VANI User Navigation Guide

Project VANI: Virtual Agent Network Interface
Complete Navigation & Workflow Guide
Version 1.0 | Production Ready

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Getting Started

Your First Login

When you access VANI for the first time:

1. **Navigate** to `https://vani.theaicompany.co/command-center`
2. **Sign In** with your email and password (set during account creation)
3. **Select Industry** from the dropdown if you have access to multiple industries
4. **View Dashboard** - Your personalized command center appears

Understanding Your Access Level

Your role determines what you can access in VANI. Roles include:

- **User**: Access assigned industries, manage contacts/companies, send outreach
- **Administrator**: User permissions plus industry management, Knowledge Base, user administration
- **Super Administrator**: Full system access including infrastructure and deployments
- **Business User**: Varies by assignment (typically admin or user rights)

Check Your Role: Navigate to **Settings** → **Account** → **View Profile** to see your assigned role and industries.

Dashboard Overview

Main Dashboard

The **Dashboard** is your central hub for monitoring activity and accessing key features.

Key Metrics Section

Located at the top of the dashboard, displays:

- **Total Contacts**: Count of all contacts in your assigned industries
- **Total Companies**: Count of all companies in your assigned industries
- **Outreach Sent (This Month)**: Number of messages sent this month
- **Response Rate**: Percentage of contacts who responded
- **Meetings Scheduled**: Number of upcoming meetings
- **Engagement Score**: Overall engagement health

Visual Analytics

- **Outreach Trends Chart**: Line chart showing outreach volume over time
- **Channel Distribution**: Pie chart showing Email vs WhatsApp vs LinkedIn distribution
- **Industry Breakdown**: Bar chart showing activity by industry
- **Response Timeline**: Visualization of response patterns

Recent Activity

- **Latest Outreach**: 10 most recent messages sent
- **Upcoming Meetings**: Next 5 scheduled meetings
- **Recent Responses**: Latest engagement from contacts
- **New Companies Added**: Recently created company records

Customizing Your Dashboard

For Users:

- Click **"Customize Dashboard"** (top right)
- Check/uncheck metric cards you want to display
- Drag cards to reorder layout
- Save preferences (auto-saved)

Core Navigation Sections

1. Contacts Tab

The **Contacts** section manages individual contact records.

Accessing Contacts

1. Click **"Contacts"** in main navigation
2. View list of all contacts in assigned industries
3. Use search bar to find specific contacts
4. Apply filters (by company, status, industry, etc.)

Contact List Features

Columns Displayed:

- **Name**: Contact full name
- **Email**: Email address (clickable)
- **Company**: Associated company name
- **Role**: Job title/position
- **Status**: Engagement status (Cold, Contacted, Engaged, Qualified, Won, Lost)
- **Last Contact**: Date of last interaction
- **Channel**: Preferred communication channel

Sorting & Filtering:

- Click column headers to sort (A-Z, Z-A)
- Click **"Filter"** button to filter by:
  - Company
  - Status
  - Industry
  - Last contact date
  - Source (AI Target Finder, Manual, Import)

Creating a New Contact

1. Click **"+ Add Contact"** (top right)
2. **Select Company**: Choose existing company or create new one
3. **Enter Details**:
   - **Full Name**: (required)
   - **Email**: (required, must be valid)
   - **Phone**: (optional)
   - **Role**: Job title (required)
   - **LinkedIn Profile**: Optional LinkedIn URL
   - **Notes**: Additional information
4. Click **"Save Contact"**
5. Contact appears in list immediately

Editing a Contact

1. Click on contact name or **"Edit"** icon
2. Modify desired fields
3. Click **"Save Changes"**
4. Changes saved automatically

Viewing Contact Details

Click on any contact name to open **Contact Profile** showing:

- **Full Profile**: All contact information
- **Interaction History**: All emails, messages, meetings with this contact
- **Status Timeline**: When status changed (Cold → Contacted → Engaged)
- **Associated Files**: Attached documents or pitches
- **Meeting History**: Past and upcoming meetings

Contact Actions

From contact detail view, available actions:

Action	Purpose
Send Email	Compose and send email to contact
Send WhatsApp	Send WhatsApp message
Send LinkedIn	Send LinkedIn message
Generate Pitch	Create AI-powered pitch for contact
Schedule Meeting	Book meeting via Cal.com
Add Note	Add internal note (not sent)
Change Status	Update engagement status
Add to Campaign	Assign to outreach campaign

2. Companies Tab

The **Companies** section manages organization records.

Accessing Companies

1. Click **"Companies"** in main navigation
2. View list of all companies in assigned industries
3. Search by company name, domain, or industry
4. Filter by industry, size, or source

Company List Features

Columns Displayed:

- **Company Name**: Organization name
- **Domain**: Website domain (clickable)
- **Industry**: Industry classification
- **Contact Count**: Number of contacts from this company
- **Status**: Overall company status
- **Added Date**: When company was added to VANI

Creating a New Company

1. Click **"+ Add Company"** (top right)
2. **Enter Company Details**:
    - **Company Name**: (required)
    - **Domain**: Company website domain (required)
    - **Industry**: Select from your assigned industries (required)
    - **Description**: Optional company background
    - **Company Size**: Small / Medium / Large (optional)

    - **Location**: City or country (optional)
3. Click **"Save Company"**
4. Company created and ready to add contacts

Viewing Company Profile

Click on company name to open **Company Profile** showing:

- **Company Information**: All company details
- **Contacts**: List of contacts from this company
- **Interaction Summary**: Total outreach and responses
- **Pitches**: All generated pitches for this company
- **Activities**: Timeline of all interactions
- **Files**: Attached documents and presentations

Company Actions

From company detail view, available actions:

Action	Purpose
Add Contact	Create new contact in this company
View All Contacts	See all contacts from this company
Generate Pitch	AI pitch for company as a whole
Bulk Outreach	Send message to all contacts
Schedule Meeting	Book meeting with company representative
Add Note	Internal note about company
View Website	Open company website in new tab

3. AI Target Finder Tab

AI Target Finder uses artificial intelligence to identify high-value prospects.

Accessing AI Target Finder

1. Click **"AI Target Finder"** in main navigation
2. View AI-powered target recommendations
3. Review suggested targets with confidence scores

Using AI Target Finder

Step 1: Select Search Preset

Choose from predefined search profiles:

- **High Priority**: C-level executives from high-value companies
- **Broad Search**: Wide industry coverage, mixed seniority
- **C-Level Only**: CEOs, CFOs, CMOs, CIOs exclusively

- **Decision Makers**: VP-level and above
- **Custom**: Define your own criteria

Step 2: Configure Search Parameters

- **Industries**: Select from your assigned industries (required)
- **Target Roles**: CEO, CTO, CMO, CFO, VP of Sales, etc.
- **Company Size**: Filter by company size (Small, Medium, Large)
- **Keywords**: Industry-specific search keywords
- **Location**: Geographic region (optional)

Step 3: Generate Recommendations

1. Click **"Find Targets"**
2. AI processes request (usually 30-60 seconds)
3. Results display in recommendations panel

Step 4: Review Recommendations

Each recommendation shows:

- **Contact Name & Role**: Prospect identification
- **Company**: Organization name
- **Confidence Score**: 0-100% AI confidence in fit
- **Relevance Factors**: Why AI recommends this target
- **Knowledge Base Context**: Related case studies and services
- **Quick Actions**: Button to create contact immediately

Step 5: Create Selected Targets

1. Check boxes for targets you want to create
2. Click **"Create Selected Targets"** (bottom right)
3. Targets are created as contacts in VANI
4. Notification confirms creation

Best Practices for AI Target Finder:

- Start with **High Priority** preset for highest confidence
- Use **Custom** settings to refine results based on past successes
- Review **Confidence Scores** (aim for 70%+ for best results)
- Check **Knowledge Base Context** to understand relevance
- Create targets batch by batch (5-10 at a time recommended)

4. Outreach Tab

The **Outreach** section sends messages via multiple channels.

