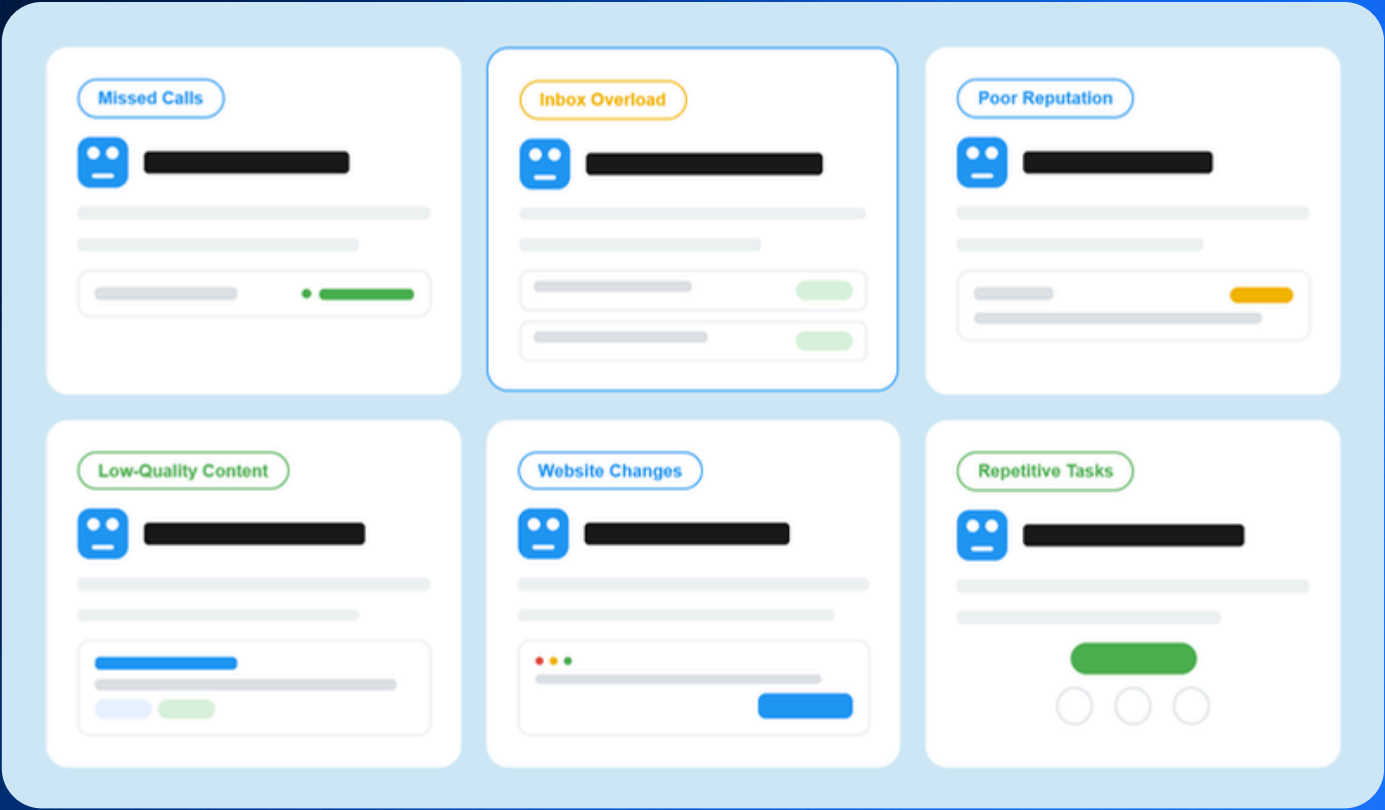


REFERENCE GUIDE

AI Employee

Every AI tool, one clear map



Touring the AI Tools

What It Is

AI Employee is the bundle name for every AI tool in your software. Some you can search for by name and some hide inside other screens, so knowing the map saves time.

How It Works For Your Business

- Search for Conversation AI, Voice AI, Agent Studio, Knowledge Base, or Agent Logs.
- Search for Ask AI, or click it in the top bar. Search for AI Studio too.
- Search for Reputation, open Settings, then the Reviews AI tab.
- Look for Content AI buttons inside the email, social, blog, and funnel builders.
- Look for the Workflow AI Assistant icon in the bottom-left of a workflow.

Touring the AI Tools – Tips & Guidelines

Tips

- AI Agents is AI that talks to customers. Ask AI helps you.
- Menu names can differ by account or plan, so trust your screen.
- A missing tool may not be turned on for your account.
- The Conversation AI dashboard is the home base for AI Agents.

