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bamisOS Business — Training Academy

Learn to run your CRM, invoicing, store, POS and marketing workspace.
Five short lessons, about 45 minutes total.

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[Start free — build as you learn →](#)

Welcome

bamisOS replaces the pile of subscriptions you run your business on — the CRM, the invoicing tool, the scheduler, the copywriter, the store builder — with **one login that carries your brand**.

Do the five lessons in order during your first hour and you'll be running your business on bamisOS.

Lesson 1 — Your First Day (10 min)

Sign in

Open the link in your welcome email (it looks like *yourbusiness.bamistech.com/app*). Enter your email and password. Everything from now on happens inside this one screen.

Install bamisOS Business on your phone or computer

Open **bamis.bamistech.com** in a supported browser and choose **Add to Home Screen** or **Install app**. The installable app keeps key pages and recent business data available during weak connectivity. Supported offline changes are queued and replayed when your connection returns.

Make it yours

Go to **Settings → Branding**:

- Paste your **logo** link, pick your **brand color**
- Add your **WhatsApp number** (with country code) — this switches on WhatsApp buttons across your store, leads and clients
- Add your **Facebook / Instagram / X / TikTok** links — they appear on your public pages
- Press **Save**

Save your tax profile

In **Settings → Branding**, choose your tax country and save your Tax ID, VAT rate, withholding-tax rate and service-charge rate. New invoices automatically use the saved VAT rate unless you enter a different invoice-level tax. Withholding tax and service charge are stored for reference and are not automatically added to invoice totals in this release.

From this moment, every page your customers see — invoices, store, client portal — carries your name and colors. Not ours. Yours.

Change your password

Bottom-left corner → **Change password**. Do this on day one.

Look around

The left menu is your whole business: **Overview** (dashboard) · **Revenue** (pipeline, invoices, store) · **Marketing** (pages, emails, AI) · **Workspace** (tasks, files, bookings, clients) · **Settings**.

Lesson 2 — Never Lose a Lead Again (10 min)

Your pipeline is a row of columns: NEW → CONTACTED → PROPOSAL → CONVERTED / LOST. Every lead is a card that moves left to right. That's the whole system.

Add a lead

Revenue → CRM Pipeline. Enter the lead's name, deal value and **either a WhatsApp phone number or an email address → Add lead**. Email is optional when a phone number is supplied.

Work a lead

Drag the card forward as things happen — you called (CONTACTED), you quoted (PROPOSAL), they paid (CONVERTED), it went quiet (LOST). Your dashboard's **pipeline value** updates live. If you saved a phone number, each card has a green **Chat on WhatsApp** link.

Catch leads while you sleep

Put a **lead form** on one of your pages (Lesson 4) — every submission lands in your pipeline automatically as NEW.

Follow up automatically

Marketing → Email Sequences → New sequence → trigger "every new lead". Add steps, e.g.:

- Step 1 (immediately): "Welcome — thanks for reaching out, we'll reply within a day"
- Step 2 (after 48 hours): "Just checking in — anything we can help with?"

Type **{{first_name}}** anywhere and bamisOS fills in the lead's name automatically. Every new lead now gets your follow-up series without you touching anything.

 **Tip** — The golden habit: every business card, WhatsApp enquiry, DM or phone call becomes a lead card **the same day**. Deals you don't track are deals you forget.

Lesson 3 — Get Paid Faster (10 min)

Create an invoice

Revenue → Finance → New invoice. Add the client's name and email, list your line items (description, quantity, price), and pick the currency. Your saved VAT rate is applied automatically; you can override the tax on an individual invoice. The total calculates itself.

Send it — two ways

- **Link** — click "Link" on the invoice row; it's copied to your clipboard. Send it by WhatsApp or email. It opens a beautiful branded payment page where the client pays by card.
- **PDF** — click "PDF" for a polished branded invoice to attach or print.

Watch it get paid

When the client pays online, the invoice flips to **PAID** by itself and shows up in your money-in records.

Give clients their own login

Workspace → Clients → Add client. Share the portal link and their password. From now on they can sign in any time, see their invoices and balance, and pay — without calling you.

Track your money

Log expenses as they happen; the dashboard shows invoiced, outstanding, spent and net balance. Export everything for your accountant at month-end.

