

ProjexaGo

OFFICIAL DOCUMENTATION

User Manual

Complete guide to managing your business on ProjexaGo

VERSION

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English

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CHAPTER 01

Chapter 1 — Introduction & Product Overview

What is ProjexaGo?

ProjexaGo is the **commerce operating system for growing businesses**. It is a multi-tenant SaaS platform that enables any business — without technical knowledge — to launch a complete public storefront, manage orders, handle customers, and run the entire commercial cycle from a single place.

Unlike traditional store builders, ProjexaGo is not limited to online payment gateways. It is designed specifically for businesses that operate with **manual payments** — bank transfers, digital wallets, in-person payments — and need a system that handles the complete flow: from order placement to confirmed payment.

***In short:** ProjexaGo gives any business a public storefront, product catalog, shopping cart, manual payment workflow, customer notifications, AI tools, analytics, and a powerful the platform — all from a single configuration, without writing a single line of code.*

Who is ProjexaGo for?

ProjexaGo is designed for:

Business Type	Example Use
Local retailers & cafés	Bank transfer and wallet payments with delivery tracking
Boutiques & makers	Visual catalog, featured products and AI-written descriptions
Distributors	Order pipeline, customer history and low-stock alerts
Restaurants	Menus, manual payment instructions and order status notifications
Pop-ups & campaigns	Branded portal live in minutes with a custom domain
Services & consulting	Sell services with manual payment tracking and confirmation

Value Proposition

- **No code.** Everything — branding, catalog, payments, emails and AI — is configured through the wizard and management panel.
- **Live in minutes.** The guided wizard generates your complete portal in a single session.
- **Multi-tenant & isolated.** Each business is an independent tenant. Your products, orders, customers and settings are exclusively yours.
- **Bring your own email & AI.** Connect your own SMTP provider, OpenAI or Anthropic. Keys are encrypted at rest.
- **0% transaction fees.** ProjexaGo doesn't charge commission on your sales.
- **Custom domain ready.** On paid plans, connect your own domain with automatic SSL.

System Components

ProjexaGo consists of three main elements that work together:

1. The Management panel (Owner Panel)

The web interface where you manage your entire business:

- Dashboard with real-time KPIs and metrics
- Product, category and catalog management
- Order pipeline with status workflow
- Payment proof review queue
- Customer CRM
- Complete portal configuration
- Integrated AI tools
- Reports and analytics

URL: `https://app.projexago.com`

2. The Public Portal (Customer Storefront)

The public store your customers see:

- Branded landing page with hero, sections and CTAs
- Navigable catalog with search and filters
- Product pages with images and variants
- Shopping cart and checkout process
- Customer registration and login
- Order tracking with unique token
- Payment proof upload
- Order history and invoice downloads
- Support cases from the store

URL: `https://[your-store].projexago.com` or your custom domain

3. The Mobile App (ProjexaGo App)

The native app for managing your business from your phone:

- Dashboard with daily sales and metrics
- Order viewing and management
- Product catalog
- Customer list
- Portal settings

- Available as PWA (install from browser) and coming soon to App Store and Google Play
-

General Workflow

The complete cycle of an operation in ProjexaGo follows these steps:

1. Create your organization
 - └ Your account is created automatically as owner
2. Configure your branding
 - └ Logo, colors, typography
3. Run the creation wizard
 - └ Design, layout, categories, products, payment methods
4. Generate your portal
 - └ Public storefront + management panel ready
5. Publish your landing
 - └ ProjexaGo subdomain or your own custom domain
6. Customers register & shop
 - └ Browsers create accounts, browse the catalog and place orders
7. Receive orders
 - └ Send instructions → customer pays → uploads proof
8. Manage from the platform
 - └ Approve payments, update statuses, full tracking

System Requirements

Management panel (web)

- **Browser:** Google Chrome 110+, Firefox 115+, Safari 16+, Edge 110+
- **Internet:** Broadband recommended (minimum 5 Mbps)
- **Resolution:** 1280×720 minimum; 1440×900 or higher recommended

Public Portal (customers)

- Any modern browser, including mobile
- No special installation requirements

Mobile App

- **iOS:** 15.0 or higher (install from Safari as PWA)
- **Android:** Chrome 100+ (install from Chrome as PWA)
- App Store and Google Play: coming soon

Manual Conventions

Throughout this manual you will find the following indicators:

 **Tip:** Recommendations to get the most out of the platform.

 **Important:** Critical information you must be aware of.

 **Note:** Additional clarifications about system behavior.

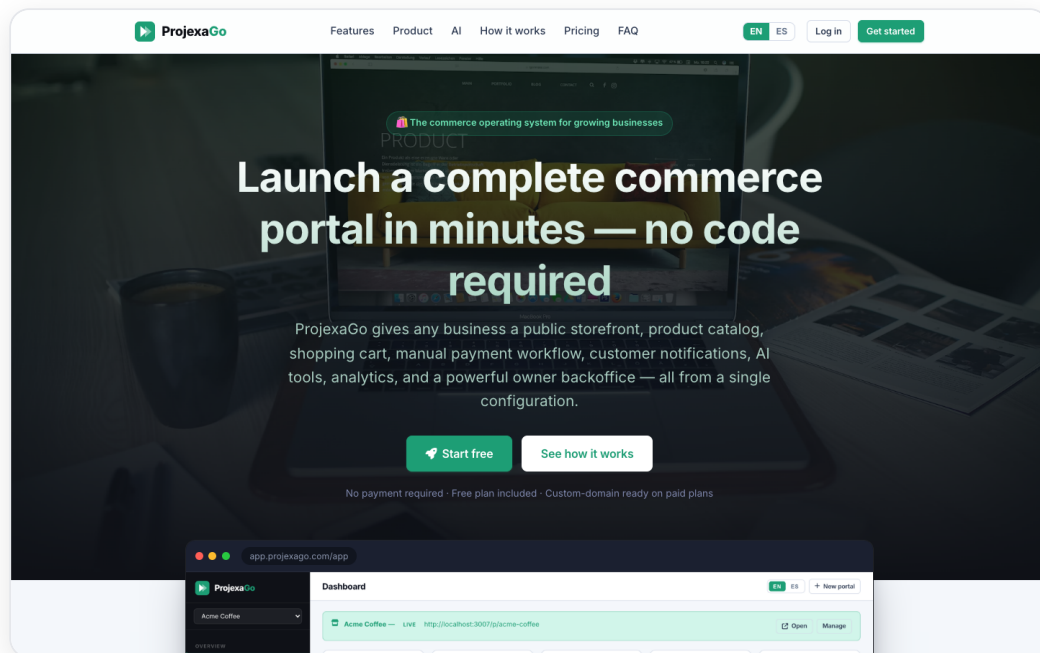
 **Workflow:** Description of a multi-step process.

Next: [Chapter 2 — The Landing Page →](#)



CHAPTER 02

Chapter 2 — The Landing Page (projexago.com)

*02 landing hero*

Overview

The ProjexaGo landing page at <https://projexago.com> is the official entry point to the product. It is designed so any visitor can quickly understand the value proposition, explore features, compare plans and make the decision to get started.

Main Navigation

At the top of the page you'll find a fixed navigation bar:

Element	Function
ProjexaGo (logo)	Returns to the top of the page
Features	Scrolls to the features section
Product	Scrolls to the product description section
AI	Scrolls to the AI section
How it works	Shows the 8-step product flow
Pricing	Scrolls to the plans and pricing section
FAQ	Shows frequently asked questions
EN / ES	Language switcher (English / Spanish)
Log in	Access the panel if you already have an account
Get started	Starts the registration process (primary CTA)

Hero Section

Tagline:

 *The commerce operating system for growing businesses*

Headline:

Launch a complete commerce portal in minutes — no code required

Description:

ProjexaGo gives any business a public storefront, product catalog, shopping cart, manual payment workflow, customer notifications, AI tools, analytics, and a powerful the platform — all from a single configuration.

Action buttons:

- **Start free** — Goes to registration (no credit card required)
- **See how it works** — Scrolls to the "How it works" section

Note below buttons:

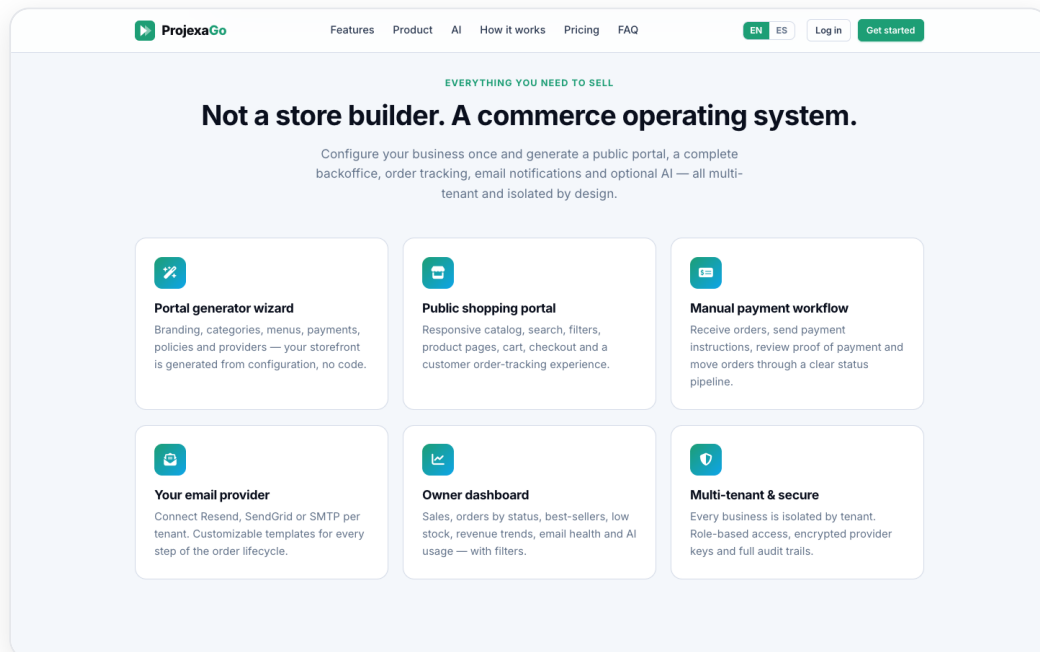
No payment required · Free plan included · Custom-domain ready on paid plans

Visual highlights:

- Launch in minutes — no code
- Multi-tenant & isolated by design
- Bring your own email & AI
- Custom-domain ready

Features Section

Title: "EVERYTHING YOU NEED TO SELL" **Subtitle:** *Not a store builder. A commerce operating system.*



02 landing features

1. Portal Generator Wizard *Branding, categories, menus, payments, policies and providers — your store is generated from your configuration, no

code required.*

2. Public Shopping Portal

Responsive catalog, search, filters, product pages, cart, checkout and order tracking for the customer.

3. Manual Payment Workflow

Receive orders, send payment instructions, review proof and advance orders through a clear status flow.

4. Your Own Email Provider

Connect Resend, SendGrid or SMTP per tenant. Customizable templates for every step of the order cycle.

5. Owner Panel

Sales, orders by status, best sellers, low stock, revenue trends, email health and AI usage — with filters.

6. Multi-tenant & Secure

Each business is isolated by tenant. Role-based access, encrypted provider keys and complete audit logs.

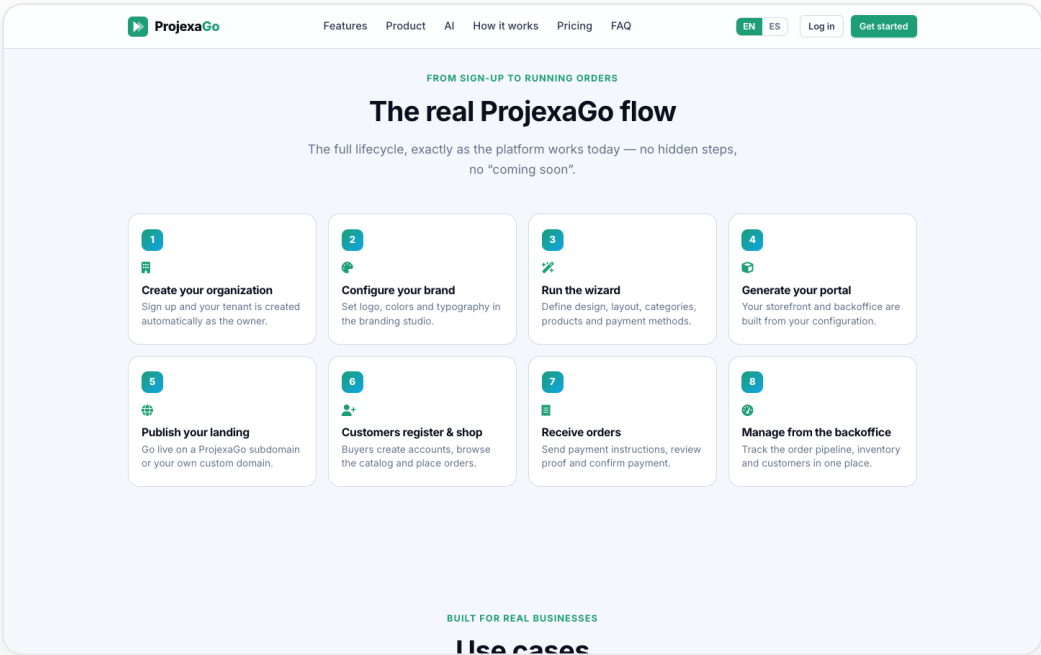
Product Preview Section

Four views showcasing real interface screenshots:

1. **Design your portal with live preview** — The wizard shows your store in real time as you configure it
2. **A fast, branded storefront for your customers** — The responsive public store with catalog and cart
3. **Operate everything from one place** — The platform with dashboard, orders and management
4. **Activate AI when you're ready** — The integrated AI assistant with analysis and content generation

How It Works Section

Title: "FROM REGISTRATION TO MANAGING ORDERS" **Subtitle:** *The real ProjexaGo flow — the complete cycle, as the platform works today — no hidden steps, no "coming soon".*



02 landing how it works

Step	Action	Description	----- ----- -----	**1**	Create your organization
	2	Configure your branding	Set logo, colors and typography in the brand studio	**3**	Run the wizard
	4	Generate your portal	Your storefront and management panel are built from your configuration	**5**	Publish your landing
	6	Customers register & shop	Buyers create accounts, browse the catalog and place orders	**7**	Receive orders
	8	Manage from the platform	Track the order pipeline, inventory and customers in one place		

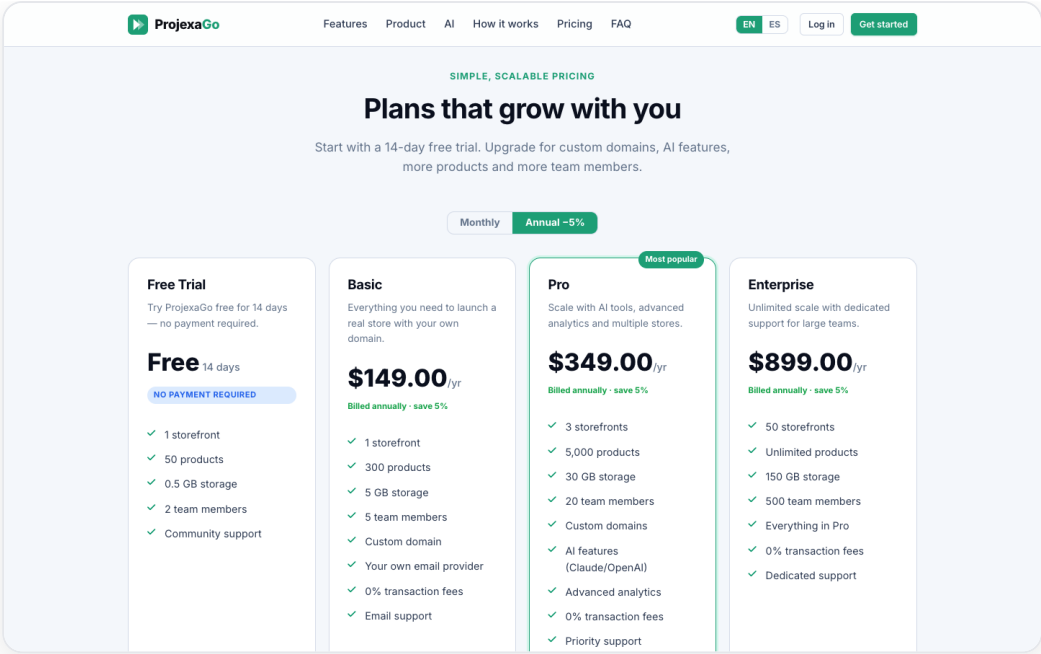
Use Cases Section

Title: "BUILT FOR REAL BUSINESSES"

Use case	Description
Local retailers & cafés	Bank transfer and wallet payments with proof review and delivery tracking
Boutiques & makers	Beautiful catalog, featured products and AI-written descriptions
Distributors	Order pipeline, customer history and inventory alerts in one management panel
Restaurants	Menus, manual payment instructions and order status notifications
Pop-ups & campaigns	Spin up a branded portal in minutes with a custom domain
Services & consulting	Sell services with manual payment tracking and confirmation

Pricing Section

Title: "Plans that grow with you"



02 landing pricing

Free Trial *Try ProjexaGo free for 14 days — no payment required.*

Feature	Value
Price	Free, 14 days
Stores	1
Products	50
Storage	0.5 GB
Team members	2
Support	Community

Basic Plan — \$149.00/year

Everything you need to launch a real store with your own domain.

Feature	Value
Price	\$149.00/year (billed annually · save 5%)
Stores	1
Products	300
Storage	5 GB
Team members	5
Custom domain	✓
Own email provider	✓
Transaction fees	0%
Support	Email

Pro Plan — \$349.00/year ★ Most Popular

Scale with AI tools, advanced analytics and multiple stores.

Feature	Value
Price	\$349.00/year (billed annually · save 5%)
Stores	3
Products	5,000
Storage	30 GB
Team members	20
Custom domains	✓
AI features (Claude/OpenAI)	✓
Advanced analytics	✓
Transaction fees	0%
Support	Priority

Enterprise Plan — \$899.00/year

Unlimited scale with dedicated support for large teams.

Feature	Value
Price	\$899.00/year (billed annually · save 5%)
Stores	50
Products	Unlimited
Storage	150 GB
Team members	500
Everything in Pro	✓
Transaction fees	0%
Support	Dedicated

💡 **Tip:** If you're not sure which plan to choose, start with the **Free Trial**. You have 14 full days to explore the platform without entering payment information.

📌 **Note:** Extra storage is available at \$1.00/GB/month billed in arrears. Additional stores can be purchased for \$5.00/month.

FAQ Section

Do I need to write any code?

No. Everything — branding, catalog, payments, emails and AI — is configured through the wizard and management panel.

How do payments work?

ProjexaGo uses a manual payment workflow. A customer places an order, you send payment instructions (bank transfer, wallet, or in person), the customer pays outside the system and uploads proof, and you review and approve it from your payment queue. Every step updates the order status and notifies the customer by email.

Is my data isolated from other businesses?

Yes. ProjexaGo is multi-tenant by design. Every product, order, customer, email and AI setting is scoped to your tenant and never shared.

Can I use my own email and AI providers?

Yes. Connect Resend, SendGrid or SMTP for email, and bring your own OpenAI or Anthropic key for AI. Keys are encrypted at rest.

Can I use a custom domain?

Yes. On paid plans, add your domain, point the DNS, and ProjexaGo automatically provisions an SSL certificate. The process takes minutes.

Footer

Product navigation: [Features](#) · [Pricing](#) · [AI](#) **Account:** [Log in](#) · [Sign up](#) **Legal:** [Terms & Conditions](#) · [Privacy Policy](#) · [Acceptable Use](#) **Copyright:** © 2026 ProjexaGo. All rights reserved.

Previous: [Chapter 1 — Introduction](#) | **Next:** [Chapter 3 — Registration & Plans](#)



CHAPTER 03

Chapter 3 — Registration & Plan Selection

Creating Your ProjexaGo Account

Create your account

Start free — no payment required.

Full name

Business / organization name

Acme Coffee

Email address

Password

At least 8 characters

At least 8 characters

At least one number

Upper & lowercase letters

A symbol (!@#\$...)

☐ I have read and accept the [Terms of Service](#), [Privacy Policy](#) and the [Acceptable Use Policy](#).

The service is provided "as is" and "as available" and may be temporarily unavailable due to scheduled or emergency maintenance. A copy of these documents will be emailed to you.

Create account

Already have an account? [Sign in](#)

03 register form

Go to <https://projexago.com> and click **"Get started"** or **"Start free"** to reach the registration screen at ``https://app.projexago.com/register``.

