

# KUERATE

## User Manual

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*Professional · CRM*

Version 1.0 · May 2026

***Your time has a value.***

# Part 1 — Professional

The Professional side of Kuerate is your curated inbox, your public profile, and your feed. Everything is designed to give you control over who reaches you and how your time is valued.

## 1.1 Your Profile

Your public profile is visible at [kuerate.vercel.app/\[your-username\]](https://kuerate.vercel.app/[your-username]) (based on your email prefix). It shows your name, title, company, bio, career history, cause allocations, and engagement score.

<b>Avatar</b>	Upload a profile photo in Settings → Profile. Recommended: square, minimum 400×400px.
<b>Bio</b>	Write a concise professional summary. Shown on your public profile and in search results.
<b>Status</b>	A short line shown prominently on your profile (e.g. 'Open to board roles').
<b>Interest tags</b>	Add keywords so others can find you by interest. Used for feed personalisation.
<b>LinkedIn URL</b>	Optional. Shown as a link on your public profile.

## 1.2 Access Rate

Your access rate determines what it costs someone to send you a cold message. The donation goes directly to your nominated charity – not to Kuerate.

<b>Suggested donation</b>	The amount you suggest a sender donates to your charity to reach you. Set in Settings → Access rate.
<b>Path A</b>	Senders with a completed giving profile and matching values can reach you for free. Message is delivered immediately.
<b>Path B</b>	Standard outreach. Sender donates to your charity. Message is delivered within your set delay (e.g. 1 day with donation, 10 days without).
<b>Delay days</b>	You set how quickly messages are delivered – with donation vs without. Shorter delay incentivises giving.
<b>Open inbox</b>	Set suggested donation to \$0 for a fully open inbox. All messages delivered immediately at no cost to sender.

✦ *Set your access rate in Settings → Access Rate. Choose a charity before activating – your profile won't appear as active without one.*

## 1.3 Requests Inbox

All inbound outreach appears in the Requests tab on your dashboard. Each message shows the sender's name, category, subject, and whether a donation was made.

### Actions on each message

- Accept – Opens an in-app conversation thread. Sender is added to your CRM contacts.
- Decline – Message is closed. Sender is notified.
- Defer – Message moves to the bottom of your queue for review later.

### Filters

- Filter by status: All, Pending, Accepted, Declined, Deferred
- Filter by category: Sales/BD, Recruitment, Partnership, Press, General

✦ *Accepted messages automatically create a connection and open an in-app thread. You don't need to reply via email.*

## 1.4 Messages & Threads

Once you accept a message, a conversation thread opens inside Kuerate. All replies stay on-platform – no lost emails.

<b>Inbox</b>	View all active threads at Dashboard → Messages. Sorted by most recent activity.
<b>Thread view</b>	Bubble-style chat interface. Your messages appear on the right, theirs on the left.
<b>Send</b>	Type your message and press Enter (or click the gold send button). Shift+Enter for a new line.
<b>Read receipts</b>	'Read' appears under your last sent message once the other person opens the thread.
<b>Polling</b>	Threads refresh every 10 seconds automatically. No need to reload.

## 1.5 Feed

The feed shows posts from your network and the wider Kuerate community. Posts are ranked by engagement and recency within a 14-day window – so the feed stays fresh without feeling algorithmic.

### Posting

- Click 'Share an insight with your network...' to open the composer.
- Select a category (Industry insight, Opinion, Announcement, Event, Job opportunity, Cause/charity, Case study, General).
- Select your AI disclosure level – this is mandatory on every post.
- Optionally attach an image.
- Click Post to publish.

### AI Disclosure tiers

<b>0% – Fully human</b>	Written entirely by you, no AI assistance.
<b>25% – AI-assisted</b>	You wrote the post; AI helped with phrasing or grammar.
<b>50% – Co-written</b>	Roughly equal contribution between you and AI.
<b>75% – Mostly AI</b>	AI-generated with your editing and direction.
<b>100% – AI-generated</b>	Fully generated by AI, published as-is.

✦ Use the AI content filter to show only Human or ≤25% AI posts. Your filter preference is remembered per session.

## 1.6 Message Limits (Free plan)

Free accounts can send 5 outreach messages per calendar month. On the 5th message you receive a grace prompt – you can send it and you'll be at your limit. Limits reset on the 1st of each month.

