

KUERATE

User Manual

Professional · CRM

Version 2.0 · June 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 [app.kuerate.com/\[your-username\]](https://app.kuerate.com/[your-username]) (based on your email prefix). It shows your name, title, company, bio, career history, cause allocations, and engagement score.

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

◆ NEW — Profile email editing

- You can now update your email address in Settings → Profile.
- A confirmation link is sent to the new address — the change takes effect after you confirm.
- Your login credentials update automatically once confirmed.

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.

Suggested donation	The amount you suggest a sender donates to your charity to reach you. Set in Settings → Access rate.
Path A	Senders with a completed giving profile and matching values can reach you for free. Message is delivered immediately.
Path B	Standard outreach. Sender donates to your charity. Message is delivered within your set delay (e.g. 1 day with donation, 10 days without).
Delay days	You set how quickly messages are delivered — with donation vs without. Shorter delay incentivises giving.

Open inbox	Set suggested donation to \$0 for a fully open inbox. All messages delivered immediately at no cost to sender.
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✦ *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.

Inbox	View all active threads at Dashboard → Messages. Sorted by most recent activity.
Thread view	Bubble-style chat interface. Your messages appear on the right, theirs on the left.
Send	Type your message and press Enter (or click the gold send button). Shift+Enter for a new line.
Read receipts	'Read' appears under your last sent message once the other person opens the thread.
Polling	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.

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

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

◆ NEW — Post & content improvements


- Posts now have unique shareable URLs — [app.kuerate.com/posts/\[id\]](https://app.kuerate.com/posts/[id]).
- Share buttons on every post card: Copy link, Share on X, Share on LinkedIn.
- Rich Open Graph previews when links are shared in Slack, iMessage, or social media.
- Post formatting now respects paragraph breaks — posts display like a word processor.
- Repost now correctly copies the original post content and category.
- Job posts are accessible at [app.kuerate.com/jobs/\[id\]](https://app.kuerate.com/jobs/[id]) for external sharing.

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

1.6 Events

Events can be created, managed, and shared from the Events tab on your dashboard.

◆ NEW — Events — new features

- Organisers can now edit or delete events from the event detail page.
- Events can be set to Public (visible to all) or Private (invited attendees only).
- Private events show a  badge and return 404 for uninvited visitors.
- Events now have shareable URLs — [app.kuerate.com/events/\[id\]](https://app.kuerate.com/events/[id]).

- Open Graph metadata generates rich link previews when shared.
- Public/Private toggle appears in both the Create event form and Edit event modal.

1.7 Message Limits (Free plan)

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

Part 2 — CRM

The Kuerate CRM is a full relationship management system built natively into the platform. Import your 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, imported via CSV, or created automatically when someone accepts your outreach.

Contact filter bar

All	Every contact in your database.
Connected	Contacts who have accepted your Kuerate outreach (In Conversation or Meeting Booked stage).
On Kuerate	Contacts who have a matched Kuerate profile — you can message them directly on-platform.
In pipeline	Contacts with an active deal at any pipeline stage.
External	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.
- Invite → for external contacts with email, sends an invitation.
- Add email → for contacts with no email, opens drawer to add one.
- × (delete) → permanently removes the contact. Bulk delete available via checkboxes.

Contact drawer — tabs

Overview	Edit contact details (including email), view and set pipeline stage, add notes, manage deals, add to lists.
Message	Log a private note, send an email, or open the Kuerate thread if connected.
History	Full interaction log — Kuerate messages, notes, emails, and CRM activity in one timeline.
Tasks	Add, complete, and delete tasks linked to this contact. Set priority and due date.

✦ NEW — Contacts — new features

- Import CSV — import contacts from any CSV file. Flexible column detection handles any header format.
- Export CSV — export currently filtered/searched contacts as a CSV file.
- Delete contacts — single delete (× button) or bulk delete (checkboxes + Delete selected button).
- Add to Contacts button — appears on any Kuerate profile page. One click adds them to your CRM.
- Instant search — searches all contacts as you type with zero network delay.
- Virtual rendering — contacts list handles 2000+ contacts without slowdown.
- Sample data — new users get 5 pre-loaded sample contacts to explore the CRM.

✦ *Contacts are auto-created when someone accepts your outreach — their name, email, and Kuerate profile are linked automatically.*

CSV Import

Navigate to CRM → Contacts → Import CSV. Upload any CSV file — Kuerate detects column names automatically.

Supported columns	First Name, Last Name, Email, Company, Position, Category, Rating, Notes (and common variations).
Duplicates	Contacts with matching emails are skipped automatically.
Kuerate matching	If an imported email matches a Kuerate user, they are automatically linked.
Results	A summary shows how many were imported, skipped, and any errors.

CSV Export

Click Export in the contacts tab header. The export reflects your current filter and search — what you see is what you get.