Registration Form Fields

Field	Description	Required
Full name	Your first and last name	✓
Email address	Valid email (becomes your username)	✓
Password	Minimum 8 characters, letters and numbers	✓
Organization name	Your company or business name	✓

⚠ Important: *The email you enter becomes your permanent username. Use an address you will always have access to, ideally a business email.*

Legal Acceptance

Before completing registration you must accept:

- **Terms & Conditions**
- **Privacy Policy**
- **Acceptable Use Policy**

A copy of the accepted terms is sent to your email for your records.

Plan Selection

After registration you are guided to plan selection:

Option A: Free Trial (recommended) Explore the full platform for 14 days, no payment required.

- 1 store, 50 products, 0.5 GB storage, 2 team members

Option B: Paid plan

Plan	Annual Price	Best for
Basic	\$149.00/yr	Single store, getting started
Pro	\$349.00/yr	Multiple stores with AI tools
Enterprise	\$899.00/yr	Large teams, unlimited scale

Paid Plan Activation Flow

1. Select plan → charge created (pending)
2. Receive payment instructions by email
3. Make payment outside the system
4. Upload payment proof
5. ProjexaGo team reviews: received → in validation → approved
6. Account activated → access unlocked

 **Important:** While pending activation you cannot create portals. You can view your activation status from the platform.

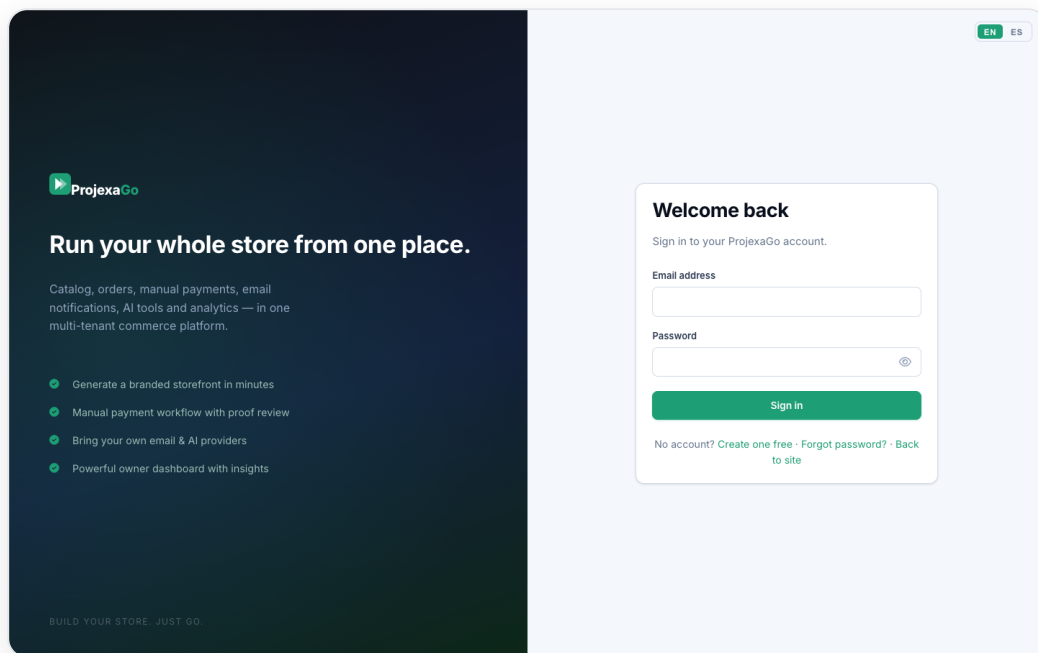
Password Recovery

1. Go to the login page → "Forgot your password?"
2. Enter your registered email
3. Follow the recovery link in your inbox
4. Set a new password

Previous: [Chapter 2 — Landing Page](#) | **Next:** [Chapter 4 — Login](#) →

CHAPTER 04

Chapter 4 — Login & Account Management

*04 login screen*

Logging In

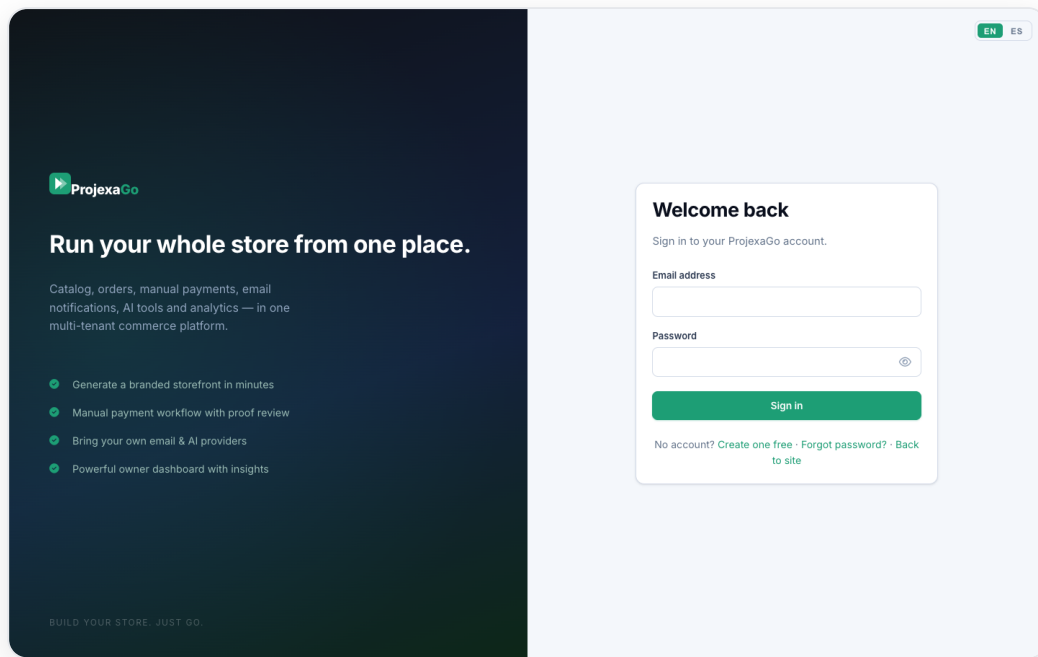
1. Go to <https://app.projexago.com/login>
2. Enter your **email** and **password**
3. Click "**Log in**"

First Login (invited team members)

Invited members receive a temporary password by email. On first login:

1. Use the temporary password
2. System immediately prompts you to **change your password**
3. Set a new password (minimum 8 characters)
4. You cannot proceed until this step is completed

Pending Activation Screen



04 activation pending

If your paid plan is awaiting verification, you'll see an activation screen showing:

- Current activation status (step progress)
- Payment status (received / in validation / approved)
- Option to upload or update your payment proof
- Button to resend payment instructions to your email

User Roles

Role	Access
Portal Owner	Full access: settings, billing, team, all operational modules
Portal Admin	Team and settings management (not billing)
Portal Staff	Orders, customers, catalog — no settings or billing

Account Actions

Change password (while logged in): Click your name/avatar (top right) → "Change password" → Enter current password → Set new password → Save

Log out: Click your name/avatar → "Log out"

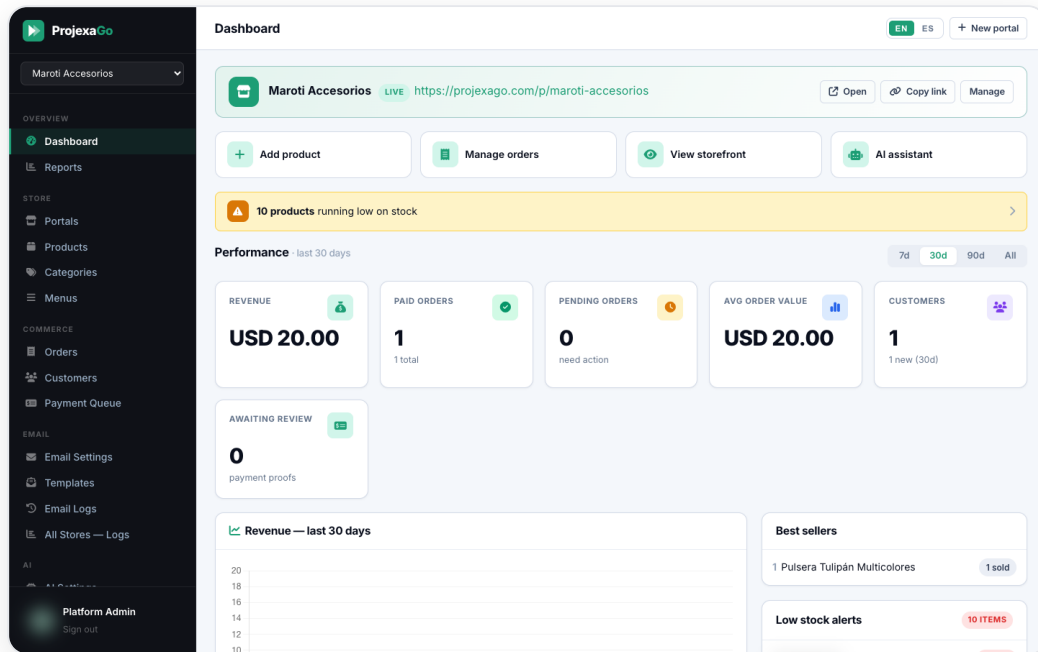
Security Practices

- Use a unique password for ProjexaGo
- Log out on shared devices
- Review the audit log periodically (Admins and Owners)
- Never share credentials — invite team members properly via the Team module

Previous: [Chapter 3 — Registration](#) | **Next:** [Chapter 5 — Dashboard](#) →

CHAPTER 05

Chapter 5 — Main Dashboard

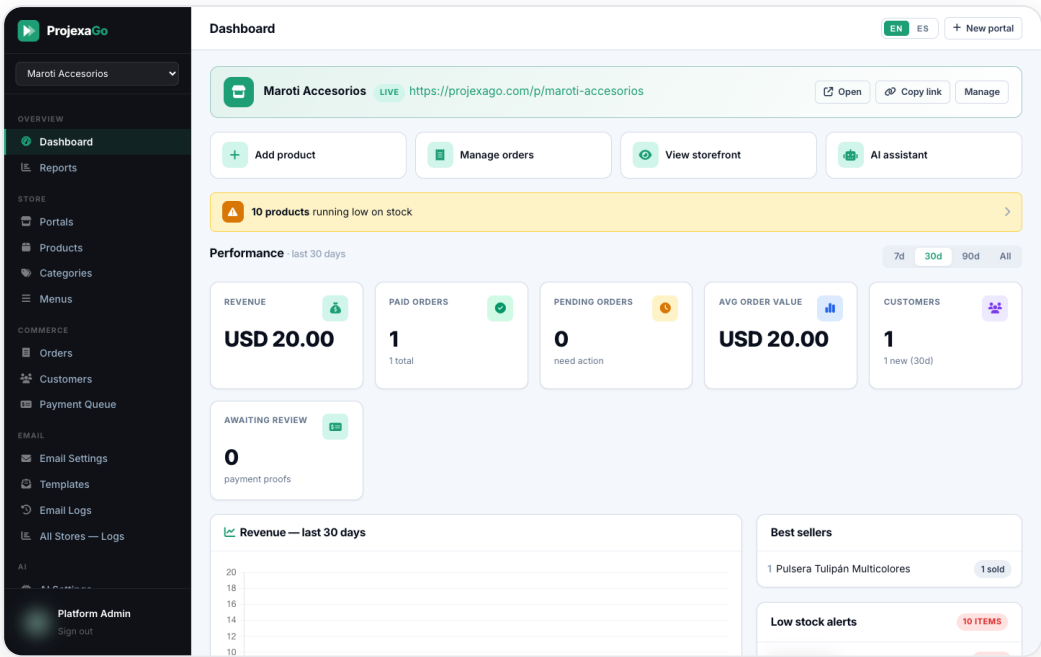
*05 dashboard full*

Overview

The **Dashboard** is the platform home screen. It shows a consolidated view of your entire business activity in real time.

Access: **Side menu** → **Dashboard** (or automatically on login)

Key Metrics (KPIs)



05 dashboard kpis

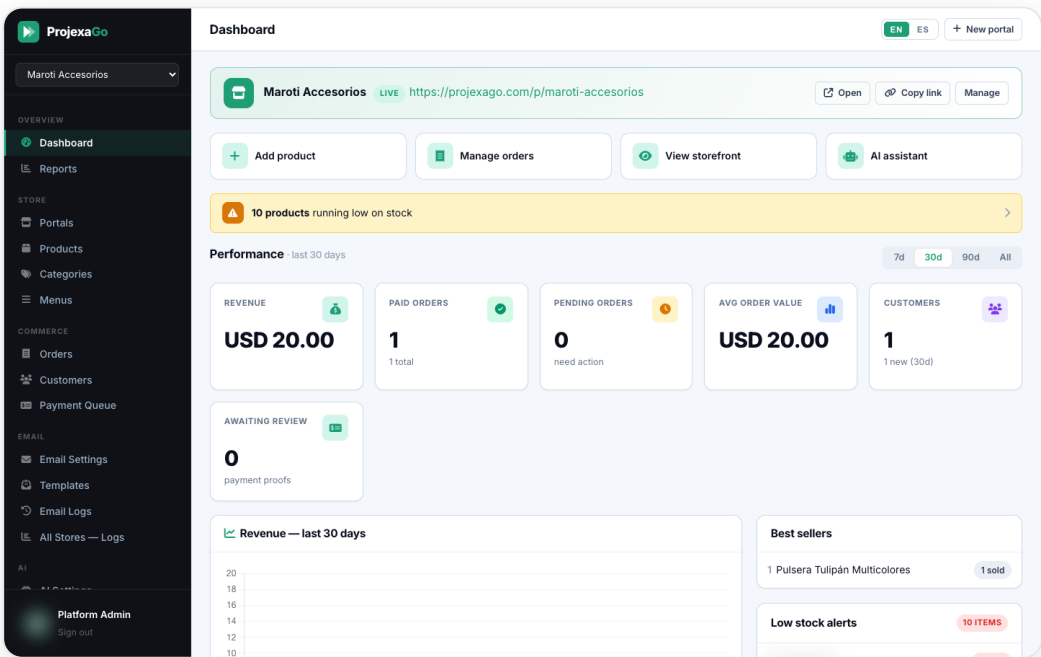
KPI	Description	----- -----	**Total orders**	All orders in the selected period
	Paid orders	Orders with approved payment		
	Pending orders	Orders awaiting payment or confirmation		**Rejected orders**
	Orders with rejected payment or cancelled		**Revenue**	Sum of all approved-payment orders
	Average order value	Revenue ÷ paid orders		

 **Tip:** Default period is the last 30 days. Use the date range filter to change the window.

Dashboard Sections

Section	What it shows
Orders by status	Count and revenue amount per pipeline status
Revenue chart	30-day daily revenue line chart
Best sellers	Top 8 products by units sold
Low stock products	Top 10 products below threshold
Customer metrics	Total customers + new in last 30 days
Pending items	Payment reviews pending + open support cases
Recent orders	Last 8 orders with click-through to detail
Recent activity	Last 10 audit log entries
Email health	Sent/failed emails in last 30 days
AI usage	Token usage and estimated cost (Pro/Enterprise)
Setup checklist	Initial configuration steps remaining

Portal Switcher



05 dashboard portal selector

If you have multiple portals (Pro/Enterprise), use the portal selector in the top bar to switch between them. All dashboard data reflects the currently selected portal.

Management panel Navigation

Module	Description	Min. Role
 Dashboard	Business overview	All
 Portals	Store list and management	Owner, Admin
 Products	Catalog, variants, import	All
 Categories	Categories and nav menus	All
 Orders	Order pipeline	All
 Payments	Proof review queue	All
 Customers	Buyer CRM	All
 Team	Invite and manage members	Owner, Admin
 Billing	Subscription and charges	Owner
 Settings	Portal config and branding	Owner, Admin
 Domains	Custom domains and SSL	Owner, Admin
 Email	Provider and templates	Owner, Admin
 AI	AI configuration	Owner, Admin
 Reports	Sales, tax, inventory reports	All
 Support	Customer help cases	All

Previous: [Chapter 4 — Login](#) | Next: [Chapter 6 — Portal Wizard](#) →

CHAPTER 06

Chapter 6 — Portal Creation Wizard

The screenshot displays the 'New Platform' wizard in ProjexaGo. The sidebar on the left contains a 'Platform Admin' section with a 'Sign out' button. The main area is titled 'New Platform' and has a 'Business' tab selected. The 'Business Information' section includes fields for 'Legal name of your company' (Maroti Accesorios), 'Public brand name' (Maroti Accesorios), 'Tagline' (Your platform for everything), 'Description' (Tell customers what you do and why you're the best choice.), 'Industry' (Select...), 'Phone' (Optional), and 'Website' (https://example.com). The 'Required' fields are highlighted in red, and the 'Recommended' fields are highlighted in green.

06 wizard start

What is the Portal Wizard?

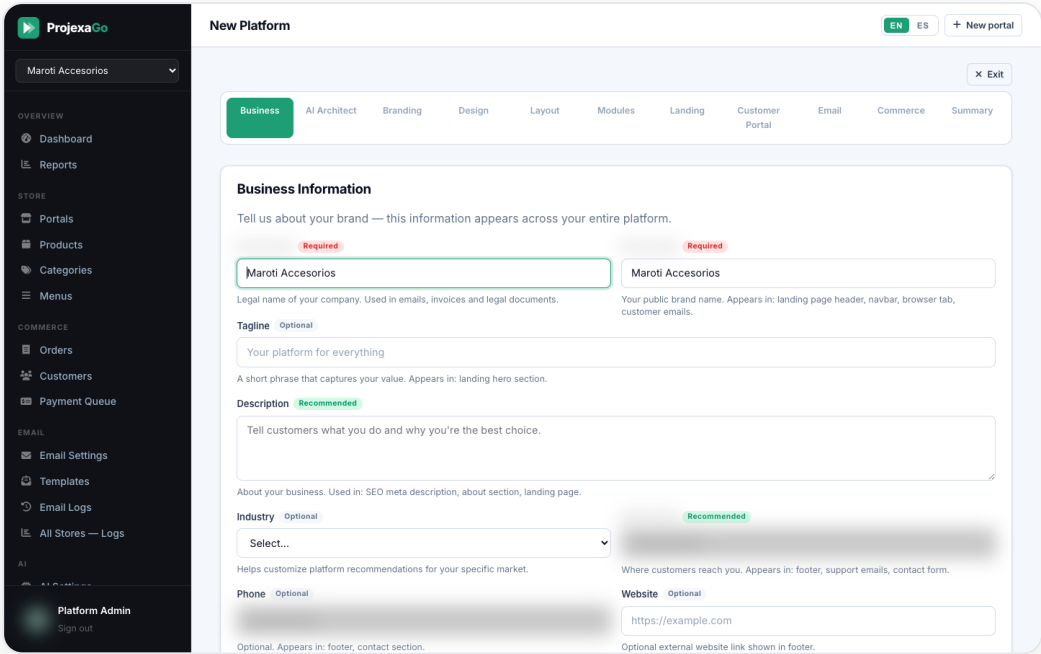
The **Portal Creation Wizard** is ProjexaGo's guided tool that walks you step by step through the complete configuration of your store. When finished, your public portal and management panel are ready to operate.

The wizard launches automatically when:

- You just created your account (first portal)
- You click **"Create new portal"** from the Portals section

⚠ Important: Your progress is saved automatically as a draft if you close the browser. You can resume from the dashboard or the Portals section.

Live Preview



06 wizard preview

The wizard features a **real-time live preview**: as you configure each section, you see exactly how your public portal will look. The screen is split: - **Left panel:** Configuration fields - **Right panel:** Live store preview

Wizard Steps

Step 1 — Project Type

Select the business type that best describes your operation:

Type	Description
E-commerce	Physical product sales with catalog and cart
Services	Service or digital product sales
Marketplace	Multi-vendor portal or community
SaaS / Software	Digital products or software subscriptions

Step 2 — Branding

Configure your brand identity:

- **Logo** (PNG/SVG, transparent background, 400×120px min)
- **Dark background logo** (optional, for dark headers)
- **Primary color** (buttons, accents) — HEX format (e.g. `#10B981`)
- **Secondary color** (complementary elements)
- **Typography** (Inter, Roboto, Poppins, Montserrat, and more)

Step 3 — Business Information

Field	Example
Portal name	"Aurora Café"
Tagline	"Best coffee in town"
Full description	"We are a specialty coffee shop..."
Contact email	hello@auroracafe.com
Phone	+1 555 0100
WhatsApp	+1 555 0100
Address	123 Main Street
Social links	instagram.com/auroracafe

Step 4 — Design & Layout

- **Hero image** (1920×1080px recommended, JPG/PNG/WebP)
- **Landing page sections** (enable/disable: hero, features, featured products, about, CTA)
- **Product listing style** (grid or list)

Step 5 — Categories

Build your catalog structure:

1. Click **" + Add category "**
2. Enter name and optional image
3. Add subcategories if needed

4. Drag to reorder

 **Tip:** You can add and reorganize categories anytime from the *Categories module*.

Step 6 — Initial Products

Add products in three ways:

- **Manually:** Fill in the product form one by one
- **Bulk import (CSV/XLSX):** Download the template, fill it, upload it
- **AI-assisted import:** Upload any tabular file; AI maps the fields automatically

 **Note:** This step is optional. You can skip it and add products from the *Products module* later.

Step 7 — Payment Methods

Configure how you receive payments. For each method:

1. Click "+ Add payment method"
2. Select type: bank transfer / digital wallet / cash / other
3. Name it (e.g. "Bank Transfer — Chase")
4. Write detailed payment instructions (account number, routing, holder name, etc.)

