BUSINESS & ENTERPRISE

Your simple Business guide

From first login to your first trip report.

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01 Sign in and set up your team

02 Connect your existing CRM

03 Record visits, times and kilometres

04 Download or email your Excel report

For people on the road and the person in the office.

calhop.com.au

FIND A TASK

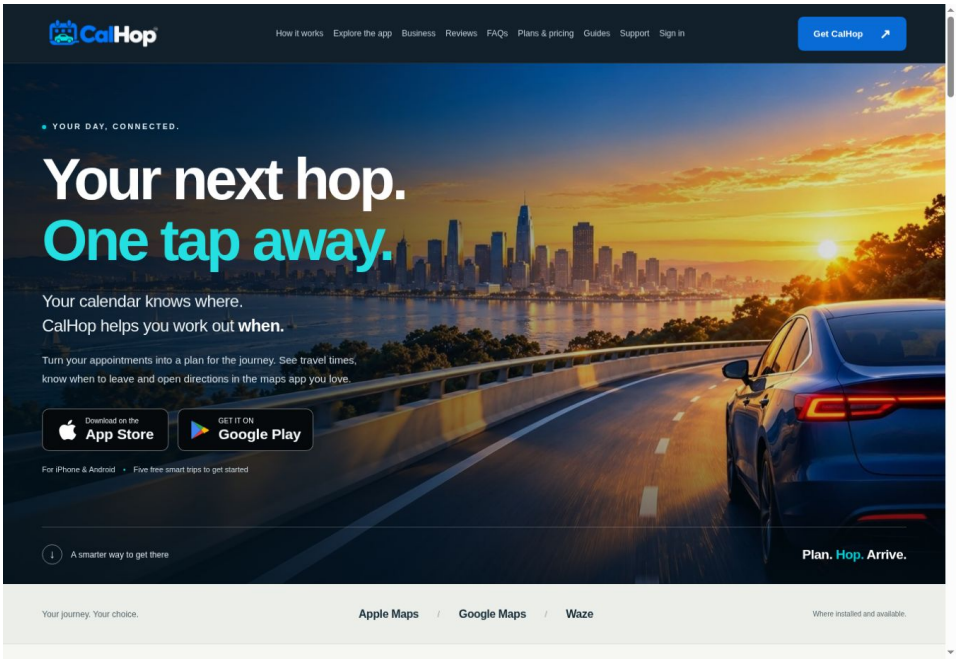
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Tap a topic to jump to its page. For a CRM, use the provider directory on page 19.

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01 / START HERE

Where to log in



Look at the top menu: Sign in is after Support and before the blue Get CalHop button.

01 Open the website

Open your browser and type **calhop.com.au** into the address bar.

02 Choose Sign in

Select **Sign in** in the top menu. This opens CalHop Business. You can also go straight to https://calhop.com.au/business/.

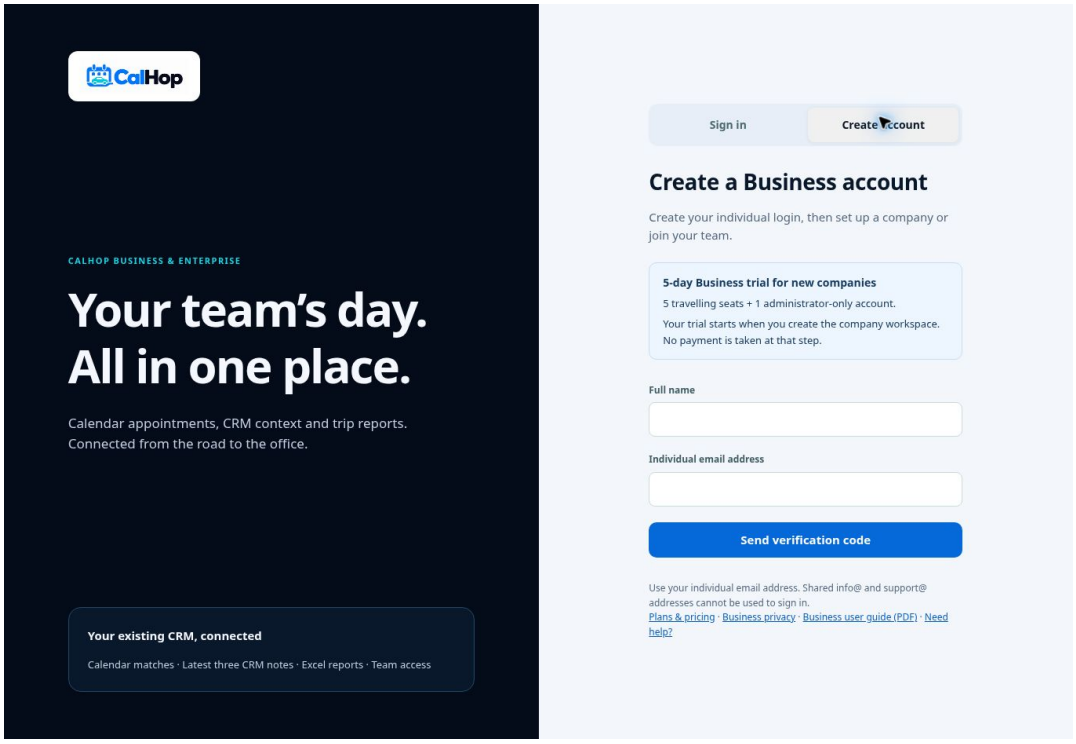
03 Choose the right option

Already registered? Choose **Sign in**. First time? Choose **Create account**. If your company invited you, open its invitation link and use the email address it invited.

