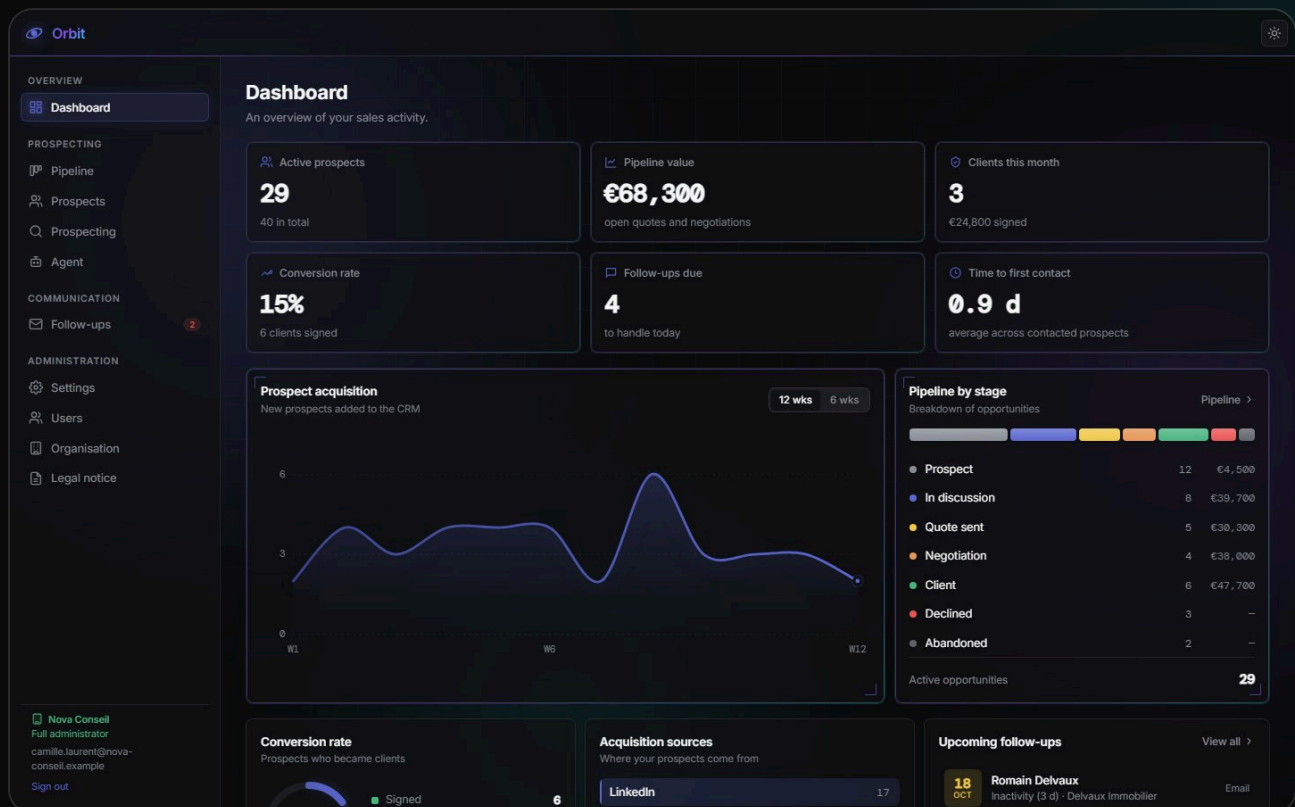


USER GUIDE

Orbit

Your team's B2B prospecting CRM: find prospects, track them through a pipeline and let Orbit follow up for you.



Contents



01	Overview	The CRM and the Prospector: who does what
02	First sign-in and two-factor authentication	Invitation, QR code, forgotten password, signing out
03	Interface, languages and theme	
04	Dashboard	
05	Pipeline	
06	Prospects and prospect records	Search, export, contact details, enrichment, actions
07	Automatic follow-ups	The sequence, the log, failures
08	Sending mailbox, templates and saved replies	
09	Prospector: search missions	Google Maps, LinkedIn, Leads Finder
10	Prospector: manual LinkedIn profile	
11	Prospector: LinkedIn outreach and desktop agent	
12	Team, roles and organisation	
13	Security and GDPR	
14	FAQ and troubleshooting	
15	Support	

CHAPTER 01

Overview

Orbit brings together two applications under a single account: the **CRM**, where you track your prospects all the way to signature, and the **Prospector**, which finds new prospects and handles first contact on LinkedIn.

APPLICATION	WHAT YOU DO THERE
CRM	Dashboard, pipeline by stage, prospect records, automatic email follow-ups, email templates, team and settings.
Prospector	Search missions (Google Maps, LinkedIn, Leads Finder), analysis of a LinkedIn profile from its URL, LinkedIn invitations and first messages.

A prospect's typical journey

- 1 A Prospector **mission** finds companies or decision-makers and scores them (from 1 to 10).
- 2 The best profiles become **prospect records** in the CRM.
- 3 Orbit sends the **first contact**, then **follow-ups** if the prospect does not reply.
- 4 You move the prospect through the **pipeline**: in discussion, quote sent, negotiation... all the way to **Client**.

What you need

- A recent browser (Chrome, Edge, Firefox or Safari).
- An authenticator app on your phone (Google Authenticator, Microsoft Authenticator, Authy...).
- Your business mailbox (Gmail, Outlook / Microsoft 365, OVH or any other SMTP server).
- For LinkedIn outreach: your LinkedIn account and the Orbit **desktop agent** installed on your Windows computer.

CHAPTER 02

First sign-in and two-factor authentication

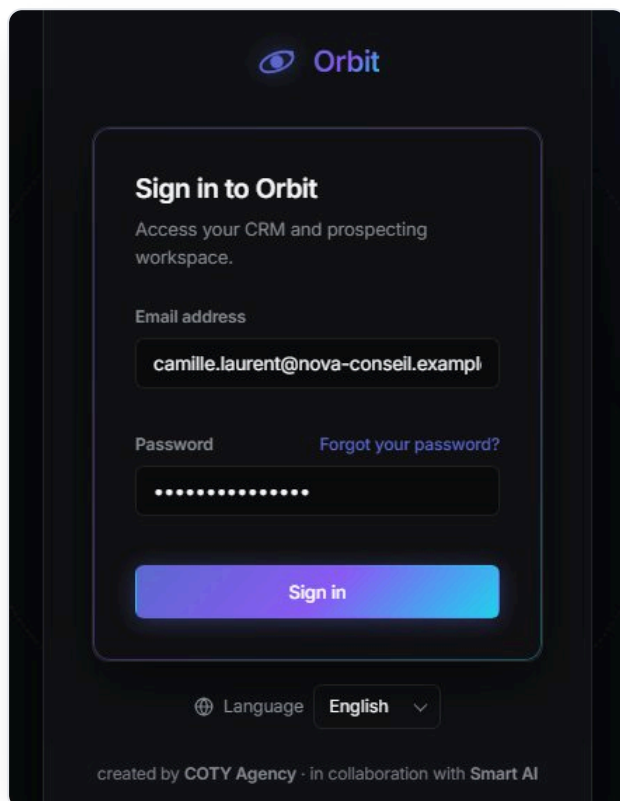
Accounts are created by your organisation's administrator: you receive an **invitation by email**. Signing in combines a password and a 6-digit code.

Activate your account

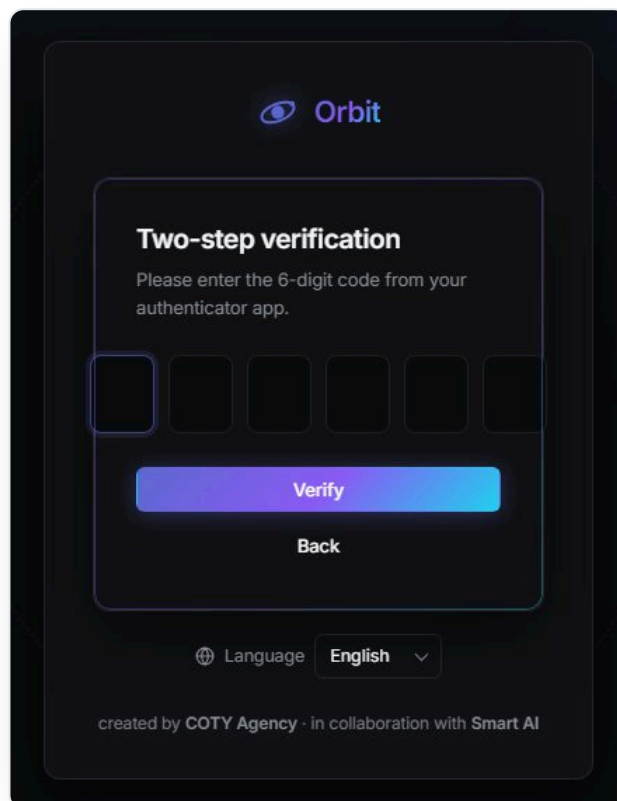
- 1 Open the link in the invitation email. The **Welcome to Orbit** screen appears.
- 2 Choose your password: at least **10 characters**, with at least one letter and one digit. Confirm it, then click **Set password and continue**.
- 3 On the **Enable two-factor authentication** screen, scan the QR code with your authenticator app (or enter the manual key).
- 4 Enter the 6-digit code shown by the app, then **Enable and sign in**.

Signing in afterwards

- 1 Enter your **email address** and **password**, then **Sign in**.
- 2 **Two-step verification** screen: type the 6-digit code from your app and click **Verify**.



Sign in to Orbit. You can pick the language right on this screen.



Two-step verification. Six boxes, one per digit.

Forgotten password

Click **Forgot your password?**, enter your address and **Send the link**. The link you receive by email opens the screen for choosing a new password. Your two-factor authentication is kept.

Signing out

At the bottom of the left menu, under your organisation name, your role and your email:

Sign out. For security, an expired session automatically takes you back to the sign-in screen.

