AI EMPLOYEE · BUILT AROUND YOUR BUSINESS

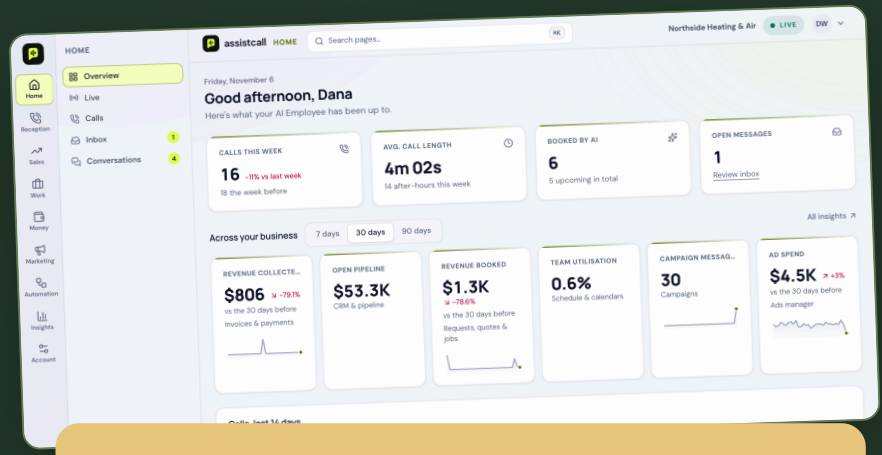
A useful first enquiry. A prepared next call.

An AI Employee that gathers the essentials and routes potential clients to your firm's next step.

Real product screens | Industry workflows | Setup & integrations

UK edition · GBP proposals
6 November 2026 · Version 1.0

SHARED ASSISTCALL WORKSPACE · FICTIONAL DEMO



Let the first call move the enquiry forward.

A short intake, a clear callback request and a useful record for the right person at your firm.

Screens show the product interface, not customer results. Enabled features and delivery scope are confirmed for each account.

01 · YOUR INDUSTRY

Ava fits the way your team works.

Ava follows your intake script. Your firm retains legal advice, conflict decisions, client acceptance and any time-critical legal action.

New conveyancing enquiry

A buyer asks whether the firm handles purchases. Ava checks the approved service area and records a callback request.

An existing client calls

Ava asks for the minimum detail needed to reach the correct team, without discussing confidential matter facts.

An urgent deadline is mentioned

Ava uses the firm's approved urgency rule and configured handoff. A solicitor decides what action is required.

01 **Identify**
New enquiry or existing client?

→

02 **Qualify**
Broad practice area and location.

→

03 **Capture**
Name, callback and preferred time.

→

04 **Route**
Approved team or consultation request.

→

05 **Review**
Firm checks conflicts and next steps.

Read this guide: examples → dashboard → daily workflow → integrations → guardrails → owner controls → setup. Every example uses fictional people and business details.

02 · A WORKED EXAMPLE

A short conversation. A clear next step.

Illustrative dialogue showing the intended workflow. Actual wording varies with the caller and your approved instructions.

CALLER
Do you help with buying a flat?

AVA
The firm handles residential purchases. Is the property in England or Wales?

CALLER
England. I would like someone to call me tomorrow.

AVA
Of course. What name and callback number should I pass to the conveyancing team?

CALLER
Jordan Patel. Tomorrow after 2pm is best.

AVA
I will pass on your request for a call after 2pm. The team will confirm when they can speak with you.

What the team needs to know

Name	Jordan Patel — fictional example
Enquiry	Residential purchase in England
Preferred callback	Tomorrow after 2pm, UK time
Routing	Conveyancing enquiries
Status	Callback requested; no engagement accepted

Initial intake example. Conflict checks, identity requirements and acceptance remain with the firm.

