



AI Agent

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

Key Features

- **Five Conversation Types:** Choose the right kind of conversation for the moment — Lead Qualification, Onboarding, Decision Helper, Follow-up, or Satisfaction Survey
- **Smart Chat Interface:** Real-time back-and-forth chat where the AI asks questions naturally, one at a time, without feeling like an interrogation
- **Automatic Analysis:** After enough exchanges, the AI silently generates a full lead profile — urgency score, budget range, decision-maker status, recommended products, pricing tier, and a written summary
- **Shareable Conversation Links:** Generate a link and send it to a contact so they can continue the conversation on their own, without logging in
- **Outcome Tracking:** Each conversation is automatically tagged as Qualified, Not Qualified, Needs Nurturing, or Referred once the AI has enough information
- **Dashboard Stats:** See totals for all conversations, active ones, qualified leads, and credits

used at a glance

- **Filtering:** Filter your conversation list by type, status, or outcome to focus on what matters

How to Use

1. Click **Start Conversation** to open the setup dialog
2. Select a conversation type (e.g., Lead Qualification)
3. Optionally link the conversation to a contact and/or project
4. Click **Start** — the AI opens with a personalized greeting and first question
5. Type your replies in the chat box and press Enter to send
6. Watch for the "Analysis updated" badge — this means the AI has generated insights
7. Click the chart icon in the chat header to view the full analysis panel
8. When done, click **Complete** to close the conversation and save the outcome

Sharing a Conversation

To let a contact respond on their own:

1. Open the conversation
2. Click the share icon in the chat header
3. The link is automatically copied to your clipboard
4. Send the link to your contact — they can reply without an account

Tips

- The AI generates its analysis after at least 4 exchanges — the more your contact shares, the richer the insights
- Use **Lead Qualification** for new inquiries, **Decision Helper** when a prospect is comparing options, and **Satisfaction** after an event wraps up
- Filter by "Qualified" outcome to find your hottest leads quickly
- Credits are consumed per AI message — check the Credits counter in the stats bar to track usage