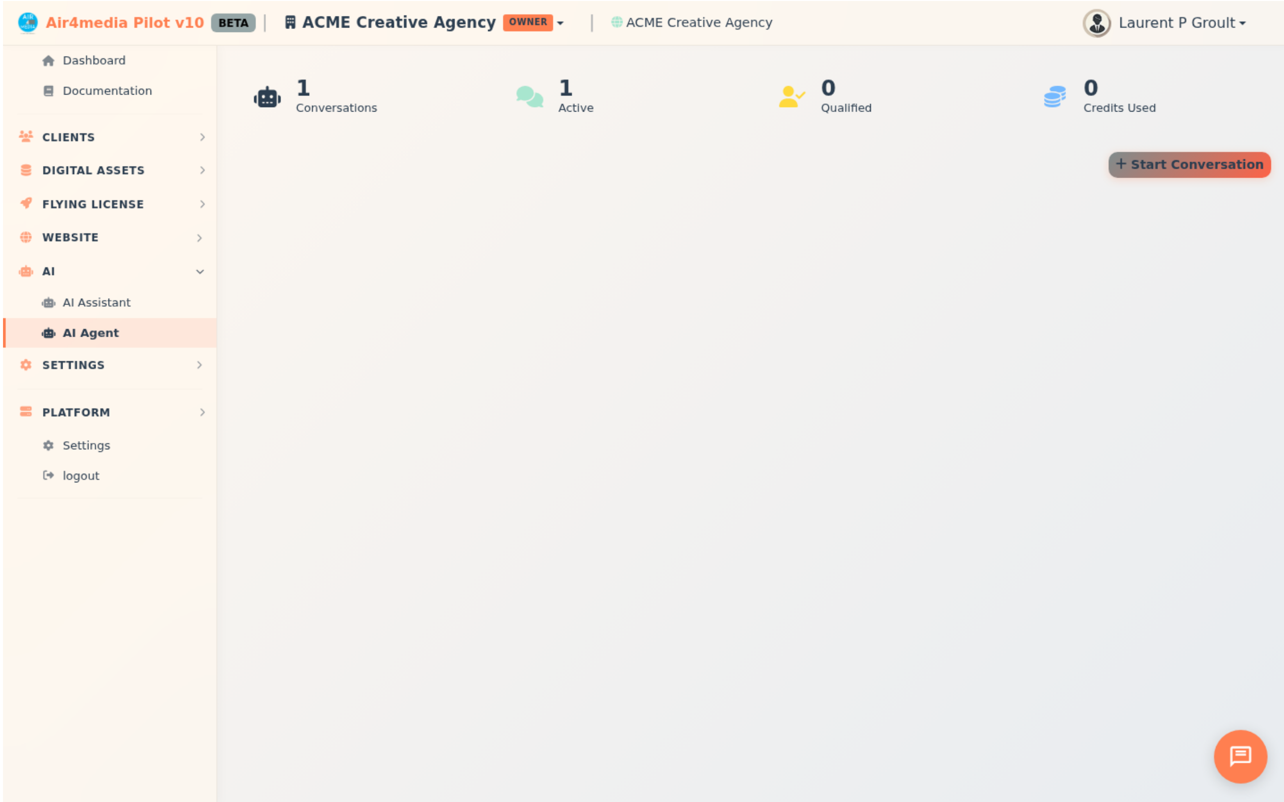


# AI Agent

The AI Agent lets you run intelligent conversations with contacts — qualifying leads, onboarding new clients, helping a prospect choose a service, or collecting feedback — all through a natural chat interface powered by AI.

## Key Features

- **Five Conversation Types**: Lead Qualification, Onboarding, Decision Helper, Follow-up, and Satisfaction Survey — each with a tailored conversational approach
- **Smart Chat Interface**: The AI asks questions one at a time in a natural tone. Press Enter to send; Shift+Enter adds a new line without sending
- **Automatic Analysis**: After 4+ exchanges, the AI silently builds a full profile — urgency score (out of 10), budget indicator, decision-maker status, detected motivations, recommended services, pricing tier, and a written summary
- **Auto-Completion**: When the AI has gathered enough to determine an outcome, it closes the conversation automatically
- **Shareable Links**: Generate a link for any conversation and send it to a contact — they can reply without needing an account
- **Outcome Tracking**: Each completed conversation is tagged Qualified, Not Qualified, Needs

Nurturing, or Referred

- **At-a-Glance List**: The conversation list shows contact name, type, status, message count, urgency score, and outcome — scan priorities without opening each chat
- **Dashboard Stats**: See totals at a glance — Conversations, Active, Qualified leads, and Credits Used
- **Search & Filter**: Search through conversation summaries, or filter by type, status, or outcome; switch between table and card view
- **Bulk Delete**: Select multiple conversations and remove them in one step

## How to Use

1. Click **Start Conversation** to open the setup dialog
2. Select a conversation type — for example, **Lead Qualification** for a new prospect inquiry
3. Choose a contact from the dropdown (e.g., a contact at ACME Creative Agency) and optionally link a project
4. Click **Start** — the AI opens with a personalized greeting and its first question
5. Type your replies in the chat box and press **Enter** to send
6. When the **"Analysis updated"** badge appears, the AI has generated insights — click the **chart icon** in the chat header to open the Analysis panel
7. The Analysis panel shows urgency score, budget indicator, decision-maker status, motivations, recommended services, pricing tier, and a written summary
8. Click **Complete** to close the conversation manually — or let the AI close it automatically once an outcome is reached

## Sharing a Conversation

Open a conversation, click the **share icon** in the chat header, and the link is instantly copied to your clipboard. Send it to your contact — they can respond without logging in.

## Tips

- The AI builds its analysis after at least 4 exchanges — the more a contact shares, the richer the insights
- Use **Lead Qualification** for new inquiries, **Decision Helper** when a prospect is comparing options, and **Satisfaction** after a project wraps up
- Filter by **Qualified** outcome to surface your hottest leads quickly
- The urgency score and outcome are visible directly in the list — no need to open each

conversation to prioritize follow-ups

- Credits are consumed per AI response — keep an eye on the Credits counter in the stats bar