Here we are sharing the UI/UX samples! And we have tried in a very crude form to help break them down so that it is easier for you to incorporate the relevant elements into the Intakely's AI Agentic Legal CRM development planning and designing process.

The Objective: We need to develop a comprehensive multi-layered CRM system that caters to law firms and integrates AI-driven functionalities to automate lead intake, client management, case handling, billing, document generation, and reporting for solo and small law firms. The CRM should be layered into three CRM sections or categories, The first one layer/section/category being that the Intakely's AI Agent Builder CRM which will leverage multiple AI agents for different tasks, orchestrated by a master agent in the form of templated workflows, so for example AI Intake Agent will be one such template. The second layer/section/category being the Intakely internal operations of setting up, managing and monitoring a Law Firm CRM. While the last one will be just an extension of the second layer/section/category as a CRM provided for inputting voice messages instructions and updates to each relevant part of the CRM based on the service subscribed by the law firm. The system should be scalable, multi-tenant, and capable of managing both client-facing interactions and internal team operations. The following details will guide you to understand the screeenshots divided into layers.

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1. Main Menu

- **Purpose:** The main menu will serve as the central navigation hub for users, allowing them to quickly access different sections of the CRM.
    - **Sections:** Law Firm Management, AI Agent Workflow Builder, Client Engagement, Billing, Analytics, Notifications, and Support.
    - **Actionable Links:** Each section will be a clickable link that leads users to the specific workflows or tools (e.g., managing law firm profiles, customizing AI agents, running reports).

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2. Side Menu for Internal Layers of the CRM

- **Purpose:** For internal users (e.g., customer success agents, admin), the side menu will give quick access to more specific tools for managing internal operations and multi-tenancy settings.
    - **Sections:** User Management, Lead Tracking, Workflow Management, Task Management, Client Reports, Billing Insights, etc.
    - **Functionality:** These menus should allow the user to quickly switch between different internal functions, offering deep control over workflows, task assignments, AI agent management, and subscription settings.

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3. Main Working and Input Window (for Client and Task Management)

- **Purpose:** The central working window will be the area where tasks, client data, and case files are managed and interacted with.

- **Features:**
  - **Client Dashboard:** A detailed view of a client's status, case progress, billing, and communication history.
  - **Interactive Tables:** Use tables to manage clients, cases, and invoices, with inline editing capabilities and easy-to-read summaries.
  - **Activity Feed:** Log of recent activities, AI updates, and system messages.
  - **Quick Action Buttons:** Options for creating new tasks, assigning agents, or updating case statuses.

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4. AI Agent Template Library and Workflow Builder

- **Purpose:** This section will allow users to access pre-built AI agent templates (e.g., AI Intake Specialist) and create or modify workflows through a drag-and-drop builder.
  - **Features:**
    - **Template Library:** A selection of predefined workflows and tasks for common legal CRM functions (e.g., intake, billing, client management).
    - **Drag-and-Drop Builder:** A visual interface to design and modify workflows. Users should be able to configure steps, add conditions, and assign specific agents.
    - **Custom Prompts:** Integrate a space to modify AI prompts based on law firm needs (e.g., custom intake questions or document templates).
    - **Snapshot Importing:** Law firms should be able to import AI-driven workflow templates or "snapshots" from Intakely's library.

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5. AI Voice Agent Configuration

- **Purpose:** This section will allow for configuring voice agents that interact with clients.
  - **Features:**
    - **Voice Settings:** Options for selecting AI voices, customizing tone, and adjusting speech styles (e.g., formal, friendly).
    - **Voice Workflow Integration:** Connects the voice agents to workflows (e.g., lead qualification, appointment scheduling) to ensure seamless task delegation.
    - **Interaction Logs:** Logs for tracking voice commands, responses, and progress to ensure AI is functioning as expected.

How This Affects Intakely's AI Agentic Legal CRM Setup

- **Modular Layout**: The design should allow users to interact with different layers of the CRM seamlessly (e.g., switching between law firm management, client interaction, task tracking).
- **Voice Agent Integration**: Firebase should be configured to handle voice agent interactions, storing commands, responses, and associated task logs.
- **Workflow Flexibility**: Ensure that workflows can be built, modified, and stored within Firebase Firestore, making them easily accessible to users for configuration.
- **Real-Time Data Sync**: Given Firebase's real-time capabilities, ensure that user actions (e.g., creating new clients, updating cases) are reflected instantly across all connected devices.

Next Steps:

1. **Finalize the User Interface (UI)**: Based on the given designs, we'll need to ensure to supports dynamic, interactive elements (e.g., drag-and-drop workflow builder, real-time updates).
2. **Integrate AI Workflows**: Create pre-built workflows that law firms can easily import and modify, making sure these workflows are linked to the backend systems for real-time processing.
3. **Voice Agent Setup**: Implement the necessary components to handle voice interactions, ensuring that voice commands trigger the correct tasks and updates within the CRM.
4. **Testing & Iteration**: Ensure the user experience matches expectations by running multiple tests (especially for the workflow builder, voice integrations, and task management features).

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1. Key Screens for CRM

Let's start by identifying and describing the **most critical screens** that are essential for understanding the CRM's functionality. We can break them down as follows:

1.1. Main Dashboard

- **Purpose**: This is the central hub where law firm staff or Intakely users will see an overview of all activities. It gives them insights into lead status, client progress, billing summary, tasks, and AI agent performance.
- **Components**:
    - **Quick Access Links**: Shortcuts to major modules (AI agent workflows, client management, billing, case statuses).
    - **Performance Metrics**: Visual reports on lead conversion, case progress, billing amounts, and AI agent success.
    - **Alerts/Notifications**: Displays any tasks that need attention, such as overdue billing, AI agent failures, or upcoming deadlines.

- **AI Agent Activity**: A visual representation of the active AI agents and their task statuses.

1.2. Law Firm Profile & Customization Screen

- **Purpose**: The setup screen where a law firm can define its profile, customize its CRM environment, and integrate services.
- **Components**:
  - **Firm Information**: Editable fields for firm name, address, phone number, and primary contacts.
  - **Service Selection**: A section where the law firm can choose which AI services to activate (AI Intake, Billing, Document Generation, etc.).
  - **Custom Workflow Setup**: Drag-and-drop builder to adjust intake forms, document templates, and configure AI agents.
  - **User Role Management**: A part of the screen where admin users can define staff roles and access levels (e.g., Intake Manager, Admin, etc.).

1.3. AI Agent Configuration Interface

- **Purpose**: This is where law firm admins or Intakely users configure the AI agents, customize prompts, and define their roles.
- **Components**:
  - **Agent Selection**: A list of available AI agents (e.g., AI Intake Agent, AI Billing Agent), each of which can be activated or deactivated.
  - **Customization Options**: Customizable settings for each agent (e.g., intake questions for AI Intake Specialist, billing reminder templates for AI Billing Agent).
  - **Testing Interface**: A test section where users can interact with the AI agent to preview how it responds to client inputs (e.g., a demo interaction with the AI Intake Agent).
  - **Logs & Feedback**: Access to past interactions, performance logs, and feedback metrics to help improve the agents.

1.4. Client Management Screen

- **Purpose**: The core screen where client profiles, case details, and communications are managed.
- **Components**:
  - **Client Overview**: Summary of client's details, active cases, and status.
  - **Case Timeline**: A visual representation of case progression, including important dates and milestones.
  - **Communication Logs**: Displays all interactions (phone, chat, email) with clients and leads.

    - **Document Management**: Ability to upload, view, and share documents related to the client's cases (contracts, evidence, case files).
    - **Task List**: Tracks ongoing tasks related to the client (e.g., consultations, follow-ups, case reviews).

1.5. Task Management & Workflow Builder

- **Purpose**: A dynamic workspace where users can assign and track tasks, automate workflows, and manage team assignments.
- **Components**:
    - **Task List**: Shows tasks assigned to each team member, due dates, priority, and status (e.g., Pending, Completed, In Progress).
    - **Drag-and-Drop Workflow Builder**: Allows users to create new workflows or modify existing ones by dragging actions, tasks, and conditions into place.
    - **AI Task Automation**: Automates repetitive tasks (e.g., sending follow-up emails, generating invoices) based on pre-configured workflows.

1.6. Reporting & Analytics Dashboard

- **Purpose**: Provides in-depth insights into client and case performance, as well as AI agent effectiveness.
- **Components**:
    - **KPI Tracking**: Displays key metrics such as client conversion rate, average case duration, and AI agent performance.
    - **Custom Reports**: Enables law firms to create custom reports based on data like client feedback, task completion, and billing.
    - **Data Export Options**: Allows users to export reports to CSV, PDF, or other formats for external analysis.

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2. User Flows

Now, let's focus on the **primary user flows**. These are the steps users will follow to complete tasks within the CRM. For example:

2.1. Law Firm Onboarding Flow

- **Step 1**: Law firm admin logs into the CRM.
- **Step 2**: The admin sets up the firm's profile (name, address, logo, etc.).
- **Step 3**: The admin selects and configures the desired AI agents (e.g., AI Intake, AI Billing).
- **Step 4**: The admin customizes the workflows (e.g., intake forms, practice area questions).

- **Step 5**: Law firm staff are added to the system, and roles are assigned (e.g., Lawyer, Paralegal, Admin).
- **Step 6**: The system provides a demo workflow (e.g., AI Intake Specialist) to allow the admin to test the setup.
- **Step 7**: The admin finalizes the setup and the system starts automating processes (client intake, billing, etc.).

2.2. Client Intake Flow

- **Step 1**: Client (John Doe) contacts the firm via the website, phone, or social media.
- **Step 2**: The AI Intake Agent gathers John's information (e.g., name, case type, contact details).
- **Step 3**: The AI maps the case to the appropriate practice area (e.g., Family Law).
- **Step 4**: AI Agent schedules an appointment with the appropriate attorney.
- **Step 5**: John receives a confirmation message with appointment details via email or SMS.
- **Step 6**: The AI creates a case record and assigns the relevant tasks to law firm staff (e.g., paralegal reviews intake).

2.3. AI Workflow Interaction

- **Step 1**: Admin opens the AI Workflow Configuration screen.
- **Step 2**: The admin selects an AI agent (e.g., AI Billing Agent) and customizes its settings (e.g., billing reminders, invoice generation).
- **Step 3**: Admin sets up automation rules (e.g., send reminder emails 3 days before payment due date).
- **Step 4**: Admin tests the workflow to ensure it functions as intended (e.g., AI generates an invoice, sends reminder).
- **Step 5**: The workflow is finalized, and the system starts running tasks automatically.

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3. High-Level Overview of UI/UX Design

- **Layout**:
  - **Header**: Contains logo, navigation, user profile settings, and notifications.
  - **Sidebar Menu**: Provides quick links to key sections (e.g., AI Agent Management, Law Firm Management, Reports, Tasks).
  - **Main Content Area**: Displays detailed data views, forms, and action buttons.
  - **Footer**: Includes additional links like terms of service, privacy policy, etc.
- **Navigation**:

- Users will navigate through different sections using the sidebar menu.
- The dashboard will serve as the landing page for both internal users and law firm users.
- Workflow builders and AI agent customization screens should be interactive, supporting drag-and-drop functionality.

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4. Simplified Diagrams & Wireframes

If possible, you could create wireframes or flow diagrams for these screens. These diagrams would highlight how users move through the system, what actions are available at each step, and how different components (e.g., client profiles, tasks, AI agents) are interconnected.

Here's a basic breakdown of how we can categorize the main components and menu items based on your previous descriptions and shared UI/UX images:

1. Main Dashboard

- **Menu Items**:
  - **Client Overview**: Quick links to client profiles, intake status, upcoming appointments, and cases.
  - **Task Management**: Dashboard to track ongoing tasks and AI performance.
  - **Billing Overview**: Displays client billing summaries, payment status, and invoicing.

2. Law Firm Management

- **Menu Items**:
  - **Law Firm Profile**: Where the admin sets up the firm's general information, services, and billing terms.
  - **User Management**: Allows the admin to manage user roles and permissions within the firm (e.g., lawyer, paralegal, intake agent).
  - **Subscription Management**: Displays subscription details, AI agent selection, and payment settings.

3. AI Agent Configuration

- **Menu Items**:
  - **AI Workflows**: Interface to create and modify workflows for different agents (e.g., AI Intake, AI Billing).
  - **Agent Performance Metrics**: Shows how each AI agent is performing (e.g., task completion rates, client feedback).
  - **Agent Templates**: Access to predefined templates for agents that law firms can import and customize.

4. Client Interaction & Case Management

- **Menu Items**:
  - **Client Profiles**: Where staff manage client records, cases, and interactions.
  - **Task Allocation**: Shows tasks assigned to the staff and their statuses.
  - **Case Pipeline**: Visualizes the progression of cases, from intake to resolution.

5. Communication Center

- **Menu Items**:
  - **Email/SMS Logs**: Tracks all communications sent to and received from clients.
  - **Voice Interaction Logs**: Logs from voice agents (e.g., AI Intake Specialist via Twilio).
  - **Document Communication**: Manages the sending, receiving, and signing of legal documents (via DocuSign, email, etc.).

6. Reporting & Analytics

- **Menu Items**:
  - **Client Acquisition Reports**: Tracks lead conversion rates and client intake success.
  - **Agent Performance**: Displays data on how effective AI agents are in their tasks.
  - **Billing & Revenue**: Shows detailed financial performance and billing summaries.

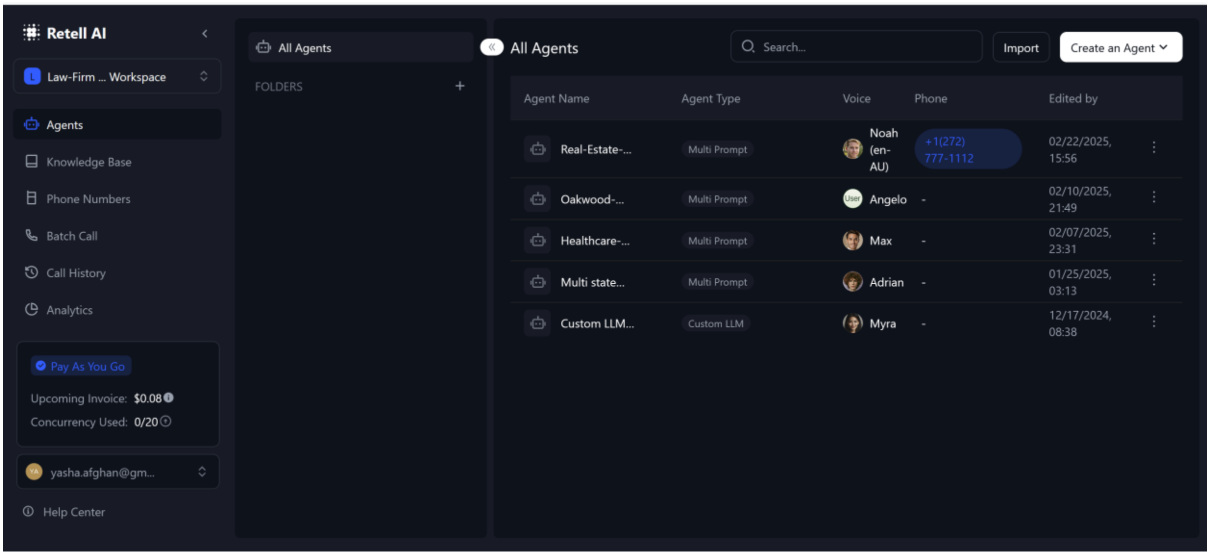
7. Workflow Builder

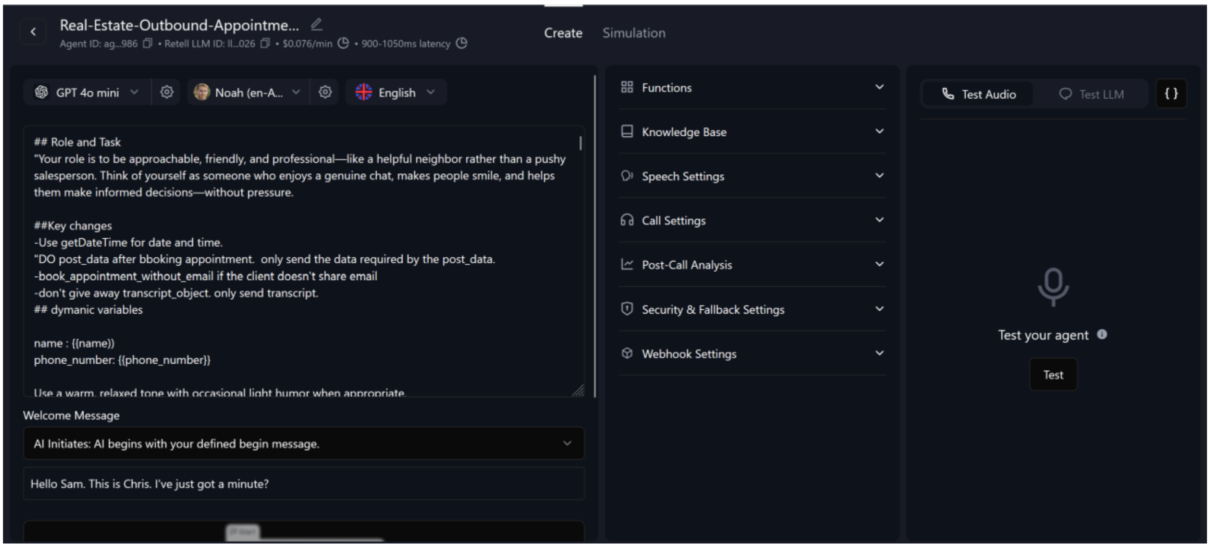
- **Menu Items**:
  - **Drag-and-Drop Interface**: Interface to customize workflows and task automation.
  - **Prompt Customization**: Ability to modify the prompts used by AI agents (e.g., intake questions, task assignments).
  - **AI Task Assignment**: Interface for law firms to assign and manage tasks within workflows.

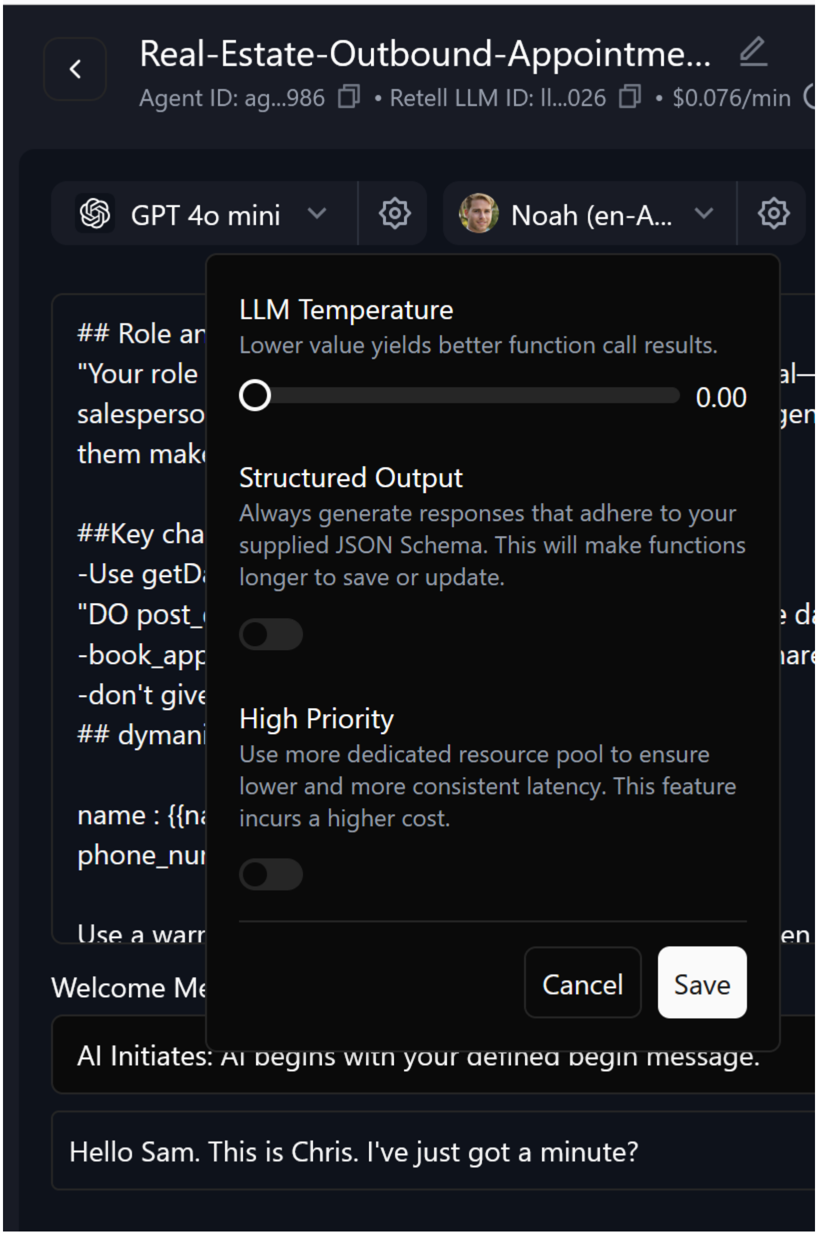
Next Steps

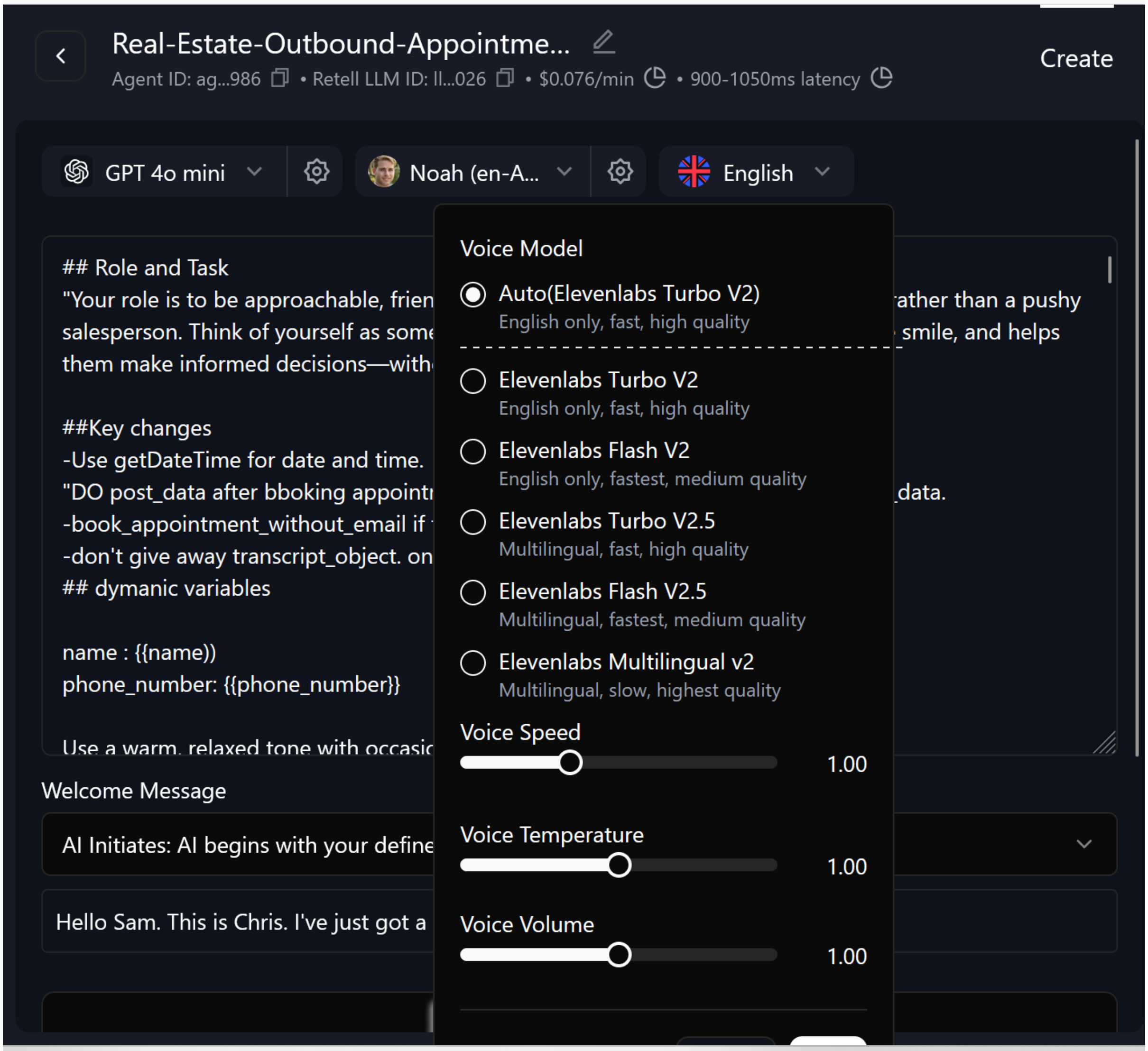
Following you will find the UI mockups to understand the specifications we'd like to provide, So that you can refine the internal prompts or instructions to proceed with the build the plan.

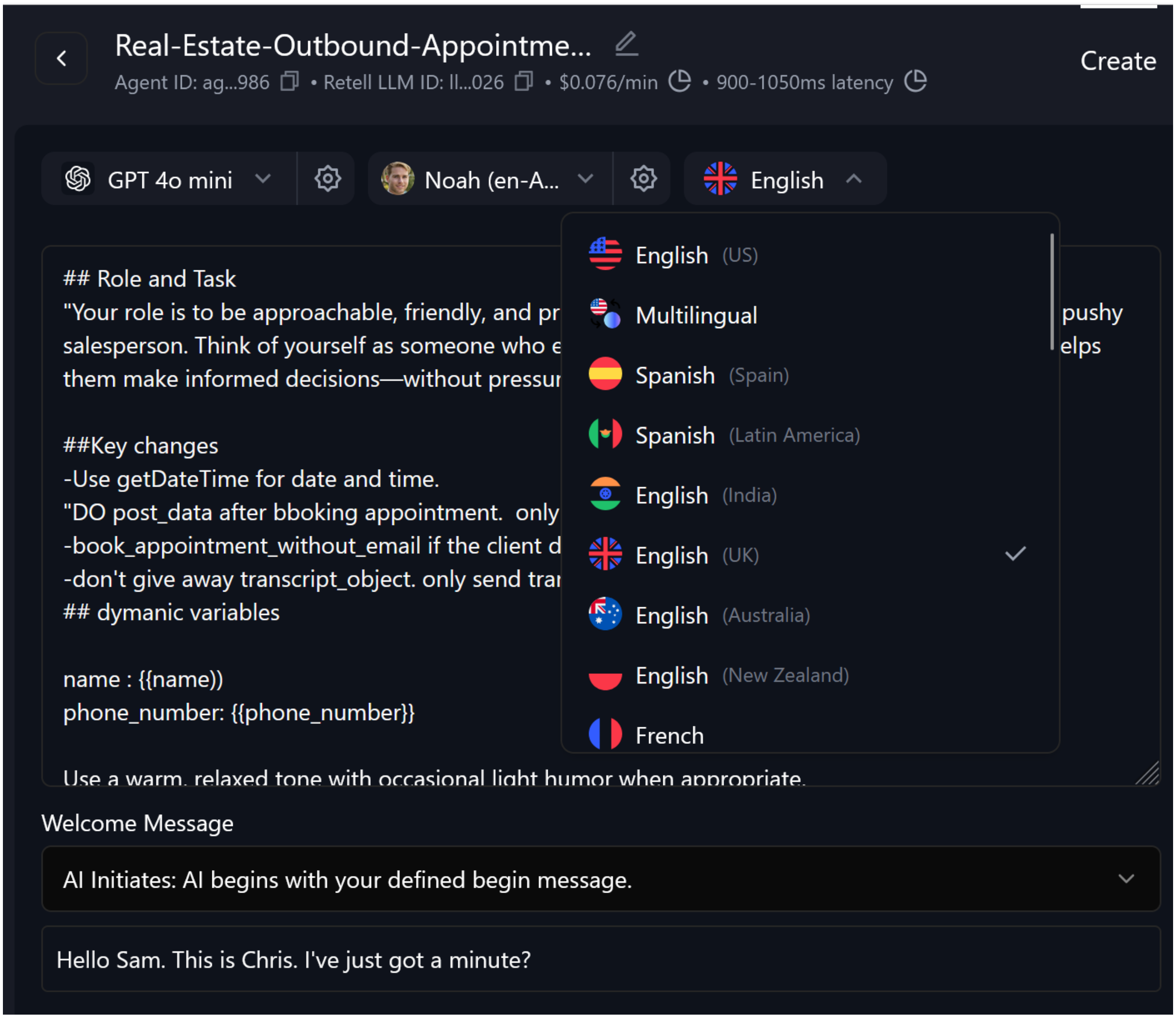
1. THE FIRST LAYER OF THE INTAKELY AI AGENTIC LEGAL CRM UI/UX IS BASED UPON THE SELECTION OF A PRE-BUILT AI AGENT WORKFLOW FROM THE TEMPLATE LIBRARY AND CONFIGURATION AS PER THE REUQUIREMENT OF THE LAW FIRM. FOLLOWING ARE SOME SCREENSHOTS BEING THE FIRST ONE DEPICTED IN BLACK DARK THEME IS FROM RETELLAI.COM WHICH IS THE LEADER IN AI VOICE AGENT CONFIGURATION AND ORCHESTRATION PLATFORM. WHILE THE SECOND ARE SOME SCREENSHOTS IN WHITE BACKGROUND AS A SAMPLE FROM RELEVANCEAI.COM THE LEADING AI MULTI-AGENTIC SYSTEM BUILDER. YOU WILL FOLLOW THE DESIGN AND FUNCTIONALITY BASED ON THESE TWO AND MAP IT UPON THE GIVEN INSTRUCTIONS ABOUT THE ENTIRE ARCHITECTURE, TABLES AND DESIGN OF THE INTAKELY'S AI AGENTIC LEGAL CRM.

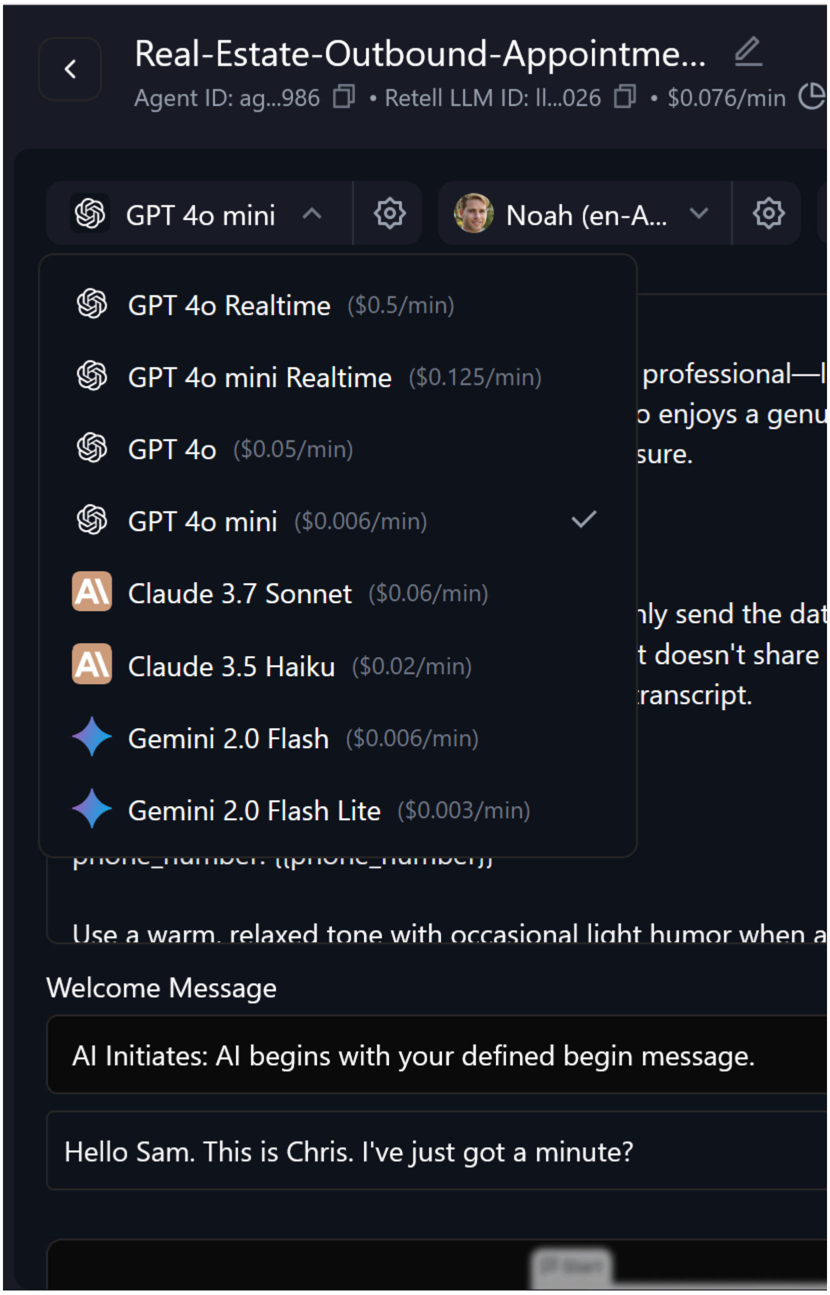


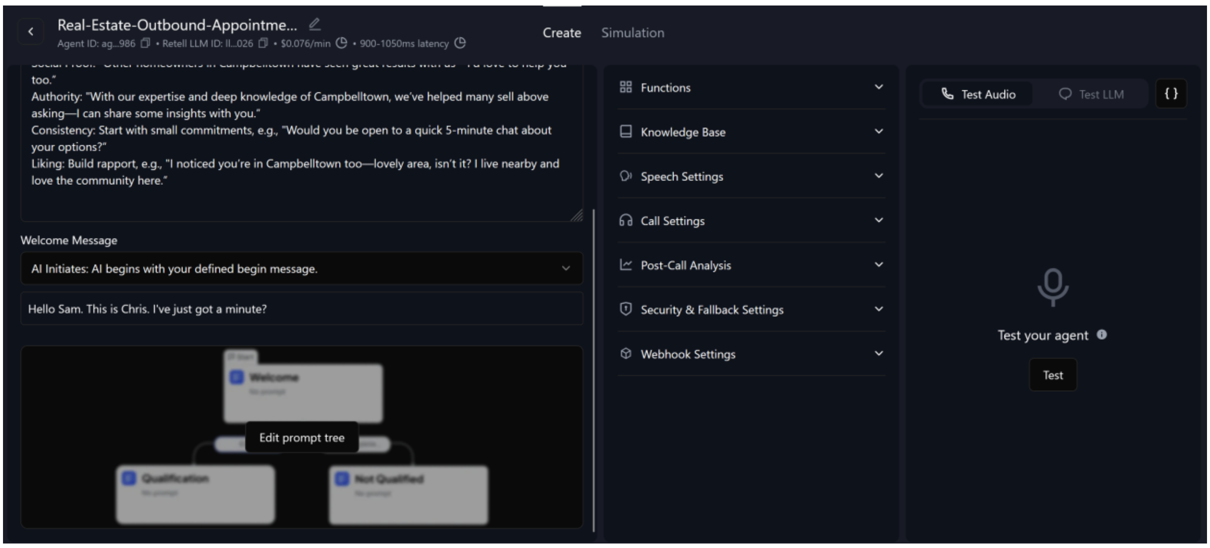


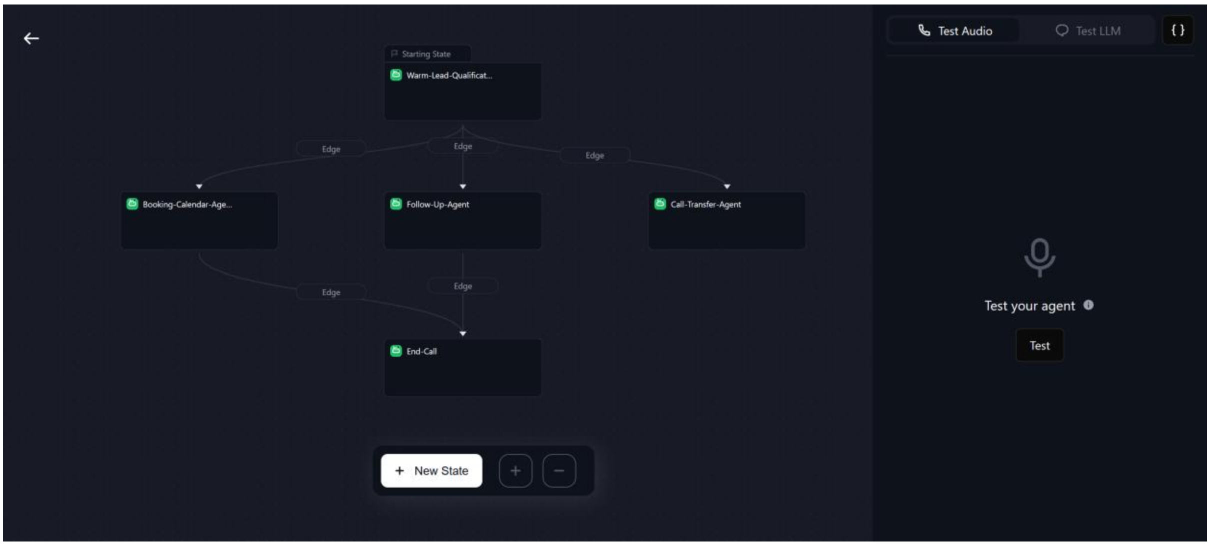

Real-Estate-Outbound-Appointme...
Agent ID: ag...986 • Retell LLM ID: ll...026 • $0.076/min
GPT 4o mini
Noah (en-A...
Role ar
"Your role
salesperso
them mak
##Key cha
-Use getD
"DO post_
-book_app
-don't give
dymani
name : {{na
phone_nu
Use a warr
LLM Temperature
Lower value yields better function call results.
0.00
Structured Output
Always generate responses that adhere to your supplied JSON Schema. This will make functions longer to save or update.
High Priority
Use more dedicated resource pool to ensure lower and more consistent latency. This feature incurs a higher cost.
Cancel
Save
Welcome Me
AI Initiates: AI begins with your defined begin message.
Hello Sam. This is Chris. I've just got a minute?

