

INBOX AI PRO

The Connected AI Communications & Automation Blueprint

Conversations, AI Receptionist, CRM, Automations, Zapier, Webhooks and Custom Integrations

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COMPANY POSITIONING

Inbox AI Pro is more than a website chatbot. It combines a centralized customer inbox, AI chat and voice reception, lead capture, scheduling, CRM, workflow automation and multiple paths for connecting outside software.

Capabilities are subject to the activated package, geographic availability, third-party platform rules, account permissions, API access and implementation scope.

IMPORTANT CONFIDENTIALITY NOTE

This technical capability document is confidential and is not to be shared, published anywhere, or provided to potential clients. This is for internal use only to help our sales team to understand the full capabilities of this product.

00

Executive Overview

What the platform does, how integrations work and how agencies should position it

Inbox AI Pro combines customer communications, AI employees, CRM records, appointment scheduling and workflow automation in a single operating environment.

The system can answer questions, capture and qualify leads, schedule appointments, route calls, update CRM records, send follow-up messages and trigger actions in connected systems. More advanced workflows can connect through Zapier, webhooks, custom REST APIs or MCP tools.

Conversations A shared inbox for website chat, email, SMS, WhatsApp, Facebook Messenger, Instagram direct messages and supported voice interactions.	AI Receptionist AI employees that answer, qualify, book, route, retrieve data and execute approved actions according to configured instructions.
CRM Contacts, companies, opportunities, activities, notes, tasks, ownership, custom fields and communication history in one record.	Automations Trigger-based workflows that send messages, update records, assign work, call AI, branch by conditions and connect outside systems.
Knowledge Base Approved business information from web pages, documents, spreadsheets, FAQs and custom text used to ground AI responses.	Integration Layer Native channels, documented connectors, Zapier, inbound/outbound webhooks, custom APIs and MCP-based tool connections.

The five integration levels

Level	Connection Type	Best For	Typical Complexity
1	Native communication channels	Chat, email, SMS, WhatsApp, social DMs and supported voice	Standard setup
2	Built-in platform functions	CRM, forms, meetings, campaigns, tasks, summaries and internal automations	Standard to advanced no-code
3	Documented application events	Starting workflows from defined events in connected industry systems	Connector configuration
4	Zapier and webhooks	Moving event data between thousands of apps and custom endpoints	No-code to technical
5	Custom API and MCP	Real-time lookups and actions in external systems	Developer-led discovery and build

THE KEY SALES DISTINCTION

A platform appearing in an automation trigger list does not mean the AI has unrestricted two-way access to everything in that application. Full AI interaction may require API access, permissions, custom tools and implementation work.

Inside this guide

Section	What It Covers
1. Conversations	Supported customer communication channels and practical channel limitations.
2. AI Receptionist	Lead capture, qualification, scheduling, routing, voice and specialized AI employees.
3. Knowledge Base	How approved business content grounds responses and when live integrations are needed.
4. CRM	How contacts, companies, opportunities, tasks and conversation history are managed.
5. Automations	Triggers, conditions, actions, branching logic and example workflows.
6. Integration Architecture	Native functions, documented events, Zapier, webhooks, APIs and MCP.
7. Integration Examples	Commerce, field service, accounting, industry applications and calendars.
8. Industry Use Cases	What agencies can propose for home services, legal, automotive, retail and more.
9. Scope & Limitations	What partners should verify and what should never be promised without discovery.
10. Discovery Checklist	Questions to ask before quoting or approving an integration.

01

Conversations

One customer inbox across supported digital and voice channels

Conversations centralizes customer messages so the AI and human team can work from the same communication history.

Supported channel overview

Channel	AI Response	Lead Capture	Booking / Action	Key Considerations
Website Chat	Yes	Yes	Booking, custom tools, follow-up	Floating or embedded widget; page-aware context can be used.
Email	Yes	Yes	Booking links, workflows, CRM logging	Existing inboxes can generally forward messages into Conversations.
SMS / MMS	Yes	Yes	Reminders, follow-up, missed-call text-back	United States and Canada; registration and consent rules apply.
WhatsApp Business	Yes	Yes	Templates, follow-up, automations	Meta verification, outbound-template and response-window rules apply.
Facebook Messenger	Yes	Yes	Booking and workflow triggers	Business Pages; public comments are separate from Messenger.
Instagram DMs	Yes	Yes	Booking and follow-up	Eligible Business or Creator account; outbound restrictions apply.
Voice / Phone	Yes	Yes	Booking, routing, lookup, call transfer	Availability, call forwarding and recording laws vary.

