Vellumica

GETTING STARTED GUIDE

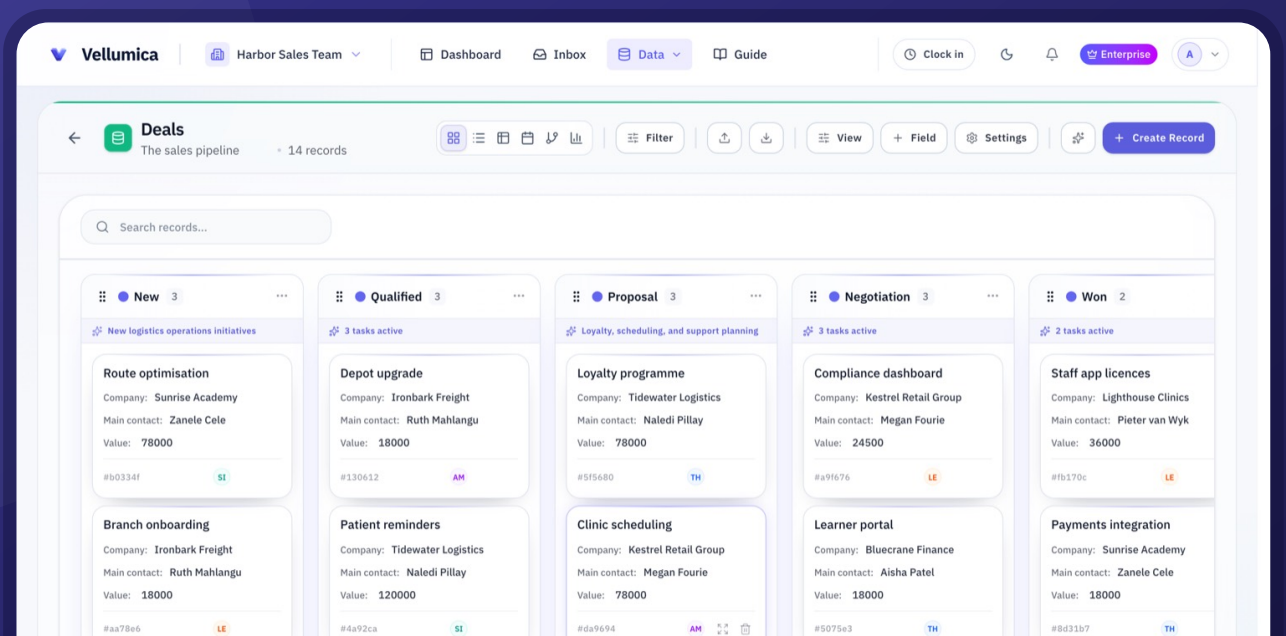
Build the system your team works in.

Create your own apps, connect them together, and run your team from one secure workspace. A complete guide for administrators and for everyone they invite.

Custom apps | Linked records | Boards & calendars | Analytics | Teams & security

vellumica.app

Guide version 1.0 | October 2026



WELCOME

What is Vellumica?

Vellumica is a no-code platform for building the apps your team actually works in. You describe the information you keep, and Vellumica turns it into forms, tables, boards, calendars and reports, all in one secure workspace.

Workspace
Your team's space, with its people, roles and settings

›

Apps
Collections of work, such as Companies, Contacts or Deals

›

Records
One item in an app, such as a single deal

›

Views
Table, list, board, calendar or analytics

How it fits together

A **workspace** holds your team and its apps. An **app** has fields you choose (text, numbers, dates, dropdowns, people, links to other apps and more). Each item you store is a **record**, and you can look at the same records as a table, a board, a calendar or a chart. **Relationships** connect apps to each other, so a deal knows its company and a company shows all of its contacts and deals.

Who this guide is for

Everyone in the team: activating your account, securing it with two-factor authentication, and working with records day to day.
People who build apps: creating apps, changing their stages and fields, and importing records.
Administrators and IT teams: adding people, choosing roles and access, helping people who are locked out, reviewing team activity, and connecting other systems.

> **Tip** The screenshots in this guide use a fictional sales team, so your own apps will look different. The steps are the same.

Find what you need

I have been invited
Start with **Activate your account** and **Two-factor authentication**, then **Work with records**, **Find your way around an app** and **Choose what you see**.

I look after the workspace
Go to **Add people**, **Roles and access**, **Two-factor authentication and passwords** and **Team activity**.

I want to build apps
See **Create an app**, **Change the stages** of an app, **Import records** and **Connect your data with relationships**.

Something is not working
See **Quick troubleshooting** near the end of the guide.

FEATURES

Everything Vellumica can do

A tour of the main capabilities. Some are used by everyone; others are for the people who build and manage the workspace.

Custom apps and fields
Create apps for anything you track, with fields for text, numbers, money, dates, dropdowns, files, ratings, people and more.

App relationships
Link apps together: a contact belongs to a company, a deal has a contact. See linked records inside each form.

Calculations and rollups
Totals, counts, averages and latest values taken from linked records, computed live.

Table, list, board and calendar
View the same records your way: drag cards between stages, plan by date, or scan a table.

Form layout builder
Arrange fields into sections and columns and hide what is not needed.

Workflow apps with stages
Pipelines with stages and cards for sales, hiring, requests and other step-by-step work.

Analytics and dashboards
Charts, tables and key figures from your data, shared as dashboards.

Automations
Rules that run when data changes: update fields, enrich records or call a webhook.

AI assistance
Suggestions and enrichment for records, apps created from a spreadsheet, and plain-language questions about your data.

Import and export
Import CSV or Excel files, export any view, and start from ready-made templates.

Integrations
Sync Google Sheets and files, use webhooks, and migrate records from Odoo with a guided import.

Comments, files and chat
Discuss records with @mentions, attach files, get notifications and use team chat.

People, roles and access
Invite people one by one or in bulk, set roles, restrict apps and control which records each person sees.

Security
Two-factor authentication, Google sign-in, and admin tools for passwords and lost phones.

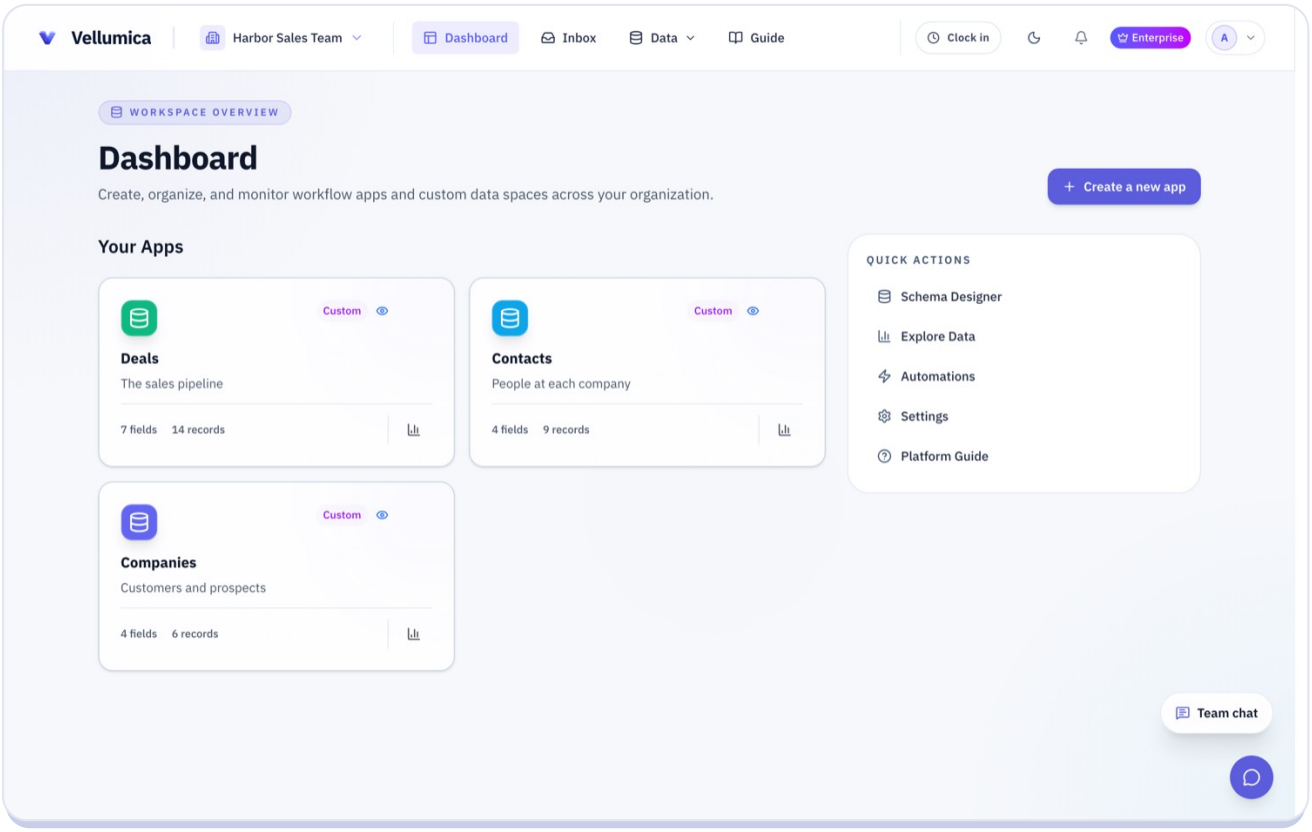
Attendance and team activity
Clock in and out, a live roster, and a team activity report with CSV export.