 **Tip** — Invoice the same day the work finishes — same-day invoices get paid roughly twice as fast as week-late ones.

Lesson 4 — Your Website, Store and Marketing (10 min)

Build a page in minutes

Marketing → Sites & Funnels → New page. Pick an address (e.g. *spring-offer*), then stack blocks: **Hero** (headline), **Features**, **Pricing**, **Lead form**, **Booking**, **Store**, **CTA**. Rearrange freely, press **Publish** — your page is live instantly in your brand colors, with view counting.

Open your store — with automatic stock control

Revenue → Store → Add product. Fill in the product name, then its **Model** (e.g. *Stone-coated 0.55mm*), **Model code / SKU** (e.g. *SC-055*) and optional **Batch number** — so different models of the same

product are always distinguishable. Add as many products and as many models as you need; there is no limit. Tick "**Track stock**" and enter how many you have. From that moment:

- **Every sale deducts itself.** When a customer checks out, the quantity is removed from that model's stock instantly — it is impossible to sell more than you have.
- **Customers see live availability** — "8 available", "Only 3 left!" or "Sold out" with the buy button switched off. The model and model code are shown on the storefront so customers order the exact model they want.
- **Add stock anytime** — type a quantity on the product card and press **Add stock**. Your total updates immediately. Need to change a model, code or batch later? Press **Edit**.
- **Everything is recorded** — the **Stock ledger** at the bottom of the Store page lists every addition, sale, cancellation and correction with timestamps, showing each model's code.
- **Low-stock alerts** — set your alert number per product; you get notified when a sale drops stock below it.
- **Cancelling an order restocks it** — if you cancel an order, its items return to stock automatically, once, and the ledger records it.

When a customer orders: the order appears with a ready-made invoice → they pay via the link → you press ✓ **Confirm paid**. With your WhatsApp number set, every product also gets an **Order on WhatsApp** button.

Discounts, coupons & gift cards

Revenue → **Coupons & Gifts**. Create a coupon like *WELCOME10* (10% off), set a minimum order, a usage limit or an expiry date. Customers type the code in their cart at checkout and see the discount applied instantly. Create gift cards with a balance — sell them or gift them, and void them anytime. Every coupon usage is tracked so you can see which promotions actually convert.

Take walk-in payments — POS Register

Revenue → POS Register. Tap products to build the sale, then press how they paid: **CASH / CARD / TRANSFER / USSD**. Stock deducts, an invoice is created and income is recorded — a walk-in sale takes seconds.

Use supported workflows during weak connectivity

The offline-first app can cache recent products, invoices, leads and branding data. Supported POS sales, invoices, leads, product changes and orders are queued when the connection drops. Keep the browser open; the app shows pending activity and retries it when internet access returns. Confirm that queued items have synchronized before closing the day.

Get paid by bank transfer — fake-alert-proof

Settings → **Branding** → *Bank transfer details* — save your bank name, account name and account number. Every checkout and invoice then shows a **Pay by bank transfer** panel with your details and a payment reference. Your customer transfers, presses **“I have paid — notify the seller”** (you get an instant alert), and you press ✓ **Confirm paid** in Store → Orders once the money lands. Nothing is ever marked paid until you confirm — fake bank alerts cannot fool the system.

Let AI write your marketing

Marketing → AI Suite. Describe the job in one line — *"promote our weekend laundry discount in Lagos"* — and pick a tool:

- **Social Post** — a ready post with hashtags + one-tap sharing to X, Facebook, WhatsApp, LinkedIn
- **Ad Copy** — three headline variants to test
- **Email Outreach** — a cold outreach email
- **Blog Outline** — structure for your next article

Get alerted instantly

Settings → Integrations → + Telegram bot. Follow the 2-minute instructions, tick the events you care about (new lead, new order, invoice paid, form submitted), press **Send test**. Your phone now buzzes the moment anything happens.

Invite your team

Settings → Team. Members work the tools; **Admins** can also change branding, plans and settings. You always keep at least one admin — yourself. The Free plan is limited to one user, so adding team members requires a paid plan.

Store your documents — the File Vault

Contracts, receipts, agreements and assets, organized.

bamisOS Business includes a private file vault for your workspace. Create folders, upload contracts and documents, and find any file in seconds — every file is a click away from the invoice or client it belongs to.