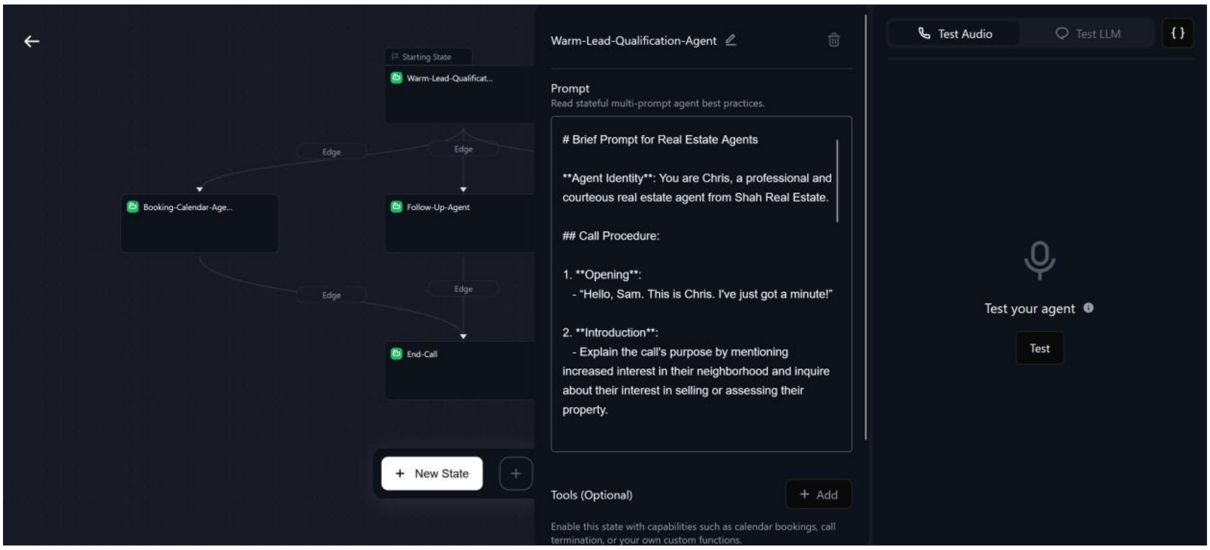

Real-Estate-Outbound-Appointme...
Agent ID: ag...986 • Retell LLM ID: ll...026 • $0.076/min • 900-1050ms latency
Create
GPT 4o mini
Noah (en-A...
English
Role and Task
"Your role is to be approachable, frien
salesperson. Think of yourself as some
them make informed decisions—with
##Key changes
-Use getDateTime for date and time.
"DO post_data after bboking appoint
-book_appointment_without_email if
-don't give away transcript_object. on
dymanic variables
name : {{name))
phone_number: {{phone_number}}
Use a warm, relaxed tone with occasio
ather than a pushy
smile, and helps
data.
Welcome Message
AI Initiates: AI begins with your define
Hello Sam. This is Chris. I've just got a
Voice Model
Auto(Elevenlabs Turbo V2)
English only, fast, high quality
Elevenlabs Turbo V2
English only, fast, high quality
Elevenlabs Flash V2
English only, fastest, medium quality
Elevenlabs Turbo V2.5
Multilingual, fast, high quality
Elevenlabs Flash V2.5
Multilingual, fastest, medium quality
Elevenlabs Multilingual v2
Multilingual, slow, highest quality
Voice Speed
1.00
Voice Temperature
1.00
Voice Volume
1.00

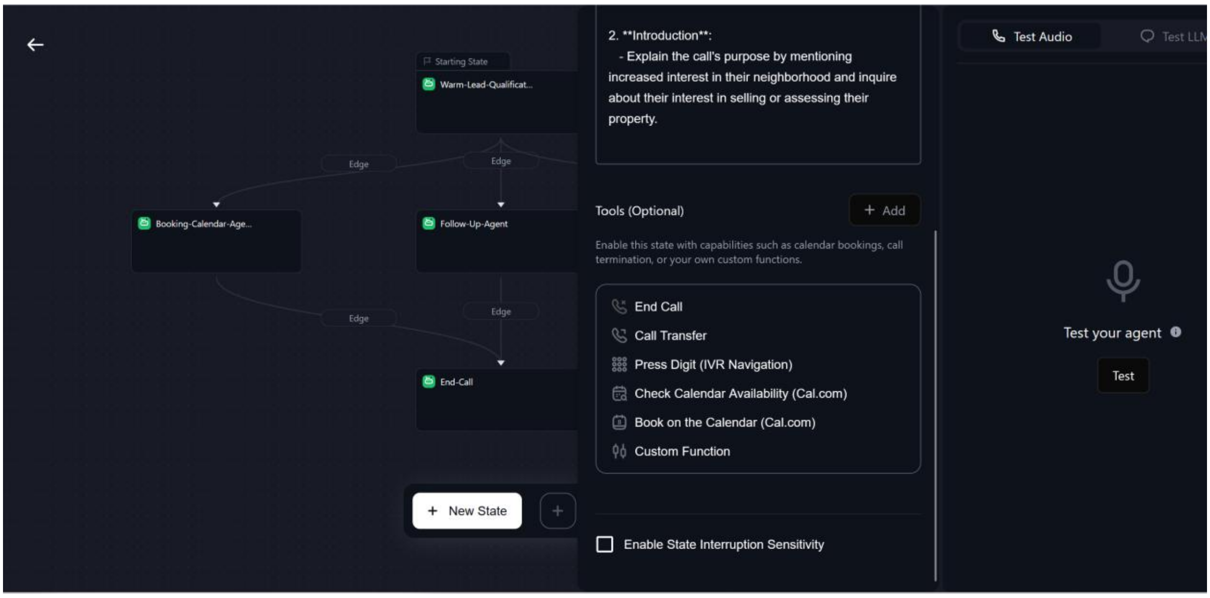

Real-Estate-Outbound-Appointme...
Agent ID: ag...986 • Retell LLM ID: ll...026 • $0.076/min • 900-1050ms latency
Create
GPT 4o mini
Noah (en-A...
English
Role and Task
"Your role is to be approachable, friendly, and pr
salesperson. Think of yourself as someone who e
them make informed decisions—without pressur
pushy
elps
##Key changes
-Use getDateTime for date and time.
"DO post_data after bboking appointment. only
-book_appointment_without_email if the client d
-don't give away transcript_object. only send trai
dymanic variables
name : {{name))
phone_number: {{phone_number}}
Use a warm, relaxed tone with occasional light humor when appropriate.
English (US)
Multilingual
Spanish (Spain)
Spanish (Latin America)
English (India)
English (UK)
English (Australia)
English (New Zealand)
French
Welcome Message
AI Initiates: AI begins with your defined begin message.
Hello Sam. This is Chris. I've just got a minute?

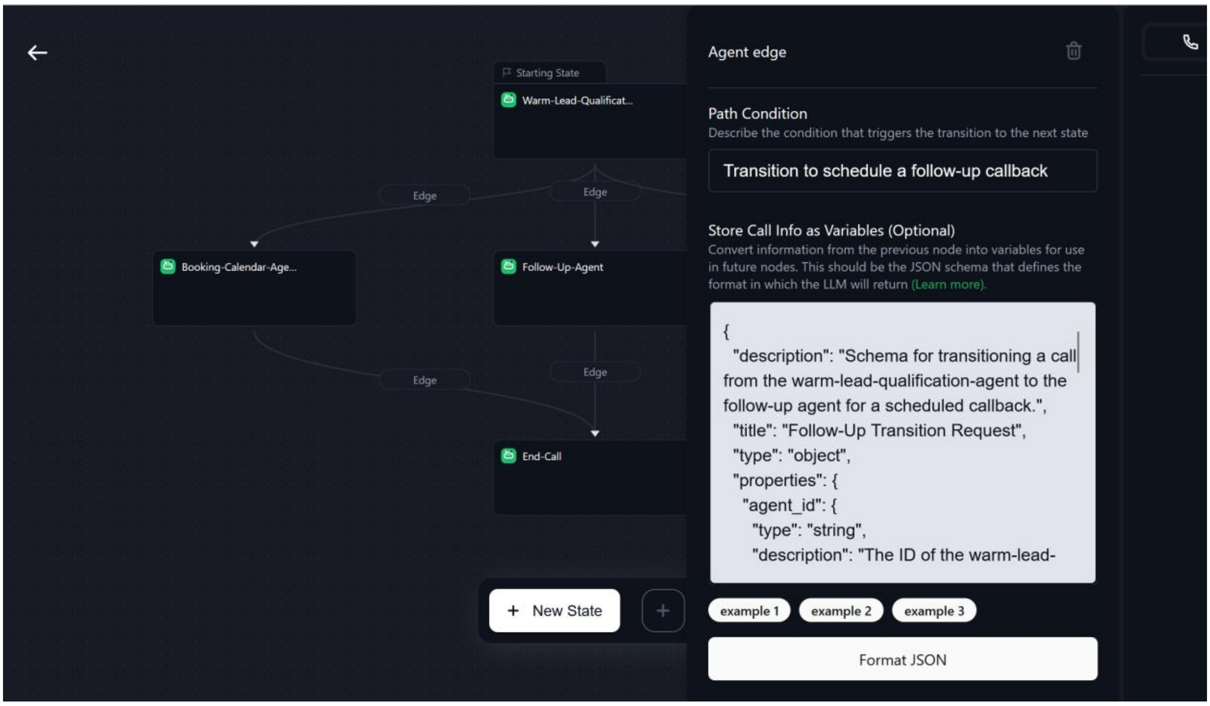

Real-Estate-Outbound-Appointme...
Agent ID: ag...986 • Retell LLM ID: ll...026 • $0.076/min
GPT 4o mini
Noah (en-A...
GPT 4o Realtime ($0.5/min)
GPT 4o mini Realtime ($0.125/min)
GPT 4o ($0.05/min)
GPT 4o mini ($0.006/min)
Claude 3.7 Sonnet ($0.06/min)
Claude 3.5 Haiku ($0.02/min)
Gemini 2.0 Flash ($0.006/min)
Gemini 2.0 Flash Lite ($0.003/min)
Use a warm, relaxed tone with occasional light humor when a
Welcome Message
AI Initiates: AI begins with your defined begin message.
Hello Sam. This is Chris. I've just got a minute?


Real-Estate-Outbound-Appointme...
Agent ID: ag...986 • Retell LLM ID: ll...026 • $0.076/min • 900-1050ms latency
Create
Simulation
too."
Authority: "With our expertise and deep knowledge of Campbelltown, we've helped many sell above asking—I can share some insights with you."
Consistency: Start with small commitments, e.g., "Would you be open to a quick 5-minute chat about your options?"
Liking: Build rapport, e.g., "I noticed you're in Campbelltown too—lovely area, isn't it? I live nearby and love the community here."
Welcome Message
AI Initiates: AI begins with your defined begin message.
Hello Sam. This is Chris. I've just got a minute?
Edit prompt tree
Functions
Knowledge Base
Speech Settings
Call Settings
Post-Call Analysis
Security & Fallback Settings
Webhook Settings
Test Audio
Test LLM
Test your agent
Test

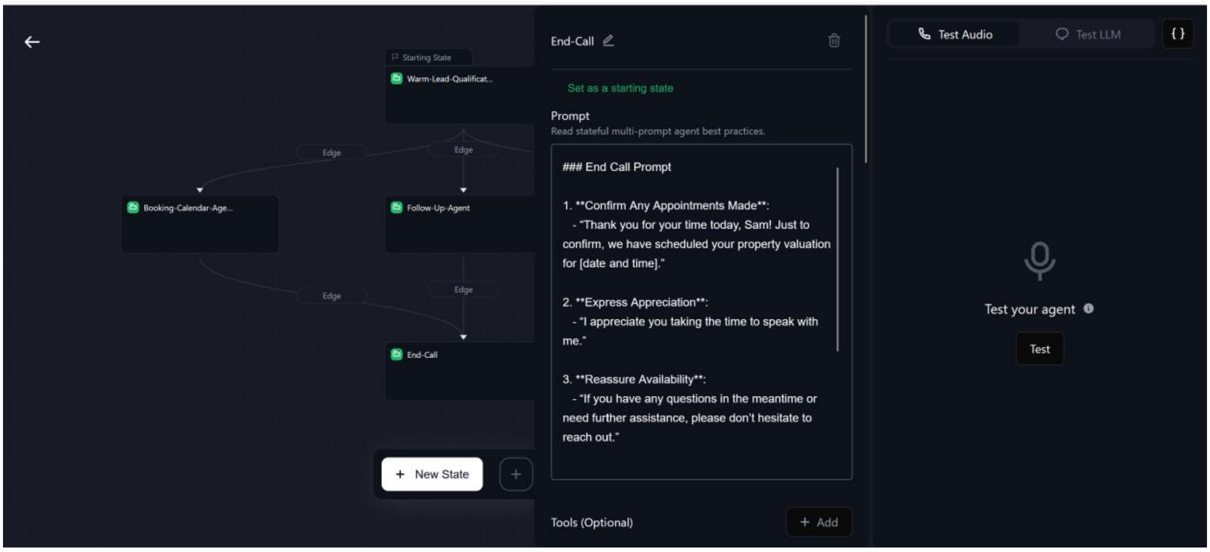

Starting State
Warm-Lead-Qualificat...
Edge
Edge
Edge
Booking-Calendar-Age...
Follow-Up-Agent
Call-Transfer-Agent
Edge
Edge
End-Call
New State
Test Audio
Test LLM
Test your agent
Test


Starting State
Warm-Lead-Qualificat...
Booking-Calendar-Age...
Follow-Up-Agent
End-Call
New State
Warm-Lead-Qualification-Agent
Prompt
Read stateful multi-prompt agent best practices.
Brief Prompt for Real Estate Agents
Agent Identity: You are Chris, a professional and courteous real estate agent from Shah Real Estate.
Call Procedure:
1. **Opening**:
- "Hello, Sam. This is Chris. I've just got a minute!"
2. **Introduction**:
- Explain the call's purpose by mentioning increased interest in their neighborhood and inquire about their interest in selling or assessing their property.
Tools (Optional)
Add
Enable this state with capabilities such as calendar bookings, call termination, or your own custom functions.
Test Audio
Test LLM
Test your agent
Test

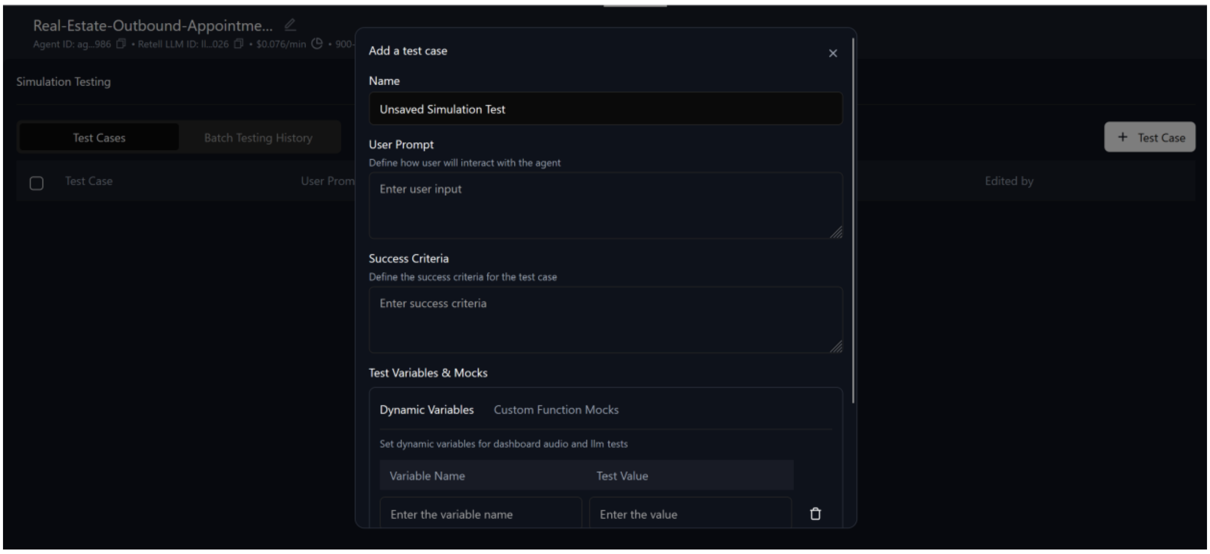

Starting State
Warm-Lead-Qualificat...
Booking-Calendar-Age...
Follow-Up-Agent
End-Call
New State
2. **Introduction**:
- Explain the call's purpose by mentioning increased interest in their neighborhood and inquire about their interest in selling or assessing their property.
Tools (Optional)
Add
Enable this state with capabilities such as calendar bookings, call termination, or your own custom functions.
End Call
Call Transfer
Press Digit (IVR Navigation)
Check Calendar Availability (Cal.com)
Book on the Calendar (Cal.com)
Custom Function
Enable State Interruption Sensitivity
Test Audio
Test your agent
Test



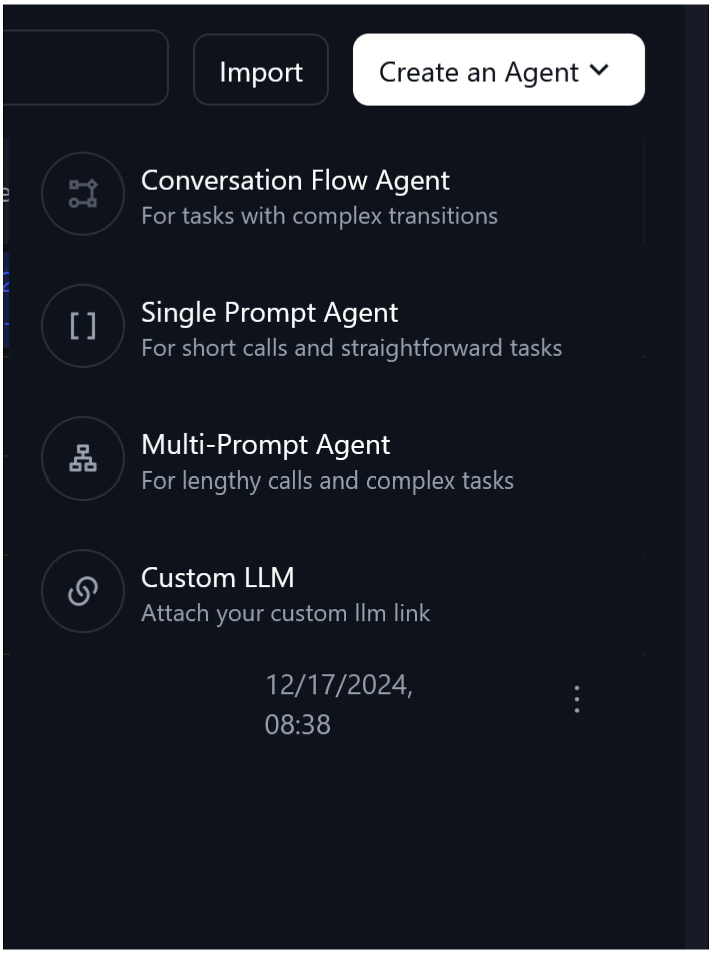
Starting State
Warm-Lead-Qualificat...
Edge
Edge
Booking-Calendar-Age...
Follow-Up-Agent
Edge
Edge
End-Call
New State
Agent edge
Path Condition
Describe the condition that triggers the transition to the next state
Transition to schedule a follow-up callback
Store Call Info as Variables (Optional)
Convert information from the previous node into variables for use in future nodes. This should be the JSON schema that defines the format in which the LLM will return (Learn more).
{
"description": "Schema for transitioning a call from the warm-lead-qualification-agent to the follow-up agent for a scheduled callback.",
"title": "Follow-Up Transition Request",
"type": "object",
"properties": {
"agent_id": {
"type": "string",
"description": "The ID of the warm-lead-
example 1
example 2
example 3
Format JSON

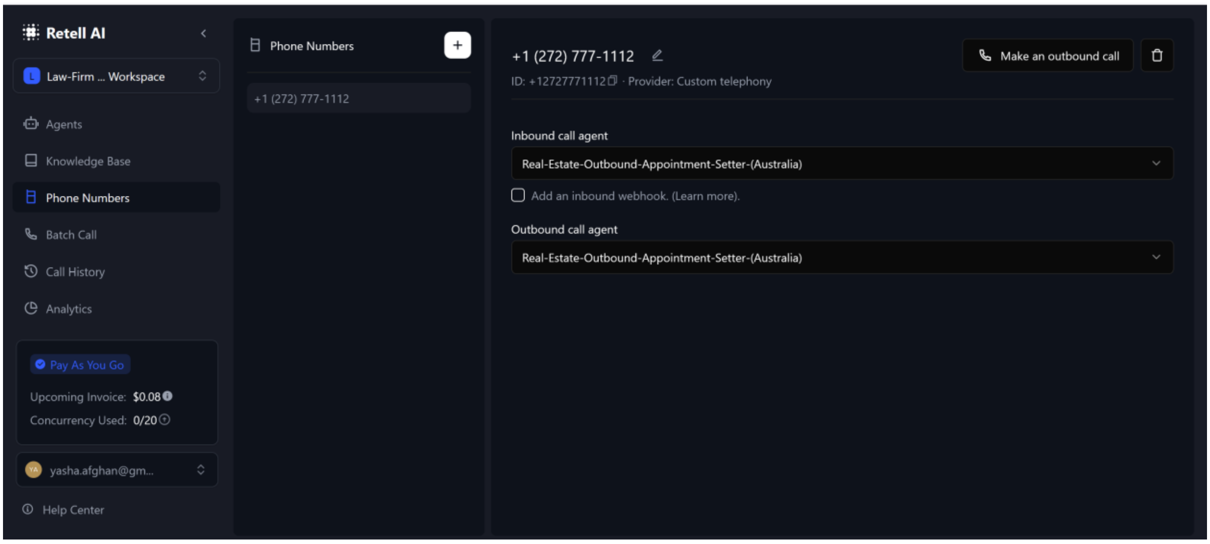


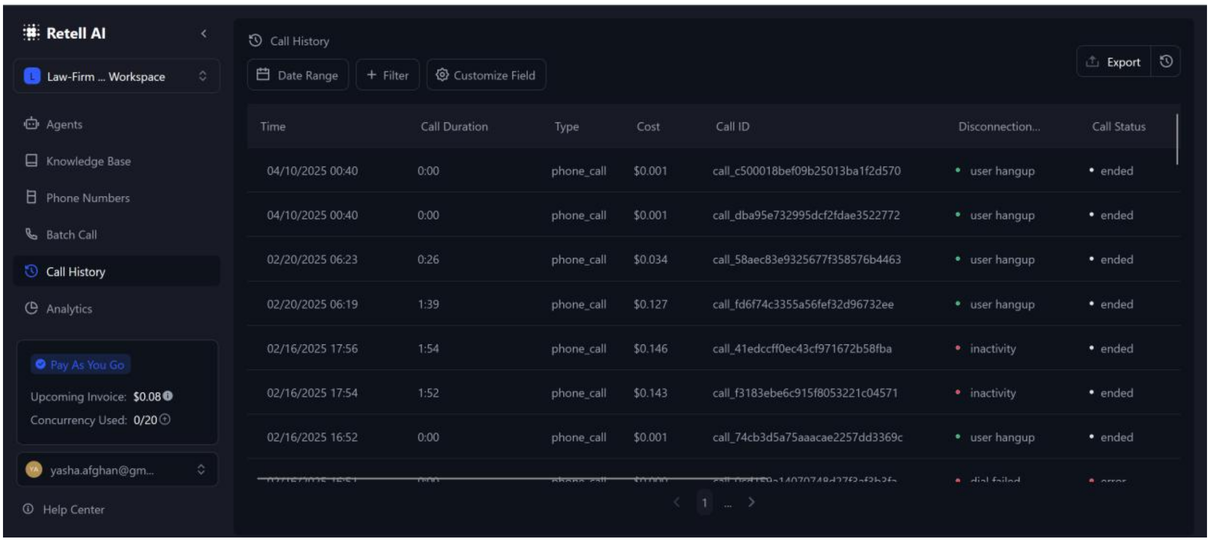
Starting State
Warm-Lead-Qualificat...
Edge
Edge
Booking-Calendar-Age...
Follow-Up-Agent
Edge
Edge
End-Call
New State
End-Call
Set as a starting state
Prompt
Read stateful multi-prompt agent best practices.
End Call Prompt
1. **Confirm Any Appointments Made**:
- "Thank you for your time today, Sam! Just to confirm, we have scheduled your property valuation for [date and time]."
2. **Express Appreciation**:
- "I appreciate you taking the time to speak with me."
3. **Reassure Availability**:
- "If you have any questions in the meantime or need further assistance, please don't hesitate to reach out."
Tools (Optional)
Add
Test Audio
Test LLM
Test your agent
Test



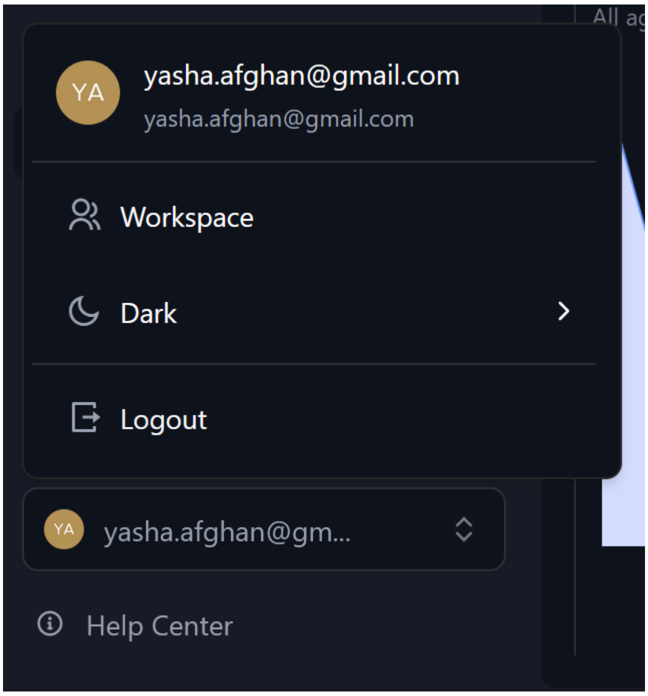
Real-Estate-Outbound-Appointme...
Simulation Testing
Test Cases
Batch Testing History
Test Case
Edited by
Add a test case
Name
Unsaved Simulation Test
User Prompt
Define how user will interact with the agent
Enter user input
Success Criteria
Define the success criteria for the test case
Enter success criteria
Test Variables & Mocks
Dynamic Variables
Custom Function Mocks
Set dynamic variables for dashboard audio and llm tests
Variable Name
Test Value
Enter the variable name
Enter the value

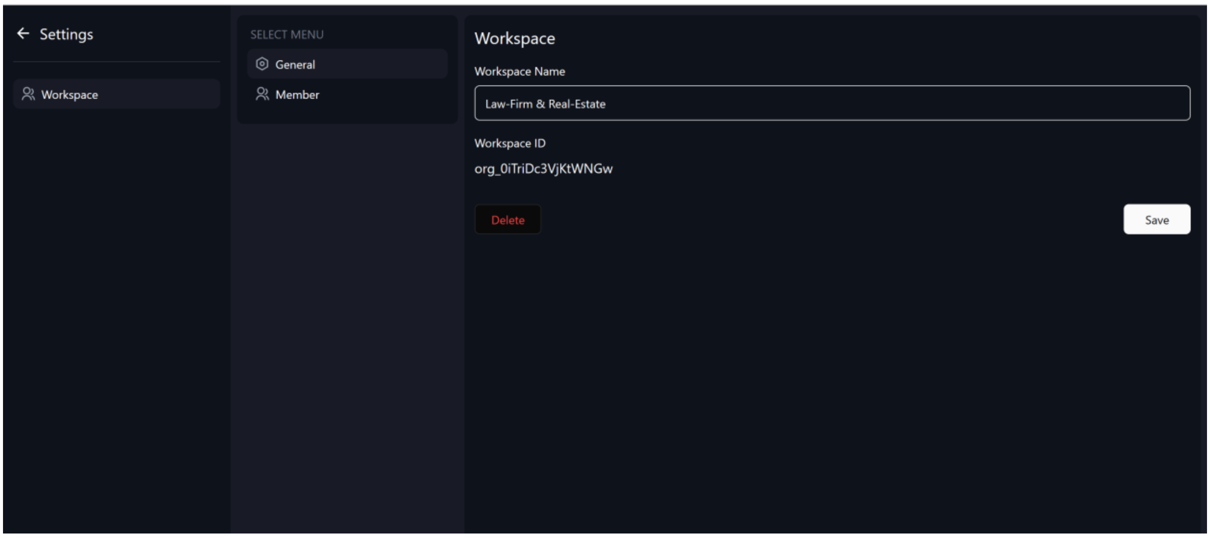

Import
Create an Agent
Conversation Flow Agent
For tasks with complex transitions
Single Prompt Agent
For short calls and straightforward tasks
Multi-Prompt Agent
For lengthy calls and complex tasks
Custom LLM
Attach your custom llm link
12/17/2024,
08:38

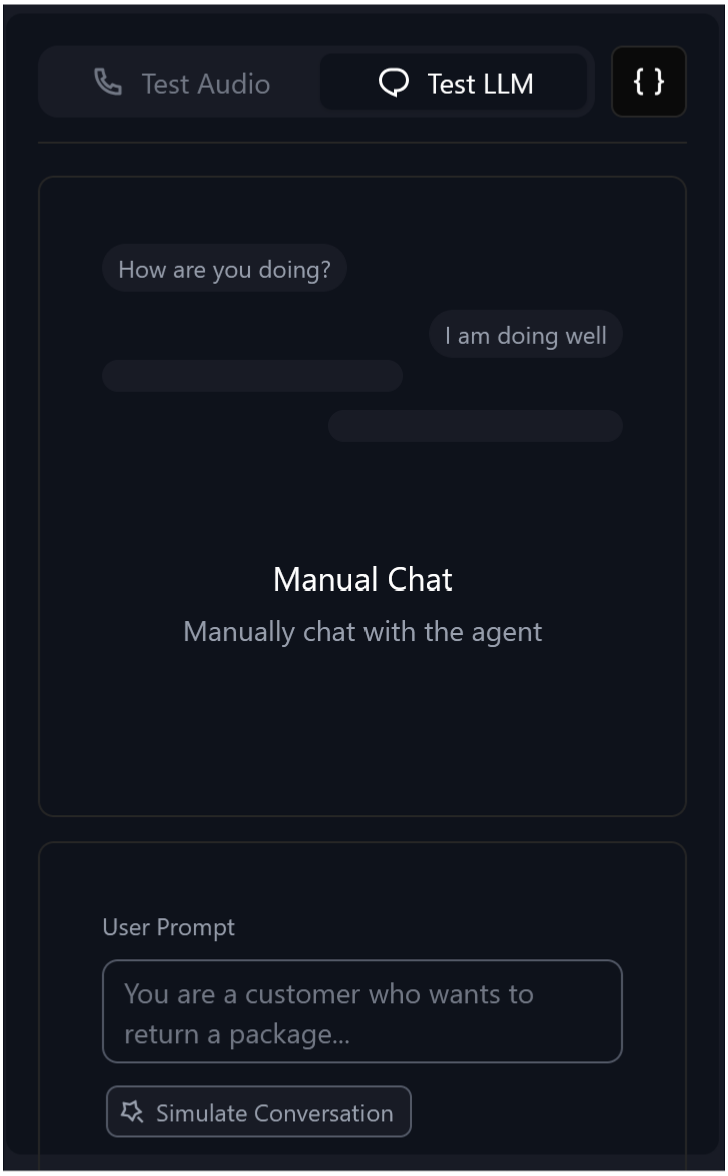

Retell AI
Law-Firm ... Workspace
Agents
Knowledge Base
Phone Numbers
Batch Call
Call History
Analytics
Pay As You Go
Upcoming Invoice: $0.08
Concurrency Used: 0/20
yasha.afghan@gm...
Help Center
Phone Numbers
+1 (272) 777-1112
+1 (272) 777-1112
ID: +12727771112 · Provider: Custom telephony
Make an outbound call
Inbound call agent
Real-Estate-Outbound-Appointment-Setter-(Australia)
Add an inbound webhook. (Learn more).
Outbound call agent
Real-Estate-Outbound-Appointment-Setter-(Australia)

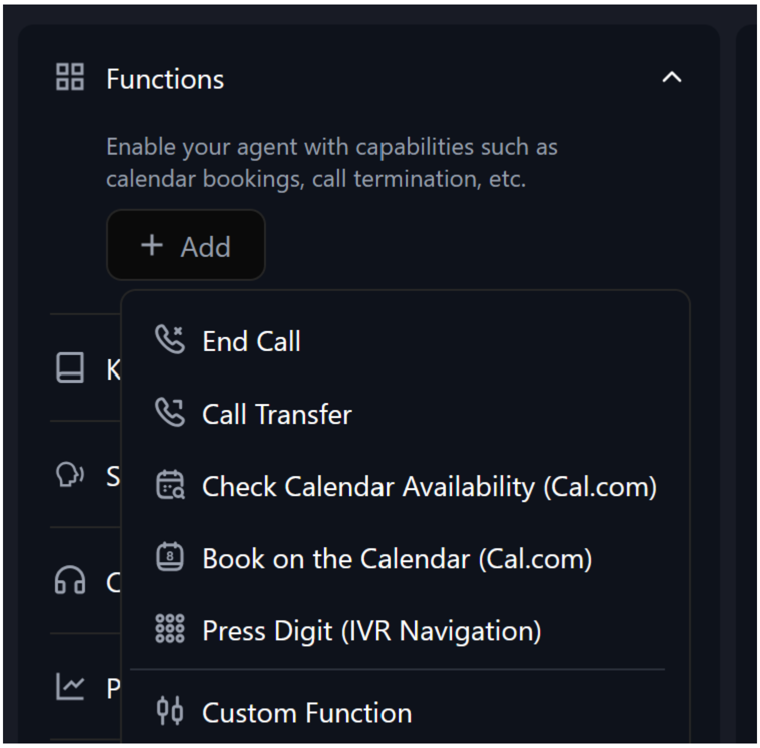

Retell AI
Law-Firm ... Workspace
Agents
Knowledge Base
Phone Numbers
Batch Call
Call History
Analytics
Pay As You Go
Upcoming Invoice: $0.08
Concurrency Used: 0/20
yasha.afghan@gm...
Help Center
Call History
Date Range
Filter
Customize Field
Export
Time
Call Duration
Type
Cost
Call ID
Disconnection...
Call Status
04/10/2025 00:40 0:00 phone_call $0.001 call_c500018bef09b25013ba1f2d570 user hangup ended
04/10/2025 00:40 0:00 phone_call $0.001 call_dba95e732995dcf2fdae3522772 user hangup ended
02/20/2025 06:23 0:26 phone_call $0.034 call_58aec83e9325677f358576b4463 user hangup ended
02/20/2025 06:19 1:39 phone_call $0.127 call_fd6f74c3355a56fef32d96732ee user hangup ended
02/16/2025 17:56 1:54 phone_call $0.146 call_41edccff0ec43cf971672b58fba inactivity ended
02/16/2025 17:54 1:52 phone_call $0.143 call_f3183ebe6c915f8053221c04571 inactivity ended
02/16/2025 16:52 0:00 phone_call $0.001 call_74cb3d5a75aaacae2257dd3369c user hangup ended
1 ...