Your brand, your language
Add your logo and colours. Available in English, Spanish, French and Portuguese.

FIRST LOOK

Your workspace at a glance

After you sign in, the dashboard shows the apps in your workspace. Everything else is one click away in the top bar.



The dashboard lists your apps, with quick actions for administrators.

Dashboard

Your apps and quick actions. Open an app to work with its records.

Inbox

Mentions, assignments and notifications in one place.

Data

Jump to any app. Administrators also find the Schema Designer here.

Clock in

Start and stop your working day if your workspace uses attendance.

Team chat

Message the team without leaving Vellumica.

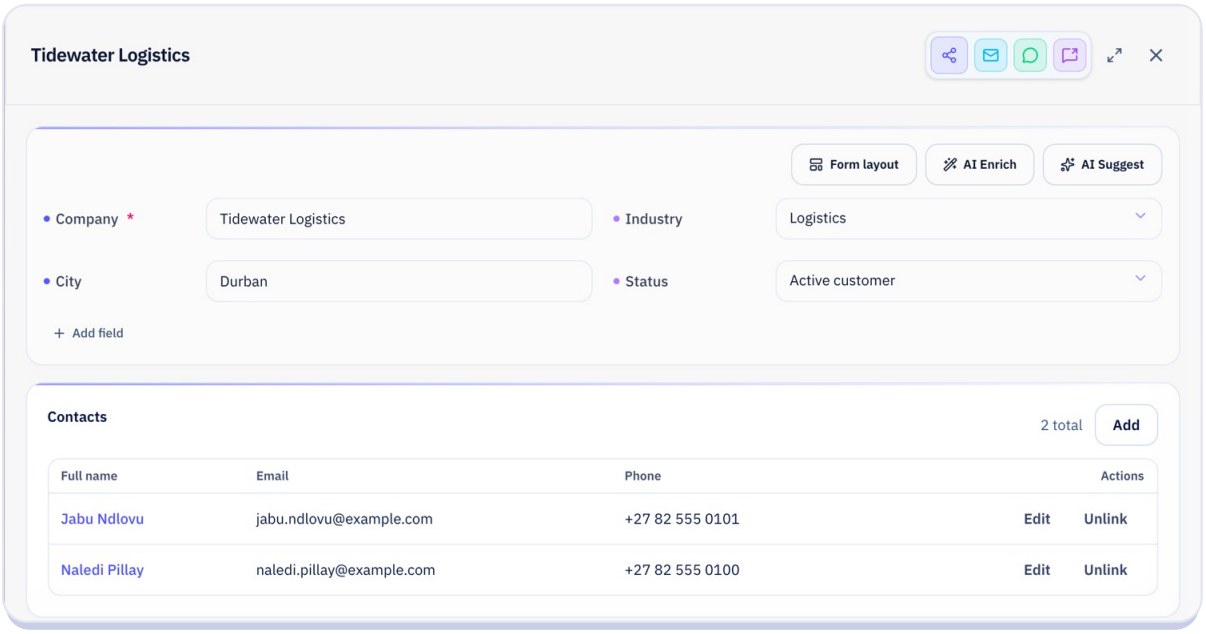
Your account

Open your settings to change your password and manage two-factor authentication.

CONNECT YOUR DATA

App relationships

Relationships are what turn separate lists into one connected system. Link an app to another, and each record can show, filter by and total up the records it is connected to.



A company record shows its linked Contacts (and Deals), each one clickable, editable and unlinkable.

How to create a relationship

1. Open the app that should **hold the link**, for example Contacts, and choose **Field**.
2. Choose the field type **Relation**, pick the app to link to (Companies), and choose which field to display (the company name).
3. In **Show on Companies as**, type a name such as "Contacts". The other app now lists its linked records automatically.
4. Choose the **link type**: many-to-one (the default), one-to-one, or many-to-many. You can change it later.
5. Choose what happens when a linked record is deleted: block the delete, delete the linked records too, or keep them and clear the link.

Link types in plain words

Many-to-one

Many contacts belong to one company. This is the default and the most common choice.

One-to-one

Each company can be linked from only one record, such as a single primary account manager.

Many-to-many

A contact can belong to several companies, and a company can have many contacts.

CONNECT YOUR DATA

Working with linked records

See everything in context

Open a company to see its contacts and deals in tables inside the form. Click a name to open that record.

Add or link in one step

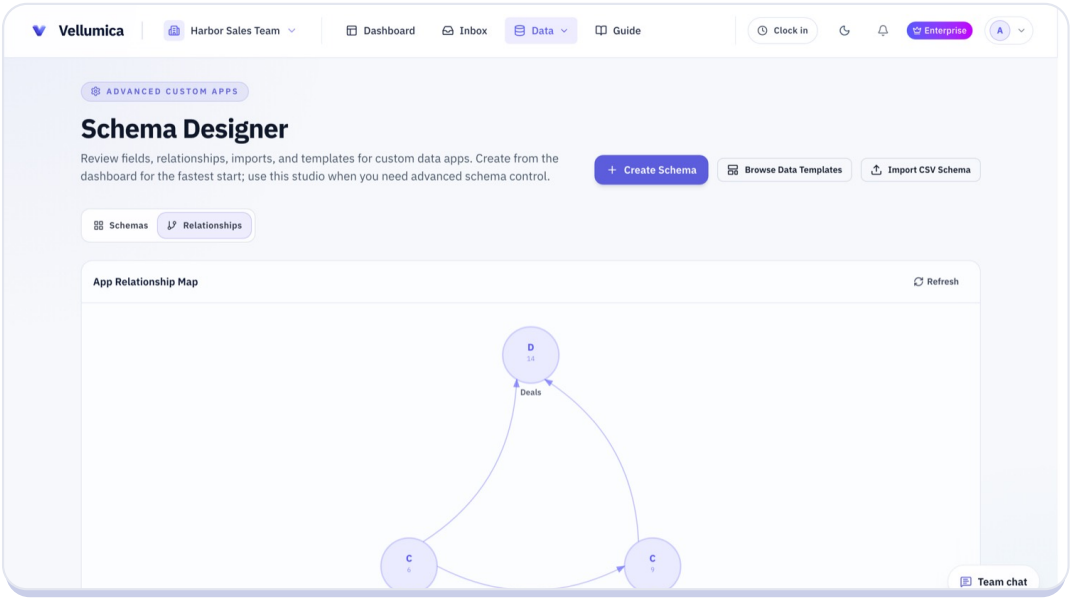
Use **Add** to link an existing record or create a new one with the link already filled in.

Totals from linked records

Add a **Calculation** field to count deals, sum their value or find the latest date, computed live from the linked records.

Fewer duplicates

Choose fields that must be unique, or a combination that cannot repeat, so the same record is never entered twice.



The relationship map shows how your apps connect. Find it in Schema Designer under Relationships.

Good to know Linked records appear on cards and in tables too, so a board of deals can show the company and the main contact on every card.

EVERYDAY WORK

Work with records

Open an app from the dashboard and switch between views with the icons at the top. The exact fields and actions depend on how your workspace is set up and on your permissions.