Exported fields	First Name, Last Name, Email, Company, Position, Category, Rating, Pipeline Stage, On Kuerate, Notes, Added date.
Filtered export	Apply filters (On Kuerate, External, In pipeline) before exporting to get a targeted list.
File name	Automatically named kuerate-contacts-YYYY-MM-DD.csv.

2.2 Pipeline

The pipeline is a kanban-style board showing your active deals across all stages.

Prospecting	Identified as a target — no outreach sent yet.
Outreach Sent	Message sent via Kuerate. Awaiting response.
In Conversation	Message accepted. Active thread open. Auto-set on acceptance.
Meeting Booked	Meeting or call confirmed.
Closed	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.

✦ *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.

Auto-creation	Created automatically when a contact with a business email domain is added.
Members	Shows all Kuerate users from that organisation's email domain.
View	Click 'View org →' to open the full organisation page.

2.4 Outreach

Pending	Message sent, awaiting acceptance or decline.
Accepted	'View thread →' opens the in-app conversation.
Declined	Message declined by the recipient.
Deferred	Recipient has deferred — they may respond later.
Donation	Amount donated to the recipient's charity on send.

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.

- Enter search criteria (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.
- Save searches for one-click access to your ideal targets.

2.6 Lists

Organise contacts into named lists for segmented outreach and reference.

- Create lists with a name, colour, and icon.
- Add contacts to lists from the contact drawer → Overview tab.
- A contact can belong to multiple lists.

2.7 Templates

Save and reuse message templates for common outreach scenarios.

- Create templates with a subject line and body.
- Organise templates into folders by type or campaign.
- Apply templates in the contact drawer → Message tab.

2.8 Spend

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

Part 3 — Settings & Quick Reference

3.1 Settings

Profile	Edit your name, title, company, bio, avatar, LinkedIn URL, status, interest tags, and email address.
Access Rate	Set your suggested donation amount, charity, and delivery delays.
Charity	Search and select your nominated charity from 1.7M registered charities (AU, UK, US).
Giving Profile	Complete your giving profile to unlock Path A access.
Sample Data	Remove or restore the pre-loaded sample contacts. Click 'Remove sample data' when ready to use your own.

✦ NEW — Sample data for new users

- New accounts are automatically seeded with 5 sample contacts and a sample organisation.
- All sample records are tagged [Sample Data] in the notes field for easy identification.
- Remove sample data in Settings when you're ready to start with your own contacts.
- Restore sample data at any time from the same settings section.

3.2 Notifications

Kuerate sends email notifications for:

- New inbound message received
- Message accepted by a professional
- Message declined
- New thread reply
- Founding member confirmation

✦ *All notification emails are sent from hello@connect.kuerate.com. Add this to your safe sender list to ensure delivery.*

3.3 Import

Two ways to import contacts:

LinkedIn Import

- Export your LinkedIn connections from LinkedIn → Settings → Data Privacy → Get a copy of your data.
- Upload the connections.csv file at Dashboard → Import LinkedIn.
- Kuerate matches imported contacts to existing Kuerate users automatically.

CSV Import

- Click Import CSV in the CRM Contacts tab.
- Upload any CSV file — column names are detected automatically.
- Supports any format: First/Last, First Name/Last Name, etc.
- Duplicates (matched by email) are skipped automatically.

3.4 Shareable Links

◆ NEW — Public URLs for posts, events and jobs

- Every post has a unique URL: `app.kuerate.com/posts/[id]`
- Every event has a unique URL: `app.kuerate.com/events/[id]`
- Job posts have a unique URL: `app.kuerate.com/jobs/[id]`
- All public pages include Open Graph metadata for rich previews in Slack, iMessage, X, and LinkedIn.
- Non-logged-in visitors see full content plus a 'Join Kuerate' call to action.
- Private events return a 404 for visitors who are not invited.

3.5 Plans

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

3.6 Quick Reference

Keyboard shortcuts

Enter	Send message in thread composer.
Shift + Enter	New line in thread composer.

Key URLs

Your profile	<code>app.kuerate.com/[email-prefix]</code>
Dashboard	<code>app.kuerate.com/dashboard/feed</code>
CRM	<code>app.kuerate.com/dashboard/crm</code>

Messages	app.kuerate.com/dashboard/messages
Settings	app.kuerate.com/dashboard/settings
Pricing	app.kuerate.com/pricing
Help	kuerate.com/help

Status definitions

PENDING	Message delivered, awaiting action from professional.
ACCEPTED	Message accepted. Thread open.
DECLINED	Message declined.
DEFERRED	Marked for later review.
IN CONVERSATION	Active thread following acceptance.
MEETING BOOKED	Meeting or call confirmed.
CLOSED	Deal concluded.