Website Chat

Website Chat can operate as an always-available digital receptionist, lead qualifier, scheduler, product assistant or support assistant.

- Answer common questions using approved business information.
- Capture names, emails, phone numbers and other qualification details.
- Identify the service, product, location, budget, urgency or timeline involved.
- Save the lead and conversation history to the CRM.
- Offer appointments, provide booking links or use an external scheduling tool.
- Use custom API tools to check live inventory, service eligibility or order information.
- Trigger internal alerts, follow-up tasks and automated messages.
- Deploy as a floating widget, embedded chat area or button-triggered conversation.

Page-aware conversations

The website URL being viewed can be used as context. When combined with a connected product, vehicle, property or inventory system, the AI can determine which item a visitor is discussing and request current information.

EXAMPLE

A visitor viewing a specific vehicle, property or product page can ask, “Is this still available?” The AI can use the current page URL to identify the item and query a connected inventory source.

Specialized widgets and AI employees

A business can create different website experiences for different pages or purposes, such as a sales assistant on a pricing page, a booking assistant on a service page and a support assistant in a help center.

Email

- Receive and answer customer emails from a shared Conversations inbox.
- Forward an existing Gmail, Outlook, Microsoft 365 or other supported mailbox into the platform.
- Use AI to answer common questions, capture lead information and recommend next actions.

- Store email activity with the associated CRM contact.
- Trigger booking, assignment, task and follow-up workflows.

EMAIL SENDING NOTE

The sending address used by Conversations may differ from the client’s existing custom-domain inbox. Custom-domain campaign sending and one-to-one Conversations email are not always configured the same way.

SMS and MMS

- Two-way customer texting from a platform-provided local number.
- AI-led lead qualification and follow-up through the same customer thread.
- Appointment confirmations, reminders and missed-call text-back.
- CRM contact creation and complete message history.
- Human team visibility and response from the shared inbox.

COMPLIANCE REQUIREMENT

United States messaging generally requires A2P 10DLC registration, compliant consent language, privacy disclosures and carrier approval. Canadian and cross-border requirements differ. Opt-outs and carrier rules must always be respected.

WhatsApp Business

- Receive customer WhatsApp inquiries inside Conversations.
- Allow AI or staff to respond and retain the message history.
- Send approved outbound templates through Automations.
- Support international customer communication where the account is eligible.
- Use qualifying accounts with WhatsApp Coexistence so the mobile app and Inbox AI Pro can both be used.

META RULES APPLY

Business-initiated messages may require approved templates. Normal free-form replies are governed by the current customer-service window. Account verification, message quality, limits and Meta charges are outside Inbox AI Pro’s control.

Facebook Messenger and Instagram direct messages

Eligible Facebook Business Pages and Instagram Business or Creator accounts can feed direct messages into Conversations for AI response, lead capture, booking and workflow activation.

Supported	Do Not Assume
Facebook Messenger conversations	Personal Facebook account messaging
Instagram direct messages	Unrestricted cold outbound Instagram messaging
AI and human replies in the shared inbox	Automatic response to every public social comment
CRM capture and automation triggers	Full control of social posts or advertising

AI Voice Receptionist

- Answer inbound calls with a configured greeting, tone and business identity.
- Answer approved questions, capture caller information and identify intent.
- Qualify new leads and distinguish sales, service, support and urgent calls.
- Check availability and schedule appointments where supported.
- Transfer callers to employees, departments or on-call destinations.
- Use different routing rules during business hours, after hours or for VIP callers.
- Query connected systems for customer, appointment, job, product or order information.
- Save call activity, summaries, transcripts or recordings when included and legally permitted.

- Trigger follow-up messages, tasks and internal notifications after the call.

