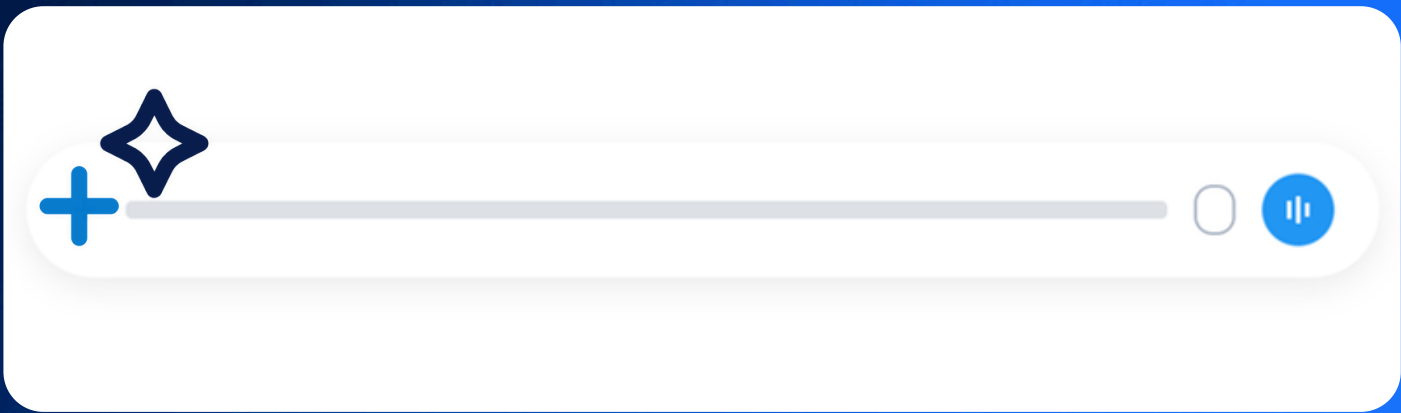


REFERENCE GUIDE

Ask AI

Chat, Act, and Create Faster



Opening Ask AI and Chats

What It Is

Ask AI is a chat assistant built into your software. Open the quick panel from the top bar button, or search for Ask AI for the full-screen workspace, and keep each topic in its own chat.

How It Works For Your Business

- Click the Ask AI icon in the top bar to open a side panel from any page.
- Search for Ask AI for the full-screen workspace with more room.
- Use the toggles at the top to switch full screen and chat history.
- Click New chat for a fresh thread and use Search to find old chats by keyword.
- Click the microphone icon in the message bar to speak, then review the text and send.

Opening Ask AI and Chats – Tips & Guidelines

Tips

- Use the top bar for quick questions and the workspace for bigger jobs.
- Keep one topic per chat so history stays easy to search.
- Allow microphone permission in your browser before you record.
- The template view opens first in the workspace, so look for the cards.

DO

- Start a new chat for each topic
- Search history before asking again
- Review voice text before sending
- Use the panel for quick checks

DON'T

- Mix many topics in one chat
- Hunt through menus first
- Send voice text unread
- Forget the history toggle

Contact Summaries and Questions

What It Is

Ask AI can pull a contact's details from your live account data into one clear summary, then answer follow-up questions in the same chat in plain English.

How It Works For Your Business

- Type Summarize a contact and send it.
- Give a name, an email address, or a phone number when Ask AI asks who.
- If several people match, pick the right one from the list.
- Read the profile, lead source, created date, pipeline opportunities, appointments, and tasks.
- Ask follow-ups like pending tasks, next appointment, amount paid, owner, or stage.

Contact Summaries and Questions – Tips & Guidelines

Tips

- Use an email or phone number because they are unique.
- Stay in the same chat so Ask AI remembers the contact.
- If it cannot find an answer, it says so instead of guessing.
- The summary uses live data, so it is current.

DO

- Type email or phone to look up
- Ask follow-ups in the same chat
- Read the whole summary
- Practice on a test contact

DON'T

- Search by first name only
- Start a new chat per question
- Assume sections always appear
- Practice on a real customer

Confirmations and Taking Action

What It Is

Ask AI can do things, not just answer. Every write, update, or delete shows a confirmation first, so you read what it plans to do and then approve or cancel.