DO

- Click every sub-item once
- Check each builder for AI buttons
- Note tools you cannot see
- Ask your agency about missing tools

DON'T

- Assume one menu holds everything
- Rebuild a bot to fix a missing tool
- Memorize every path
- Skip the Agent Logs screen

AI Plans and Usage Limits

What It Is

Your account is on a plan that sets the rules for AI use. Plans and limits are usually set by whoever manages your software, so you see messages and warnings but do not change the plan.

How It Works For Your Business

- Pay-Per-Use has no monthly fee. You pay when AI does work.
- Growth has a fixed monthly fee with set allowances. Extra use bills pay-per-use unless a limit blocks it.
- Unlimited has no monthly cap on Conversation AI and Voice AI, with fair use.
- If blocking is on, a tool shows a paused message and a Request more usage button.
- Limits reset at the start of each calendar month.

AI Plans and Usage Limits – Tips & Guidelines

Tips

- Alerts appear as you near your limit. AI Studio banners work differently.
- Many accounts keep AI running and only send a notice.
- Phone charges for calls are separate from AI plans.
- Allowance amounts can change, so confirm them before you quote them.

DO

- Ask which plan you are on
- Ask if AI blocks or notifies
- Watch for warnings early
- Use Request more usage if paused

DON'T

- Rebuild a bot that is only paused
- Quote allowance numbers unchecked
- Ignore the early warnings
- Expect to change the plan yourself

Content AI for Writing

What It Is

Content AI writes a first draft inside your builders. The same panel works in the Email Builder, Social Planner, and Blogs, so you learn it once.

How It Works For Your Business

- In an email template, click into a text block, click the Content AI button, and choose Generate with AI.
- Pick a content type and tone, type a short topic, and click Generate.
- Insert the draft or regenerate for a fresh version as often as you like.
- In Social Planner, start a New Post, pick the platform, and use Content AI for captions and images.
- In Blogs, build an outline first, then ask for the body from it.

Content AI for Writing – Tips & Guidelines

Tips

- Specific topics give better drafts than general ones.
- Thumbs feedback cannot be edited after you send it.
- Search for Content AI to see past results.
- Check prices, dates, and claims before you publish.

DO

- Select the text block first
- Choose the platform first for posts
- Outline blogs before the body
- Read and edit every draft

DON'T

- Send a first draft unread
- Type a vague topic
- Skip the outline for a blog
- Trust facts without checking

Workflow AI Assistant

What It Is

The Workflow AI Assistant is a chat helper inside the workflow builder. It explains your workflow in plain words and helps you build.

How It Works For Your Business

- Search for Workflows, open any workflow, and click the AI icon in the bottom-left corner.
- Click Describe this Workflow to get a plain explanation.
- Click Assist with Building for ideas to improve the workflow or add steps.
- Type a specific question and click suggested follow-ups if they appear.
- Use Clear Chat, Export Chat, and thumbs up or down near the chat.

Workflow AI Assistant – Tips & Guidelines

Tips

- Compare the explanation with the steps on screen.
- Ask specific questions, like which trigger fits a form fill.
- Clear the chat when you switch topics.
- An analytics screen and an SMS AI option exist for deeper use.

DO

- Describe workflows you did not build
- Ask about triggers and actions
- Export a chat for your records
- Rate answers with thumbs

DON'T

- Trust the explanation blindly
- Ask very general questions
- Mix topics in one chat
- Skip checking the steps

Reviews AI Agents

What It Is

Reviews AI Agents write replies to your reviews. You set a name, tone, and prompt, then choose which reviews each agent handles.

How It Works For Your Business

- Search for Reputation, open Settings, then the Reviews AI tab.
- Create Starter Agents or build one from scratch.
- Set the Agent Name, a Tone such as Friendly, Professional, or Empathetic, and a Prompt.
- Assign agents by review sentiment: Positive, Neutral, or Negative. Round Robin can share work.
- Use Language Detection with a Fallback Language, and assign agents to Google Business pages.

Reviews AI Agents – Tips & Guidelines

Tips

- Use Preview to see a response before it goes out.
- Clone an agent to make a variation fast.
- Use a calmer tone for negative reviews.
- Edit and Delete are available on each agent.

DO

- Preview before you rely on it
- Match tone to sentiment
- Set a fallback language
- Clone to test changes

DON'T

- Use one tone for every review
- Skip the Prompt field
- Delete before cloning
- Assign without checking pages

Funnel AI with Ask AI

What It Is

Ask AI can build a funnel for you. It asks guided questions, then creates pages you can open and edit in your funnel builder.

