How to use Primius.ai: Platform User Stories – Step-by-Step Guide

Overview

This document contains **detailed user stories** for navigating and using the AI-powered Primius.ai platform.
It is organized **by product** and **workflow phase**, enabling the conversational agent to provide precise, actionable guidance.
Each user story specifies **exact UI actions** and **what buttons to press**, ensuring users can follow along in real time.

---

1. Workspace Navigation

Getting Started

1. **Access Workspace** — Log in to Primius.ai and land on the **main workspace dashboard**.
2. **Sidebar Structure** — The left-hand navigation bar contains:
    - **Home** — Main dashboard with automation tiles.
    - **Knowledge Base** — ICP (Ideal Customer Profile) management + knowledge resources.
    - **Analytics** — Performance metrics and campaign insights.

Sidebar Navigation Items

- **Recent Workflows** — Lists completed automation runs in chronological order.
- **Account Status** — Shows current credit usage and subscription plan.
- **Upgrade Plan** — Direct button to upgrade when credits are low.

---

2. Product-Specific User Stories

2.1 PrimeLeads – Lead Generation Engine

User Story:

As a sales professional, I want to generate qualified leads from a target website.

Workflow Steps

Phase 1 – Website Entry

1. Click **Home** in the sidebar.
2. Click **PrimeLeads** automation tile *(pink/orange gradient, Users icon)*.
3. In the wizard modal, enter the **website URL**.
4. Click **Continue**.

Phase 2 – Processing

- The AI analyzes the site, displaying a **progress bar** (30–60 seconds typical).

Phase 3 – Reports Review

1. Review the **analysis results** and extracted company data.
2. Click **Continue**.

Phase 4 – ICP Selection

1. Select from **pre-built ICPs** or create a **custom ICP**.
2. Review target titles, industries, geography, and pain points.
3. Click **Continue with Selected ICP**.

Phase 5 – Leads Dashboard

- View **AI-qualified leads** with name, company, title, email, and AI score.

Navigation Actions

- **Export Leads** — Click “Export” in header.
- **Add to Outreach** — Use the three-dot menu → "Add to Outreach".
- **Sort by Score** — Click **AI Score** column header.
- **Filter by Status** — Use status badges above the table.

2.2 PrimeRecruits – Recruitment Automation

User Story:

As a recruiter, I want to find qualified candidates for a job opening.

Workflow Steps

Phase 1 – Job Description Upload

1. From **Home**, click **PrimeRecruits** tile *(purple/blue gradient, UserCheck icon)*.
2. Upload JD in PDF/DOC/DOCX.
3. Click **Continue**.

Phase 2 – Search Configuration

- Review AI-extracted requirements.
- Set **skills**, **experience level**, **location**, **salary range**, and filters.
- Click **Begin Candidate Search**.

Phase 3 – Candidate Dashboard

- Review AI-ranked candidate list with match scores.

Navigation Actions

- **Shortlist** — Click candidate row menu → "Shortlist".
- **Contact** — Move to outreach via PrimeReachOut.
- **Sort by Score** — Click match score column.
- **Bulk Actions** — Use top table checkbox.

2.3 PrimeReachOut – Outreach Automation

User Story:

As a salesperson or recruiter, I want to send personalized outreach to prospects or candidates.

Workflow Steps

Phase 1 – Integrations Verification

1. From **Home**, click **PrimeReachOut** tile *(orange/red gradient, Mail icon)*.
2. Verify connected email, CRM, and messaging platforms.
3. Add integrations if needed.

Phase 2 – Audience Selection

1. Import contacts from CRM, CSV, or previous campaigns.

2. Filter by industry, title, or company size.
3. Click **Continue with Selected Contacts**.

Phase 3 – Tone & Message Review

- Choose tone preset, adjust formality/warmth/brevity sliders.
- Preview generated messages.
- Click **Continue with This Tone**.

Phase 4 – Launch Confirmation

- Review campaign summary and schedule.
- Click **Launch Campaign**.

Phase 5 – Campaign Dashboard

- Monitor sends, track replies, and manage follow-ups.

---

3. Knowledge Base Management

3.1 Viewing ICPs

User Story:

I want to review all my saved Ideal Customer Profiles.

Steps

1. Click **Knowledge Base** in sidebar.
2. Click **View Full ICPs**.
3. Browse ICP tiles showing name, description, titles, industries, geography, pain points, and channels.

3.2 Creating a New ICP

User Story:

I want to create a new customer profile for targeting.

ICP Creation Wizard Flow

1. **Basic Info** — Name & description.
2. **Demographics** — Company size, industries, geography.
3. **Titles & Roles** — Positions, seniority, departments.
4. **Pain Points** — Challenges, objectives, buying triggers.
5. **Channels** — Communication methods, content preferences.

Click **Create ICP** to save.

---

4. Best Practices

Workflow Optimization

- Start with small datasets.
- Review and iterate based on results.

Credit Management

- Monitor usage in Account Status.
- Upgrade before running out of credits.

Data Quality

- Provide clean, accurate input data.
- Keep ICPs current.