Keeping an existing business phone number

Clients can often retain their public number and use their existing carrier or VoIP routing to forward calls to the AI Receptionist. Forwarding may apply to all calls, after a ring delay, outside business hours, during overflow or when staff do not answer.

TRANSFER LIMITATION

Once a call is transferred away from the AI, transcription may stop. If the destination does not answer, the call may not automatically return to the AI. The behavior depends on the destination telephone system.

02

AI Receptionist & AI Employees

From basic answers to multi-step customer workflows

AI employees are configured roles with specific instructions, channels, Knowledge Base access and capabilities.

Core AI capabilities

Answer Questions Hours, locations, services, products, pricing, policies, warranties, financing, service areas and approved FAQs.	Capture Leads Name, email, phone, company, service interest, budget, timeline, location, urgency and custom qualification data.
Qualify & Route Determine fit, urgency, service eligibility, department, geography, value or the need for human review.	Schedule Offer available times, create appointments, send confirmations or provide approved booking links.
Retrieve Live Data Use custom tools to check inventory, appointment capacity, customer history, orders, invoices, job status or other real-time information.	Perform Actions Create records, book work, update external systems, generate carts or trigger workflows when an approved integration allows it.

Lead capture and qualification

The AI can collect standard and custom information, ask questions in a defined sequence and change the path based on the prospect’s answers.

- Identify high-value or urgent opportunities.
- Separate sales inquiries from support or existing-customer requests.
- Check whether the prospect is inside a service area.
- Route different services to different people or departments.
- Create a task when a human must verify the lead.
- Offer booking only after required qualification information has been captured.
- Apply tags, assign ownership and create an opportunity through Automations.

Appointment scheduling

- Connect to the platform meeting scheduler and retrieve availability.
- Offer time slots and collect required booking information.
- Create appointments and trigger confirmations and reminders.
- Support multiple appointment or service types in chat-based workflows.
- Include supported video-meeting links when configured.
- Provide an external booking link when direct booking is not available.

- Use custom APIs for supported external scheduling platforms.

VOICE SCHEDULING CAVEAT

Voice booking can have more constraints than chat booking. Selecting a specific staff member, service resource or advanced appointment logic may require a custom integration or human follow-up.

Routing and escalation

Decision Signal	Possible Action
Sales vs. support	Route to different AI instructions, owners, departments or follow-up workflows.
New vs. existing customer	Collect lead details or retrieve an existing account and service history.
Emergency vs. routine	Attempt an urgent transfer, notify on-call staff and create a priority task.
Inside vs. outside service area	Continue to booking or provide an approved alternative response.
High-value or VIP customer	Use priority routing and alert designated staff.
Business hours vs. after hours	Change transfer destinations, message scripts and escalation paths.

Specialized AI employee examples

AI Receptionist General front-desk coverage across chat and voice.	Inside Sales Representative Lead qualification, objection handling, appointment setting and follow-up.
Customer Support Representative FAQs, troubleshooting, account lookup, ticket creation and escalation.	Appointment Coordinator Availability, booking, confirmation, rescheduling and reminders.
Product Specialist Product search, recommendations, inventory lookup and cart creation.	Intake Specialist Structured intake for legal, healthcare, home service or professional services.
After-Hours Dispatcher Urgency detection, service-area validation and on-call escalation.	Property or Vehicle Assistant Page-aware item questions, qualification and showing/test-drive booking.

Language support

Chat-based AI can communicate across many languages and generally responds in the language used by the customer. Voice-language availability depends on the configured voice and current supported options.

03

Knowledge Base

Grounding AI responses in approved business information

The Knowledge Base provides the AI with trusted reference material so responses reflect the client’s actual business.

Information sources

Source Type	Examples
Business information	Hours, location, contact information, service area and company description.

Source Type	Examples
Website content	Home page, service pages, product pages, policy pages and FAQs.
Uploaded files	PDF, DOCX, TXT, CSV, PPTX, XLSX, XLS, HTML, Markdown, JSON, JSONL, JPG, JPEG and PNG.
Manual entries	Approved pricing, scripts, procedures, qualification rules and custom facts.
External live systems	Inventory, availability, account, order, invoice and job data through custom integrations.

