Avenir AI

Client Dashboard Guide

Master your real-time AI-powered lead intelligence system

Version 2.0 • November 2024

🚀 Getting Started

Your journey to smarter lead management begins here

🔐 Logging In

1. Navigate to: `https://www.aveniraisolutions.ca/{locale}/client/login`
2. Enter your registered email address
3. Enter your secure password
4. Click **"Login"** / **"Connexion"**

> ### 💡 Quick Tip: Language Toggle
>
> Switch between English and French instantly using the language selector in the top-right corner of your dashboard. Your preference is saved automatically.

First-Time Setup

After your first login, you'll be guided through a quick 3-step setup:

- **Step 1:** Verify your business information
- **Step 2:** Configure your lead preferences
- **Step 3:** Get your API key for website integration

📊 Dashboard Overview

Navigate your command center with confidence

Your Dashboard

Navigation Menu

📊 Analytics
🧠 AI Training
⚙️ Settings
🔑 API Access

1. Lead Table (Center View)

- Real-time display of all your leads
- AI analysis completed within 5-15 seconds
- Filter options: All / Active / Converted / Archived
- Sort by: Date, Urgency, Confidence, Status

2. Key Metrics Dashboard

- **Total Leads:** Cumulative count of all submissions
- **High Priority:** Leads requiring immediate attention
- **Avg Confidence:** AI's certainty level (0-100%)

- **Conversion Rate:** Percentage of leads converted to clients

📧 Lead Management

Every lead, analyzed and actionable

Understanding Your Leads

Lead Information Table

Field	Description
Name	Lead's full name as submitted
Email	Primary contact email address
Language	EN (English) or FR (French) - auto-detected
Message	Original message submitted by the lead
AI Summary	Concise overview of the lead's intent and needs
Intent	Categorized reason for contact (Service Request, Partnership, etc.)
Tone	Communication style (Professional, Casual, Urgent, Direct, etc.)

Field	Description
Urgency	Priority level: High / Medium / Low
Confidence	AI's certainty in its analysis (0-100%)
Timestamp	Date and time of lead submission

Available Actions

Quick Actions for Every Lead

- 📞 **Mark as Contacted** - Track your follow-up progress
- 📅 **Meeting Booked** - Log scheduled appointments
- 💰 **Client Closed** - Mark successful conversions
- ❌ **No Sale** - Document leads that didn't convert
- 🏷️ **Tag Lead** - Add custom categorization tags
- 📦 **Archive Lead** - Remove from active view (recoverable)
- 🗑️ **Delete Lead** - Permanently remove (irreversible)

📈 Analytics & Insights

Data-driven decisions at your fingertips

Analytics Dashboard

Access: Click 📊 Analytics in the top navigation menu

Available Metrics

1. Total Leads

Complete count of all leads received since account activation. This metric tracks your overall lead generation performance.

2. Average Confidence

The AI's average certainty score across all analyzed leads. Higher scores indicate more definitive analysis patterns.

3. Intent Distribution

Visual breakdown of lead types:

- **Service Request:** Leads seeking your primary offerings
- **B2B Partnership:** Business collaboration opportunities
- **Consultation:** Advisory or consultation requests
- **Support Inquiry:** Technical or customer support needs

- **Information Request:** General information seekers

4. Urgency Breakdown

> - 🔴 **High:** Requires immediate action (within 24 hours)
> - 🟡 **Medium:** Follow up within 24-48 hours
> - 🟢 **Low:** General inquiries (48+ hours acceptable)

5. Tone Analysis

Understanding communication styles helps prioritize and personalize your responses:

- **Professional:** Formal business communication
- **Casual:** Friendly, informal approach
- **Urgent:** Time-sensitive language patterns
- **Curious:** Exploratory, information-gathering tone
- **Direct:** Straight-to-the-point communication

6. Language Distribution

Percentage breakdown of English vs French leads, helping you understand your market demographics.

contact@aveniraisolutions.ca