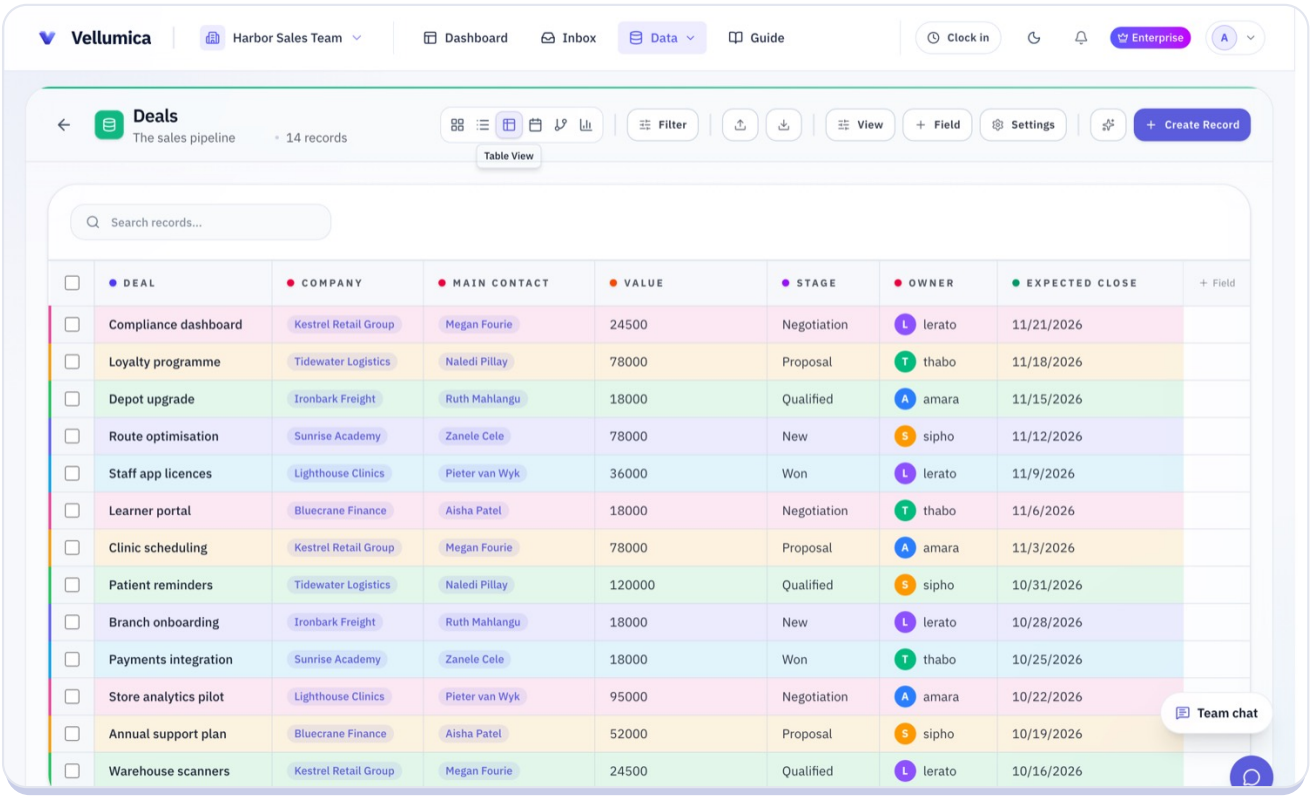


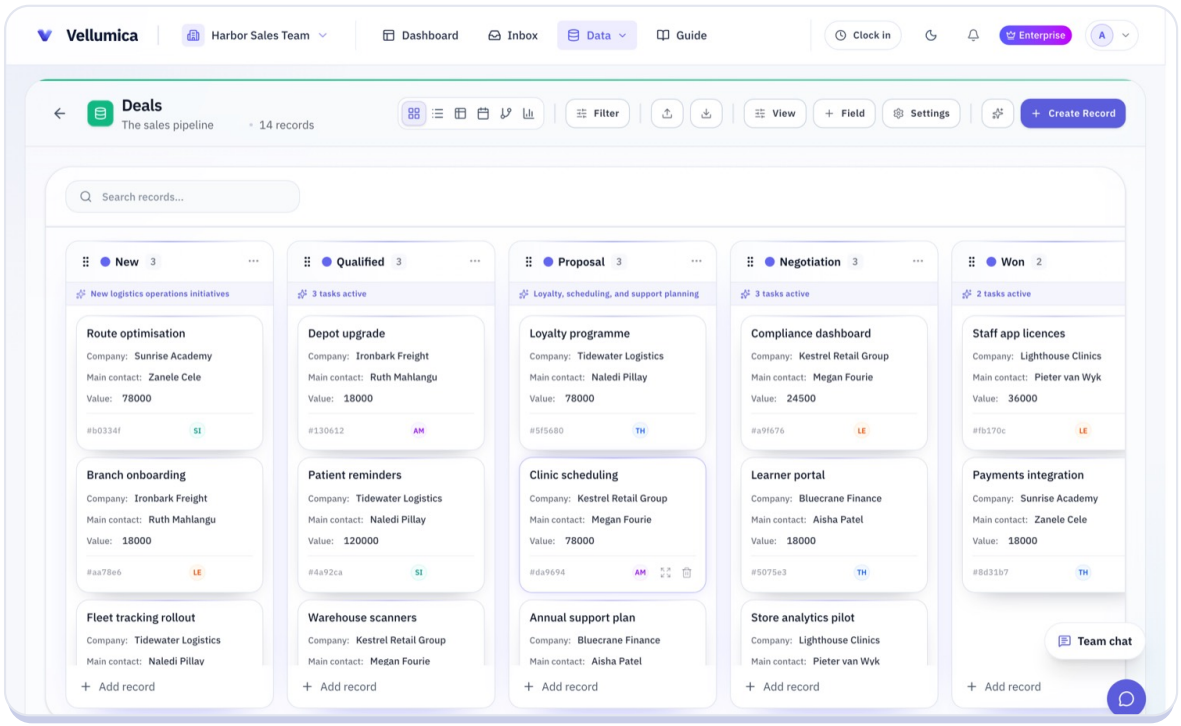
Table view: scan, sort and edit records, with linked records shown as chips.

A simple routine

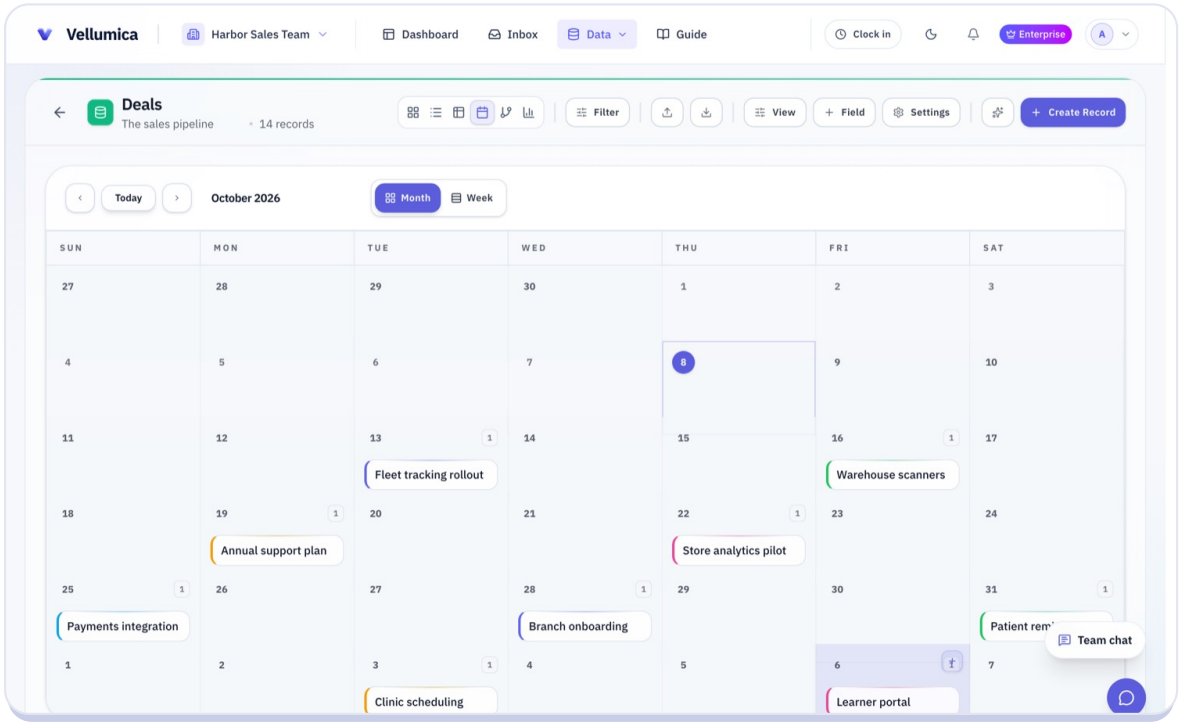
1. Open the app, then use search to find an existing record before creating a new one. Clear filters if an expected record is missing.
2. Open the record, confirm it is the right one, and update the fields you need, completing any required ones.
3. Choose **Save** or **Save changes** and wait for the confirmation. For inline edits in a table, check the new value is still there afterwards.
4. Check the status and responsible person before moving on, where those fields exist.

EVERYDAY WORK

Boards and calendars



Board view: drag a card to another column to change its stage.



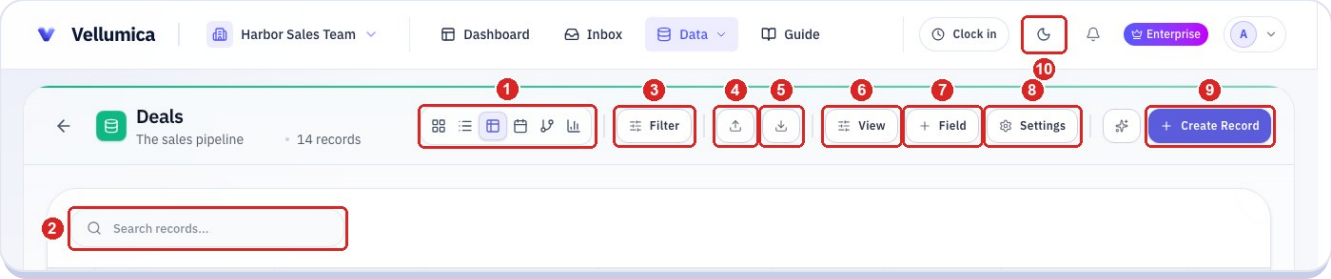
Calendar view: records with a date appear on that day; switch between month and week.