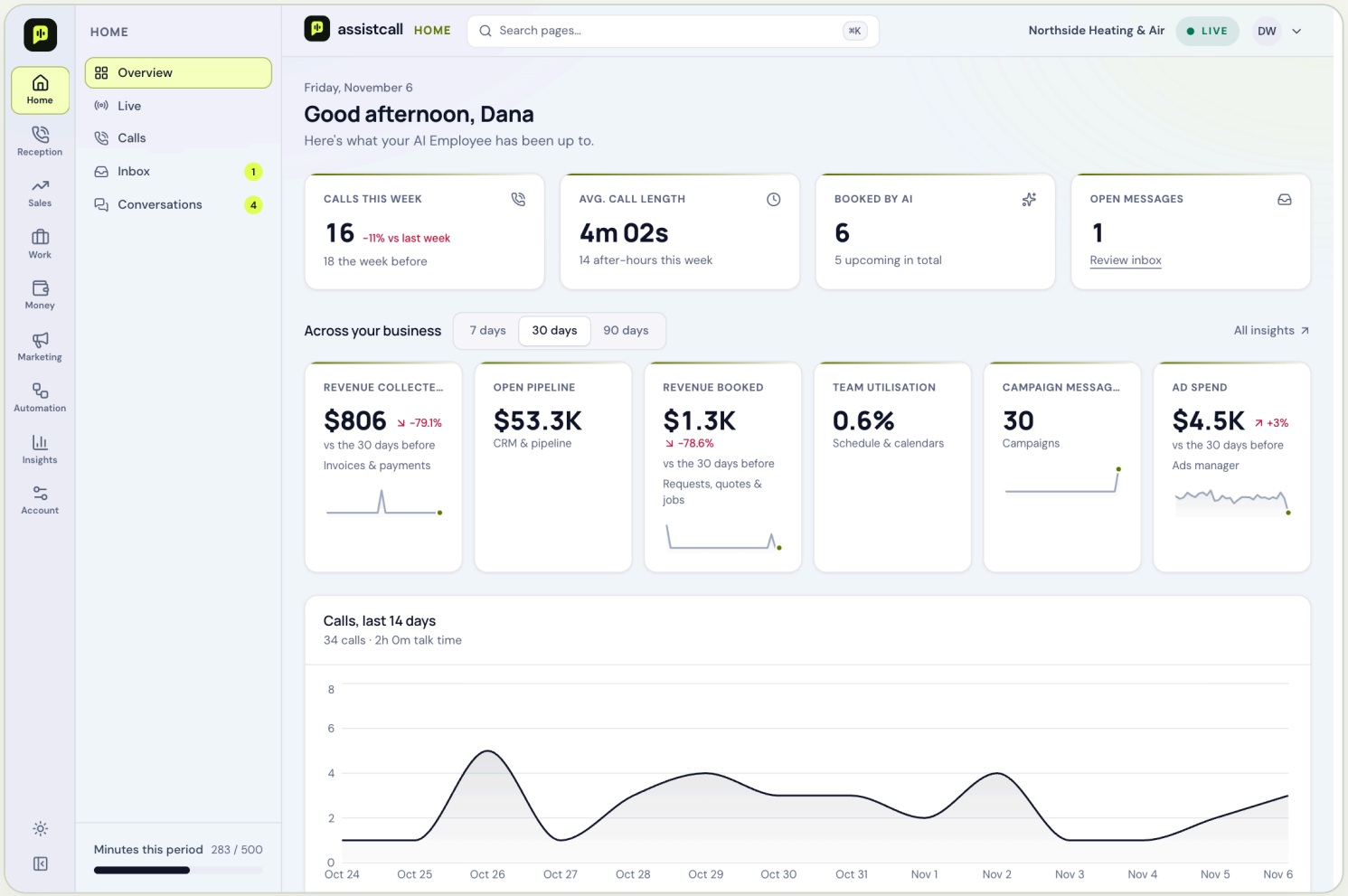
Dynamic, within your rules

Ava uses the caller's latest answer, asks for missing details and reads back important information. It does not need to repeat a rigid questionnaire when the caller has already supplied the answer.

03 · THE DASHBOARD

Give the team a view of incoming demand.

See call activity, bookings and messages in the shared AssistCall workspace. Screens use a fictional demo account.



Real AssistCall interface · fictional demo data. Optional modules and display currency vary by account. Screenshot values are not UK prices or performance claims.

1

After-hours enquiries

See what came in while the team was unavailable.

2

Clear next action

Separate a request from a confirmed consultation.