Accessing Outreach

1. Click **"Outreach"** in main navigation
2. Choose communication channel: **Email**, **WhatsApp**, **LinkedIn**
3. Select recipients and compose message

Email Outreach

Sending Single Email:

1. Navigate to **Outreach → Email**
2. Click **"Compose Email"** or select contact and click **"Send Email"**
3. **Configure Email**:
    - **To**: Recipient email address
    - **From**: Your email address (configured by admin)
    - **Subject**: Email subject line
    - **Body**: Message content
4. **Options**:
    - **Use AI**: Click **"Generate with AI"** for AI-powered message
    - **Use Knowledge Base**: Click **"Use KB Content"** to insert relevant information
    - **Add Attachment**: Attach files (PDFs, presentations, etc.)
    - **Schedule**: Choose to send now or schedule for later
5. **Preview**: Review before sending
6. Click **"Send Email"**
7. Confirmation appears and email is sent

Bulk Email Campaign:

1. Navigate to **Outreach → Campaigns**
2. Click **"Create Campaign"**
3. **Configure Campaign**:
    - **Campaign Name**: Descriptive name
    - **Select Recipients**: Check contacts/companies to include
    - **Choose Template**: Select message template or create custom message
    - **Enable AI Personalization**: AI adapts message per recipient
    - **Schedule**: Set send time and frequency
4. **Review**: Preview messages for sample recipients
5. Click **"Start Campaign"**
6. Messages queue for sending

Email Templates:

Access predefined email templates:

1. Navigate to **Outreach → Email → Templates**
2. Browse available templates by category
3. Click **"Use Template"** to insert into message
4. Modify as needed with personalization
5. Send or save as draft

WhatsApp Outreach

Sending WhatsApp Message:

1. Navigate to **Outreach → WhatsApp**
2. Select contact with phone number
3. Click **"Send WhatsApp"** or click **"Compose WhatsApp"**
4. **Compose Message**:
    - **To**: Contact phone number (auto-filled)

    - **Message**: WhatsApp message text
    - **Media**: Optional image or document
5. **Preview**: Review message format
6. Click **"Send WhatsApp"**
7. Message delivered via Twilio

WhatsApp Broadcast:

1. Click **"Send Broadcast"** (in WhatsApp section)
2. Select multiple contacts
3. Create message
4. Click **"Send to All"**
5. Messages sent to all recipients

LinkedIn Outreach

Note: LinkedIn outreach requires LinkedIn API connection configured by your administrator.

Sending LinkedIn Message:

1. Navigate to **Outreach → LinkedIn**
2. Select contact with LinkedIn profile
3. Click **"Send LinkedIn Message"**
4. **Compose Message**:
    - **To**: Contact LinkedIn profile (auto-filled)
    - **Message**: Connection request or message text
    - **Connection**: If not connected, send connection request first
5. Click **"Send Message"**
6. Message delivered via LinkedIn API

Tracking Outreach

All outreach is automatically tracked:

1. **Activities Tab**: See all sent messages
2. **Contact Detail View**: View all messages to specific contact
3. **Outreach Dashboard**: Analytics on sends, opens, clicks, replies
4. **Status Updates**: Real-time delivery status (Sent, Delivered, Read, Replied)

5. Knowledge Base Section (Admin Access)

The **Knowledge Base** stores company information for AI reference.

Note: Knowledge Base access depends on your permissions. Users typically can query KB; administrators can upload and manage.