How It Works For Your Business

- Type a request such as create a task for this contact to follow up on Friday.
- Ask AI shows a confirmation that spells out what it is about to do.
- Read it, then approve it if it looks right.
- If something is off, cancel or tell Ask AI what to change.
- You can use the same pattern to update a contact field, like a phone number.

Confirmations and Taking Action – Tips & Guidelines

Tips

- Read every confirmation word for word before approving.
- Include the contact and the date in your request.
- Tell Ask AI what to change instead of starting over.
- Try changes on a test contact first.

DO

- Read the confirmation fully
- Name the contact and date
- Cancel when unsure
- Check the result afterward

DON'T

- Approve without reading
- Use vague requests
- Practice on real customers
- Skip the result check

Using Templates

What It Is

Templates are ready-made jobs shown as cards in the workspace. You answer a few guided questions, review a summary, and approve, with no menu hunting.

How It Works For Your Business

- Search for Ask AI and click Templates to see the template cards.
- Use tabs like All, Communication, CRM, Commerce & Payments, AI Agents, Integrations, Social Media, Sales, and Marketing.
- Type a keyword like calendar or invoice in the search box.
- Click a card, answer the guided prompts, and read the summary.
- Approve, then open the area it touched, like Calendars or Opportunities.

Using Templates – Tips & Guidelines

Tips

- You only see templates your role may run, so a missing one is likely permissions.
- Ask Ask AI in the chat what a choice means before you decide.
- Keep a short list of your three or four favorite templates.
- You can always type your own request instead.

DO

- Open each tab once
- Answer prompts one at a time
- Review the summary
- Check the new item

DON'T

- Skip the summary
- Rush the questions
- Assume a bug if hidden
- Forget you can type

Content and Images

What It Is

Ask AI can draft email templates, blog posts, and images from a chat. You review, adjust in the same chat, and move the result to where it belongs.

How It Works For Your Business

- Ask for an email template, then search for Email Builder to find it.
- For a blog post, give audience, length, tone, and keyword, then search for Blogs and paste the draft into New Post.
- Generate an image by describing it, then type edits in the prompt under the image.
- Name the shape you need, like square, story size, or wide.
- Click the Save icon to keep an image in your media library, or use Copy.

Content and Images – Tips & Guidelines

Tips

- Tell it who the email is for and the action you want.
- Fact-check every blog draft before you publish.
- If the draft feels generic, name exactly what to change.
- Images may need a plan add-on or pay-per-use, so check your account.

DO

- Be specific in prompts
- Fact-check blog drafts
- Save images you like
- Ask for revisions in chat

DON'T

- Publish without reading
- Use vague prompts
- Forget to save images
- Start over for small edits

Bulk Updates and Account Tasks

What It Is

Ask AI can handle multi-step and bulk work: move opportunities, tag lists of contacts, create tasks, book appointments, make invoices or coupons, and manage media files.

How It Works For Your Business

- Ask to move an opportunity to a stage, add a tag to a list of contacts, or create tasks.
- Read the bulk-action confirmation before you approve it.
- For multi-step jobs, watch the live task tracker as the steps run.
- Ask to book, block, and list appointments, or create an invoice or coupon.
- Ask it to upload, find, and organize files in Media Storage, then check the result.

Bulk Updates and Account Tasks – Tips & Guidelines

Tips

- Describe the exact list of contacts so the scope is clear.
- Check the confirmation screen for how many items it will change.
- Verify results in Opportunities and Contacts after a bulk job.
- Start with a small test group before a large one.

DO

- Define the list clearly
- Read the item count
- Verify in Contacts
- Test on a small group

DON'T

- Approve a vague bulk job
- Skip the confirmation
- Assume it worked
- Start with your whole list

Voice Mode, Social Edit, Memory

What It Is

Voice mode lets you speak requests and hear the confirmation. Edit with Ask AI rewrites social posts. Memory stores facts Ask AI can use in later chats.

