CLEARLOGIC ASSIST

ADMIN MANUAL · 2026

Console
Admin Guide

Everything you need to set up and manage your AI Receptionist — scenarios, prompts, tools, users and integrations.

CONTENTS

CHAPTER 1

First login & dashboard overview

Getting oriented in the console on day one.

Logging in

Go to **ai.clearlogicassist.com** and click **Sign In**. Enter the email and password you used when registering. If this is your first login after an administrator set your account, you will be asked to change your password immediately.

> 💡 **Tip** Use a strong password (12+ characters). You are the administrator — protect your account.

The dashboard

After login you land on the **Dashboard** tab. It shows a live summary of activity for your account:

- **Sessions today** — number of AI conversations in the last 24 hours
- **Leads captured** — contacts extracted from conversations
- **Active sessions** — calls or chats happening right now
- **Recent activity** — a timeline of the latest events

The sidebar

Navigation is on the left. Tabs you see depend on which features are enabled for your account:

🏠 **Dashboard** — live summary and activity feed

📇 **Leads** — captured contacts and callback/appointment requests

🧰 **Tools** — enable/disable AI capabilities (lead capture, appointments, etc.)

✨ **Features** — enable/disable optional features (transcripts, archive, live view)

💬 **Prompts** — configure what the AI says and knows about your business

T **Transcripts** — full conversation logs (requires Feature enabled)

📊 **Usage** — billing and usage statistics

Users — manage your team members

Settings — webhooks, email sender, advanced configuration

CHAPTER 2

Scenarios

A scenario defines the AI's behaviour for a specific channel (phone or website chat).

What is a scenario?

Think of a scenario as a **configuration profile** for your AI receptionist. Each scenario ties together a set of prompts (what the AI says), tools (what it can do) and voice settings. You can have multiple scenarios — for example, one for inbound phone calls and one for your website chat widget.

Creating a scenario

1. **Open the Prompts tab**

   Click 💬 **Prompts** in the sidebar. You will see a list of your existing scenarios.

2. **Click "+ New scenario"**

   A dialog appears asking for a **scenario name** and optionally a scenario to clone from. Cloning copies all prompts and tool settings — useful for creating a phone variant from a web scenario.

3. **Name it clearly**

   Use names like `phone_inbound`, `web_chat`, `after_hours`. No spaces — letters, digits and underscores only.

4. **Set as active (optional)**

   In the scenario selector at the top of the Prompts tab, you can mark which scenario is active for SIP (phone) and which is active for the web widget.

> **i Info** Your account starts with a default scenario pre-configured. You can edit it directly rather than creating a new one.

Deleting a scenario

Click the ✕ next to a scenario name. This also removes all associated tool prompts. The active scenario cannot be deleted — assign a different one first.

CHAPTER 3

Prompts

Prompts define your AI's personality, knowledge and behaviour.

The three core prompts

Every scenario has three prompts that work together:

PROMPT	PURPOSE	TYPICAL LENGTH
Welcome	The very first thing the AI says when it picks up. Sets tone and greeting.	1–3 sentences
Instruction	System instructions: the AI's role, name, personality and what it should/should not do.	200–600 words
Policy	Business-specific knowledge: services, prices, hours, FAQs, location.	100–500 words

Writing the Instruction prompt

This is the most important prompt. It tells the AI who it is. A good Instruction prompt includes:

- **Name and role** — e.g. "You are Sophie, the AI receptionist for Acme Property Group."
- **Tone** — e.g. "Speak in a professional but friendly tone. Be concise."
- **What to do** — e.g. "Help callers with enquiries about properties, capture their contact details and offer to book a callback."
- **What not to do** — e.g. "Do not quote prices. Do not discuss competitors."
- **Language** — e.g. "Always respond in the same language the caller uses."

> 💡 **Tip** Use the ✨ **Generate** button — paste your company website URL or a short description and the AI will write all three prompts automatically. Review and adjust before saving.

Writing the Policy prompt

The Policy is your AI's knowledge base. Include:

- Services and products you offer
- Pricing (or "contact us for pricing" if confidential)
- Opening hours and location
- Frequently asked questions and answers
- What happens after a lead is captured ("Someone will call you back within 2 hours")

Tool prompts

When tools are enabled (Lead Capture, Appointment Request, etc.), an additional **Tool Instructions** section appears in the Prompts tab. This lets you customise how the AI phrases its questions when collecting information — for example, what it says when asking for a name or preferred appointment time.

> ⚠ **Note** Always click **Save** after editing a prompt. Unsaved changes are lost if you navigate away.

CHAPTER 4

Tools

Tools extend what your AI can do during a conversation.

Available tools

TOOL	WHAT IT DOES	DEFAULT
Lead Capture	Asks the caller for name, phone and email. Saves as a lead in your console and sends a notification email.	Enabled
Appointment Request	Collects preferred date/time and service type. Sends confirmation emails to both the caller and your team.	Enabled
Send Email	AI can send a summary or follow-up email during the conversation (e.g. sending property details to the caller).	Optional
Warm Transfer	Bridges the call to a human agent in real time when the caller requests it.	Optional
Outlook Calendar	Checks real availability in your Outlook calendar and books confirmed appointments (requires n8n integration).	Optional

Enabling or disabling a tool

1. **Open the Tools tab (🧰)**

   You will see a list of all available tools with toggle switches.