> **Tip** The first time you open a board or calendar, choose **Auto-configure** and Vellumica picks sensible fields. You can fine-tune them any time from **View**.

EVERYDAY WORK

Find your way around an app

Every app has the same toolbar along the top. Workflow apps and Custom Data apps share almost all of it. Hover over an icon to see its name.



The toolbar of a Custom Data app in Table view. A Workflow app looks the same, with New Card in place of Create Record.

1. **View icons.** Switch between Board, List, Table, Calendar, a map of how apps link, and Analytics. They all show the same records.
2. **Search.** Type to find records.
3. **Filter.** Opens a row of filters such as Assignee, Priority, Date range and Has attachments. Choose **+ Filter** to add more.
4. **Import.** Add records from a spreadsheet.
5. **Export.** Download the records as a file. Owners and admins have this by default.
6. **View.** Choose which fields show, and in what order.
7. **Field.** Add a new field to the app.
8. **Settings.** The app's name, fields and, in a Workflow app, its stages.
9. **Create Record.** Add a new record. In a Workflow app this is **New Card**.
10. **Dark mode.** In the top bar. Switch between light and dark.

Greyed-out buttons A button is greyed out when your role does not allow it, for example Import, Field, Settings or Export. Ask an administrator if you need one of them.

Text too big, or part of the page cut off? Zoom the browser out a little: **Ctrl** and minus on Windows, **Cmd** and minus on a Mac. Table view also scrolls sideways, which the next page explains.

EVERYDAY WORK

Choose what you see

An app with many fields cannot show every column at once. You can scroll to the rest, and you can choose which fields appear and in what order.

See every column: use Table view

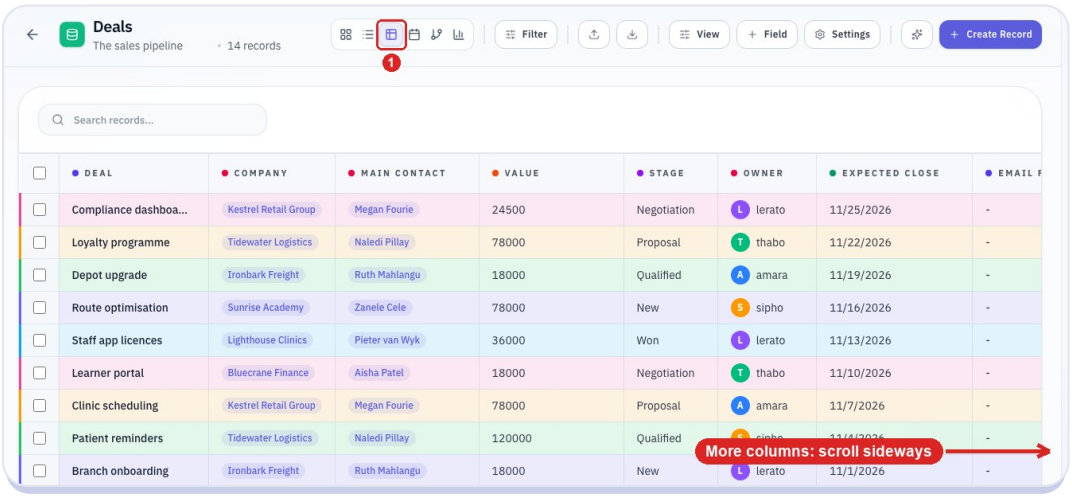
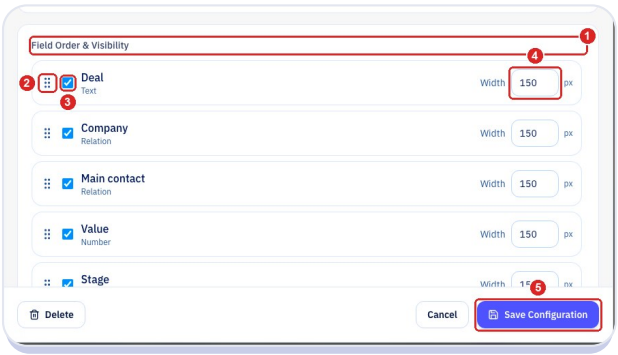


Table view. Columns that do not fit are reached by scrolling sideways.

1. Click the **Table** icon in the toolbar.
2. Scroll sideways to reach the rest: swipe left or right on a trackpad, hold **Shift** while turning the mouse wheel, or drag the scroll bar along the bottom of the table.

Choose which fields show: View



1. **Field Order & Visibility** lists every field in the app.
2. Drag the dotted handle to move a field earlier or later.
3. Tick a field to show it. Untick it to hide it.
4. **Width** sets how wide the column is, in pixels.
5. Choose **Save Configuration** to keep your choices.

Click **View** in the toolbar to open this. The dialog is named after the view you are in, such as Customize Table View, and your choices apply to that view. Hiding a field only hides the column. The data stays and you can show it again.

Before you change it A saved layout is stored with the app, not just on your screen. The first layout saved for a view becomes the starting layout other people see, so agree changes with your team first. At the moment, changes made after someone else has saved a layout may apply only on the computer you made them on.

FOR EVERYONE

Activate your account

1. Open the latest invitation sent to your email. A resent invitation replaces the previous link. Check your junk or spam folder if needed.
2. Follow the invitation link and the sign-in prompts. Use the email address that received the invitation. If you already have an account, sign in with that account.
3. Follow any email-verification prompts. After signing in, the invitation page accepts your invitation automatically. Continue to the dashboard and select the correct workspace. Avoid creating a separate workspace for the team.
4. Set up two-factor authentication if you are prompted or your administrator asks for it. See the next page.
5. Open the dashboard and check that you can see the apps you need. Report missing access to your administrator.

Invitation problems

No invitation: check spam, confirm the email address with your administrator, and request a resend.
Expired or invalid link: request a new invitation.
Wrong account opens: check the signed-in email before accepting the invitation.

If an administrator sets your password

You will be given a temporary password. After you sign in, you will be asked to choose your own password before continuing.

> **Keep it private** Use your own account. Do not share your password, authenticator codes or recovery codes, and sign out when using a shared computer.

FOR EVERYONE

Set up two-factor authentication

Two-factor authentication (2FA) adds a verification code to your sign-in. It is optional unless your administrator requires it, but recommended.



Find it in your account settings, under Security.

1. Open your account settings, go to the Security section and choose **Enable Two-Factor Authentication**.
2. In an authenticator app on your phone (such as Google Authenticator), add an account and scan the QR code. If scanning is not possible, use **Can't scan? Enter manually**.
3. Enter the current 6-digit code in Vellumica and choose **Confirm and enable**.
4. Save your recovery codes somewhere private. Each code works once and will not be shown again.
5. At future sign-ins, enter the current code from the app. This applies to every sign-in method, including Google.

If a code does not work or you lost your phone

Wait for a fresh code and check that your phone uses automatic date and time. If you have lost access to the app, use an unused recovery code, or ask your administrator to turn 2FA off for you. You can then sign in with just your password and set it up again.

Turning 2FA off yourself

In account settings, under Two-Factor Authentication, choose **Disable** and enter your password. This is not available while your administrator requires 2FA for you.

FOR EVERYONE

Quick troubleshooting

App or record missing
Check the workspace, clear search and filters, then ask an administrator to check your access.

Cannot edit
Your role or the app's permissions may restrict the action. Ask an administrator.

Cannot sign in or lost your phone
Ask an administrator to turn 2FA off or set a new password for you. Administrators: see the 2FA page in this guide.

Save fails
Read the message, correct the highlighted fields and retry once.

Something looks wrong
Avoid repeated edits or deleting data to work around it. Report the issue.

Cannot see all the columns
Switch to **Table** view and scroll sideways, or use **View** to choose which fields show. See **Choose what you see**.

Part of the screen is cut off
Zoom the browser out a little (**Ctrl** or **Cmd** and minus). If it keeps happening, tell your administrator your screen size and browser.

A page says admins only
Some pages, such as team activity and live attendance, are for administrators. Ask one if you need a report.

What to include when asking for help

The app name, record reference, approximate time, what you were trying to do, and the exact error message. Include a screenshot if useful, hiding confidential information and all sign-in codes.

Still stuck?

Ask your administrator first. If they cannot resolve it, they can reach Vellumica support using the details below.

NEED HELP?

