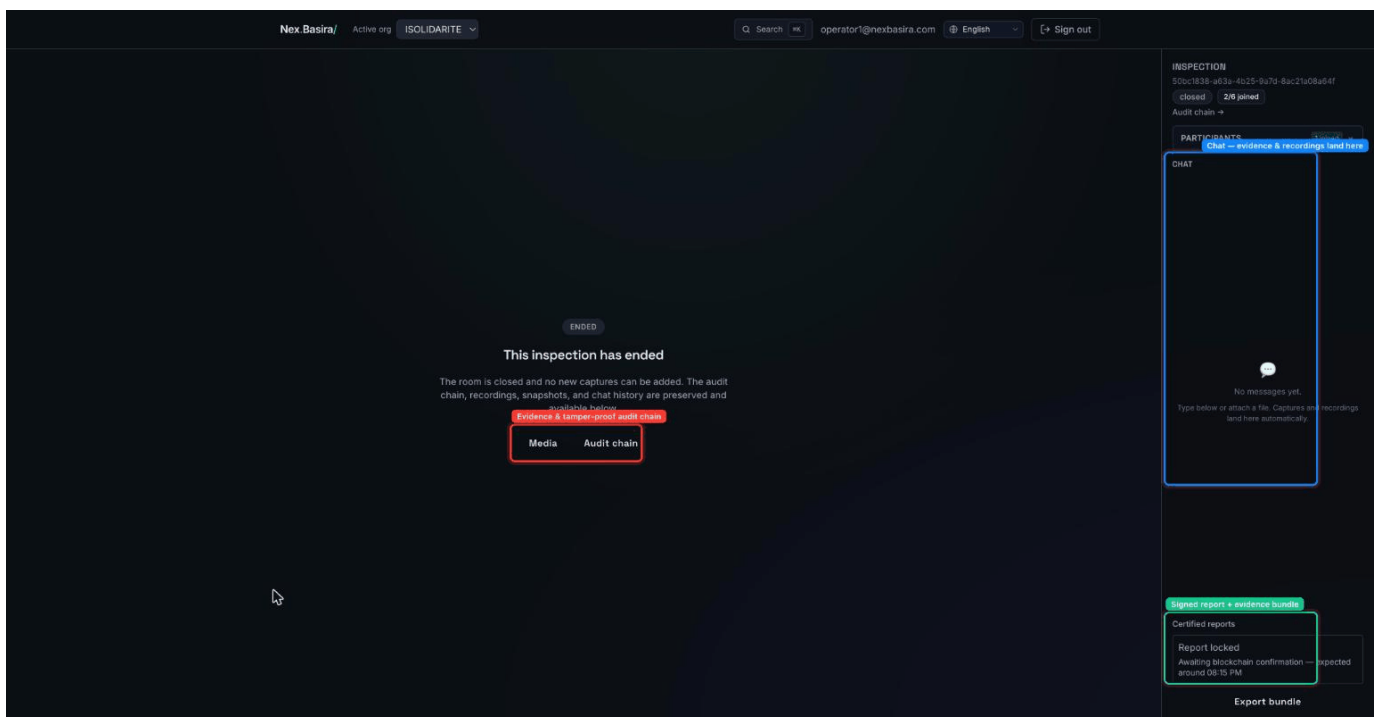
3.6 5. Running the inspection

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.

Nex.Basira/ Active org: ISOLIDARITE

Search: operator1@nexbasira.com English Sign out

Inspection details

session 50bc1838-a63a-4b25-9a7d-8ac21a08a84f

← Back to inspection Audit trail

Everything captured live

SNAPSHOTS	WHITEBOARDS	RECORDINGS	DOCUMENTS
3	1	0	0

Media Participants Chat Q&A

Type: All types 4 / 4

Media Item	Type	Date	Size	SHA-256	Action
Whiteboard	Whiteboard	08/03/2026, 07:31 PM	12.1 KB · image/png	287a7cfaa744_abc4	Download
Demo capture #3	Snapshot	08/03/2026, 07:29 PM	48.85668, 2.35219 · s8n	6e12948ba4c_5829	Download
Demo capture #2	Snapshot	08/03/2026, 07:26 PM	48.85664, 2.35219 · s8n	e1e879d753bc_98b8	Download
Demo capture #1	Snapshot	08/03/2026, 07:23 PM	48.85668, 2.35219 · s8n	6e12948ba4c_5829	Download

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.