CHAPTER 03

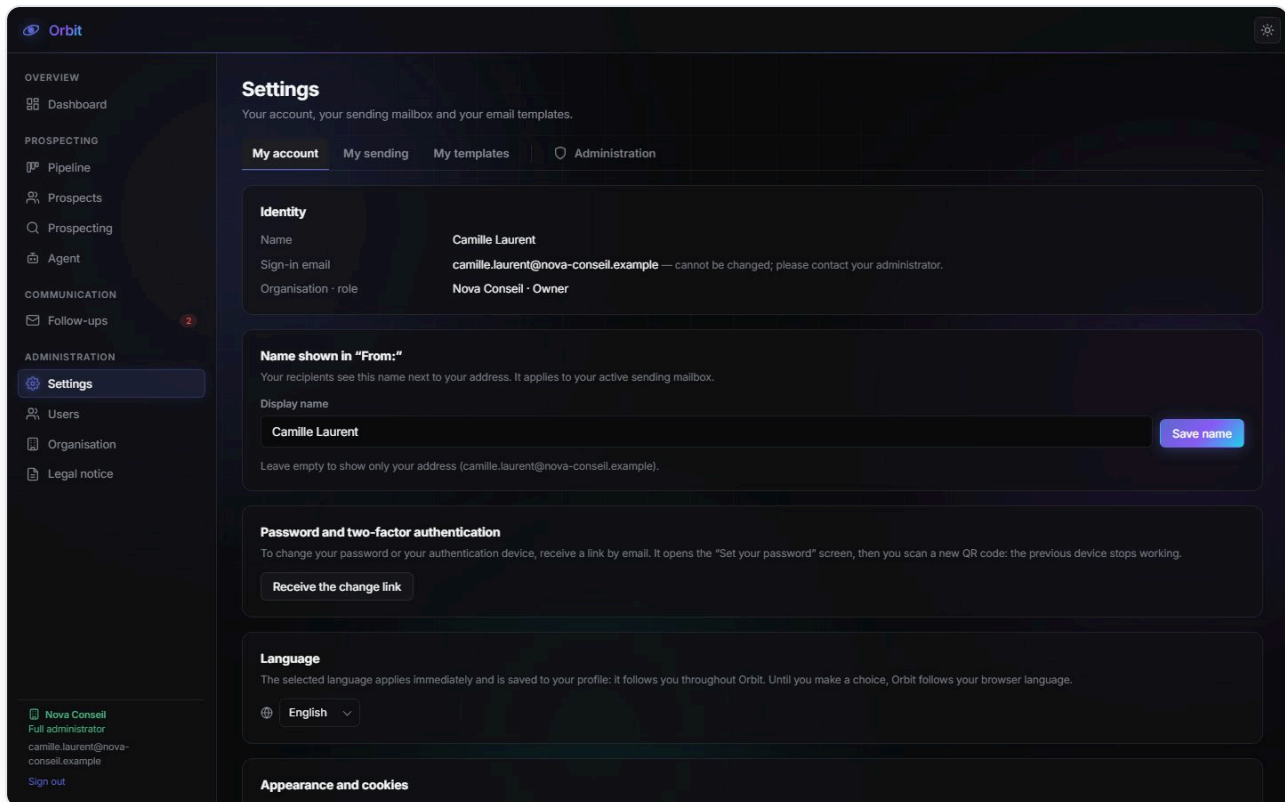
Interface, languages and theme

The CRM menu is organised into four groups. The entries you see depend on your permissions.

GROUP	ENTRY	PURPOSE
Overview	Dashboard	Your sales metrics at a glance.
Prospecting	Pipeline	Prospects in columns, by stage.
	Prospects	The full list, filterable and exportable.
	Prospecting	Opens the Prospector in a new tab (no need to sign in again).
	Agent	Installation of the desktop agent for LinkedIn.
Communication	Follow-ups	The log of every email sent. A red badge flags failures.
Administration	Settings	Account, sending mailbox, templates, bin.
	Users	Invite colleagues and set their permissions.
	Organisation	Your workspace's information.
	Legal notice	Terms of use and data policy.

Changing the language

Orbit is available in **English**, **French** and **Spanish**. Choose the language on the sign-in screen or in **Settings → My account → Language**. The change applies immediately, is saved to your profile and also applies to the Prospector.



My account: language, theme and cookies.

Light or dark theme

The sun / moon button at the top right switches the theme. In **Settings → My account**, you can also choose **Same as system**.

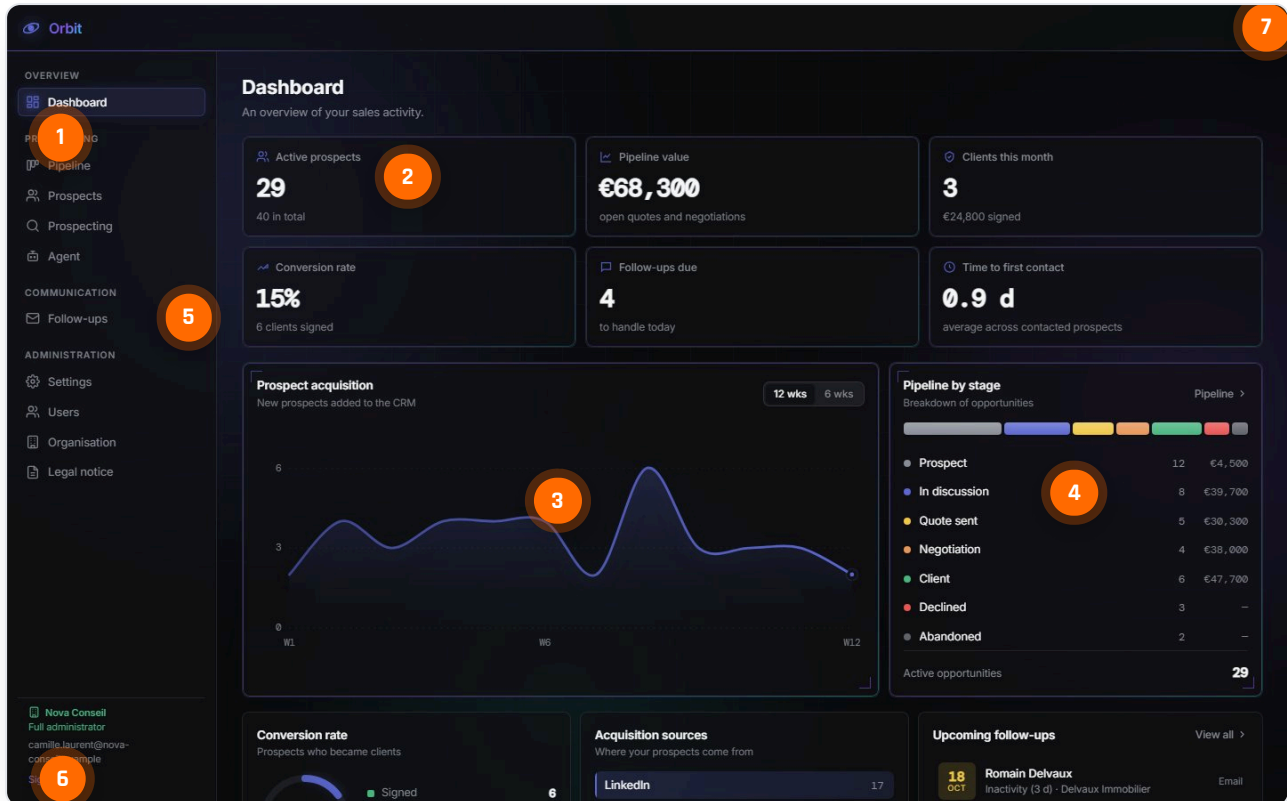
COOKIES

Orbit uses neither advertising nor audience measurement. The **Cookies** button lets you choose what is remembered (theme preference, fonts). Items needed to sign in always stay active.

CHAPTER 04

Dashboard

The dashboard opens every time you sign in: an overview of your sales activity.



The dashboard.

- 1 Menu grouped into Overview, Prospecting, Communication, Administration.
- 2 Key metrics: six figures kept up to date.
- 3 Acquisition: new prospects per week (12 or 6 weeks).
- 4 Pipeline by stage, with the value of each stage.
- 5 Red badge: failed follow-ups to deal with.
- 6 Your account: organisation, role, email and sign-out.
- 7 Theme, light or dark.

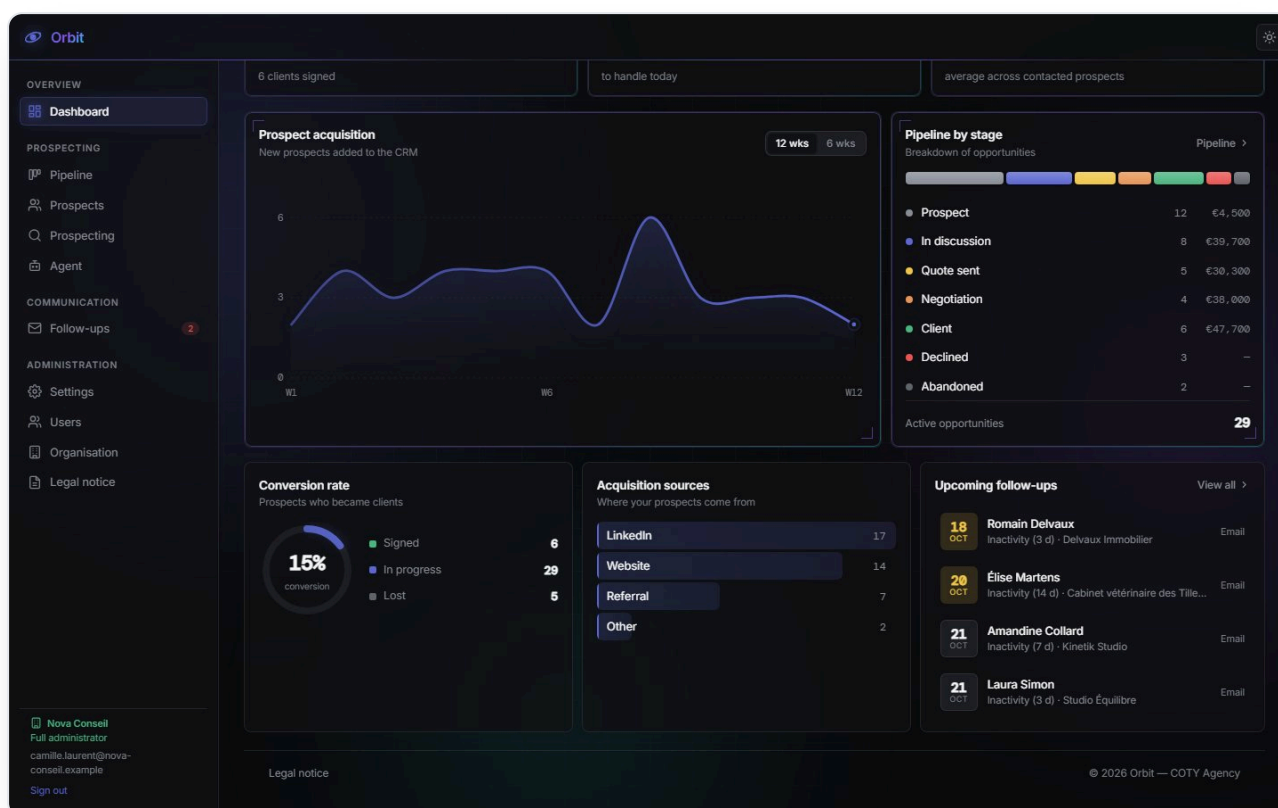
The six metrics

METRIC	WHAT IT MEASURES
Active prospects	Prospects currently being followed (excluding clients, declined and abandoned).
Pipeline value	The total of open quotes and negotiations.
Clients this month	Prospects signed this month, and the amount signed.