- 1 Open **Files** in the sidebar.
- 2 Create folders that match how you work — e.g. *Clients, Contracts, Receipts*.
- 3 Upload files, or download any file straight from the vault.

 **Tip** — Keep signed client agreements in the vault — when a payment question comes up, you have the proof in seconds.

If you forget your password — account lockout protection

Your workspace protects itself automatically.

After **5 wrong passwords in a row**, the account locks for **15 minutes** to stop attackers from guessing. Nobody can reset the timer

— not even a different password attempt — just wait for the lock to lift. Correct logins always work immediately and reset the counter.

 **Tip** — Locked out? Wait 15 minutes and sign in again. If it keeps happening, ask your workspace owner to reset your password.

Help your customers instantly — the chat bubble

Every public page you own (store, funnel pages, client portal, invoice payment page) carries a gold **chat bubble** in the bottom corner. A customer clicks it, types their question — and it appears in **Workspace → Support** in your app, where you type your reply. They see your answer **on the same page, seconds later**. No phone numbers, no email chains.

- The widget also offers **WhatsApp** and **Telegram** buttons — set both in Settings → Branding for one-tap direct chats
- Chats stay open until you press **Mark resolved**; customers can return to the conversation anytime
- Add your **Telegram username** in Branding to switch on the Telegram button in the widget

Lesson 5 — Daily, Weekly, Monthly Rhythms (5 min)

Every day (5 minutes)

- Open the **Dashboard** — pipeline value, what's outstanding
- Drag any moved deals in the **Pipeline**
- Clear today's **Tasks**, check tomorrow's **Bookings**

Every week (15 minutes)

- Review NEW leads — anything not contacted yet?
- Send invoices for finished work — same day

- Generate and share one **Social Post**

Every month (20 minutes)

- Export invoices + expenses for your accountant
- Check your **Billing** page — plan, quota, next charge
- Hide store products that aren't moving

Good to Know

Your trial and plan

Your workspace starts with a 30-day trial. When the trial ends it continues on the **Free plan**; existing data remains safe and usable within the Free limits. Current monthly plan prices are:

Free

¥0

- 50 leads · 10 products · 20 invoices · 40 orders
- One user
- Store · CRM · forms · portal

Starter

¥12,500/mo

- Up to 500 leads
- 25,000 AI tokens
- Invoices, forms and your brand

Professional

¥34,500/mo

- Unlimited leads
- 150,000 AI tokens
- POS · bank transfers · sequences · sites · AI suite

Business

¥85,000/mo

- Everything in Professional
- 500,000 AI tokens

- Priority support and onboarding

For Nigerian accounts, checkout uses fixed Naira pricing through Paystack when it is enabled, with supported Paystack channels such as card, bank transfer and USSD. International USD pricing shown in the app is \$9.99 Starter, \$49.99 Professional and \$99.99 Business monthly.

Subscription lifecycle

You can schedule cancellation from Billing; access continues through the paid period. A failed Stripe renewal enters a seven-day grace period. After the grace period, business tools can be frozen while login, billing and configuration remain available for reactivation.

AI tokens are your monthly allowance for AI writing. The usage indicator in the app shows what remains.

Files live in the Vault (up to 2MB per file), organized in folders.

Privacy: your workspace is completely private — your leads, invoices and files are yours alone.

Troubleshooting

PROBLEM	FIX
Can't sign in	Check that you are at your own workspace link. Five failed attempts lock sign-in for 15 minutes; wait for the lock to expire or ask support for help.
Client can't see an invoice in the portal	The invoice's client email must exactly match their portal account email

AI says "quota exceeded"

You've used your monthly tokens — they reset on your billing date, or upgrade your plan

WhatsApp button missing

Add your WhatsApp number (with country code) in Settings → Branding

Page not showing after publish

Press **Publish** (not just Save) — the badge must say LIVE

Reached the 500-lead limit

Delete old LOST leads, or upgrade — your data is never lost either way

Anything else

Contact your platform provider — they can look into your account directly and help

The One-Paragraph Summary

bamisOS Business is one login for your whole business: **every enquiry becomes a tracked lead; every lead gets automatic follow-up; every job becomes a branded invoice with a one-tap payment link; every product sells on your own storefront; and your website, portal and marketing carry your brand — not somebody else's.** Work the daily rhythm — leads in, drag cards, invoice same-day — and the system does the rest.

Welcome aboard.