



AUTOMATA
SYSTEMS

Welcome Guide

Your client portal · Automata Systems

INTELLIGENT SYSTEMS. REAL IMPACT.

Welcome to Automata Systems. Your AI assistant is now answering your inbound leads around the clock — and this portal is where you watch it work, approve its replies, and teach it how to sound like you.

You stay in control. Nothing sends automatically until you say so. Every reply your assistant drafts comes to you first for a one-tap approve, and every automated message is clearly identified as automated.

Signing in

- **URL:** <https://portal.automatasystems.ai>
- **Email:** the address we set up for you
- **Password:** the one-time password we sent — change it after your first login (top-right → **Change password**)

Tick **Keep me signed in** to skip the login next time. Forgotten your password? Use the **Forgot your password?** link on the sign-in screen.

First login — eight questions

The first time you sign in, you'll see a short setup form. These eight answers are literally what your assistant runs on, so be specific:

1. **What services do you offer?** *(required)*
2. **When are you open?** *(required)*
3. **What's your business phone number?** *(required)*
4. **What area do you serve?** *(required — towns, cities, or a radius)*
5. **How do people book with you?** *(optional — leave blank if you only take calls)*
6. **What do you charge?** *(required — quoted back to leads exactly as you write it; your assistant never invents a number)*
7. **Anything you definitely don't do?** *(required)*
8. **How should your assistant sound?** *(required — e.g. "warm and direct, never pushy")*

Hit **Finish setup** and you're in. You can change any of this later under **Teach your agent**.

Connect your calendar (auto-booking)

Want your assistant to actually **book** leads for you — not just hand them a link? Connect your Google Calendar and it will read your real availability, offer free times, and write the appointment on the one they pick. You stay in control: it never books until you've connected it, and it never invents a time.

Option 1 — just a booking link (instant). If you use Calendly, Google appointment slots, or a Google Meet link, paste that into the booking-link question above and you're done — your assistant drops the

link into replies and the lead books themselves.

Option 2 — full auto-booking (one-time setup, ~10 minutes). This needs a Google Cloud OAuth client, which *you* create (it's your calendar). Follow these steps once:

1. Go to <https://console.cloud.google.com>, sign in with the Google account that owns your calendar, and create a new **Project** (name it after your business).
2. **APIs & Services** → **Library** → search **Google Calendar API** → **Enable**.
3. **APIs & Services** → **OAuth consent screen** → **External** → fill in app name + your email → save through the scopes/test-users pages (skip them). Add your own email as a **Test user**.
4. **APIs & Services** → **Credentials** → **Create Credentials** → **OAuth client ID** → application type **Desktop app** → name it "Automata Calendar".
5. Copy the **Client ID** and paste it into the portal's **Connect your calendar** section — and send the **Client Secret** to Automata securely (it's delivered to us directly, never typed into the portal).
6. The portal shows you a link and a short code — open the link, sign in, paste the code, click **Allow**.
7. Done — it'll show "**Connected ✓**" and your assistant can start offering real appointment times.

You can revoke access anytime at <https://myaccount.google.com/security> → "Third-party apps with account access" → remove "Automata Calendar". Access ends immediately.

Note: this is Google Workspace only for now. If you're on Microsoft/Outlook, let us know — that's a separate setup we'll guide you through.

Connect your inbox (the one manual step)

Your assistant reads and replies from **your real inbox** — in your voice, from your address. That needs a Google **App Password**: a separate 16-character key (not your login password), the standard Google-recommended way to let a tool connect safely. It takes about 3 minutes, once:

1. Go to myaccount.google.com/security.
2. Turn on **2-Step Verification** if it isn't already (required).
3. Search for "**App passwords**" → open it.
4. Pick app "**Mail**" (or "Other" and name it "Automata"), then **Create**.
5. Copy the 16-character password and **send it to Automata** (we store it securely, never in this portal).

Once we have it, the **Mailbox** panel flips to "**Connected ✓**" automatically and your assistant is live.

The layout — where everything lives

The dashboard has a sidebar on the left and your content on the right:

Sidebar	What it's for
Overview	The full picture — stats, this month's numbers, approvals, activity, reports
Approvals	Replies waiting for your OK (the badge shows the count)
Teach your agent	Update what your assistant knows, in plain English
Activity	A running log of every lead and reply
Reports	Your monthly PDF summaries
Submit feedback	Report a bug or request a feature — it goes straight to us

At the bottom of the sidebar: **"Your agent is on duty"** — a live note confirming your assistant is running.

Four numbers at a glance

Across the top of the Overview you'll see four cards:

Card	Meaning
Awaiting review	Drafts that need your OK right now
Held / skipped	Drafts you set aside (you can restore them)
Auto-send	On/Off switch — see below
Rules taught	How many facts and rules your assistant follows

This month — your value, honestly

The **"This month"** panel tracks what actually happened:

- **Leads** — inbound leads this month
- **Replies** — how many were answered, split into auto-sent vs. ones you approved
- **Booked** — leads confirmed in the conversation
- **First reply** — median time to first reply
- **Time saved** — an estimate of hours you didn't spend on email

The "time saved" number is an **estimate** built from two assumptions you control — minutes per reply and your hourly rate. Click it anytime to adjust, so the number reflects reality.

Approving replies

When a lead comes in, your assistant drafts a reply and holds it for you. Each card in **Approvals** shows who wrote, when, the lead's message (click to expand), the **drafted reply**, and a **confidence** score. Then three choices:

- **Approve & send** — the reply goes out in your voice, from your address
- **Edit** — tweak the wording, then send
- **Skip** — don't send anything (the lead moves to "held"; you can restore it later)

Low confidence (under 80%) is flagged "needs your eyes" — read those extra carefully.

Teaching your agent (plain English)

Under **Teach your agent**, type a rule or fact the way you'd explain it to a new employee — for example: *"if they ask about snow removal, say we only do landscaping, not plowing."* Then hit **Add + teach**.

Your assistant sorts what you type into the right category (services, hours, pricing, rules) and shows it as labelled chips. Core facts — services, hours, tone, phone — can be edited but not accidentally deleted; everything else can be removed with the **X**.

Every change is reviewed by a human before it goes live. Teach freely — nothing reaches a customer unchecked.

Auto-send — when you're ready

By default, **Auto-send is Off** and stays off through your first week or two. Once you've approved a handful of clean replies and trust the assistant, flip the toggle on and it will send **high-confidence replies** automatically. You can turn it back off anytime.

Activity & reports

- **Activity** is the running log: lead captured → needs review → reply sent (you approved) → replies and follow-ups. Click any row to expand the full message.
- **Reports** lists your monthly PDF summaries — every lead handled, every reply sent, and the time saved. A new report arrives on the 1st of each month.

Account & help

- **Change password** (top-right) — pick a new one, 12+ characters

- **Log out** (top-right)
- **Submit feedback** (sidebar) — found a bug or have an idea? It goes straight to the team
- **Anything else?** Just reply to our emails or message us — we're here.

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