3

Firm oversight

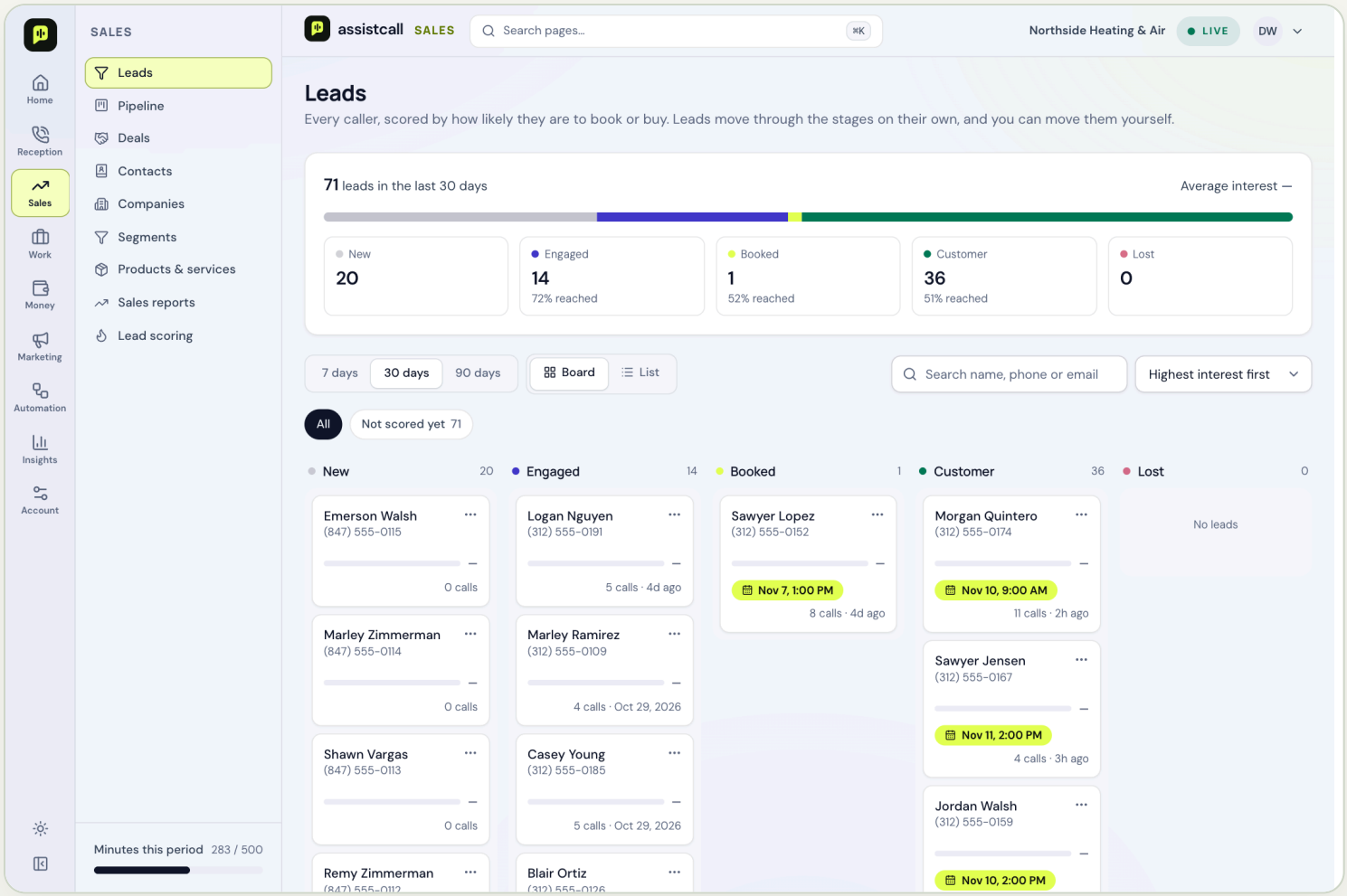
Review the actual enquiry before assigning a solicitor or accepting a matter.

The screen is the shared AssistCall interface; industry fields and modules are configured for the account.

04 · INFORMATION & FOLLOW-UP

Keep the enquiry and follow-up together.

A lead board helps staff see what needs a callback. The underlying legal decision stays with the firm.



Real AssistCall interface · fictional demo data. Optional modules and display currency vary by account. Screenshot values are not UK prices or performance claims.

1

Minimum intake

Capture the approved fields, such as practice area and preferred callback.

2

A visible stage

Move enquiries through the team's review and follow-up process.