2. **Click the toggle**

   Green = enabled. The AI will use this tool during conversations. Grey = disabled.

3. **Save changes**

   Click **Save** at the top of the Tools tab. Changes take effect on the next conversation.

> 💡 **Tip** Start with Lead Capture and Appointment Request enabled. Add more tools once the basic flow is working as expected.

Per-tool instructions

After enabling a tool, open the **Prompts** tab and scroll down to **Tool Instructions**. Here you can customise the exact wording the AI uses when invoking each tool — for example, how it asks for a callback number or confirms an appointment time.

CHAPTER 5

Features

Optional capabilities that can be enabled for your account.

Available features

FEATURE	WHAT IT UNLOCKS
Transcripts	Full text transcripts of every conversation, with AI-generated summary, intent classification and sentiment score.
Archive	Long-term storage of completed calls with audio metadata, duration and outcome tagging.
Live monitoring	Real-time view of active sessions — see the conversation as it happens, word by word.
Email logs	Log of every email sent by the system — notifications, confirmations, brochure requests.

Enabling a feature

1. **Open the Features tab (✨)**
   A list of all features appears with their current status.

2. **Click Enable**
   The feature activates immediately. The corresponding tab appears in the sidebar.

3. **Refresh the page**
   If the tab does not appear immediately, reload the console page.

> ⚠ **Note** Some features may carry an additional per-use or monthly charge. Your usage is shown in the **Usage (📊)** tab.

CHAPTER 6

Leads

Managing captured contacts and follow-up actions.

What is a lead?

A lead is created automatically when the AI captures a caller's contact details. Each lead record contains:

- Name, phone number, email address
- Type: **Lead**, **Callback request** or **Appointment request**
- Notes: any additional details captured during the conversation
- Status: current stage in your follow-up workflow
- Timestamp: when the lead was captured

Lead statuses

STATUS	MEANING
New	Just captured — not yet actioned by your team.
Contacted	Your team has reached out to this lead.
Confirmed	Appointment or callback confirmed.
Completed	Follow-up fully completed.
No show	Appointment was booked but the contact did not attend.
Cancelled	Lead or appointment was cancelled.

Working with leads

1. **Open the Leads tab (📥)**

   Leads are listed newest first. Use the filter buttons to view by status or type.

2. **Click a lead to expand it**

   See full contact details, notes from the AI conversation and the status history.

3. **Update the status**

   Use the action buttons to move the lead through your workflow. Add a note to record what was done.

💡 **Tip** Filter by **New** each morning to see overnight leads that need follow-up.

CHAPTER 7

Users

Adding and managing your team members.

User roles

ROLE	ACCESS LEVEL
Tenant Admin	Full access to all tabs — Prompts, Tools, Features, Settings, Leads, Transcripts, Users. Can create and manage team users. This is your role.
Company	Access to Leads, Dashboard and any Features that have been enabled. Cannot edit prompts, tools or settings.
Lead Operator	Access to Leads tab only. Suitable for sales staff who only need to see and action captured leads.

Creating a new user

1. **Open the Users tab (👥)**

   You see a list of all team members in your account.

2. **Click "+ Add user"**

   Fill in: email address, name, role and a temporary password.

3. **Send credentials to the user**

   The new user logs in with the temporary password and is immediately prompted to set their own.

Resetting a password

If a team member forgets their password, **you** reset it from the Users tab — click the user row, set a new temporary password and click Save. The user will be required to change it on next login.

> ⚠ **Note** Team members (Company / Lead Operator roles) cannot reset their own password by email. Only Tenant Admins can use the "Forgot password" link on the login page.

Deactivating a user

Click the user row and toggle **Active** to off. The user is immediately locked out but their data is preserved. You can reactivate at any time.

CHAPTER 8

Settings

Webhooks, email sender configuration and advanced options.

Accessing Settings

Click ⚙ **Settings** in the sidebar. Settings are grouped into sections — each section has its own **Save** button.

> ⚠ **Note** Settings are pre-configured for you when your account is created. Most users never need to change them. Contact support before modifying webhook URLs or advanced parameters.

Email Sender settings

FIELD	DESCRIPTION
From Name	Display name for outbound system emails (e.g. "Acme Receptionists").
From Email	Sender address for system emails. Must be authorised on the email relay.
Assistant From Name	Display name when the AI sends an email during a conversation.
Assistant From Email	Sender address for AI-initiated emails.

n8n Webhook settings

These URLs connect your AI assistant to automation workflows (email sending, calendar booking, CRM integrations). They are configured by ClearLogic Assist during onboarding. Do not change them unless instructed by support.

Analytics settings

FIELD	DESCRIPTION
Timezone	IANA timezone for your usage reports (e.g. `Europe/Malta`).
Work hours	Start and end hour for "in-hours" vs "out-of-hours" analytics breakdowns.
Work weekdays	Comma-separated list (1=Monday, 7=Sunday). Used for workday vs weekend statistics.

> 💡 **Tip** Set your timezone and work hours correctly — they affect how the Usage tab calculates your busiest periods and response rates.

Getting help

If you need assistance at any point:

- Email: **info@clearlogicassist.com**
- Use the AI assistant on the website — it can answer many setup questions directly
- Register at **ai.clearlogicassist.com** to access your console