Phone or computer?
The same Business email and password work on both. On a small screen, the direct address above is the easiest way to reach the website hub. **Get CalHop** takes you to app downloads, not the Business login.

02 / FIRST TIME ONLY

Create your account



01 Enter your name and email

Choose **Create account**. Enter your **Full name** and your own individual email address. Shared **info@** and **support@** addresses cannot be used to log in.

02 Check your email

Select **Send verification code**. Enter the 8-digit code sent to your inbox. It lasts 10 minutes. Check your junk folder if it is missing.

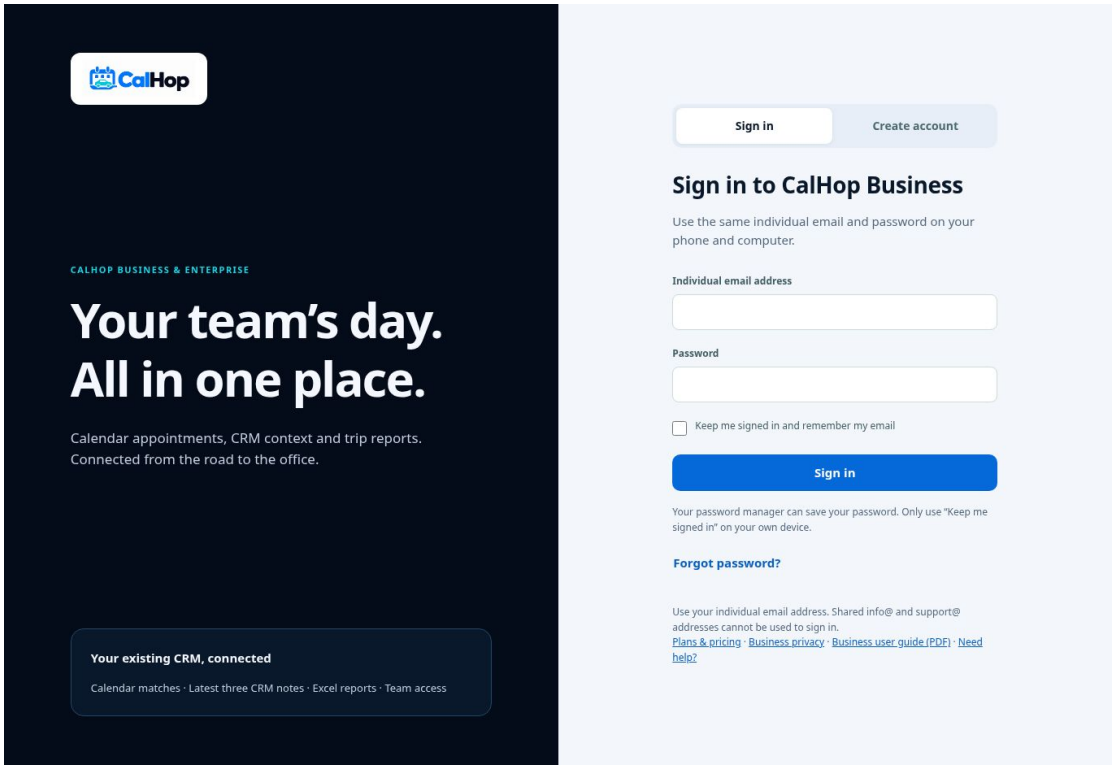
03 Choose a password

Enter a password of 15-128 characters. A memorable phrase can help. Select **Finish account setup & sign in**. Keep the page open while checking your email.

You should now see
A welcome screen where you can create or join a company. If you already have an account, return to Sign in or use Forgot password? rather than creating another one.

03 / RETURNING USERS

Sign in next time



01 Open the Business sign-in page

Go to https://calhop.com.au/business/ or select Sign in on the main website.

02 Enter your email and password

Use the Business account you created. Select the blue **Sign in** button below the password field.