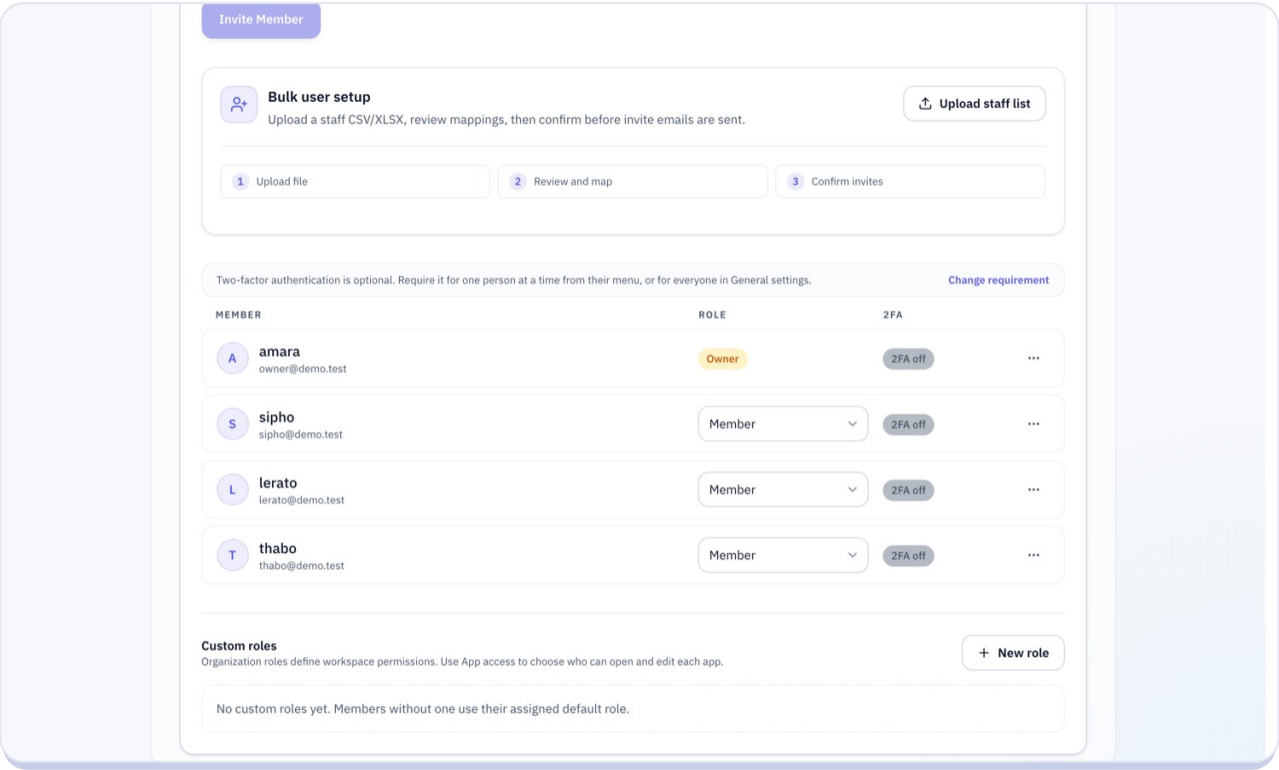
Contact Vellumica support

Email **hello@vellumica.app**
Web **vellumica.app**

FOR ADMINISTRATORS

Add people to the workspace

1. Sign in with an administrator account and select the correct workspace.
2. Open **Settings** → **Organization** → **Members**.
3. To add one person, type their email address and choose **Invite Member**. They receive an invitation email, and a **Copy Link** option is shown after sending in case the email is slow.
4. To add many people, use **Bulk user setup**. Upload the staff list (CSV or XLSX), match its columns to Name and Email, map each role in the file to a Vellumica role, choose app access for each group, then review and choose **Confirm and send invites**.
5. Watch the Members list as people accept. If someone has not received their email, send a new invitation; it replaces the old link.



Members: invite people, set each role, and see 2FA status at a glance. The three-dot (…) menu holds the account tools.

> **Good to know** Existing members receive no email during a bulk import, and pending invitations are skipped. The import runs in the background, so it is safe to reload the page.

If you see "Member limit reached"

Your plan's included members have been used. Open **Settings** → **Organization** → **Plan & usage** to review and upgrade the plan. Depending on the plan, extra members may instead be allowed and billed as overage; the Members page shows which applies.

FOR ADMINISTRATORS

Roles, app access and visibility

Three decisions, made separately

Role or custom profile
What a person can do in the organization: manage members, create apps, change schemas, integrations and billing. A custom profile replaces the default role.

App access
Which apps a person can open. An app is open to everyone or restricted to selected people, who get Viewer or Editor access.

Record visibility and assignment
Whether members see every record in the apps they can open, or only the records assigned to them.

Default roles are broader than job titles

Owner: every default capability, plus ownership controls.
Admin: every default capability except billing. The owner can also let individual admins manage billing.
Member: organization access, app creation and editing, schema editing and analytics.
Viewer: organization access and analytics. A restricted-app grant can separately allow app editing, so check both settings.

Job titles such as Manager or Analyst are not permission levels. Agree the actual duties, and use a custom profile where the default roles are too broad. People with organization management capability can open restricted apps, so restricting an app does not hide it from them.

Before assigning live work Agree the role, grant the required app access, check the record visibility policy, then assign a small batch and ask a member to confirm the result from their own account. Do not give Admin merely to make an app visible.

FOR ADMINISTRATORS

Assign work to people

Access decides which apps and actions a person can use. Assignment names who is responsible for a record or queue. Being assigned work does not grant every permission, so give app access first.

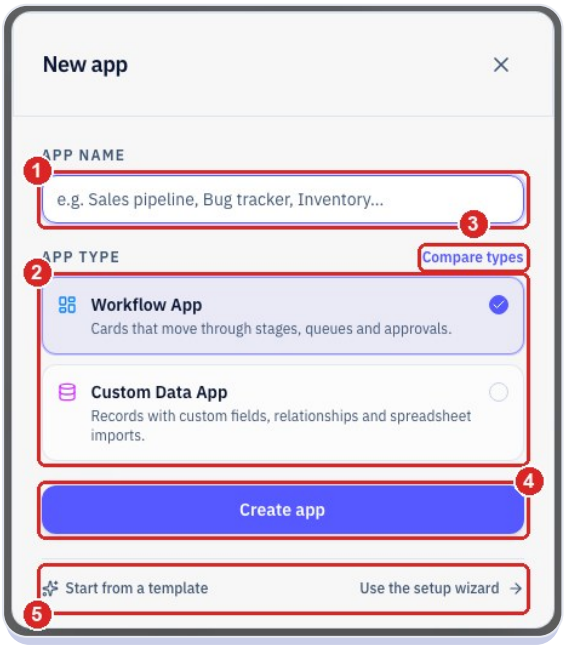
1. Confirm the intended apps, role and responsibilities with each manager, and give each member the agreed app access.
2. For a custom app, confirm that its **User Assignment** field represents the intended responsibility. If the app has several user fields, check which one is the target.
3. In the table or list, select a small, agreed set of records. Where available, choose **Set assignee** and **Choose member**, and review the selection before applying it.
4. Bulk assignment replaces existing assignees. Check the result, then ask the member to open the app and confirm that they can see and work on the intended records.

> **If an assignment needs a decision** Record the app, the person who decides and the follow-up action, rather than assigning work by assumption.

FOR APP BUILDERS

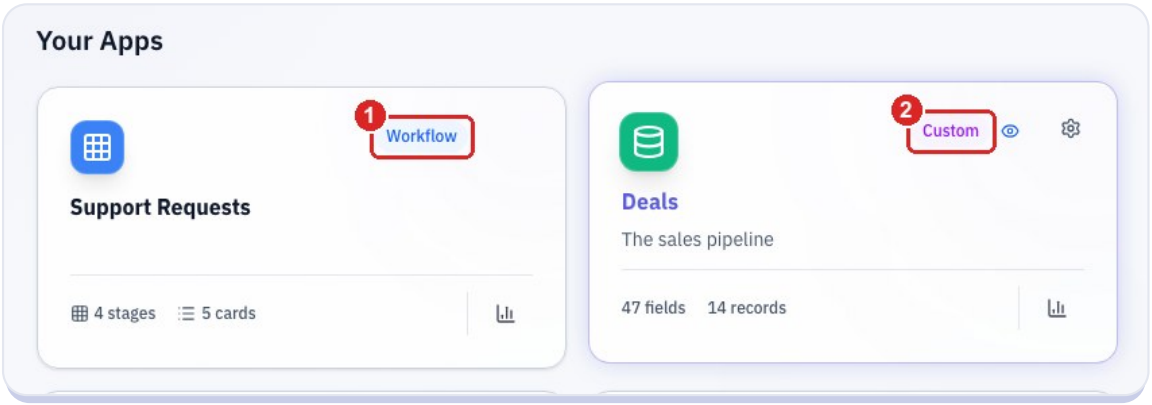
Create an app

An app is where a team keeps its records. You create one from the dashboard and choose its type.