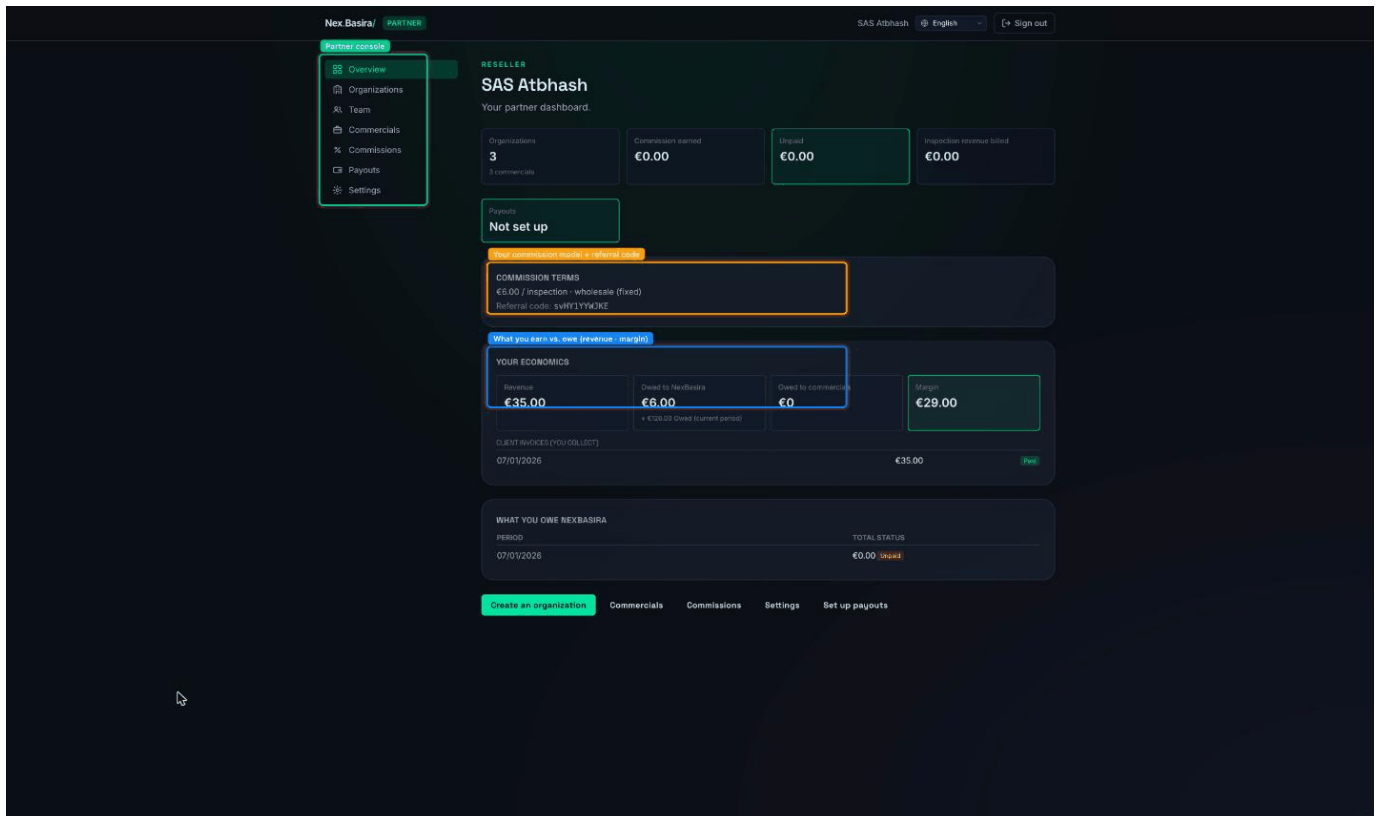
Enter it from the ← **Partner console** link in the top bar.

4.1 Contents

1. [The partner dashboard](#)
 2. [Your organizations](#)
 3. [Opening a client's console](#)
 4. [Team & roles](#)
 5. [Commissions & payouts](#)
-

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.