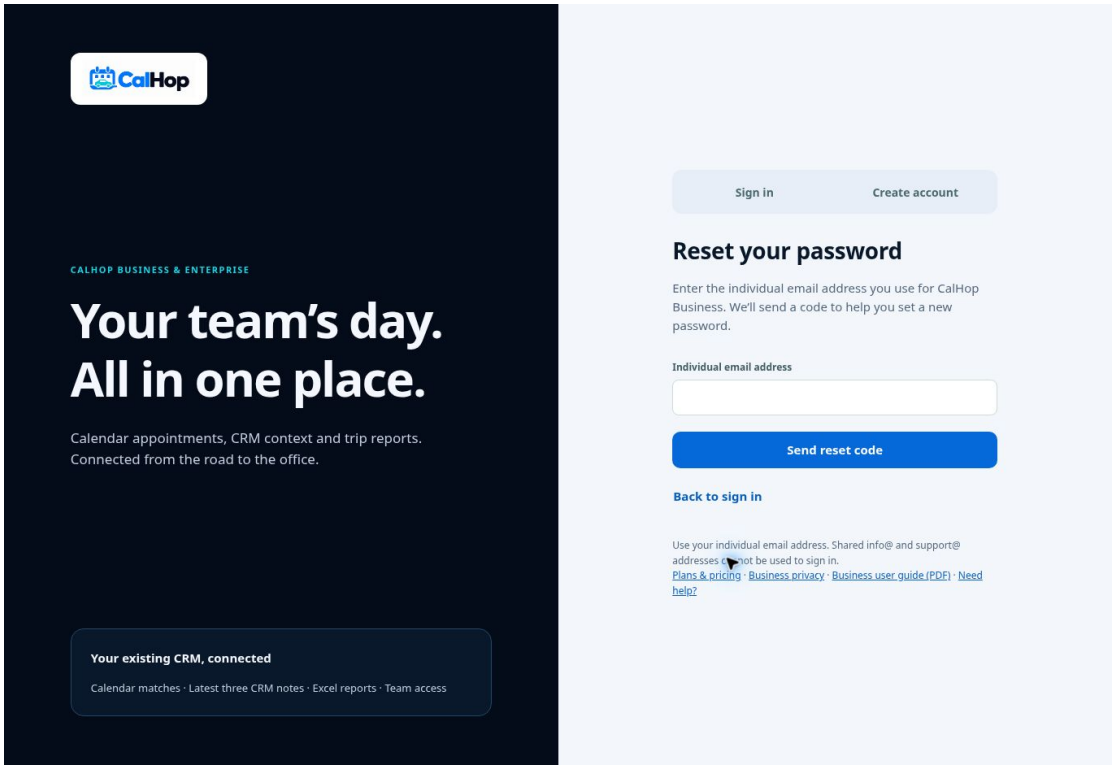
03 Remember your own device

Tick **Keep me signed in and remember my email** if this is your own device. Your password manager can separately save and fill the password. Do not keep a shared computer signed in.

Do I need a code every time?
No. Codes are for first-time setup or password recovery. Normal sign-in uses your email and password. Your Google, Microsoft, Apple or CRM password is not automatically your CalHop Business password.

04 / GET BACK INTO YOUR ACCOUNT

Forgot your password?



01 Open password recovery

On the sign-in page, select **Forgot password?**.

02 Request a code

Enter the individual email address you used for Business. Select **Send reset code** and check your inbox and junk folder.

03 Set the new password

Return to the page. Enter the emailed code, check your full name and choose a new password. Select **Save new password & sign in**.

If the code does not work

Use the newest code and the current verification page. If it has expired, request another one. Never send your password or verification code to another person, including support.

05 / COMPANY SETUP AND PHONE ACCESS

Join your company

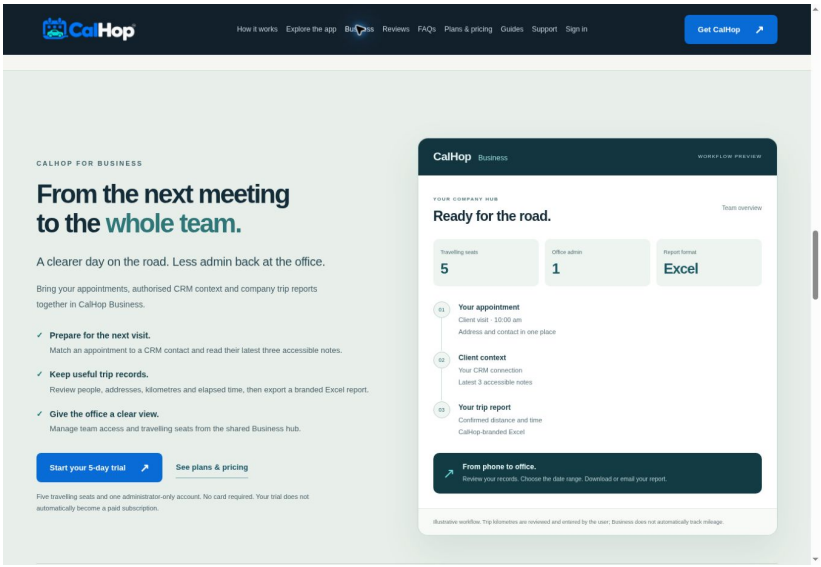
01 If you are the company owner
After account setup, enter the **Company name** and select **Create company workspace**. The person who creates it becomes the owner.

02 If your company invited you
Open its invitation link. Sign in with the exact email address invited and select **Accept invitation**. Do not create a second workspace for the same team.

03 Open Business on your phone
Open the CalHop app and choose **Business**. Sign in with the same individual email and password. Check that the correct company name appears.