1. Name your app, for example *Sales pipeline* or *Call dispositions*.
2. Choose the type. A **Workflow app** moves cards through stages, such as queues, approvals and follow-ups. A **Custom Data app** stores records with fields, relationships and spreadsheet imports.
3. Not sure which? Choose **Compare types**.
4. Choose **Create app**.
5. Or start from a ready-made template, or use the setup wizard for guided setup.

How to tell which type an app is



*Every app card on the dashboard is tagged **Workflow** or **Custom**.*

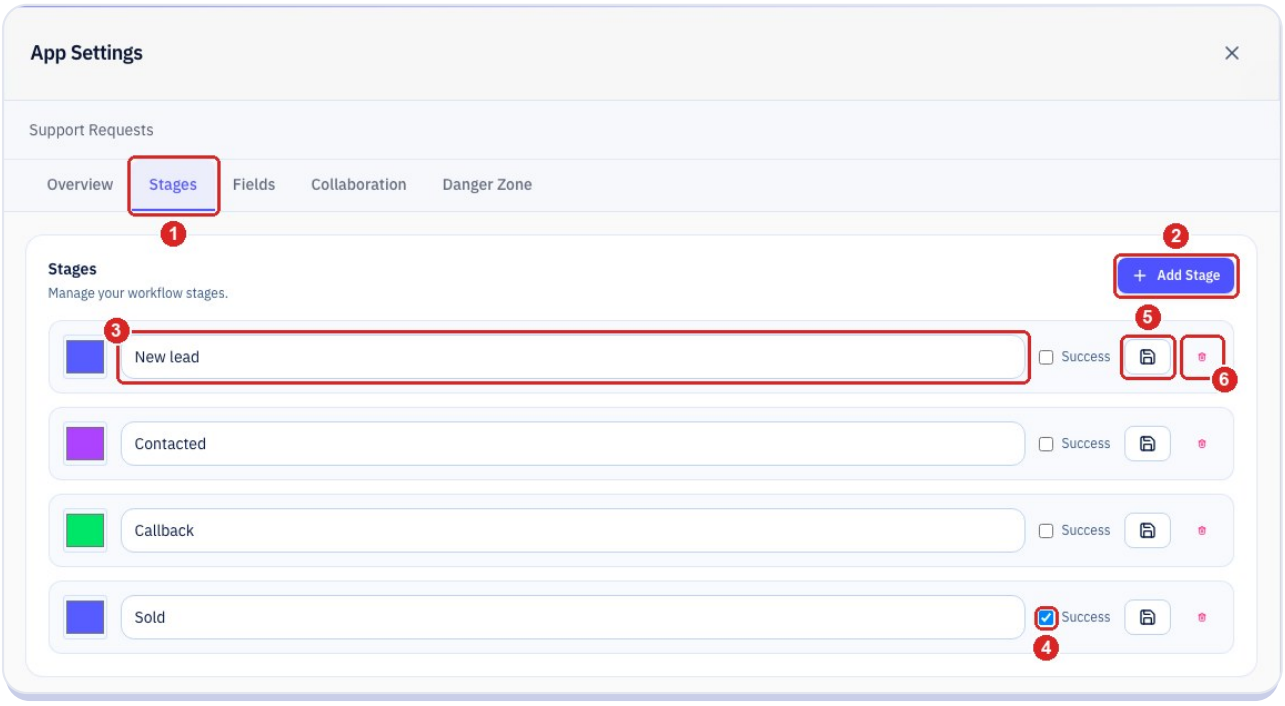
Why it matters Stages are set up differently in each type. In a Workflow app they live in **Settings → Stages**. In a Custom Data app they are the options of a dropdown field. The next pages cover both.

Who can do this Owners, admins and members can create apps by default. Viewers cannot.

FOR APP BUILDERS

Change the stages of a Workflow app

Stages are the columns on a Workflow app's board, the steps a card moves through. You can add, rename, recolour, reorder and remove them.



Settings → Stages in a Workflow app.

1. Open the app, choose **Settings**, then the **Stages** tab.
2. **Add Stage** adds a new row at the bottom.
3. Type the stage name. Click the colour square to change its colour.
4. Tick **Success** on a stage that means a win. Vellumica celebrates with confetti when a card moves there.
5. Click the **save icon** on the row after every change, including a new stage. A “Stage updated” message confirms a change and “Stage created” confirms a new stage.
6. The **bin icon** deletes the stage. See the next page before you use it.

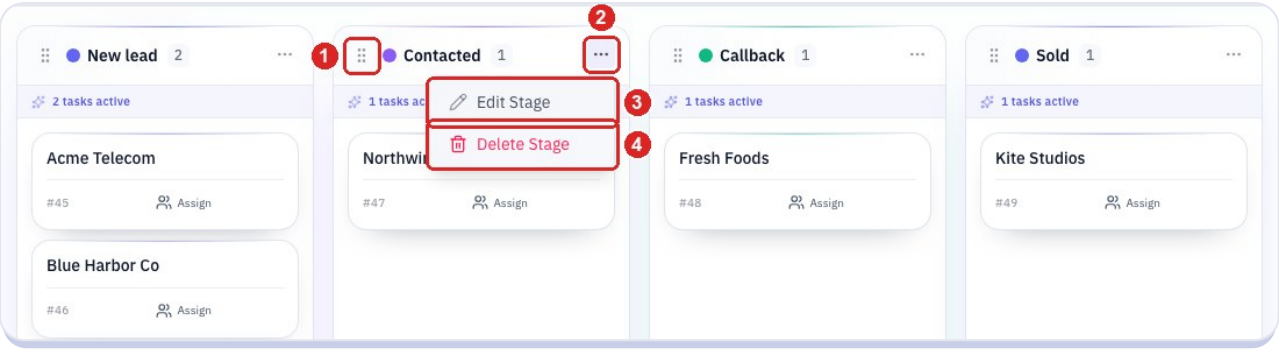
Save each row A change is not kept until you click the save icon on its row. A stage you add with **Add Stage** disappears if you close the window before saving it.

Who can do this Owners, admins and members can edit a Workflow app's stages by default, if they can edit that app. Viewers cannot.

FOR APP BUILDERS

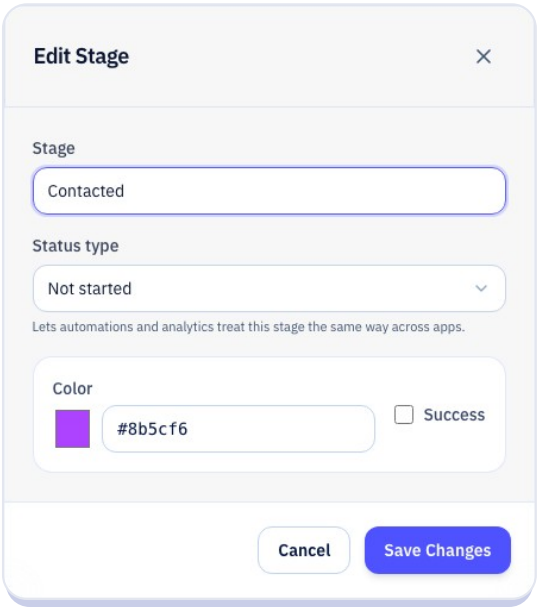
Reorder, rename or delete a stage

You can also work on stages straight from the board.



Each stage on the board has a handle and a three-dot (…) menu.

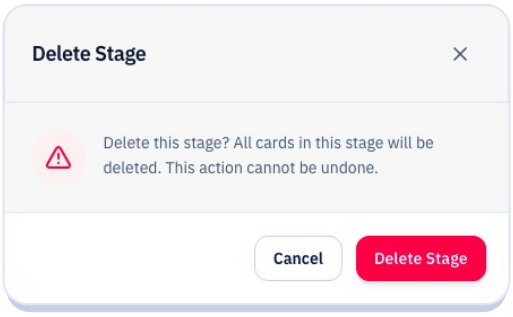
1. Drag the handle to move a stage left or right.
2. Open the three-dot (…) menu.
3. **Edit Stage** opens a window to change the stage.
4. **Delete Stage** removes the stage.



Edit Stage

Change the **name** and **colour**, and tick **Success** for a winning stage. **Status type** (Backlog, Not started, Active, Done or Cancelled) lets automations and analytics treat the stage the same way across apps. Choose **Save Changes** when you are done.

Delete Stage



Deleting a stage Deleting a stage deletes every card in it, and it cannot be undone. To keep the cards, drag them to another stage first.

FOR APP BUILDERS

Change stages in a Custom Data app

In a Custom Data app, your stages, dispositions, statuses or categories are the options of a **dropdown field**. You change them by editing that field.