3

No automatic acceptance

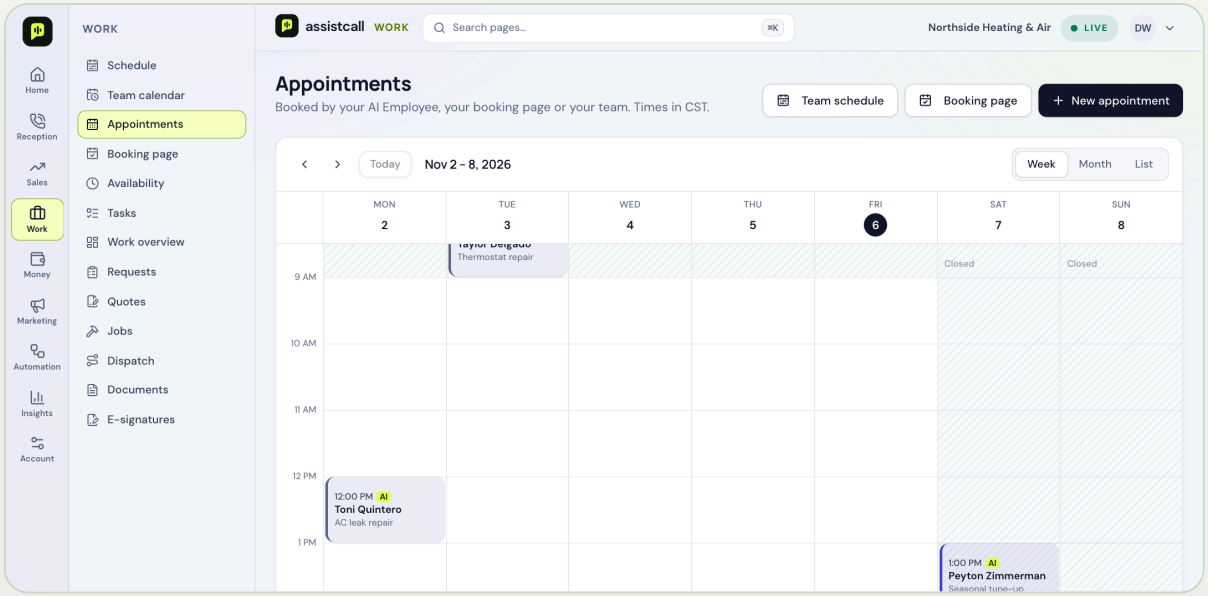
A new lead or CRM record does not mean the firm has accepted a client.

Screens use a fictional service business to demonstrate the shared interface.

05 · BOOKINGS & REQUESTS

Consultation requested—or confirmed.

Keep those two outcomes distinct. A calendar connection and your firm's rules determine which Ava can offer.



Real AssistCall interface · fictional demo data. Optional modules and display currency vary by account. Screenshot values are not UK prices or performance claims.

A Clio or Microsoft 365 calendar workflow requires the account permissions and a tested connection. Do not assume a generic calendar booking creates or updates a legal matter.

1 Check the policy

Which practice areas, meeting types and staff can receive a consultation?

2 Check availability

Use the configured calendar and agreed duration, buffers and UK time zone.

3 Confirm the result

Say it is booked only after the booking succeeds. Otherwise save the requested time.

4 Let the firm review

Conflicts, fees, engagement terms and acceptance are still handled by the firm.

06 · MESSAGES & HUMAN HANDOFF

Urgent enquiries reach a person with context.

The caller should know what happened—and what still needs a person.

1 · Recognise the next step

Use your firm's approved triggers: an imminent deadline, a caller asking for their solicitor, or another priority your team defines. Attempt only configured destinations. Do not interpret legal urgency or guarantee a response time.

2 · Send the right link

With messaging enabled and permission to text, send an approved consultation or contact link. Read back a different mobile number before using it; keep sensitive matter details out of the message.

3 · Handle no answer

If nobody answers, record the approved minimal callback request and notify the designated team. Tell the caller the transfer did not connect; do not say a solicitor is dealing with it.

01
Confirm
Read back the important details.

→

02
Attempt
Use an approved action or destination.

→

03
Check
Wait for the actual result.

→

04
Explain
Say what completed and what did not.

A different number for the text?

Ask which number should receive this specific message. Read it back digit by digit, confirm permission and use that destination in the enabled messaging workflow. A new text number does not automatically replace the person's primary number.

A voice number is not automatically an SMS number

UK texts need a supported sender, an enabled workflow and appropriate permission. If texting is unavailable or fails, explain that and offer the approved alternative. Do not say a message was delivered without a result.

07 · YOUR SYSTEMS

Connect the workflow you already use.