04 Check that you can use it
Business seat active means you have travelling access. If it says inactive, ask the owner to check your seat and company access.

Starting from the website’s Business section



The **Start your 5-day trial** button also opens account creation. The trial starts when you create the company workspace. The right-hand panel above is a website illustration, not your actual company records.

06 / FIND YOUR WAY AROUND THE HUB

What the website buttons mean

The menu is on the left on a computer. On smaller screens, it appears across the top and you may need to scroll it sideways. The options you see depend on your company role.

Menu item	What it does
Overview	A quick summary of recorded visits, distance and time, plus recent trips.
Trips & reports	Add your trips, check saved entries, choose a date range, and download or email a report.
Calendar & CRM	See appointments that have been matched to existing CRM contacts. Open the latest three available notes.
Team & access	Owners and administrators invite people and manage seats. Other users see their own access.
CRM connections	Connect, reconnect or disconnect your own supported CRM account.
Plans & billing	Owners and billing administrators choose seats and view billing options.
Settings	Sign out, view account information and find account controls.

The controls around the menu

Your workspace: choose the company you want to work in.
Refresh: load the latest saved information.
Business user guide (PDF): open this manual.
Help & support: find help from CalHop.

What the totals mean
Completed visits counts finished visits. **Kilometres travelled** adds confirmed distance. **Travel time** is the time between departure and arrival. **Meeting time** is the time between meeting start and end. These totals reflect the records in the current report.

07 / USE BUSINESS WHILE TRAVELLING

What the phone screen means

In the CalHop app, open **Business**. The company name and access status appear above three main choices.

Phone section	Use it to...
Trips & reports	Add a visit, correct your own entries, choose report dates and export or email the spreadsheet.
Calendar & CRM	Load upcoming appointments, find the matching CRM contact and read their latest notes.
Team & company	Check your account and company access. Administrators can manage team access. Open the full website hub for more controls.

Common buttons and messages

Add business trip: start a new trip record.
Refresh trips: fetch the newest saved records.
Apply report filters: show only the dates or client you chose.
Export Excel / share: save or share the spreadsheet.
Unconfirmed kilometres: actual distance has not been entered yet.
Connected: a connection is saved; permissions or an expired token can still affect what it can read.

If you cannot see Business
Business features on iPhone are being tested through TestFlight and may not be in your public App Store version. Check with CalHop which build supports Business. You can use the website hub in the meantime.

Your first day

Sign in → choose the company → check your calendar → connect your CRM → match one appointment → record one completed trip → review the report. You do not have to set up the whole team before learning these basics.

08 / FOR THE OWNER OR ADMINISTRATOR

Invite your team

01 Open the team page

On the website, choose **Team & access**, then **Invite teammate**. Check the available seat count.

02 Enter their details

Use the teammate’s own work email. Choose their role from the list below. Only the owner can invite administrator and billing administrator roles.

Role	What it means
Owner	The person responsible for company access and billing.
Administrator	The office person who manages team access and company reports.
Member / Manager	Records and sees their own trips and CRM context. Manager does not mean company-wide report access.
Billing administrator	Handles billing and seat information; does not receive general administrator permissions.

03 Choose a seat and send the invite

Reserve a seat for anyone who records trips. An office-only administrator can be invited without a travelling seat. Tick **Send an invitation email now** if wanted, then select **Create invitation**. Otherwise, share the generated link with that person.

04 Change access when needed

Select **Manage** next to a member, adjust their role, seat or status, then **Save access**. Use **Revoke** for an unused invitation. Invitations expire after seven days.

One person can look after the office

An administrator can review company reports and manage the team. They need a travelling seat if they also record trips. HubSpot access has extra restrictions explained on page 11.

09 / WEBSITE SETUP

Connect your existing CRM

Your CRM stays your client database. CalHop reads authorised client details and notes to help you prepare for appointments.

01 Choose your company and CRM

Open CRM connections in the Business hub. Find your provider and select its logo tile.

02 Read the tile status

Ready to connect opens the available sign-in flow. Setup pending means CalHop still needs to finish registration or testing. Not yet available means the connector is still planned.

03 Sign in with the provider

When available, select Continue to provider sign-in, choose the correct account and approve the access shown by your CRM. Enter your CRM password only on that provider's page.

04 Check the saved connection

Return to CalHop and wait for Connected. Use Finish setup / check connection to find a known client and check the notes.

Each customer authorises their own account

Do not reuse another company's token or share administrator credentials. Customers do not normally need to register a developer app for an enabled CalHop OAuth connector.

HubSpot access has an account-wide notice and is restricted to authorised owners/administrators. Some planned providers require administrator-assisted setup instead of a standard OAuth popup.

Find your provider's exact preparation steps on page 19.

10 / BEFORE THE APPOINTMENT

Find a client and read their notes

01 Load appointments on your phone
Check your selected calendars in CalHop. Open **Business > Calendar & CRM** and select **Load upcoming appointments**. This loads the next 14 days.

02 Choose an appointment
Select the business appointment. Choose your connected CRM. If necessary, use **Connect CRM on website** first.