Static knowledge vs. live data

Use the Knowledge Base For	Use a Live Integration For
Hours, policies and service descriptions	Current appointment availability
General pricing and package explanations	Real-time product pricing or inventory
Shipping, warranty and return rules	Customer-specific order or account status
Frequently asked questions	Technician capacity or job status
Internal procedures and approved scripts	Invoice balances, payment status or dynamic quotes

IMPORTANT DESIGN PRINCIPLE

Mandatory behavior belongs in AI instructions and capability rules. The Knowledge Base uses semantic retrieval and may not load every document for every message.

Knowledge segmentation

Different AI employees can receive different approved content. A sales AI might access pricing and qualification material, while a support AI receives troubleshooting and policy documents. Location-specific agents can be limited to their own services and hours.

Response review and optimization

Authorized users can review conversation outcomes and, where supported, the explanation behind an AI response. This helps identify which information was used, whether a capability was triggered and where content or instructions should be improved.

- Review real customer questions after launch.
- Correct outdated or conflicting business information.
- Strengthen instructions for required qualification or compliance behavior.
- Test failure paths and human escalation rules.
- Monitor API responses and external system errors.

04

CRM & Lead Management

Turning conversations into organized records and follow-up

Conversation data can become actionable CRM information instead of remaining trapped inside isolated chat or messaging tools.

CRM record capabilities

Contacts Names, emails, phones, tags, custom fields, owner assignment, source and communication history.	Companies Business records, associated contacts, ownership, notes and account activity.
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Opportunities Pipeline stage, value, owner, status, source and follow-up activity.	Activities Calls, meetings, emails, notes, tasks and recorded customer interactions.
Custom Objects Structured records for use cases not covered by standard contacts, companies or opportunities.	Campaigns Follow-up sequences and messaging initiated by qualifying events or staff action.

Typical lead workflow

1. A prospect starts a website chat, sends a message or calls the AI Receptionist.
2. The AI answers questions and captures required contact and qualification data.
3. A CRM contact is created or updated using the matching rules configured for the workflow.
4. Tags, custom fields, lead source and conversation notes are applied.
5. The lead is assigned to a salesperson or department.
6. An opportunity and follow-up task are created when appropriate.
7. The prospect receives an immediate confirmation or follow-up message.
8. The internal team receives a notification with the conversation summary and next action.

DUPLICATE MANAGEMENT MATTERS

Advanced integrations should define which system is authoritative and how contacts are matched. Exact email, telephone-only matches, partial matches and duplicate records may need different handling rules.

CRM actions available through workflows

- Create or update contacts and companies.
- Associate contacts with companies.
- Create and update opportunities and pipeline stages.
- Assign contact or company owners.
- Apply tags and update custom fields.
- Create notes, tasks, calls, meetings and email activities.
- Record lead sources and AI conversation summaries.
- Start or pause approved campaigns.
- Create and update custom-object records.

05

Automations

Event-driven workflows that connect customer conversations to business actions

Automations are built from a trigger, optional conditions and one or more actions.

Common triggers

Trigger Category	Examples
Conversations and AI	Website Chat lead captured, AI conversation summary created, customer interaction recorded.
CRM	Contact, company, opportunity, custom object, note, meeting, call, task or list event.
Forms and campaigns	Form submission, campaign activity or stage/status change.
Time and staff action	Scheduled date/time, manual workflow start or list-based batch start.
External systems	Zapier, inbound webhook or a documented event in a connected application.

Common actions

Action Area	Examples
Customer messaging	Send SMS, plain-text email, approved WhatsApp template or review request.
Voice	Place an outbound AI phone call where supported.
CRM updates	Create/update contacts, companies, opportunities, notes, tasks, calls and ownership.
Internal coordination	Notify employees, assign owners, create follow-up tasks and escalate errors.
Campaigns	Start, pause or sequence follow-up communication.
AI processing	Send information to an AI employee or model and use the generated output in later steps.
External actions	Send an outbound webhook, start another automation or pass data into Zapier.