Conversion rate	The share of prospects who became clients.
Follow-ups due	Follow-ups to handle today.
Time to first contact	The average time between a prospect's arrival and the first contact.

The charts

- **Prospect acquisition:** new prospects per week (hover over a point for details).
- **Pipeline by stage:** how opportunities are spread; the **Pipeline** link opens the board.
- **Conversion:** signed, in progress and lost.
- **Acquisition sources:** where your prospects come from (LinkedIn, referral, website...).
- **Upcoming follow-ups:** the next emails to go out; **View all** opens the follow-up log.

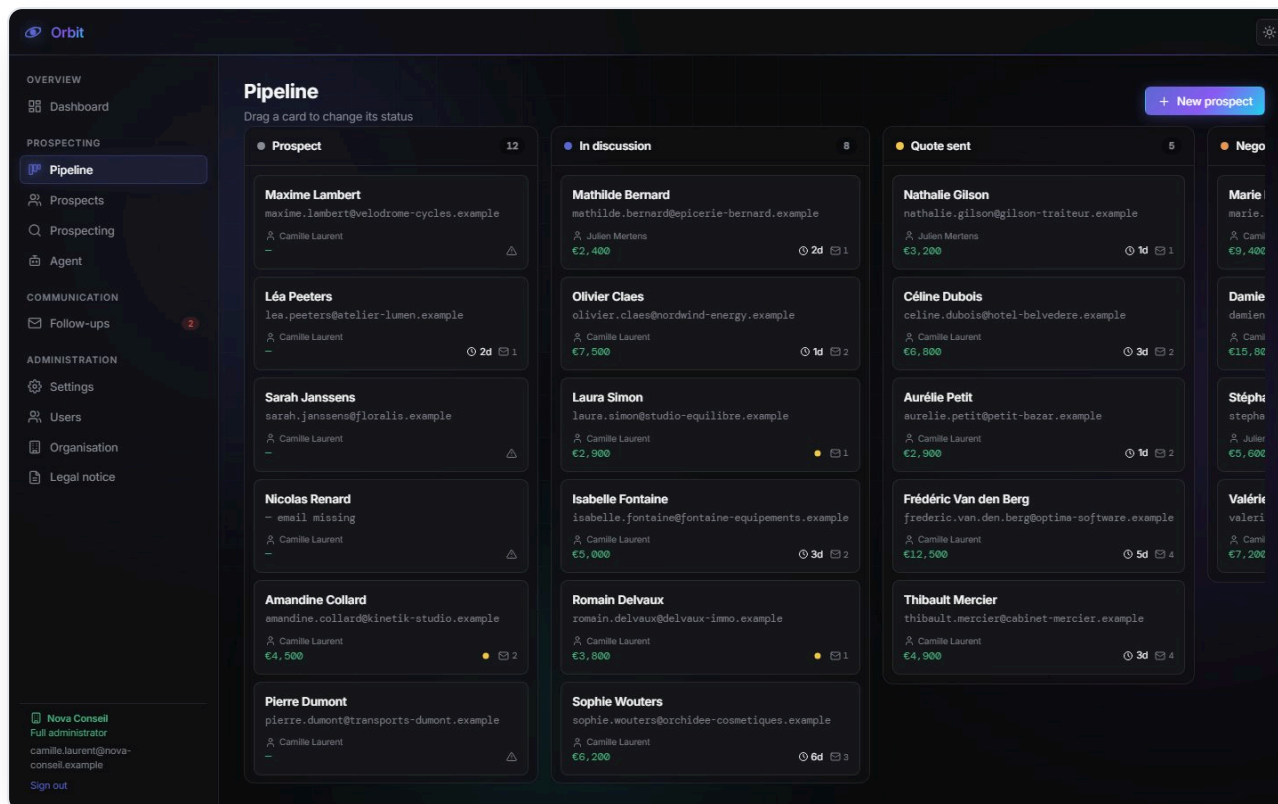


Conversion, sources and upcoming follow-ups, at the bottom of the dashboard.

CHAPTER 05

Pipeline

Each column is a sales stage. Drag a card from one column to another to change its status.



The pipeline. One card per prospect, with its value and follow-up status.

The stages

Prospect → In discussion → Quote sent → Negotiation → Client, with two negative outcomes: Declined and Abandoned.

Reading a card

- The name, the company and the estimated value.
- A badge shows the next follow-up ("in 3 d", "imminent") or "Automation disarmed" when no follow-up can be sent (missing email, for example).
- Click the card to open the prospect record.

TIP

Moving a prospect to **Quote sent** automatically schedules a **quote follow-up** 7 days later. No need to remember it yourself.

The **New prospect** button creates a record straight from the pipeline.

CHAPTER 06

Prospects and prospect records

The full list of your prospects, and the detailed record for each one.

PROSPECT	STATUS	SOURCE	ACCOUNT	BUDGET	FOLLOW-UP	LAST CONTACT
BL Bruno Lecocq	Prospect	Other	Camille Laurent	—	disarmed	21 Oct 2026
ML Maxime Lambert Velodrome Cycles · Founder	In discussion	Website	Camille Laurent	—	disarmed	—
MD Marie Dupuis Belvia Assurances · CMO	Negotiation	LinkedIn	Camille Laurent	€9,400	2 d	20 Oct 2026
MB Mathilde Bernard Epicserie Bernard · Owner	In discussion	Website	Julien Mertens	€2,400	2 d	20 Oct 2026
LP Léa Peeters Atelier Lumen · Owner	Prospect	LinkedIn	Camille Laurent	—	2 d	—
NG Nathalie Gilson Gilson Traiteur · Owner	Quote sent	Website	Julien Mertens	€3,200	1 d	19 Oct 2026
DL Damien Leroy Leroy Construction · Director	Negotiation	Referral	Camille Laurent	€15,800	1 d	19 Oct 2026
OC Olivier Claes Nordwind Energy · CEO	In discussion	LinkedIn	Camille Laurent	€7,500	1 d	19 Oct 2026
SC Stéphane Cornet Brasserie des Trois Collines · Owner	Negotiation	Website	Julien Mertens	€5,600	1 d	18 Oct 2026
LS Laura Simon Studio Equilibre · Director	In discussion	LinkedIn	Camille Laurent	€2,900	due	18 Oct 2026
IF Isabelle Fontaine Fontaine Equipements · Sales Director	In discussion	Referral	Camille Laurent	€5,000	3 d	17 Oct 2026

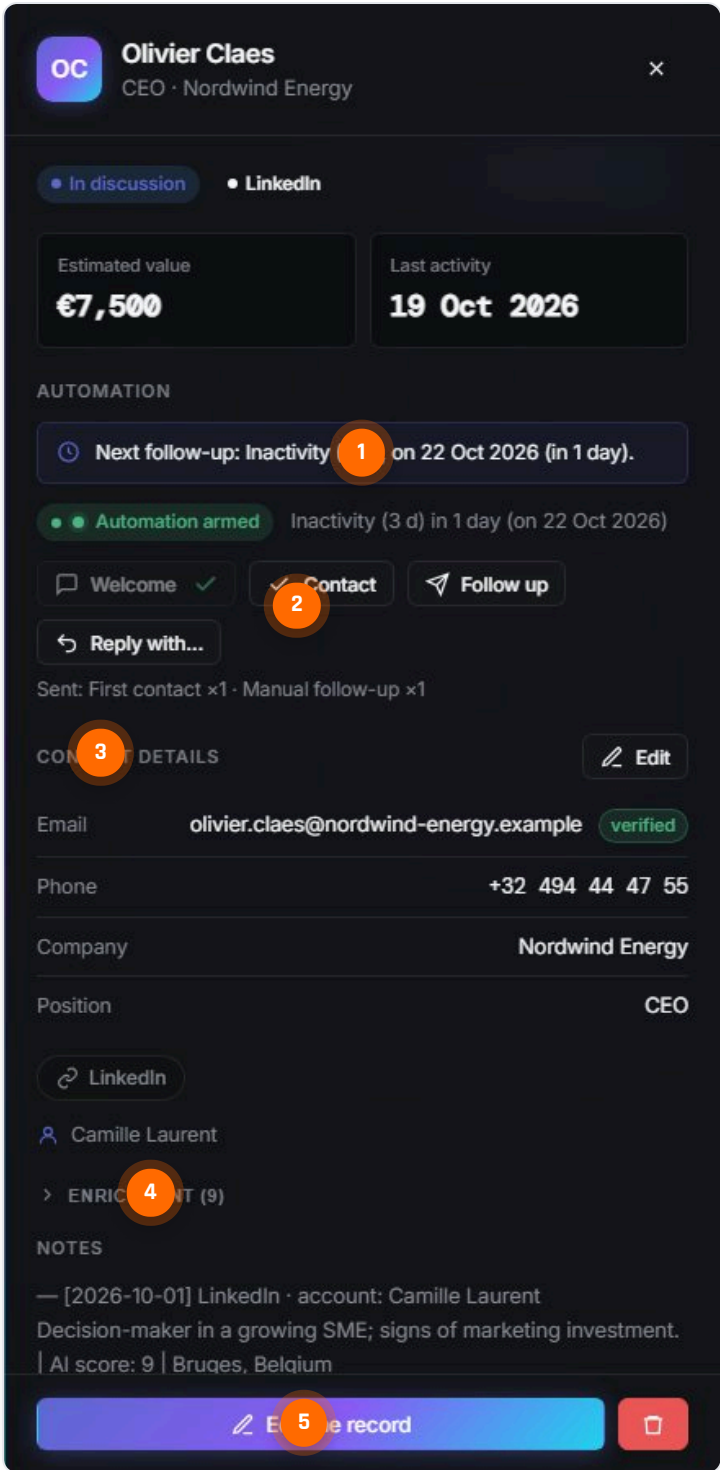
The prospect list. Search, filters and export at the top.