03 Search for the client
Replace the meeting title with the person’s name, company or exact email. Select **Find matching CRM records**.

04 Check the result carefully
Compare the name, company and email. Select **Confirm appointment match & read notes** only when it is the right record.

05 Read the latest notes
CalHop displays up to three available notes and their dates. Fewer may appear if there are fewer notes or your connection cannot read them. Add or change notes in your original CRM.

On the computer

Open **Calendar & CRM** to see confirmed matches. Select **Latest three CRM notes** to read through your own permitted connection. **Search connected CRM** lets you look up a contact; use the phone to confirm an appointment match.

Only confirm business appointments
The selected contact’s name, company and email become visible to company administrators. Your whole calendar is not copied into the hub. Notes are fetched through your own CRM connection. If a match is wrong, use **Remove match** on your own match and try again.

11 / AFTER THE VISIT

Add or change a trip

01 Start the entry
Phone: **Trips & reports > Add business trip**.
Website: **Trips & reports > Add trip**. Check the company first.

02 Record who and where
Enter the client/company, people seen, full starting address and full destination address. On the website, separate names with a semicolon, such as Alex Chen; Sam Lee.

03 Record dates and times
Enter departure and arrival. Add meeting start and end if known. Check the date and time zone, especially for overnight travel.

04 Record kilometres and status
Enter estimated kilometres separately from confirmed kilometres travelled. Leave confirmed kilometres blank until known. Choose **Completed**, **Planned** or **Cancelled**.

05 Save and check
Select **Save trip**, then review the saved row. Use **Edit** on your own trip to make a correction. Delete only if the record should be removed.

Example
You leave at 9:00 am, arrive at 9:30 am and meet from 9:30 to 10:15 am. Actual distance is 25.6 km. Your report shows **30 travel minutes**, **45 meeting minutes** and **25.6 confirmed km**.

Remember: Business does not automatically track mileage. You review and enter the distance. Matching a calendar appointment to a CRM contact does not automatically create a completed trip. Record a return journey separately if you want it included.

12 / WHAT YOU GET OUT OF IT

Understand your Excel report

Your Excel file is a record of the visits and travel saved in CalHop. One row represents one trip entry. It gives the person in the office a consistent way to review activity without collecting separate lists from everyone.

At the top of the spreadsheet

You will see the CalHop logo, company name and summary totals: **completed visits, confirmed kilometres, travel minutes and meeting minutes**. The rows underneath show the details behind those totals.

Use the report to...	How it helps
Review client visits	See which clients were visited, who attended and when.
Check travel activity	Compare addresses, confirmed kilometres and travel time for the reporting period.
Review time spent	Separate travel time from meeting time. This helps with workload and visit planning.
Prepare internal records	Provide a consistent spreadsheet for your manager, office or accounts team. Follow your company’s rules for any expense claim.
Find missing information	Spot completed trips that still need actual kilometres, people seen or meeting times.

Estimated is not confirmed
An estimate is a planning figure. Confirmed kilometres are the distance you have checked and entered. Do not add both columns together: that would count the same journey twice. A blank confirmed value is not proof that no travel occurred.

The report is based on what users save. It is not automatic proof of travel or approval of an expense claim. Company administrators can export company records; ordinary members export their own permitted records.

13 / READ EACH TRIP ROW

What the Excel columns mean

Column or group	Plain-English meaning
Trip date / Employee	The date of the trip and the signed-in person who recorded it.
Client / company / People seen	The customer or business visited, plus the people recorded for the completed visit.
Km travelled (confirmed)	The checked distance for that trip. This contributes to confirmed-distance totals.
Estimated km	A planning estimate, kept separate from confirmed distance.
From address / To address	Where the recorded journey started and ended.
Departure / Arrival	The dates and times used to calculate travel minutes.
Travel minutes	Elapsed time between departure and arrival.
Meeting start / Meeting end	The dates and times of the visit or meeting, if entered.
Meeting minutes	Elapsed time between meeting start and end.
Distance method	How the confirmed distance was recorded, such as manual entry or odometer readings; otherwise unconfirmed.
Visit status	Completed, planned or cancelled. Only completed visits count as completed visits.
CRM platform / CRM contact ID	CRM references if saved on that trip. They may be blank; a calendar match does not guarantee these fields are populated.
Trip ID / Timezone	A unique reference for the trip and the time zone used for the entry. Useful if support needs to identify a record.

Using Excel: scroll right to see more columns. You can sort or filter the table. Keep an original copy before editing. Changes made in Excel do not update CalHop; correct the trip in CalHop and export again if the source record is wrong.

14 / SHARE THE RIGHT REPORT

Download, print or email

1. Choose the report scope

Open Trips & reports. Use This month, Last month or This year, or enter From date and To date. Choose Client, Visit status and, for administrators, Employee. Select Apply filters after manual changes.

2. Check the results

Review company, dates, rows and confirmed kilometres. If nothing matches, use Reset filters. Date shortcuts retain your other filter selections.

