Documentation

(White Market Consultant Co-pilot)

https://john-brophy.app.n8n.cloud/webhook/354e2789-8356-4166-98e0-75140c4d2c47/chat

# AI Agent Use Cases and Background Logic

## Creating New Review

* User’s input message
* User must notify client id (three digits) in the message.
* User must give the agent link-urls for KPI data sheets in message.
* Example:

Please create new weekly review for client 009. Here are some link-urls for KPI data.

<https://docs.google.com/spreadsheets/d/1C5DSQdxLy5sQQS6RXw6lutwgcESubIpsRbDFhRcuD3E/edit?gid=189042998#gid=189042998>

https://docs.google.com/spreadsheets/d/1C5DSQdxLy5sQQS6RXw6lutwgcESubIpsRbDFhRcuD3E/edit?gid=0#gid=0

* Background logic of AI Agent
* First, extract client id and link-urls from the user message.
* Get client information from knowledge base.
* Get project, weekly reviews, monthly reviews, tasks information related to the client.
* Get review guidelines from Slite.
* Then get KPI data from provided urls.
* Generate new review and insert it into Slite.

## Creating New Task

* User’s input message
* User must notify client id (three digits) and user’s requirements for the new task in the message.
* User must give the agent link-urls for KPI data sheets in message.
* Example:

Please create new task named “New Task” for client 179.

<https://docs.google.com/spreadsheets/d/1C5DSQdxLy5sQQS6RXw6lutwgcESubIpsRbDFhRcuD3E/edit?gid=189042998#gid=189042998>

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* Background logic of AI Agent
* First, extract client id and link-urls from the user message.
* Get client information from knowledge base.
* Get project, weekly reviews, monthly reviews, tasks information related to the client.
* Extract user’s requirements from the user message.
* Then get KPI data from provided urls.
* Generate new task.

## General Question

* User’s input message
* User can ask anything to the agent
* Example:

How many tasks belong to client 162?

How many of them are active now?

What is the project name of client 009?

* Background logic of AI Agent
* The agent determine what information is necessary for answering the user message.
* Then agent decides the tool (tool name – MongoDB or Pinecone, tool parameters, etc) and and use it. This tool usage can be repeated multiple times as needed.
* If enough information is prepared, the agent give the final answer to the user.
* Before each usage of tool, the agent detects the client id of the required data and analyze the client-mapping sheet. Then if the client is blocked, i.e., if the information about client is blocked, stop the tool usage.

# Updating Knowledge Base Strategy

## Using Asana-provided webhooks, update asana data at real-time.

## Scan whole Slite and update changed notes everyday.

# Installing N8N Agent

1. Go to <https://n8n.io/> and sign in.
2. Create new workflow and explore in it.
3. Press “…” button next to the GitHub avatar in the top right corner of the workflow editing canvas.
4. Click “Import from File” option and import the workflow json file. Then, the workflow will be loaded.
5. Save the workflow and active it.
6. Open “Pinecone Search Tool” node and set the “Workflow” parameter as “From list” and “your workflow name”.
7. Set credentials for all Mongo tools & nodes, Pinecone node, Google Sheet tools & nodes and OpenAI tools & nodes.
8. Usage: Open “When chat message received” node and click the url of “Chat URL”. When you go to the url, you will see chatting UI.

# LLM model Option

1. GPT-4.1: General Recommend, current used
2. O4-mini: More accurate performance, but low latency
3. GPT-4.1 mini: Fast, but less accurate performance