 **Important:** Payment instructions are sent automatically to customers by email. Make them clear and complete.

Step 8 — Policies & Legal

Configure your store policies:

- Terms and conditions
- Privacy policy
- Return policy
- About us

ProjexaGo includes model texts for each policy that you can customize.

Step 9 — Regional Settings

Field	Options
Portal language	Spanish, English
Currency	USD, MXN, PEN, COP, EUR, and more
Main country	Full country list
Tax included in prices	Yes / No
Tax rate	Custom %

Step 10 — Invoicing Configuration

Field	Description
Legal name	Your company's legal name
Tax ID	RUC / EIN / VAT number
Invoice prefix	e.g., "INV-" → INV-0001
Credit note prefix	e.g., "CN-"
Invoice footer	Legal or informational text

Step 11 — Shipping & Delivery (optional)

1. Set your operation country
2. Add delivery zones (by city, region or distance range)
3. For each zone: name, shipping cost, estimated delivery time

 **Tip:** Add a zone with \$0 cost named "In-store pickup" if you offer it.

Step 12 — Publish Your Portal

Your store will be available at: `https://[your-store-slug].projexago.com`

Options:

- **Publish now:** Store is immediately visible to the public
 - **Save as draft:** Store is saved but not publicly visible
-

Resuming a Saved Wizard

If you closed the wizard before completing it:

1. Go to the platform main screen
 2. Look for the "**Continue setting up your portal**" banner
 3. Or go to **Portals** → click the portal with "Draft" status
 4. The wizard resumes from where you left off
-

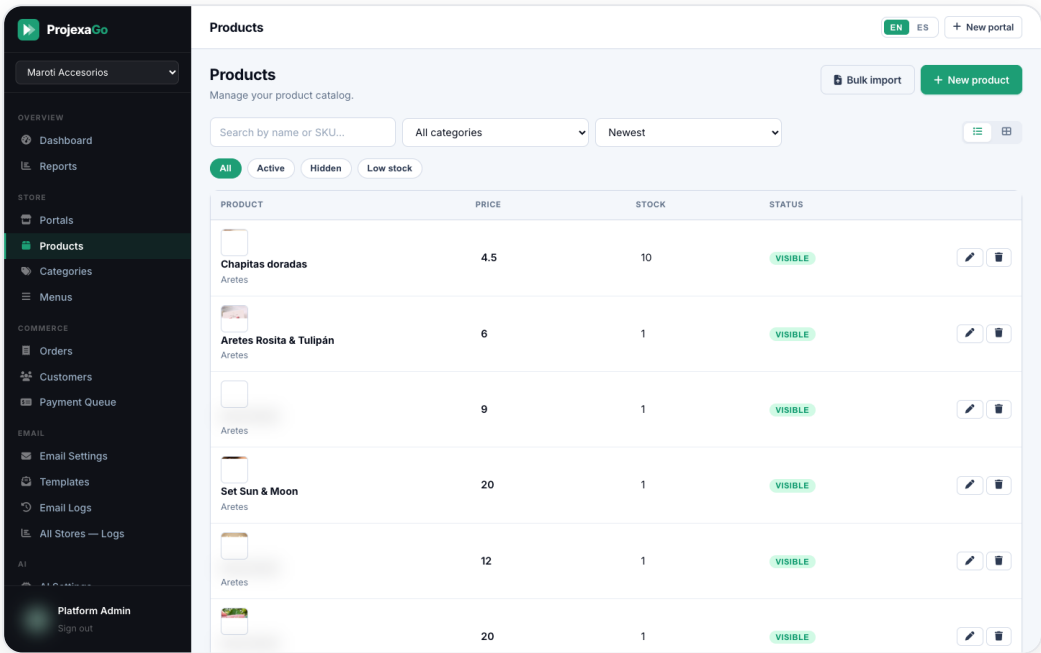
After the Wizard: Next Steps

1. **Add more products** (Chapter 7)
2. **Complete your category catalog** (Chapter 8)
3. **Configure email** for automatic notifications (Chapter 16)
4. **Add your custom domain** (Chapter 15)
5. **Invite your team** (Chapter 12)
6. **Activate AI tools** if on Pro/Enterprise (Chapter 17)

Previous: [Chapter 5 — Dashboard](#) | **Next:** [Chapter 7 — Products](#) →

CHAPTER 07

Chapter 7 — Products & Catalog Management



07 products list

Overview

The **Products** module is where you manage your entire commercial catalog.
Access via: **Side menu → Products**

Product List

The main table shows: image thumbnail, name, SKU, category, price, stock, status (active/inactive) and actions.

Filters: Category, Status, Low stock, Search (name/SKU)

Quick edit: Price, stock and status directly from the list

Creating a New Product

Click "+ New product" or "Add product".

Basic Information

Field	Required
Name	
SKU (reference code)	
Brand	
Category	
Status (active/inactive)	
Featured / New flags	

Pricing

Field	Description
Price	Public selling price
Compare-at price	"Crossed out" original price (shows discount)
Sale label	Custom text (e.g. "Sale!", "2-for-1", "-30%")
Tax rate	Assigned tax rate

Descriptions

- **Short description** — Shown in catalog list views
- **Full description** — Detailed rich text on the product page
- **SEO description** — Meta description for search engines
- **Tags** — Search keywords (comma-separated)

 **AI Tip:** On Pro/Enterprise, click "**Generate with AI**" next to description, SEO or tags to auto-generate content based on the product name and category.

Inventory

Field	Description
Track stock	Enable/disable inventory tracking
Quantity in stock	Available units
Low stock threshold	Alert threshold for dashboard warning

 **Important:** If "Track stock" is on and stock reaches 0, the product shows as "Out of stock" and customers cannot add it to their cart.

Physical Details

- Weight and unit (kg, g, lb, oz)

Product Photos

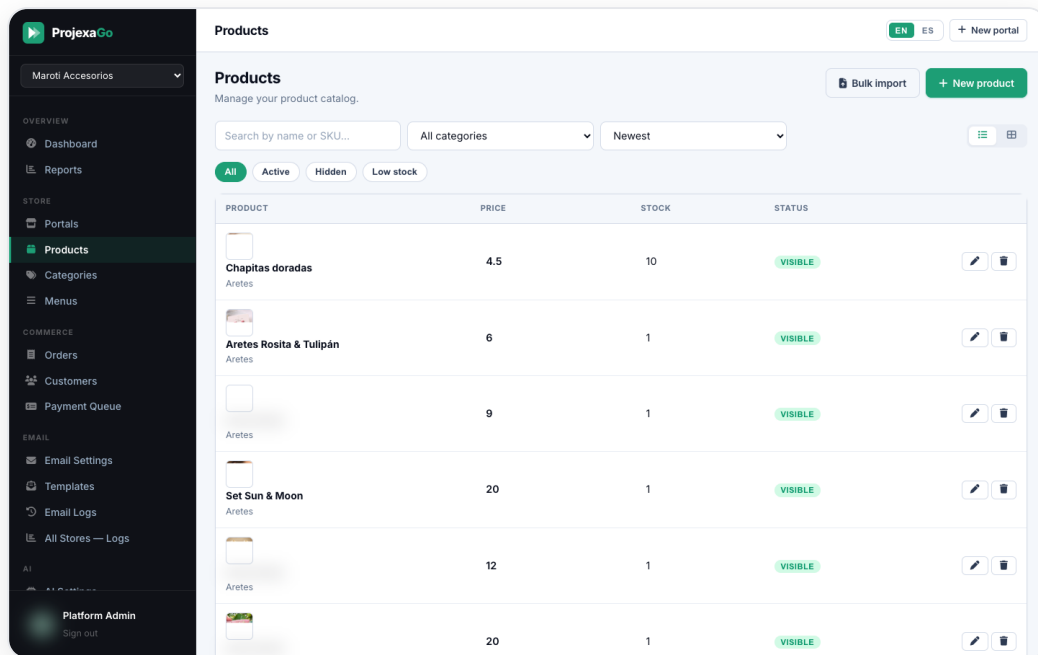
Upload up to **4 photos** per product. First photo = main display image.

Upload: Click the photo area or drag images (JPG, PNG, WebP)

Reorder: Drag photos to reorder (first = primary)

Recommended size: 1200×1200px or larger

Product Variants

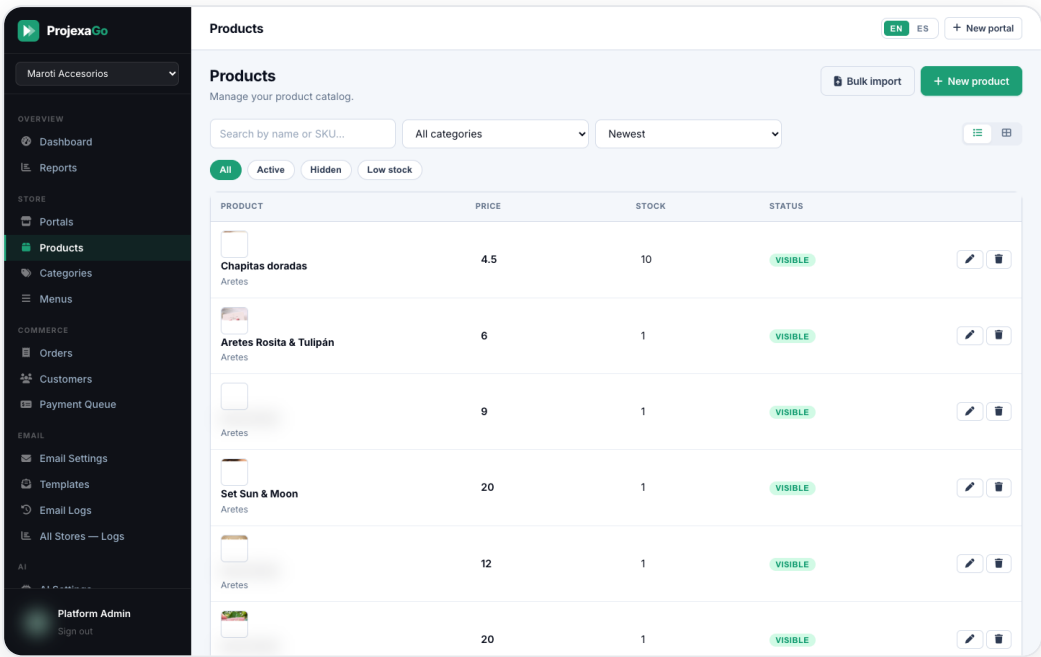


07 product variants

For products with multiple versions (size, color, presentation):

1. In "Variants" section, click **" + Add variant "**
2. Set the variant type (e.g. "Size", "Color", "Presentation")
3. For each variant option:
 - Name (e.g. "Size S", "Red", "250ml")
 - SKU (optional)
 - Price (can differ from base price)
 - Stock quantity

Bulk Product Import



07 bulk import

Standard Template (CSV/XLSX) 1. Click **"Import products"** → **"Download template"** 2. Fill in your product data (one row per product) 3. Upload the completed file 4. Review the validation preview 5. Confirm import
File size limit: 25 MB

Template columns: name | sku | brand | category | price | compare_price | sale_label | description | short_description | seo_description | tags | stock | low_stock_threshold | track_stock | weight | weight_unit | featured | new | active | tax_rate_id

AI-Assisted Import

Upload any tabular file (non-standard format):

1. Upload the file
2. AI analyzes columns and suggests field mapping
3. Review and adjust the mapping
4. Confirm import

Best Practices

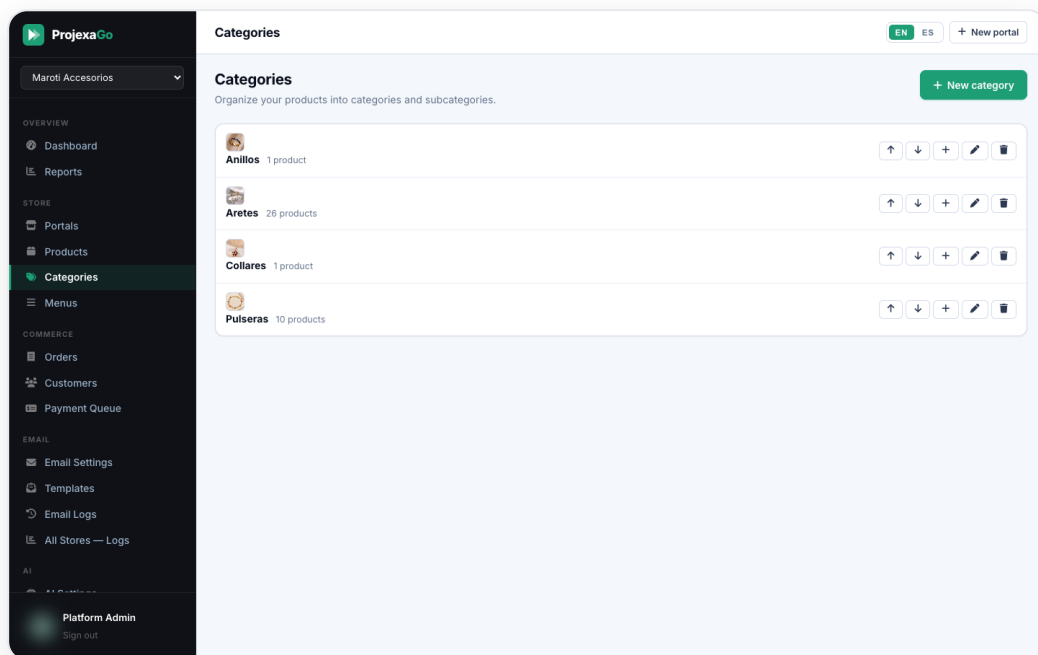
1. **Descriptive names** — Include brand, model, key variant (e.g. "Single-Origin Coffee Beans 250g — Medium Roast")
2. **Quality photos** — Clean, professional photos on neutral backgrounds
3. **Consistent SKUs** — Define a coding system from the start (e.g. CAT-VARIANT-NUM)
4. **Update stock regularly** — After every offline sale or stock receipt
5. **Use tags** — Add synonyms and related terms to improve search
6. **Leverage AI** — Use AI to generate SEO-optimized descriptions; only needs name and category

Previous: [Chapter 6 — Wizard](#) | **Next:** [Chapter 8 — Categories & Menus](#) →

CHAPTER 08

Chapter 8 — Categories & Navigation Menus

Product Categories



08 categories list

****Categories**** organize your catalog and let customers browse efficiently.

Access: ****Side menu → Categories****

Create a Category

1. Click **" + New category "**
2. Enter name, optional image, and parent category (for subcategories)
3. Set status (active/inactive) → Save

Hierarchy

ProjexaGo supports two levels:

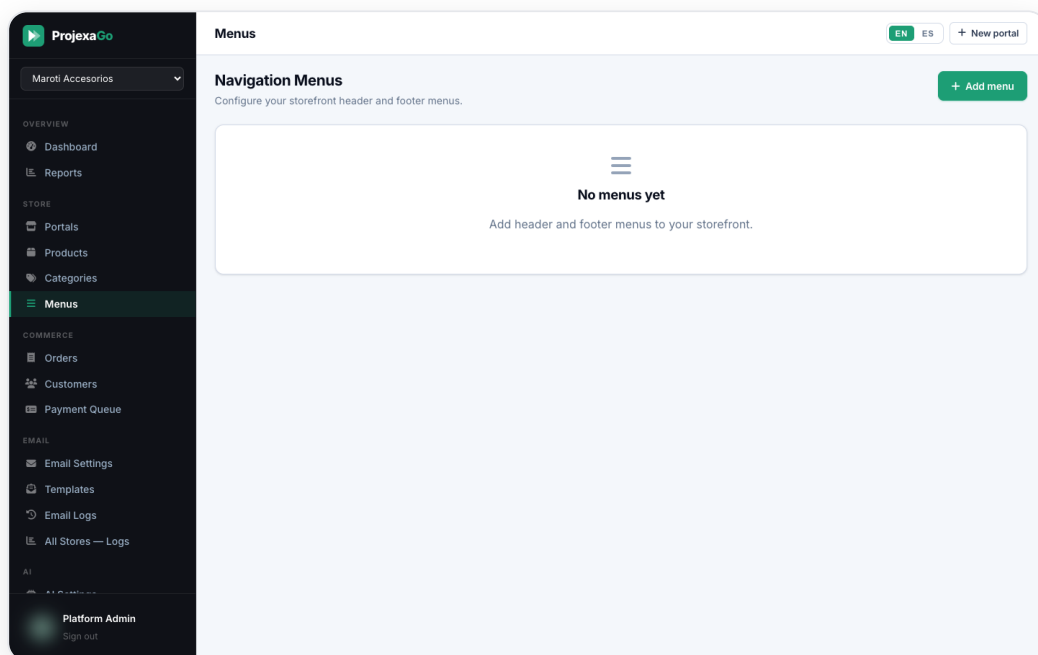
- **Main category** (e.g. "Clothing")
 - **Subcategory** (e.g. "T-Shirts", "Pants", "Jackets")

Reorder

Drag rows in the list to change the display order in your store.

⚠ Important: Deleting a category does NOT delete its products — they become uncategorized. Reassign products before deleting a category.

Navigation Menus



08 menus

****Menus**** define the navigation structure visible in your storefront's top navbar. They are independent from categories but typically link to them.