Keep the firm's chosen system of record. Map a limited enquiry workflow first, then test it with fictional data.

assistcall

Your AI Employee
Approved facts · actions · call record

Authorised connection

↔

or approved link / staff handoff

Clio
Scoped enquiry / contact workflow

Microsoft 365
Authorised calendar connection

HubSpot
Marketing enquiry follow-up

Google Calendar
Approved consultation calendar

SYSTEM / ROUTE	SCOPE	WHAT MUST BE AGREED
Clio Manage	Custom connection review	Confirm OAuth permission, record type and fields. Client and matter creation need explicit firm approval.
Microsoft / Google calendar	Configured connection	Select the calendar, permission, appointment type and result to write back.
HubSpot	Scoped automation	An approved adapter, Zapier or Make workflow can map a non-confidential enquiry.

Official references: Clio Manage · Authorisation · Microsoft Graph · Create event · HubSpot · Contacts API

Example systems, not a list of installed connectors. Account access, permissions, commercial terms and successful testing determine what can be connected. Vendor marks remain the property of their owners.

08 · CUSTOM CONFIGURATION

Example: a conveyancing enquiry to the team.

Proposed field mapping for an authorised CRM or case-management adapter. The exact object and permissions are agreed before setup.

FROM THE CONVERSATION	DESTINATION	RULE
Name + confirmed callback	Enquiry / contact	Match carefully; flag uncertain matches for staff.
Broad practice area	Enquiry category	Use the firm's own allowed categories.
Preferred callback time	Follow-up task	Preserve Europe/London time and the requested date.
Short approved summary	Enquiry note	Exclude unnecessary confidential matter detail.
Call reference + result	Activity record	Link the source call; avoid duplicate writes.

If a lookup or write fails: keep the result unconfirmed, preserve the appropriate AssistCall record and flag the item for staff review. A custom connection is accepted only after its failure path is tested.

A focused first scope

- One practice area and approved intake script.
- One enquiry destination and named team.
- One consultation or callback flow after access is ready.

24-hour setup service
The 24-hour setup service applies to an agreed, supported configuration or integration after the complete brief, approved content, working credentials and permissions are available. Your proposal confirms eligibility and timing. Carrier verification, vendor approval, restricted APIs and larger builds are scheduled separately.

Acceptance checks

- A normal request produces the correct result.
- Missing or corrected data is handled clearly.
- A repeated event does not create duplicates.
- Denied access and failed writes reach the fallback.

09 · GUARDRAILS & LANGUAGES

Flexible conversation. Clear boundaries.

Your business chooses the facts, permitted actions and moments that need a person.

Ava should

- Ask one intake question at a time.
- Collect only the fields the firm approves.
- Keep deadline interpretation with qualified staff.
- Confirm callback details before saving a request.

Ava must not

- Provide legal advice or calculate legal deadlines.
- Decide conflicts or accept an engagement.
- Expose an existing client's matter to an unverified caller.
- Promise a solicitor is available when no one has accepted.

Speak in the caller's language

A caller starts in Spanish. Ava can gather the same limited enquiry details in Spanish, then leave an English internal note for the team.

Examples of supported conversations include English, Spanish, French, Arabic, Bangla and Mandarin. Test the languages, names and dialects your customers use before launch.

Adapt without changing your policy

Ava can use the caller's responses, approved business knowledge and available authorised context. It asks when information is unclear. It does not independently rewrite your prices, policies or access rules.

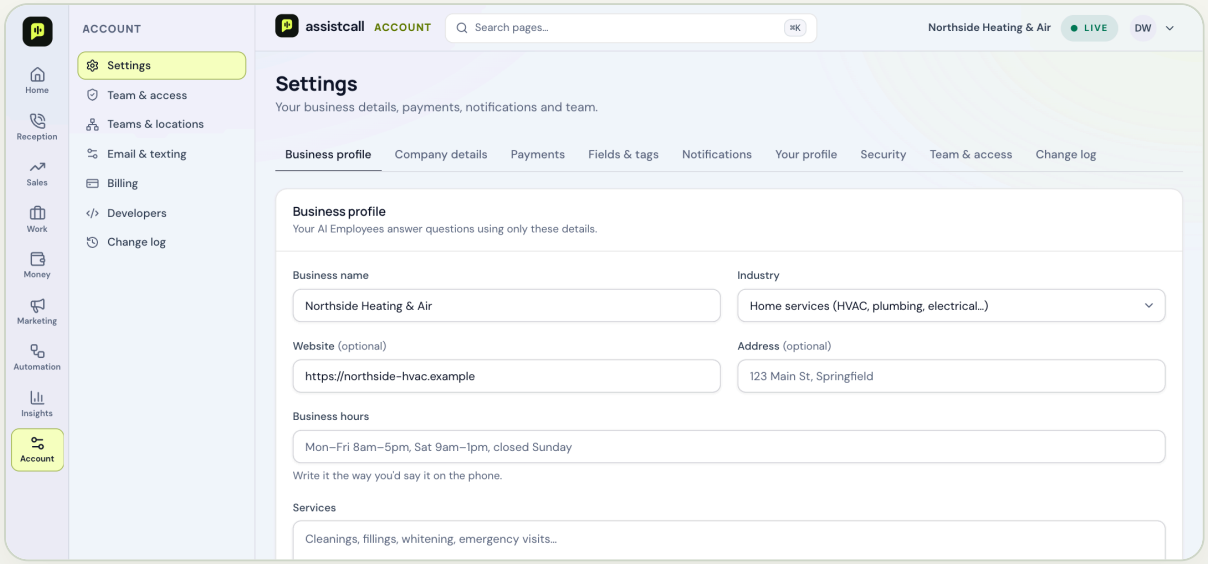
Internal notes are generally stored in English. Confirm the language and wording of any customer-facing message separately.