<b>Free plan</b>	5 outreach messages per month + 1 grace message.
<b>Pro plan</b>	Unlimited outreach messages at \$49/month.
<b>Reset</b>	Calendar month – resets on the 1st of each month.
<b>Upgrade</b>	Click 'Upgrade to Pro' in the limit modal, or go to Pricing.

## Part 2 — CRM

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The Kuerate CRM is a full relationship management system built natively into the platform. Import your LinkedIn network, track every professional relationship, and manage your outreach pipeline — all in one place.

### 2.1 Contacts

Your contacts tab shows everyone in your network — whether they're on Kuerate or not. Contacts can be added manually, imported from LinkedIn, or created automatically when someone accepts your outreach.

#### Contact filter bar

<b>All</b>	Every contact in your database.
<b>Connected</b>	Contacts who have accepted your Kuerate outreach (In Conversation or Meeting Booked stage).
<b>On Kuerate</b>	Contacts who have a matched Kuerate profile — you can message them directly on-platform.
<b>In pipeline</b>	Contacts with an active deal at any pipeline stage.
<b>External</b>	Contacts not yet on Kuerate — invite them or reach out via email.

#### Contact card actions

- Click a contact name → opens the contact drawer with Overview, Message, and History tabs.
- Star rating → rate a contact 1–5 stars for quick prioritisation.
- Category dropdown → classify contacts (Client, Colleague, Investor, Mentor, Partner, Prospect, Advisor).
- Message → for On Kuerate contacts, opens their profile for direct messaging.
- Send Message → for external contacts, sends an invitation email.

#### Contact drawer — tabs

<b>Overview</b>	Edit contact details, view and set pipeline stage, add notes, manage deals.
<b>Message</b>	Log a private note, send an email, or open the Kuerate thread if connected.
<b>History</b>	Full interaction log — Kuerate messages, notes, emails, and CRM activity in one timeline.

✦ *Contacts are auto-created when someone accepts your outreach – their name, email, and matchedUserId are populated automatically and their deal advances to In Conversation.*

## 2.2 Pipeline

The pipeline is a kanban-style board showing your active deals across all stages. Each card represents a professional relationship at a specific stage of progression.

### Pipeline stages

<b>Prospecting</b>	Identified as a target – no outreach sent yet.
<b>Outreach Sent</b>	Message sent via Kuerate. Awaiting response.
<b>In Conversation</b>	Message accepted. Active thread open. Auto-set on acceptance.
<b>Meeting Booked</b>	Meeting or call confirmed.
<b>Closed</b>	Deal concluded – won, lost, or relationship matured.

### Moving a deal

- Click → on a pipeline card to advance to the next stage.
- Click ← to move back a stage.
- Click × to delete the deal.
- Click the contact name on a card to go to their profile (if on Kuerate) or open their contact drawer.

### Adding a deal manually

- Click '+ Add deal' in the top right of the Pipeline tab.
- Enter a title, select a stage, and add optional notes.
- Click 'Add deal' to save.

✦ *Deals are created automatically when your outreach is accepted – no need to add them manually for Kuerate connections.*

## 2.3 Organisations

Organisations are automatically created from your contacts' email domains. Each org page shows all Kuerate members from that organisation, their roles, and engagement data.

<b>Auto-creation</b>	Created automatically when a contact with a business email domain is added.
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<b>Enrichment</b>	Organisation data (industry, employee count, LinkedIn) is enriched via Apollo.io.
<b>Members</b>	Shows all Kuerate users from that organisation's email domain.
<b>View</b>	Click 'View org →' to open the full organisation page.

## 2.4 Outreach

The Outreach tab shows a log of all messages you have sent via Kuerate – with status, delivery date, and donation amount.

<b>Pending</b>	Message sent, awaiting acceptance or decline from the recipient.
<b>Accepted</b>	Message accepted. 'View thread →' opens the in-app conversation.
<b>Declined</b>	Message declined by the recipient.
<b>Deferred</b>	Recipient has deferred – they may respond later.
<b>Donation</b>	Amount donated to the recipient's charity on send. Shows \$0 for Path A senders.

## 2.5 Targets (ICP Search)

The Targets tab is your Ideal Customer Profile search – find professionals on Kuerate by role, company, country, industry, or cause alignment.