Create a Menu

1. Go to **Categories** → **Menus** → **" + New menu "**
2. Name the menu (e.g. "Main Menu")
3. Add items

Menu Item Fields

Field	Description
Label	Text shown in the menu
Link type	Category / Custom URL / Internal page
Destination	Category, URL or page to link to
Order	Position in the menu
Child items	Dropdown sub-items

Dropdown Menus

You can create multi-level dropdown menus:

```
Main menu:
  Coffee →
    └─ Whole Bean
    └─ Ground
    └─ Capsules
  Accessories
  About Us
```

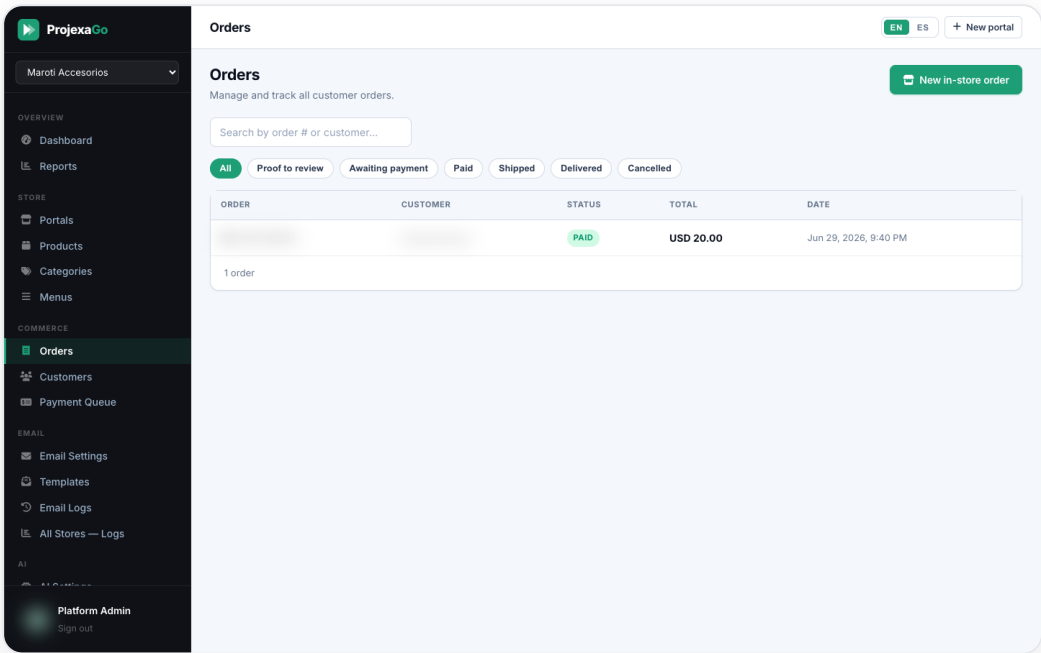
Best Practices

1. **5–8 main categories** is easier to navigate than 20 scattered ones
2. **Customer-friendly names** — use terms your customers naturally search for
3. **Category images** — visual categories make the store more professional
4. **Menu-category coherence** — ensure menu items link to categories with active products
5. **Test on mobile** — the menu collapses to a hamburger on small screens

Previous: [Chapter 7 — Products](#) | Next: [Chapter 9 — Order Management](#) →

CHAPTER 09

Chapter 9 — Order Management



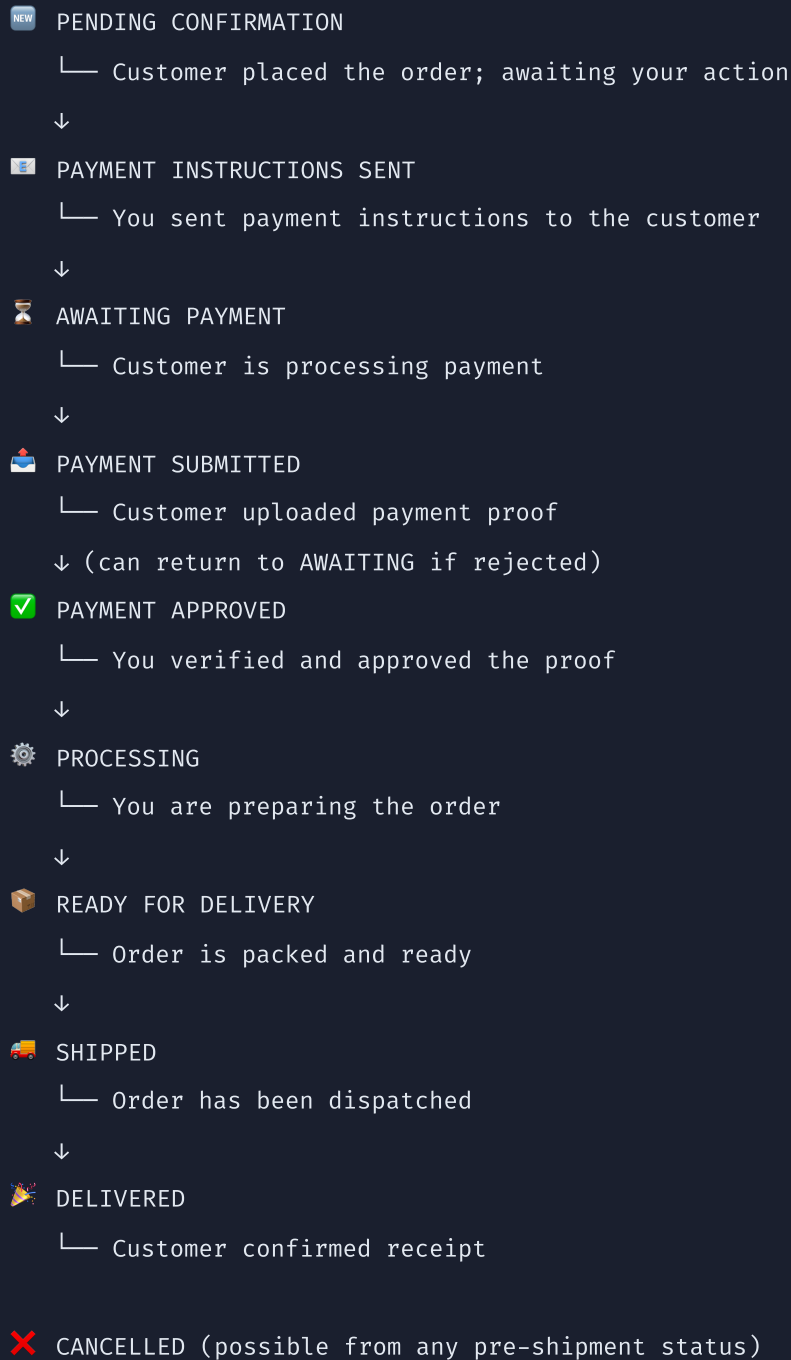
09 orders list

Overview

The **Orders** module is the operational center of your business in ProjexaGo.

Access: **Side menu → Orders**

Order Status Flow



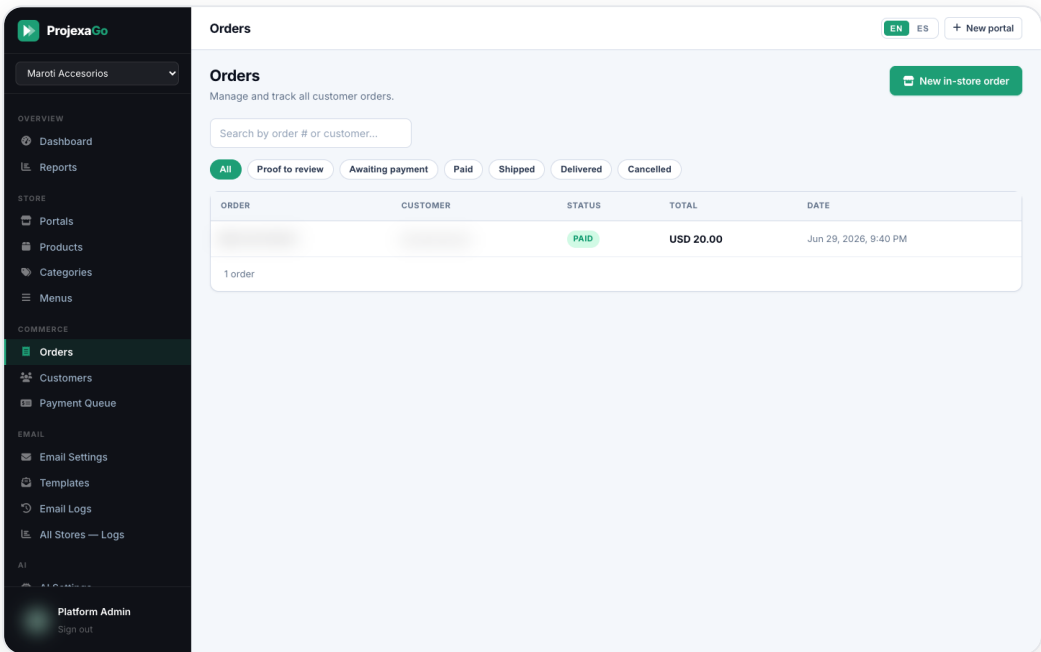
Note: Status cannot be skipped — you must advance in order. Cancellation is possible before "Shipped" status.

Order List

Columns: Order number, customer, channel, total, order status, payment status, date

Filters: Status, Payment status, Customer (name/email), Date range, Search (order number)

Order Detail



09 order detail

Clicking an order shows: - Order information (number, date, channel, notes) - Products table (name, variant, qty, unit price, subtotal) - Totals (subtotal, discount, tax, shipping, **order total**) - Customer information (name, email, phone, shipping/billing address) - Status history log (each transition with user and timestamp) - Payment proof (if uploaded by customer)

Advancing Order Status

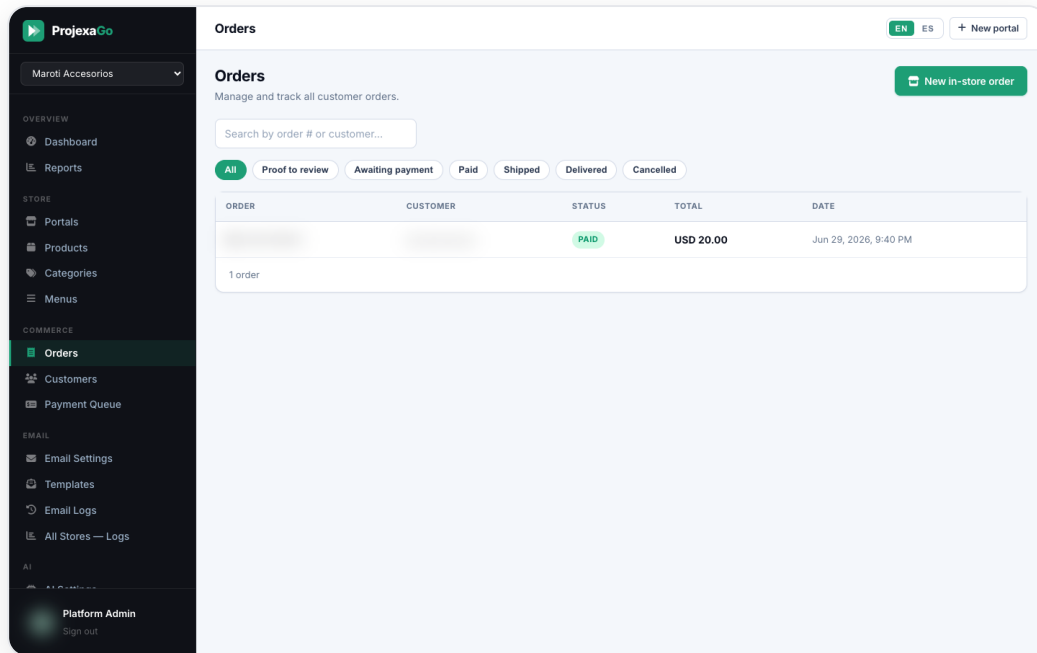
The primary action button changes based on current status:

Current status	Available action
Pending confirmation	"Send payment instructions"
Instructions sent	"Mark as awaiting payment"
Awaiting payment	(waiting for customer to upload proof)
Payment submitted	"Review proof" → Approve / Reject
Payment approved	"Mark as processing"
Processing	"Mark ready for delivery"
Ready for delivery	"Mark as shipped"
Shipped	"Mark as delivered"

Sending Payment Instructions

1. Click "**Send payment instructions**"
 2. Select which payment method(s) to include
 3. Optionally add a custom message
 4. Click "**Send**" — customer receives email with instructions and tracking link
-

Creating a Manual Sale (In-Store)



09 new manual sale

For in-person or phone sales: 1. Click ****"+ New order"** or ****"New sale"** 2. Search/select existing customer or create new 3. Add products (search by name or SKU), set quantity and optional price override 4. Add internal notes, select channel, payment method 5. Confirm the order
Manual orders enter the same status flow as online orders.

Cancelling an Order

1. Open the order detail
2. Click **"Cancel order"**
3. Select cancellation reason
4. Optionally send notification email to customer
5. Confirm

⚠ Important: Cannot cancel orders marked as "Shipped" or "Delivered". Use the Returns flow (Billing module) for those cases.

Automatic Customer Notifications

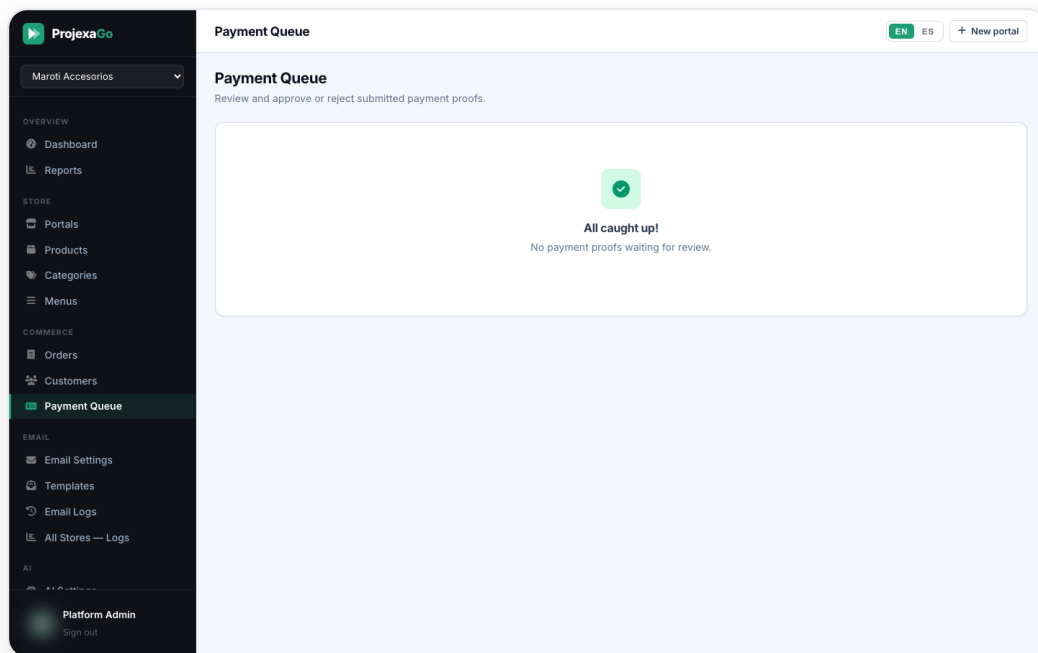
Event	Email sent
Order placed	Order confirmation with details
Instructions sent	Email with payment instructions
Payment approved	Payment received confirmation
Payment rejected	Notification with retry request
Processing	"Your order is being prepared"
Shipped	"Your order is on its way"
Delivered	Delivery confirmation

 **Tip:** Customize these emails in **Settings → Email → Templates** to match your brand.

Previous: [Chapter 8 — Categories](#) | **Next:** [Chapter 10 — Payment Queue →](#)

CHAPTER 10

Chapter 10 — Payment Queue & Proof Review



10 payment queue

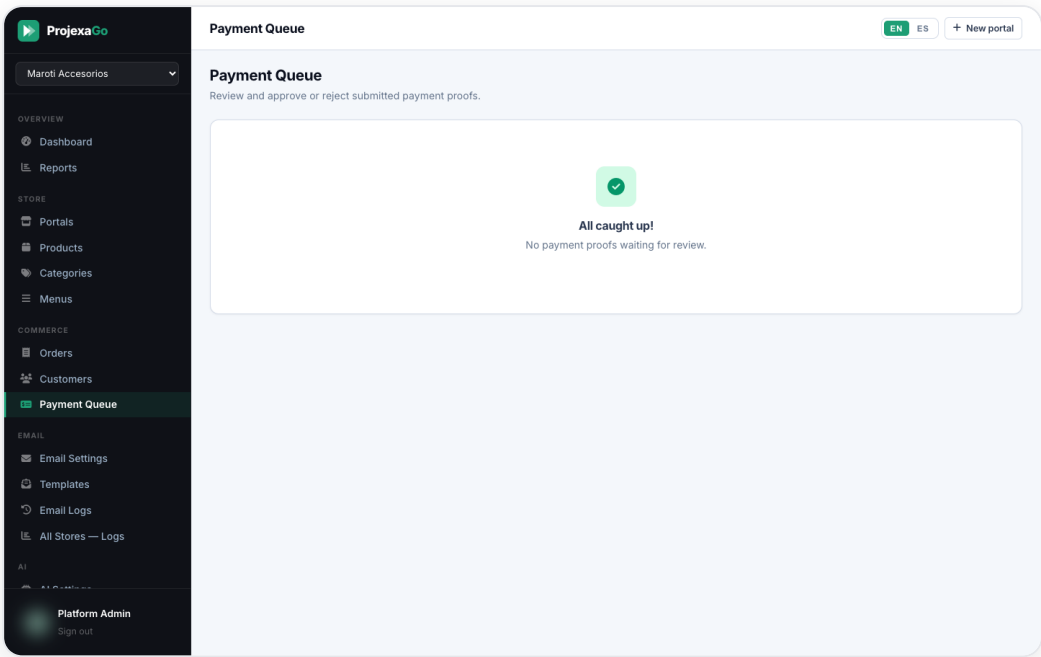
Overview

The **Payment Queue** is where you review and approve (or reject) payment proofs submitted by customers. Access: **Side menu → Payments**

Payment Flow

```
Customer places order → You send instructions →  
Customer pays outside system → Customer uploads proof →  
Order appears in your queue (status: "Payment Submitted") →  
You review → Approve or Reject →  
System updates status and notifies customer
```

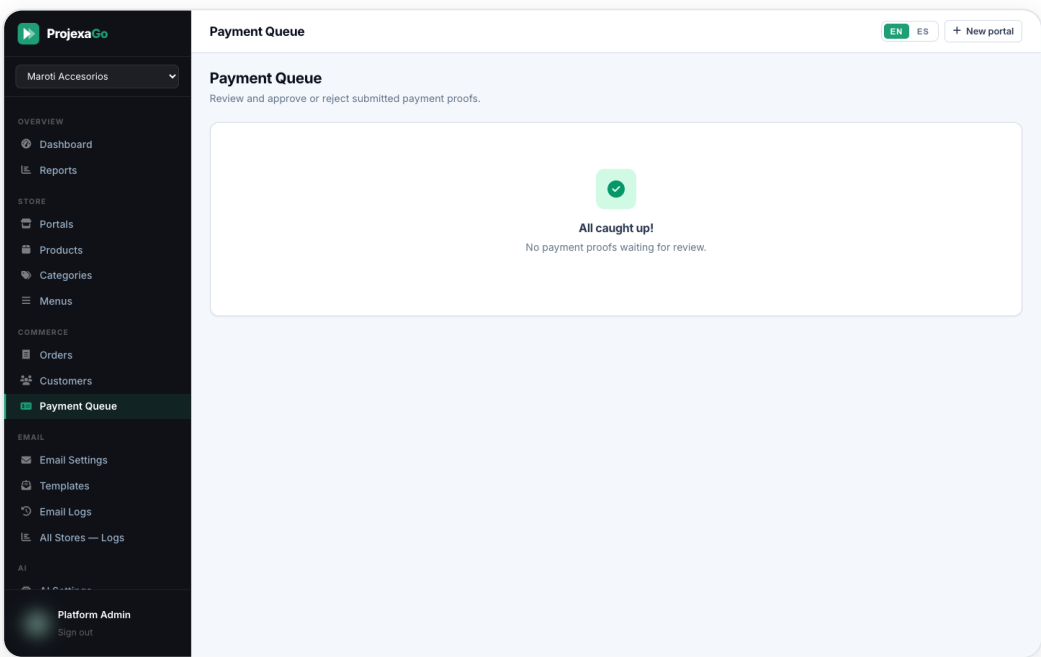
Pending Payments List



10 payment queue list

Column	Description			Order #	Order number	
Customer	Name and email		Amount	Order total	Proof	Thumbnail of uploaded proof
			Submitted	When the customer uploaded it		Queue time
						How long it's been waiting for review

Reviewing a Proof



10 payment review

1. Click a pending payment to open it 2. Review the order detail, full-size proof image/PDF, and payment instructions sent 3. Choose an action:

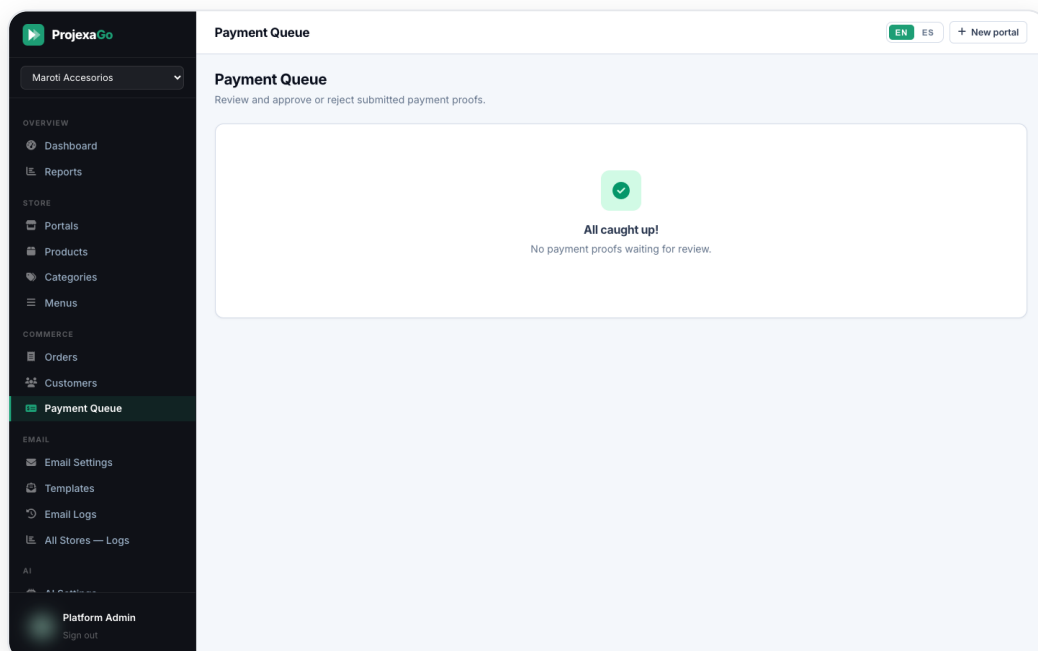
Approve:

- Click **"Approve payment"**
- Order advances to "Payment Approved"
- Customer receives confirmation email

Reject:

- Click **"Reject payment"**
- Enter rejection reason (sent to customer):
 - "Proof amount doesn't match order total"
 - "Proof is unreadable"
 - "Payment was sent to wrong account"
 - Or write a custom reason
- Order returns to "Awaiting Payment"
- Customer receives email with rejection reason and retry instructions

Managing Payment Methods



10 payment methods

Go to ****Payments → Payment methods**** to manage available payment options.

