

# Agent Requirements

## User Actions:

- Agent should return a structured JSON for to be handled by the flask app for performing actions within the dashboard
  - Ex. Add customer, create invoice, create event etc.
  - The agent should ask the user for missing fields if not provided
- All actions
  - create\_contact
  - read\_all\_contacts
  - update\_contact
  - create\_invoice
  - read\_invoice
  - update\_invoice
  - mark\_invoice\_paid
  - create\_revenue
  - create\_expense
  - create\_event
  - list\_upcoming\_events
  - log\_interaction
  - read\_interactions
  - send\_email
  - generate\_report

## User Insights:

- Agent should respond to users questions about their business using their own data stored within the app.
- Example:
  - How many unpaid invoices do I have?
  - What was my biggest expense last month?

## Generating Reports:

- Agent should be able generate business reports based on the users data
  - Generate a profit loss report for the last quarter.