Querying Knowledge Base (All Users)

1. Navigate to **Knowledge Base → Query**
2. **Enter Search Query**: Natural language question
    - Example: "What are the ROI benefits of reputation management?"
    - Example: "How does VANI help with email outreach?"
3. **Filter Collections** (optional):

    - case_studies - Success stories
    - services - Service offerings
    - company_profiles - Company information
    - industry_insights - Industry trends
    - platforms - Platform documentation
    - faqs - Frequently asked questions
4. **Filter Industry** (optional): Search within specific industry
5. Click **"Search Knowledge Base"**
6. **Results Display**:
    - Relevant documents with matching content
    - Excerpt showing context
    - Relevance score
    - Source document name
7. **Use Content**: Click **"Use in Message"** to insert excerpt into outreach

Uploading Documents (Admin Only)

1. Navigate to **Admin** → **Knowledge Base** → **Upload Documents**
2. **Select Files**: Choose PDF or TXT files
3. **Configure Upload**:
    - **Collection**: Select collection type
    - **Company**: Company name (e.g., "The AI Company")
    - **Platform**: Platform name (e.g., "VANI")
    - **Service**: Service name (e.g., "Reputation Management")
    - **Industry**: Industry tag
    - **Tags**: Comma-separated tags for searchability
4. Click **"Upload Files"**
5. System processes and indexes documents
6. Documents appear in Knowledge Base immediately

Scraping URLs (Admin Only)

1. Navigate to **Admin** → **Knowledge Base** → **Scrape URLs**
2. **Enter URL**: Full website URL
3. **Configure**:
    - **Collection**: Select collection type
    - **Metadata**: Company, Platform, Service, Industry, Tags
4. Click **"Ingest URL"**
5. System scrapes content and indexes
6. Content becomes searchable in Knowledge Base

6. Admin Tools (Admin & Super Admin)

Available in **Admin** dropdown or **Settings** → **Admin Tools**.

User Management

- View and manage all users in your industries
- Create new users
- Assign industries to users
- Grant use case permissions
- Reset user passwords

Signature Management

- Create email/WhatsApp/LinkedIn signatures
- Add CTA buttons and calendar links
- Assign signatures to contacts, companies, or campaigns
- Manage signature versions

Bulk Operations

- **Batch Import**: Upload CSV/Excel files of contacts and companies
- **Bulk Export**: Export contacts/companies to Excel or Google Sheets
- **Bulk Actions**: Perform actions on multiple records simultaneously

Settings

- **Company Settings**: Configure default behaviors
- **Integration Settings**: Manage API connections
- **Email Configuration**: Set up email addresses and domains
- **WhatsApp Configuration**: Configure Twilio integration

Feature Workflows

Complete Workflow: Find Target → Send Pitch → Schedule Meeting

This workflow demonstrates the typical prospecting journey.

Step 1: Find Target (5 minutes)

1. Open **AI Target Finder**
2. Select **High Priority** preset
3. Choose your industry
4. Click **"Find Targets"**
5. Review recommendations and click **"Create Selected Targets"** for promising prospects

Step 2: Prepare Pitch (10 minutes)

1. Navigate to **Companies** tab
2. Find company of newly created contact
3. Click company name to open profile
4. Click **"Generate Pitch"** button
5. AI generates personalized pitch
6. Review and edit pitch as needed
7. Click **"Save Pitch"**

Step 3: Send Outreach (5 minutes)

1. Navigate to **Contacts** tab
2. Find your new contact
3. Click contact name
4. Click **"Send Email"**
5. **In Email Composer**:
    - Subject auto-suggested based on industry

    - Click **"Generate with AI"** for message body
    - AI references Knowledge Base for relevant insights
    - Click **"Use Pitch"** to include saved pitch
6. Click **"Send Email"**
7. Message sent immediately

Step 4: Schedule Meeting (3 minutes)