Add a Payment Method

1. Click "+ New payment method"
2. Enter name, type (bank transfer / digital wallet / cash / other)
3. Write complete payment instructions
4. Set status (active/inactive) → Save

Temporarily Disable a Method

If you cannot receive payments via a specific method, set it to "Inactive". Customers won't see it at checkout until reactivated.

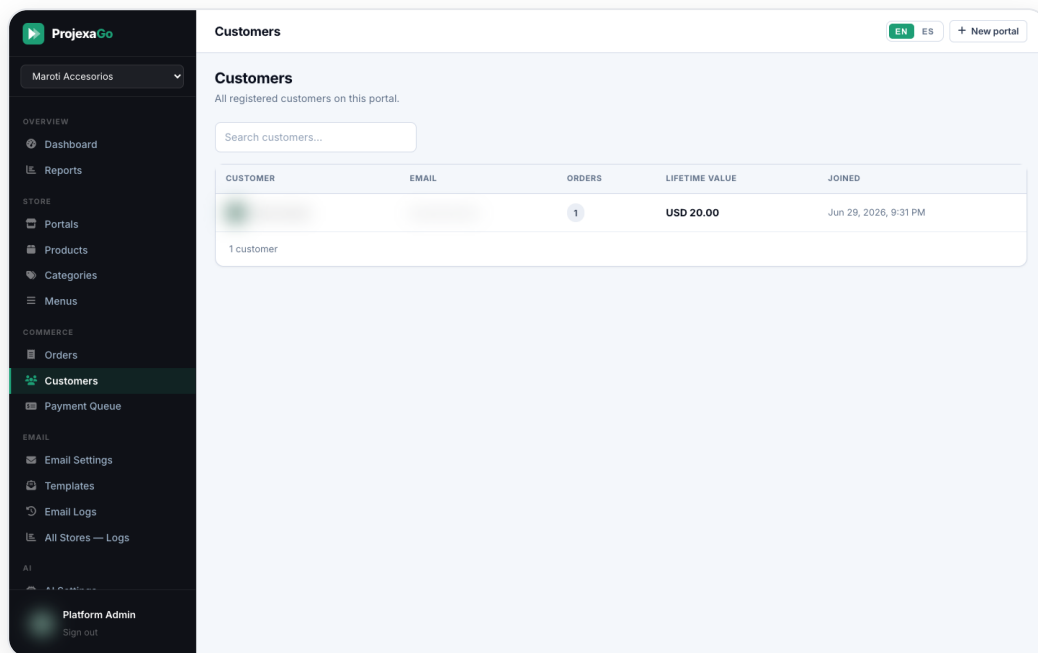
Best Practices

1. **Review the queue daily** — response time directly impacts customer satisfaction
2. **Be clear in rejection messages** — descriptive rejection messages reduce resubmissions
3. **Verify the exact amount** — decide your policy on minor rounding differences in advance
4. **Keep records** — if a proof looks manipulated, save a copy before rejecting

Previous: [Chapter 9 — Orders](#) | Next: [Chapter 11 — Customers](#) →

CHAPTER 11

Chapter 11 — Customer Management



11 customers list

Overview

The **Customers** module is ProjexaGo's CRM for your store's registered buyers.

Access: **Side menu → Customers**

 **Note:** Customers are different from team members. Customers register on your **public storefront** to shop. Team members are invited from the platform to manage the business.

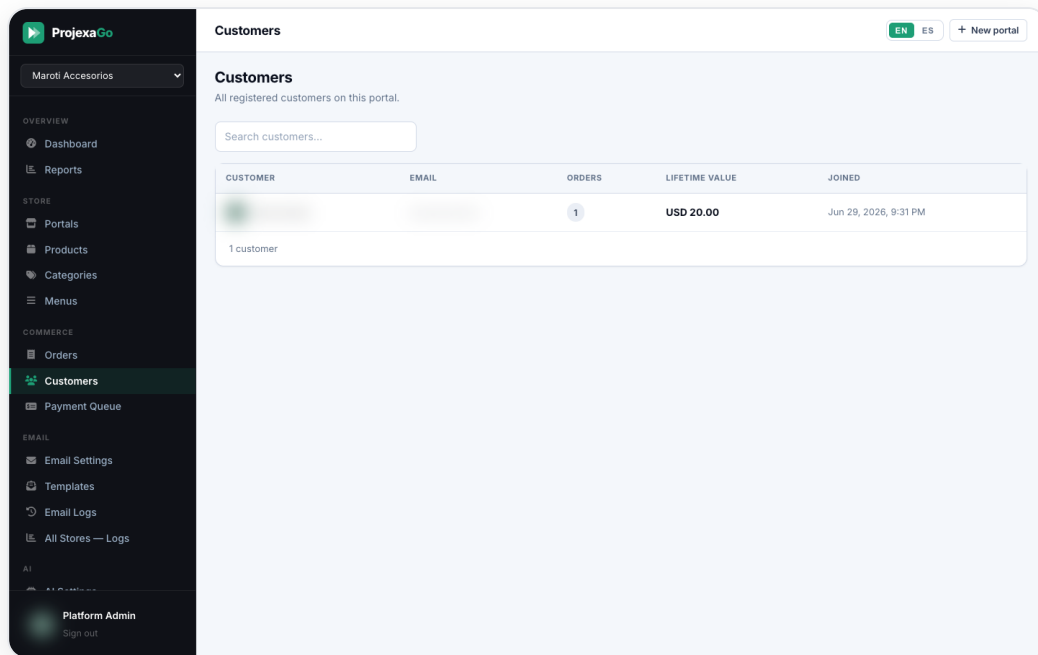
Customer List

Columns: Full name, email, phone, total orders, total spent, status, registration date

Search: By name, email or phone

Filter: Active / Inactive / All

Customer Profile



11 customer detail

Clicking a customer shows:

Personal information: Full name, email, phone, company, tax ID, national ID, birth date

Address: Primary shipping and billing address

Order history: All orders with status, amount and date

Support history: All support cases opened by this customer

Editing a Customer

Click **"Edit"** on their profile to update any field. Useful for correcting shipping addresses or tax information reported by the customer.

Activating / Deactivating

- Set status to **"Inactive"** to block login access
- The customer's order history and data are preserved
- Reactivate at any time

Customer Self-Service (Storefront)

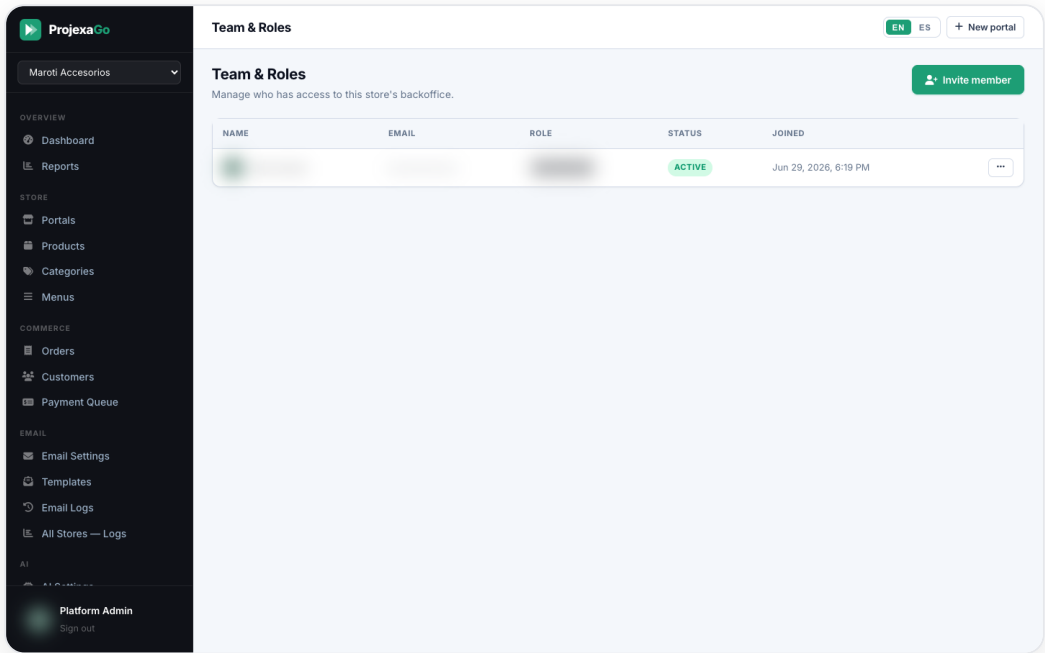
Customers manage their own experience from the public storefront:

Function	Description
Register / Login	Email and password authentication
Profile editing	Name, address, password change
Browse catalog	Search, filters, product pages
Checkout	Cart, payment method selection
Order tracking	Real-time status via unique token
Upload payment proof	From their tracking page
Download invoices	PDF download from their account
Support cases	Open and track cases from the store

Previous: [Chapter 10 — Payment Queue](#) | **Next:** [Chapter 12 — Team](#) →

CHAPTER 12

Chapter 12 — Team Management



12 team list

Overview

The **Team** module lets you invite others to help manage your store with role-based access. Access: **Side menu** → **Team** (Owner or Admin role required)

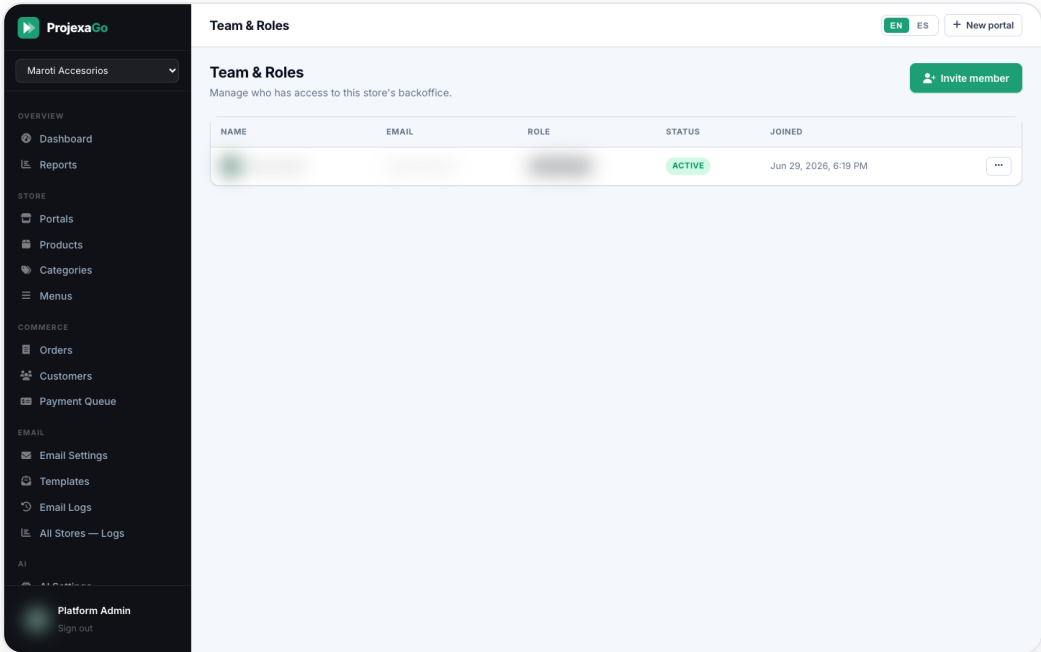
Roles

Role	Access
Portal Owner	Full access: settings, billing, team, all operational modules
Portal Admin	Team and settings (not billing)
Portal Staff	Orders, customers, catalog only — no settings or billing

Team List

Columns: Name, email, role, status, last login, invitation date

Inviting a Team Member



12 team invite

1. Click **" + Invite member"**

2. Enter email, full name, and role (Owner / Admin / Staff)

3. Click **"Send invitation"**
- The system creates the account and emails the new member with temporary credentials and login instructions.

 **Tip:** Assign **Staff** role to new hires and elevate permissions gradually. Follow the principle of least privilege.

Role Management

1. Open the member profile (or click their row in the table)

2. Select the new role

3. Save — takes effect on their next login

Activate / Deactivate Members

Set status to **"Inactive"** to suspend access without deleting the account. Set back to **"Active"** to restore.

 **Protection:** Cannot deactivate the last active Owner of a portal.

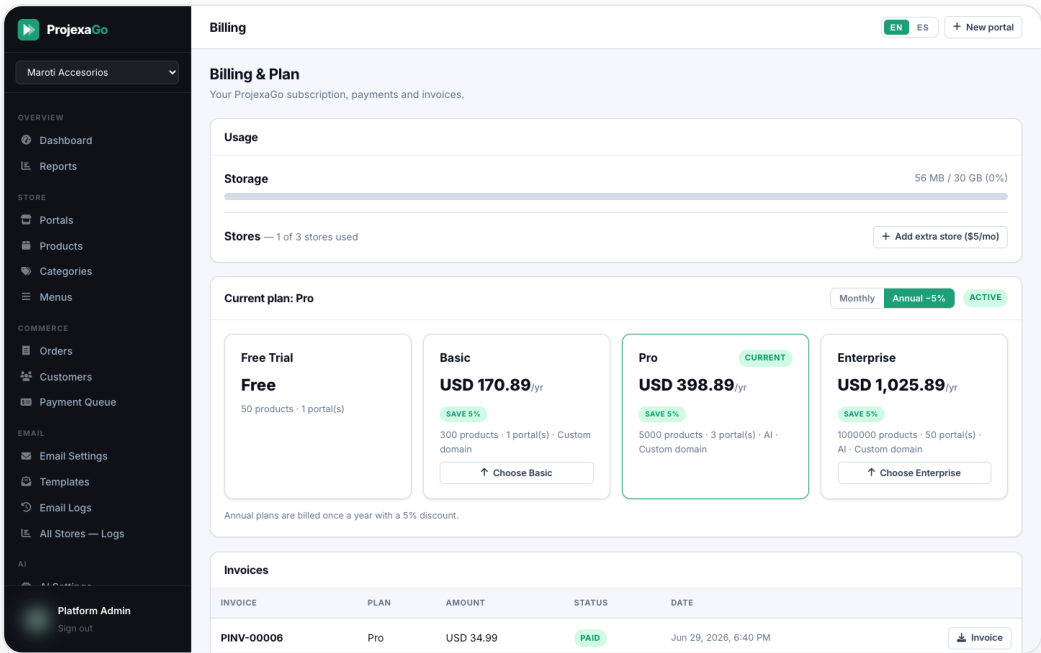
Team Member Limits by Plan

Plan	Max members
Free Trial	2
Basic	5
Pro	20
Enterprise	500

Previous: [Chapter 11 — Customers](#) | Next: [Chapter 13 — Billing](#) →

CHAPTER 13

Chapter 13 — Billing & Subscription



13 billing overview

Overview

The **Billing** module (Owner role only) manages your ProjexaGo subscription, charges, invoicing to your customers, and add-ons. Access: **Side menu → Billing**

Your Subscription

Billing EN ES + New portal

Billing & Plan
Your ProjexaGo subscription, payments and invoices.

Usage

Storage 56 MB / 30 GB (0%)

Stores — 1 of 3 stores used + Add extra store (\$5/mo)

Current plan: Pro Monthly Annual -5% ACTIVE

Free Trial
Free
50 products · 1 portal(s)

Basic
USD 170.89/yr
SAVE 5%
300 products · 1 portal(s) · Custom domain
↑ Choose Basic

Pro CURRENT
USD 398.89/yr
SAVE 5%
5000 products · 3 portal(s) · AI · Custom domain

Enterprise
USD 1,025.89/yr
SAVE 5%
1000000 products · 50 portal(s) · AI · Custom domain
↑ Choose Enterprise

Annual plans are billed once a year with a 5% discount.

Invoices

INVOICE	PLAN	AMOUNT	STATUS	DATE
PINV-00006	Pro	USD 34.99	PAID	Jun 29, 2026, 6:40 PM

Platform Admin Sign out Invoice

13 subscription detail

Shows: Active plan, status, period start/end, contracted price, stores used vs. max, storage used vs. max, active users vs. max.

Changing Plans

1. Click "Change plan"
2. Select the new plan
3. A proportional charge is generated — pay via email instructions

Charge History

Column	Description
Date	Charge date
Description	Type (subscription, add-on, overage)
Amount	Charge amount
Status	Pending / Paid / Overdue / Voided
Invoice	Download PDF

Paying a Pending Charge

1. Go to **Billing → Pending charge**
2. Click **"View payment instructions"** to receive details by email
3. Make payment outside the system
4. Click **"Upload proof"** → upload image or PDF
5. ProjexaGo team reviews and activates your account

Add-ons

Extra Stores (\$5.00/month recurring)

Go to **Billing → Add-ons → "Add extra store"** — available immediately.

Extra Storage (\$1.00/GB/month, billed in arrears)

- 20% tolerance buffer before blocking uploads
- Billed automatically based on usage
- Email alerts as you approach your limit

Customer Invoices

Billing EN ES + New portal

Billing & Plan
Your ProjexaGo subscription, payments and invoices.

Usage

Storage 56 MB / 30 GB (0%)

Stores — 1 of 3 stores used + Add extra store (\$5/mo)

Current plan: Pro Monthly Annual -5% ACTIVE

Free Trial
Free
50 products · 1 portal(s)

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USD 170.89_{/yr}
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USD 398.89_{/yr}
SAVE 5%
5000 products · 3 portal(s) · AI · Custom domain

Enterprise
USD 1,025.89_{/yr}
SAVE 5%
1000000 products · 50 portal(s) · AI · Custom domain
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Annual plans are billed once a year with a 5% discount.

Invoices

INVOICE	PLAN	AMOUNT	STATUS	DATE	
PINV-00006	Pro	USD 34.99	PAID	Jun 29, 2026, 6:40 PM	📄 Invoice

13 invoices

Issue an Invoice 1. Click **+** New invoice → select the linked order 2. Verify customer data and line items → **Issue invoice** 3. Available for PDF download and email sending

Void an Invoice

Open the invoice → **"Void"** → Confirm. Voided invoices remain in history marked as "Voided".

Credit Notes

For formal return documentation:

1. Go to **Billing** → **Credit notes** → **+** New credit note
2. Link to the original invoice, specify the credit amount
3. Issue — available as PDF and email to customer

Tax Rates

Billing EN ES + New portal

Billing & Plan
Your ProjexaGo subscription, payments and invoices.

Usage

Storage 56 MB / 30 GB (0%)

Stores — 1 of 3 stores used + Add extra store (\$5/mo)

Current plan: Pro Monthly Annual -5% ACTIVE

Free Trial
Free
50 products · 1 portal(s)

Basic
USD 170.89_{/yr}
SAVE 5%
300 products · 1 portal(s) · Custom domain
↑ Choose Basic

Pro **USD 398.89_{/yr}**
CURRENT
SAVE 5%
5000 products · 3 portal(s) · AI · Custom domain

Enterprise
USD 1,025.89_{/yr}
SAVE 5%
1000000 products · 50 portal(s) · AI · Custom domain
↑ Choose Enterprise

Annual plans are billed once a year with a 5% discount.