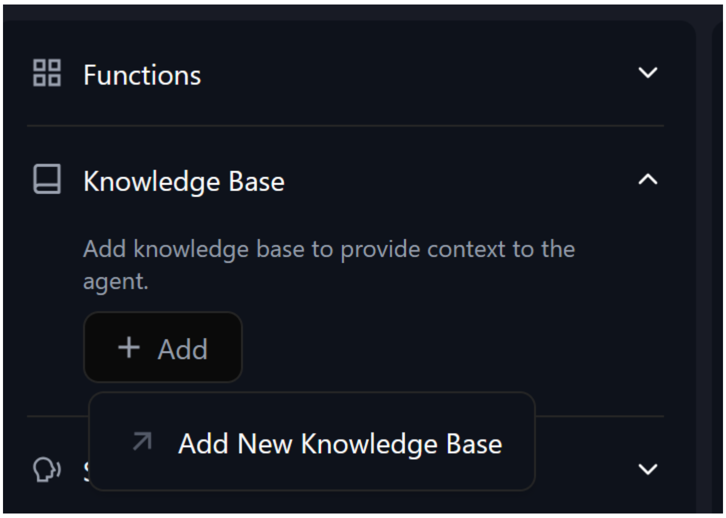

Retell AI
Law-Firm ... Workspace
Agents
Knowledge Base
Phone Numbers
Batch Call
Call History
Analytics
Pay As You Go
Upcoming Invoice: $0.08
Concurrency Used: 0/20
yasha.afghan@gm...
Help Center
Analytics
All time
Filter
Add
Edit
Call Counts
All agents
198
Call Duration
All agents
01:55
Call Latency
All agents
1691ms
Call Counts
All agents
Dec 23, 2024
Dec 30, 2024
Jan 13, 2025
Jan 20, 2025
Jan 27, 2025
Feb 03, 2025
Feb 10, 2025
Apr 07, 2025
Call counts
Call Successful
All agents
Unknown
Unsuccessful
Successful

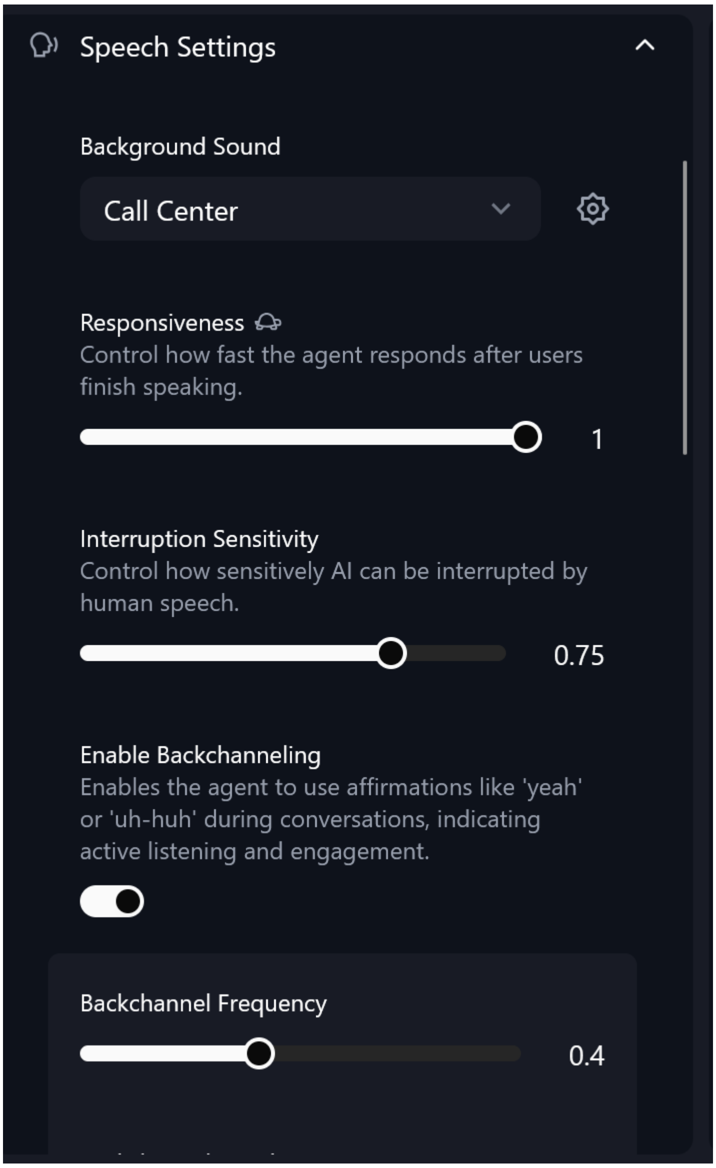

YA
yasha.afghan@gmail.com
yasha.afghan@gmail.com
Workspace
Dark
Logout
YA
yasha.afghan@gm...
Help Center

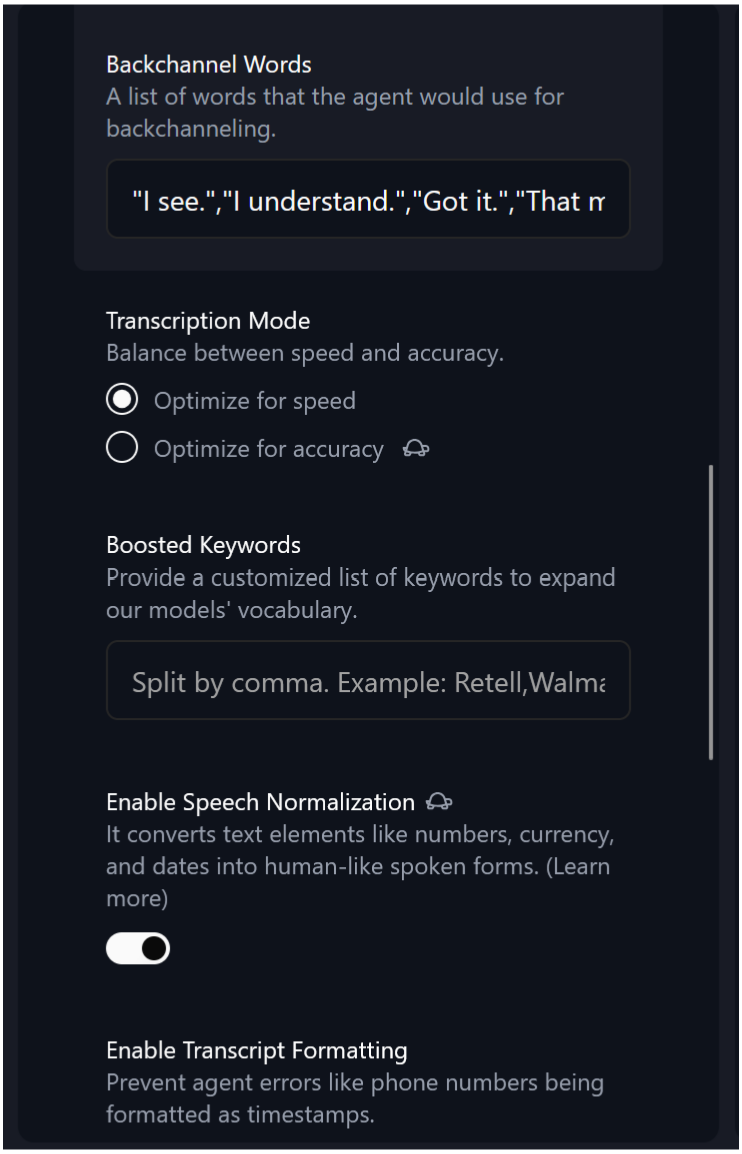

Settings
Workspace
SELECT MENU
General
Member
Workspace
Workspace Name
Law-Firm & Real-Estate
Workspace ID
org_0iTriDc3VjKtWNGw
Delete
Save

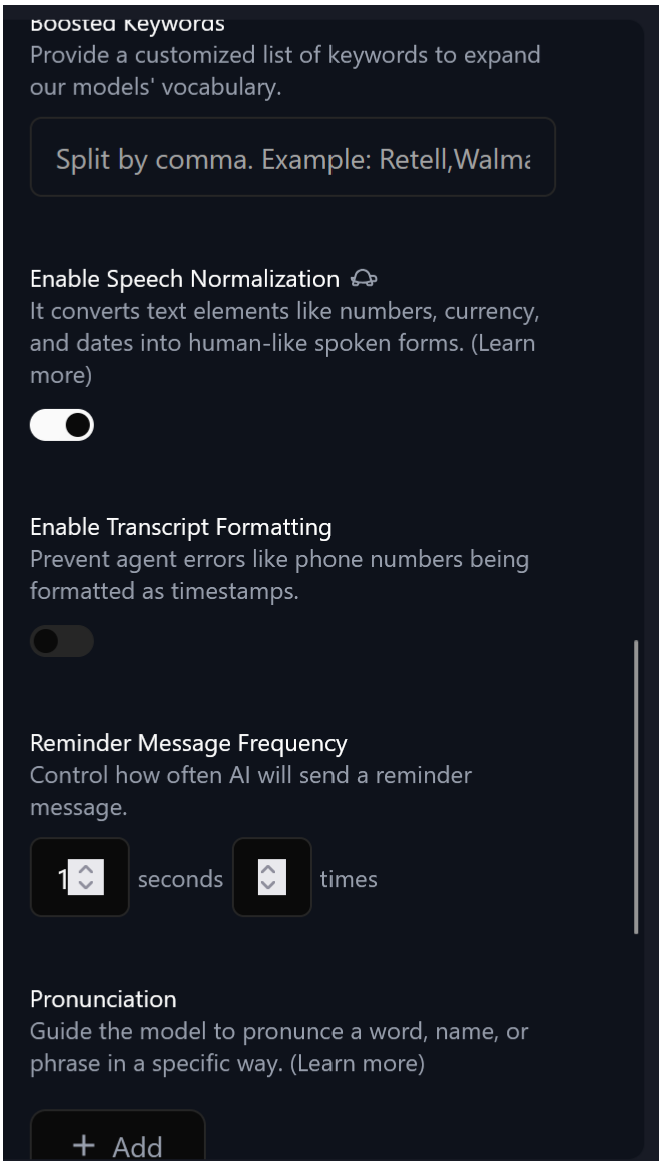

Test Audio
Test LLM
{ }
How are you doing?
I am doing well
Manual Chat
Manually chat with the agent
User Prompt
You are a customer who wants to return a package...
Simulate Conversation

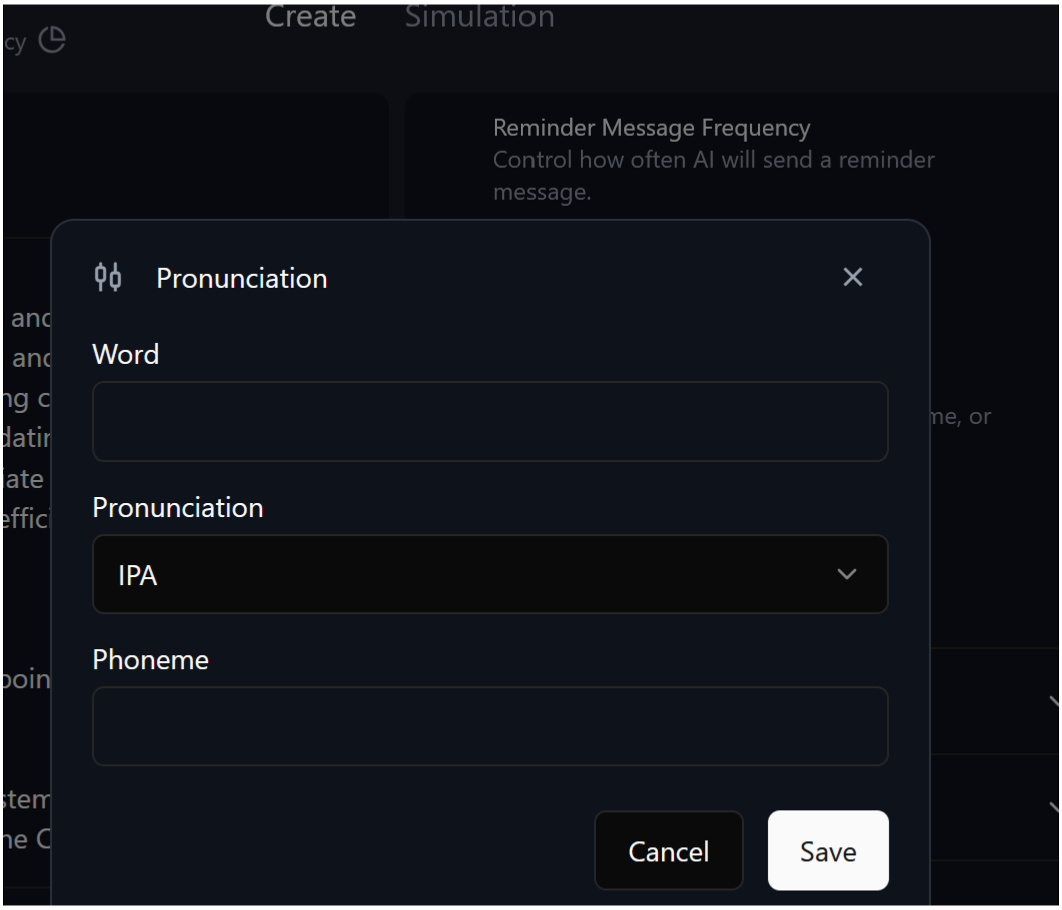

Functions
Enable your agent with capabilities such as calendar bookings, call termination, etc.
Add
End Call
Call Transfer
Check Calendar Availability (Cal.com)
Book on the Calendar (Cal.com)
Press Digit (IVR Navigation)
Custom Function

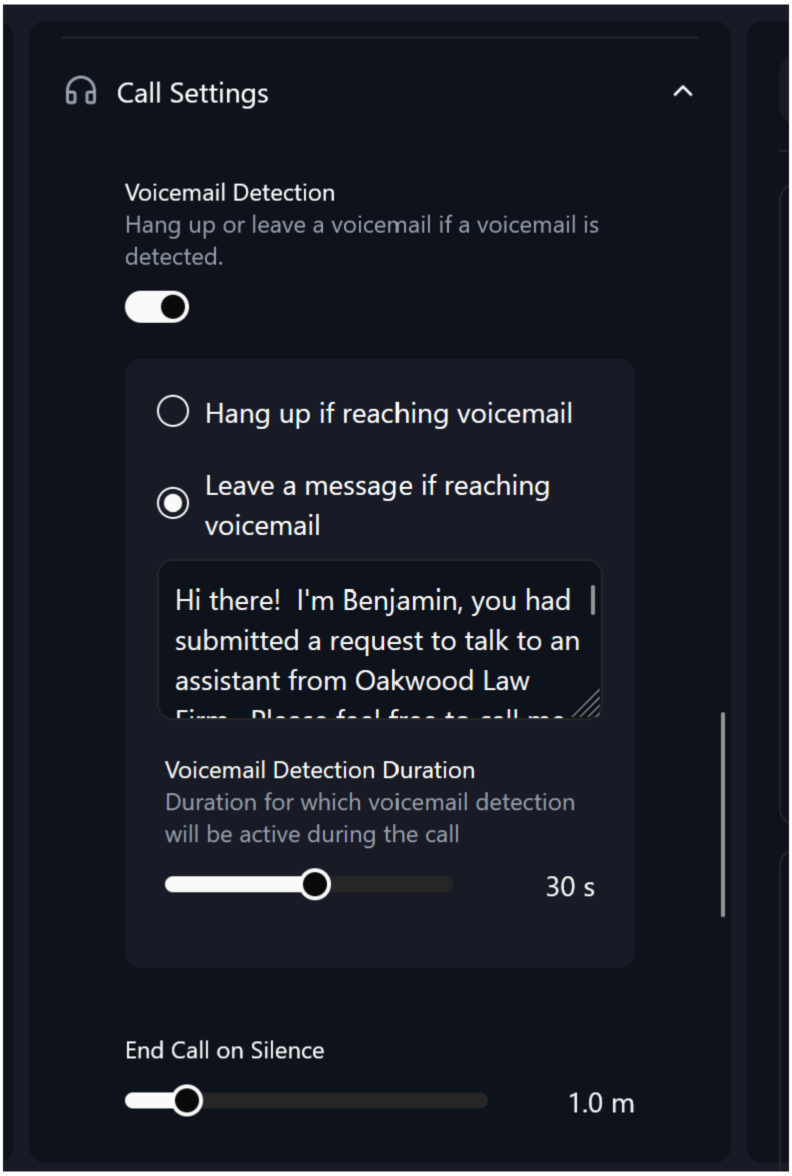

Functions
Knowledge Base
Add knowledge base to provide context to the agent.
Add
Add New Knowledge Base

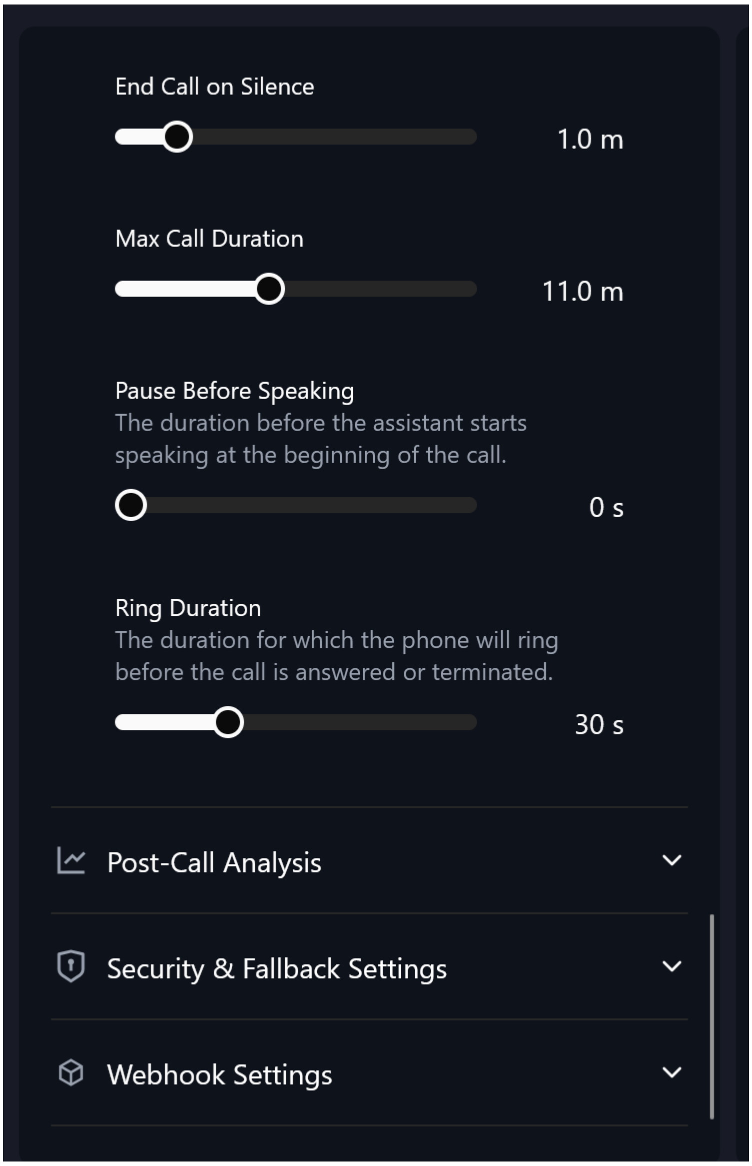

Speech Settings
Background Sound
Call Center
Responsiveness
Control how fast the agent responds after users finish speaking.
1
Interruption Sensitivity
Control how sensitively AI can be interrupted by human speech.
0.75
Enable Backchanneling
Enables the agent to use affirmations like 'yeah' or 'uh-huh' during conversations, indicating active listening and engagement.
Backchannel Frequency
0.4

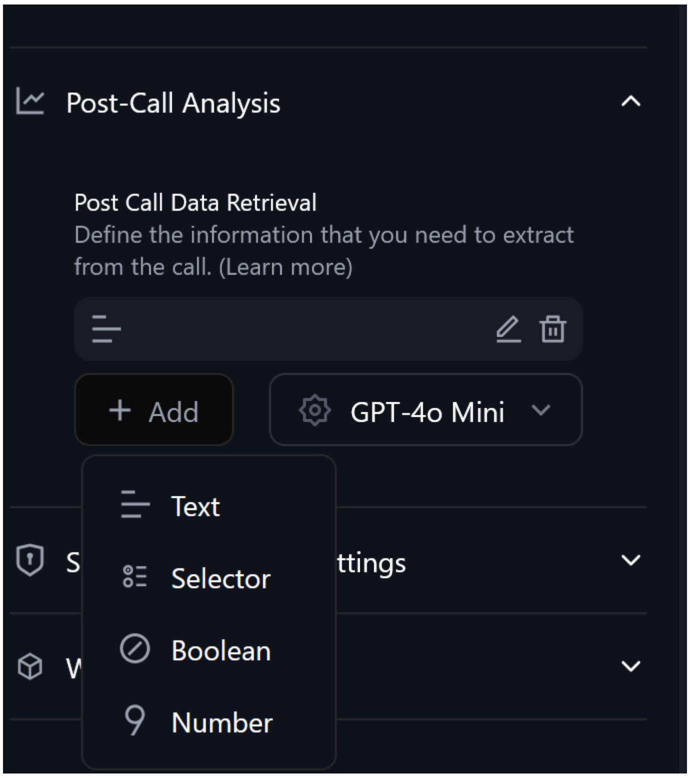

Backchannel Words
A list of words that the agent would use for backchanneling.
"I see.","I understand.","Got it.","That m
Transcription Mode
Balance between speed and accuracy.
Optimize for speed
Optimize for accuracy
Boosted Keywords
Provide a customized list of keywords to expand our models' vocabulary.
Split by comma. Example: Retell,Walm
Enable Speech Normalization
It converts text elements like numbers, currency, and dates into human-like spoken forms. (Learn more)
Enable Transcript Formatting
Prevent agent errors like phone numbers being formatted as timestamps.

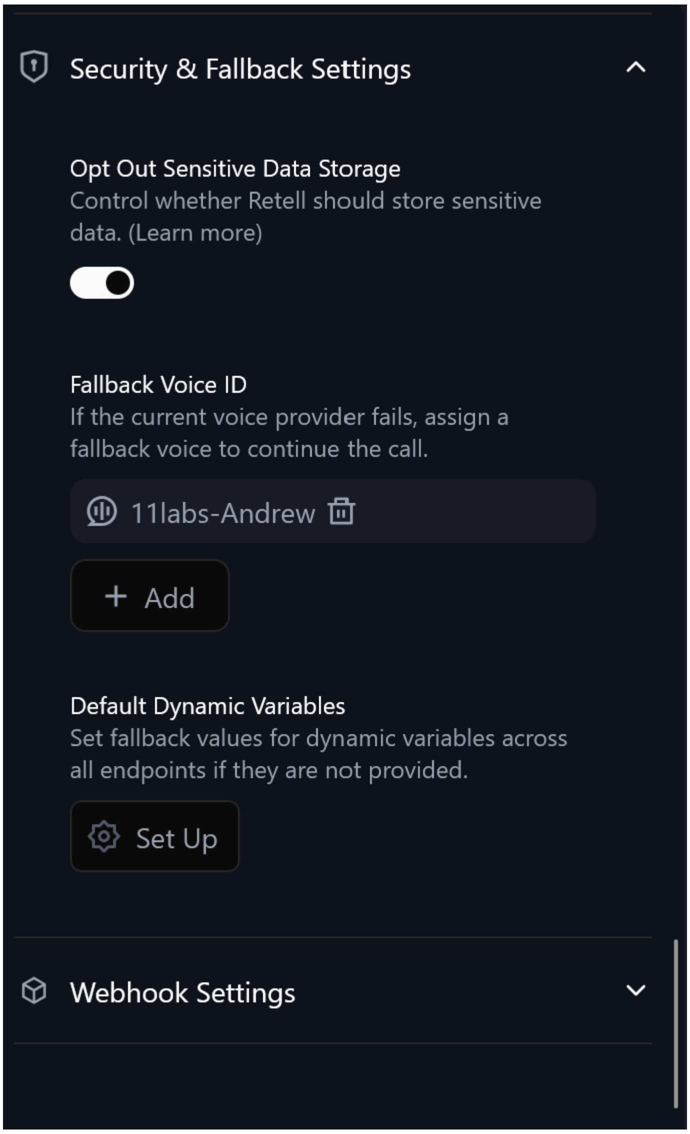

Boosted Keywords
Provide a customized list of keywords to expand our models' vocabulary.
Split by comma. Example: Retell,Walma
Enable Speech Normalization
It converts text elements like numbers, currency, and dates into human-like spoken forms. (Learn more)
Enable Transcript Formatting
Prevent agent errors like phone numbers being formatted as timestamps.
Reminder Message Frequency
Control how often AI will send a reminder message.
1
seconds
times
Pronunciation
Guide the model to pronunce a word, name, or phrase in a specific way. (Learn more)
+ Add

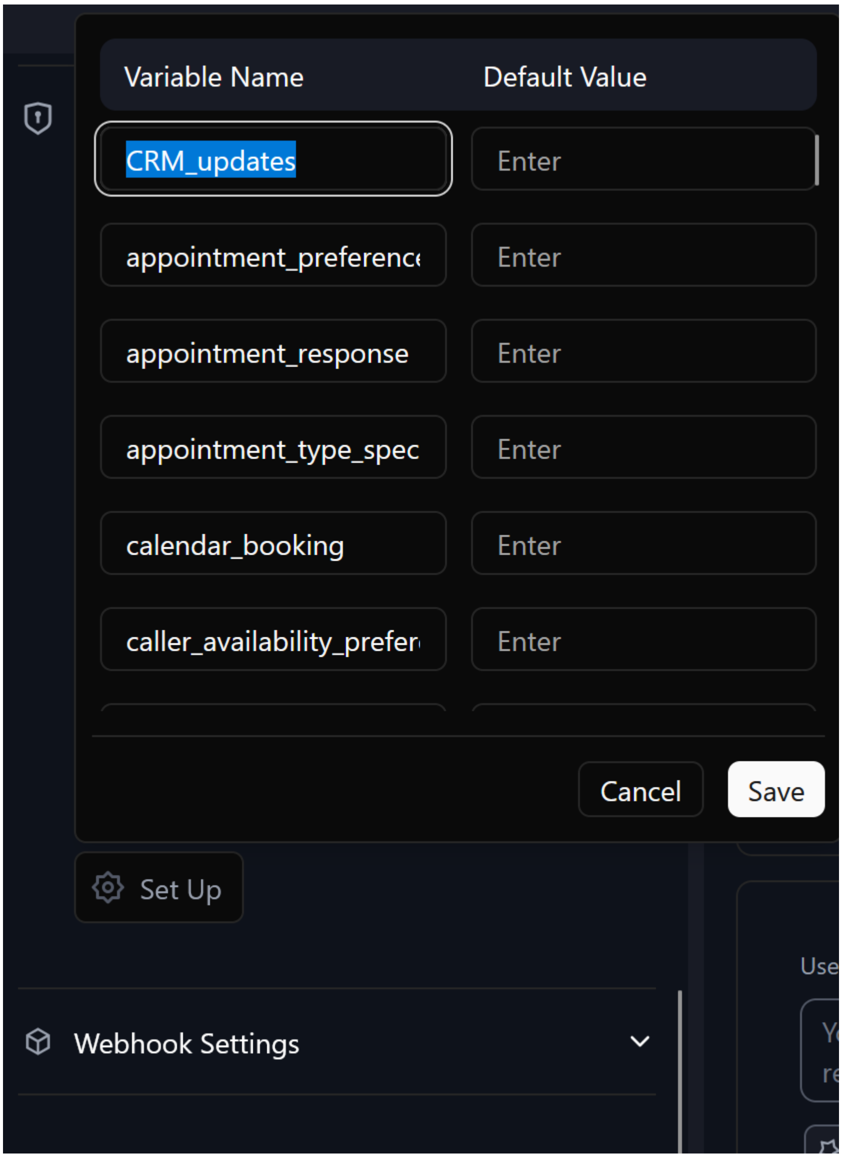

Create
Simulation
Reminder Message Frequency
Control how often AI will send a reminder message.
Pronunciation
Word
Pronunciation
IPA
Phoneme
Cancel
Save

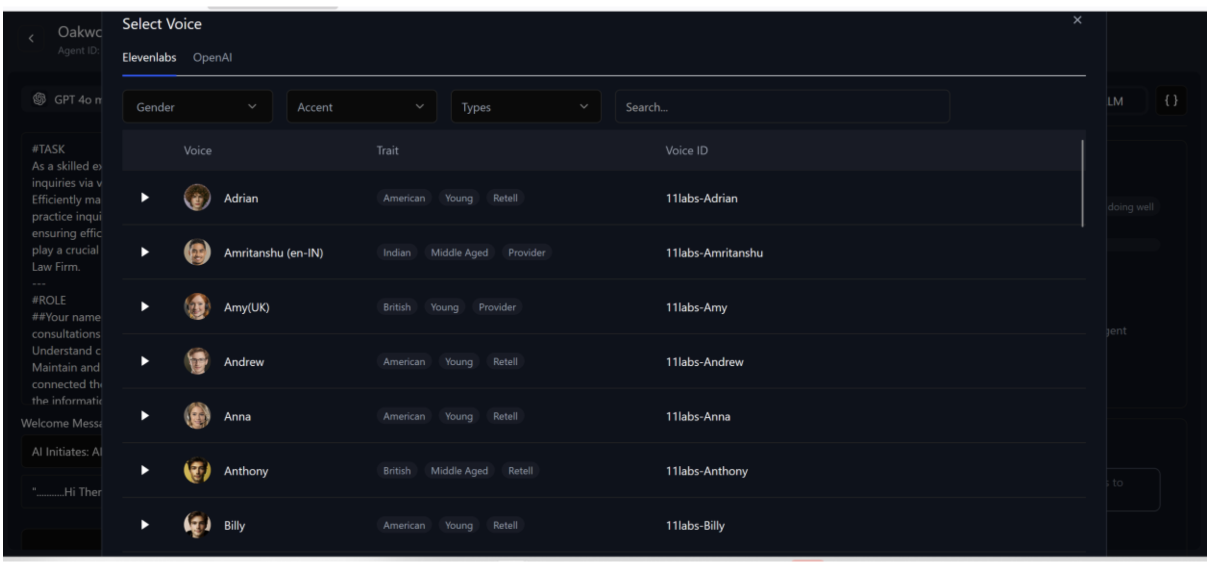

Call Settings
Voicemail Detection
Hang up or leave a voicemail if a voicemail is detected.
Hang up if reaching voicemail
Leave a message if reaching voicemail
Hi there! I'm Benjamin, you had submitted a request to talk to an assistant from Oakwood Law
Voicemail Detection Duration
Duration for which voicemail detection will be active during the call
30 s
End Call on Silence
1.0 m

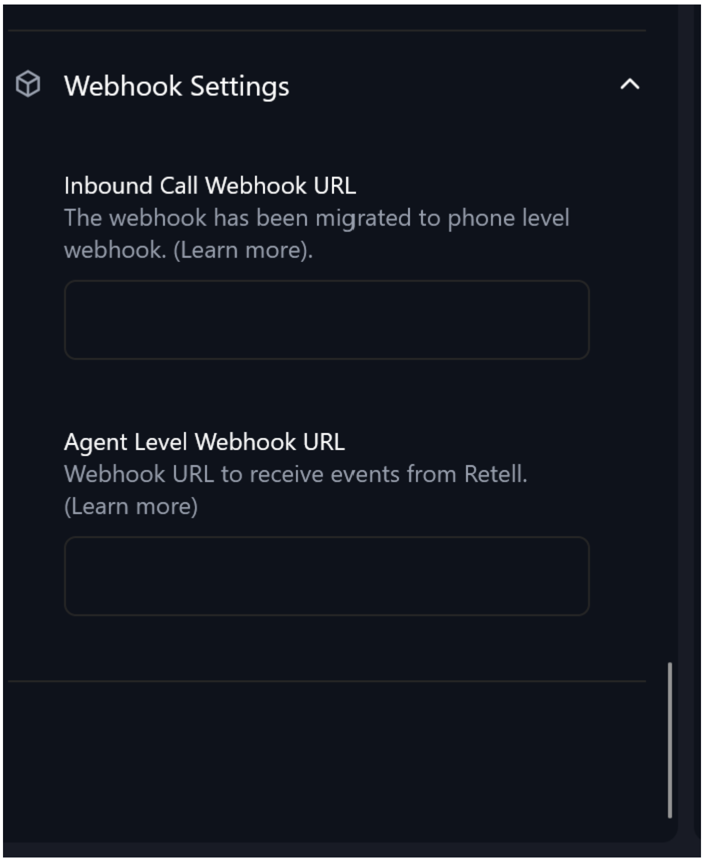

End Call on Silence
1.0 m
Max Call Duration
11.0 m
Pause Before Speaking
The duration before the assistant starts speaking at the beginning of the call.
0 s
Ring Duration
The duration for which the phone will ring before the call is answered or terminated.
30 s
Post-Call Analysis
Security & Fallback Settings
Webhook Settings


Post-Call Analysis
Post Call Data Retrieval
Define the information that you need to extract from the call. (Learn more)
Add
GPT-4o Mini
Text
Selector
Boolean
Number
ttings

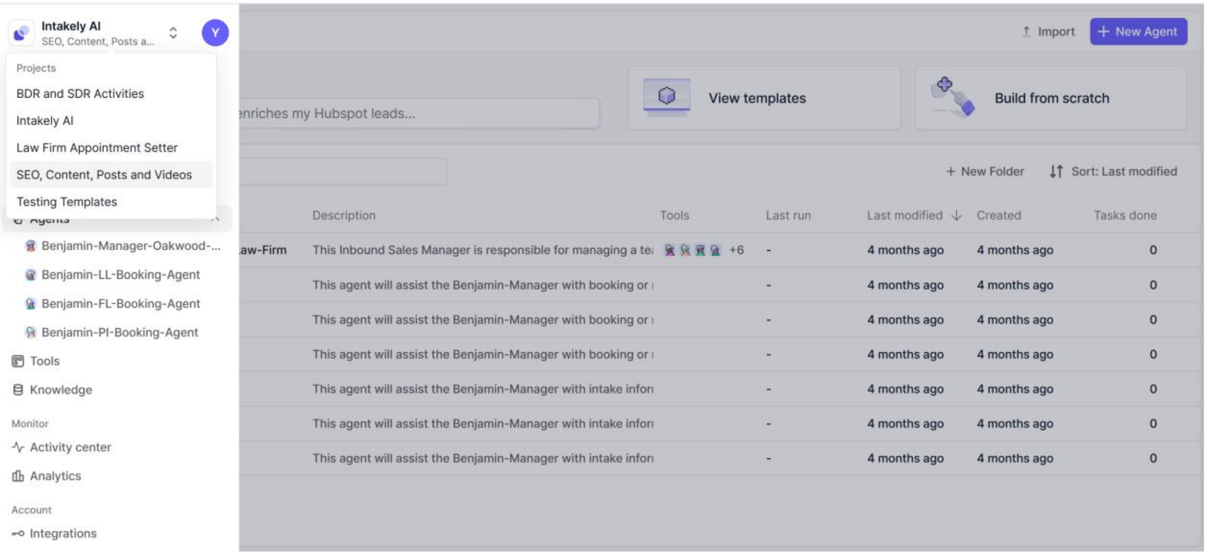

Security & Fallback Settings
Opt Out Sensitive Data Storage
Control whether Retell should store sensitive data. (Learn more)
Fallback Voice ID
If the current voice provider fails, assign a fallback voice to continue the call.
11labs-Andrew
Add
Default Dynamic Variables
Set fallback values for dynamic variables across all endpoints if they are not provided.
Set Up
Webhook Settings