Search, filter, export

- **Search for a prospect or a company...** filters the list instantly.
- The **All statuses**, **All sources** and **All accounts** menus narrow down the view.
- The columns: prospect, status, source, originating account, budget, follow-up, last contact.
- **Export CSV** downloads the list for Excel or Google Sheets.
- **Add a prospect** opens a blank record: name and email are required.

The prospect record

Click a prospect: its record opens in a side panel, without leaving the list.



The prospect record.

- 1 **Automation:** the next scheduled follow-up.
- 2 **Actions:** Welcome, Contact, Follow up, Reply with...
- 3 **Contact details,** with the email address status.
- 4 **Enrichment** and notes.
- 5 **Edit the record;** the bin icon on the right deletes it.

SECTION	CONTENT
Header	Estimated value and date of last activity.

Automation	Armed or disarmed, next scheduled follow-up and number of follow-ups already sent.
Contact details	Email (with its status: verified / unverified), phone, company, job title, LinkedIn profile, website. Edit to change them.
Enrichment	Qualification score, decision level, seniority, company size and sector, location, originating channel.
Notes	Context, needs, free-form history.
Follow-up history	Every email sent, with its date and outcome.

Record actions

BUTTON	EFFECT
Welcome	Sends the first contact message and starts the follow-up sequence.
Contact	Logs a real exchange (the prospect replied, you called them). Resets the inactivity counter.
Follow up	Sends a follow-up right away (the quote follow-up if the prospect is at the "Quote sent" stage).
Reply with...	Choose a saved reply, review it (subject and message can be edited), then Send the reply from your mailbox.

 **Olivier Claes**
CEO · Nordwind Energy

×

REPLY WITH A SAVED REPLY

Close

Saved reply

☒ Meeting proposal

☐ Sending our brochure

☐ Thanks for getting back to me

Subject

Meeting about Nordwind Energy

Message (HTML) — editable before sending

```
<p>Hello Olivier,</p><p>As agreed, here is my  
online calendar so you can book our meeting: we  
will review Nordwind Energy's goals together.</p>  
<p>Speak soon,<br>Camille</p>
```

Preview

Hello Olivier,

As agreed, here is my online calendar so you can book our meeting: we will review Nordwind Energy's goals together.

Speak soon,
Camille

Send the reply

Cancel

Edit the record

Replying with a saved reply. The preview shows exactly what the prospect will receive.

UNVERIFIED EMAIL ADDRESS

If the address could not be verified, Orbit blocks automatic follow-ups to protect your domain's reputation. Correct the address with [Correct the email](#) , or confirm it with [Confirm the address](#) if you are sure it is right.

SJ

Sarah Janssens

Marketing Director · Floralis

×

Prospect

LinkedIn

AUTOMATION

⚠

This address could not be verified:
 automatic follow-ups are blocked to
 avoid a bounce, which would harm the
 reputation of your sending domain.

Correct the email

● ● Automation disarmed

address not verified — please correct or confirm it

Welcome

✓ Contact

📌 Follow up

↩ Reply with...

CONTACT DETAILS

✎ Edit

Email

sarah.janssens@floralis.example

not verified

Confirm the address

Correct

Phone

+32 484 74 17 65

Company

Floralis

Position

Marketing Director

🔗 LinkedIn

👤 Camille Laurent

> ENRICHMENT (9)

NOTES

— [2026-10-16] Leads Finder · account: Camille Laurent

Decision-maker in a growing SME; signs of marketing investment.

✎ Edit the record

🗑

Unverified address: automation stays disarmed until the address is corrected or confirmed.

To delete a prospect, use the delete button on the record: it goes to the **bin**, from which it can be restored in **Settings → Administration**.

CHAPTER 07

Automatic follow-ups

Orbit follows up with your prospects for you, from **your** mailbox, using **your** templates. The engine runs every hour.

The sequence

FOLLOW-UP	WHEN IT IS SENT
First contact	On request ("Welcome" button); or automatically for new records with a reliable address, if automatic follow-ups are enabled.
Inactivity follow-up	After 3, 7 then 14 days without news following the first contact or your last exchange.
Quote follow-up	7 days after moving to "Quote sent".
Manual follow-up	When you click "Follow up" on a record.

NO TEMPLATE, NO EMAIL

A follow-up is only sent if you have created the matching template in [Settings → My templates](#). This is deliberate: no generic email ever goes out in your name.

The follow-up log

The screenshot shows the 'Follow-ups' section of the Orbit application. The left sidebar contains navigation links for Overview, Prospecting, and Communication. The main area displays a list of follow-up emails with columns for date, status, contact name, email address, and actions. The status column includes labels like 'Manual follow-up', 'Template reply', 'First contact', and 'Inactivity'. The date column shows the date and time of the follow-up. The status column also includes a 'Sent' or 'Failed' indicator with a checkmark or cross. The 'Failed' status is highlighted in red, indicating a failure. The 'Sent' status is highlighted in green, indicating a successful follow-up.

Date	Status	Contact Name	Email Address	Action	Result	Time	
21 OCT	OC	Olivier Claes	olivier.claes@nordwind-energy.example	Manual follow-up	Template reply	✓ Sent	21 Oct 16:41
21 OCT	OC	Olivier Claes	olivier.claes@nordwind-energy.example	Manual follow-up		✓ Sent	21 Oct 16:41
20 OCT	BL	Benoît Lemaire	benoit.lemaire@garage-lemaire.example	Inactivity	Inactivity (14 d)	✓ Sent	20 Oct 17:22
20 OCT	IF	Isabelle Fontaine	isabelle.fontaine@fontaine-equipements.example	Inactivity	Inactivity (3 d)	✓ Sent	20 Oct 15:40
20 OCT	IF	Isabelle Fontaine	isabelle.fontaine@fontaine-equipements.example	Inactivity	Inactivity (3 d)	✗ Failed	20 Oct 14:45
20 OCT	CD	Céline Dubois	celine.dubois@hotel-belvedere.example	Inactivity	Inactivity (3 d)	✓ Sent	20 Oct 14:29
20 OCT	LP	Léa Peeters	lea.peeters@atelier-lumen.example	First contact		✓ Sent	20 Oct 10:00
19 OCT	SW	Sophie Wouters	sophie.wouters@orchidee-cosmetiques.example	Inactivity	Inactivity (7 d)	✓ Sent	19 Oct 17:54
19 OCT	OC	Olivier Claes	olivier.claes@nordwind-energy.example	Manual follow-up	Template reply	✓ Sent	19 Oct 16:05

The follow-up log, filterable by status.

The **All**, **Sent**, **Failed** and **Pending** tabs sort the emails. A failure shows its cause (address rejected, mailbox disconnected...): fix the record or reconnect your mailbox, then follow up again from the record.

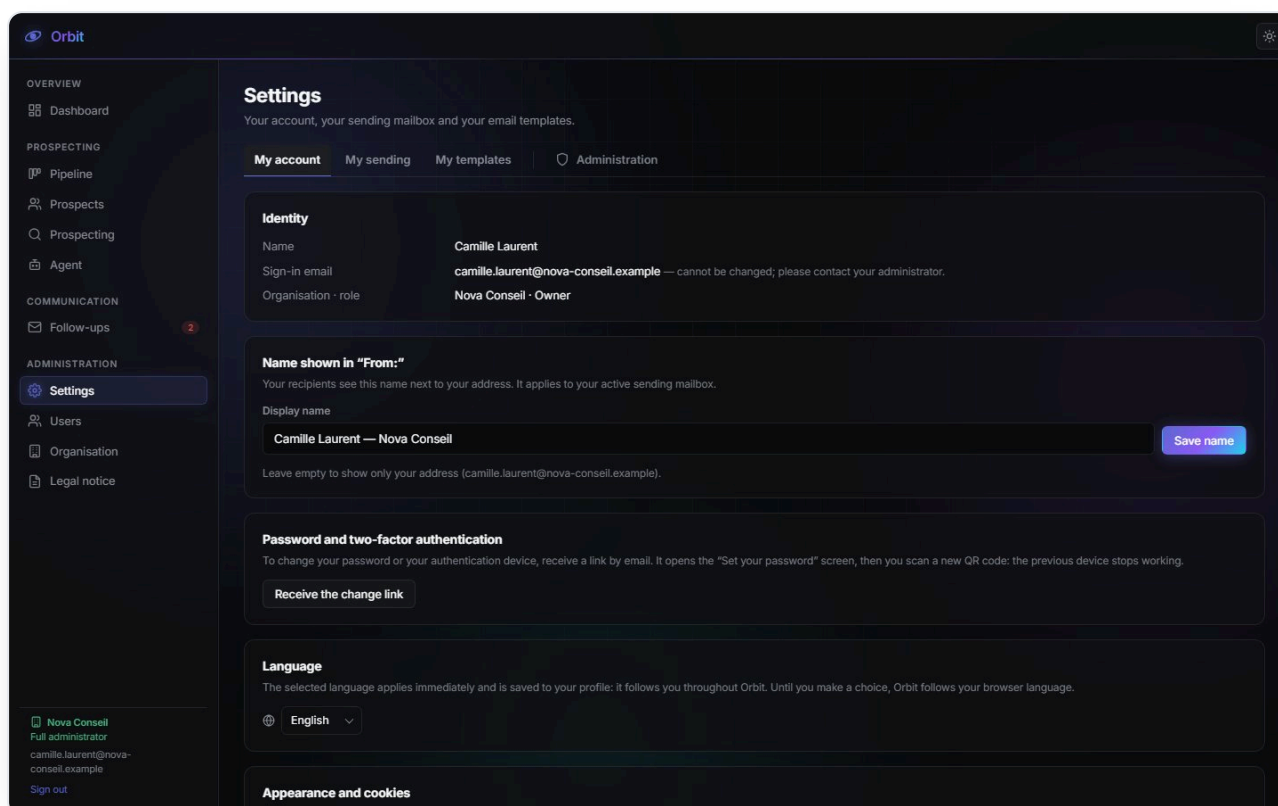
CHAPTER 08

Sending mailbox, templates and saved replies

Everything is set in **Settings**, in four tabs: **My account**, **My sending**, **My templates** and **Administration**.

