# **Embark+ CRM AI Assistant - User Guide**

## **What This Assistant Can Do**

Your AI assistant helps you manage your Embark+ CRM through natural conversation. It can handle contacts, opportunities, conversations, and messaging - all through simple, everyday language.

## **Core Capabilities**

### **1. Contact Management**

**Create New Contacts**

* "Add a new contact named John Smith with email john@example.com"
* "Create a contact for Sarah Johnson, phone number +1-555-0123"
* "Add Jane Doe with email jane@company.com and phone +1-555-0456"

**Search and Find Contacts**

* "Find all my contacts"
* "Show me contacts with the tag 'VIP'"
* "Search for contacts named Johnson"
* "Get me all leads from this month"

**View Contact Details**

* "Show me details for John Smith"
* "Get contact information for the person with phone +1-555-0123"
* "What do we know about Sarah@company.com?"

### **2. Contact Tagging**

**Add Tags**

* "Tag John Smith as 'hot lead'"
* "Add the tag 'follow-up needed' to Sarah Johnson"
* "Tag the contact with phone +1-555-0123 as 'VIP client'"

**Remove Tags**

* "Remove the 'cold lead' tag from John Smith"
* "Untag Sarah Johnson as 'follow-up needed'"

### **3. Messaging (SMS & Email)**

**Send SMS Messages**

* "Send an SMS to John Smith saying 'Thanks for your interest, we'll be in touch soon'"
* "Text the contact with phone +1-555-0123: 'Your appointment is confirmed for tomorrow'"

**Send Email Messages**

* "Send an email to Sarah Johnson with subject 'Follow-up on our meeting' and message 'Hi Sarah, thanks for taking the time to meet with us yesterday'"
* "Email john@example.com about the product demo"

### **4. Opportunity Management**

**View Opportunities**

* "Show me all open opportunities"
* "Get opportunities from the sales pipeline"
* "What opportunities do we have this month?"

**Update Opportunities**

* "Move John Smith's opportunity to the 'qualified' stage"
* "Update the opportunity value to $5000"
* "Change the opportunity status to 'won'"

### **5. Conversation Management**

**Search Conversations**

* "Show me recent conversations"
* "Get conversation history for John Smith"
* "Find conversations from this week"

**View Messages**

* "Show me messages from my conversation with Sarah Johnson"
* "Get the latest messages from the lead pipeline"

### **6. Tasks and Organization**

**View Tasks**

* "Get all tasks for John Smith"
* "Show me tasks related to this contact"

**Custom Fields**

* "Show me available custom fields"
* "What custom fields can I use for contacts?"

## **How to Interact with Your Assistant**

### **Natural Language**

You don't need special commands or technical language. Just talk naturally:

**Instead of:** "Execute contact\_search query=John" **Say:** "Find John in my contacts"

**Instead of:** "Add tag\_name='VIP' to contact\_id=123" **Say:** "Tag John as VIP"

### **The Assistant Will Ask for Details**

If you don't provide enough information, the assistant will ask:

**You:** "Send a message" **Assistant:** "I'd be happy to help you send a message. Who would you like to send it to, and what type of message - SMS or email?"

### **Confirmation Before Actions**

The assistant will confirm important actions:

**You:** "Delete all my contacts" **Assistant:** "I can't delete contacts, but I can help you manage them. What specifically would you like to do?"

**You:** "Send an email to all my leads" **Assistant:** "I can send individual emails. Which specific lead would you like to email, and what should the message say?"

## **Example Workflows**

### **New Lead Follow-up**

1. "Find contacts tagged as 'new lead'"
2. "Send an SMS to John Smith: 'Hi John, thanks for your interest. When would be a good time for a quick call?'"
3. "Tag John Smith as 'contacted'"

### **Opportunity Management**

1. "Show me opportunities in the sales pipeline"
2. "Move Sarah Johnson's opportunity to the 'proposal sent' stage"
3. "Update the opportunity value to $3500"

### **Contact Organization**

1. "Find all contacts without tags"
2. "Tag them as 'needs review'"
3. "Get tasks for these contacts to plan follow-up"

## **Tips for Best Results**

### **Be Specific**

* **Good:** "Send an SMS to John Smith about tomorrow's meeting"
* **Better:** "Send an SMS to John Smith saying 'Hi John, just confirming our meeting tomorrow at 2 PM. See you then!'"

### **Use Names or Identifiers**

* "Tag the contact named John Smith" (clear)
* "Tag that guy from yesterday" (unclear)

### **One Action at a Time**

* **Good:** "Create a contact for John Smith with email john@company.com"
* **Avoid:** "Create 5 contacts, send them all emails, and move them to the hot leads pipeline"

### **Ask for What You Need**

* "Show me my highest priority leads"
* "Who should I follow up with today?"
* "What opportunities are close to closing?"

## **What the Assistant Cannot Do**

* Create, edit, or delete calendar appointments
* Access payment processing or financial data
* Delete contacts or opportunities
* Bulk operations on large numbers of contacts
* Integrate with external systems outside Embark+

## **Getting Help**

If you're not sure what's possible, just ask:

* "What can you help me with?"
* "How do I update a contact's information?"
* "Can you show me all my recent leads?"

The assistant will guide you through what's available and how to accomplish your goals within Embark+.

*Remember: This assistant is designed to make your CRM management easier through natural conversation. Don't hesitate to ask questions or request clarification if you need help with any task.*