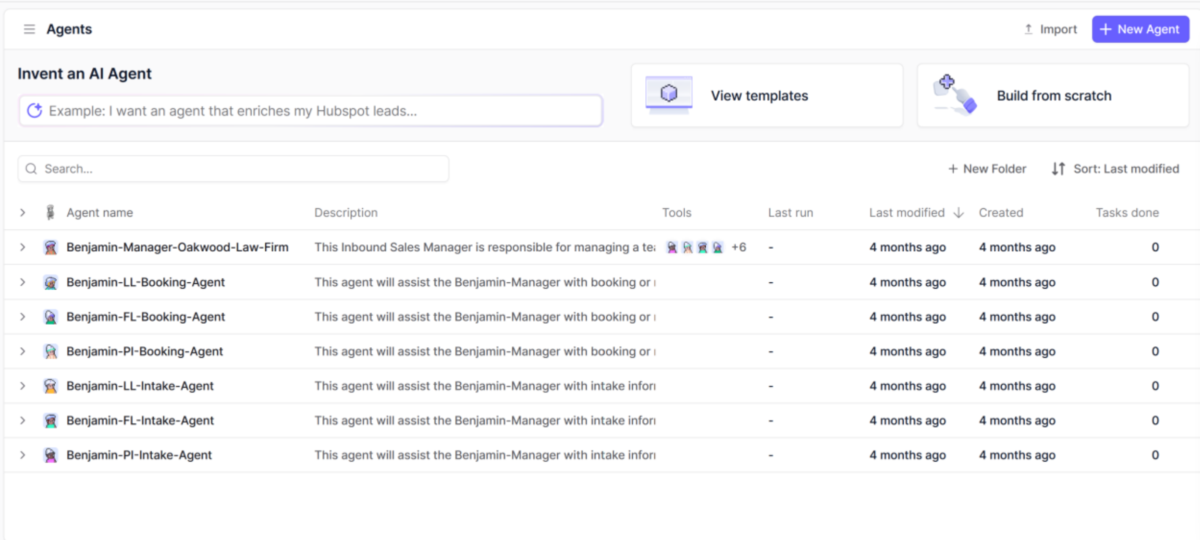

Variable Name
Default Value
CRM_updates
Enter
appointment_preferenc
Enter
appointment_response
Enter
appointment_type_spec
Enter
calendar_booking
Enter
caller_availability_prefer
Enter
Cancel
Save
Set Up
Webhook Settings

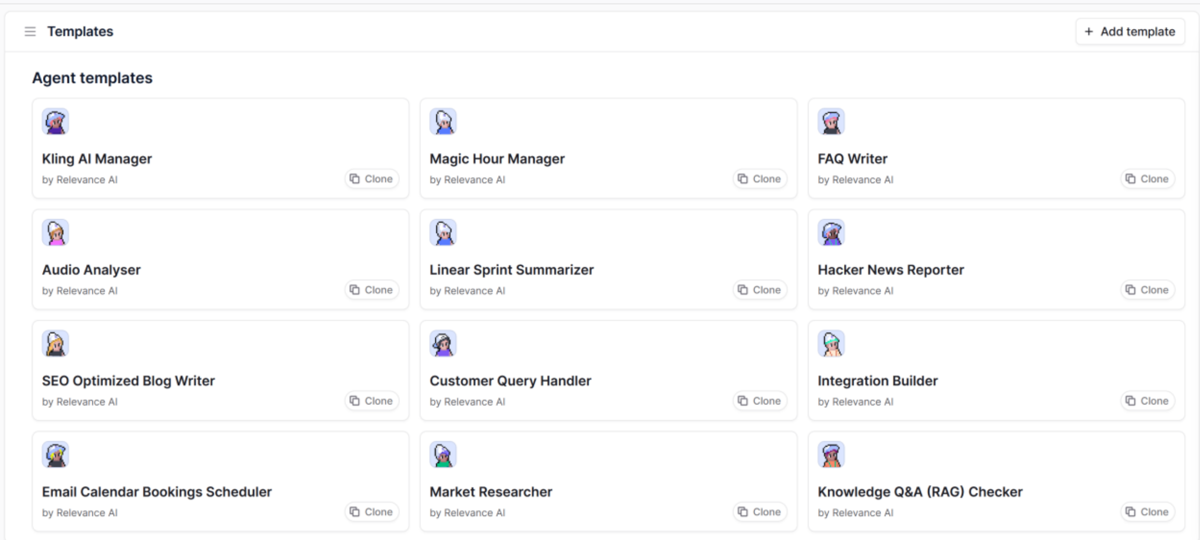

Select Voice
Elevenlabs
OpenAI
Gender
Accent
Types
Search...
Voice
Trait
Voice ID
Adrian
American Young Retell
11labs-Adrian
Amritanshu (en-IN)
Indian Middle Aged Provider
11labs-Amritanshu
Amy(UK)
British Young Provider
11labs-Amy
Andrew
American Young Retell
11labs-Andrew
Anna
American Young Retell
11labs-Anna
Anthony
British Middle Aged Retell
11labs-Anthony
Billy
American Young Retell
11labs-Billy

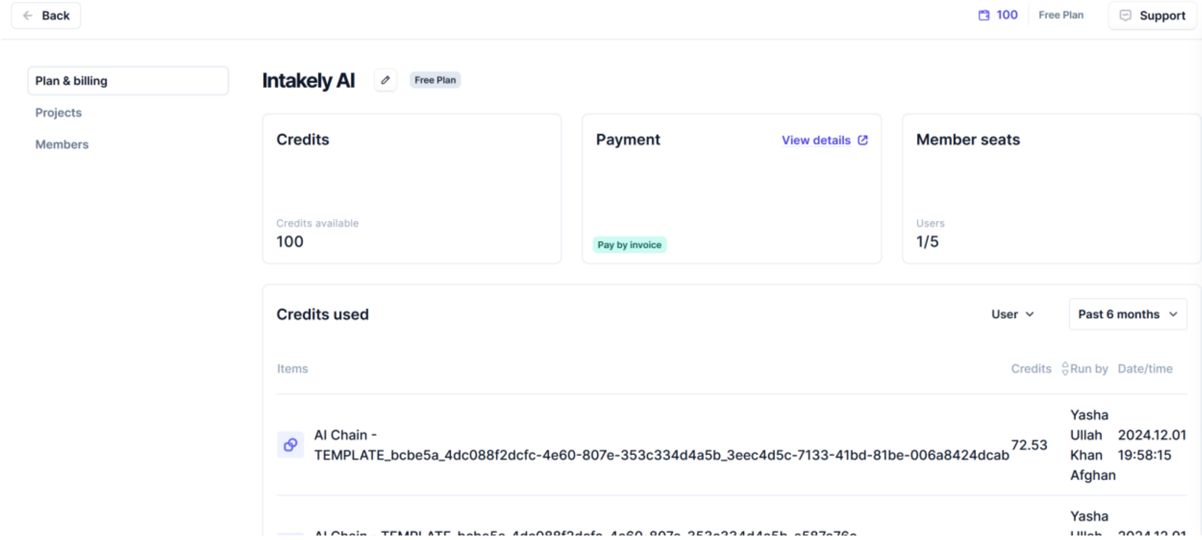

Webhook Settings
Inbound Call Webhook URL
The webhook has been migrated to phone level webhook. (Learn more).
Agent Level Webhook URL
Webhook URL to receive events from Retell. (Learn more)

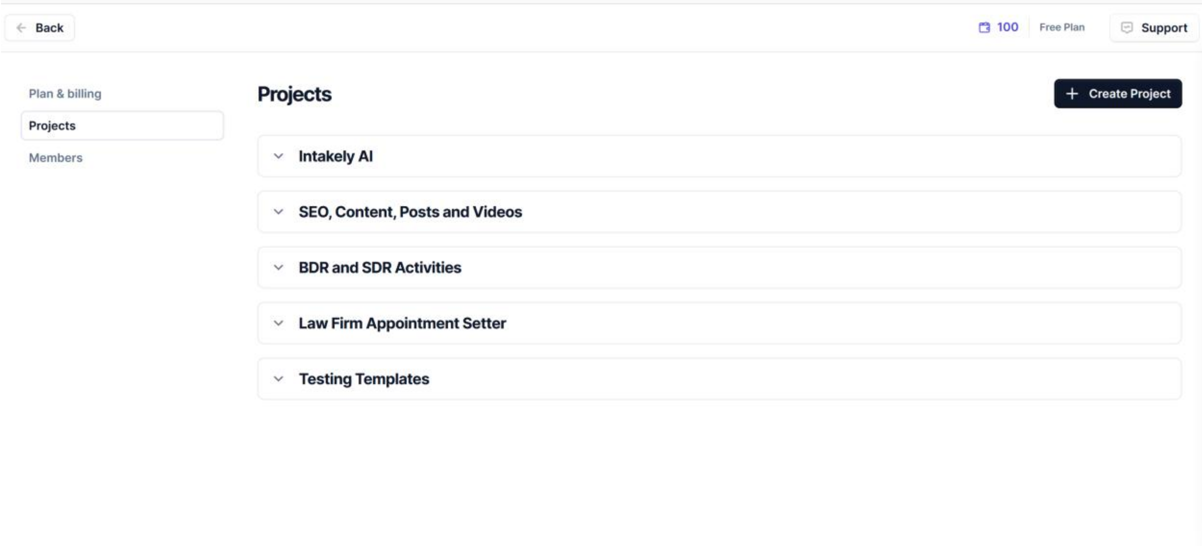
RELEVANCEAI.COM AI AGENT SCREENSHOTS AS A SAMPLE UI/UX TO WORK WITH AS INSTRUCTED ABOVE.

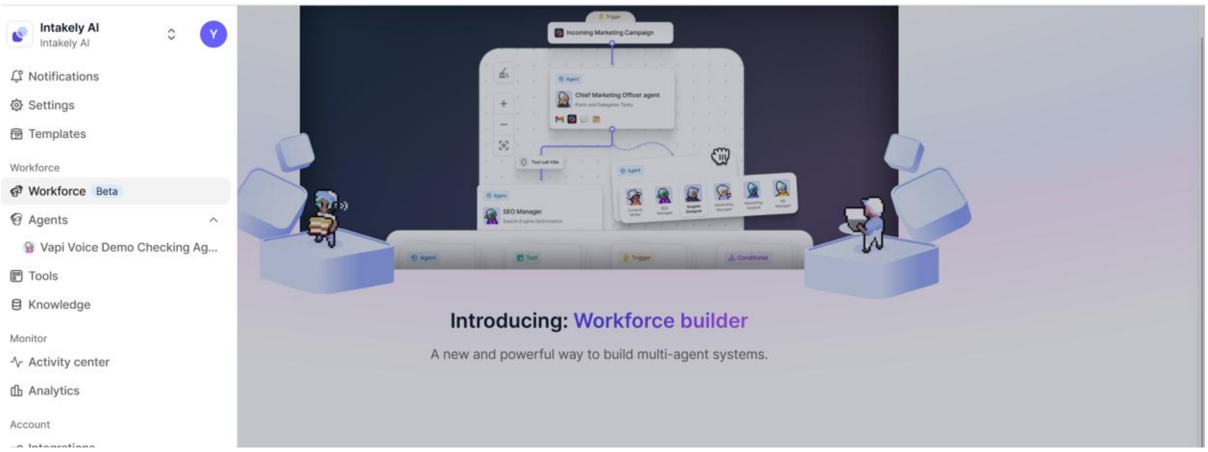


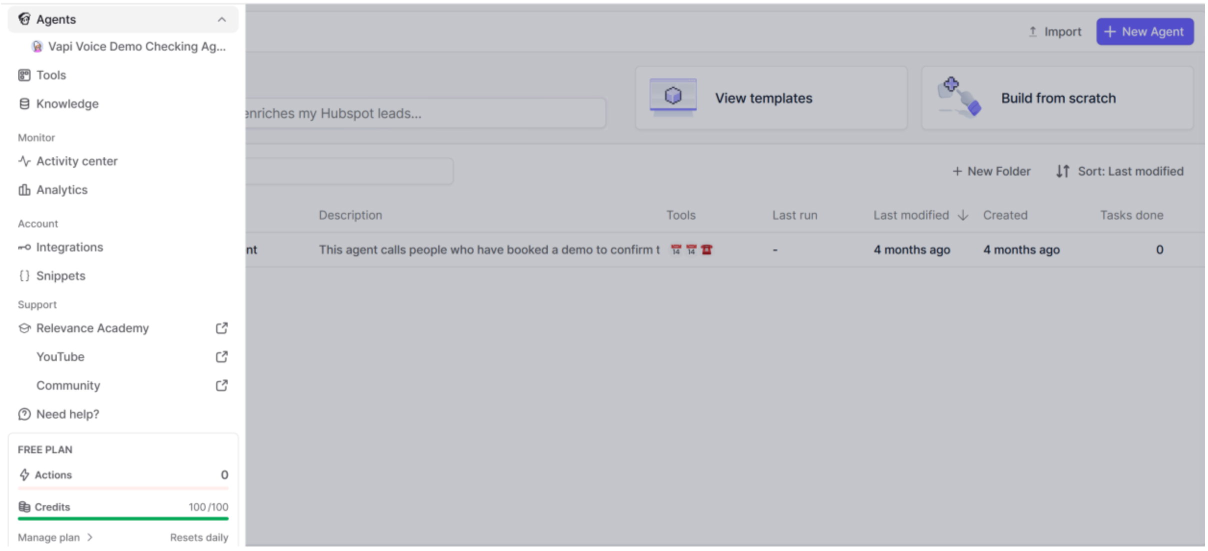


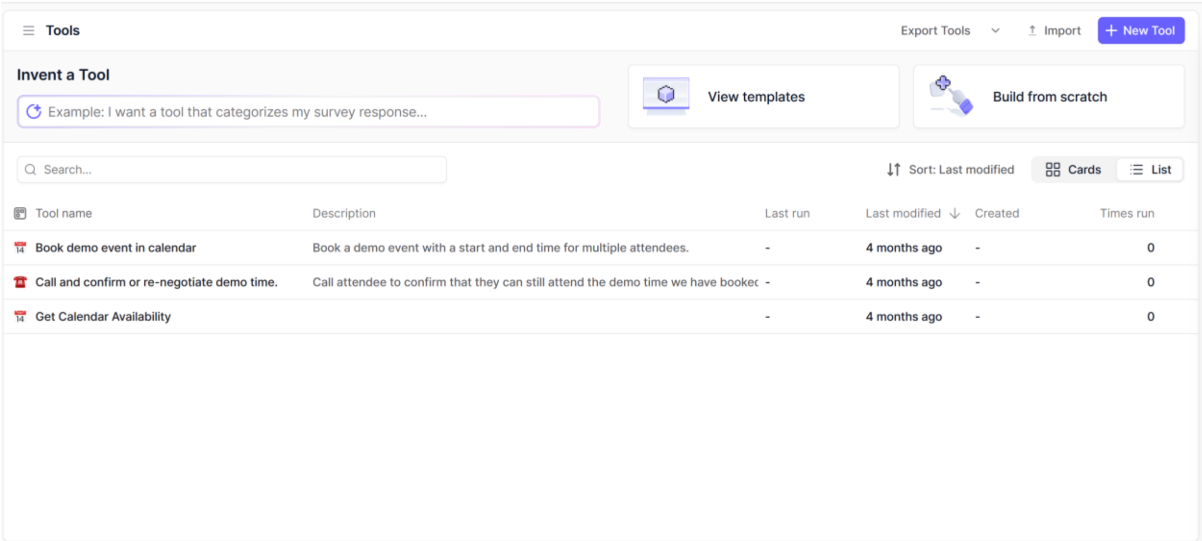


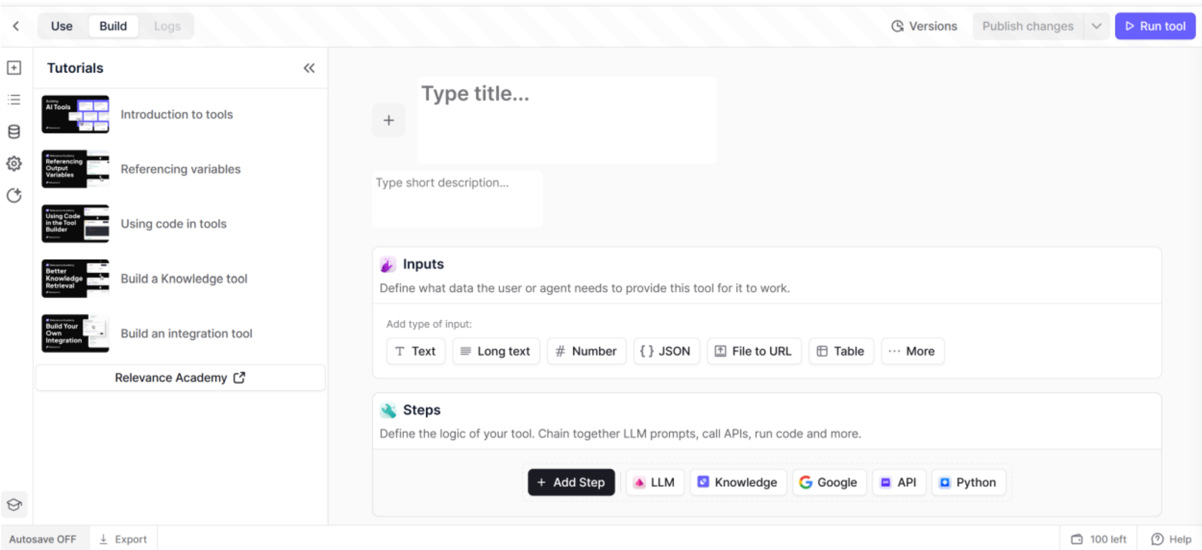

Back
100
Free Plan
Support
Plan & billing
Projects
Members
Intakely AI
Free Plan
Credits
Credits available
100
Payment
View details
Pay by invoice
Member seats
Users
1/5
Credits used
User
Past 6 months
Items
Credits
Run by
Date/time
AI Chain - TEMPLATE_bcbe5a_4dc088f2dcfc-4e60-807e-353c334d4a5b_3eec4d5c-7133-41bd-81be-006a8424dcab
72.53
Yasha Ullah Khan Afghan
2024.12.01 19:58:15
Yasha

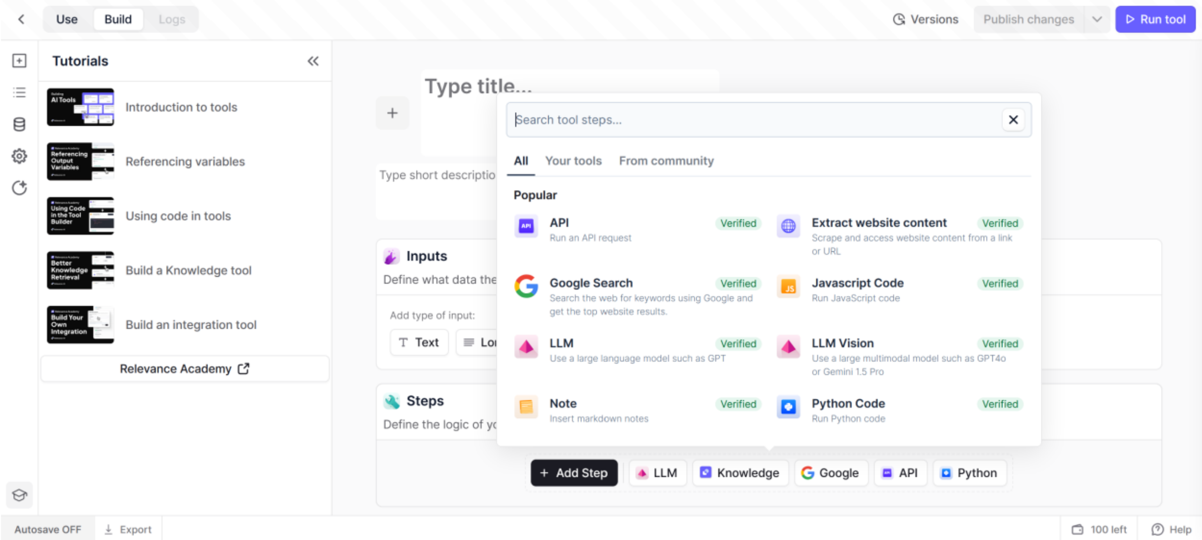

Back
100
Free Plan
Support
Plan & billing
Projects
Members
Projects
Create Project
Intakely AI
SEO, Content, Posts and Videos
BDR and SDR Activities
Law Firm Appointment Setter
Testing Templates


Intakely AI
Intakely AI
Y
Notifications
Settings
Templates
Workforce
Workforce Beta
Agents
Vapi Voice Demo Checking Ag...
Tools
Knowledge
Monitor
Activity center
Analytics
Account
Incoming Marketing Campaign
Chief Marketing Officer agent
SEO Manager
Introducing: Workforce builder
A new and powerful way to build multi-agent systems.


Agents
Vapi Voice Demo Checking Ag...
Tools
Knowledge
Monitor
Activity center
Analytics
Account
Integrations
Snippets
Support
Relevance Academy
YouTube
Community
Need help?
FREE PLAN
Actions 0
Credits 100/100
Manage plan
Resets daily
Import
New Agent
nriches my Hubspot leads...
View templates
Build from scratch
New Folder
Sort: Last modified
Description
Tools
Last run
Last modified
Created
Tasks done
nt
This agent calls people who have booked a demo to confirm t
-
4 months ago
4 months ago
0


Tools
Export Tools
Import
New Tool
Invent a Tool
Example: I want a tool that categorizes my survey response...
View templates
Build from scratch
Search...
Sort: Last modified
Cards
List
Tool name
Description
Last run
Last modified
Created
Times run
Book demo event in calendar
Book a demo event with a start and end time for multiple attendees.
- 4 months ago - 0
Call and confirm or re-negotiate demo time.
Call attendee to confirm that they can still attend the demo time we have bookec
- 4 months ago - 0
Get Calendar Availability
- 4 months ago - 0


Use
Build
Logs
Versions
Publish changes
Run tool
Tutorials
Introduction to tools
Referencing variables
Using code in tools
Build a Knowledge tool
Build an integration tool
Relevance Academy
Type title...
Type short description...
Inputs
Define what data the user or agent needs to provide this tool for it to work.
Add type of input:
Text
Long text
Number
JSON
File to URL
Table
More
Steps
Define the logic of your tool. Chain together LLM prompts, call APIs, run code and more.
Add Step
LLM
Knowledge
Google
API
Python
Autosave OFF
Export
100 left
Help


Use
Build
Logs
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Run tool
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Introduction to tools
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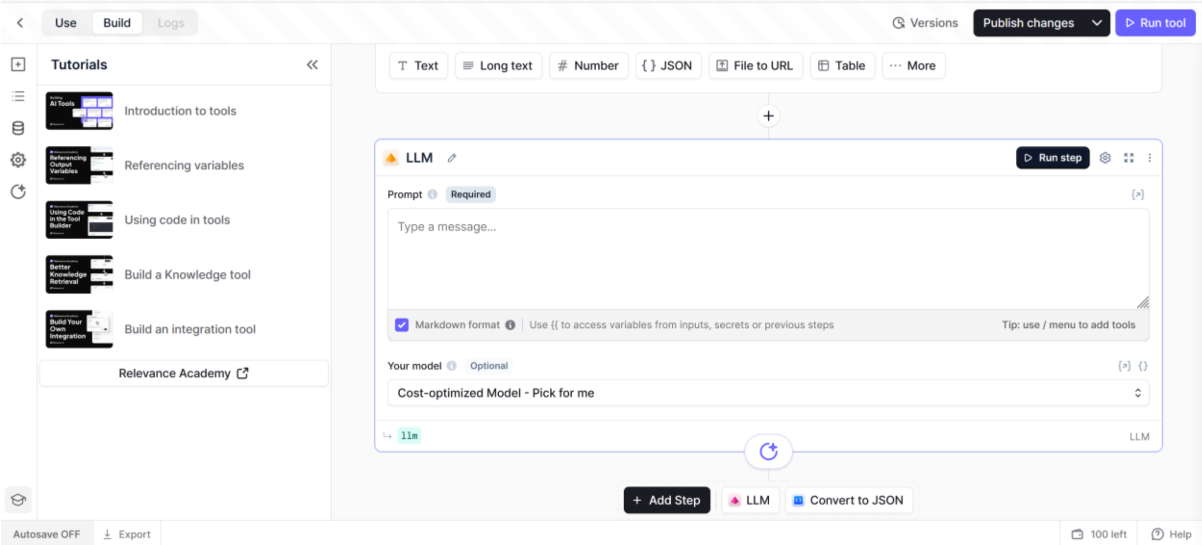
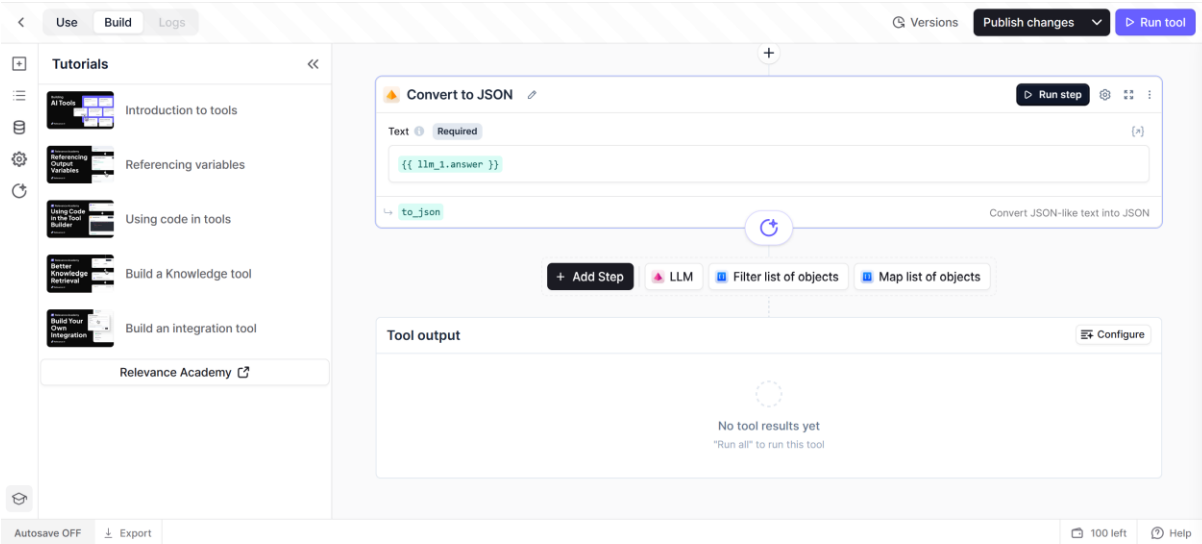
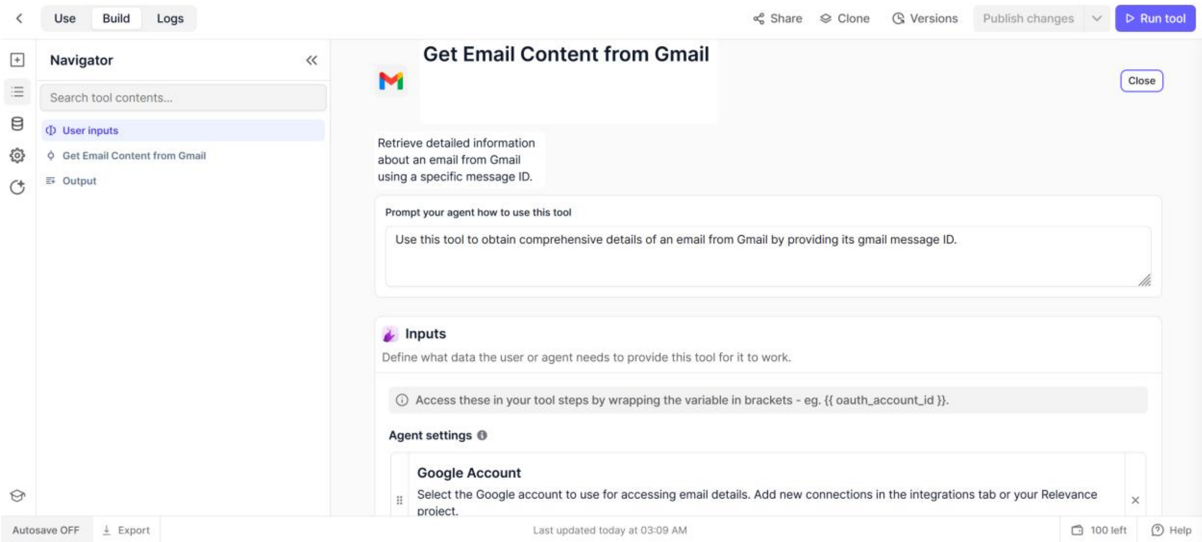
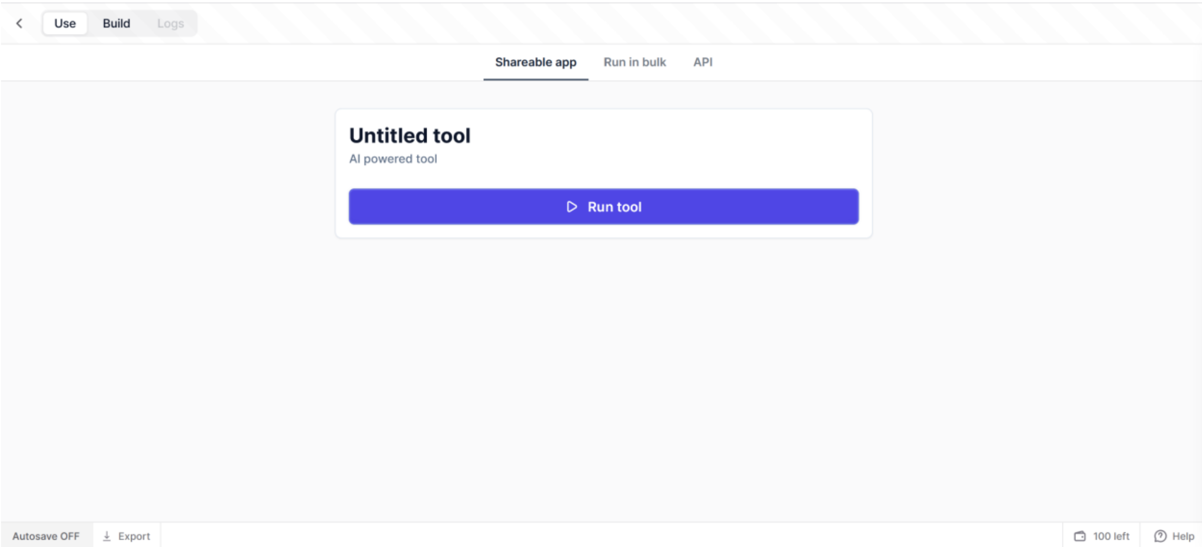
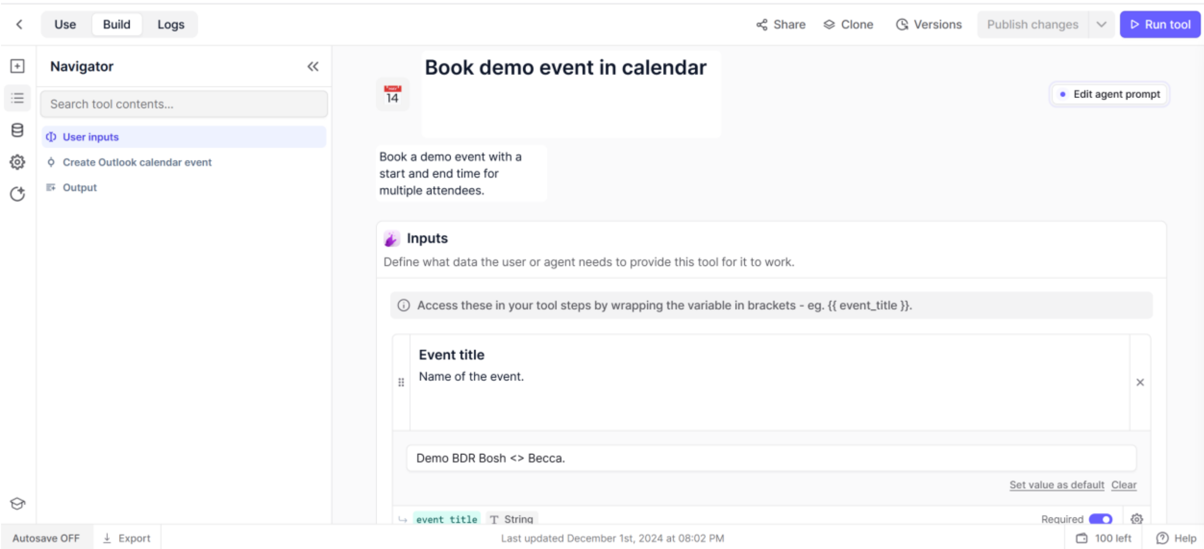
Using code in tools
Build a Knowledge tool
Build an integration tool
Relevance Academy
Type title...
Type short descriptio
Inputs
Define what data the
Add type of input:
Text
Steps
Define the logic of yo
Search tool steps...
All
Your tools
From community
Popular
API
Run an API request
Verified
Extract website content
Scrape and access website content from a link or URL
Verified
Google Search
Search the web for keywords using Google and get the top website results.
Verified
Javascript Code
Run JavaScript code
Verified
LLM
Use a large language model such as GPT
Verified
LLM Vision
Use a large multimodal model such as GPT4o or Gemini 1.5 Pro
Verified
Note
Insert markdown notes
Verified
Python Code
Run Python code
Verified
Add Step
LLM
Knowledge
Google
API
Python
Autosave OFF
Export
100 left
Help

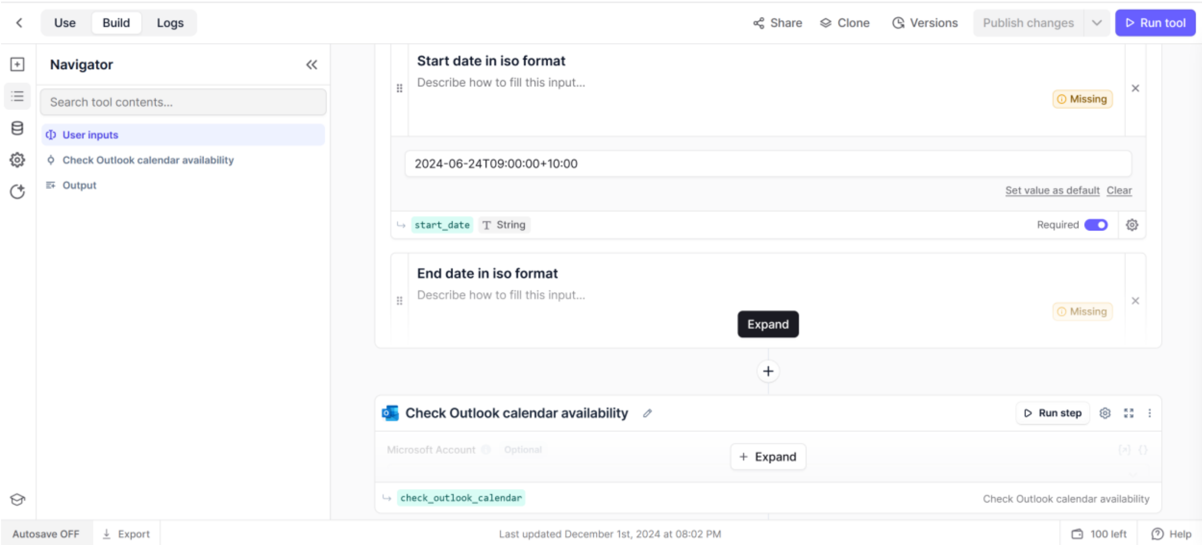

Use
Build
Logs
Versions
Publish changes
Run tool
Tutorials
Introduction to tools
Referencing variables
Using code in tools
Build a Knowledge tool
Build an integration tool
Relevance Academy
Text
Long text
Number
JSON
File to URL
Table
More
LLM
Run step
Prompt
Required
Type a message...
Markdown format
Use {{ to access variables from inputs, secrets or previous steps
Tip: use / menu to add tools
Your model
Optional
Cost-optimized Model - Pick for me
llm
LLM
Add Step
LLM
Convert to JSON
Autosave OFF
Export
100 left
Help