My account

Your identity, the **name shown in “From:”** on your emails (e.g. “Marie Dupont — Example Ltd”), the link to change your password or two-factor device, the language, the theme and your cookie choices.

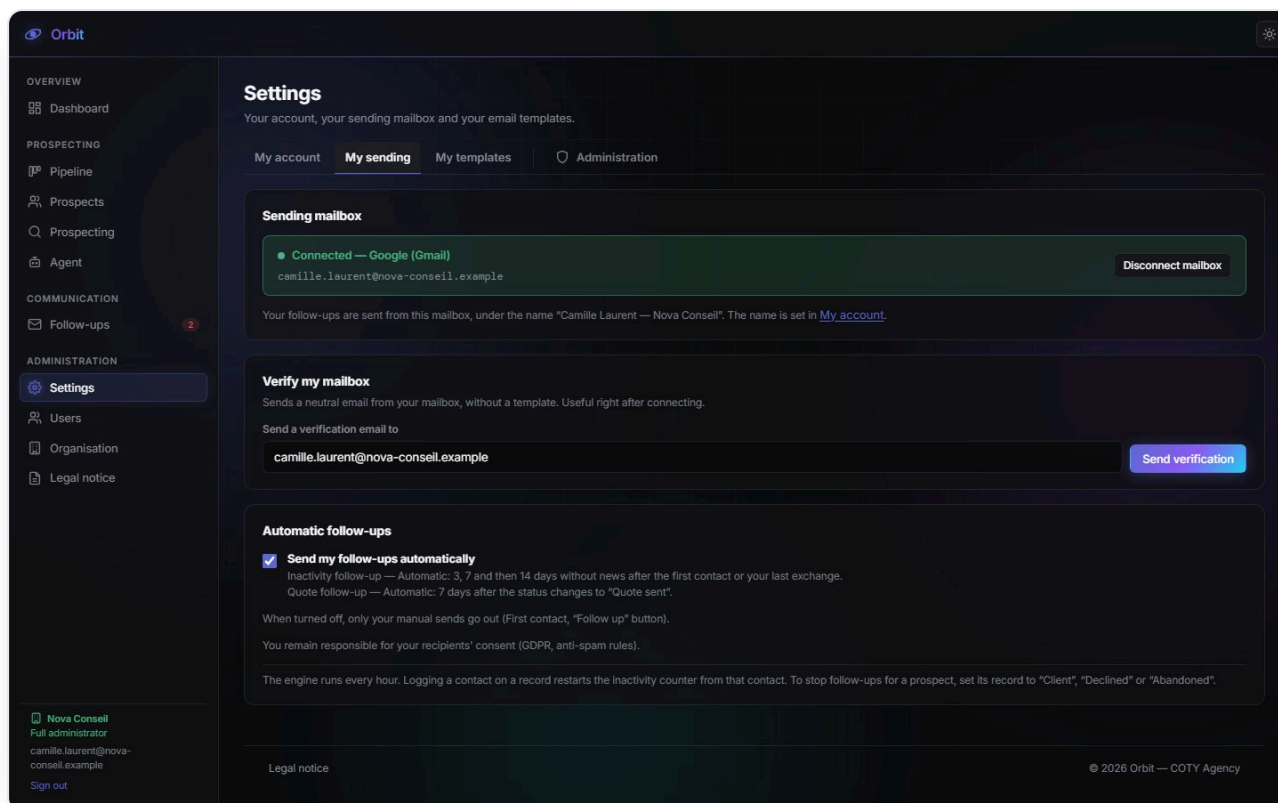


My account.

My sending: connect your mailbox

Your follow-ups are sent from **your** address, never from COTY's. Two methods:

- **One-click connection** (recommended) — **Sign in with Microsoft** or **Sign in with Google** : Outlook, Hotmail, Microsoft 365, Gmail, Google Workspace. No password is entered in Orbit.
- **SMTP server** — for OVH, Brevo, SendGrid or your own domain: server, port (465 or 587), login and password, then **Save and test** .



My sending: connected mailbox, verification and automatic follow-ups.

Once the mailbox is connected, **Send verification** sends you a neutral email to check everything works. The **Send my follow-ups automatically** switch turns the automatic sequence on or off; when it is off, only your manual emails are sent.

EMAIL OVER SMTP

Gmail rejects your usual password over SMTP: create an “app password” in your Google account (Security → 2-Step Verification), or simply use the one-click connection.

My templates

One template per type of follow-up (First contact, Inactivity follow-up, Quote follow-up, Manual follow-up). For each one:

- 1 Click the type to edit. Start from **Start from an example**, or import an **.html** file.
- 2 Write the **subject** and the **content**. Insert variables: **{prenom}** (first name), **{nom}** (full name), **{entreprise}** (company), **{poste}** (job title).
- 3 If needed, create **variants** by originating channel (website form, LinkedIn, Google Maps...). Otherwise “All variants” applies everywhere.
- 4 Click **Save template**.

Settings
Your account, your sending mailbox and your email templates.

My account My sending **My templates** Administration

Without a personal template, the corresponding follow-up is **not sent**. Start from an example, then adapt it to your business.
Variables: {prenom} {nom} {entreprise} {poste}

Follow-up	Status	Action
First contact Automatic: sent to new records as soon as their address is reliable, if your automatic follow-ups are enabled. The "Welcome" button on a record sends it immediately. It starts the follow-up sequence.	● Customised - 1 targeted variant	Edit
Inactivity follow-up Automatic: 3, 7 and then 14 days without news after the first contact or your last exchange.	● Customised	Edit
Quote follow-up Automatic: 7 days after the status changes to "Quote sent".	● Customised	Edit
Manual follow-up Sent on demand ("Follow up" button on a record).	● Customised	Edit
No reply DISABLED since 26/06/2026 — no longer sent automatically.	● Disabled	

Preview and test send
What will actually be sent for this follow-up, with a real or sample prospect.

Follow-up: Inactivity follow-up Prospect: Sample — Jean Dupont (Acme SAS)

Will be sent: your personal template.
Subject: **Following up, Jean**

Hello Jean,
I'm following up about Acme SAS: have you had a chance to think about my suggestion of a call?

My templates: the status of each follow-up, the editor and the preview.

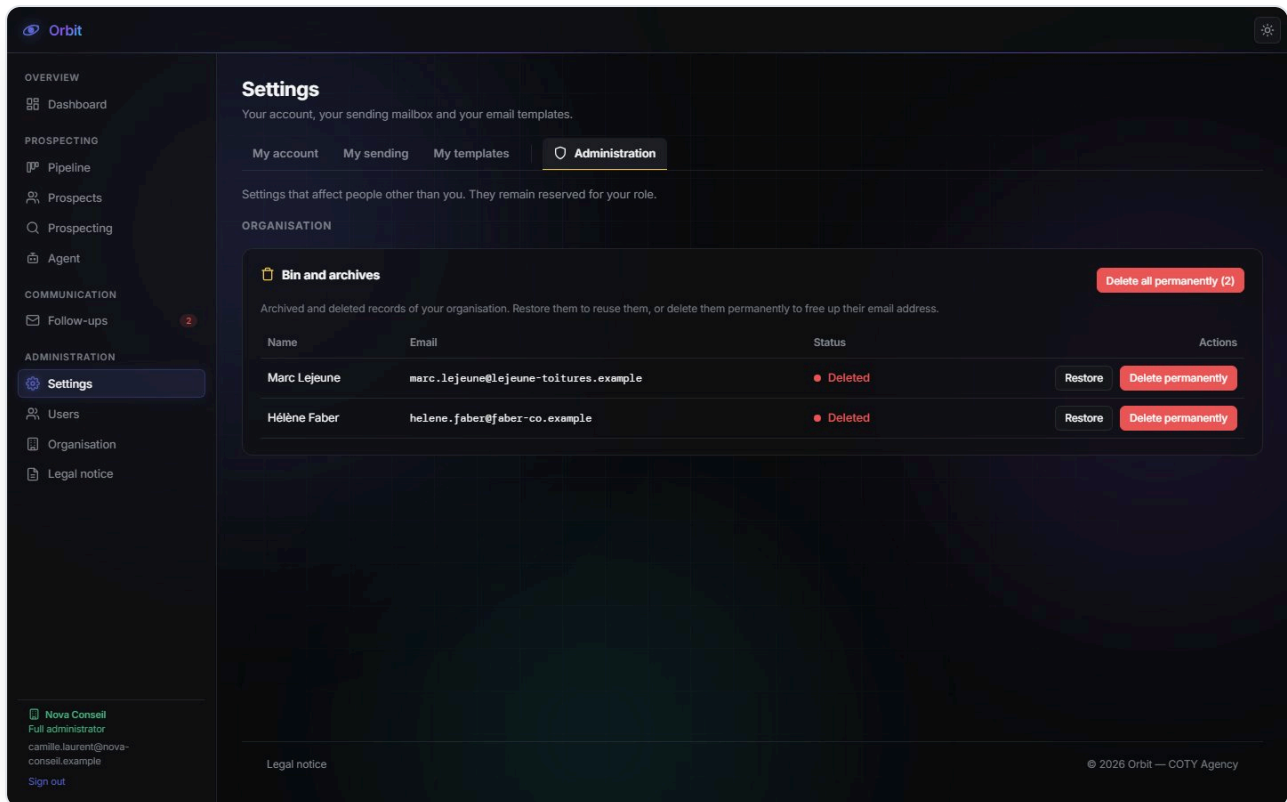
The **Preview and test send** block shows exactly what will be sent, with a real or fictitious prospect, and lets you **Send the test** to your own address.

My saved replies

Ready-made replies for your conversations (e.g. "Thank you, here is my availability"). Create them with **Create a saved reply** ; use them from a record with **Reply with...** .

Administration

For administrators only: the organisation's **bin and archives**. **Restore** brings a record back into use; **Delete permanently** erases it along with its history (irreversible).