3. Download or print

Download Excel saves CalHop-Trip-Report.xlsx. View / print report opens the report preview; check the selected scope before printing or saving a PDF.

4. Email the Excel report

Select Email report, enter an authorised recipient and choose Review email export. Confirm recipient, company, date range, client, employee, status, trip count and confirmed kilometres before selecting Send Excel report.

5. Confirm delivery

Submitted for delivery does not prove inbox receipt. Check the receiving inbox. If the review expires or records change, prepare a new review. Reports contain employee and client information.

On your phone

Apply filters and select Export Excel / share, then choose where to save or share the workbook. Shared email addresses can receive reports; individual addresses are required for Business sign-in.

15 / COMPANY OWNER OR BILLING ADMINISTRATOR

Trial, seats and payment

Five-day trial

A new company receives five travelling seats and one administrator-only account for five days. No card is needed. The trial does not automatically become a paid subscription.

Who needs a seat?

Anyone recording trips needs travelling access. An office-only administrator can manage reports without a travelling seat. HubSpot requires an owner or administrator with an active travelling seat.

Business pricing

A$14.99 per travelling user monthly or A$149.99 annually, including GST. Annual payment is upfront. Check Plans & billing for the current price and terms before purchasing. Enterprise is enquiry-only.

Paid checkout is enabled

Use the owner or billing administrator account. Open Plans & billing, choose the billing period and seat quantity, and review the total and recurring-payment terms in checkout. Saving a preference alone does not take payment.

Manage access and subscriptions

Team & access shows assigned, reserved and available seats. Removing a member releases their seat; it does not by itself cancel or reduce a paid subscription. Manage the subscription through Plans & billing.

Individual plans remain separate

Business seat access is separate from Individual App Store or Google Play subscriptions. Manage an existing store subscription through the store where purchased.

16 / QUICK HELP AND ACCOUNT CONTROLS

Fix a problem

01 Cannot sign in
Use your individual CalHop login, not a shared info@ or support@ address. Use Forgot password if needed.

02 Cannot see the right company
Check the company selector and your team invitation. Ask the workspace owner to check your role and seat access.

03 CRM shows Setup pending
CalHop still needs to complete provider registration or live testing. Re-entering a password will not enable the connector.

04 Connected but no client or notes
Check the same CRM account, exact client email and record permissions. Notes can be a different activity type from emails or calls.

05 Appointments missing on the website
Use the live calhop.com.au website, the same Business login and workspace, then Refresh & sync appointments on your phone. See page 45.

06 Need to change access or stop a connection
Use Team & access for company access and the CRM tile's Disconnect action for your connection. Ask the owner about billing or seat changes.

Get help without sharing secrets
Send the provider name, app version, company and exact error to support@calhop.com.au. Never send passwords, verification codes or access tokens.

17 / CONNECTION OPTIONS

CRM directory

The directory contains 45 providers. A listing is not proof of a connected account or completed live validation. Check your live tile and the account you are authorised to use.

Cirvello
HubSpot
ActiveCampaign
Salesforce
Microsoft Dynamics 365
Zoho CRM
Pipedrive
Salesflare
Pipeline CRM
Kommo
Sellsy
Intercom
HighLevel
folk
Teamgate
Scoro
SpotlerCRM
noCRM
Freshsales
monday CRM
SugarCRM
SuiteCRM
EspoCRM
Attio
Zendesk Sell
Agile CRM
Salesmate
Odoo CRM
Insightly
Copper
Close
Nimble
Keap
Bitrix24
SAP Sales Cloud
Oracle Sales
Sage CRM
NetSuite CRM
Creatio
Nutshell
Less Annoying CRM
OnePageCRM
Act!
Vtiger
Capsule

Provider pages that follow are setup references, not availability guarantees. Newer providers use the setup fields and help shown in the live hub. Never send passwords or API tokens to support or AI help.

Connect and verify your CRM

1. Check availability

Open CRM connections. Ready to connect means setup is offered for your login. Connected means a connection is saved. Neither label proves that a particular client and their notes have been retrieved.

2. Use your authorised CRM account

Some providers use their own sign-in and consent screen; others ask for an API key and organisation address. Use only credentials issued for the account you intend to connect. Credentials belong in the connection form, never in AI help.

3. Respect pending and private providers

Provider approval pending and CalHop setup required mean customer setup is not ready. Private test only and Connected - private test are restricted validation access, not a public release.

4. Check a known contact and notes

Select Finish setup / check connection, then Find a client and check notes. Search by exact email where possible. Confirm name and company, then Read latest three CRM notes. An empty search or empty notes response is not proof that existing records were retrieved.

5. Keep each account separate

Connections are private to your login and workspace. Signing into a different CRM account in another browser tab does not change CalHop's saved connection. Each teammate connects their own authorised account.

6. Match appointments deliberately

Only confirm the correct contact. A confirmed match shares selected appointment and client details with company administrators. CalHop does not automatically choose between similar names.