Invoices

INVOICE	PLAN	AMOUNT	STATUS	DATE
PINV-00006	Pro	USD 34.99	PAID	Jun 28, 2026, 6:40 PM

Invoice

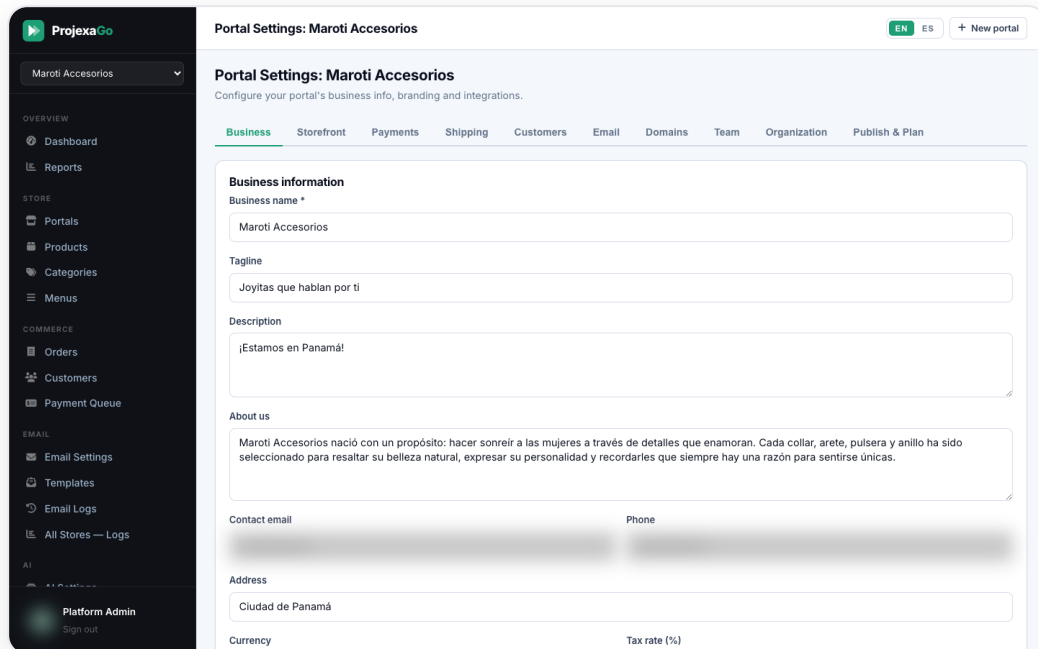
13 tax rates

1. Go to **Billing** → **Tax rates** → **+** New rate 2. Configure name (e.g. "VAT"), percentage (e.g. 20%), and whether it's included in prices 3. Assign rates to products from the Products module

Previous: [Chapter 12 — Team](#) | **Next:** [Chapter 14 — Settings](#) →

CHAPTER 14

Chapter 14 — Portal Settings



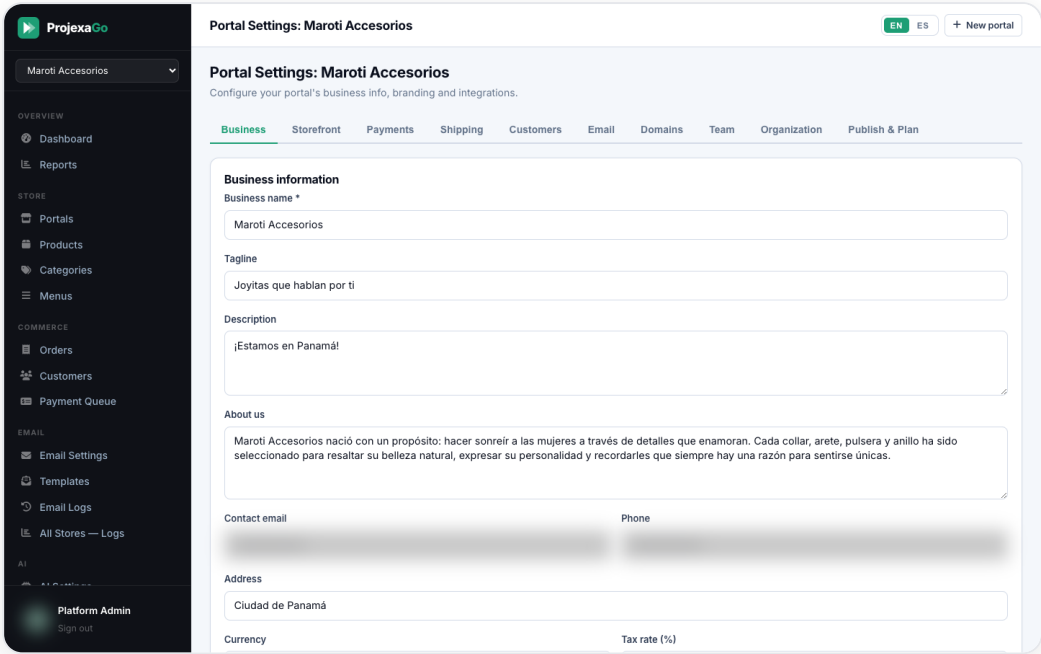
14 settings main

Overview

Settings contains all portal configuration grouped by area. Access: **Side menu**

→ **Settings** (Owner or Admin required)

Branding Settings



14 settings branding

| Field | Description | |-----|-----| | Primary logo | Navbar logo (PNG/SVG, transparent background) | | Dark logo | For use on dark backgrounds | | Primary color | Buttons, accents (HEX) | | Secondary color | Complementary elements (HEX) | | Typography | Main store font | | Hero image | Landing page banner |

Changes apply to your public store immediately.

Business Information

Name, tagline, full description, contact email, phone, WhatsApp, address, social media links.

Commerce Settings

Field	Options
Portal language	English / Spanish
Currency	USD, MXN, EUR, and 50+ more
Country	Full country list
Tax included in prices	Yes / No
Allow customer registration	Yes / No
Require login to purchase	Yes / No

Store Policies

Edit your store's legal policy texts:

- Terms and conditions
- Privacy policy
- Return policy
- About us

All displayed on dedicated pages accessible from the store footer.

Shipping Configuration

Delivery zones:

1. Click **" + New zone "**
2. Enter name, cost, estimated delivery time, description
3. Save

Customers see available zones during checkout.

Invoicing Configuration

Legal details for issuing invoices to customers:

- Legal company name, Tax ID, invoice prefix, credit note prefix, footer text

Landing Page Configuration

Change the project type (E-commerce / Services / Marketplace / SaaS) and which sections appear on your store's landing page.

Publish / Unpublish Portal

- **Publish:** Store is publicly visible
- **Unpublish (draft):** Store disappears from public URL; management panel continues working normally

⚠ Important: Unpublishing prevents customers from accessing the store or placing orders. Existing orders are not affected.

Audit Log

The screenshot shows the 'Portal Settings' page for 'Maroti Accesorios'. The interface includes a sidebar with navigation options like Overview, Dashboard, Reports, Store, Products, Categories, Menus, Commerce, Orders, Customers, Payment Queue, Email, Email Settings, Templates, Email Logs, All Stores, and Logs. The main content area is titled 'Portal Settings: Maroti Accesorios' and contains a 'Business information' section with fields for Business name, Tagline, Description, and About us. There are also fields for Contact email, Phone, Address, Currency, and Tax rate.

14 settings audit

****Settings → Audit Log**** — Full history of all actions in the system: - User who performed the action - Action type (create, update, approve, etc.) - Affected entity - Timestamp

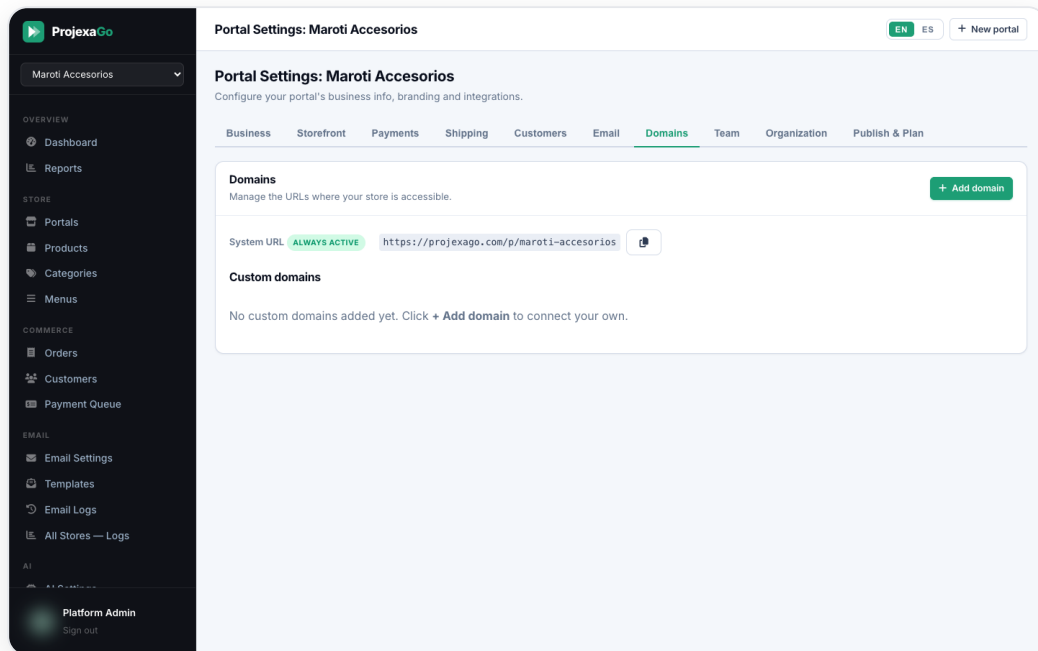
Filter by user, action type, date range.

Previous: [Chapter 13 — Billing](#) | **Next:** [Chapter 15 — Custom Domains](#) →



CHAPTER 15

Chapter 15 — Custom Domains



15 domains list

Overview

Custom domains (Basic, Pro and Enterprise plans) let you use your own web domain for your store instead of the ProjexaGo subdomain.

Example:

- Without: `my-store.projexago.com`
- With: `shop.mybusiness.com` or `www.mybusiness.com`

Access: **Side menu** → **Domains** (Owner or Admin)

Domain Lifecycle

1. PENDING DNS → Added; waiting for DNS configuration
2. DNS VERIFIED → TXT record confirmed; domain valid
3. PROVISIONING TLS → SSL certificate being generated automatically
4.  ACTIVE → Store live at your domain with HTTPS
-  FAILED (DNS/TLS error – retryable)

Adding a Custom Domain

Step 1: Add the domain in ProjexaGo

1. Go to **Domains** → **+ Add domain**
2. Type your domain (e.g. `shop.mybusiness.com` or `www.mybusiness.com`)
3. Click **"Add"** — system shows your specific DNS instructions

Step 2: Configure DNS at your registrar

For a subdomain (e.g. `shop.mybusiness.com`):

```
Type: CNAME
Name: shop
Value: cname.projexago.com
TTL: 3600 (or Auto)
```

For a root domain (e.g. `mybusiness.com`):

```
Type: A
Name: @ (or leave blank)
Value: [IP provided by ProjexaGo]
TTL: 3600

Type: TXT (verification)
Name: _projexago
Value: [verification code provided]
TTL: 3600
```

Configure these records in your domain registrar's DNS panel (GoDaddy, Namecheap, Cloudflare, etc.).

 **Note:** DNS changes can take from minutes to 48 hours to propagate globally. ProjexaGo checks automatically at regular intervals.

Step 3: Wait for verification and SSL

Once DNS propagates:

1. ProjexaGo verifies the domain automatically
2. Status changes to **"DNS verified"**
3. System auto-provisions the SSL certificate
4. When status reaches **"Active"** — your store is live at your domain with HTTPS

 **Tip:** You don't need to purchase or configure SSL certificates. ProjexaGo handles it completely.

Primary Domain

If you have multiple domains, one is the **primary domain** used for:

- Customer email links
- SEO canonical URL
- Official store address shown to customers

To change: Click the target domain → **"Set as primary"**

System URL (backup)

Your store always remains accessible at: `https://[your-slug].projexago.com`

This URL works as a permanent backup regardless of custom domain status.

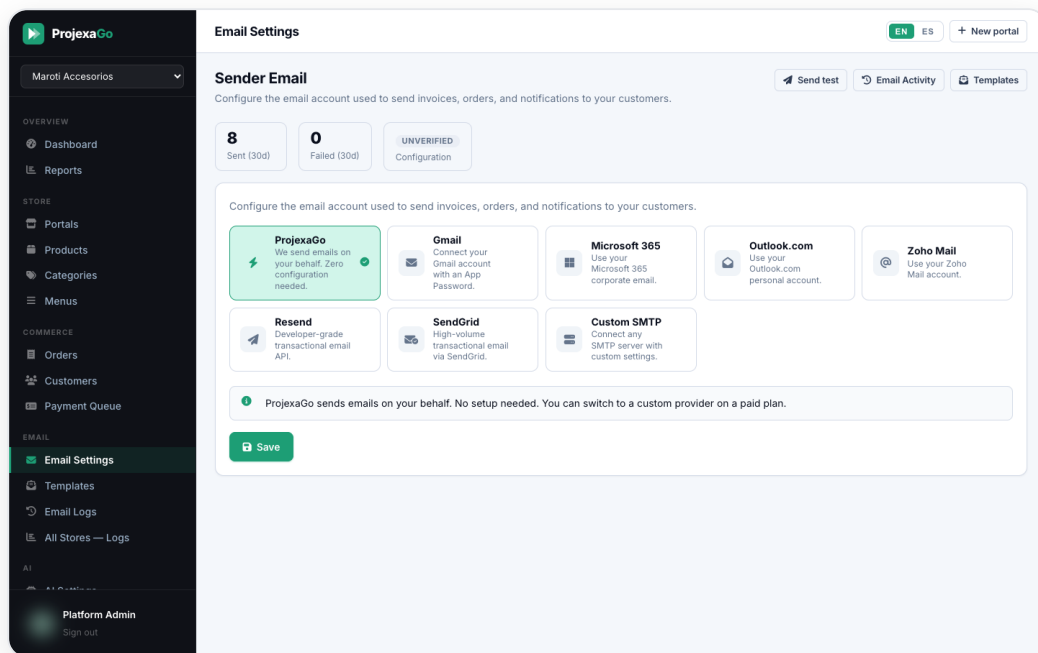
Troubleshooting

Problem	Solution
Still "Pending DNS" after 48h	Verify records were created correctly. Use dnschecker.org to check propagation.
Status shows "Failed"	Click "Retry verification". If persistent, re-check DNS records.
Domain shows "Not secure"	SSL may need a few extra minutes. If after 30 min still no HTTPS, contact support.

Previous: [Chapter 14 — Settings](#) | Next: [Chapter 16 — Email](#) →

CHAPTER 16

Chapter 16 — Email Configuration

*16 email settings*

Overview

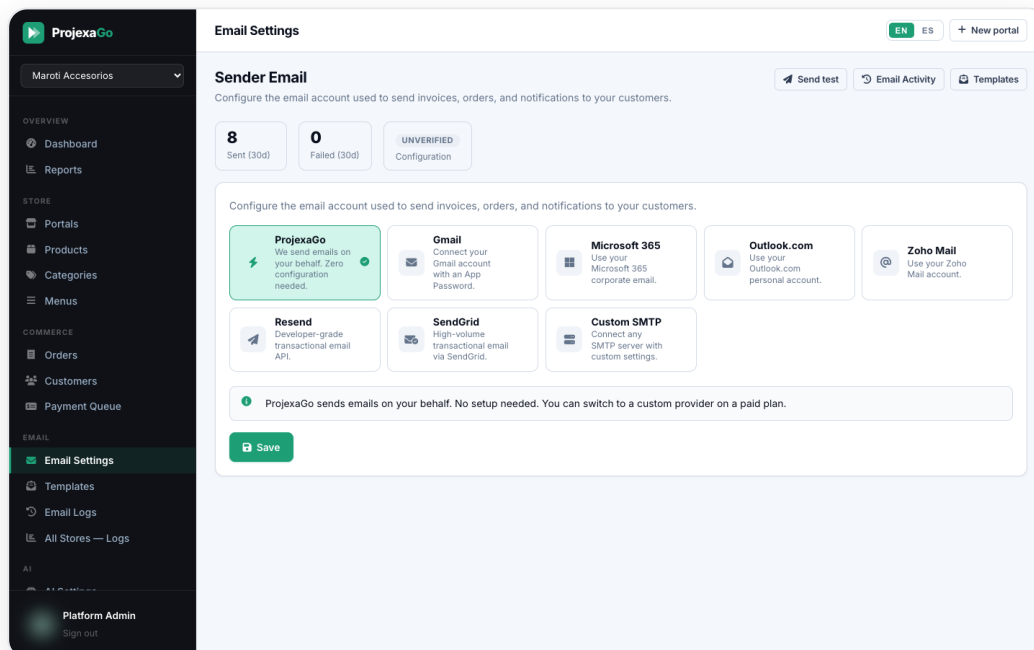
ProjexaGo sends automatic emails to your customers at every stage of the order cycle. The **Email** module lets you configure the sending provider, customize templates and monitor delivery health.

Access: **Side menu** → **Email** (Owner or Admin)

Email Providers

Provider	Type	Notes
Platform email	Managed	ProjexaGo sends on your behalf (generic domain). Works without configuration.
Gmail / Google Workspace	SMTP	Use your Gmail or G Suite account
Microsoft 365 / Outlook	SMTP	Use your Microsoft corporate account
Zoho Mail	SMTP	Use your Zoho account
Custom SMTP	SMTP	Any SMTP server (Resend, SendGrid, Mailgun, etc.)

Configuring SMTP



16 email smtp config

Gmail 1. Enable 2-step verification on your Google account 2. Generate an ****App Password**** (Google Account → Security → 2-Step Verification → App passwords) 3. In ProjexaGo, select ****"Gmail"**** 4. Enter: Sender email, sender name, app password 5. Click ****"Test configuration"**** → if successful, ****"Save"****

Microsoft 365 / Outlook

Select "**Microsoft 365**" → enter email, sender name, password (or app password) → test → save.

Custom SMTP

Select "**Custom SMTP**" → enter host, port (587/TLS or 465/SSL), username, password, sender email, sender name → test → save.

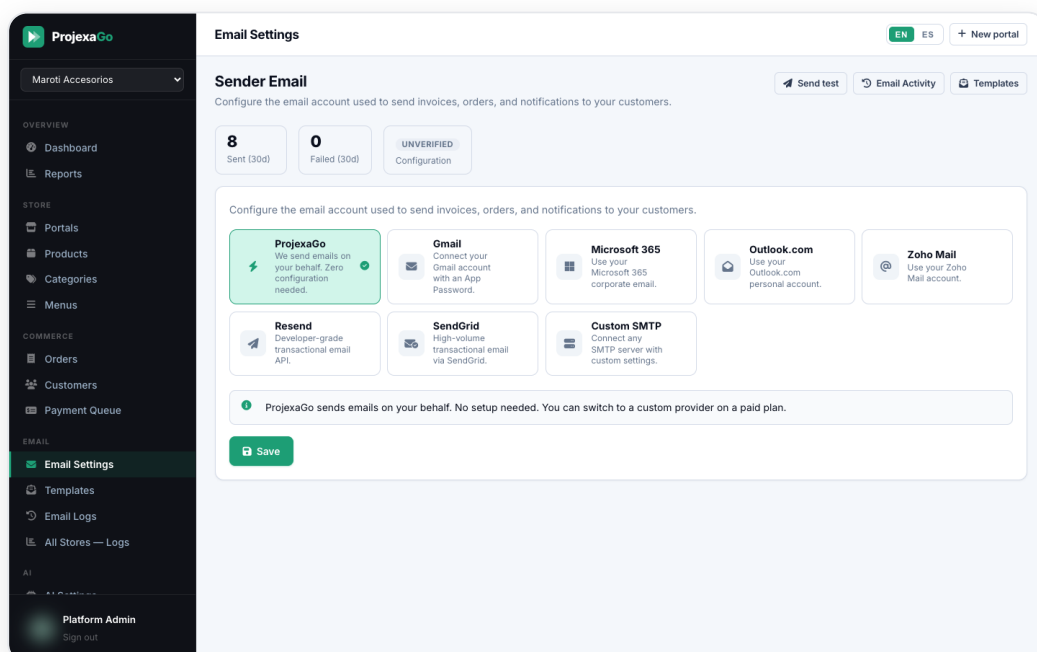
💡 **Recommendation:** For high volumes (100+/day), use a dedicated transactional provider like **Resend**, **SendGrid** or **Mailgun** — more reliable than Gmail/Outlook for automatic emails.

Configuration Levels

- **Organization level:** Default email provider for all your portals
- **Portal level:** Each portal can have its own different provider

Switch between levels: **Email** → **Email source** → "Use organization email" or "Use this portal's own email"

Email Templates



16 email templates

ProjexaGo includes professional templates for all order cycle emails.

Available templates: Order confirmation · New order (to owner) · Payment instructions · Payment received · Payment approved · Payment rejected · Status update · Order delivered · Account created · Portal created · Customer message · Support update · Invoice issued · Credit note issued · Subscription charge created · Subscription payments (multiple stages) · Renewal reminder · Past due notice · Suspension notice

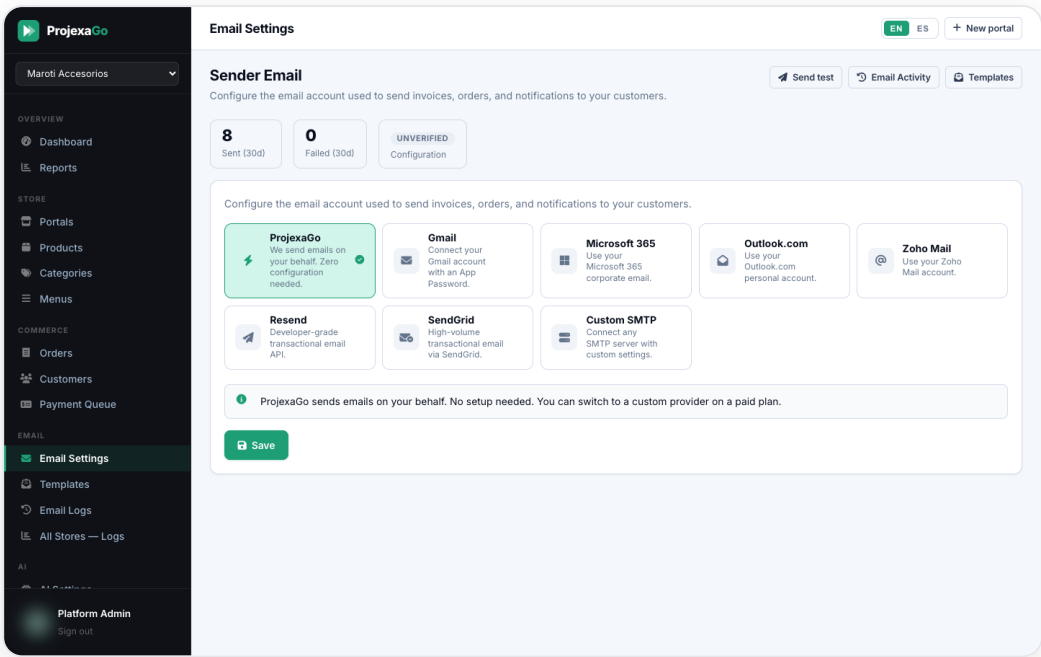
Editing a Template

1. Select the template
2. Modify the subject and HTML body
3. Available variables (auto-replaced):
 - `{{customer_name}}` · `{{order_number}}` · `{{order_total}}`
 - `{{store_name}}` · `{{tracking_url}}` · `{{payment_instructions}}`
 - And more per template type
4. Click "**Save template**"

Send a Test Email

From the template editor, click "**Send test**" to receive the email in your inbox and verify appearance.