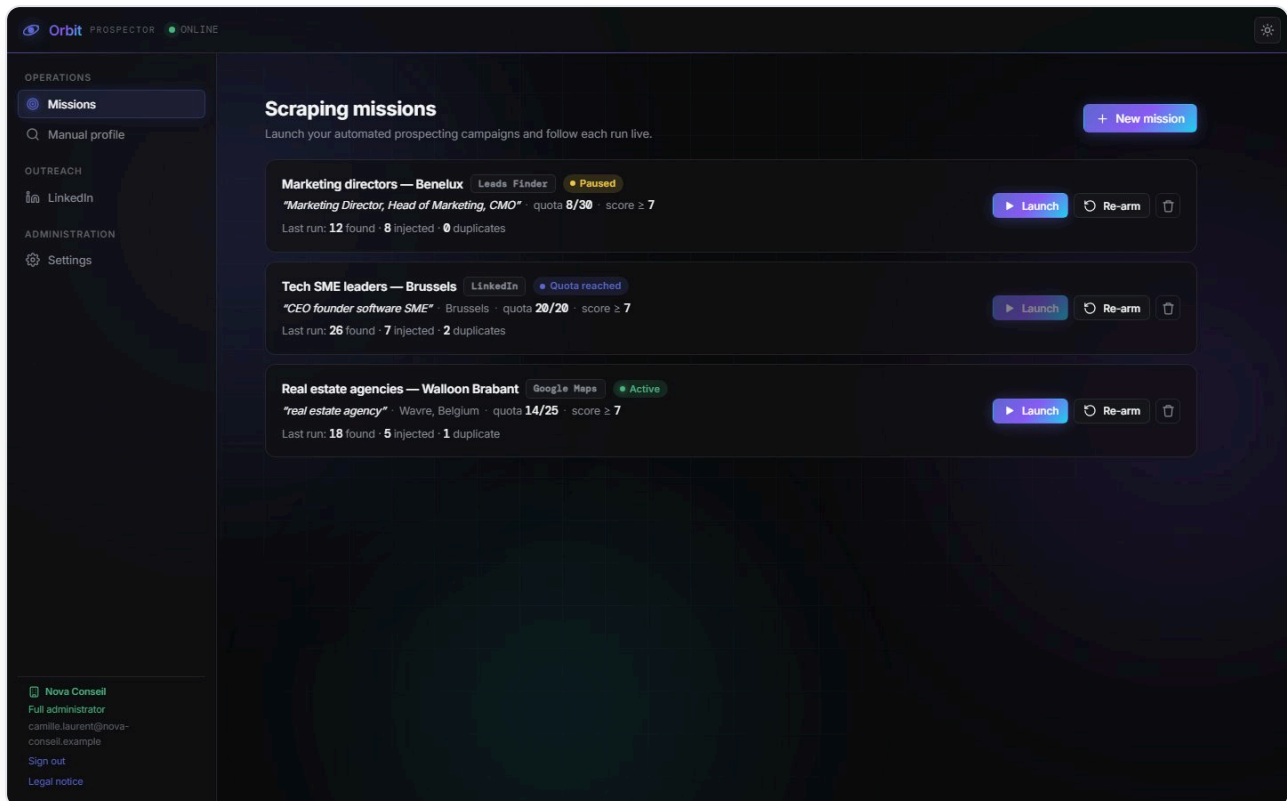


Administration: the organisation's bin and archives.

CHAPTER 09

Prospector: search missions

Open the Prospector from the **Prospecting** entry of the CRM menu. A **mission** is an automated search: Orbit finds profiles, scores them with AI and creates records for the best ones in the CRM.



Missions, with the result of the last run.

The three channels

CHANNEL	BEST FOR
Google Maps	SMEs, shops and local tradespeople ("plumber" in "Brussels").
LinkedIn	Executives and decision-makers in a sector.
Leads Finder	A B2B database with email and phone, filtered by job title, country, industry, seniority and company size.

Create a mission

- 1 Click **New mission**.
- 2 Give it a **name** (e.g. "Plumbers Brussels") and choose the **channel**.

- 3 Google Maps and LinkedIn: enter the **query** and the **location**. Leads Finder: the **job titles**, countries, industries, seniority, company size and options (email required, verified emails only, phone required).
- 4 Set the **quota** (number of records wanted) and the **score threshold** (1 to 10): only profiles above the threshold become records.
- 5 Adjust the **qualification prompt** if needed (what the AI should assess), then **Create the mission**.

The screenshot shows the 'Scraping missions' section of the Orbit PROSPECTOR interface. The left sidebar contains navigation links for OPERATIONS (Missions), OUTREACH (LinkedIn), and ADMINISTRATION (Settings). The main area is titled 'New scraping mission' and includes a '+ New mission' button. The form contains the following fields and options:

- Name ***: Text input with placeholder 'e.g. Plumbers Brussels'.
- Channel**: Dropdown menu with 'Leads Finder (B2B database — email + phone)' selected.
- Job titles (comma-separated) ***: Text input with placeholder 'e.g. CEO, Founder, Managing Director'.
- Countries**: Text input with placeholder 'e.g. Belgium, France'.
- Industries**: Text input with placeholder 'e.g. Marketing'.
- Seniority**: Radio buttons for Owner, C-level, Partner, VP, Director, and Manager. 'Owner' and 'C-level' are selected.
- Company size**: Radio buttons for 1-10, 11-50, 51-200, 201-500, 501-1000, 1001-5000, 5001-10000, and 10001+. '1-10' and '11-50' are selected.
- Options**: Checkboxes for Email required, Verified emails only, and Phone required. 'Email required' and 'Verified emails only' are checked.
- Advanced filters**: Expandable section.
- How many leads?**: Text input with placeholder '10'.
- Quota**: Text input with placeholder '10'.

At the bottom right of the form are 'Cancel' and 'Create the mission' buttons. The user profile 'Nova Conseil' is visible in the bottom left corner.

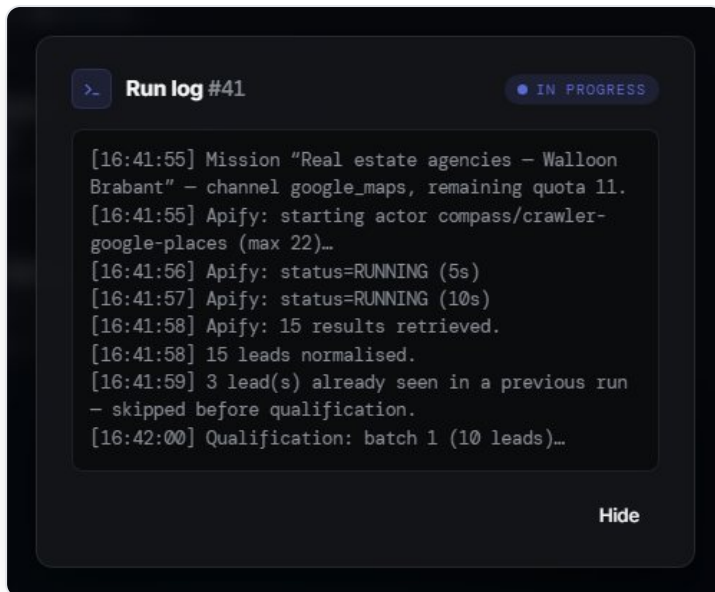
New Leads Finder mission, with the free count before launching.

HOW MANY LEADS?

With Leads Finder, the **How many leads?** button counts the available profiles for free, before anything is spent. Adjust your filters until you get a useful volume.

Launch and follow a mission

Launch starts the search: the **run log** appears live (profiles found, qualified, injected, duplicates skipped). At the end, the mission card shows the outcome of the last run.



The run log, updated live.

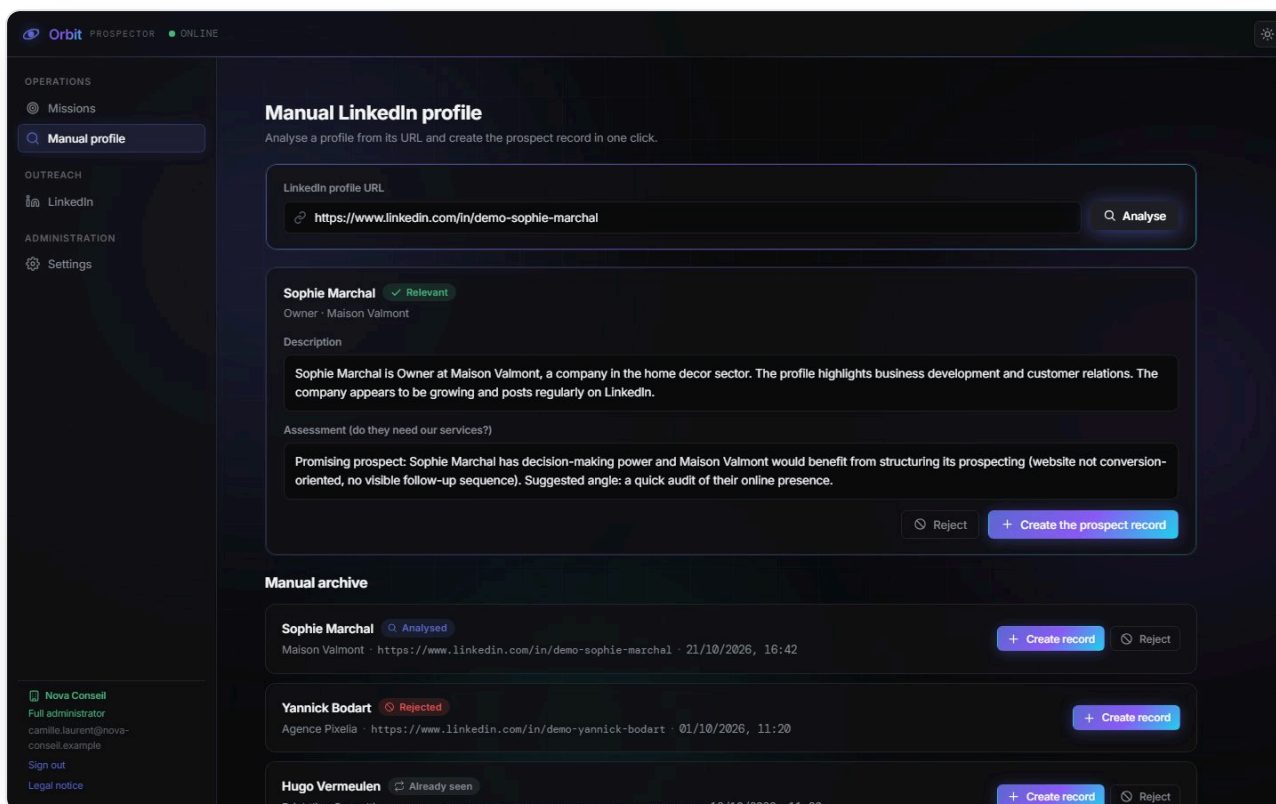
A mission whose quota is reached switches to **Quota reached**. **Re-arm** resets its counter to zero for a new batch.