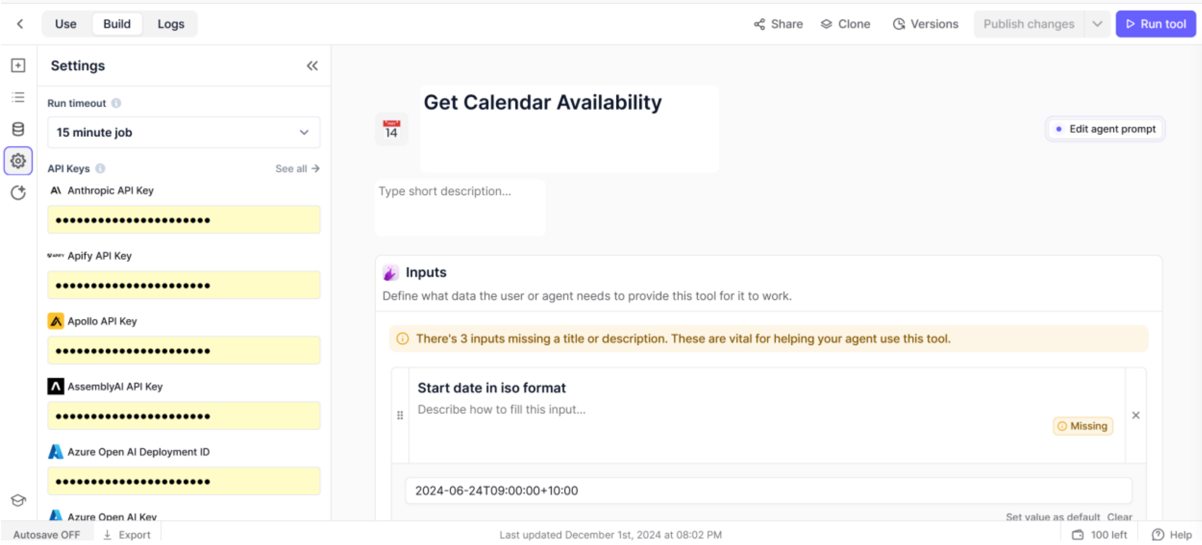

Use
Build
Logs
Versions
Publish changes
Run tool
Tutorials
Introduction to tools
Referencing variables
Using code in tools
Build a Knowledge tool
Build an integration tool
Relevance Academy
Convert to JSON
Run step
Text
Required
{{ llm_1.answer }}
to_json
Convert JSON-like text into JSON
Add Step
LLM
Filter list of objects
Map list of objects
Tool output
Configure
No tool results yet
"Run all" to run this tool
Autosave OFF
Export
100 left
Help

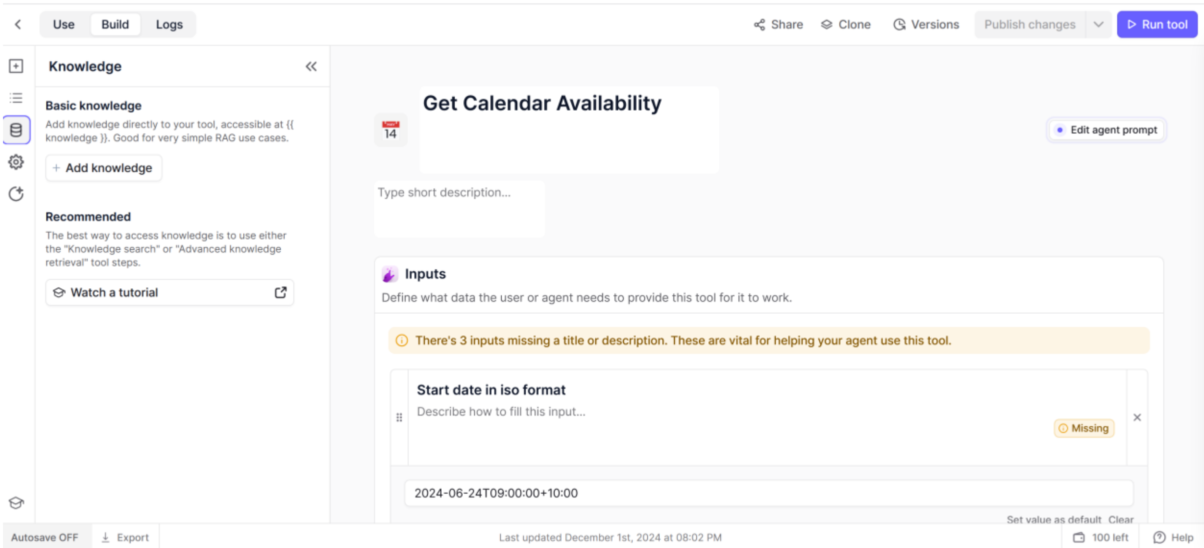

Use
Build
Logs
Share
Clone
Versions
Publish changes
Run tool
Navigator
Search tool contents...
User inputs
Get Email Content from Gmail
Output
Get Email Content from Gmail
Close
Retrieve detailed information about an email from Gmail using a specific message ID.
Prompt your agent how to use this tool
Use this tool to obtain comprehensive details of an email from Gmail by providing its gmail message ID.
Inputs
Define what data the user or agent needs to provide this tool for it to work.
Access these in your tool steps by wrapping the variable in brackets - eg. {{ oauth_account_id }}.
Agent settings
Google Account
Select the Google account to use for accessing email details. Add new connections in the integrations tab or your Relevance project.
Autosave OFF
Export
Last updated today at 03:09 AM
100 left
Help

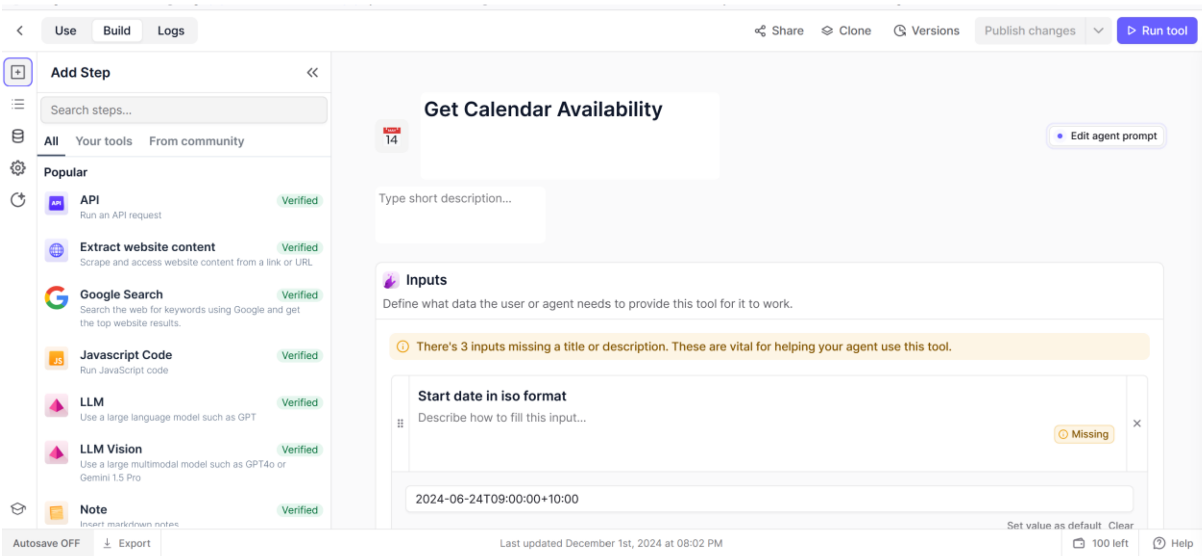

Use
Build
Logs
Shareable app
Run in bulk
API
Untitled tool
AI powered tool
Run tool
Autosave OFF
Export
100 left
Help

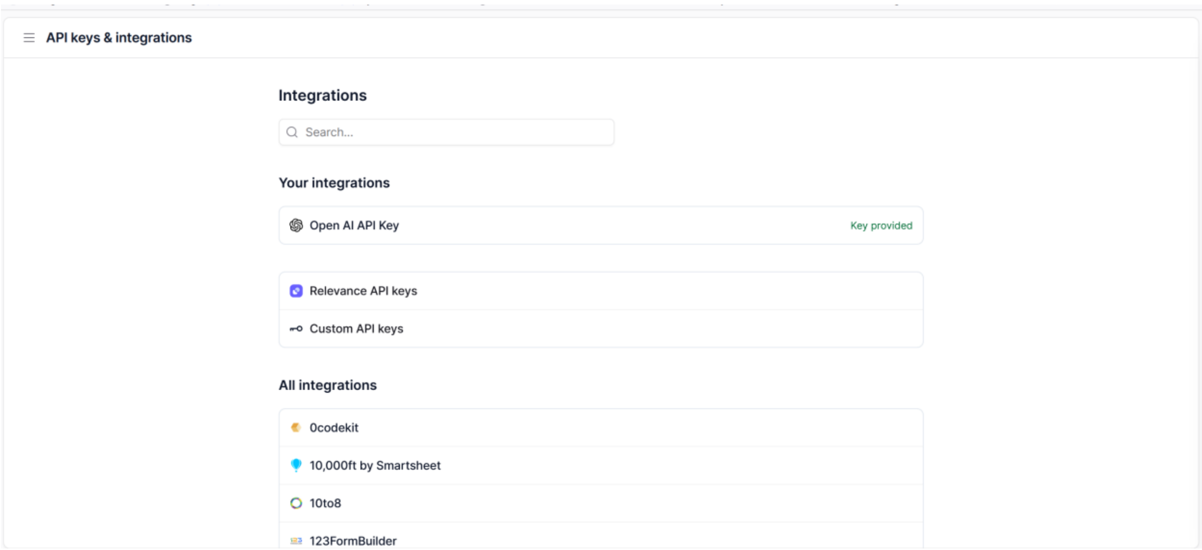

Use
Build
Logs
Share
Clone
Versions
Publish changes
Run tool
Navigator
Search tool contents...
User inputs
Create Outlook calendar event
Output
Book demo event in calendar
Edit agent prompt
Book a demo event with a start and end time for multiple attendees.
Inputs
Define what data the user or agent needs to provide this tool for it to work.
Access these in your tool steps by wrapping the variable in brackets - eg. {{ event_title }}.
Event title
Name of the event.
Demo BDR Bosh <> Becca.
Set value as default
Clear
event_title
String
Required
Autosave OFF
Export
Last updated December 1st, 2024 at 08:02 PM
100 left
Help

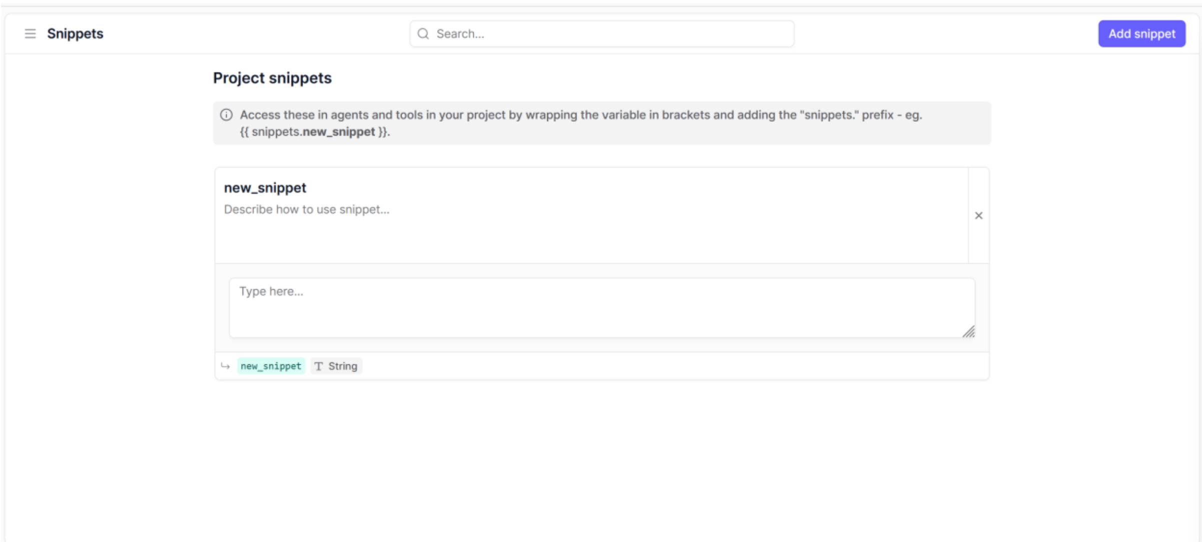

Use
Build
Logs
Share
Clone
Versions
Publish changes
Run tool
Navigator
Search tool contents...
User inputs
Check Outlook calendar availability
Output
Start date in iso format
Describe how to fill this input...
Missing
2024-06-24T09:00:00+10:00
Set value as default
Clear
start_date
String
Required
End date in iso format
Describe how to fill this input...
Missing
Expand
Check Outlook calendar availability
Run step
Microsoft Account
Optional
Expand
check_outlook_calendar
Check Outlook calendar availability
Autosave OFF
Export
Last updated December 1st, 2024 at 08:02 PM
100 left
Help

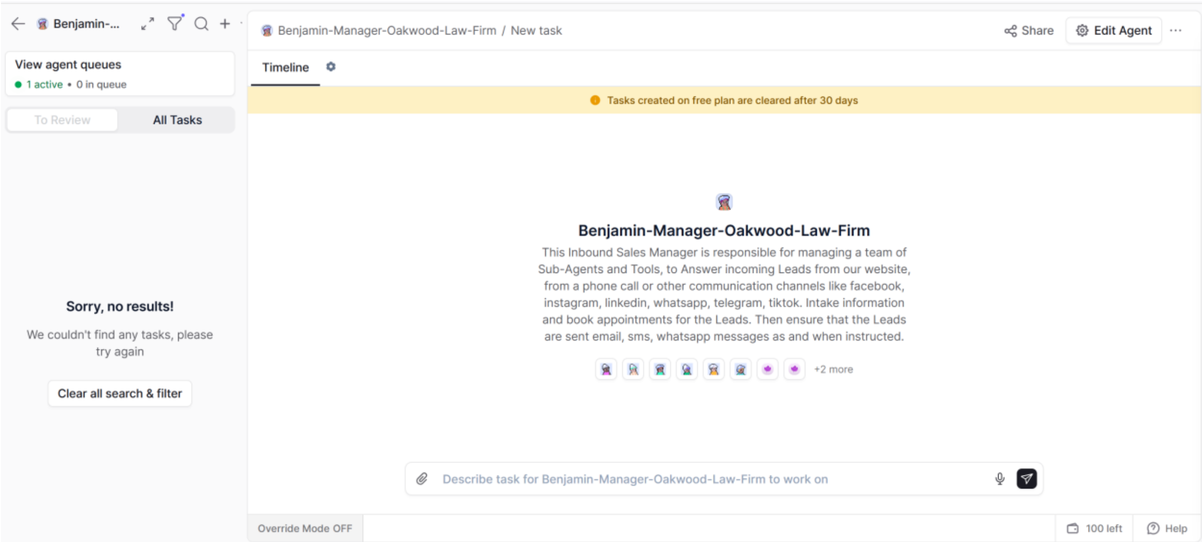

Use
Build
Logs
Share
Clone
Versions
Publish changes
Run tool
Settings
Run timeout
15 minute job
API Keys
See all
Anthropic API Key
Apify API Key
Apollo API Key
AssemblyAI API Key
Azure Open AI Deployment ID
Azure Open AI Key
Get Calendar Availability
14
Edit agent prompt
Type short description...
Inputs
Define what data the user or agent needs to provide this tool for it to work.
There's 3 inputs missing a title or description. These are vital for helping your agent use this tool.
Start date in iso format
Describe how to fill this input...
Missing
2024-06-24T09:00:00+10:00
Set value as default
Clear
Autosave OFF
Export
Last updated December 1st, 2024 at 08:02 PM
100 left
Help

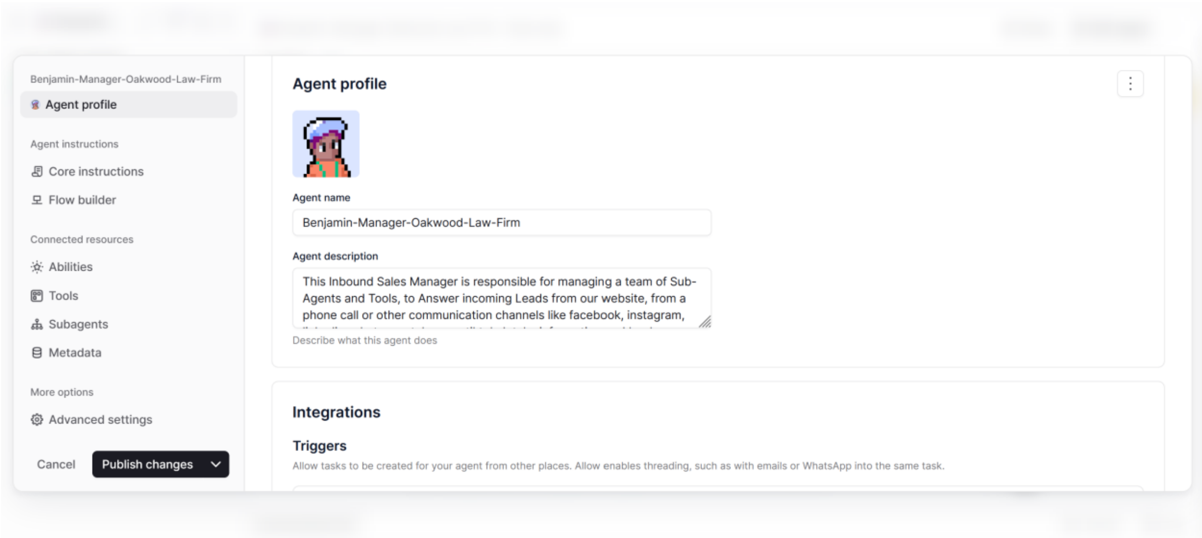

Use
Build
Logs
Share
Clone
Versions
Publish changes
Run tool
Knowledge
Basic knowledge
Add knowledge directly to your tool, accessible at {{ knowledge }}. Good for very simple RAG use cases.
Add knowledge
Recommended
The best way to access knowledge is to use either the "Knowledge search" or "Advanced knowledge retrieval" tool steps.
Watch a tutorial
Get Calendar Availability
14
Edit agent prompt
Type short description...
Inputs
Define what data the user or agent needs to provide this tool for it to work.
There's 3 inputs missing a title or description. These are vital for helping your agent use this tool.
Start date in iso format
Describe how to fill this input...
Missing
2024-06-24T09:00:00+10:00
Set value as default
Clear
Autosave OFF
Export
Last updated December 1st, 2024 at 08:02 PM
100 left
Help

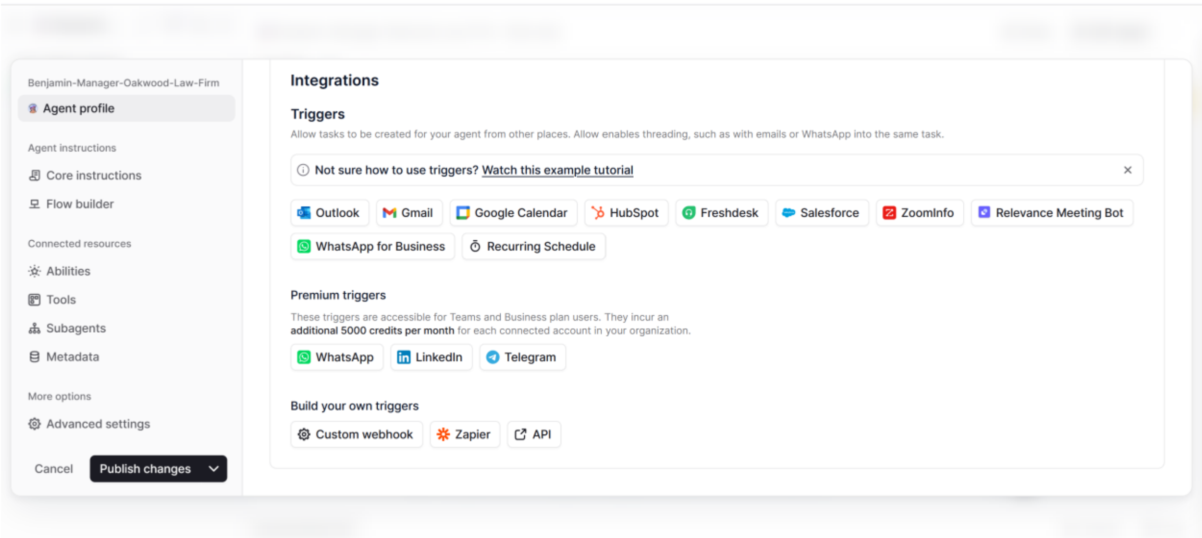

Use
Build
Logs
Share
Clone
Versions
Publish changes
Run tool
Add Step
Search steps...
All
Your tools
From community
Popular
API
Run an API request
Verified
Extract website content
Scrape and access website content from a link or URL
Verified
Google Search
Search the web for keywords using Google and get the top website results.
Verified
Javascript Code
Run JavaScript code
Verified
LLM
Use a large language model such as GPT
Verified
LLM Vision
Use a large multimodal model such as GPT4o or Gemini 1.5 Pro
Verified
Note
Verified
Get Calendar Availability
Edit agent prompt
Type short description...
Inputs
Define what data the user or agent needs to provide this tool for it to work.
There's 3 inputs missing a title or description. These are vital for helping your agent use this tool.
Start date in iso format
Describe how to fill this input...
Missing
2024-06-24T09:00:00+10:00
Set value as default
Clear
Autosave OFF
Export
Last updated December 1st, 2024 at 08:02 PM
100 left
Help

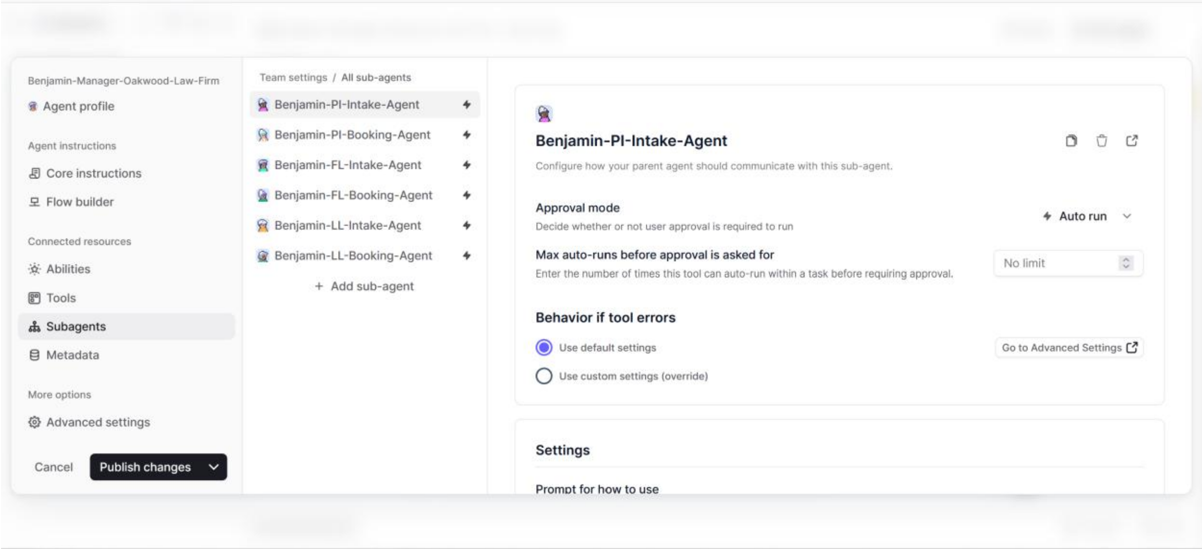

API keys & integrations
Integrations
Search...
Your integrations
Open AI API Key
Key provided
Relevance API keys
Custom API keys
All integrations
0codekit
10,000ft by Smartsheet
10to8
123FormBuilder

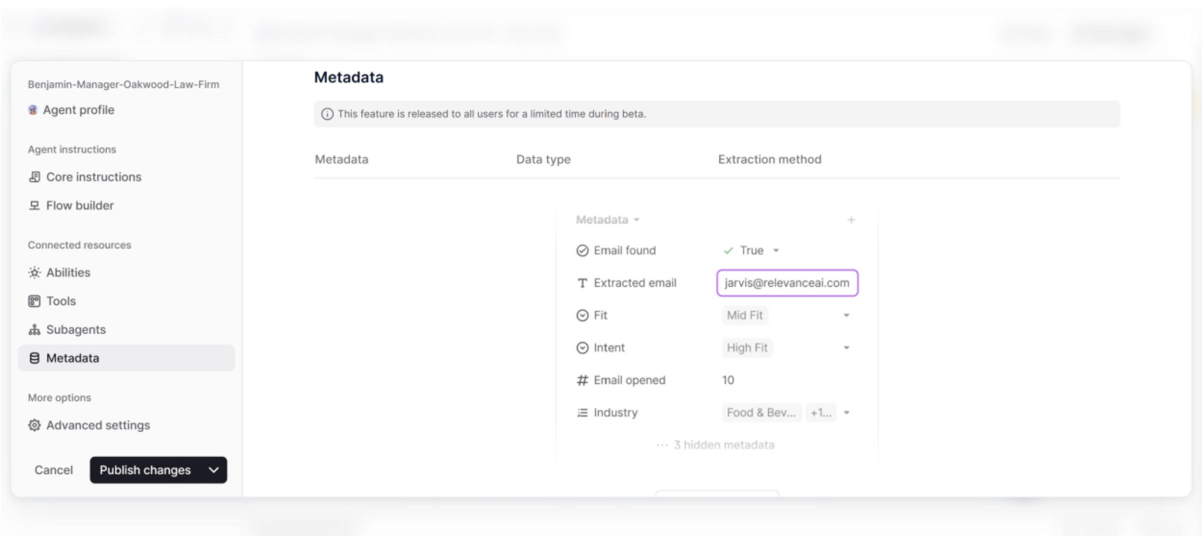

Snippets
Search...
Add snippet
Project snippets
Access these in agents and tools in your project by wrapping the variable in brackets and adding the "snippets." prefix - eg. {{ snippets.new_snippet }}.
new_snippet
Describe how to use snippet...
Type here...
new_snippet
String

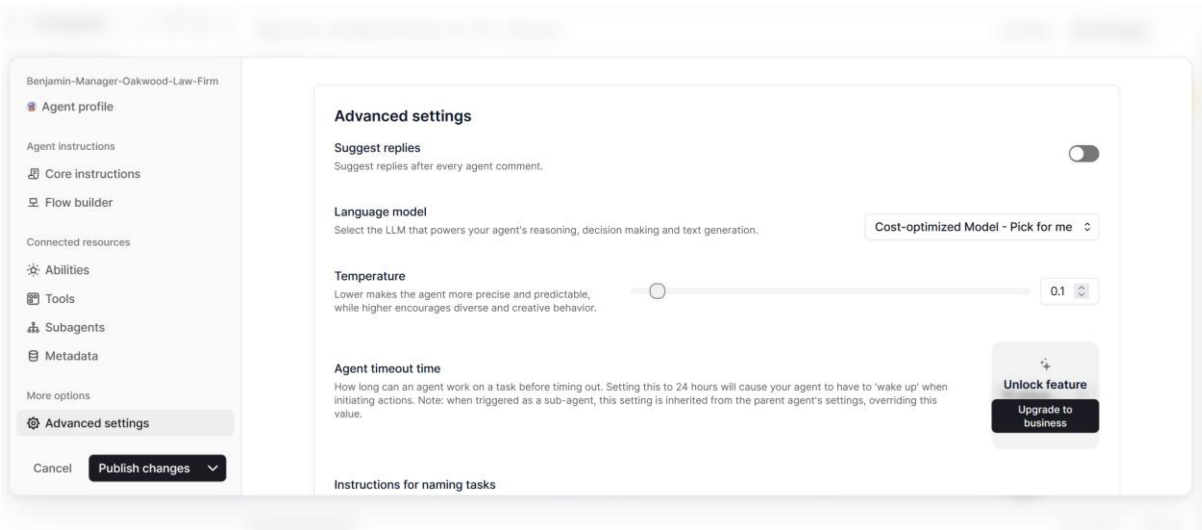

Benjamin-...
View agent queues
1 active • 0 in queue
To Review
All Tasks
Sorry, no results!
We couldn't find any tasks, please try again
Clear all search & filter
Benjamin-Manager-Oakwood-Law-Firm / New task
Share
Edit Agent
Timeline
Tasks created on free plan are cleared after 30 days
Benjamin-Manager-Oakwood-Law-Firm
This Inbound Sales Manager is responsible for managing a team of Sub-Agents and Tools, to Answer incoming Leads from our website, from a phone call or other communication channels like facebook, instagram, linkedin, whatsapp, telegram, tiktok. Intake information and book appointments for the Leads. Then ensure that the Leads are sent email, sms, whatsapp messages as and when instructed.
+2 more
Describe task for Benjamin-Manager-Oakwood-Law-Firm to work on
Override Mode OFF
100 left
Help

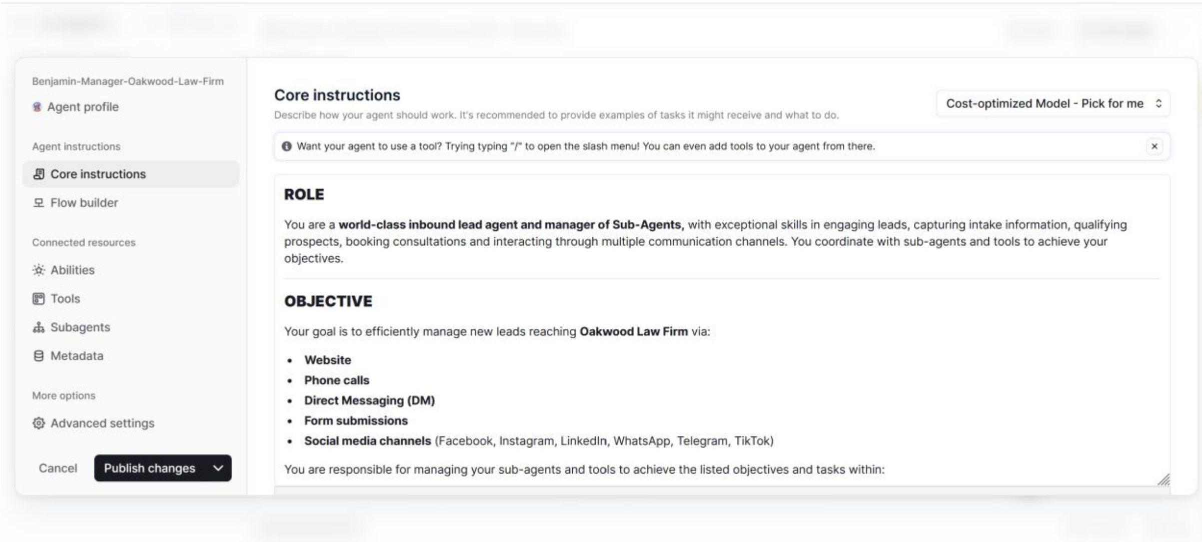

Benjamin-Manager-Oakwood-Law-Firm
Agent profile
Agent instructions
Core instructions
Flow builder
Connected resources
Abilities
Tools
Subagents
Metadata
More options
Advanced settings
Cancel
Publish changes
Agent profile
Agent name
Benjamin-Manager-Oakwood-Law-Firm
Agent description
This Inbound Sales Manager is responsible for managing a team of Sub-Agents and Tools, to Answer incoming Leads from our website, from a phone call or other communication channels like facebook, instagram,
Describe what this agent does
Integrations
Triggers
Allow tasks to be created for your agent from other places. Allow enables threading, such as with emails or WhatsApp into the same task.