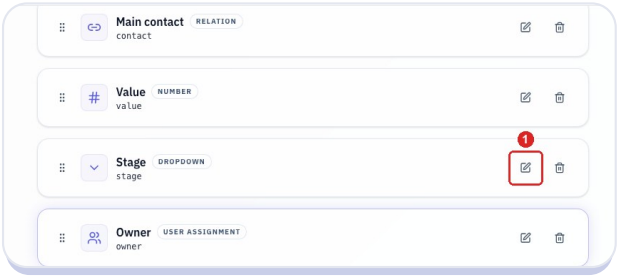
> **Find the right field** Look for the field that holds your stages, for example *Stage* or *Disposition*. Its type tag says **DROPDOWN**.

1. Open the app and choose **Settings** in the toolbar, then the **Fields** tab.
2. Choose **Edit fields**. This opens the page that lists every field in the app.



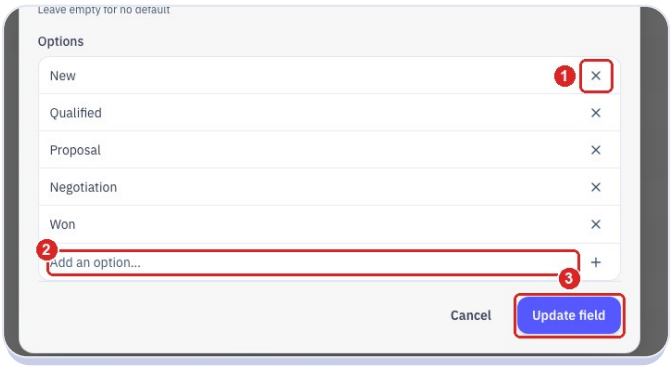
Settings → Fields → Edit fields.

3. Click the pencil next to the dropdown field.



The pencil edits the field and its options.

4. Scroll down to **Options**, make your changes, then choose **Update field**.



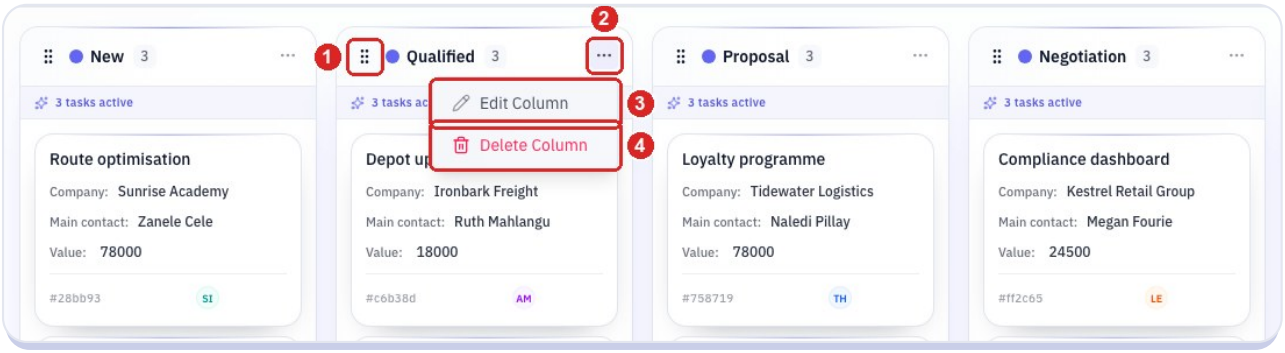
1. Click the **×** next to an option to remove it.
2. To add one, type it in **Add an option…** and press **+**.
3. Choose **Update field** to save.

> **Before you remove** Before you remove an option, check that no records still use it.

FOR APP BUILDERS

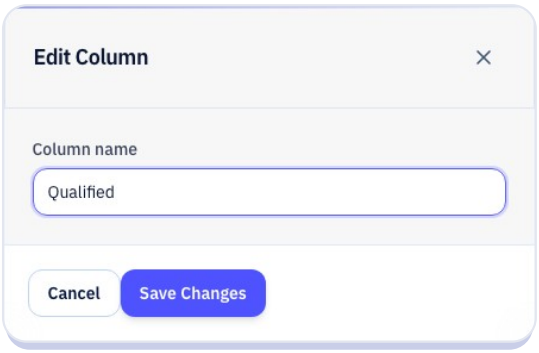
Reorder, rename or delete a column

Board view shows one column for each option of your stage field. The first time you open it, choose **Auto-configure Board**.



Each column has a handle and a three-dot (…) menu.

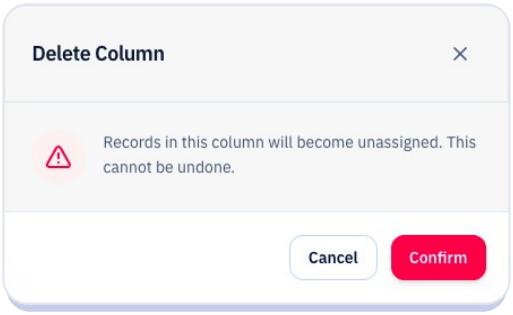
1. Drag the handle to reorder the columns.
2. Open the three-dot (…) menu.
3. **Edit Column** renames the option. Records that used the old name move to the new one.
4. **Delete Column** removes the option.



Edit Column

Type the new name and choose **Save Changes**.

Delete Column



Deleting a column Deleting a column does not delete its records. They become unassigned, and this cannot be undone. If the field is required, a column that still has records cannot be deleted: move them to another column first.

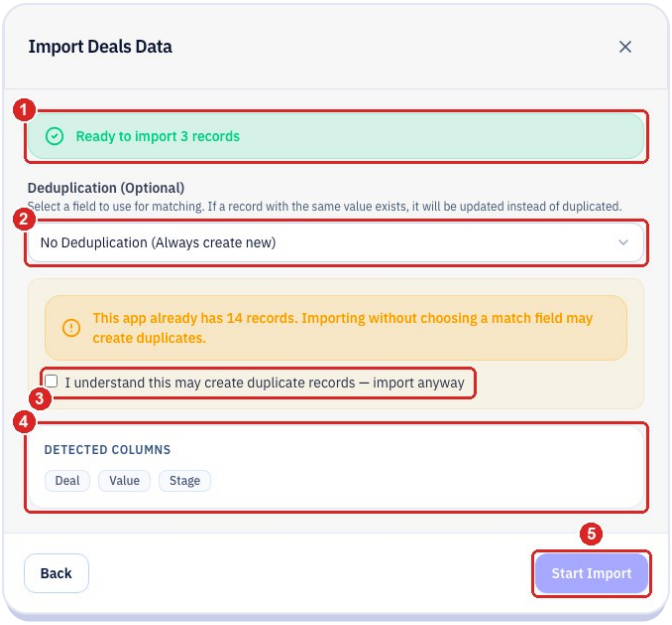
Who can do this Owners, admins and members can change a Custom Data app's fields and options by default. Viewers cannot.

FOR APP BUILDERS

Import records from a spreadsheet

Add many records at once from a CSV or Excel file (.csv, .xlsx or .xls, up to 10 MB). Open a Custom Data app and use the **Import** icon in the toolbar.

1. Put your field names in the first row of the file. Column headings are matched to the app's fields, so a column called *Deal* fills the *Deal* field.
2. Click the **Import** icon, then drop the file on the box or click it to choose a file.



1. The green banner shows how many records were found (at most 10,000: any rows after that are ignored). Check it is the number you expect.
2. **Deduplication**: choose a field to match on, such as an ID or email. A record with the same value is updated instead of duplicated.
3. If the app already has records and you choose no match field, tick this box to confirm you want new records even if they already exist.
4. **Detected columns** lists the headings found in your file.
5. **Start Import** stays greyed out until you choose a match field or tick the box.

Tip Try a small file of a few rows first and check the records look right before importing thousands. Only the first 10,000 rows of a file are read and the rest are ignored without a warning, so split a bigger file into several.

Getting data out The **Export** icon next to Import downloads the records as a file. Owners and admins can export by default.

Who can do this Owners, admins and members can import by default.

FOR ADMINISTRATORS

Two-factor authentication and passwords

Each person sets up 2FA on their own account. Administrators decide whether it is required and can help when someone is locked out. The controls are in Settings → Organization.

Who has to set up 2FA

Everyone (General tab)
Tick **Require two-factor authentication** and save. Anyone without 2FA is limited to view-only until they set it up, including you. When it is unticked, nobody is forced.

One person at a time (Members tab)
Open the **…** menu next to a name and choose **Require 2FA**, so you can introduce it gradually.

Exempt (Members tab)
Shown only while the requirement for everyone is on. It excuses one person and does not turn off a 2FA they already use.

Unticking the setting

Unticking **Require two-factor authentication** removes the requirement. It does not switch off 2FA for people who already enabled it: they are still asked for a code at every sign-in, including Google. They can turn it off in their own settings, or you can turn it off for them. This is deliberate, so that no administrator can weaken a person's own account security with a single checkbox.

What the Members page shows

2FA on: set up. **Setup required:** required, not yet set up. **Exempt:** excused from the requirement for everyone. **2FA off:** not required and not set up.