How It Works For Your Business

- Click the voice mode button, speak your request, and listen to the confirmation.
- In Social Planner, open a post and choose Edit with Ask AI, then apply the rewrite.
- Search for AI Memory to see and manage saved memories.
- Search the memory list and delete any entry you no longer want.
- Use Import memories to add up to 100, then choose Add to memory.

Voice Mode, Social Edit, Memory – Tips & Guidelines

Tips

- Memory entries carry source tags: auto-created, saved, imported, or system.
- Review your memory list now and then and delete old entries.
- Read a rewrite before you apply it to a post.
- Speak slowly in a quiet place for better voice results.

DO

- Review memory regularly
- Read rewrites first
- Use source tags to sort
- Speak clearly

DON'T

- Keep outdated memories
- Apply rewrites blindly
- Import without a look
- Talk in a noisy room

Scheduled Tasks

What It Is

Scheduled tasks run a saved prompt on a schedule so a routine request happens by itself. You set a name, a prompt, and how often it should run.

How It Works For Your Business

- Open the Scheduled Tasks tab and click + New task.
- Enter a Name, write the Prompt, and choose a Frequency.
- Frequency choices are Hourly, Daily, Weekdays, Weekly, Cron, and One-time.
- The list shows Name, Frequency, Next run, Status, and a badge for new results.
- Use Run now, Pause or Resume, Edit, or Delete, and check run history for Successful, Failed, or Skipped.

Scheduled Tasks – Tips & Guidelines

Tips

- Write the prompt exactly as you would type it in a chat.
- Use Run now to test a task before you trust the schedule.
- Pause a task instead of deleting it if you may need it again.
- Check run history when a result looks wrong.

DO

- Test with Run now
- Name tasks clearly
- Pause when unsure
- Review run history

DON'T

- Schedule untested prompts
- Use vague names
- Delete to pause
- Ignore failed runs

Knowledge, Artifacts, and Limits

What It Is

You can attach a Knowledge Base so answers use your documents, ask for artifacts and Mermaid diagrams, and learn what Ask AI cannot do or what your role may see.

How It Works For Your Business

- Create and attach a Knowledge Base from the Ask AI chat so answers use your documents.
- Ask for an artifact or a Mermaid diagram, such as a pipeline flow, and view it in the response.
- Ask AI can list Workflows and Campaigns but only read them.
- It is not connected to some areas, like Affiliate Manager, Chat Widget, the Sites website builder, raw call and SMS logs, or IVR.
- Use thumbs up or down on a response for feedback, and find usage per session in your reports.

Knowledge, Artifacts, and Limits – Tips & Guidelines

Tips

- A not supported reply means that area is not connected, so use the normal screens.
- Compare an admin view with a non-admin view to understand role limits.
- Keep Knowledge Base documents current so answers stay accurate.
- Give feedback on weak answers so they can improve.

DO

- Attach current documents
- Ask for diagrams
- Use thumbs feedback
- Switch screens when blocked

DON'T

- Expect every area to work
- Attach outdated files
- Ignore role limits
- Skip feedback

Key Terms Glossary

Ask AI

Chat assistant that answers questions and does tasks in your account.

Quick panel

Side panel opened from the Ask AI icon in the top bar.

Workspace

Full-screen Ask AI view you open by searching for Ask AI.

Chat history

List of past chats, searchable by keyword.

Confirmation

Screen that shows what will change and waits for approval.

Template

Ready-made Ask AI job with built-in guided questions.

Contact summary

One-message overview of a contact from live data.

Brand voice

Saved description of how your writing should sound.

Memory

Facts Ask AI keeps and uses in later chats.

Scheduled task

A saved prompt that runs on a set schedule.

Knowledge Base

Your documents attached so answers use them.

Artifact

A generated item or diagram shown in the response.

Getting Help

Your software changes over time, so buttons, menus, and plan options may look a little different from this guide. If something does not match, check the in-app help for Ask AI and look for the option with the closest label.