Workflow logic

- Fixed delays and date/time waits.
- Wait until a specific event occurs.
- If/else branches and multiple conditional paths.
- Rate limits and entry-frequency controls.
- A/B branches and path testing.
- Jumps to another step or another automation.
- Stop conditions, error handling and error notifications.

Example automation blueprints

New Website Lead Chat captures lead → create/update contact → assign owner → send SMS → notify salesperson → create task → start nurture.	Missed Call Text-Back Call missed → send immediate SMS → AI continues conversation → captures need → offers booking → escalates urgent requests.
Appointment Follow-Up Appointment completed → wait → send thank-you → request review → branch based on response or sentiment.	Paid Invoice Payment event received → update CRM → send thank-you → start review request or future service reminder.
Unanswered Lead New lead → immediate message → wait → second follow-up → create call task → move to long-term nurture.	Emergency Request AI detects emergency language → capture location → validate eligibility → attempt transfer → notify on-call staff → create urgent task.
Completed Service Job completion event → update customer → send satisfaction message → request review or create recovery task.	Won Opportunity Opportunity won → send data to Zapier → create external project/invoice/customer → notify delivery team.

06

Integration Architecture

How Inbox AI Pro connects to other software

There are multiple integration paths. The correct method depends on whether the client needs an event trigger, data synchronization, a real-time lookup or an action inside the outside system.

Level 1 — Native communication connections

Designed for customer interaction channels such as Website Chat, email forwarding, SMS/MMS, WhatsApp Business, Facebook Messenger, Instagram DMs and supported voice services.

Level 2 — Built-in platform functions

CRM contacts, companies, opportunities, custom objects, forms, meetings, activities, tasks, campaigns, review requests, Knowledge Base, conversation summaries and Automations work inside the Inbox AI Pro environment.

Level 3 — Documented application events

Specific events from supported applications can trigger a workflow. An event connector is useful for “when this happens, do that” processes, but may not provide full read/write access to the third-party application.

Level 4 — Zapier and webhooks

Zapier and webhooks move structured data between systems and are commonly used for no-code or low-code workflow integration.

Direction	Example
Inbox AI Pro → Zapier	Opportunity marked won → create accounting customer → create project → notify Slack or Teams.
Zapier → Inbox AI Pro	Payment received → start automation → update contact → send thank-you → request review.
Inbound webhook	A custom application sends a POST request to start an automation.
Outbound webhook	An automation sends a JSON payload to an external endpoint or middleware service.

ZAPIER SCOPE

Zapier connects to thousands of applications, but every app exposes a different set of triggers, actions and fields. Premium apps, webhooks, multi-step workflows and high volume may require a paid Zapier plan.

Level 5 — Custom API and MCP capabilities

Custom capabilities allow an AI employee to retrieve data or perform approved actions in an external system. Configuration can be imported from a cURL request, built manually as a REST request or connected through Model Context Protocol (MCP).

Technical Element	What It Enables
GET	Retrieve data such as inventory, availability, account, order or job information.
POST	Create records, bookings, jobs, carts, tickets or other supported actions.
PUT / PATCH	Replace or update an existing external record.
DELETE	Remove information when the external API and approved workflow permit it.
Authentication	API keys, bearer tokens, headers, query parameters and required credentials.
Multiple tools	Combine lookup, validation and write actions inside one business capability.
MCP	Connect an AI employee to a compatible tool server that exposes structured capabilities.

What must exist for a custom integration

- Accessible and current API documentation.
- Valid credentials and the required permissions or scopes.
- Endpoints that support the exact data and actions requested.
- A subscription tier that includes API access when required.
- Clear data mapping, matching and duplicate rules.
- Defined failure behavior and human escalation.

- Testing against real-world scenarios and error responses.
- Ongoing monitoring when the external provider changes its API.

07

Integration Examples

Documented connections and representative implementation patterns

Commerce and Shopify

A connected commerce storefront can allow the AI to provide a guided shopping experience across supported channels.

- Search products and retrieve current product information.
- Check current price and availability.
- Answer product questions using live catalog data and static Knowledge Base content.
- Create or update a cart.
- Add selected items to the cart.
- Generate and send a checkout link.
- Continue the shopping journey through chat, SMS, social messaging, WhatsApp or supported voice.