1. After sending email, return to contact
2. Click **"Schedule Meeting"**
3. **Configure Meeting**:
    - **Meeting Type**: 15-min, 30-min, or 60-min
    - **Preferred Dates**: Choose available slots
    - **Meeting Description**: Brief agenda
4. Click **"Schedule Meeting"**
5. Contact receives calendar invitation
6. Meeting appears in your **Dashboard** → **Meetings**

Step 5: Follow Up (Ongoing)

1. Monitor meeting in **Dashboard**
2. Before meeting, review **Contact Profile** → **Interaction History**
3. After meeting, add notes to contact
4. Track responses in **Activities** tab
5. Use **Analytics** to measure campaign effectiveness

Workflow: Create Campaign & Monitor Results

Creating a Multi-Contact Campaign:

1. Navigate to **Outreach** → **Campaigns**
2. Click **"Create Campaign"**
3. **Configure Campaign**:
    - Name: "Q4 Enterprise Sales Outreach"
    - Select Recipients: Check 20-30 contacts in your target list
    - Choose Template: Select email template or create custom
    - Enable **"AI Personalization"** (AI customizes per recipient)
    - Set **"Schedule"**: Spread sends over 3 days (avoid all at once)
4. **Review**: Check preview of different recipient variations
5. **Launch**: Click **"Start Campaign"**
6. Confirmation shows campaign created

Monitoring Campaign Results:

1. **Real-Time Dashboard**: **Dashboard** → **Campaigns** shows:
    - Emails sent count
    - Delivery rate
    - Open rate
    - Click rate
    - Reply rate
    - Overall engagement rate
2. **Activity Feed**: **Activities** tab shows:
    - All sent messages

    - Delivery status
    - When emails were opened
    - Which links were clicked
    - Replies received
3. **Follow Up Actions**:
    - Contacts who opened but didn't reply → Send follow-up
    - Contacts who replied → Move to "Engaged" status
    - Contacts who didn't open → Different channel (WhatsApp)

Best Practices

For Effective Prospecting

Before Reaching Out

1. **Research Target**:
    - Review company website
    - Check contact's LinkedIn profile
    - Read relevant Knowledge Base content
    - Understand pain points in their industry
2. **Quality Over Quantity**:
    - Create 5 well-researched targets daily
    - Better to send 5 personalized emails than 50 generic ones
    - Use AI Target Finder's High Priority preset for best matches
3. **Prepare Your Pitch**:
    - Generate pitches before sending outreach
    - Edit AI pitches to add personal touches
    - Reference specific company challenges
    - Include relevant case studies from Knowledge Base

During Outreach

4. **Personalize Messages**:
    - Use AI generation as starting point, not final message
    - Reference recipient by name
    - Mention specific company or role
    - Show you understand their business
5. **Choose Right Channel**:
    - **Email**: For first contact or detailed information
    - **LinkedIn**: For secondary outreach or connection building
    - **WhatsApp**: For direct business contacts with WhatsApp
6. **Include Clear CTA**:
    - Always include call-to-action (meet, call, respond)
    - Use "Schedule Meeting" feature to make booking easy
    - Include specific dates/times for meetings

After Sending

7. **Track Response**:
   - Check **Activities** tab daily for responses
   - Monitor **Response Rate** in Dashboard
   - Note what messaging works best
8. **Follow Up Systematically**:
   - No response in 3 days → Send follow-up email
   - No response in 7 days → Try different channel (WhatsApp)
   - No response in 14 days → Add to nurture sequence
9. **Build Relationships**:
   - Add notes after each interaction
   - Update contact status as engagement increases
   - Keep complete history of communication

Using AI Features Effectively

AI Message Generation

Good Prompts:

- "Generate professional email to VP Sales at e-commerce company"
- "Create WhatsApp message about reputation management services"
- "Write LinkedIn connection request for B2B SaaS founder"

Tips for Better Results:

- Give AI context (who, what, why)
- Specify tone (professional, friendly, casual)
- Mention key points to include
- Always review and personalize AI output