CHAPTER 10

Prospector: manual LinkedIn profile

Spotted an interesting profile on LinkedIn? Paste its address: Orbit analyses it and creates the record in one click.

- 1 **Manual profile** menu: paste the **LinkedIn profile URL**, then **Analyse**.
- 2 Orbit shows a **description** of the profile and an **assessment**: does this person need your services? The profile is marked **Relevant** or **Not very relevant**.
- 3 Click **Create the prospect record** to add it to the CRM, or **Reject** to set it aside.



Profile analysis: description, assessment and decision.

Analysed profiles stay in the **manual archive**: a profile you have already seen is flagged to avoid duplicates.

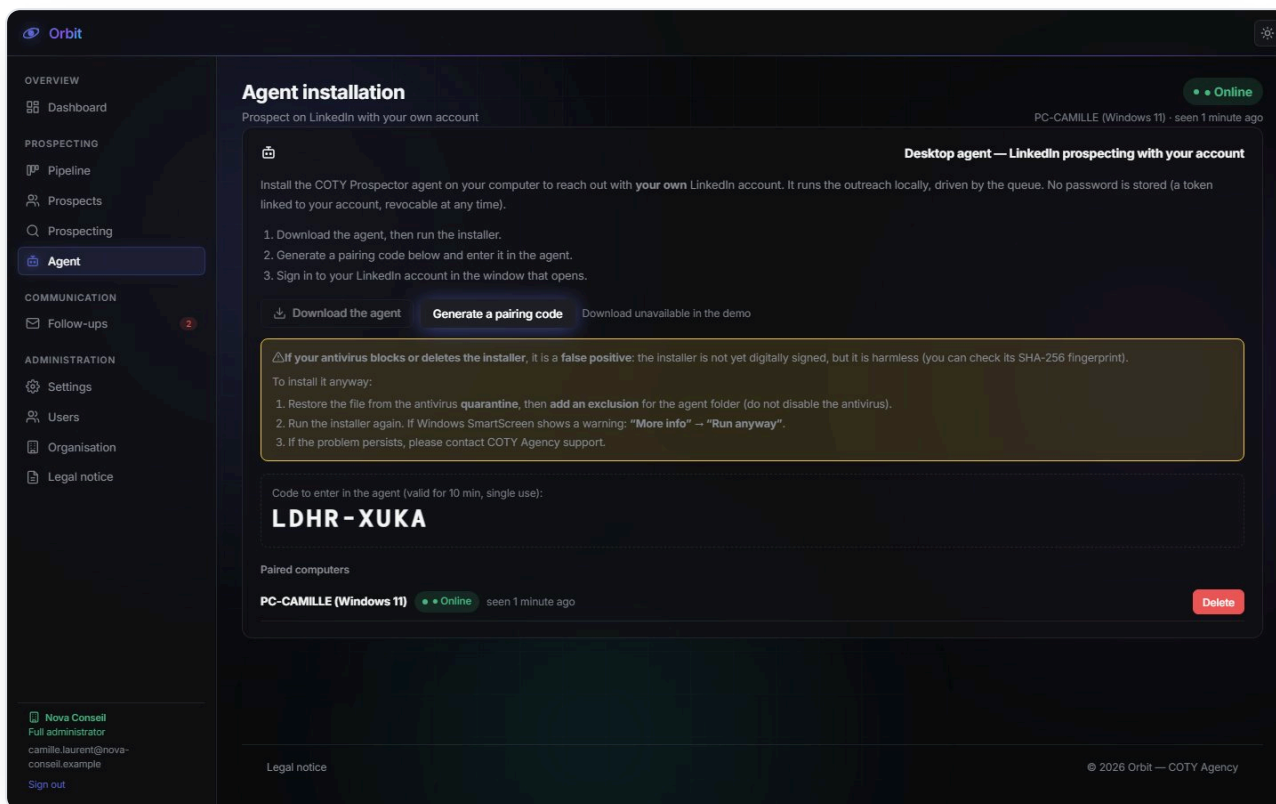
CHAPTER 11

Prospector: LinkedIn outreach and desktop agent

LinkedIn outreach sends connection requests and the first message from your own account, through a small agent installed on your computer. You stay in control of every invitation.

Install the desktop agent

- 1 In the CRM, **Agent** menu: click **Download the agent** and run the installer.
- 2 Click **Generate a pairing code** and enter the code in the agent (valid for a few minutes, single use).
- 3 Connect your LinkedIn account in the window that opens. Orbit stores no password.



Agent installation and list of paired computers.

ANTIVIRUS

If your antivirus blocks the installer, restore it from quarantine and add an exclusion for the agent's folder. If Windows SmartScreen warns you: "More info" then "Run anyway". If in doubt, contact support.

The outreach queue

LinkedIn outreach: session status, today's quotas and the prospect queue.

- 1 **Import from the CRM** adds prospects who have a LinkedIn profile to the queue.
- 2 Click **Invite**: the connection request is sent automatically from your agent (without a note).
- 3 Orbit checks for acceptance every 2 hours (or right away with **Check**).
- 4 Once the connection is accepted, the **first message** goes out after a 5-minute delay. **Pause** stops the timer, **Resume** restarts it, the cancel button removes the automatic sending. If you see the acceptance before Orbit does, click **Accepted**.
- 5 Then it is **over to you**: the conversation continues in LinkedIn.

STATUS	MEANING
To contact / To invite	The prospect is waiting for your invitation.
Invitation sent	Waiting for acceptance.
Connected	Accepted: the first message is about to go out.
First message sent	The first message has been sent.
Manual handover (your turn)	The rest happens by hand in LinkedIn.

Already invited the person directly on LinkedIn? Click **Already invited** so that tracking takes over. Prospects belonging to another team member are visible but locked (private messaging).

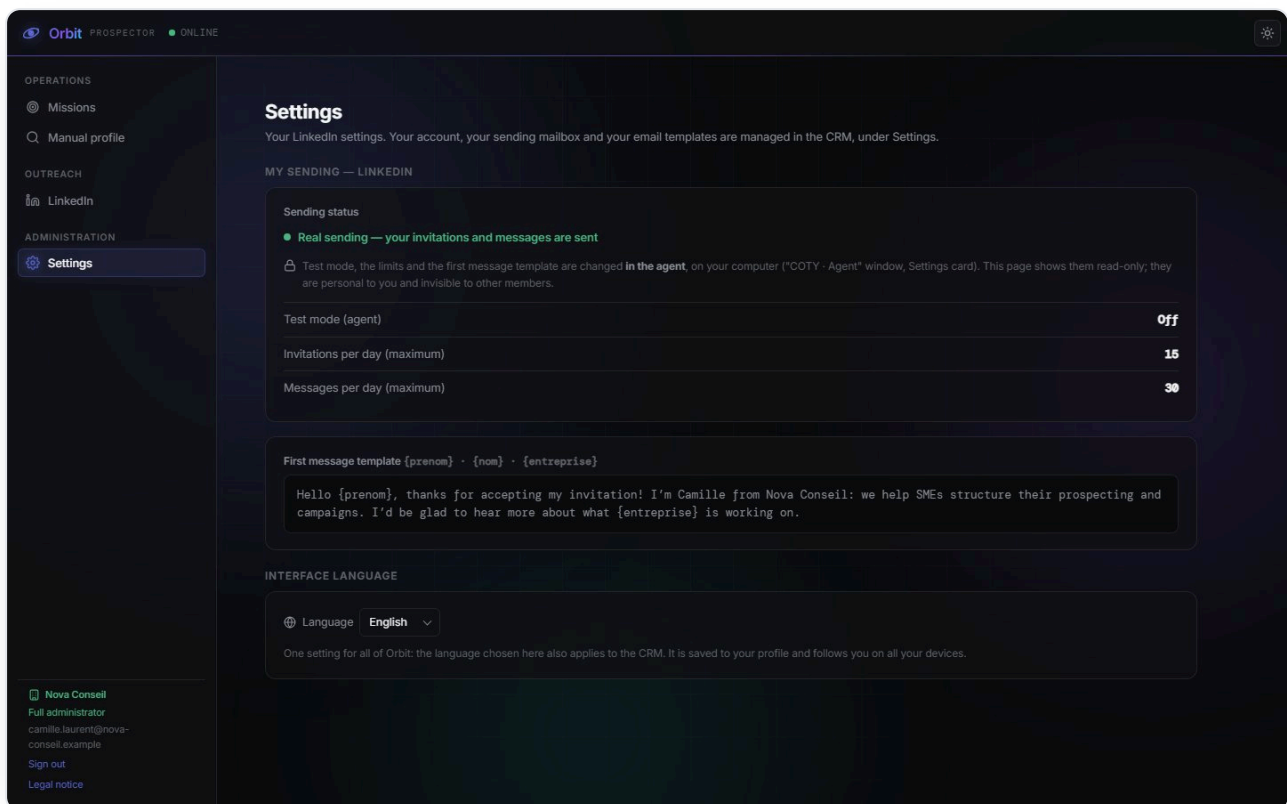
Reset puts a record back to “To contact” to replay the whole flow.

STAYING WITHIN THE LIMITS

The quotas shown (invitations today and this week, messages today) and the sending window during business hours protect your LinkedIn account. The agent's **test mode** lets you try everything without sending anything; the first message template is personalised in the agent, and no message is sent until it is.

Prospector settings

The Prospector's **Settings** menu shows the sending status (real or test mode), your agent's limits, the first message template and the interface language (shared across all of Orbit).



Prospector settings.