Similar workflows may be developed for WooCommerce, BigCommerce, Magento, custom e-commerce stores and inventory platforms when the required API is available.

ServiceTitan and home-service operations

A properly scoped field-service integration can connect the AI Receptionist to customer, scheduling, job and billing information.

- Find a customer by name, telephone or email.
- Retrieve customer details and service history.
- View upcoming appointments.
- Check scheduling availability or technician capacity when the account supports it.
- Create bookings, service calls or jobs.
- Update jobs and retrieve current job status.
- Access invoice or billing information when permitted.
- Provide arrival or technician information when that data is exposed.

ACCOUNT FEATURE DEPENDENCY

Real-time scheduling and automated booking may require additional modules, permissions or subscription features in the external field-service platform. Without them, the AI can still capture the request and create a task for manual scheduling.

QuickBooks and accounting events

Documented workflow events can include invoice, payment and sales-receipt changes. These events can start a follow-up automation. Additional accounting workflows may be possible through Zapier or a supported API.

Kixie

Documented automation actions can add or remove contacts from supported Kixie power lists.

Calendar and meeting systems

- Use the built-in meeting scheduler for supported availability and booking.
- Include supported Google Meet or Microsoft Teams meeting information when configured.
- Provide external booking links for unsupported scheduling platforms.
- Use Zapier, webhooks or custom APIs when the external scheduling system exposes the required actions.

Documented third-party automation events

Industry	Application	Documented Event Example
Legal	Clio	Matter closed
Dental	Dentrix	Appointment closed
Home services	FieldEdge	Work order finalized
Home services	Housecall Pro	Job finished
Home services	Jobber	Job or visit completed
Home services	JobNimbus	Contact or job status changed
Home services	ServiceFusion	Job closed
Home services	ServiceMonster	Invoice created for a contact
Home services	ServiceTitan	Job completed
Wellness	Mindbody	Visit completed
Pet care	Gingr	Reservation checked out
Pet care	PawLoyalty	Appointment checked out
Pet care	PawPartner	Customer checked out
Pet care	PetExec	Order completed
Pet care	Pet Resort Pro	Invoice checked out
Automotive	Mitchell Manager SE	Repair order completed
Automotive	NAPA TRACS / Enterprise	Repair-order invoice closed
Automotive	Protractor	Invoice posted
Automotive	RBCS	Sale or service completed
Automotive	ROWriter	Repair-order invoice closed
Automotive	ShopBoss	Repair-order invoice closed
Automotive	ShopMonkey	Invoice paid
Automotive	Shop-Ware	Repair-order invoice picked up
Automotive	Tekmetric	Repair order posted
Retail	Lightspeed	Sale completed
Accounting	QuickBooks / Desktop	Invoice, payment or sales receipt event

CONNECTOR INTERPRETATION

These entries represent documented event triggers. They should not be marketed as full, unrestricted two-way AI integrations unless the specific workflow and available actions have been verified.

08

Industry Use Cases

Examples agencies can scope for clients

The following are representative use cases. Each must be validated against the client’s software, permissions, geography, security requirements and desired workflow.

Home Services

- Confirm whether an address is inside the service area.
- Identify the requested service and urgency.
- Retrieve customer history and upcoming appointments.

- Check technician or appointment capacity.
- Create a booking, service call, job or callback task.
- Retrieve job status, invoice status or estimated arrival information.
- Escalate emergencies to on-call staff.

E-Commerce & Retail

- Search products and recommend options.
- Check inventory, variants, prices and store availability.
- Create carts and generate checkout links.
- Retrieve order and shipment status.
- Begin return, warranty or support workflows.
- Create support tickets and route complex issues.

Automotive

- Collect vehicle and service information.
- Retrieve service history or repair status.
- Schedule service and create follow-up tasks.
- Check parts or appointment availability when exposed by the connected system.
- Notify customers when a vehicle is ready.
- Start post-service review requests.

Legal & Professional Services

- Conduct structured initial intake.
- Identify the requested practice or service area.
- Collect conflict-check or qualification information.
- Schedule a consultation.
- Create an intake record and staff-review task.
- Send approved forms and next-step instructions.