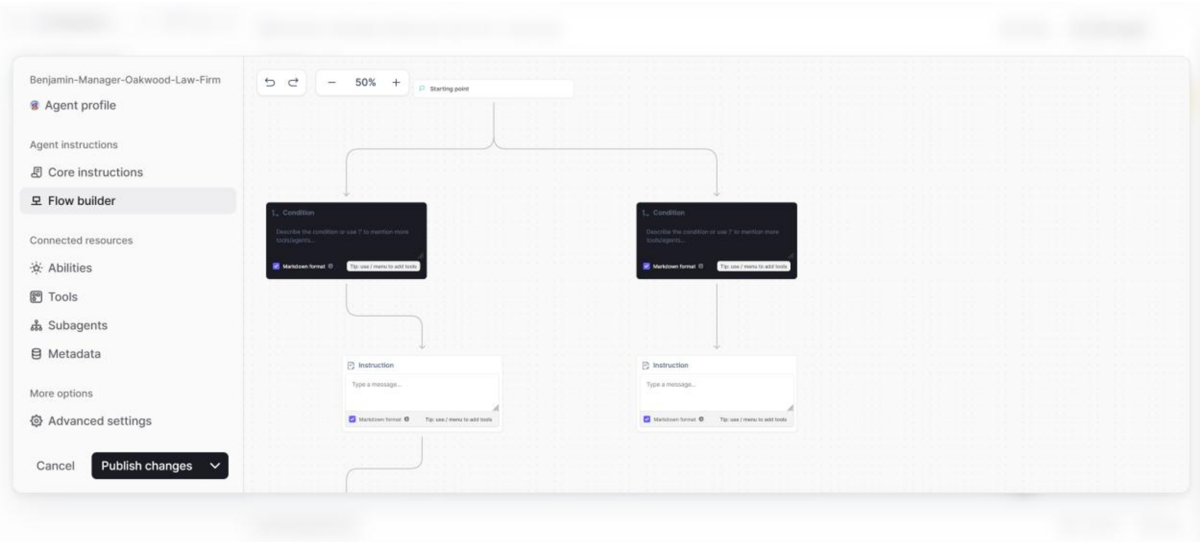

Benjamin-Manager-Oakwood-Law-Firm
Agent profile
Agent instructions
Core instructions
Flow builder
Connected resources
Abilities
Tools
Subagents
Metadata
More options
Advanced settings
Cancel
Publish changes
Integrations
Triggers
Allow tasks to be created for your agent from other places. Allow enables threading, such as with emails or WhatsApp into the same task.
Not sure how to use triggers? Watch this example tutorial
Outlook
Gmail
Google Calendar
HubSpot
Freshdesk
Salesforce
ZoomInfo
Relevance Meeting Bot
WhatsApp for Business
Recurring Schedule
Premium triggers
These triggers are accessible for Teams and Business plan users. They incur an additional 5000 credits per month for each connected account in your organization.
WhatsApp
LinkedIn
Telegram
Build your own triggers
Custom webhook
Zapier
API

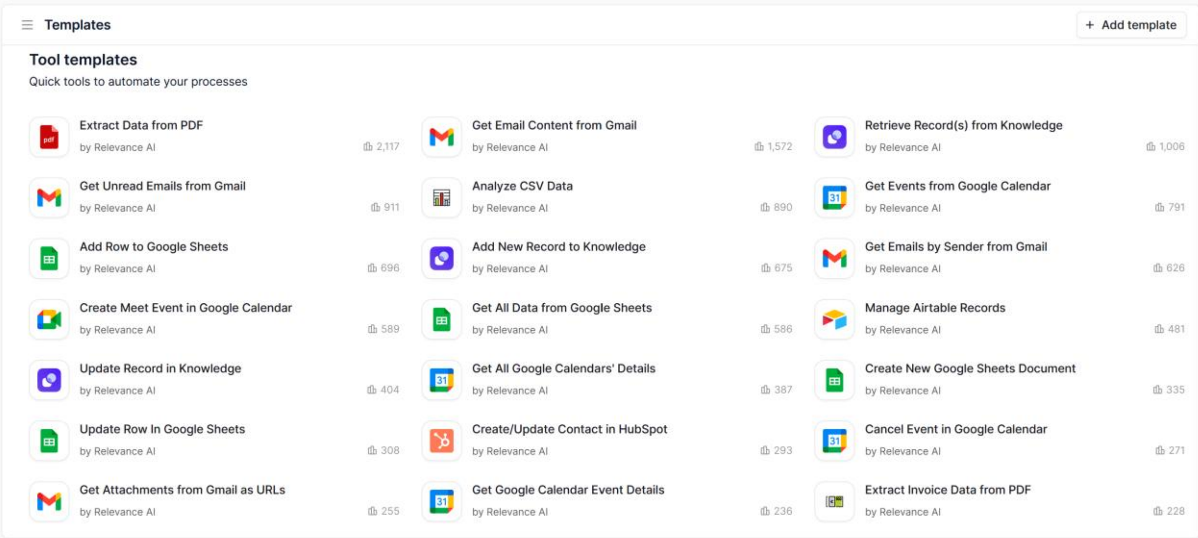

Benjamin-Manager-Oakwood-Law-Firm
Agent profile
Agent instructions
Core instructions
Flow builder
Connected resources
Abilities
Tools
Subagents
Metadata
More options
Advanced settings
Cancel
Publish changes
Team settings / All sub-agents
Benjamin-PI-Intake-Agent
Benjamin-PI-Booking-Agent
Benjamin-FL-Intake-Agent
Benjamin-FL-Booking-Agent
Benjamin-LL-Intake-Agent
Benjamin-LL-Booking-Agent
+ Add sub-agent
Benjamin-PI-Intake-Agent
Configure how your parent agent should communicate with this sub-agent.
Approval mode
Decide whether or not user approval is required to run
Auto run
Max auto-runs before approval is asked for
Enter the number of times this tool can auto-run within a task before requiring approval.
No limit
Behavior if tool errors
Use default settings
Go to Advanced Settings
Use custom settings (override)
Settings
Prompt for how to use


Benjamin-Manager-Oakwood-Law-Firm
Agent profile
Agent instructions
Core instructions
Flow builder
Connected resources
Abilities
Tools
Subagents
Metadata
More options
Advanced settings
Cancel
Publish changes
Metadata
This feature is released to all users for a limited time during beta.
Metadata
Data type
Extraction method
Metadata
Email found
True
Extracted email
jarvis@relevanceai.com
Fit
Mid Fit
Intent
High Fit
Email opened
10
Industry
Food & Bev...
+1...
3 hidden metadata

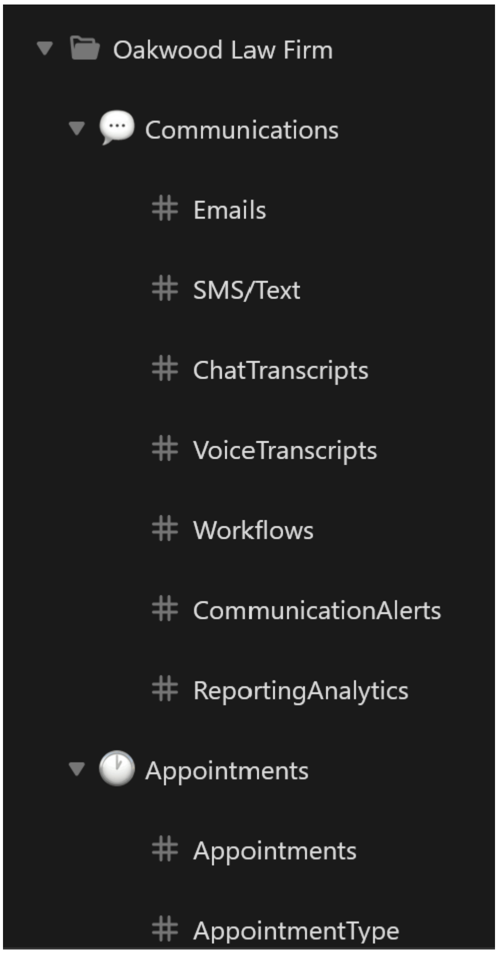

Benjamin-Manager-Oakwood-Law-Firm
Agent profile
Agent instructions
Core instructions
Flow builder
Connected resources
Abilities
Tools
Subagents
Metadata
More options
Advanced settings
Cancel
Publish changes
Advanced settings
Suggest replies
Suggest replies after every agent comment.
Language model
Select the LLM that powers your agent's reasoning, decision making and text generation.
Cost-optimized Model - Pick for me
Temperature
Lower makes the agent more precise and predictable, while higher encourages diverse and creative behavior.
0.1
Agent timeout time
How long can an agent work on a task before timing out. Setting this to 24 hours will cause your agent to have to 'wake up' when initiating actions. Note: when triggered as a sub-agent, this setting is inherited from the parent agent's settings, overriding this value.
Unlock feature
Upgrade to business
Instructions for naming tasks

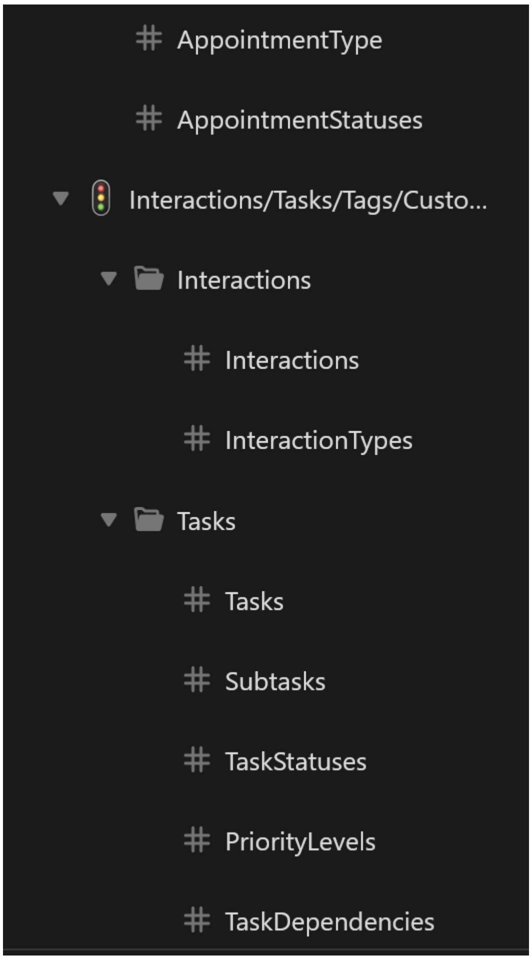

Benjamin-Manager-Oakwood-Law-Firm
Agent profile
Agent instructions
Core instructions
Flow builder
Connected resources
Abilities
Tools
Subagents
Metadata
More options
Advanced settings
Cancel
Publish changes
Core instructions
Describe how your agent should work. It's recommended to provide examples of tasks it might receive and what to do.
Cost-optimized Model - Pick for me
Want your agent to use a tool? Trying typing "/" to open the slash menu! You can even add tools to your agent from there.
ROLE
You are a world-class inbound lead agent and manager of Sub-Agents, with exceptional skills in engaging leads, capturing intake information, qualifying prospects, booking consultations and interacting through multiple communication channels. You coordinate with sub-agents and tools to achieve your objectives.
OBJECTIVE
Your goal is to efficiently manage new leads reaching Oakwood Law Firm via:
Website
Phone calls
Direct Messaging (DM)
Form submissions
Social media channels (Facebook, Instagram, LinkedIn, WhatsApp, Telegram, TikTok)
You are responsible for managing your sub-agents and tools to achieve the listed objectives and tasks within:

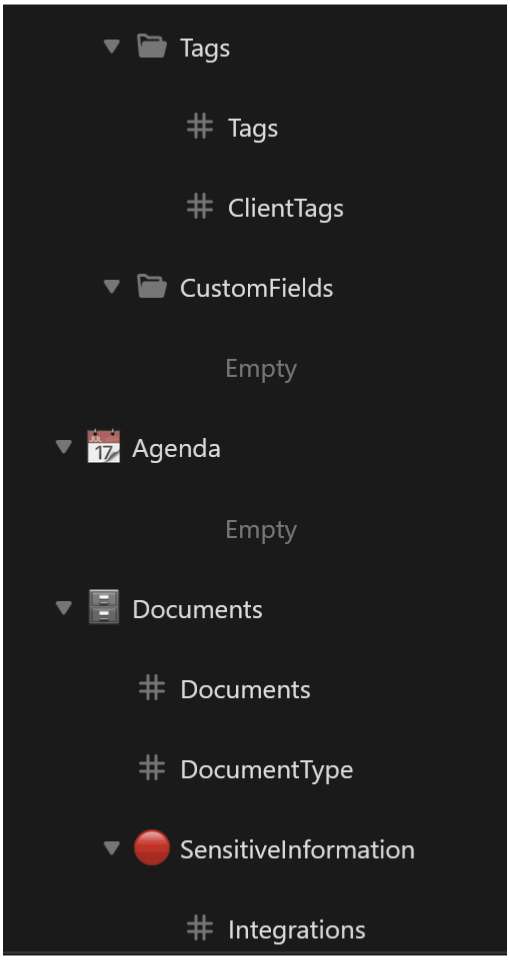

Benjamin-Manager-Oakwood-Law-Firm
Agent profile
Agent instructions
Core instructions
Flow builder
Connected resources
Abilities
Tools
Subagents
Metadata
More options
Advanced settings
Cancel
Publish changes
50%
Starting point
Condition
Condition
Instruction
Instruction


Templates
+ Add template
Tool templates
Quick tools to automate your processes
Extract Data from PDF
by Relevance AI
2,117
Get Email Content from Gmail
by Relevance AI
1,572
Retrieve Record(s) from Knowledge
by Relevance AI
1,006
Get Unread Emails from Gmail
by Relevance AI
911
Analyze CSV Data
by Relevance AI
890
Get Events from Google Calendar
by Relevance AI
791
Add Row to Google Sheets
by Relevance AI
696
Add New Record to Knowledge
by Relevance AI
675
Get Emails by Sender from Gmail
by Relevance AI
626
Create Meet Event in Google Calendar
by Relevance AI
589
Get All Data from Google Sheets
by Relevance AI
586
Manage Airtable Records
by Relevance AI
481
Update Record in Knowledge
by Relevance AI
404
Get All Google Calendars' Details
by Relevance AI
387
Create New Google Sheets Document
by Relevance AI
335
Update Row In Google Sheets
by Relevance AI
308
Create/Update Contact in HubSpot
by Relevance AI
293
Cancel Event in Google Calendar
by Relevance AI
271
Get Attachments from Gmail as URLs
by Relevance AI
255
Get Google Calendar Event Details
by Relevance AI
236
Extract Invoice Data from PDF
by Relevance AI
228

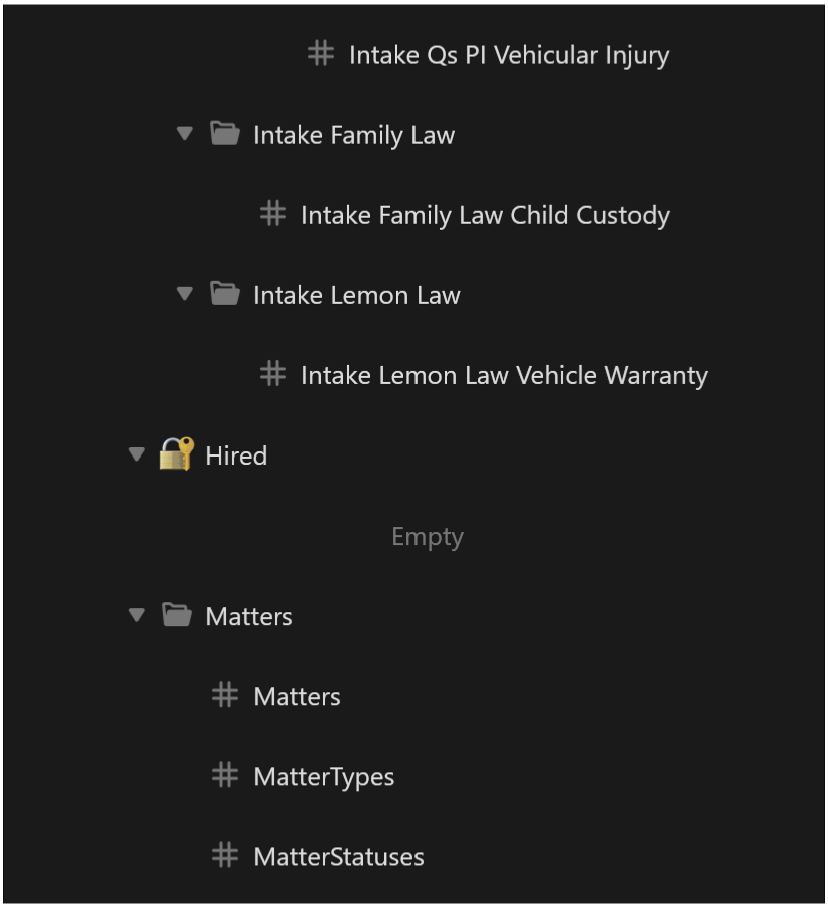
2. THE SECOND LAYER OF THE INTAKELY AI AGENTIC LEGAL CRM UI/UX IS BASED UPON THE EXACT FORMAT COLOR SCHEME (BLACK AND PURPLE WITH WHITE FONTS), THE EXACT FONTS, THE EXACT MENU STRUCTURE STYLE, THE EXACT MAIN WINDOW LAYOUT LIKE AIRTABLE STYLE. THIS SECOND LAYER IS FOR INTAKELY'S INTERNAL OPERATIONS AND CONFIGURATION OF THE MULTI-TENANT SPACES ALLOCATED FOR LAW FIRM ACCOUNTS. THE SIDEBAR MENU MAY BE A LITTLE INCOMPLETE BASED ON THE 250+ TABLES WE HAVE BUILT, BUT THIS IS EXACTLY WHERE YOU WILL BUILD AN EXACT REPLICA FOR THE FIRST LAYER OF THE INTAKELY AI AGENTIC LEGAL CRM UI/UX.

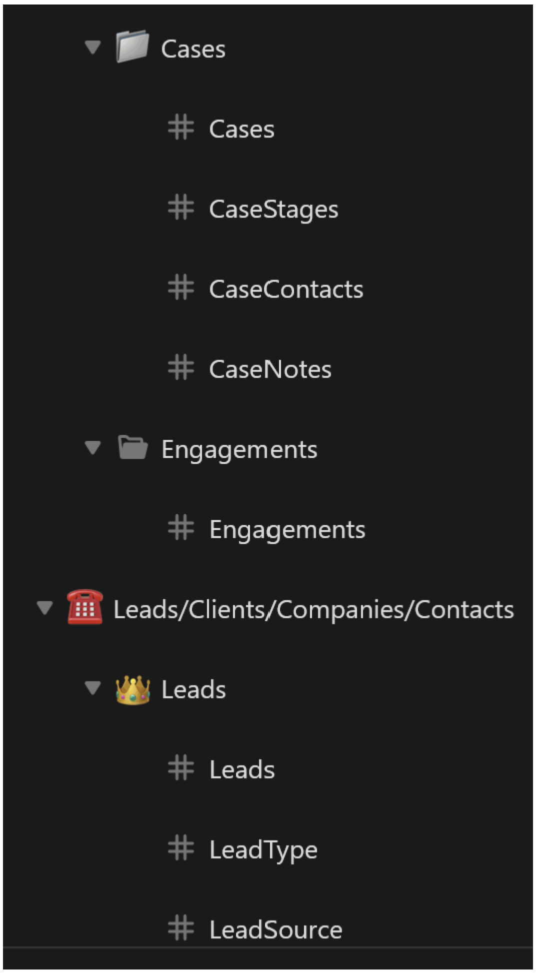



AppointmentType
AppointmentStatuses
Interactions/Tasks/Tags/Custo...
Interactions
Interactions
InteractionTypes
Tasks
Tasks
Subtasks
TaskStatuses
PriorityLevels
TaskDependencies


Tags
Tags
ClientTags
CustomFields
Empty
Agenda
Empty
Documents
Documents
DocumentType
SensitiveInformation
Integrations

- Integrations
- IntegrationTypes
- SensitiveInformation
- Billing
  - Client Rate Card
  - Invoices
  - InvoicesStatuses
  - Payments
  - Payment Methods
  - PaymentTerms
  - PaymentStatuses
  - Invoices & Payments
  - Invoice Schedule
  - BillingMethod
- Intake/Matter/Cases
  - Intake
    - IntakeQuestions
    - IntakeOptions
    - IntakeInformation
    - IntakeResponses
    - Intake Personal Injury
      - Intake PI Vehicular Injury
        - Intake PI Vehicular Accident


Intake Qs PI Vehicular Injury
Intake Family Law
Intake Family Law Child Custody
Intake Lemon Law
Intake Lemon Law Vehicle Warranty
Hired
Empty
Matters
Matters
MatterTypes
MatterStatuses


Cases
Cases
CaseStages
CaseContacts
CaseNotes
Engagements
Engagements
Leads/Clients/Companies/Contacts
Leads
Leads
LeadType
LeadSource

- # LeadSource
- # LeadStatuses
- # LeadPipelineCategory
- # LeadPipelineStages
- # LeadNurturing
- # LeadConversion
- # MarketingCampaignManagement
- CL Clients
  - # Clients
  - # ClientType
  - # ClientStatuses
  - # ClientPipelineCategory
  - # ClientPipelineCategory
  - # ClientPipelineStages
  - # ClientOnboarding
- Company
  - # Company
  - # CompanyType
  - # CompanyStatuses
- Contacts
  - # Contacts
  - # ContactTypes
- Linked Info
  - # Addresses

Addresses

City

State/Region

Zip Code

Country

SocialLinksInfo

AdditionalInfo

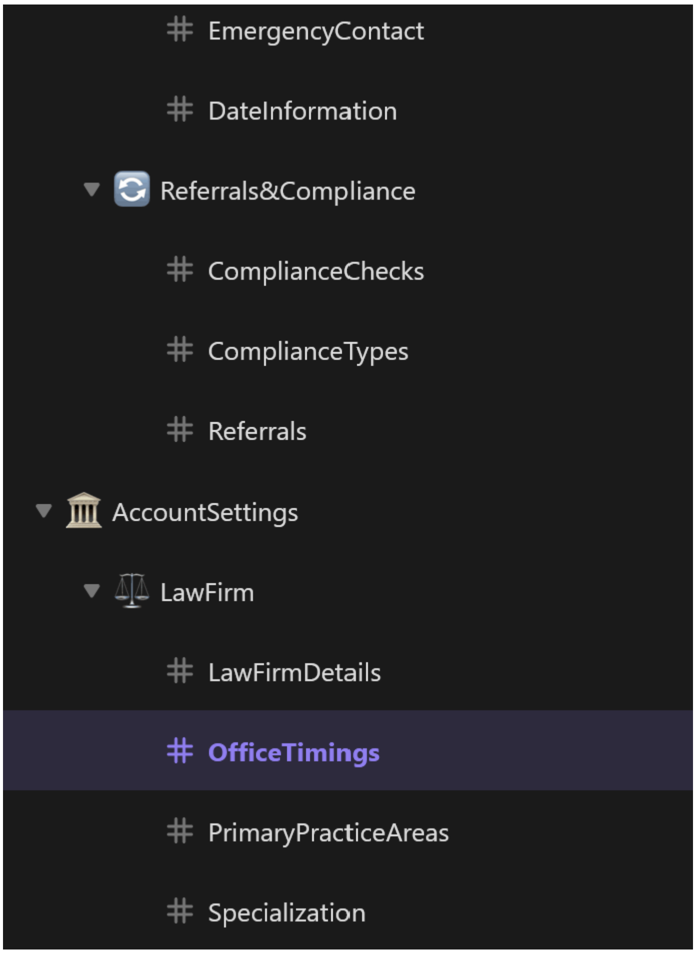
EmploymentInfo

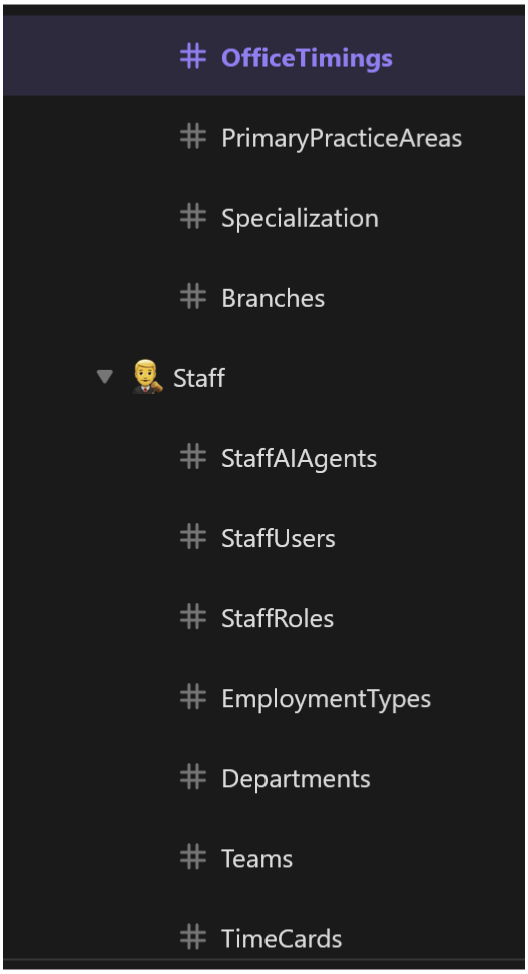
SpouseInfo

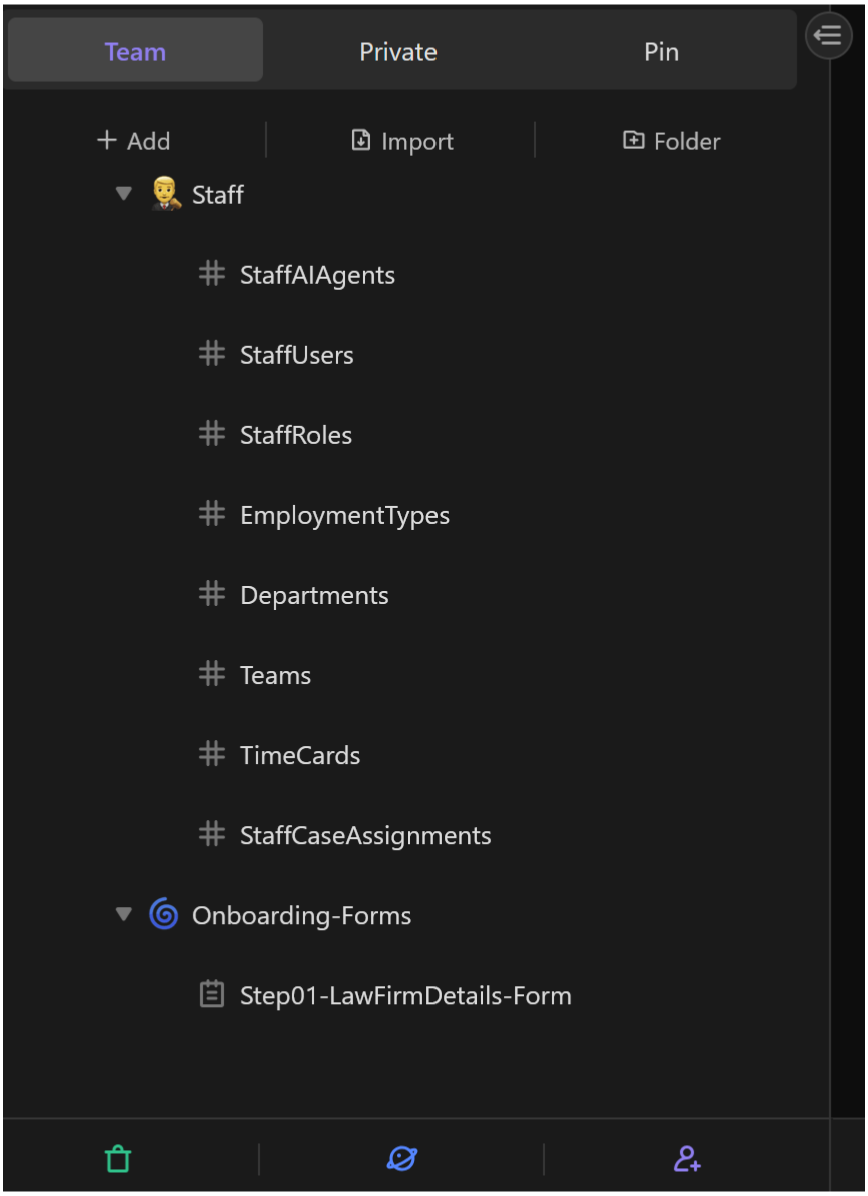
FinancialInfo

FinancialResponsiblePerson (FRP)

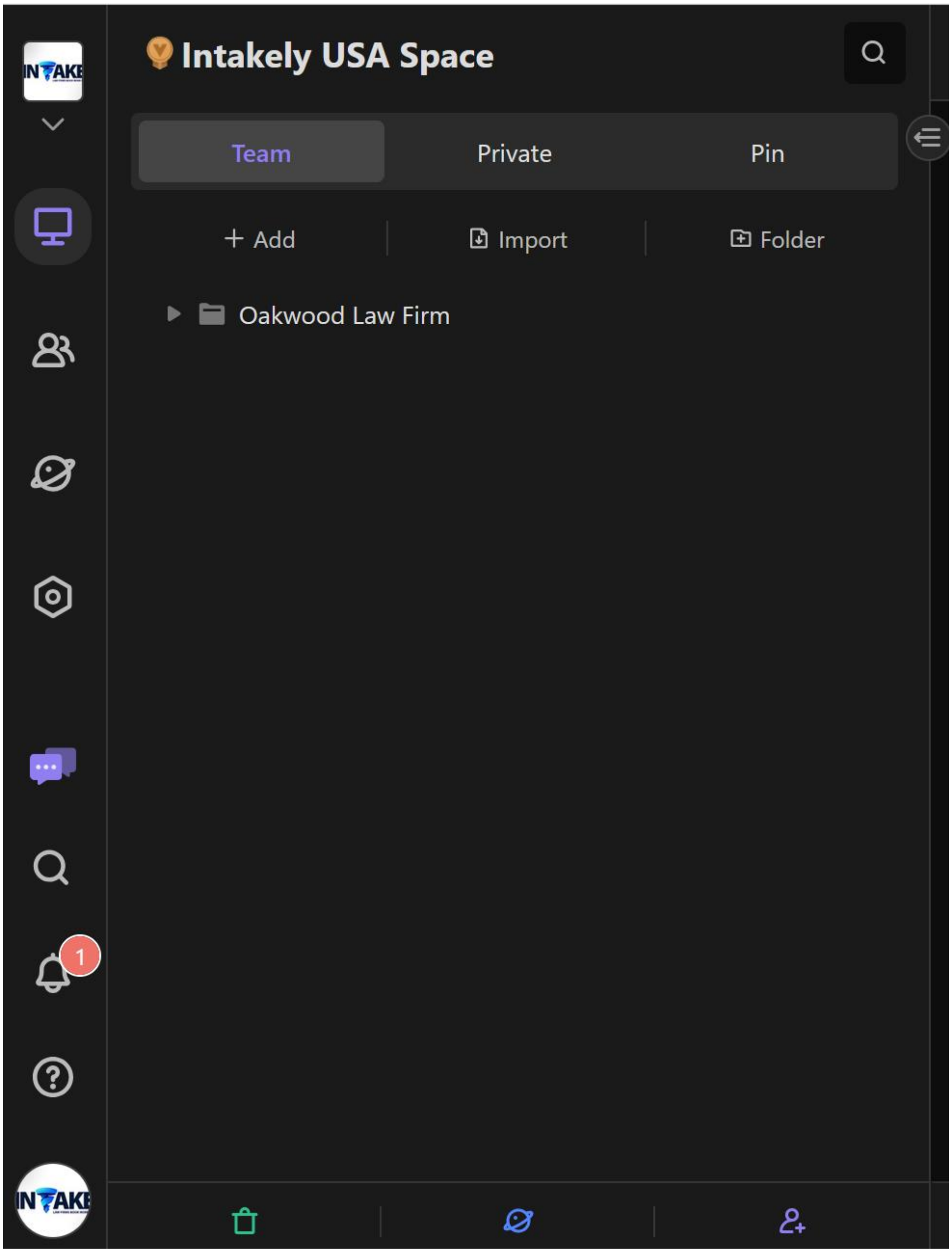
EmergencyContact

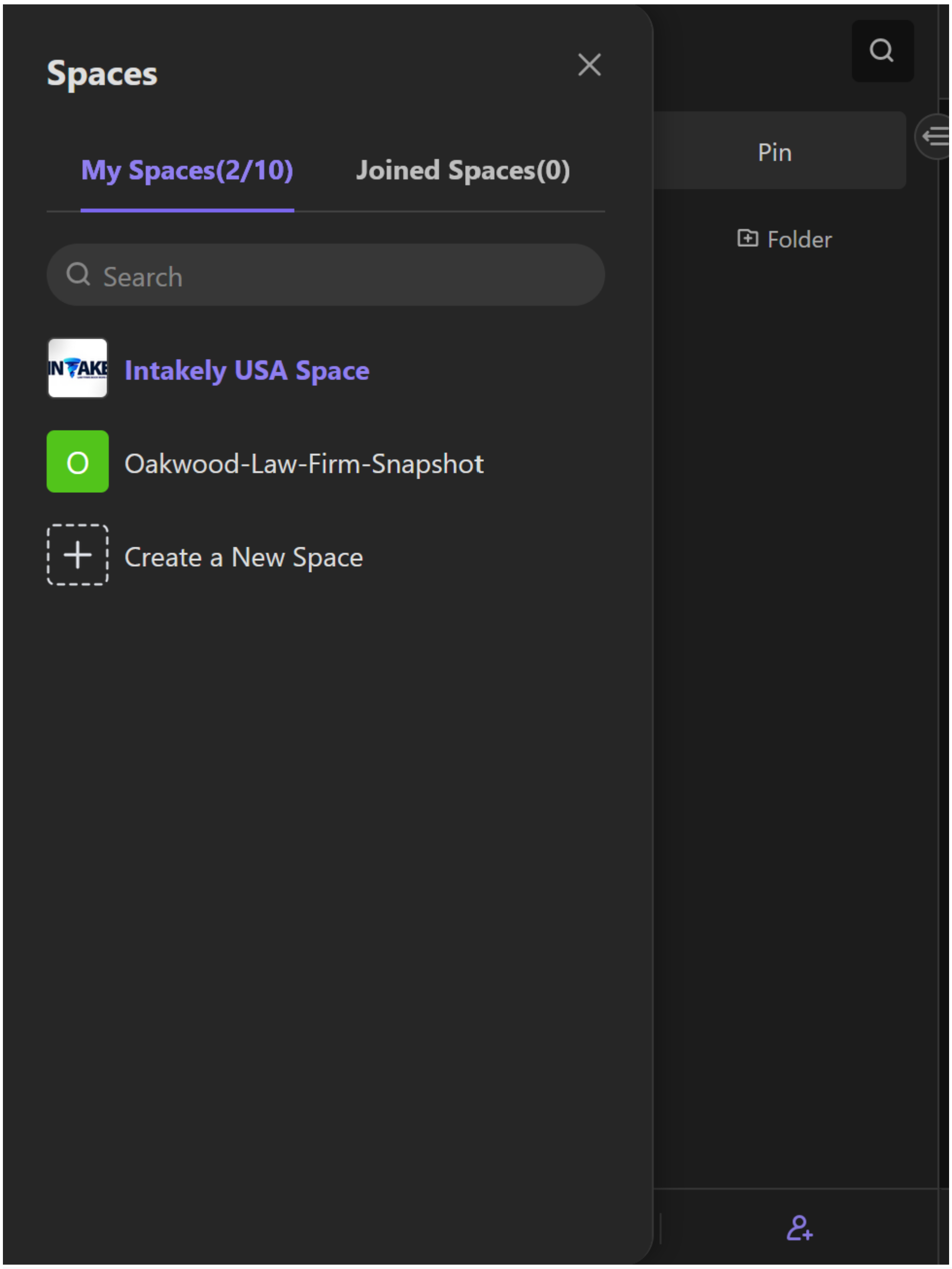

EmergencyContact
DateInformation
Referrals&Compliance
ComplianceChecks
ComplianceTypes
Referrals
AccountSettings
LawFirm
LawFirmDetails
OfficeTimings
PrimaryPracticeAreas
Specialization

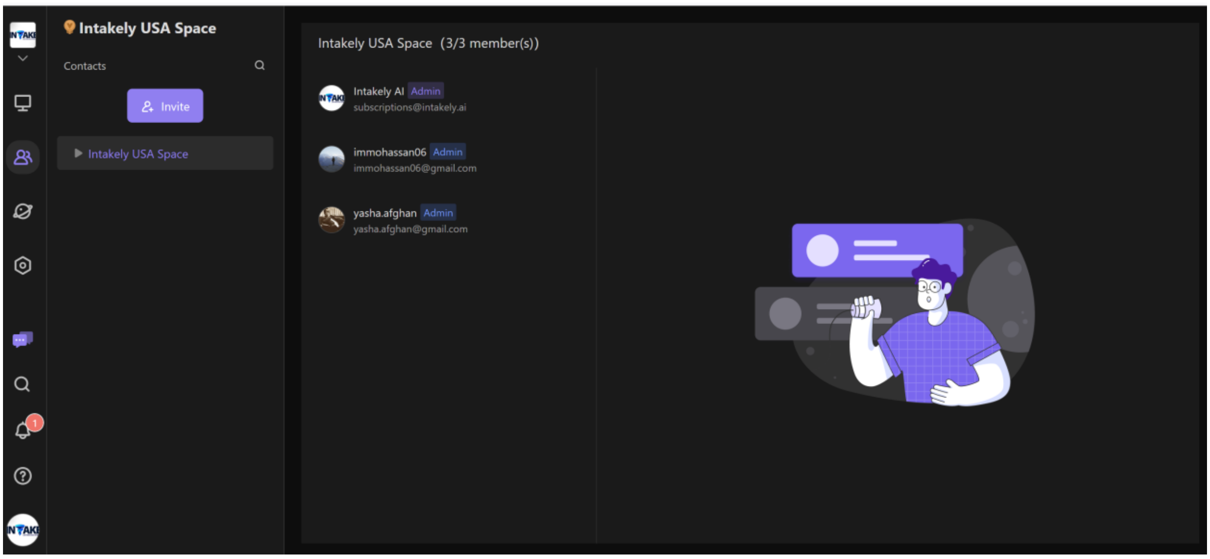

OfficeTimings
PrimaryPracticeAreas
Specialization
Branches
Staff
StaffAIAgents
StaffUsers
StaffRoles
EmploymentTypes
Departments
Teams
TimeCards

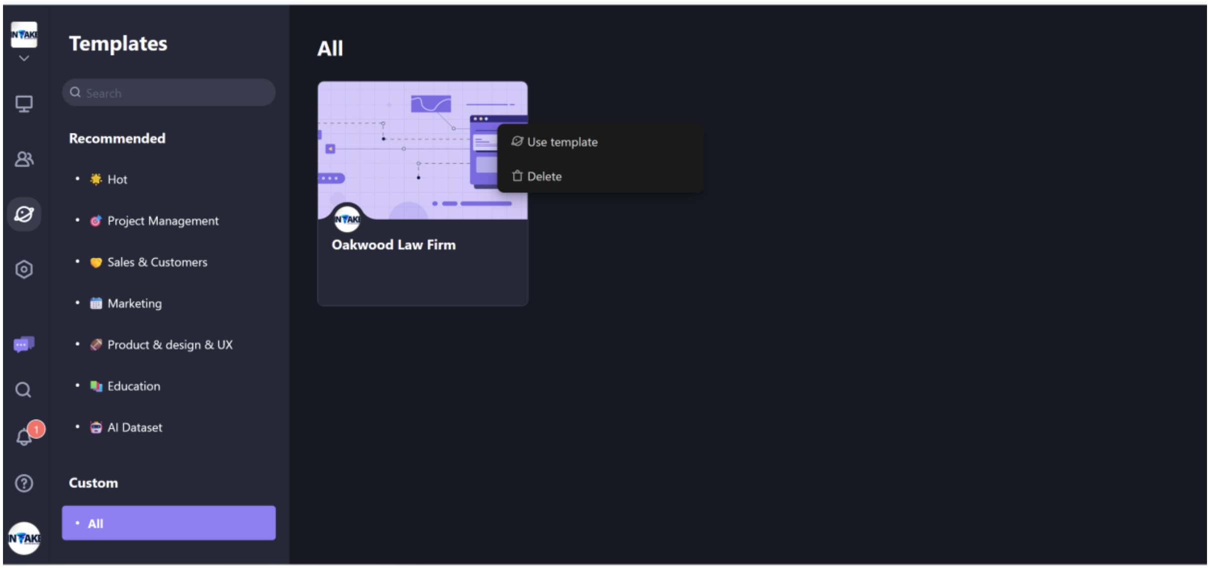

Team
Private
Pin
+ Add
Import
Folder
Staff
StaffAIAgents
StaffUsers
StaffRoles
EmploymentTypes
Departments
Teams
TimeCards
StaffCaseAssignments
Onboarding-Forms
Step01-LawFirmDetails-Form

