Opti Edge — Getting Started Guide

A step-by-step walkthrough of integrations, automation and workflow setup. Follow it top to bottom — most teams are live in under 30 minutes.

1 Create your account

~3 min

- ✓ Click **Get started** in the top-right corner and enter your email and a password.
- ✓ Check your inbox and confirm your account, then log in.
- ✓ Every new account starts on a **14-day free trial** — no card required upfront.

Tip: Use your company email so teammates can recognise who owns the workspace.

2 Choose your primary focus

~1 min

- ✓ Right after your first login, Opti Edge asks what your business does: **Real Estate (Proptech)** or **B2B SaaS**.
- ✓ Pick the one that matches you — we instantly provision **two ready-made workflows** for that industry, so you start with working automations instead of a blank canvas.

Tip: This choice sets your blueprint library. You can still build anything later.

3 Explore your blueprints

~5 min

- ✓ Your home screen lists pre-built blueprints: lead capture with agent routing, agreement and payment flows, listing price monitoring, invoice syncing and deal approvals.
- ✓ Each card shows its step chain — trigger, AI scoring, alerts and database updates — so you can see exactly what it does before opening it.
- ✓ Open a blueprint to launch it straight into the Canvas, ready to customise.

4 Connect your integrations

~10 min

- ✓ Open the **Integrations** page. The first thing you'll see is your agency's unique **Inbound Lead Webhook URL** — copy it with one click.
- ✓ Paste that URL into your Facebook Lead Ads forms, Elementor website forms or property listing forms. Every new lead lands directly in your Opti Edge pipeline.
- ✓ Under **WhatsApp Business API**, enter your WhatsApp Phone Number ID, your Meta System User access token (kept masked and never shown again) and your WhatsApp Business Account ID, then switch on **Instant WhatsApp Agent Routing** and click **Save WhatsApp Credentials**.
- ✓ Slack, Google Workspace and HubSpot cards are listed for planning — they connect as those integrations are rolled out.

Tip: Lost a token? Re-enter it and save — credentials update in place.

5 Build a workflow in the Canvas

~10 min

- ✓ Go to **Canvas**. The left palette groups every building block: **Triggers** (webhook, form submission, payment received, schedule), **Logic & AI Rules** (IF/Else, AI scoring, filters, approvals) and **Actions** (WhatsApp, email, Slack, database updates, PDF contracts, outgoing webhooks).
- ✓ Click blocks in order — trigger first — to place them on the canvas.
- ✓ Click any placed block to open its configuration panel: rename the step and fill in its fields (secrets are masked automatically), then hit **Save**.
- ✓ Name your workflow at the top and click **Save Workflow**. Everything you build is stored to your account.

Tip: Remove a block with the trash icon on its card.

6 Test run before you go live

~2 min

- ✓ Click **Test Run Workflow**. Opti Edge checks each step's configuration in sequence — **no external actions are sent**, so nothing emails or messages a real customer during a test.
- ✓ Passed steps light up green. If something is wrong, the failing block turns red with a message telling you exactly what to fix.
- ✓ Every test result is saved to your **Execution Logs**.

7 Monitor Execution Logs

~2 min

- ✓ The **Execution logs** page lists every run with its run ID, workflow, trigger source, status, timestamp and duration.
- ✓ Click any run to open the full JSON payload plus the exact error when a run failed — perfect for debugging a step.

8 Manage your plan

~2 min

- ✓ Click the **crown icon** in the header (or open **Settings** → **Billing**) to see plan tiers and prices in Naira.
- ✓ Your 14-day trial status is shown there; upgrade whenever you're ready.

Need a hand?

Our team helps with WhatsApp token setup, webhook routing and blueprint customisation.

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