Real Estate

- Identify a property from the current webpage.
- Retrieve listing details and availability.
- Collect buyer, seller, budget and financing information.
- Schedule a showing or consultation.
- Route the lead to the appropriate agent or market.
- Create a CRM opportunity and follow-up sequence.

Healthcare & Dental

- Answer general office and policy questions.
- Collect non-diagnostic intake information.
- Offer or request appointment times.
- Send forms and create staff follow-up tasks.
- Route urgent messages according to approved procedures.
- Operate only within verified privacy, security and regulatory requirements.

Customer Support

- Look up account, service, order or ticket information.
- Search approved troubleshooting content.
- Create or update a support ticket.
- Assign and escalate urgent issues.
- Notify an account manager or technical team.

- Provide approved status updates from a live system.

Quotes & Estimates

- Gather the required job or product information.
- Validate service-area and qualification requirements.
- Request pricing from an external system.
- Create a preliminary estimate or quote record.
- Send a quote link or create a task for formal review.
- Require human approval for complex, regulated or high-value quotes.

PROFESSIONAL BOUNDARIES

The AI should not make medical, legal, financial, engineering or other regulated professional determinations beyond the client’s approved scope. Sensitive workflows require separate privacy, security and compliance review.

09

Scope, Limitations & Partner Positioning

How to sell the capability without overpromising

What agencies should not promise without verification

- “It integrates natively with every CRM.”
- “Every Zapier app becomes a complete AI integration.”
- “The AI can automatically do anything inside any software.”
- “No setup, credentials or development are required.”
- “Every integration is included at no additional cost.”
- “The AI can access all customer records automatically.”
- “Every calendar supports real-time booking.”
- “SMS, voice and social capabilities work in every country.”
- “All WhatsApp outreach can be sent without templates.”
- “Any regulated data can be handled without a separate review.”

Recommended partner language

USE THIS POSITIONING

Inbox AI Pro includes native communication channels, CRM and workflow automation. It can also connect with thousands of applications through Zapier, webhooks, documented connectors and custom API capabilities. The exact workflow depends on what the external application allows and may require credentials, subscriptions, configuration or custom development.

Operational limitations to discuss

Area	What Must Be Verified
External CRM	Connector method, read/write actions, record matching, source of truth and duplicate rules.
API	Public access, permissions, required subscription, endpoints, rate limits and allowed data use.
SMS	Country, number type, registration, consent, opt-out handling and carrier limits.
WhatsApp	Account eligibility, verification, templates, customer-service window, limits and charges.
Social	Business-account eligibility, direct-message rules and the difference between DMs and public comments.
Voice	Country, carrier forwarding, routing, transfer behavior, recording consent and number configuration.
Scheduling	Calendar connection, resources, service types, staff selection, write access and time-zone handling.

Area	What Must Be Verified
Sensitive Data	Privacy, security, contractual, regulatory and retention requirements.
Accuracy	Current Knowledge Base, clear prompts, live data quality, escalation and ongoing conversation review.

Integration scoping levels

Scope	Description	Examples
A — Standard setup	No custom development in most cases.	Website Chat, FAQs, lead capture, CRM records, basic booking, email forwarding, social messaging.
B — Advanced no-code	Workflow design and configuration.	Conditional follow-up, opportunity creation, review requests, SMS/email sequences, standard Zapier actions.
C — Webhook / advanced Zapier	Technical mapping and testing.	External forms, payments, project creation, CRM handoff, specialized event workflows.
D — Custom API or MCP	Developer discovery and implementation.	Live inventory, external booking, account lookup, job creation, order status, invoice data, custom quotes.
E — Discovery required / unsupported	The system or risk profile may block the request.	No API, prohibited access, missing endpoint, insufficient subscription, unacceptable compliance risk.

What a scoped integration proposal should include

- Defined customer journey and the communication channel where it begins.
- Exact trigger event and the data required to continue the workflow.
- Specific read and write actions for every connected system.
- System-of-record decision, identity matching and duplicate-handling rules.
- Required credentials, subscriptions, API permissions and third-party approvals.
- Failure handling, internal notifications and the point of human escalation.
- Test scenarios, acceptance criteria and measurable success indicators.
- Ownership for ongoing monitoring, maintenance and future platform changes.