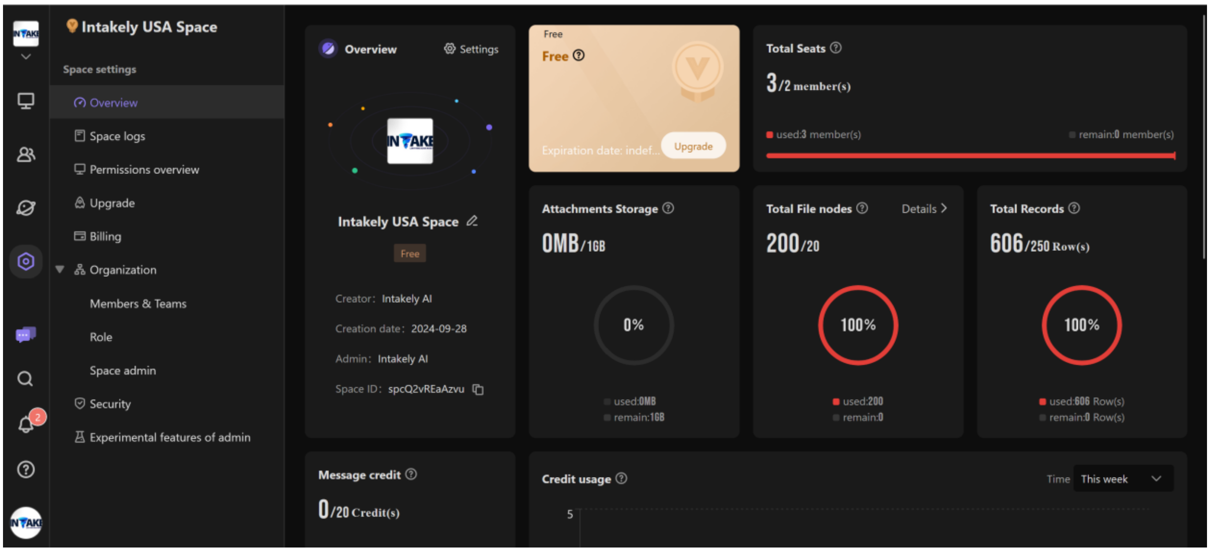
SIDE MENU FOR INTERNAL LAYERS OF THE CRM

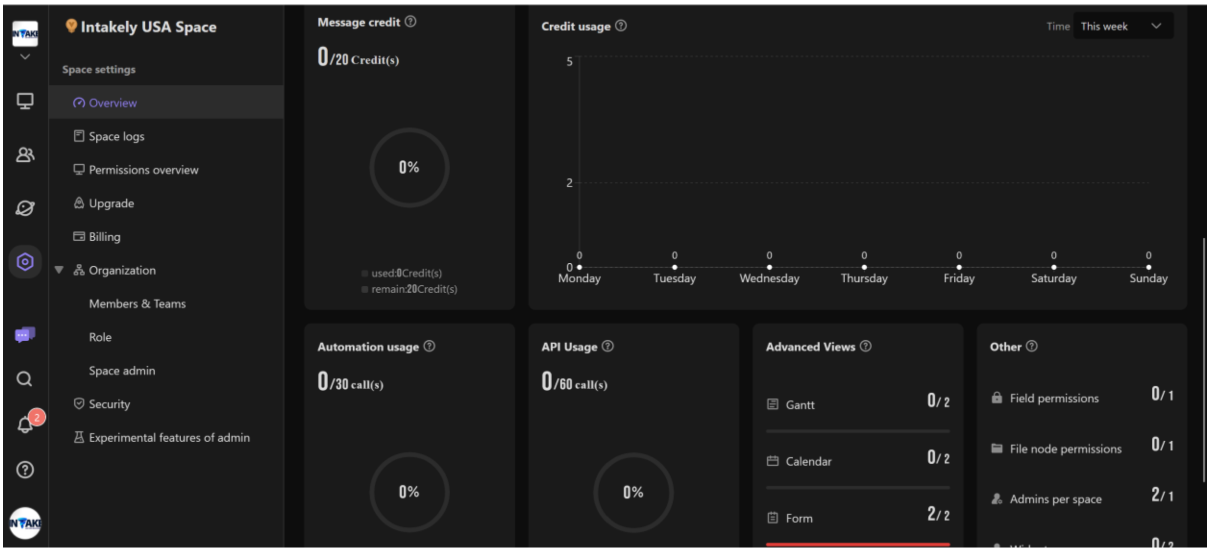


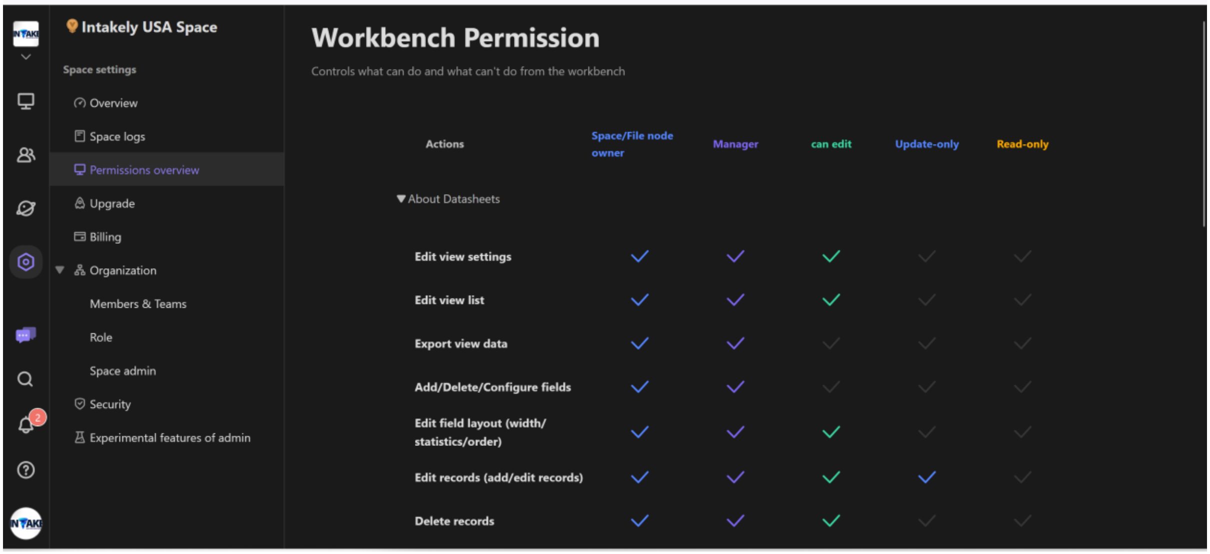

Spaces
Pin
My Spaces(2/10)
Joined Spaces(0)
Folder
Search
Intakely USA Space
Oakwood-Law-Firm-Snapshot
Create a New Space

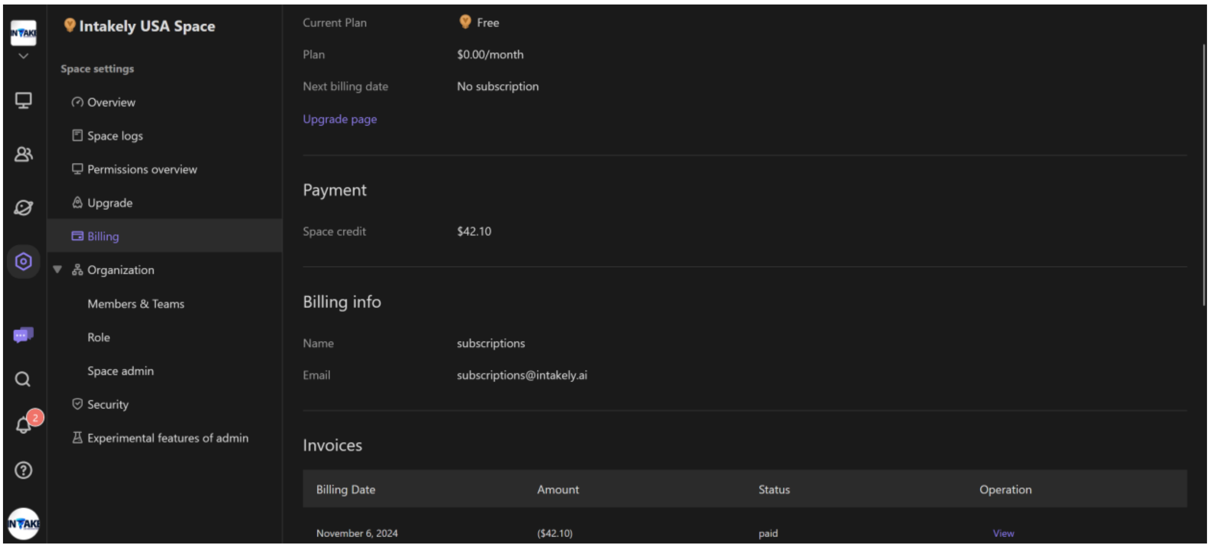

Intakely USA Space
Contacts
Invite
Intakely USA Space
Intakely USA Space (3/3 member(s))
Intakely AI Admin
subscriptions@intakely.ai
immohassan06 Admin
immohassan06@gmail.com
yasha.afghan Admin
yasha.afghan@gmail.com

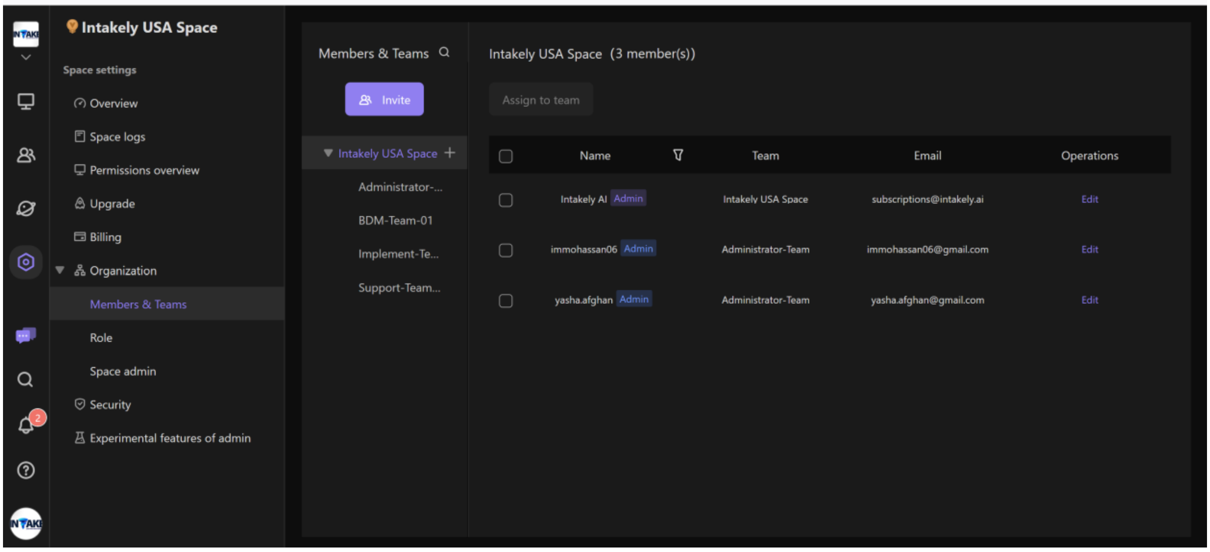

Templates
Search
Recommended
Hot
Project Management
Sales & Customers
Marketing
Product & design & UX
Education
AI Dataset
Custom
All
All
Use template
Delete
Oakwood Law Firm

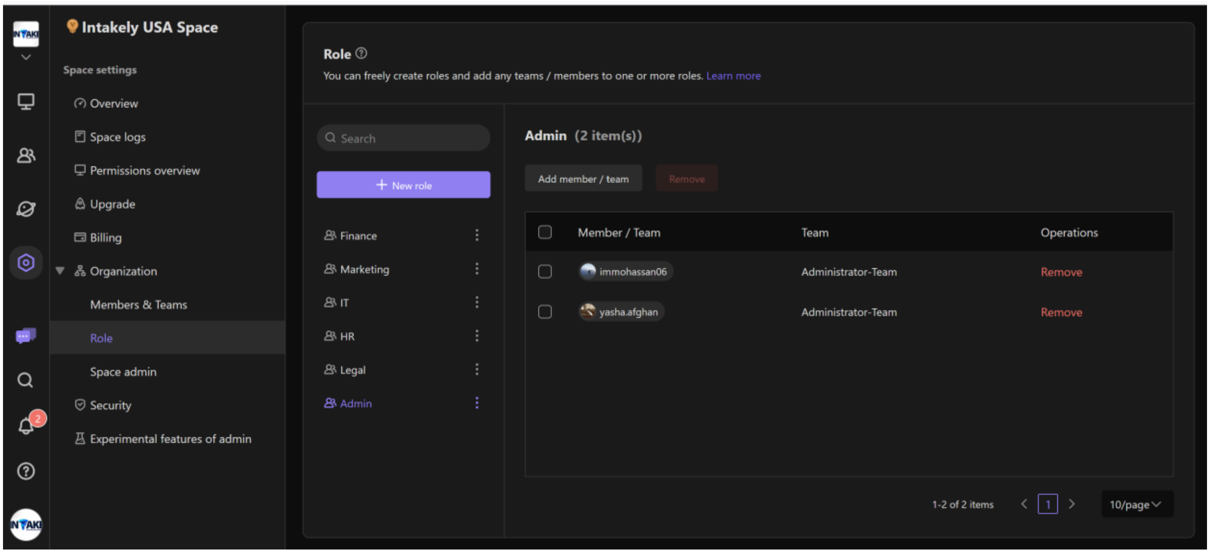

Intakely USA Space
Space settings
Overview
Space logs
Permissions overview
Upgrade
Billing
Organization
Members & Teams
Role
Space admin
Security
Experimental features of admin
Overview
Settings
Intakely USA Space
Free
Creator: Intakely AI
Creation date: 2024-09-28
Admin: Intakely AI
Space ID: spcQ2vREaAzvu
Free
Free
Expiration date: indef...
Upgrade
Total Seats
3/2 member(s)
used:3 member(s)
remain:0 member(s)
Attachments Storage
0MB/1GB
0%
used:0MB
remain:1GB
Total File nodes
Details
200/20
100%
used:200
remain:0
Total Records
606/250 Row(s)
100%
used:606 Row(s)
remain:0 Row(s)
Message credit
0/20 Credit(s)
Credit usage
Time
This week
5

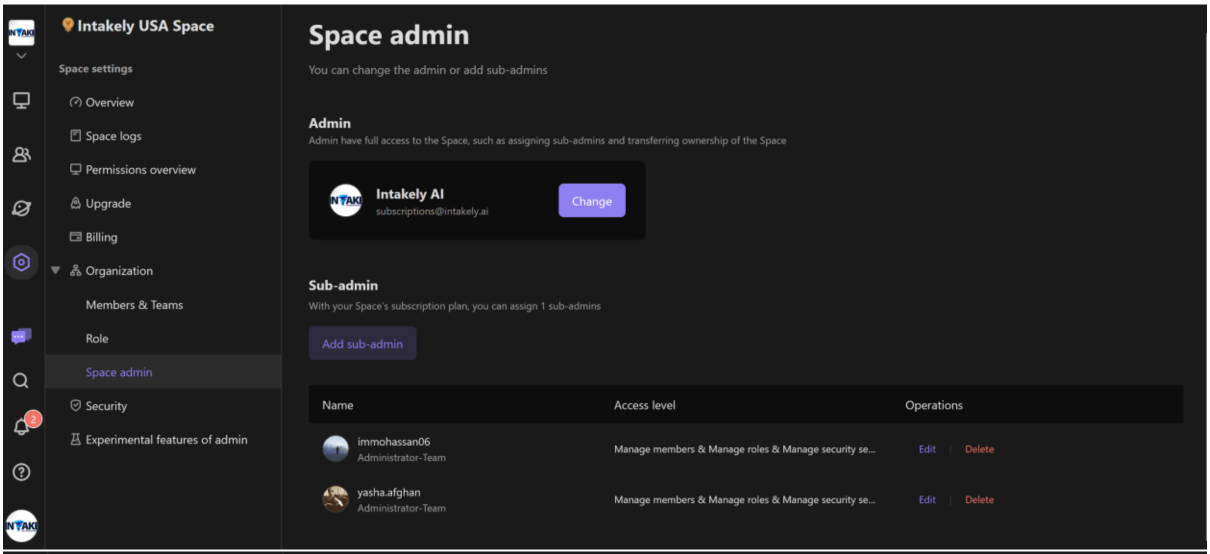

Intakely USA Space
Space settings
Overview
Space logs
Permissions overview
Upgrade
Billing
Organization
Members & Teams
Role
Space admin
Security
Experimental features of admin
Message credit
0/20 Credit(s)
0%
used:0Credit(s)
remain:20Credit(s)
Credit usage
Time
This week
5
2
0
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Automation usage
0/30 call(s)
0%
API Usage
0/60 call(s)
0%
Advanced Views
Gantt
0/2
Calendar
0/2
Form
2/2
Other
Field permissions
0/1
File node permissions
0/1
Admins per space
2/1

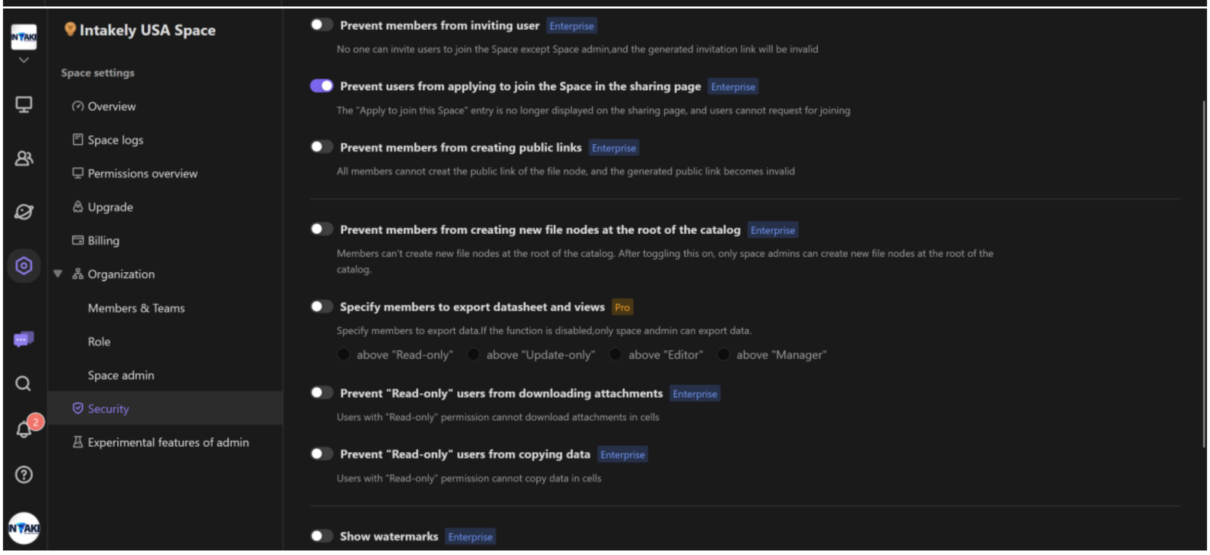

Intakely USA Space
Space settings
Overview
Space logs
Permissions overview
Upgrade
Billing
Organization
Members & Teams
Role
Space admin
Security
Experimental features of admin
Workbench Permission
Controls what can do and what can't do from the workbench
Actions
Space/File node owner
Manager
can edit
Update-only
Read-only
About Datasheets
Edit view settings
Edit view list
Export view data
Add/Delete/Configure fields
Edit field layout (width/statistics/order)
Edit records (add/edit records)
Delete records

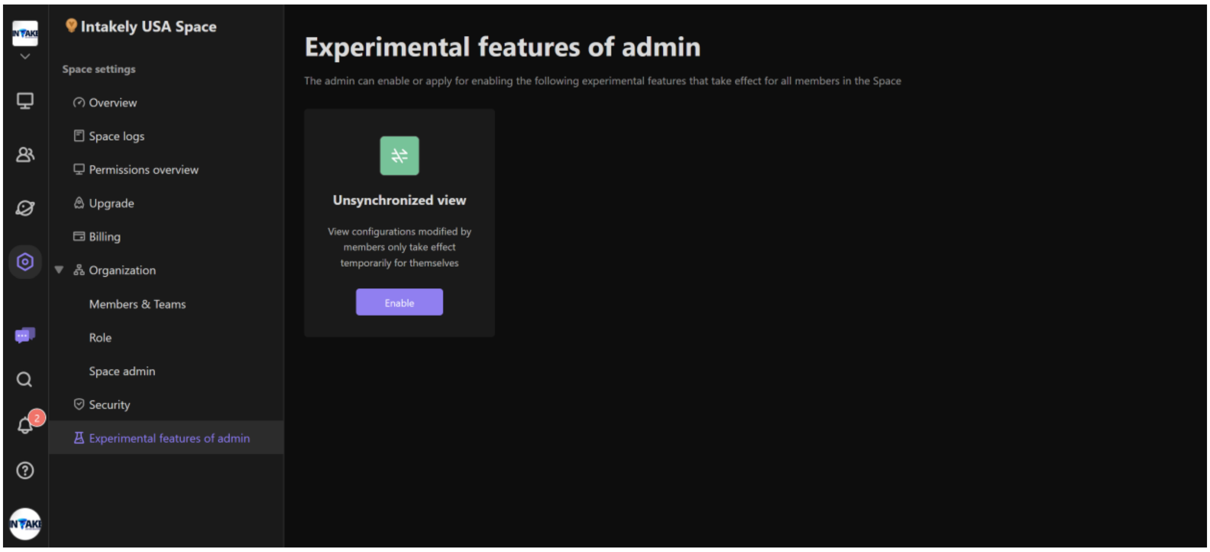

Intakely USA Space
Space settings
Overview
Space logs
Permissions overview
Upgrade
Billing
Organization
Members & Teams
Role
Space admin
Security
Experimental features of admin
Current Plan
Free
Plan
$0.00/month
Next billing date
No subscription
Upgrade page
Payment
Space credit
$42.10
Billing info
Name
subscriptions
Email
subscriptions@intakely.ai
Invoices
Billing Date
Amount
Status
Operation
November 6, 2024
($42.10)
paid
View


Intakely USA Space
Space settings
Overview
Space logs
Permissions overview
Upgrade
Billing
Organization
Members & Teams
Role
Space admin
Security
Experimental features of admin
Members & Teams
Invite
Intakely USA Space
Administrator-...
BDM-Team-01
Implement-Te...
Support-Team...
Intakely USA Space (3 member(s))
Assign to team
Name
Team
Email
Operations
Intakely AI
Admin
Intakely USA Space
subscriptions@intakely.ai
Edit
immohassan06
Admin
Administrator-Team
immohassan06@gmail.com
Edit
yasha.afghan
Admin
Administrator-Team
yasha.afghan@gmail.com
Edit

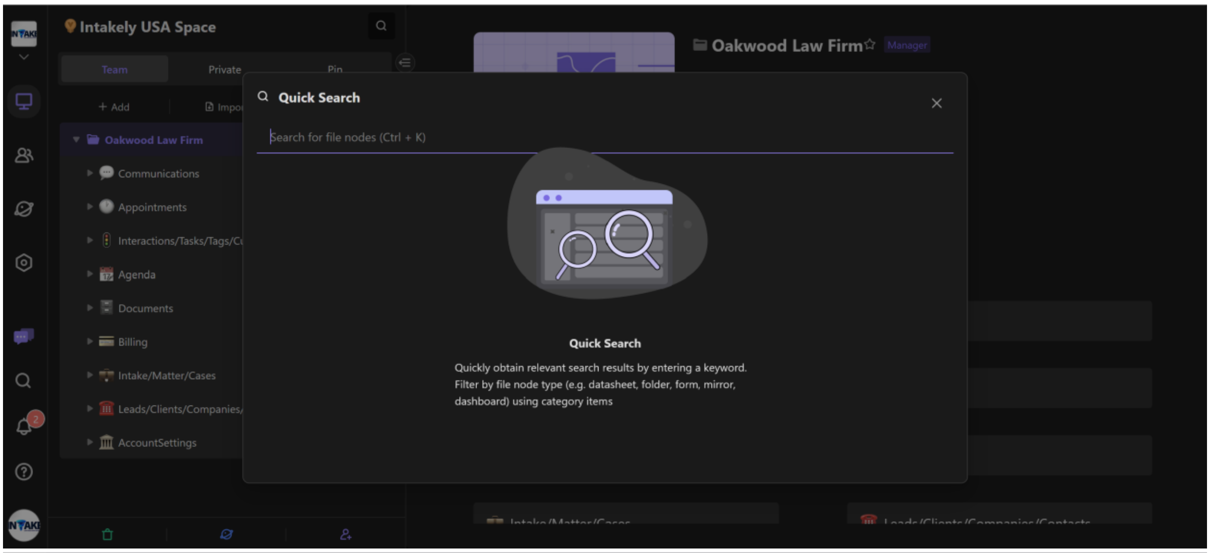

Intakely USA Space
Space settings
Overview
Space logs
Permissions overview
Upgrade
Billing
Organization
Members & Teams
Role
Space admin
Security
Experimental features of admin
Role
You can freely create roles and add any teams / members to one or more roles. Learn more
Search
New role
Finance
Marketing
IT
HR
Legal
Admin
Admin (2 item(s))
Add member / team
Remove
Member / Team
Team
Operations
immohassan06
Administrator-Team
Remove
yasha.afghan
Administrator-Team
Remove
1-2 of 2 items
1
10/page


Intakely USA Space
Space settings
Overview
Space logs
Permissions overview
Upgrade
Billing
Organization
Members & Teams
Role
Space admin
Security
Experimental features of admin
Space admin
You can change the admin or add sub-admins
Admin
Admin have full access to the Space, such as assigning sub-admins and transferring ownership of the Space
Intakely AI
subscriptions@intakely.ai
Change
Sub-admin
With your Space's subscription plan, you can assign 1 sub-admins
Add sub-admin
Name
Access level
Operations
immohassan06
Administrator-Team
Manage members & Manage roles & Manage security se...
Edit
Delete
yasha.afghan
Administrator-Team
Manage members & Manage roles & Manage security se...
Edit
Delete

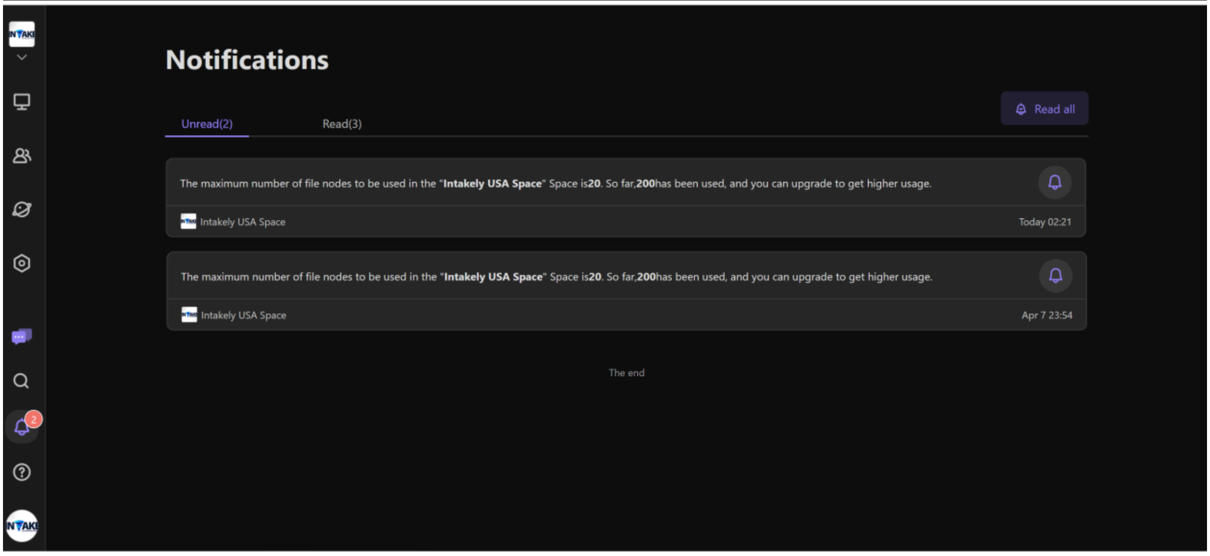

Intakely USA Space
Space settings
Overview
Space logs
Permissions overview
Upgrade
Billing
Organization
Members & Teams
Role
Space admin
Security
Experimental features of admin
Prevent members from inviting user Enterprise
No one can invite users to join the Space except Space admin,and the generated invitation link will be invalid
Prevent users from applying to join the Space in the sharing page Enterprise
The "Apply to join this Space" entry is no longer displayed on the sharing page, and users cannot request for joining
Prevent members from creating public links Enterprise
All members cannot creat the public link of the file node, and the generated public link becomes invalid
Prevent members from creating new file nodes at the root of the catalog Enterprise
Members can't create new file nodes at the root of the catalog. After toggling this on, only space admins can create new file nodes at the root of the catalog.
Specify members to export datasheet and views Pro
Specify members to export data.If the function is disabled,only space andmin can export data.
above "Read-only"
above "Update-only"
above "Editor"
above "Manager"
Prevent "Read-only" users from downloading attachments Enterprise
Users with "Read-only" permission cannot download attachments in cells
Prevent "Read-only" users from copying data Enterprise
Users with "Read-only" permission cannot copy data in cells
Show watermarks Enterprise



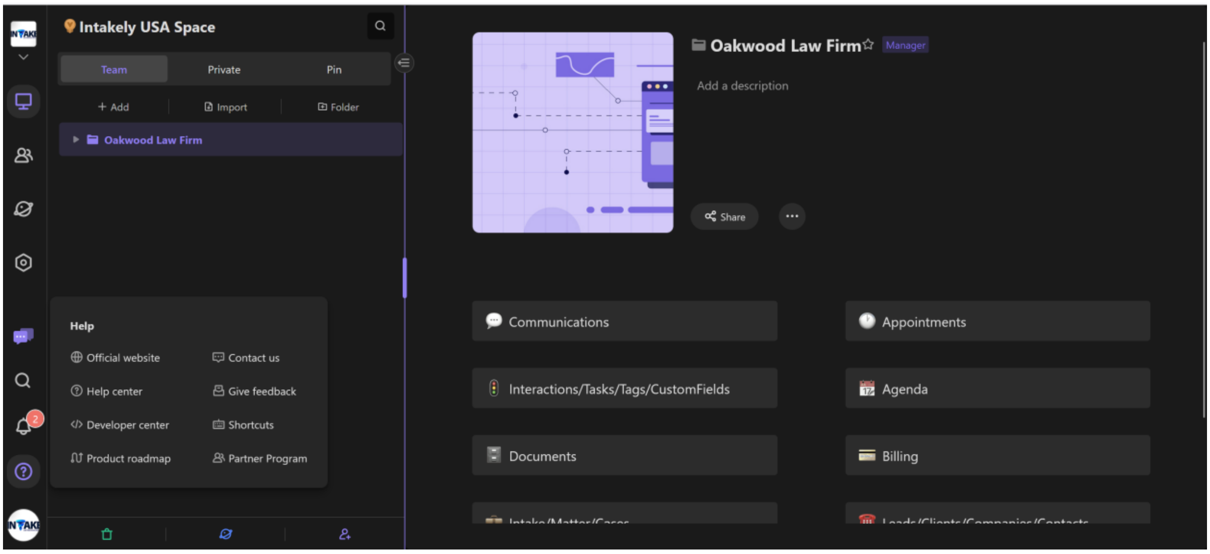
Intakely USA Space
Space settings
Overview
Space logs
Permissions overview
Upgrade
Billing
Organization
Members & Teams
Role
Space admin
Security
Experimental features of admin
Experimental features of admin
The admin can enable or apply for enabling the following experimental features that take effect for all members in the Space
Unsynchronized view
View configurations modified by members only take effect temporarily for themselves
Enable

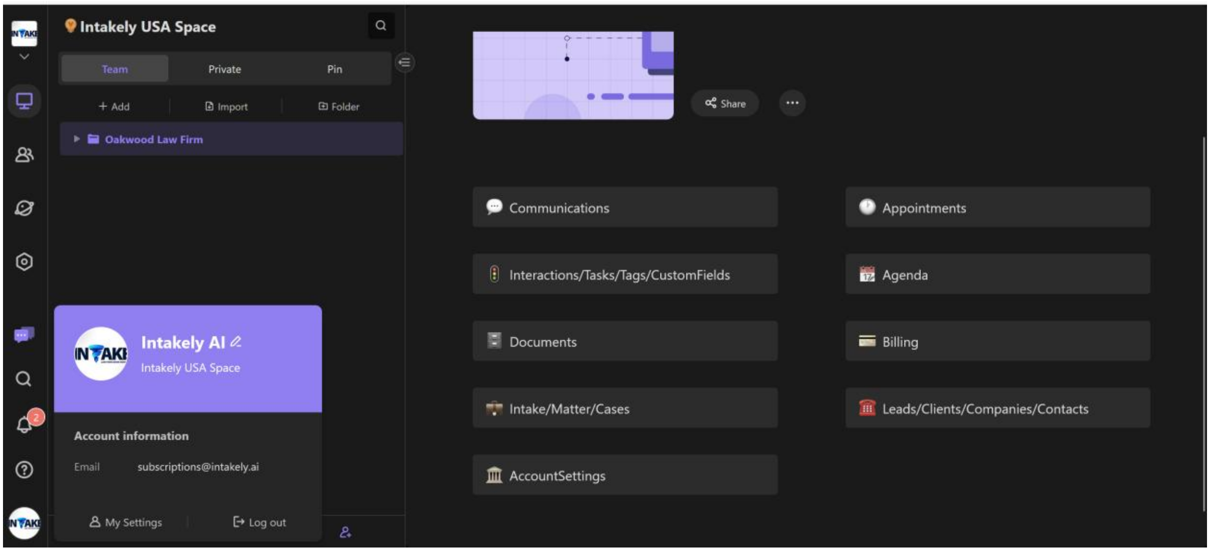


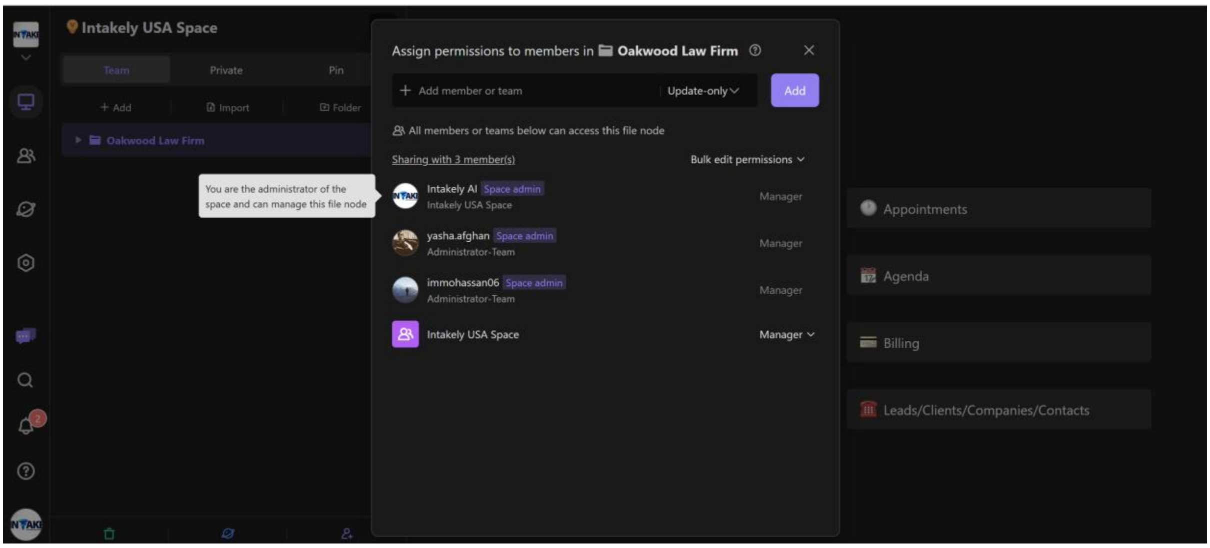
Intakely USA Space
Team
Private
Pin
+ Add
Oakwood Law Firm
Communications
Appointments
Agenda
Documents
Billing
Intake/Matter/Cases
AccountSettings
Oakwood Law Firm
Manager
Quick Search
Search for file nodes (Ctrl + K)
Quick Search
Quickly obtain relevant search results by entering a keyword. Filter by file node type (e.g. datasheet, folder, form, mirror, dashboard) using category items