Email Logs & Statistics



16 email logs

- **Statistics**** (last 30 days): Total sent, successful, failed, delivery rate
- **Logs:**** Per-email record with recipient, template used, status, timestamp, error message (if failed)

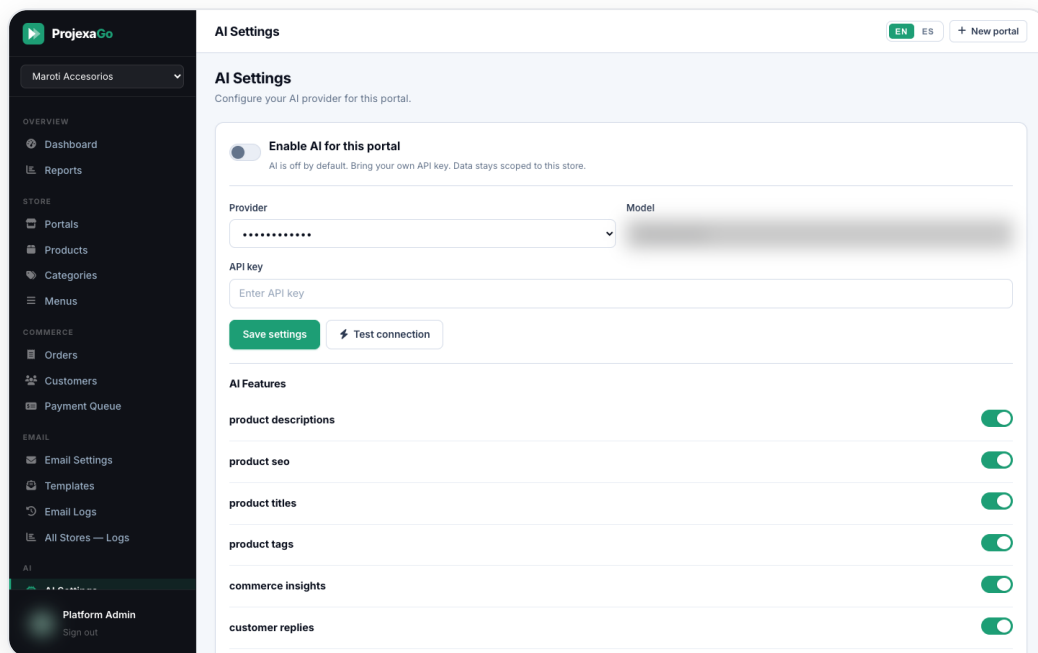
Troubleshooting

Problem	Solution
Emails going to spam	Configure SPF/DKIM records on your email domain. Use a transactional provider for high volumes.
"Authentication Failed" error	Gmail: use an App Password, not your regular password.
Emails not sending	Run a configuration test from the panel. Check logs for the specific error.
Generic sender name showing	Update "Sender name" in email configuration settings.

Previous: [Chapter 15 — Domains](#) | Next: [Chapter 17 — AI](#) →

CHAPTER 17

Chapter 17 — Artificial Intelligence (AI)

*17 ai settings*

Overview

ProjexaGo's **AI tools** are available on **Pro and Enterprise plans**. They automate and enhance various business tasks — from generating product descriptions to analyzing sales performance.

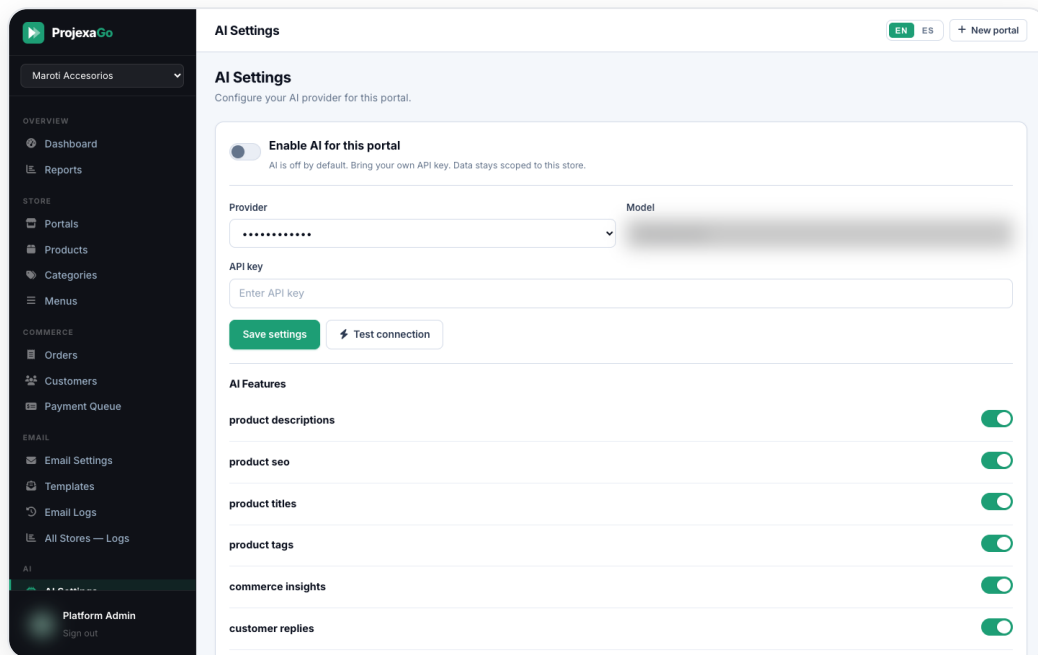
Access: **Side menu** → **AI** (Owner or Admin, Pro/Enterprise plan)

AI Providers

Provider	Models	Use cases
Anthropic (Claude)	Claude 3.5 Sonnet, Claude 3 Haiku	Descriptions, analysis, conversational assistant
OpenAI	GPT-4o, GPT-4o mini	Descriptions, analysis, conversational assistant

 **Note:** Bring your own API key from either provider. Keys are stored encrypted. If you don't configure your own key, AI runs on platform credits if available in your plan.

Configuring an AI Provider



The screenshot displays the 'AI Settings' page in the ProjexaGo dashboard. On the left is a dark sidebar with the ProjexaGo logo and a list of navigation items: Overview (Dashboard, Reports), Store (Portals, Products, Categories, Menus), Commerce (Orders, Customers, Payment Queue), Email (Email Settings, Templates, Email Logs, All Stores — Logs), and AI (AI Settings). The main content area has a header 'AI Settings' with a sub-header 'Configure your AI provider for this portal.' Below this is a toggle switch for 'Enable AI for this portal' with a note: 'AI is off by default. Bring your own API key. Data stays scoped to this store.' The 'Provider' is selected from a dropdown menu, and the 'Model' is shown in a blurred box. An 'API key' input field is present with a placeholder 'Enter API key'. Below the input are two buttons: 'Save settings' and 'Test connection'. At the bottom, there is a section titled 'AI Features' with a list of features and their corresponding toggle switches: product descriptions, product seo, product titles, product tags, commerce insights, and customer replies. All toggles are currently turned on.

17 ai config

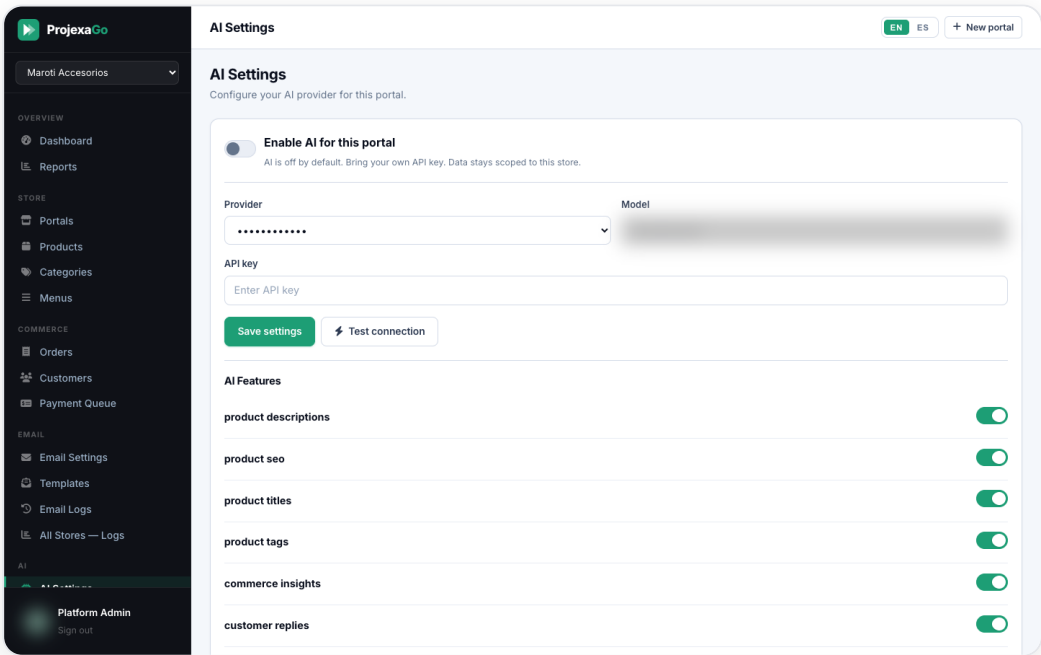
1. Go to **AI → Configuration**
2. Select the provider (Anthropic or OpenAI)
3. Enter your **API key**
4. Set a **monthly token limit** (to control spend)
5. Click **"Test connection"** → if successful, save

Available AI Features

Feature	Description
Product descriptions	Auto-generates full product description
Product SEO	Generates search-engine-optimized meta descriptions
Product titles	Optimizes product name for clarity and SEO
Product tags	Auto-generates relevant search tags
Commerce insights	Analyzes sales performance and gives recommendations
Customer replies	Generates draft replies for support cases
Store assistant	AI chatbot to answer customer questions in the store
Catalog import	AI field mapping for non-standard import files

Each feature can be individually enabled or disabled.

Generating AI Content (Products)

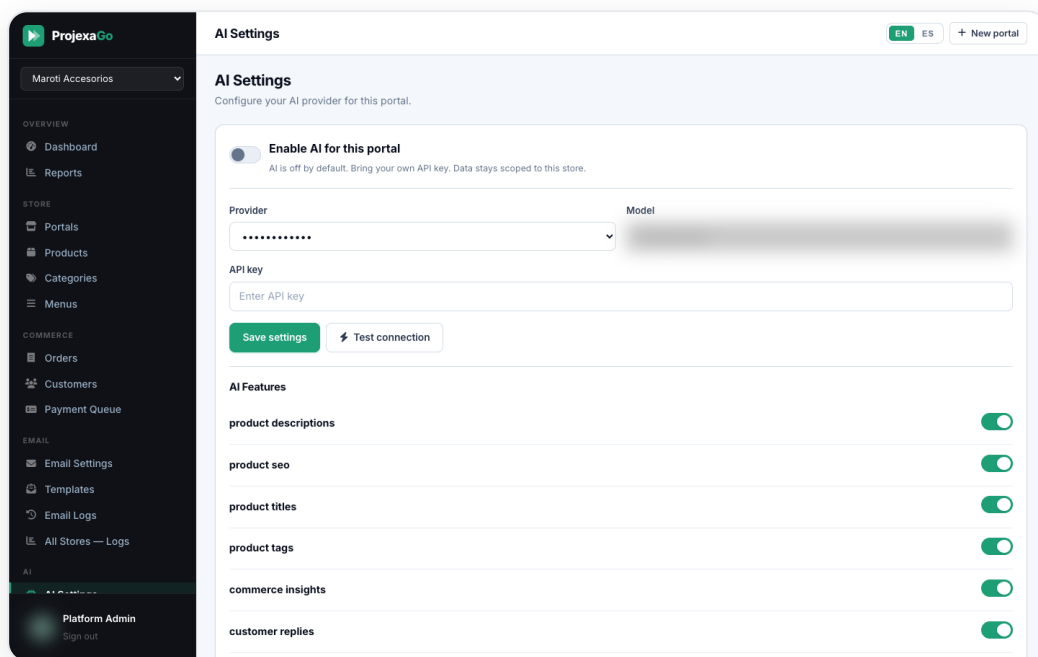


17 ai generate description

1. Go to a product's detail page
2. Click **"Generate with AI"** next to the description, SEO, or tags field
3. AI analyzes the product name, category and price
4. Generates professional content in seconds
5. Review, edit if needed, accept → Save

 **Tip:** Quality improves when the product has a descriptive name, an assigned category, and a brand specified. The more context the AI has, the better the output.

The AI Assistant (Business Analysis)



17 ai assistant

A conversational interface where you ask the AI questions about your business:

- "What are my best-selling products this month?"
- "How many orders are waiting for payment review?"
- "Which products are below low-stock threshold?"
- "What's the average order value for the last 30 days?"
- "Which customers haven't purchased in the last 60 days?"

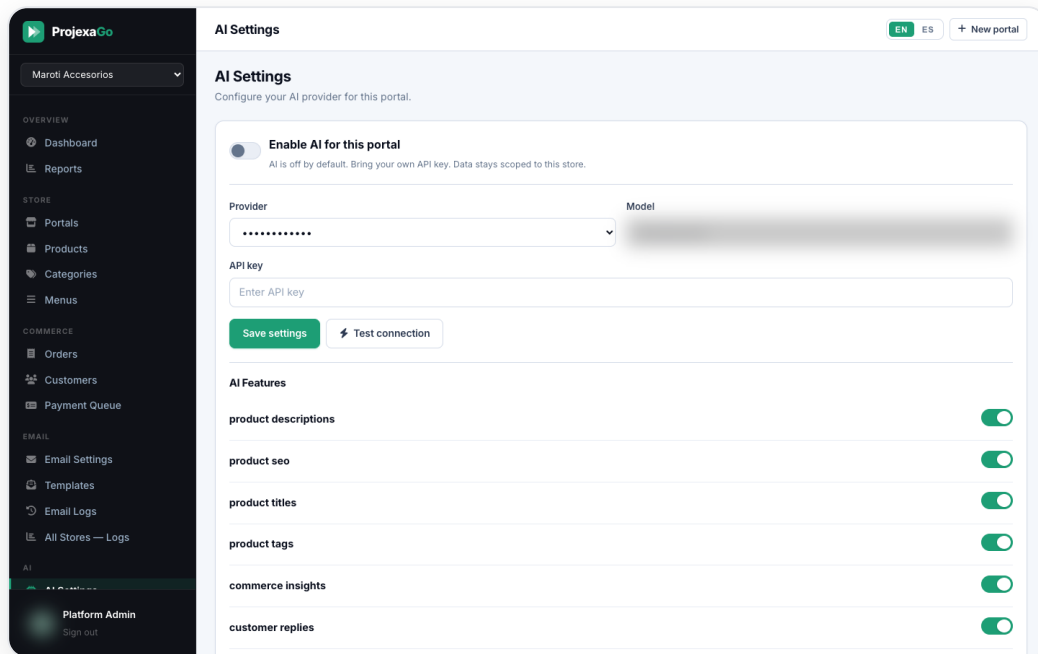
The AI has real-time access to your store data and delivers analysis directly in the chat.

AI-Assisted Catalog Import

When importing non-standard product files (see Chapter 7):

1. Upload your file (any tabular format)
2. AI analyzes columns and proposes field mapping
3. Review and adjust mapping
4. Confirm import

Usage Monitoring



17 ai usage

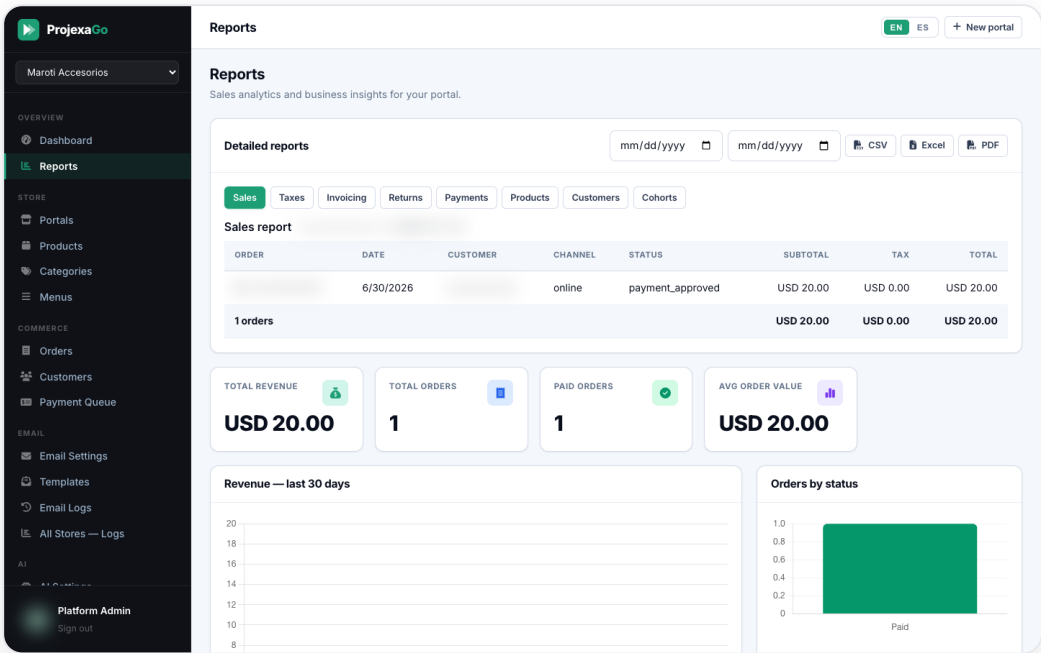
****AI → Usage:**** - Input tokens used (text sent to AI) - Output tokens generated (AI responses) - Estimated cost at provider rates - Daily history chart

 **Tip:** Set a monthly token limit to avoid billing surprises from your AI provider. The system stops using AI once the limit is reached until the next month.