HubSpot

Before you start

Use the HubSpot account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select HubSpot. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Salesforce

Before you start

Use the Salesforce account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Salesforce. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

21 / CRM SETUP

Microsoft Dynamics 365

Before you start

Use the Microsoft Dynamics 365 account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Microsoft Dynamics 365. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

22 / CRM SETUP

Zoho CRM

Before you start

Use the Zoho CRM account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Zoho CRM. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

23 / CRM SETUP

Pipedrive

Before you start

Use the Pipedrive account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Pipedrive. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

24 / CRM SETUP

Freshsales

Before you start

Use the Freshsales account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Freshsales. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

monday CRM

Before you start

Use the monday CRM account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select monday CRM. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

SugarCRM

Before you start

Use the SugarCRM account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select SugarCRM. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

27 / CRM SETUP

SuiteCRM

Before you start

Use the SuiteCRM account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select SuiteCRM. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Odoo CRM

Before you start

Use the Odoo CRM account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Odoo CRM. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

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Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Insightly

Before you start

Use the Insightly account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Insightly. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

30 / CRM SETUP

Copper

Before you start

Use the Copper account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Copper. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Close

Before you start

Use the Close account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Close. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Nimble

Before you start

Use the Nimble account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Nimble. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Keap

Before you start

Use the Keap account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Keap. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

34 / CRM SETUP

Bitrix24

Before you start

Use the Bitrix24 account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Bitrix24. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

35 / CRM SETUP

SAP Sales Cloud

Before you start

Use the SAP Sales Cloud account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select SAP Sales Cloud. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Oracle Sales

Before you start

Use the Oracle Sales account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Oracle Sales. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

37 / CRM SETUP

Sage CRM

Before you start

Use the Sage CRM account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Sage CRM. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

NetSuite CRM

Before you start

Use the NetSuite CRM account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select NetSuite CRM. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Creatio

Before you start

Use the Creatio account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Creatio. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Act!

Before you start

Use the Act! account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Act!. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

41 / CRM SETUP

Vtiger

Before you start

Use the Vtiger account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Vtiger. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

Capsule

Before you start

Use the Capsule account you are authorised to access. Confirm that the intended user can read the contact and note records you want to use. Check the live tile for current availability; this page is not a release guarantee.

1. Open the provider tile

In CRM connections, select Capsule. Read the displayed requirements. If provider approval or CalHop setup is pending, customer connection is not yet available. Private tests are restricted validation access.

2. Complete the displayed connection method

If sign-in is offered, review the provider account and requested permissions before consenting. If credential fields are shown, use the account API details and organisation address requested by that form. Never paste secrets into AI help or email.

3. Verify the saved connection

After saving or returning from the provider, select Finish setup / check connection. A Connected label means a connection is saved; it does not prove that any specific contact or note has been retrieved.

4. Retrieve a known contact and notes

Search by exact email where possible. Confirm the person and company, then read the latest three CRM notes. An empty result may mean no matching or accessible records. Check the source account before assuming data is missing.

If you need help

Keep the connection in place while checking account access and the displayed error. Record the provider name, time and non-secret error text. Ask your CRM administrator about permissions. See page 20 for the shared workflow.

43 / CALENDAR & CRM

Sync appointments and clients

01 Select calendars on your phone
Choose the Google, Microsoft/Outlook, device or supported CalDAV calendars CalHop should use.

02 Sign in to CalHop Business
Use the same individual CalHop login and company workspace on the phone and at calhop.com.au/business/.

03 Refresh & sync appointments
Open Business > Calendar & CRM on your phone. Tap Refresh & sync appointments to upload the next 14 days, up to 500 selected appointments, privately for your login.

04 Use the live website
Open Calendar & CRM at calhop.com.au. The separate crm-test.calhop.com.au workspace cannot receive calendars from the released app.

05 Match and read client notes
Choose Match to CRM. Search by client name, company or exact email; confirm the correct person and review the newest accessible notes.

Automatic sync - prepared for a future app update

Keep my website calendar synced is an opt-in phone feature. It syncs while CalHop is open or when you return, using the chosen login and workspace. Code checks passed; a new app build and device test are still required.

Calendar provider tokens stay on the phone. Direct Google/Microsoft calendar sign-in on the website is not available yet. A CRM match shares the selected appointment with company administrators; it does not record a completed trip.

44 / CONNECTION CHECKS

Test, reconnect and disconnect

01 Use one known client
Search by exact email. Confirm the name, company and account before checking other records.

02 Check three dated notes
Compare CalHop's results with the provider's notes for that record. Fewer than three accessible notes is a valid result.

03 Check an appointment match
Choose an appointment, confirm the intended CRM contact and verify the linked context.

04 Reconnect when asked
If the tile shows Reconnect required, use that action and authorise the correct account again. Your administrator may need to restore permissions.

05 Disconnect when access is no longer needed
Open the CRM tile and choose Disconnect. If company policy also requires revocation at the provider, ask your administrator to remove the CalHop app authorisation there.

Common causes of missing data

Wrong CRM account or region; missing record permissions; an unmapped monday board; notes stored on a different record; emails or calls mistaken for notes; an expired authorisation.

Report the symptom, not a secret
Include the CRM name, exact error and the step that failed. Use synthetic records when possible. Never send a password, access token, client secret or verification code.

