

AI Business Assistant User Guide

Welcome to Your AI-Powered Business Assistant

This comprehensive guide will help you navigate and maximize the value of our AI business assistant platform. Our tools are designed to streamline your daily business operations through intelligent automation and export capabilities.

Platform Overview

Your AI business assistant includes three powerful applications:

- **Schedule Builder:** Creates detailed daily schedules based on your tasks and goals
- **Risk Register Builder:** Generates comprehensive risk assessments for business projects
- **Meeting Summarizer:** Produces clear, actionable meeting summaries

Getting Started

Accessing the Platform

1. Navigate to the main dashboard
2. You'll see three application tiles with descriptions
3. Click on any application to begin

Understanding the Interface

- Clean, professional design optimized for business use
- Conversational AI interface for natural interaction
- Built-in export functionality for practical business applications
- Responsive design that works on desktop and mobile devices

Schedule Builder - Complete Guide

How to Use Schedule Builder

Step 1: Start Your Conversation

1. Click "Schedule Builder" from the main menu
2. The AI will greet you and ask about your scheduling needs
3. Begin by describing your typical day, tasks, or specific scheduling requirements

Step 2: Provide Your Information

Share details about:

- Daily tasks and responsibilities
- Meeting commitments and appointments
- Priority levels for different activities
- Preferred working hours and break times
- Any constraints or special requirements

Example Input:

"I'm a marketing director who needs to schedule Tuesday. I have a team meeting at 9 AM, need to review campaign analytics, have a client lunch at 12:30 PM, want to work on budget planning, and prefer to finish by 6 PM."

Step 3: Review Your Generated Schedule

The AI will create a detailed schedule table including:

- Time Block: Specific time slots for each activity
- Task: Clear description of what you'll be doing
- Priority: Importance level (High, Medium, Low)
- Duration: How long each activity will take
- Energy Level: Indicated by lightning bolt symbols (⚡)

Step 4: Refine Your Schedule

- Ask for adjustments: "Can you move the budget planning earlier?"
- Request changes: "I need more time for the client meeting"
- Add new tasks: "Please include 30 minutes for email review"

Exporting Your Schedule

CSV Export

- Click "Export as CSV" to download a spreadsheet file
- Perfect for importing into Excel or Google Sheets
- Allows for further customization and sharing with team members

PDF Export

- Click "Export as PDF" to download a formatted HTML file
- Professional appearance suitable for printing or sharing
- Use your browser's print function to convert to PDF

ICS Calendar Export

- Click "Export as ICS" to download a calendar file
- Import directly into Outlook, Google Calendar, or Apple Calendar

- Automatically creates calendar events with proper time blocks

Tips for Best Results

- Be specific about time constraints and preferences
- Mention energy levels (when you work best)
- Include buffer time for unexpected tasks
- Specify any non-negotiable commitments

Risk Register Builder - Complete Guide

How to Use Risk Register Builder

Step 1: Describe Your Project

1. Click "Risk Register Builder" from the main menu
2. Provide comprehensive details about your business project or initiative
3. Include project scope, timeline, and key objectives

Step 2: Share Project Context

Describe:

- Project goals and deliverables
- Team size and stakeholders involved
- Budget constraints and resources
- Timeline and critical milestones
- Industry or market conditions

Example Input:

"We're launching a new product line in Q3. The project involves developing three new products, coordinating with manufacturing, creating marketing campaigns, and training the sales team. Budget is \$500K with a 6-month timeline."

Step 3: Review Risk Assessment

The AI will generate a comprehensive risk register including:

- Risk categories (Financial, Operational, Market, Technical)
- Risk descriptions and potential impacts
- Probability assessments and severity levels
- Mitigation strategies and preventive measures
- Contingency plans for high-priority risks

Step 4: Refine and Expand

- Ask for specific risk categories: "What about regulatory risks?"
- Request detailed mitigation: "How can we reduce supply chain risks?"
- Explore scenarios: "What if our main competitor launches first?"