Previous: [Chapter 16 — Email](#) | **Next:** [Chapter 18 — Reports](#) →

CHAPTER 18

Chapter 18 — Reports & Analytics



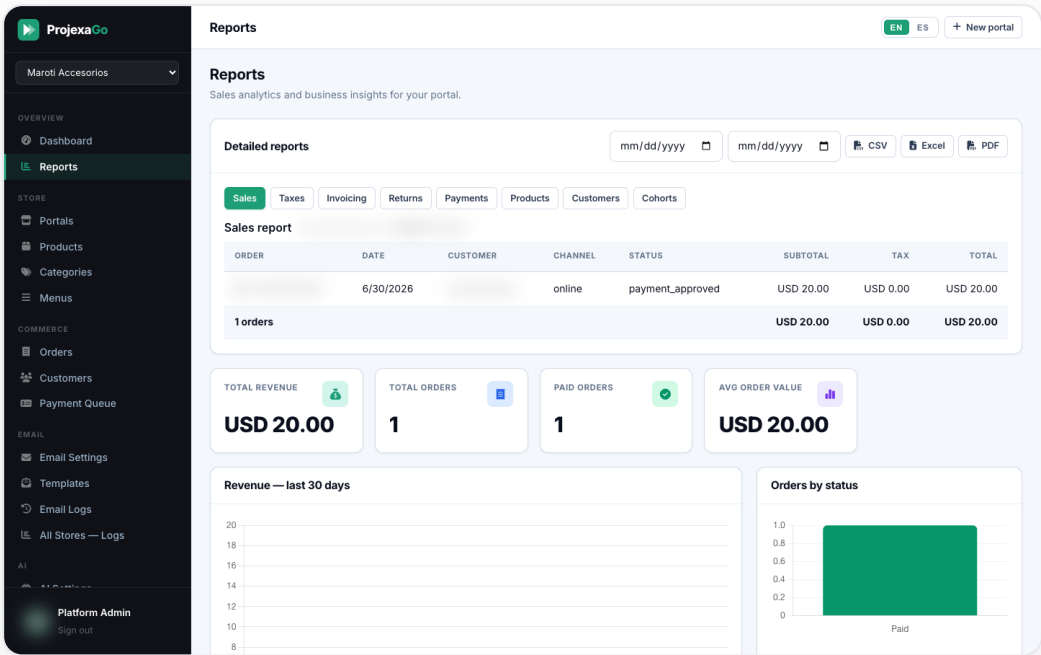
18 reports main

Overview

The **Reports** module provides detailed business analysis for better decision-making. Access: **Side menu → Reports** (all roles)

Available Report Types

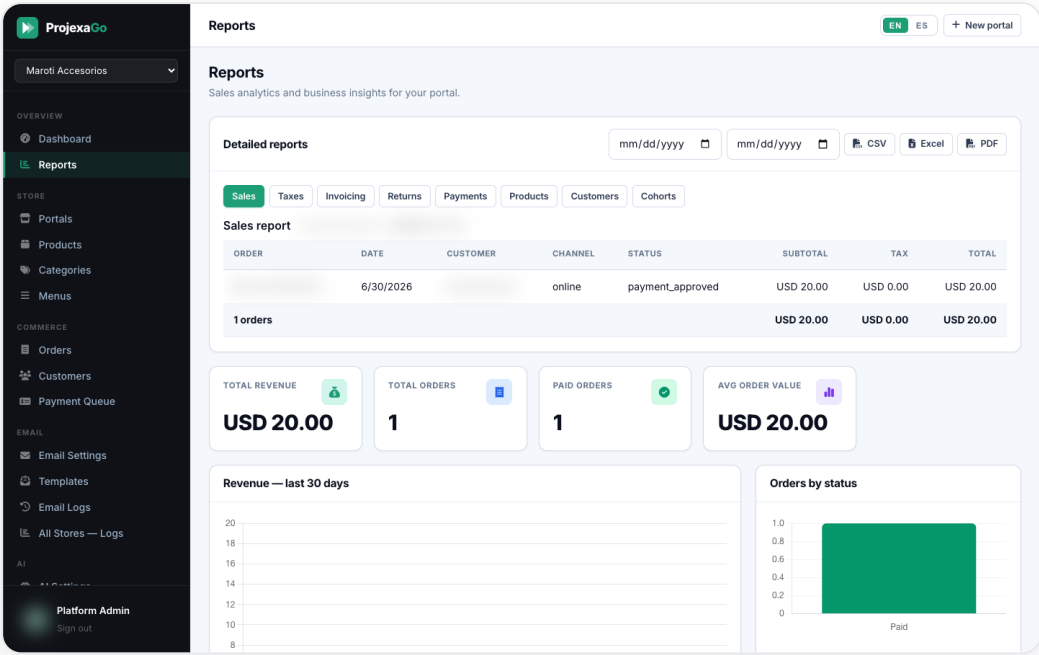
Sales Report



18 report sales

****Metrics:**** Total orders (by status), total revenue, average order value, daily/weekly/monthly trend ****Filters:**** Date range, order status, sales channel ****Export:**** CSV, XLSX, PDF

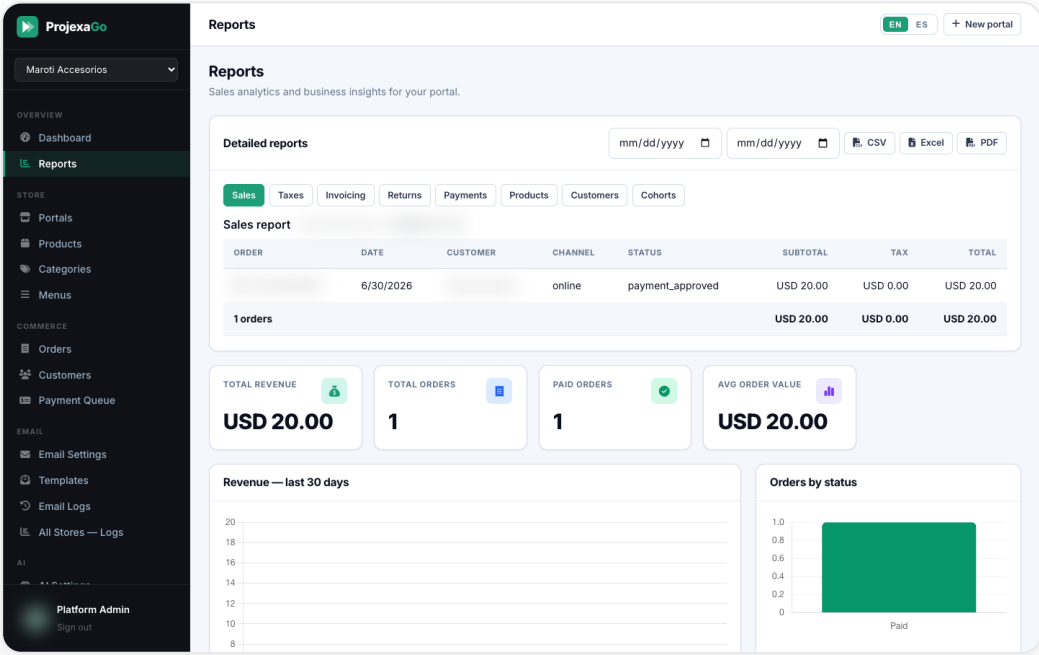
Tax Report



18 report taxes

****Metrics:**** Total sales by tax rate, tax collected amount, taxable base, period breakdown ****Filters:**** Billing period, specific tax rate ****Export:**** CSV, XLSX, PDF

Inventory Report



18 report inventory

****Metrics:**** Full product list with current stock, low-stock products, out-of-stock products, total inventory value ****Filters:**** Category, status, low-stock only / out-of-stock only ****Export:**** CSV, XLSX, PDF

Exporting Reports

Format	Best for
CSV	Import into Excel, Google Sheets or other systems
XLSX	Open directly in Excel with formatting
PDF	Print or share with accountants, partners

Steps: Configure filters → Click **"Export"** → Select format → File downloads automatically.

Dashboard vs. Reports

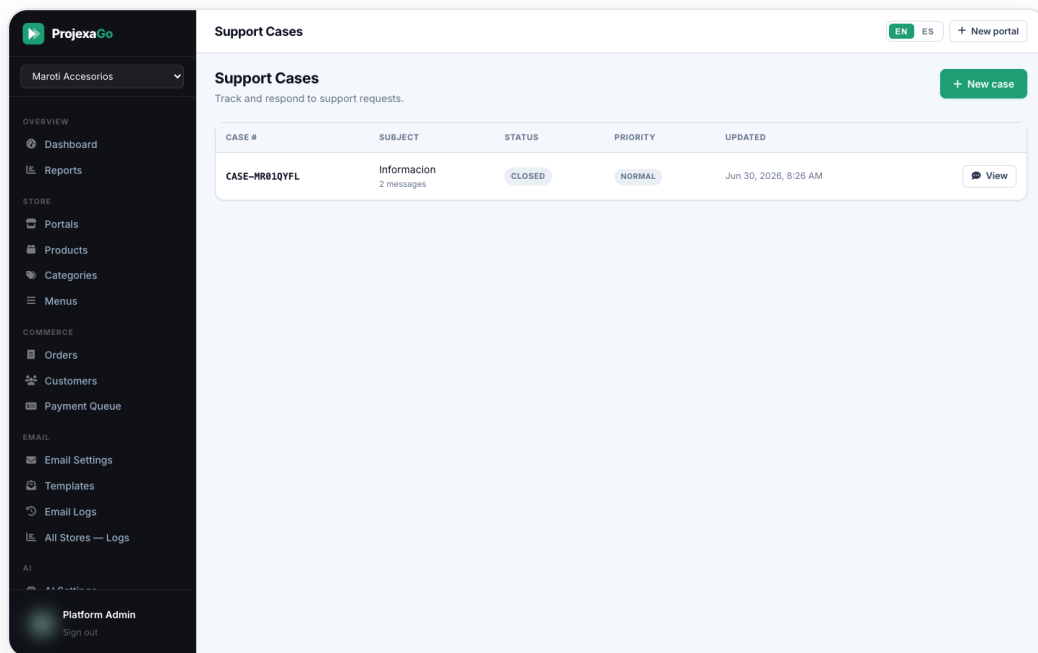
Need	Use
Current business status at a glance	Dashboard
Detailed period analysis	Reports
Data for accounting or auditing	Reports (with export)
Identify growth trends	Reports (sales chart)
Which products to restock	Dashboard (low stock) or Inventory Report

Previous: [Chapter 17 — AI](#) | Next: [Chapter 19 — Support](#) →



CHAPTER 19

Chapter 19 — Support & Help Cases



19 support list

Overview

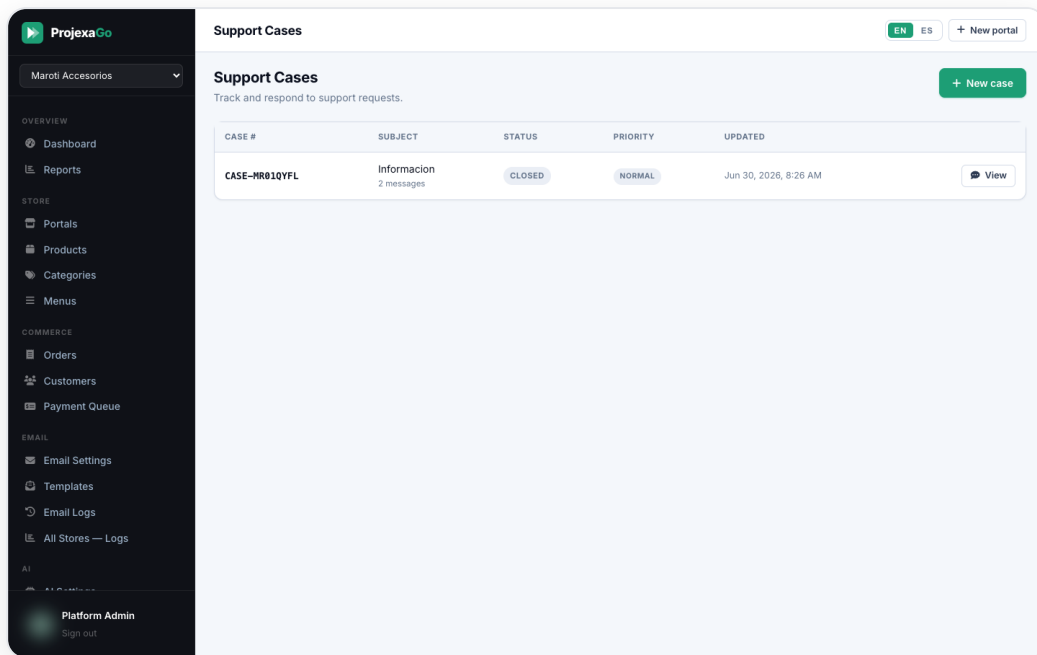
The **Support** module manages help cases opened by your customers from the public storefront. Access: **Side menu** → **Support** (all roles)

Case List

Columns: Case #, customer, title, status (Open / In Progress / Pending / Resolved / Closed), priority (Low / Medium / High / Urgent), linked order, last update

Filters: By status, priority, date range

Case Detail



19 support detail

Shows: Customer data, problem description, linked order, message history (chronological conversation), current status and priority.

Reply to a Case

1. Write your reply in the message field
2. Click **"Send"** — customer receives your reply by email
3. Customer can respond from their email or from the storefront

Update Status & Priority

- **Open** → **In Progress** → **Pending** (waiting for customer info) → **Resolved** → **Closed**
- Update priority based on urgency

💡 **Tip:** Use *"Pending"* when waiting for customer response.
"Resolved" when the problem is fixed (but follow-up may come).
"Closed" when definitively finished.

How Customers Open Cases

From the public storefront:

1. **My account** → **Support** → **"Open case"**
2. Write title and description, optionally link to an order, set priority
3. Submit — customer receives confirmation email with case number and can track from their account

Best Practices

1. **Respond quickly** — first response time directly impacts customer satisfaction. Aim for under 24 hours.
2. **Be specific** — mention the order number, product or specific situation. Avoid generic responses.
3. **Keep status updated** — customers know you're working on their problem when status changes.
4. **Close resolved cases** — keeps your active case list clean and meaningful.

Previous: [Chapter 18 — Reports](#) | Next: [Chapter 20 — Mobile App](#) →

CHAPTER 20

Chapter 20 — ProjexaGo Mobile App

Overview

The **ProjexaGo mobile app** is the native iOS and Android version of the platform, letting you manage your store from anywhere.

Availability:

- **PWA (Progressive Web App):** Install directly from your phone's browser — available now
- **App Store (iOS):** Coming soon
- **Google Play (Android):** Coming soon

Installing the App (PWA)

On iPhone / iPad (iOS 15+)

1. Open **Safari** on your iPhone
2. Go to <https://app.projexago.com>
3. Log in with your account
4. Tap the **share button** (box with arrow icon)
5. Select **"Add to Home Screen"**
6. Name the app "ProjexaGo" and tap **"Add"**
7. The app appears on your home screen like a native app

On Android (Chrome 100+)

1. Open **Chrome** → go to <https://app.projexago.com>
2. Log in
3. Chrome shows an install banner, or tap menu (:) → **"Install app"** or **"Add to Home screen"**

4. Confirm → app appears on home screen

Main Screens

Screen	Description
Dashboard	Daily orders, revenue, pending items, low stock
Store selector	Switch between portals (multi-store plans)
Orders	Full order list, status advancement, new sale creation
Catalog	Products list, edit details, update price/stock
Customers	Customer list, profile view, order history
More	Settings, team, domains, billing, invoices

Mobile vs. Web Management panel

Feature	Web	Mobile
Full dashboard	✓	✓ (simplified)
Order management	✓	✓
Full catalog	✓	✓ (basic view/edit)
Bulk import	✓	✗
Category editor	✓	✗
Email configuration	✓	✗
AI configuration	✓	✗
Email templates	✓	✗
Reports & export	✓	✗
New in-person sale	✓	✓
Creation wizard	✓	✓
Team management	✓	✓ (basic)
Domains	✓	✓ (view)
Billing	✓	✓ (view)

 **Tip:** Use the **web management panel** for settings, imports, reports and complex management. Use the **mobile app** for daily order review, real-time stock updates and point-of-sale transactions.

Automatic Updates

As a PWA, the app updates automatically when new versions are released. No manual update or reinstall needed — just open the app with internet connection.

Previous: [Chapter 19 — Support](#) | **Next:** [Chapter 21 — FAQ](#) →

CHAPTER 21

Chapter 21 — Frequently Asked Questions (FAQ)

About the Platform

Do I need technical knowledge to use ProjexaGo?

No. Everything — branding, catalog, payments, emails and AI — is configured through the wizard and management panel without writing any code. If you can use a spreadsheet, you can use ProjexaGo.

Does ProjexaGo charge a commission on my sales?

No. ProjexaGo charges a fixed monthly/annual subscription, with zero commissions on your sales. 100% of each order's value is yours.

Is my data isolated from other businesses?

Yes. ProjexaGo is multi-tenant by design. Every product, order, customer, email and configuration is scoped to your account and never shared.

Can I have multiple stores?

Yes. Pro plan supports up to 3 stores. Enterprise supports up to 50. Each store is completely independent with its own catalog, customers and orders.

Does it work in my country?

ProjexaGo supports multiple currencies, languages and countries. The manual payment system works with any bank or digital wallet in your country.

About Payments

How do payments work?

ProjexaGo uses a manual payment workflow. The customer places an order, you send payment instructions (bank details, wallet, etc.), the customer pays and uploads proof, and you review and approve it. All steps generate automatic email notifications.

Does ProjexaGo process payments directly (like Stripe or PayPal)?

No. ProjexaGo is not a payment gateway. It's designed for businesses that receive payments via bank transfer, digital wallets, cash or other manual methods. Direct credit/debit card integration is not currently available.

What if a customer uploads a fake proof?

You always review and verify the proof before approving payment — it's never auto-approved. If you detect an invalid or manipulated proof, reject it with an explanatory message.

About Plans

Does the Free Trial require a credit card?

No. Start the 14-day Free Trial without entering any payment information.

What happens when the Free Trial ends?

Your account stays active but limited. You cannot create new orders until you select a paid plan. Your data (products, customers, orders) is preserved.

Can I change plans at any time?

Yes. Update or change your plan at any time from the Billing section. Changes apply when the new charge payment is confirmed.

About Email & AI

Can I use my own Gmail account to send emails?

Yes. Connect Gmail using an App Password (not your regular password). You can also use Microsoft 365, Zoho, or any SMTP server.

Is email configuration required?

Not required. If not configured, emails are sent from ProjexaGo's generic service. However, for better reliability and branding, connecting your own provider is strongly recommended.

Does the AI generate content in English?

Yes. The AI generates descriptions, SEO and tags in the language configured for your portal (Spanish or English).

How much does AI cost?

AI is included in Pro and Enterprise plans. You bring your own Anthropic or OpenAI API key and pay directly to them based on usage. ProjexaGo doesn't charge extra for AI functionality.

About Domains

Can I use a domain I already own?

Yes. Add the domain in ProjexaGo and make DNS changes at your current registrar (GoDaddy, Namecheap, Cloudflare, etc.). No domain transfer needed.

Does ProjexaGo include SSL certificates?

Yes. ProjexaGo automatically generates and renews SSL (HTTPS) certificates for your custom domain. No purchase or configuration needed on your part.

About the Mobile App

Does the mobile app cost extra?

No. The mobile app is included in all plans at no additional cost.

Does the app work offline?

The app requires an internet connection to operate, as it works in real time with your store data.

Support & Contact

How do I contact ProjexaGo support?

Email admin@projexaai.com. Support level depends on your plan: community (Free Trial), email (Basic), priority (Pro), dedicated (Enterprise).

Previous: [Chapter 20 — Mobile App](#) | Next: [Chapter 22 — Troubleshooting](#) →

CHAPTER 22

Chapter 22 — Troubleshooting

Access & Account Issues

Symptom	Solution
"Invalid credentials"	Verify email and password are correct. Email is case-sensitive.
Forgot password	Use " Forgot your password? " on the login screen.
Account locked	After multiple failed attempts, wait 15 minutes and try again. If persists, contact support.
"Pending activation" status	Payment is still under review. Check the activation screen. Ensure you've uploaded proof.
Team member: "Invalid password"	New members receive a temporary password they must change on first login. Ask the owner to resend credentials.

Portal & Storefront Issues

Symptom	Solution
Store shows 404 error	Verify the portal is published (not draft) in the Portals section.
Store changes not reflected	Try incognito mode or force-refresh (Ctrl+Shift+R / Cmd+Shift+R).
Products not showing in store	Check: product status = Active, category is Active, stock > 0 (if tracking enabled).

Order Issues

Symptom	Solution
Customer didn't receive order email	Check Email → Logs. If "sent" — likely in spam. If "failed" — check email configuration.
Cannot advance order status	Verify you're following the correct flow. Some statuses require customer action first.

Payment Issues

Symptom	Solution
Customer uploaded proof but not in queue	Ask customer to verify upload was successful. Try refreshing. If persists, ask for re-upload.
Proof is unreadable	Reject with message requesting a clearer image or PDF.

Email Issues

Symptom	Solution
Emails going to spam	Configure SPF/DKIM records. Use a transactional provider for high volumes.
"Auth Failed" for Gmail	Must use an App Password, not regular Gmail password.
Emails not sending	Run configuration test from the panel. Check logs for specific error message.

Domain Issues

Symptom	Solution
Still "Pending DNS" after 48h	Verify DNS records exist. Use dnschecker.org to check propagation. If correct, click "Retry verification".
SSL error after DNS verified	SSL provision can take up to 30 extra minutes. If >1 hour, contact support with your domain.

Mobile App Issues

Symptom	Solution
App not updating	Close app completely and reopen with internet connection.
Cannot install on iPhone	Must use Safari (not Chrome or other browsers) on iOS.

Bulk Import Issues

Symptom	Solution
Import file fails validation	Check: file $\leq$ 25 MB, required columns (name, price) present, use downloadable template as base.
Imported products not in store	Verify imported products have Active status.

Contacting ProjexaGo Support

Channel	Response time	Plan
Email: admin@projexaai.com	48 business hours	All
Priority email support	24 business hours	Basic
Priority support	8 business hours	Pro
Dedicated support	Real-time	Enterprise

When contacting support, include:

1. Your registered account email
2. Your portal/store name
3. Detailed problem description
4. Screenshots if applicable
5. Order number if order-related

Previous: [Chapter 21 — FAQ](#) | Back to index: [→ Index](#)