45 / ENTERPRISE AND SETUP HELP

Field check-ins and support

Where Enterprise is enabled

01 Set your own preferences
Open Enterprise. Review calendar sharing and field-location consent, then set your timezone and working-day preferences.

02 Check in deliberately
At the visit, choose Check in and allow device location only if you agree. Device accuracy and distance help describe the check-in; they do not prove attendance.

03 Check out when finished
Use your own open visit's Check out action. Review the recorded time and location evidence with your team's agreed process.

04 Review routes before publishing
Authorised managers can prepare route drafts and assign stops. The current foundation does not provide proven traffic-aware route optimisation.

> **Nearby clients and automatic geo-sync**
> Finding other CRM clients along a route, automatic arrival detection and continuous background GPS need further implementation and device testing. Enabling location consent alone does not start background tracking.

Use AI setup help

Choose AI setup help in the Business hub for setup guidance. Follow the consent shown before sharing setup details. Never give the assistant CRM passwords, API tokens or unnecessary customer data. It cannot approve provider permissions for you.

46 / OFFICIAL REFERENCES

Provider references 1/2

Provider requirements can change. These references support the preparation steps; CalHop tile status still determines current availability. Checked 25 October 2026.

HubSpot

developers.hubspot.com - official setup and API guidance

Salesforce

developer.salesforce.com - official setup and API guidance

Microsoft Dynamics 365

learn.microsoft.com - official setup and API guidance

Zoho CRM

www.zoho.com - official setup and API guidance

Pipedrive

pipedrive.readme.io - official setup and API guidance

Freshsales

developers.freshworks.com - official setup and API guidance

monday CRM

developer.monday.com - official setup and API guidance

SugarCRM

rest.apidocs.sugarcrm.com - official setup and API guidance

SuiteCRM

docs.suitecrm.com - official setup and API guidance

Odoo CRM

www.odoo.com - official setup and API guidance

Insightly

documentation.insightly.com - official setup and API guidance

Copper

developer.copper.com - official setup and API guidance

46 / OFFICIAL REFERENCES

Provider references 2/2

Provider requirements can change. These references support the preparation steps; CalHop tile status still determines current availability. Checked 25 October 2026.

Close

developer.close.com - official setup and API guidance

Nimble

www.nimble.com - official setup and API guidance

Keap

developer.keap.com - official setup and API guidance

Bitrix24

apidocs.bitrix24.com - official setup and API guidance

SAP Sales Cloud

www.sap.com - official setup and API guidance

Oracle Sales

docs.oracle.com - official setup and API guidance

Sage CRM

developer.sage.com - official setup and API guidance

NetSuite CRM

docs.oracle.com - official setup and API guidance

Creatio

academy.creatio.com - official setup and API guidance

Act!

www.act.com - official setup and API guidance

Vtiger

help.vtiger.com - official setup and API guidance

Capsule

developer.capsulecrm.com - official setup and API guidance

48 / CALHOP TEST ACCOUNTS

Trial and billing checks

Owner setup record checked 25 October 2026. These are CalHop test accounts, not the subscriptions of customers connecting their own CRM.

Pipedrive: expires without charging

Billing requests payment details and has no invoices. Pipedrive confirms that trials without billing details close automatically. Keep payment details absent; no paid upgrade was made.

Capsule and monday: free plans

Capsule shows Free Plan. monday billing shows Plan Free, with a Developer account. These can remain available for integration testing.

Salesforce: Developer Edition

The Developer Edition has no trial expiry date recorded. Keep this build account active; it will own installation packages. No paid subscription was purchased.

Mapsly: closure requested, still pending

The account remains an unsubscribed trial. An existing support request asks to cancel the trial, delete the Mapsly organisation and confirm no remaining charges. Support is due back Monday. HubSpot sync is off; account deletion is not yet confirmed.

Microsoft: billing administrator needed

The Sales trial has 29 days remaining. No payment details were entered. The current Microsoft user cannot view tenant billing, so recurring billing has not been independently cleared. Keep the trial for testing until an authorised admin verifies it.

Other providers

Zoho, Freshsales and Close have no newly completed test subscription confirmed. Their registration and verification steps remain pending.

A request, a free trial and a confirmed cancellation are different states. Do not record a provider as cancelled until its account or support confirmation establishes that result.

17 / CONTACT CALHOP

We’re here to help

Need help getting started, connecting your CRM or understanding a report? Contact us using the details below.

Website
www.calhop.com.au

Business sign-in
calhop.com.au/business/

General enquiries
info@calhop.com.au
Questions about CalHop, Business or Enterprise access.

Technical support
support@calhop.com.au
Help with signing in, connections, trips and reports.

Online support: calhop.com.au/support

What to include in your message

Tell us your device, app version, company name, the screen you were using and the exact error. A screenshot can help if it does not contain private client details. Never send passwords, verification codes or CRM access tokens.

Keep this guide handy: save a copy or open Business user guide (PDF) from the website hub. This guide describes the current Business beta; screens and availability can change as updates are released.