APPROVAL GATE

Do not quote an advanced integration as confirmed until the external software, required endpoint, permissions, data fields and failure path have been validated.

10

Client Discovery Checklist

Questions to answer before quoting an integration

Use this checklist to convert a general “Can it integrate?” question into a defined, testable workflow.

1. Which communication channels are required: chat, voice, SMS, WhatsApp, email or social direct messages? 2. What CRM does the client currently use? 3. What scheduling, calendar or booking system is in place? 4. What industry-specific software does the client use? 5. What exact customer request should the AI handle? 6. What exact event should start the workflow? 7. What information must be read from the external system? 8. What records or actions must be created or updated? 9. Does the external software provide an API or supported Zapier connector? 10. Does the client’s subscription include API access and the required endpoints?	11. Which system is the authoritative source of customer and transaction data? 12. How should exact matches, possible duplicates and unmatched records be handled? 13. What should happen when required data is missing? 14. What should happen when the external system is unavailable or returns an error? 15. When must the AI stop and transfer or escalate to a human? 16. Are regulated, confidential, financial, legal, health or payment records involved? 17. What customer consent and disclosure language is required? 18. What message, call, webhook or API volume is expected? 19. Who will provide credentials, test accounts and technical documentation? 20. How will the agency and client define a successful implementation?
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DISCOVERY OUTCOME

A complete discovery should produce one sentence that defines the trigger, the customer or record to match, the information to retrieve, the action to perform, the system of record and the human fallback.

Integration request worksheet

Use this page during discovery calls to document the exact workflow before the integration is quoted or approved.

Discovery Field	Agency Notes
Business objective	
Customer channel(s)	
Trigger event	
Information to retrieve	
Action to perform	
External system	
API / Zapier availability	
System of record	
Matching / duplicate rules	
Human escalation point	
Compliance considerations	
Expected volume	
Success metric	

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Quick Reference

Fast answers for common agency partner questions

Question	Partner Answer
Can Inbox AI Pro answer website visitors 24/7?	Yes. It can answer approved questions, capture leads, qualify prospects, schedule or provide a booking path and trigger follow-up workflows.
Can it use the client’s existing phone number?	Often yes through carrier or VoIP call forwarding. The exact setup depends on the client’s telephone provider and desired routing.
Can it connect to a client’s CRM?	Potentially. The method may be a documented connector, Zapier, webhooks or a custom API. A native two-way connection should not be assumed.
Can it book appointments?	Yes through supported scheduling functions, booking links or a custom integration when the external scheduling platform allows it.
Can it check live inventory or order status?	Yes when the external system provides an accessible API and the required custom capability is configured.
Can it send texts?	Yes in supported regions and configurations. Registration, consent, carrier and opt-out rules apply.
Can it use WhatsApp, Facebook and Instagram?	Yes for eligible business accounts and supported direct-message workflows. Third-party platform rules still apply.
Does Zapier mean it connects to every app automatically?	No. Zapier provides access to thousands of apps, but each connector has its own triggers, actions, fields and plan requirements.
Can it create a shopping cart?	A connected commerce workflow can search products, check data, create or update a cart and issue a checkout link when supported.
Can it handle sensitive or regulated data?	Only after a separate privacy, security, contractual and regulatory review confirms the proposed workflow is appropriate.

Final partner takeaway

POSITION THE OUTCOME, SCOPE THE INTEGRATION

Inbox AI Pro can range from a turnkey AI receptionist and shared inbox to a deeply connected business workflow system. The sales opportunity is substantial, but every advanced integration should be translated into an exact trigger, data requirement, action, permission and failure path before it is promised or priced.

Document control

PARTNER USE ONLY

Audience: Nsite Sales Partners and Authorized Team Members.
Purpose: sales enablement, solution discovery and preliminary integration scoping. Version: June 2026.
Capabilities may change; confirm plan availability, geography, third-party policies and external API support before final client commitments.