AI Target Finder

Best Practices:

- Start with **High Priority** preset to test accuracy
- Review **Confidence Scores** (prioritize 70%+)
- Batch create targets (5-10 per session)
- Regularly adjust search parameters based on conversion rates

Knowledge Base Integration

Leverage KB for Better Messaging:

- Click **"Use KB Content"** when composing emails
- Reference relevant case studies in pitches
- Include specific success metrics
- Show how your services apply to prospect's industry

Maintaining Data Quality

Contact Management

1. **Complete Information**:
   - Email addresses must be valid and current
   - Job titles should be accurate
   - Phone numbers for WhatsApp outreach
2. **Regular Updates**:
   - Update contact status after each interaction
   - Add notes about key conversation points
   - Remove duplicates immediately
3. **Activity Logging**:
   - Always log outreach in system (don't email outside VANI)
   - Track all responses in Activities
   - Keep complete interaction history

Company Management

1. **Accurate Details**:
   - Correct company name and domain
   - Proper industry classification
   - Accurate company size
2. **Contact Associations**:
   - Ensure contacts linked to correct companies
   - Group contacts by department if appropriate
   - Keep parent/subsidiary relationships clear

Troubleshooting

Common Issues & Solutions

Email Issues

Problem: Email not sending

Solution:

1. Verify recipient email is valid (no typos)
2. Check email is not on bounce list
3. Verify signature is configured (Admin → Signatures)
4. Check if email quota reached (typically 500/day)
5. If still failing, contact administrator

Problem: Email marked as spam

Solution:

1. Verify domain is authenticated (SPF/DKIM/DMARC)
2. Use professional subject line (no spam trigger words)
3. Include unsubscribe link in signature
4. Warm up domain before sending large volumes
5. Ask admin to verify DNS records

WhatsApp Issues

Problem: WhatsApp message not delivered

Solution:

1. Verify contact phone number is correct (include country code)
2. Check contact has WhatsApp app
3. Verify Twilio integration is active
4. Contact may have blocked number (check with them)
5. Contact administrator if issue persists

LinkedIn Issues

Problem: LinkedIn API not working

Solution:

1. LinkedIn API setup required by administrator
2. Verify LinkedIn connection is authorized
3. LinkedIn may rate-limit; wait and retry
4. Some account types cannot use LinkedIn API
5. Contact administrator for help

System Issues

Problem: Dashboard not loading

Solution:

1. Try refreshing page (F5 or Cmd+R)
2. Clear browser cache
3. Try different browser
4. Check internet connection
5. Contact administrator if still failing

Problem: Cannot access assigned industry

Solution:

1. Verify you're logged in with correct account
2. Check **Settings** → **Account** → **My Industries** to see assigned industries
3. If industry not showing, administrator needs to assign it
4. Try logging out and back in
5. Contact administrator if issue persists

Problem: Slow loading or timeouts

Solution:

1. Check internet connection speed
2. Close unnecessary browser tabs
3. Try accessing during off-peak hours
4. Clear browser cache and cookies
5. Contact administrator if consistently slow

Getting Help

Self-Service Resources

1. **This Guide**: Use search/find (Ctrl+F or Cmd+F) to locate topics
2. **In-App Help**: Hover over **?** icons for contextual help
3. **Settings** → **Help**: Links to documentation and FAQs
4. **Knowledge Base Query**: Search Knowledge Base for VANI documentation

Contacting Support

1. **In-App Support**: Click **"Support"** or **"Help"** in application
2. **Email**: Include:
    - Description of issue
    - Steps you took when issue occurred
    - Screenshot or video if possible
    - Your name and industry
3. **Direct Message**: Message administrator directly if urgent
4. **Response Time**: Non-critical (1-2 business days), Critical (same day)