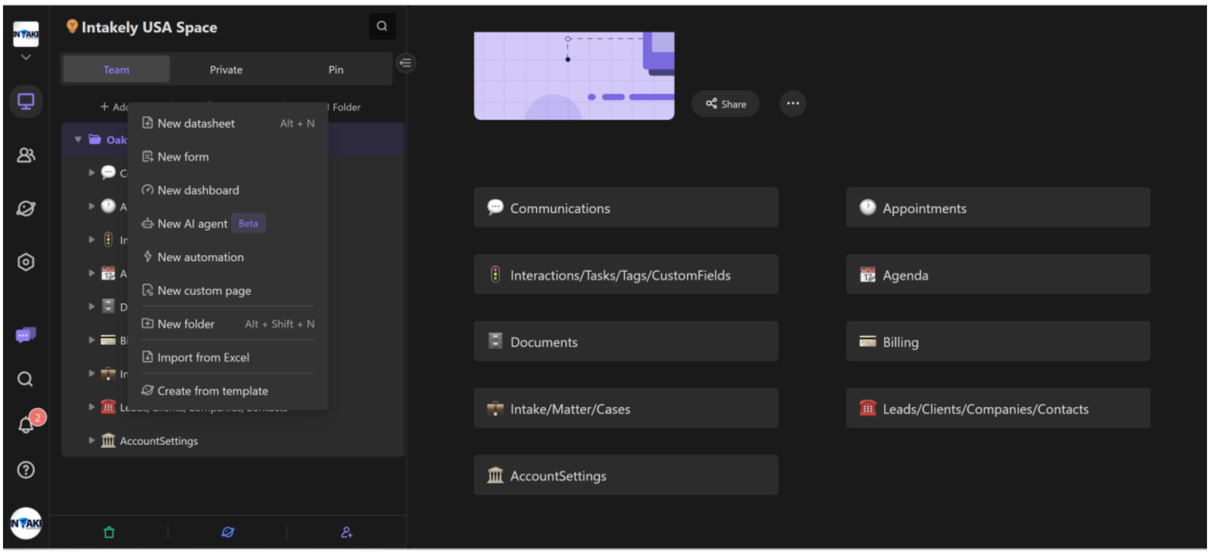


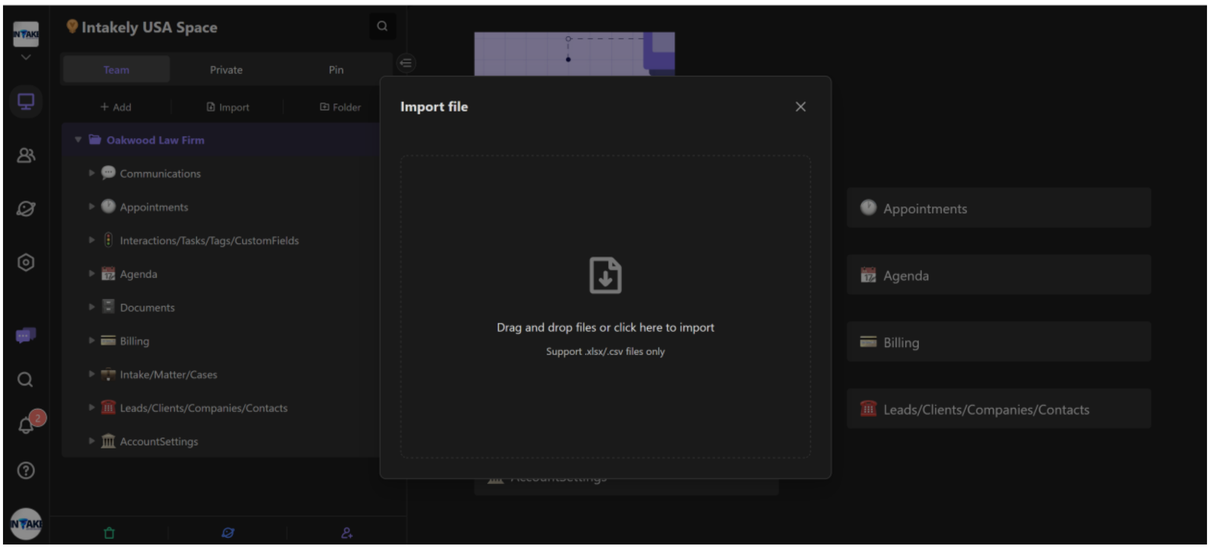
Notifications
Unread(2)
Read(3)
Read all
The maximum number of file nodes to be used in the "Intakely USA Space" Space is20. So far,200has been used, and you can upgrade to get higher usage.
Intakely USA Space
Today 02:21
The maximum number of file nodes to be used in the "Intakely USA Space" Space is20. So far,200has been used, and you can upgrade to get higher usage.
Intakely USA Space
Apr 7 23:54
The end

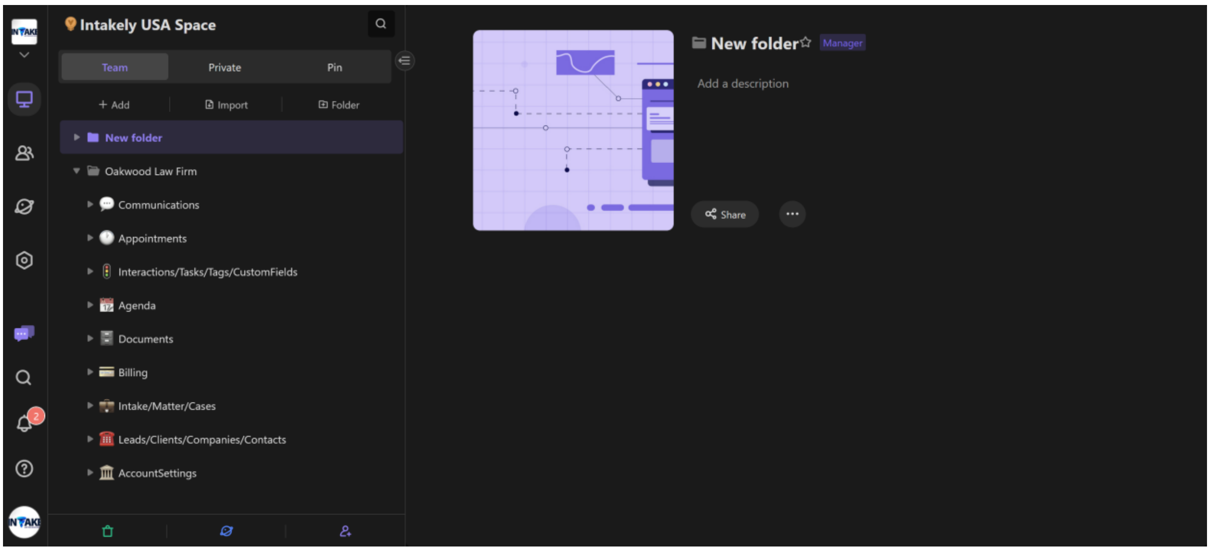

Intakely USA Space
Team
Private
Pin
+ Add
Import
Folder
Oakwood Law Firm
Help
Official website
Contact us
Help center
Give feedback
Developer center
Shortcuts
Product roadmap
Partner Program
Oakwood Law Firm
Manager
Add a description
Share
Communications
Appointments
Interactions/Tasks/Tags/CustomFields
Agenda
Documents
Billing

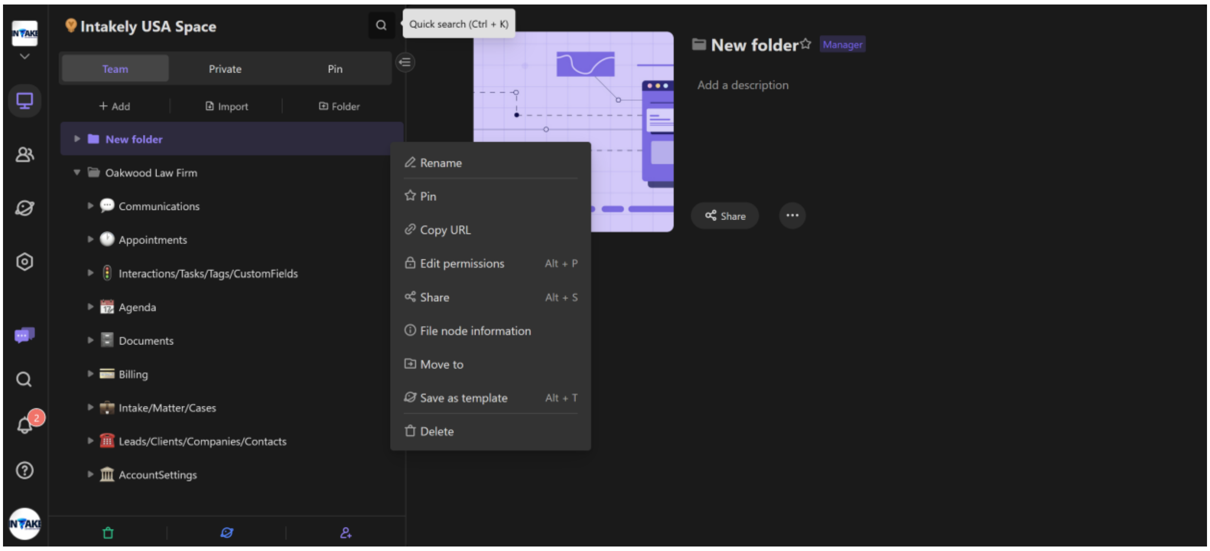

Intakely USA Space
Team
Private
Pin
+ Add
Import
Folder
Oakwood Law Firm
Share
Communications
Appointments
Interactions/Tasks/Tags/CustomFields
Agenda
Documents
Billing
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
Intakely AI
Intakely USA Space
Account information
Email
subscriptions@intakely.ai
My Settings
Log out

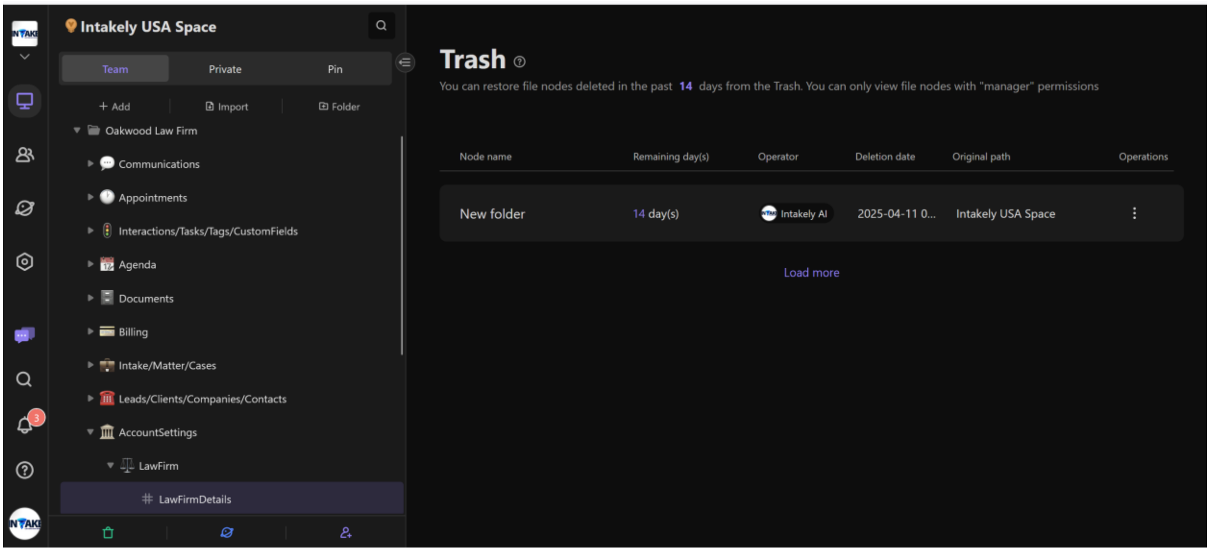

Intakely USA Space
Team
Private
Pin
+ Add
Import
Folder
Oakwood Law Firm
Assign permissions to members in Oakwood Law Firm
Add member or team
Update-only
Add
All members or teams below can access this file node
Sharing with 3 member(s)
Bulk edit permissions
You are the administrator of the space and can manage this file node
Intakely AI
Space admin
Intakely USA Space
Manager
yasha.afghan
Space admin
Administrator-Team
Manager
immohassan06
Space admin
Administrator-Team
Manager
Intakely USA Space
Manager
Appointments
Agenda
Billing
Leads/Clients/Companies/Contacts

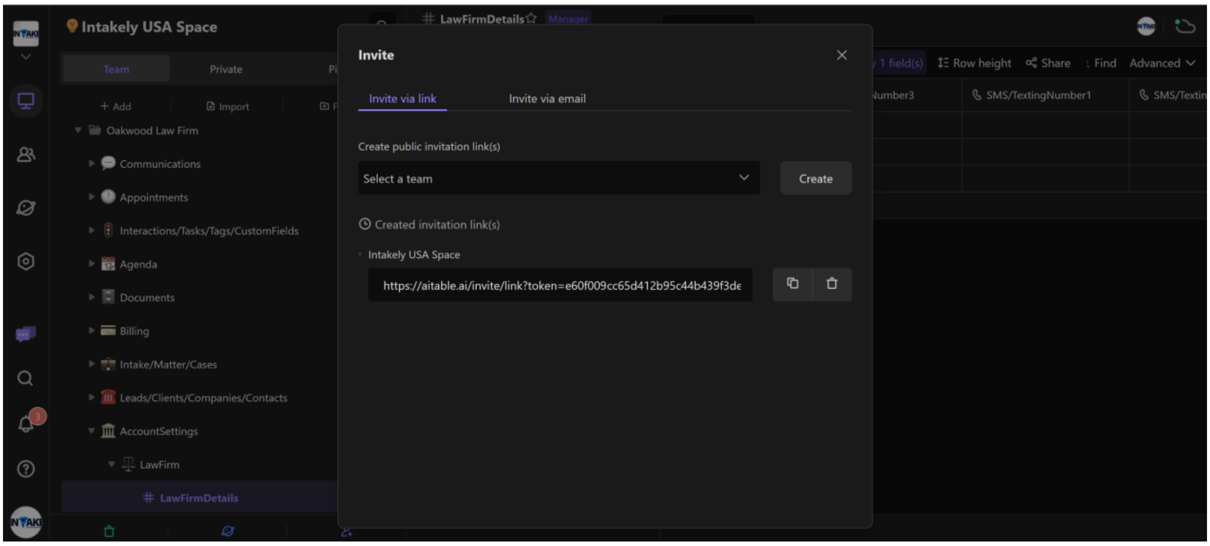

Intakely USA Space
Team
Private
Pin
New datasheet Alt + N
New form
New dashboard
New AI agent Beta
New automation
New custom page
New folder Alt + Shift + N
Import from Excel
Create from template
AccountSettings
Share
Communications
Appointments
Interactions/Tasks/Tags/CustomFields
Agenda
Documents
Billing
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings


Intakely USA Space
Team
Private
Pin
Add
Import
Folder
Oakwood Law Firm
Communications
Appointments
Interactions/Tasks/Tags/CustomFields
Agenda
Documents
Billing
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
Import file
Drag and drop files or click here to import
Support .xlsx/.csv files only
Appointments
Agenda
Billing
Leads/Clients/Companies/Contacts

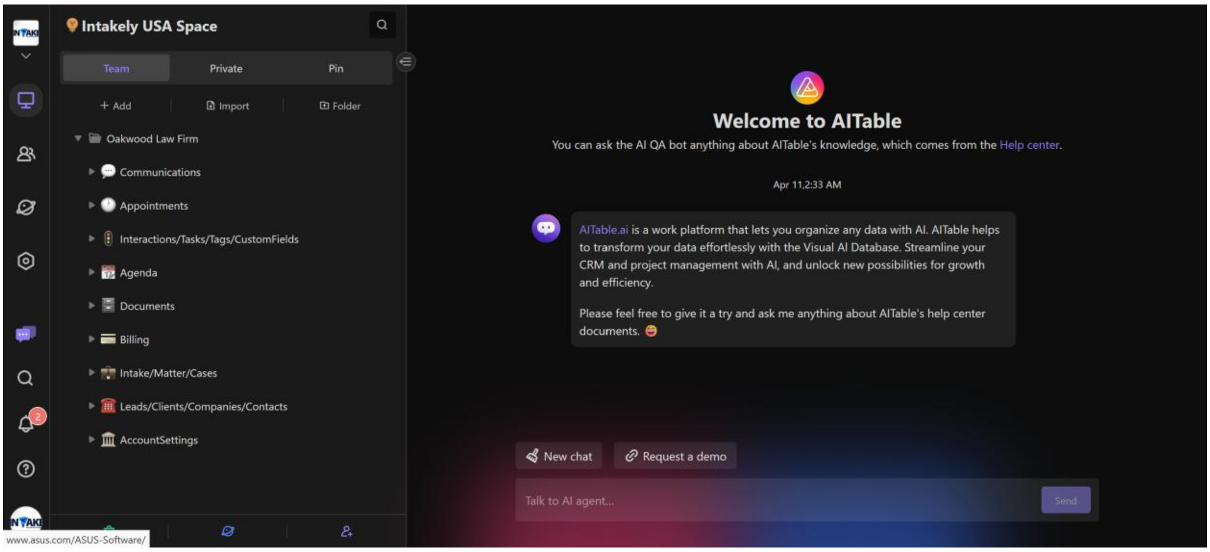

Intakely USA Space
Team
Private
Pin
Add
Import
Folder
New folder
Oakwood Law Firm
Communications
Appointments
Interactions/Tasks/Tags/CustomFields
Agenda
Documents
Billing
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
New folder
Manager
Add a description
Share

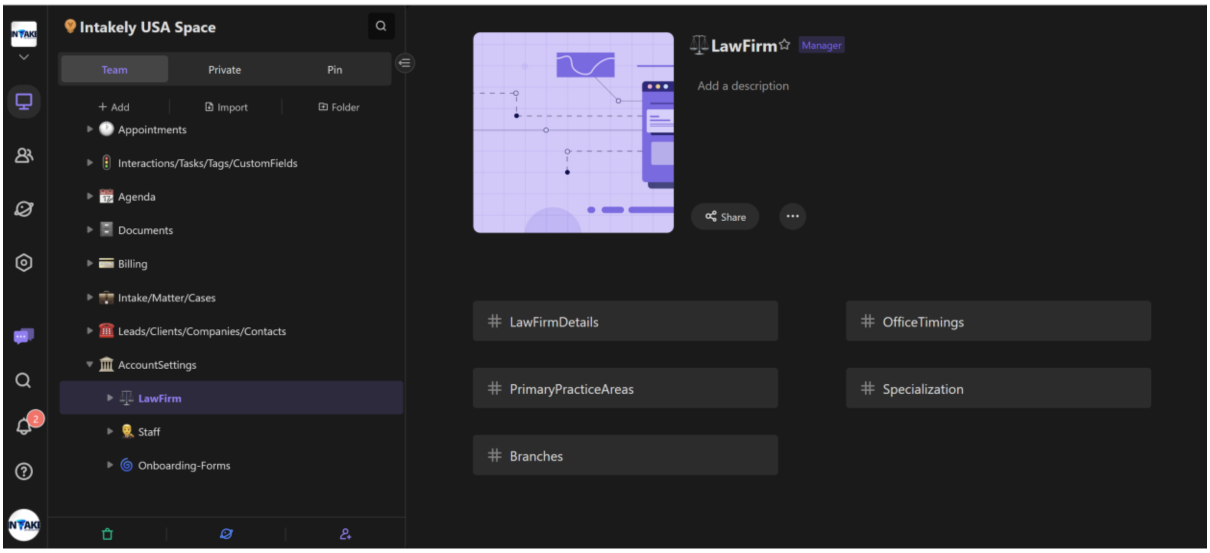

Intakely USA Space
Quick search (Ctrl + K)
Team
Private
Pin
+ Add
Import
Folder
New folder
Oakwood Law Firm
Communications
Appointments
Interactions/Tasks/Tags/CustomFields
Agenda
Documents
Billing
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
Rename
Pin
Copy URL
Edit permissions Alt + P
Share Alt + S
File node information
Move to
Save as template Alt + T
Delete
New folder
Manager
Add a description
Share

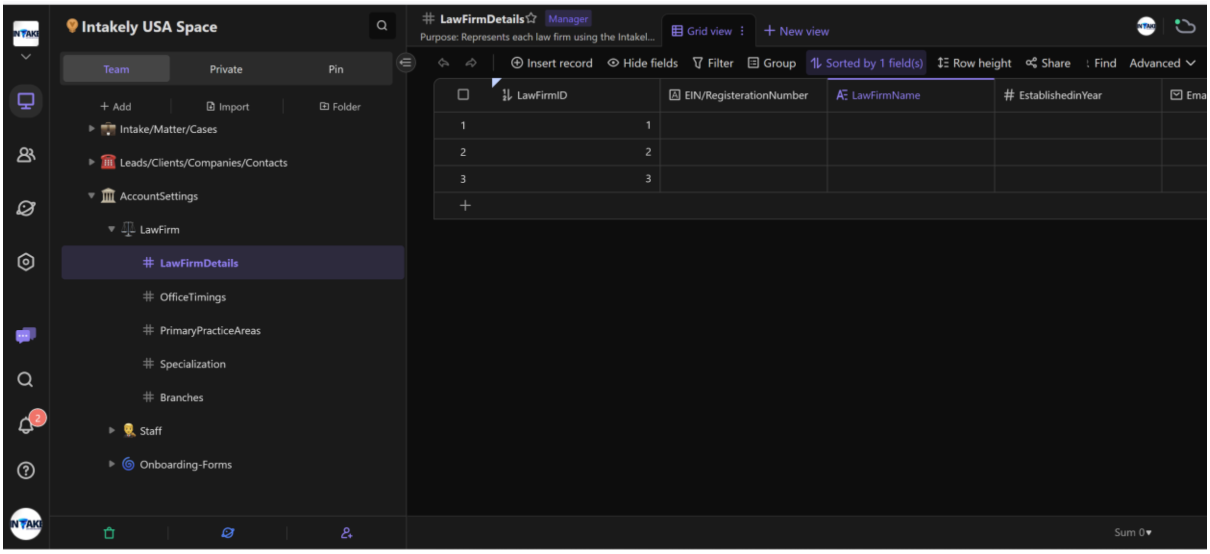

Intakely USA Space
Team
Private
Pin
+ Add
Import
Folder
Oakwood Law Firm
Communications
Appointments
Interactions/Tasks/Tags/CustomFields
Agenda
Documents
Billing
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
LawFirm
LawFirmDetails
Trash
You can restore file nodes deleted in the past 14 days from the Trash. You can only view file nodes with "manager" permissions
Node name
Remaining day(s)
Operator
Deletion date
Original path
Operations
New folder
14 day(s)
Intakely AI
2025-04-11 0...
Intakely USA Space
Load more

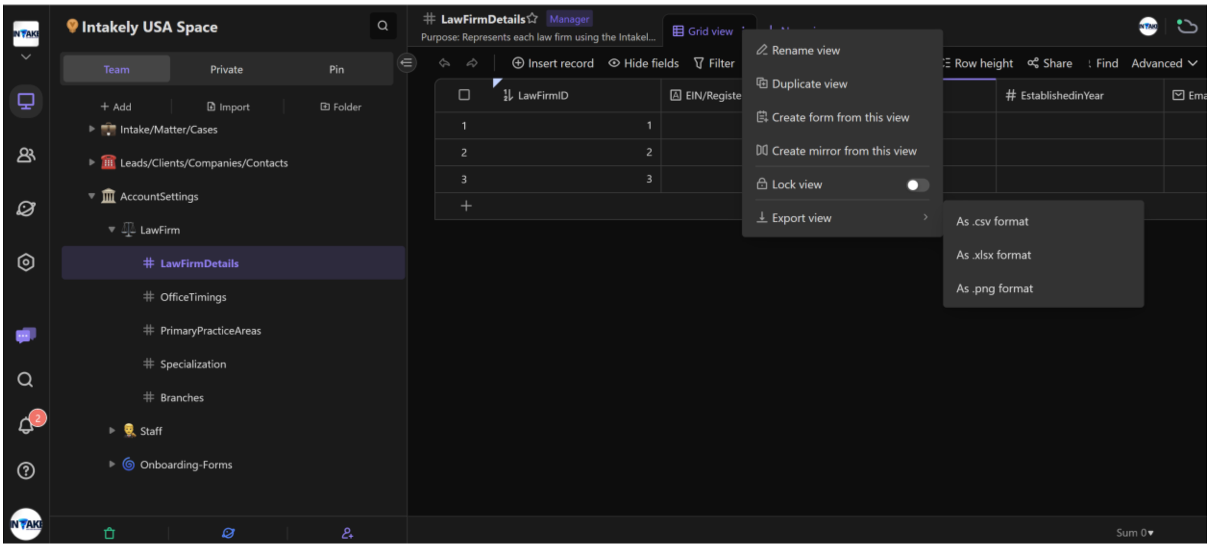

Intakely USA Space
LawFirmDetails
Manager
Invite
Invite via link
Invite via email
Create public invitation link(s)
Select a team
Create
Created invitation link(s)
Intakely USA Space
https://aitable.ai/invite/link?token=e60f009cc65d412b95c44b439f3de
Row height
Share
Find
Advanced
SMS/TextingNumber1
Oakwood Law Firm
Communications
Appointments
Interactions/Tasks/Tags/CustomFields
Agenda
Documents
Billing
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
LawFirm
LawFirmDetails

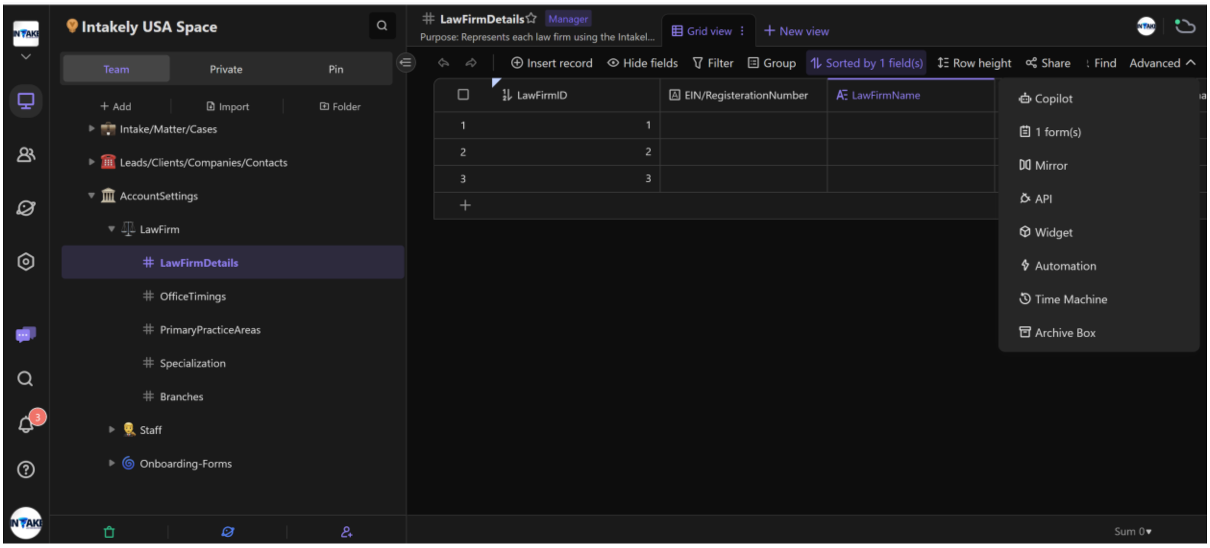
MAIN WORKING AND INPUT AND TABLE WINDOW UI SAMPELS

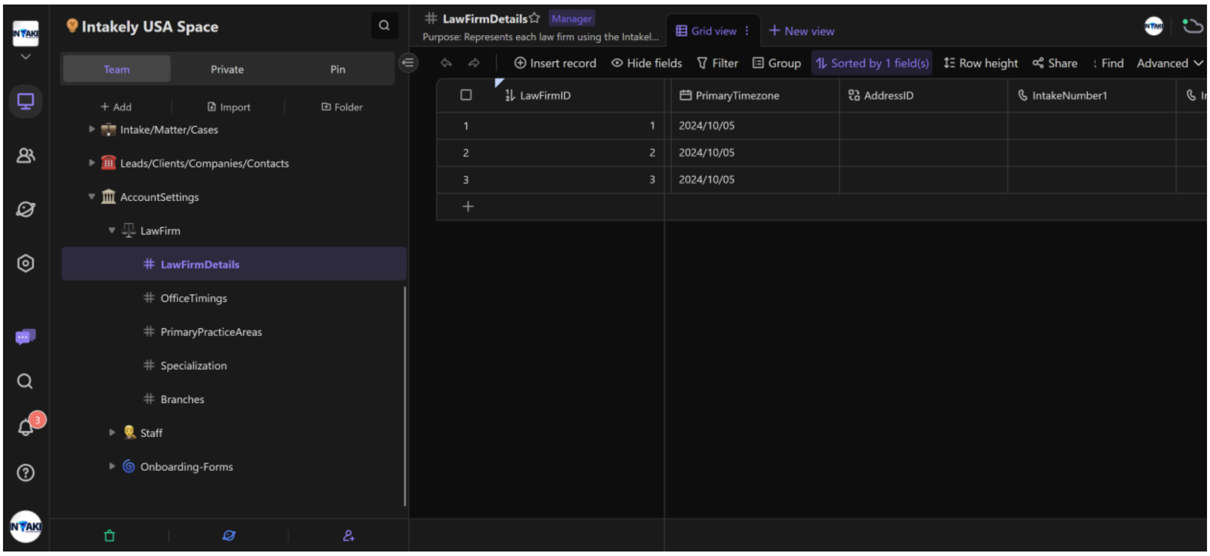


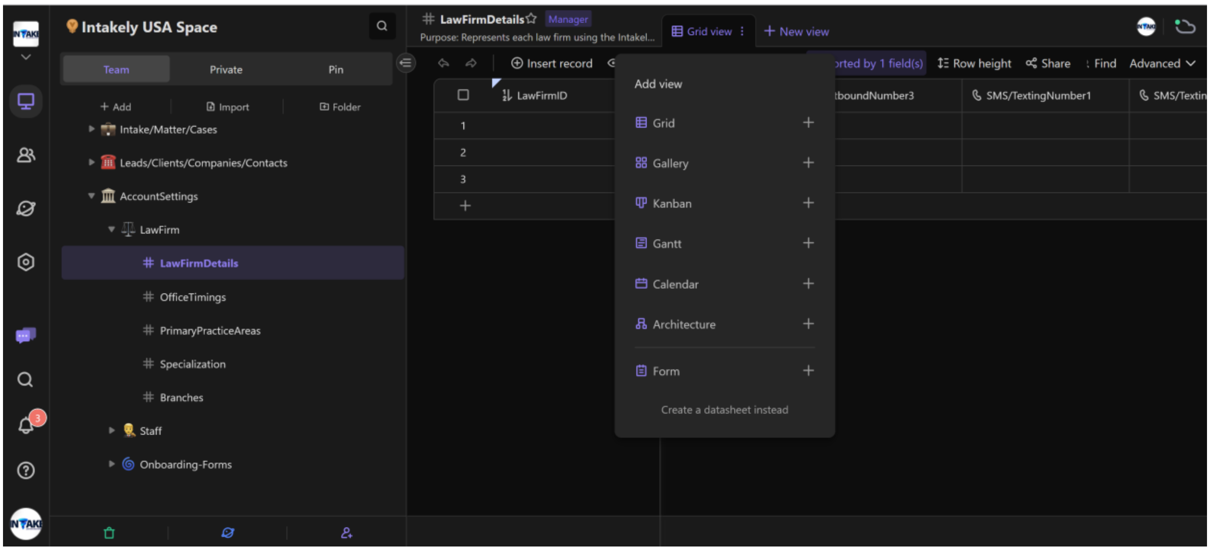




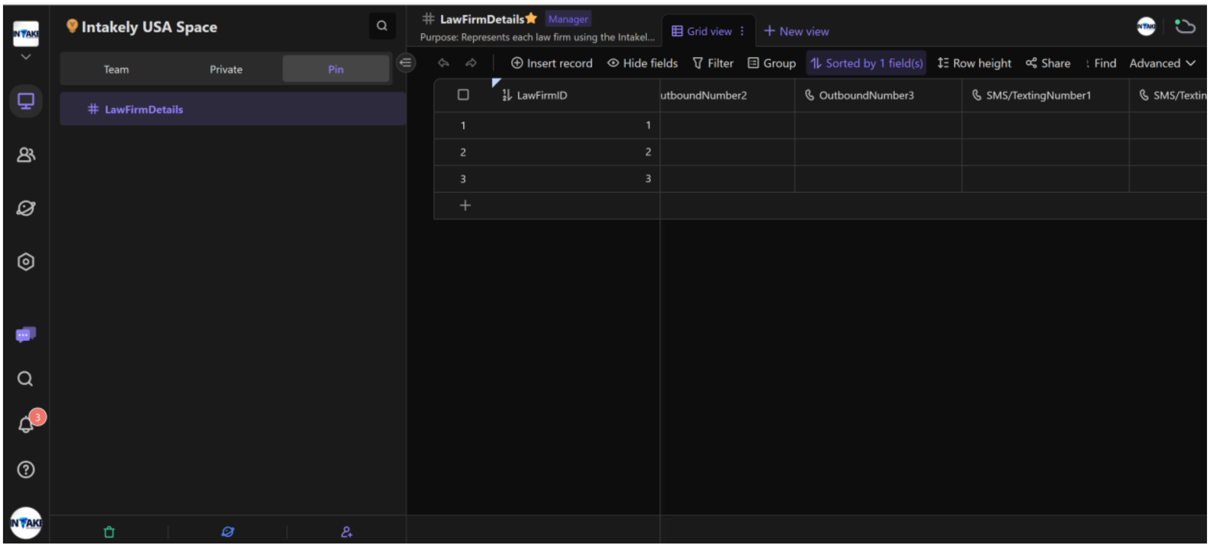

Intakely USA Space
Team
Private
Pin
Add
Import
Folder
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
LawFirm
LawFirmDetails
OfficeTimings
PrimaryPracticeAreas
Specialization
Branches
Staff
Onboarding-Forms
LawFirmDetails
Manager
Purpose: Represents each law firm using the Intakel...
Grid view
Insert record
Hide fields
Filter
Row height
Share
Find
Advanced
LawFirmID
EIN/Registe
EstablishedinYear
Rename view
Duplicate view
Create form from this view
Create mirror from this view
Lock view
Export view
As .csv format
As .xlsx format
As .png format
Sum 0


Intakely USA Space
Team
Private
Pin
Add
Import
Folder
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
LawFirm
LawFirmDetails
OfficeTimings
PrimaryPracticeAreas
Specialization
Branches
Staff
Onboarding-Forms
LawFirmDetails
Manager
Purpose: Represents each law firm using the Intakel...
Grid view
New view
Insert record
Hide fields
Filter
Group
Sorted by 1 field(s)
Row height
Share
Find
Advanced
LawFirmID
EIN/RegistrationNumber
LawFirmName
Copilot
1 form(s)
Mirror
API
Widget
Automation
Time Machine
Archive Box
Sum 0


Intakely USA Space
Team
Private
Pin
Add
Import
Folder
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
LawFirm
LawFirmDetails
OfficeTimings
PrimaryPracticeAreas
Specialization
Branches
Staff
Onboarding-Forms
LawFirmDetails
Manager
Purpose: Represents each law firm using the Intakel...
Grid view
New view
Insert record
Hide fields
Filter
Group
Sorted by 1 field(s)
Row height
Share
Find
Advanced
LawFirmID
PrimaryTimezone
AddressID
IntakeNumber1
2024/10/05
2024/10/05
2024/10/05



Intakely USA Space
Team
Private
Pin
Add
Import
Folder
Intake/Matter/Cases
Leads/Clients/Companies/Contacts
AccountSettings
LawFirm
LawFirmDetails
OfficeTimings
PrimaryPracticeAreas
Specialization
Branches
Staff
Onboarding-Forms
LawFirmDetails
Manager
Purpose: Represents each law firm using the Intakel...
Grid view
New view
Insert record
Row height
Share
Find
Advanced
LawFirmID
SMS/TextingNumber1
Add view
Grid
Gallery
Kanban
Gantt
Calendar
Architecture
Form
Create a datasheet instead



Intakely USA Space
Team
Private
Pin
LawFirmDetails
LawFirmDetails
Manager
Purpose: Represents each law firm using the Intakel...
Grid view
New view
Insert record
Hide fields
Filter
Group
Sorted by 1 field(s)
Row height
Share
Find
Advanced
LawFirmID
OutboundNumber3
SMS/TextingNumber1