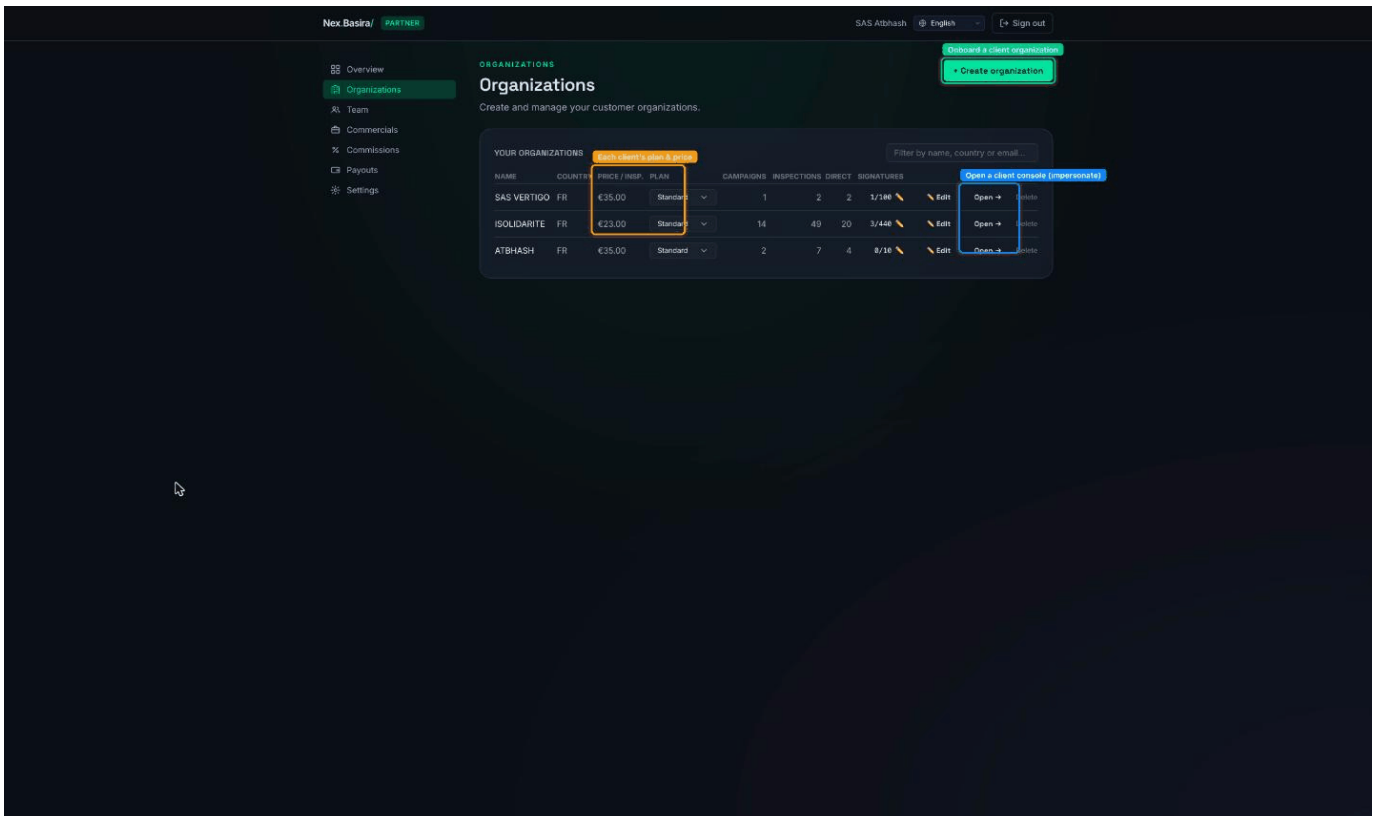


- **Tiles** — organizations, commission earned, unpaid, inspection revenue billed, and payout status.
- **Commission terms** — your model and rate (e.g. $\text{€}6.00 / \text{inspection} \cdot \text{wholesale (fixed)}$) plus your **referral code**.
- **Your economics** — **Revenue** (what you invoice 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.