Help someone who is locked out

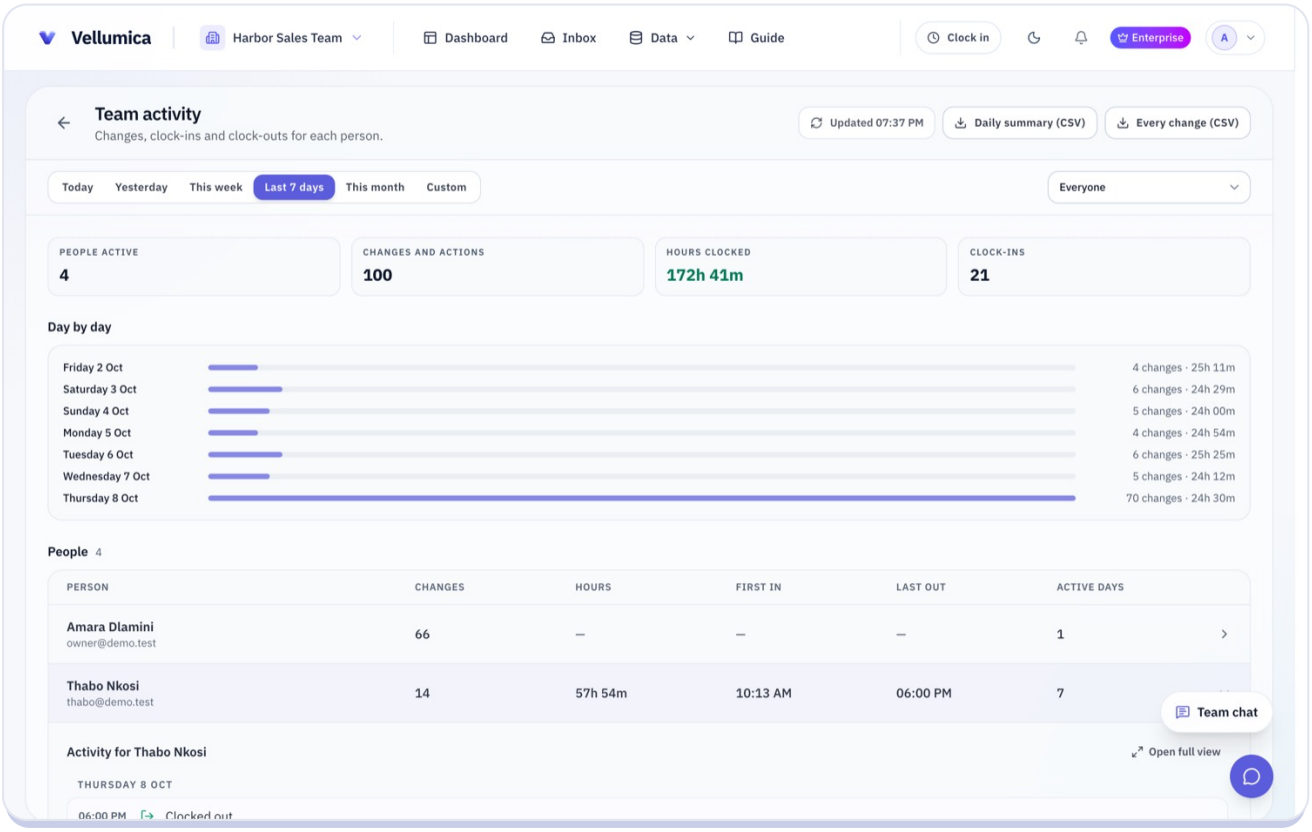
1. **Lost or replaced phone:** Members → **…** → **Turn 2FA off**, then confirm. The person signs in with just their password. If 2FA is required for them, they are asked to set it up again.
2. **Forgotten password:** Members → **…** → **Set password**. Use **Generate**, then **Copy**, and share it securely. The person chooses their own password after signing in.

> **If a menu option is missing** You cannot change your own account or the owner's account here, and only the owner can change an administrator's account. For people who also belong to other workspaces, ask them to use **Forgot password**. To manage your own 2FA, open the … menu on your own row.

FOR ADMINISTRATORS

Team activity

See, for each person, what they changed and when they clocked in and out, by day, week or month, and export it. Open it from Settings → Organization → Members and choose Team activity.



Choose a period and person, read the summary, and click a name to see their day in place.

Choose the period

Today, Yesterday, This week, Last 7 days, This month or Custom (up to 93 days), for everyone or one person.

Read the summary

People active, changes, hours clocked and clock-ins, a day-by-day chart, and a table of first in, last out and active days.

See one person's day

Click a row to open their clock-ins, clock-outs and changes in time order. Choose Open full view for a larger window.

Export

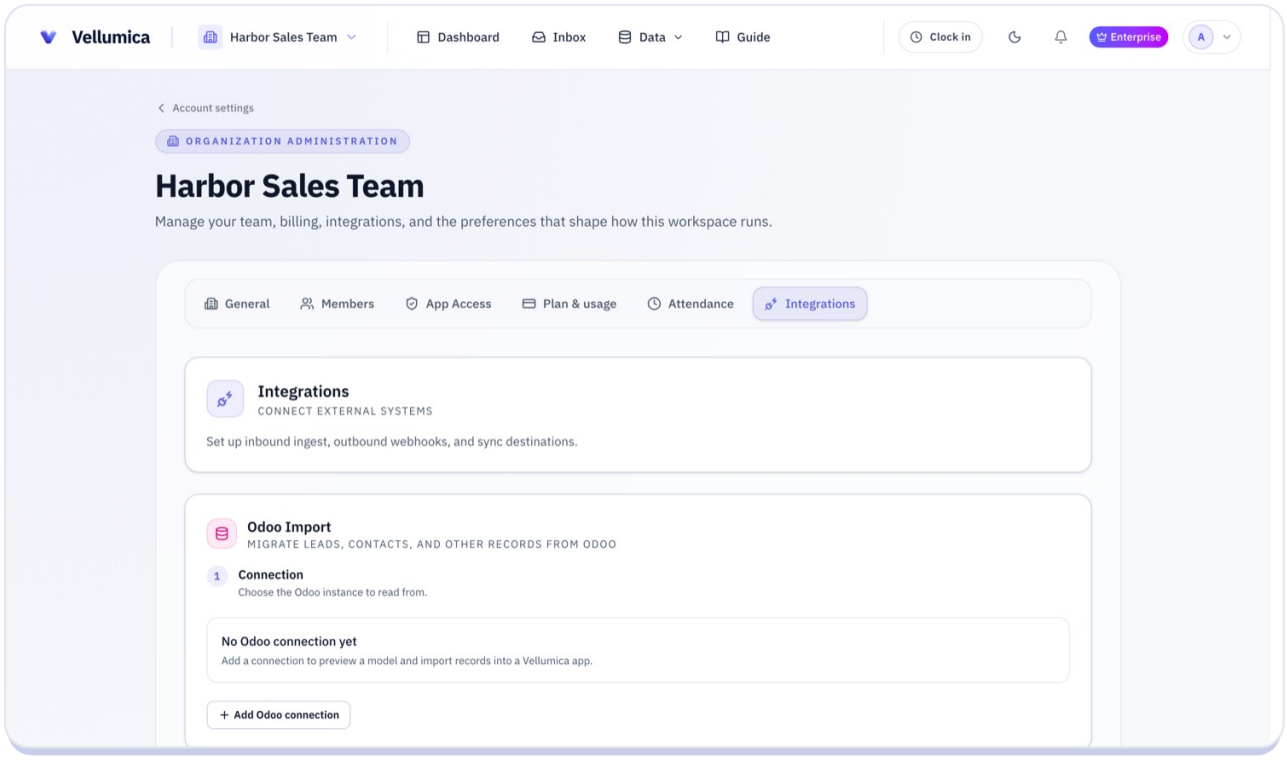
Daily summary (CSV) or Every change (CSV), for the period and person you selected.

Good to know The page refreshes itself about every 30 seconds while it is open. On screen, times follow your computer's time zone; exported files use the system's time zone.

FOR ADMINISTRATORS

Connect other systems

Open Settings → Organization → Integrations to bring data in, keep it in sync or send it out. Only people who can manage integrations see the controls.



Integrations: connect an Odoo instance, sync Google Sheets and files, and set up webhooks.

Odoo import

Connect an Odoo instance, preview a model and import its records into a Vellumica app. Afterwards, review people from Odoo who are not Vellumica users yet and match them to members.

Google Sheets and files

Keep a sheet or file in step with an app, in either direction.

Webhooks

Receive data from other tools, or notify them when records change.

Import and export

Import CSV or Excel files into any app, and export any view to CSV.

NEED HELP?

Contact Vellumica support

Email **hello@vellumica.app**
Web **vellumica.app**

When you get in touch, include your workspace name, what you were trying to do, the exact message you saw and, if useful, a screenshot with any sign-in codes hidden.