Using Your Risk Register

- Export to CSV for team collaboration and tracking
- Use PDF format for stakeholder presentations
- Regular updates as project progresses
- Integration with project management workflows

Meeting Summarizer - Complete Guide

How to Use Meeting Summarizer

Step 1: Prepare Your Meeting Information

1. Click "Meeting Summarizer" from the main menu
2. Gather your meeting notes, recordings, or key discussion points
3. Have participant names and roles ready

Step 2: Input Meeting Details

Provide:

- Meeting type (team meeting, client call, planning session)
- Participants and their roles
- Main topics discussed
- Decisions made during the meeting
- Action items and assignments
- Follow-up requirements

Example Input:

"Weekly marketing team meeting with 5 participants. We discussed Q2 campaign performance, budget reallocation for Q3, new social media strategy, and upcoming product launch timeline. Sarah will lead the social media initiative, and we decided to increase digital ad spend by 20%."

Step 3: Review Generated Summary

The AI creates structured summaries with:

- Meeting overview and key participants
- Main discussion points organized by topic
- Decisions made with clear outcomes

- Action items with assigned owners and deadlines
- Next steps and follow-up requirements

Step 4: Customize and Export

- Request format changes: "Can you organize this by priority?"
- Add missing details: "Please include the budget figures discussed"
- Export for distribution to meeting participants

Export Functions - Detailed Guide

Understanding Export Options

CSV (Comma-Separated Values)

- Best for: Data analysis, spreadsheet manipulation, team collaboration
- Compatible with: Excel, Google Sheets, project management tools
- Use cases: Budget tracking, schedule analysis, risk monitoring

PDF/HTML Export

- Best for: Professional presentations, client sharing, archival
- Features: Clean formatting, professional appearance, print-ready
- Use cases: Stakeholder reports, documentation, formal communications

ICS Calendar Files (Schedule Builder only)

- Best for: Calendar integration, time management
- Compatible with: Outlook, Google Calendar, Apple Calendar, most calendar apps
- Features: Automatic event creation with proper time blocks

Export Best Practices

- Timing: Export after finalizing your AI conversation
- File naming: Downloads use descriptive names with timestamps
- Sharing: PDF/HTML formats are best for external sharing
- Integration: CSV files work best for further data manipulation

Advanced Usage Tips

Maximizing AI Performance

- Be specific: Provide detailed context and requirements

- Use business language: The AI understands professional terminology
- Iterate: Don't hesitate to ask for adjustments and refinements
- Context matters: More information leads to better results

Workflow Integration

- Morning planning: Use Schedule Builder to start your day organized
- Project kickoffs: Create risk registers before major initiatives
- Post-meeting: Summarize important discussions immediately
- Team coordination: Share exports with relevant stakeholders

Troubleshooting Common Issues

If exports aren't working:

- Ensure you've generated content (tables/summaries) before exporting
- Try refreshing the page and regenerating content
- Check that your browser allows downloads

If AI responses seem incomplete:

- Provide more detailed input
- Ask follow-up questions for clarification
- Use the "Start New" button to reset the conversation

For better results:

- Use clear, professional language
- Provide context about your industry and role
- Specify your preferences and constraints upfront

Getting the Most Value

Daily Workflow Integration

1. Morning: Use Schedule Builder to plan your day
2. Project Planning: Create risk registers for new initiatives
3. Post-Meeting: Generate summaries for team distribution
4. End of Day: Export and save important outputs

Team Collaboration

- Share exported schedules with team members
- Use risk registers in project planning meetings
- Distribute meeting summaries to all participants
- Maintain consistent documentation practices

Continuous Improvement

- Experiment with different input styles
- Learn from AI suggestions and recommendations
- Build templates based on successful outputs
- Integrate exports into existing business processes

This AI business assistant is designed to enhance your productivity and streamline business operations. The more you use it, the better you'll become at crafting inputs that generate exactly the outputs you need for your specific business requirements.