How It Works For Your Business

- Open Ask AI from the top bar and choose Generate Funnel.
- Pick a Lead Magnet Funnel or an Appointment Funnel.
- Answer the guided questions and upload your logo and images.
- Pick a Color Theme and apply your Brand Voice.
- Use the Builder link and page preview links, then search for Funnels to find the result.

Funnel AI with Ask AI – Tips & Guidelines

Tips

- Clear answers to the guided questions give better pages.
- Preview each page before you publish.
- Apply Brand Voice so the copy sounds like you.
- Generated pages are a starting point you can edit.

DO

- Choose the funnel type that fits
- Upload a clear logo
- Preview every page
- Edit the generated copy

DON'T

- Publish without previewing
- Skip the guided questions
- Use a blurry logo
- Treat the first result as final

Knowledge Base and Brand Voice

What It Is

A Knowledge Base stores the facts your AI may use. Brand Voice stores your writing style. Set both up once and your AI tools share them.

How It Works For Your Business

- Search for Knowledge Base and click Add Source.
- Choose File Upload, Tables, Rich Text, Google Drive, or a web URL crawl.
- Check the processing status, and set Auto Refresh to daily, weekly, or monthly.
- Re-sync Google Drive files after you change them.
- Attach the Knowledge Base to a Conversation AI bot or a Voice AI agent. Search for Brand Boards for Brand Voice.

Knowledge Base and Brand Voice – Tips & Guidelines

Tips

- Keep sources short, clear, and current.
- Auto Refresh keeps web and Drive content fresh.
- Select your Brand Voice in the Content AI panel and guided setups.
- Each bot and voice agent has its own Knowledge Base picker.

DO

- Add only facts you want shared
- Check processing finished
- Re-sync changed Drive files
- Set Brand Voice once

DON'T

- Upload outdated documents
- Forget to attach the source
- Add private data by accident
- Skip Brand Voice setup

Agent Logs and Metrics

What It Is

Agent Logs is a record of what your AI agents did. Use it to see exactly what happened when a customer says a bot said something strange.

How It Works For Your Business

- Search for Agent Logs, then open the Activity tab.
- Filter by Agent Name, AI Product, Channel, Status, or search for a contact.
- Read the columns: Timestamp, Agent Name, Agent ID, AI Product, Channel, and Status.
- Open a row to see the conversation timeline, then step details like model, latency, input, output, and prompt.
- On the Metrics tab, add, remove, resize, and rearrange widgets, then save a layout.

Agent Logs and Metrics – Tips & Guidelines

Tips

- Start with a filter to narrow a long list.
- Drill into step details to find where a reply went wrong.
- Save a Metrics layout you check often.
- Use logs to improve your prompt or Knowledge Base.

DO

- Filter before you scroll
- Drill into the timeline
- Save a useful layout
- Fix the prompt after checking

DON'T

- Guess what the bot said
- Skip the step details
- Rebuild before reading logs
- Ignore the Status column

AI Permissions by User

What It Is

Permissions decide what each team user can see and change in your AI tools. Set them per user so the right people manage the right agents.

How It Works For Your Business

- Search for Users and edit a user to open their permissions.
- Look for permissions for Conversation AI and Voice AI.
- Look for Manage Reviews AI Agents to control Reviews AI.
- A view-only user sees the screens but cannot change agents. A manage user can edit.
- Ask AI hides templates a user is not permitted to run.

AI Permissions by User – Tips & Guidelines

Tips

- Give manage access only to people who build agents.
- Use view-only for people who just need to check results.
- Review permissions when someone changes roles.
- Test by asking a user what they can see.

DO

- Give the least access needed
- Review permissions often
- Use view-only when it fits
- Test what a user sees

DON'T

- Give everyone manage access
- Set once and forget
- Share one login
- Guess what a user can edit

Key Terms Glossary

AI Employee

The bundle of all AI tools in your software

Conversation AI

A text bot that replies on channels like SMS and chat

Voice AI

A phone agent that answers and makes calls

Agent Studio

A flow-based builder for the steps an agent follows

Knowledge Base

Stored facts your AI is allowed to use

Agent Logs

A record of what your AI agents did

Content AI

A writing tool that drafts emails, posts, and blogs

Brand Voice

A saved style that makes AI writing sound like you

Pay-Per-Use

A plan where you pay only when AI does work

Fair use

A rule that can slow an account using far beyond normal

Sentiment

Whether a review is positive, neutral, or negative

Regenerate

Ask the AI for a fresh version of a draft

Getting Help

Your software changes over time, so buttons, menu names, and options may look a little different from what you see here. If something does not match, check the in-app help for that AI tool or ask whoever manages your account.