Navigation Quick Reference

Keyboard Shortcuts

Shortcut	Action
`Ctrl+K` or `Cmd+K`	Open command palette/search
Ctrl+Home	Return to Dashboard
`/`	Jump to search
?	Show help menu
`Esc`	Close modals/dialogs

Common Navigation Paths

Goal	Path
Find & create targets	AI Target Finder → Create targets
Send email	Contacts → Select contact → Send Email
View sent messages	Activities tab or Contact detail view
Check response rate	Dashboard → View metrics
Access Knowledge Base	Knowledge Base → Query
Manage users	Admin → User Management
Upload documents	Admin → Knowledge Base → Upload
Schedule meeting	Contact detail → Schedule Meeting
Create campaign	Outreach → Campaigns → Create
View my settings	Settings → Account

Where to Find Common Tasks

Task	Location
Add Contact	Contacts tab → + Add Contact
Add Company	Companies tab → + Add Company
Find Prospects	AI Target Finder tab
Send Email	Outreach → Email or Contacts → Send Email
Send WhatsApp	Outreach → WhatsApp or Contacts → Send WhatsApp
Schedule Meeting	Contact detail → Schedule Meeting
View Analytics	Dashboard or Analytics tab
Query Knowledge Base	Knowledge Base → Query
Manage Users	Settings → Admin Tools → User Management
View Activities	Activities tab
Create Campaign	Outreach → Campaigns

Tips for Success

Daily Workflow Routine

Morning (15 minutes)

1. Check Dashboard for overnight responses
2. Review meeting schedule (today & tomorrow)
3. Add notes from previous day's calls
4. Check Activities for delivery failures

Working Hours (throughout day)

1. Use AI Target Finder to create 5-10 new targets
2. Generate pitches for created targets
3. Send personalized outreach emails
4. Monitor responses and follow up

End of Day (10 minutes)

1. Log notes from conversations
2. Update contact statuses
3. Schedule follow-ups
4. Review tomorrow's meetings

Weekly Review

1. **Metrics Review**: Check Dashboard for weekly trends
2. **Campaign Performance**: Analyze outreach results
3. **Response Analysis**: What messages got best responses?
4. **Engagement Tracking**: How many contacts moved to "Engaged"?
5. **Next Week Plan**: Schedule targets and campaigns

Monthly Goals

1. **Set Targets**: Decide monthly outreach volume
2. **Track Progress**: Monitor against targets in Dashboard
3. **Analyze Success**: Which industries/roles convert best?
4. **Optimize**: Adjust AI Target Finder settings based on success
5. **Plan**: Prepare for next month's campaigns

Understanding Your Application Interface

Header Navigation Bar

Located at top of page with:

- **Logo**: Click to return home
- **Main Tabs**: Contacts, Companies, AI Target Finder, Outreach, Dashboard
- **Search Bar**: Search contacts, companies, messages
- **Notifications**: Bell icon for system alerts
- **Settings**: Gear icon for account and system settings

Left Sidebar (if visible)

- Quick navigation to main sections
- Favorite features for quick access
- Collapsible for more screen space

Status Indicators

- **Green dot**: Online/Available
- **Red dot**: Offline
- **Yellow dot**: Idle
- **Grey dot**: Away

Button Colors & Actions

- **Blue buttons**: Primary action (Save, Send, Create)
- **Grey buttons**: Secondary action (Cancel, Back)
- **Red buttons**: Delete or destructive action
- **Green buttons**: Confirm or positive action

Conclusion

VANI is designed to make your outreach effective and data-driven. By following this guide and best practices:

- **You'll find prospects faster** using AI Target Finder
- **You'll send better emails** with AI generation and Knowledge Base
- **You'll track everything** with automatic activity logging
- **You'll measure success** with real-time analytics

Remember: The key to sales success is consistent, personalized outreach at scale. VANI gives you the tools; you provide the strategy.

Happy prospecting!

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For Questions: Contact your administrator or use in-app support
VANI Command Center: https://vani.theaicompany.co/command-center