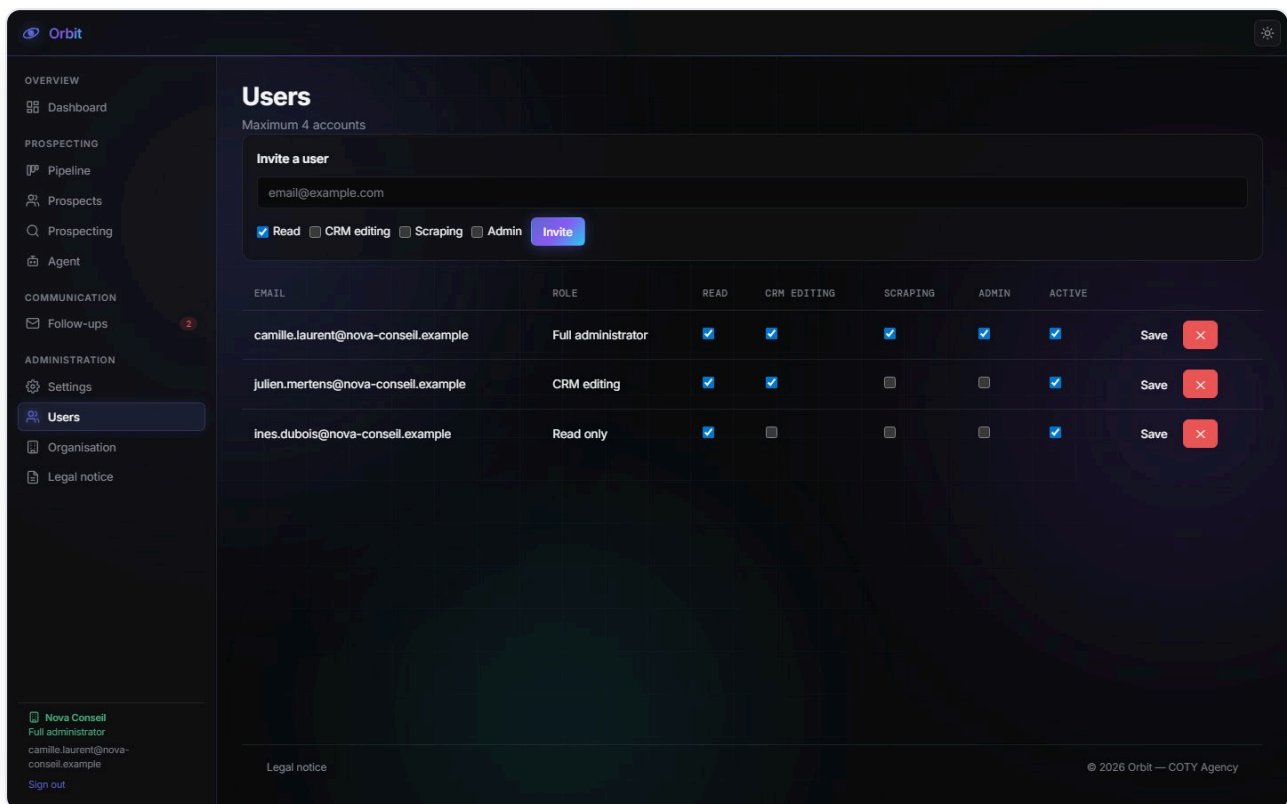
CHAPTER 12

Team, roles and organisation

Each organisation has its own sealed workspace. The administrator invites colleagues and chooses what each of them can do.

Invite a user

- 1 **Users** menu: enter the person's email address, tick their permissions (**Read**, **CRM editing**, **Scraping**, **Admin**) and click **Invite**.
- 2 They receive an activation email (see chapter 2).
- 3 To change their permissions later, tick or untick the boxes on their row, then save. Untick **Active** to suspend an account without deleting it; the red cross deletes it permanently.



The screenshot displays the 'Users' management page in the Orbit application. On the left, a sidebar contains navigation links for Overview, Prospecting, Communication, and Administration. The 'Users' link is highlighted. The main content area shows a table of users with columns for Email, Role, Read, CRM Editing, Scraping, Admin, and Active. There are three users listed: camille.laurent@nova-conseil.example (Full administrator), julien.mertens@nova-conseil.example (CRM editing), and ines.dubois@nova-conseil.example (Read only). Each user row has a 'Save' button and a red 'X' button. Above the table, there is a form to 'Invite a user' with a text input for email and checkboxes for Read, CRM editing, Scraping, and Admin, followed by an 'Invite' button.

EMAIL	ROLE	READ	CRM EDITING	SCRAPING	ADMIN	ACTIVE	
camille.laurent@nova-conseil.example	Full administrator	☒	☒	☒	☒	☒	Save X
julien.mertens@nova-conseil.example	CRM editing	☒	☒	☐	☐	☒	Save X
ines.dubois@nova-conseil.example	Read only	☒	☐	☐	☐	☒	Save X

Users and their permissions.

PERMISSION	WHAT IT ALLOWS
Read	View the dashboard, the pipeline and the records.
CRM editing	Create and edit prospects, send follow-ups, manage one's own sending settings.
Scraping	Use the Prospector and the LinkedIn agent.

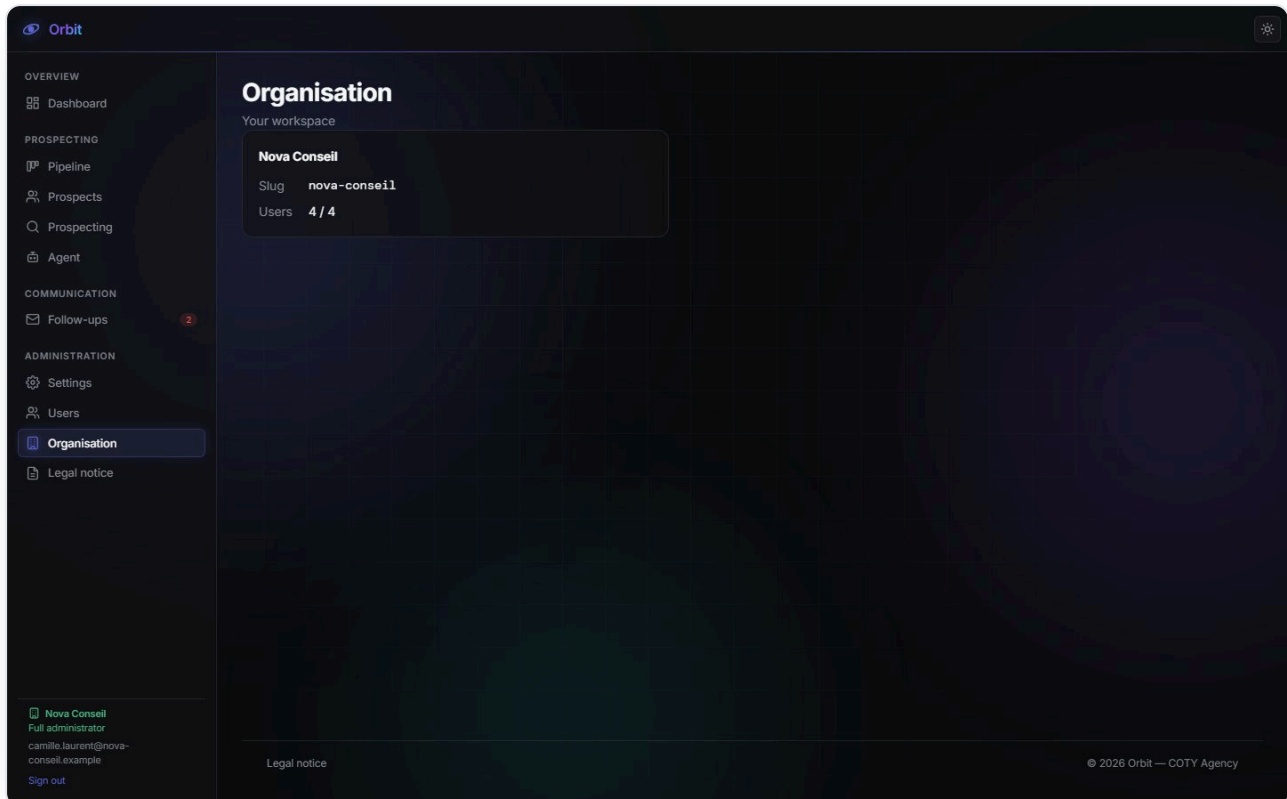
Admin

All of the above, plus the organisation's users and bin.

The number of accounts depends on your subscription; it is shown at the top of the page.

Organisation

The **Organisation** menu, visible to the workspace owner, summarises your organisation: its name, its identifier and its users.



Your organisation.

CHAPTER 13

Security and GDPR

- **Mandatory two-factor authentication** for every user.
- **Separation by organisation:** the database itself prevents one client from seeing another's data.
- **Per-user permissions:** everyone sees and does only what their role allows.
- **Encrypted sending credentials;** the one-click connection means you never even hand over a password.
- **Data hosted in Europe** (European Union).
- **Emails sent from your mailbox:** never in COTY's name.

YOUR GDPR RESPONSIBILITY

You remain responsible for processing your prospects' data: legal basis for B2B prospecting (legitimate interest), informing the people concerned, honouring objection and deletion requests. Permanently delete a record (bin) when a person asks.

CHAPTER 14

FAQ and troubleshooting

**My follow-ups are not being sent.**

Check, in this order: a mailbox is connected (**My sending**); "Send my follow-ups automatically" is on; the follow-up's template exists (**My templates**); the prospect's address is verified (otherwise automation is disarmed).

A card shows the "Automation disarmed" badge.

The prospect's email is missing or could not be verified. Open the record and correct or confirm the address.

My two-factor code is rejected.

Make sure your phone's time is set automatically, wait for the next code and try again. If you lost your phone: **Settings** → **My account** → **Receive the change link**, or contact your administrator.

A follow-up failed.

Open **Follow-ups** → **Failed** to read the cause. Most often: address rejected by the recipient's server, or mailbox disconnected (reconnect it in **My sending**).

My mission finds nothing.

Broaden the query or the location, lower the score threshold, or use "How many leads?" (Leads Finder) to calibrate your filters before launching.

The LinkedIn invitation is not sent.

Check that the agent is online (Agent menu), that the LinkedIn session is "connected", that the agent's test mode is off and that you are within the sending window and under today's quotas.

I deleted a prospect by mistake.

An administrator can restore it from **Settings** → **Administration** → **Bin and archives**.

Can I export my data?

Yes: **Prospects** → **Export CSV**.

CHAPTER 15

Support



A question, a problem, an idea for improvement? Write to us:

- Email: contact@coty.agency
- Form: coty.agency/en/contact.html
- Online demo: coty.agency/demo-orbit

We reply within one business day. Please include your organisation's name, what you were doing and, if possible, a screenshot — but never send us a password or a security code.



COTY Agency



Tailor-made automation and AI for SMEs.

coty.agency · contact@coty.agency

The screenshots in this guide come from the public demo and contain only fictitious data.