### Running a search

- Enter search criteria in the search panel (name, company, title, country, category).
- Results show matching Kuerate users with engagement scores and profile links.
- Click 'Message →' to go to their profile and send outreach.

### Saved searches

- Click 'Save search' to name and save your current filter.
- Saved searches appear in the left sidebar for quick access.
- Delete a saved search by clicking × next to its name.

✦ Save your most-used ICP criteria (e.g. 'CFO Australia') for one-click access to your ideal targets.

## 2.6 Spend

The Spend tab shows your total outreach investment and how much has gone to charity on your behalf.

<b>This month</b>	Total spend on outreach donations in the current calendar month.
<b>To charity</b>	Amount routed directly to recipient charities (92% of each donation).
<b>Platform fee</b>	8% processing and platform fee retained by Kuerate.

# Part 3 — Settings & Quick Reference

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## 3.1 Settings

Access Settings from the top navigation bar. Settings are organised into tabs.

<b>Profile</b>	Edit your name, title, company, bio, avatar, LinkedIn URL, status, and interest tags.
<b>Access Rate</b>	Set your suggested donation amount, charity, and delivery delays (with/without donation).
<b>Charity</b>	Search and select your nominated charity from 1.7M registered charities (AU, UK, US).
<b>Giving Profile</b>	Complete your giving profile to unlock Path A access – reach aligned professionals for free.
<b>Account</b>	Email, password, and notification preferences.

## 3.2 Notifications

Kuerate sends email notifications for the following events:

- New inbound message received
- Message accepted by a professional
- Message declined
- New thread reply
- Founding member confirmation (on waitlist signup)

✦ *All notification emails are sent from [hello@connect.kuerate.com](mailto:hello@connect.kuerate.com). Add this to your safe sender list to ensure delivery.*

## 3.3 Import

Import your LinkedIn network to populate your CRM contacts. Navigate to Dashboard → Import LinkedIn.

- Export your LinkedIn connections as a CSV from LinkedIn → Settings → Data Privacy → Get a copy of your data.
- Upload the connections.csv file on the import page.
- Kuerate matches imported contacts to existing Kuerate users automatically.
- Unmatched contacts are added as external contacts for future outreach.

✦ *LinkedIn import is optional. Your CRM will also populate automatically as you send and receive outreach on Kuerate.*

### 3.4 Plans

<b>Free</b>	5 outreach messages/month, full CRM, full feed, full profile. Grace message on 5th send.
<b>Pro – \$49/mo</b>	Unlimited outreach, giving profile (Path A access), alignment scoring, analytics, priority support.
<b>Upgrade</b>	Click 'Upgrade to Pro' in the message limit modal, or visit <a href="https://kuerate.vercel.app/pricing">kuerate.vercel.app/pricing</a> .
<b>Billing</b>	Managed via Stripe. Cancel anytime – access continues until end of billing period.

### 3.5 Quick Reference

#### Keyboard shortcuts

<b>Enter</b>	Send message in thread composer.
<b>Shift + Enter</b>	New line in thread composer.

#### Key URLs

<b>Your profile</b>	<a href="https://kuerate.vercel.app/[email-prefix]">kuerate.vercel.app/[email-prefix]</a>
<b>Dashboard</b>	<a href="https://kuerate.vercel.app/dashboard/feed">kuerate.vercel.app/dashboard/feed</a>
<b>CRM</b>	<a href="https://kuerate.vercel.app/dashboard/crm">kuerate.vercel.app/dashboard/crm</a>
<b>Messages</b>	<a href="https://kuerate.vercel.app/dashboard/messages">kuerate.vercel.app/dashboard/messages</a>
<b>Settings</b>	<a href="https://kuerate.vercel.app/dashboard/settings">kuerate.vercel.app/dashboard/settings</a>
<b>Pricing</b>	<a href="https://kuerate.vercel.app/pricing">kuerate.vercel.app/pricing</a>
<b>Help</b>	<a href="https://kuerate.com/help">kuerate.com/help</a>

#### Status definitions

<b>PENDING</b>	Message delivered, awaiting action from professional.
<b>ACCEPTED</b>	Message accepted. Thread open.
<b>DECLINED</b>	Message declined.
<b>DEFERRED</b>	Marked for later review.

<b>IN CONVERSATION</b>	Active thread following acceptance.
<b>MEETING BOOKED</b>	Meeting or call confirmed.
<b>CLOSED</b>	Deal concluded.

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