Urgent business routing is not an emergency service. Follow the approved local emergency instructions when there is immediate danger. Never promise a successful transfer, dispatch or professional response before it is accepted.

OWNER CONTROL

Make changes without a support ticket.

Use the dashboard for direct control. On supported owner-support routes, you can also tell Ava what to update.



Real Settings → Business profile screen, with fictional demo details. Review the "Update AI Employees' instructions" option before saving: it can replace custom instructions.

1 Open the correct section

Settings → Business profile for hours and services. Packages & knowledge for FAQs, packages and policies.

2 Make and save the change

Use exact facts. Review whether instructions should be regenerated, then save and run a test call.

3 Or speak to Ava

Use the AssistCall owner-support route supplied for your account and call from your verified owner number. Complete any requested verification. UK phone access is confirmed at activation; the dashboard remains the direct self-service route.

Owner says

"Ava, update our initial enquiry instructions: ask which practice area they need, then offer a callback."

Ava reads it back

"I will ask for the practice area and offer a callback. Shall I save that instruction?"

You confirm before the change is saved.

GET STARTED

A simple setup. A testable result.

Self-service covers everyday business settings. A custom setup maps your particular workflow and systems.

1 Tell us how the business works

Open the UK product site and send your setup enquiry. Your scope and GBP proposal are confirmed before activation.

2 Complete the account setup

Verify the owner, review the business profile and add approved knowledge. Number activation may require carrier checks.

3 Choose the actions

Select booking, messages, handoff and any supported connection. Give Ava only the actions needed for this workflow.

4 Test, then route calls

Test normal calls, unknown answers, alternate numbers and no-answer handoffs. Forward or route calls after acceptance.

Bring these four things

- Practice areas and locations you actually cover.
- Approved initial questions and topics to avoid.
- Consultation policy, calendar and handoff destinations.
- The team responsible for reviewing each enquiry.

Keep control after launch

Review early calls, update approved knowledge and check failed or incomplete actions. Use team permissions for who can view or change the account.

CUSTOM SETUP & SUPPORTED INTEGRATIONS

Your agreed workflow, targeted for 24 hours.

The 24-hour setup service applies to an agreed, supported configuration or integration after the complete brief, approved content, working credentials and permissions are available. Your proposal confirms eligibility and timing. Carrier verification, vendor approval, restricted APIs and larger builds are scheduled separately.

NEXT STEPS & RESEARCH

A clear scope before you connect anything.

Choose the outcome first. We will map the account, the system access and the tests needed to make it reliable.

Your UK proposal

Pricing is quoted in GBP for your agreed package. The written proposal should identify the recurring plan, included usage, any setup work, overages, messaging, third-party fees and VAT treatment.

No fixed UK tariff is implied by demo dashboard values. Optional CRM, scheduling, messaging and operations modules depend on your account.

What this guide shows

Screens are captured from the real AssistCall interface using fictional local demo data. Dialogues, records and field mappings are illustrative examples, not customer testimonials or completed vendor integrations.

Vendor logos identify example systems. They do not imply partnership, endorsement or a native connector.

Research & implementation references · checked 6 November 2026

Clio Manage · Authorisation ↗

Clio uses account-authorised OAuth access; scope the records and actions before connection.

docs.developers.clio.com

SRA · Confidentiality of client information ↗

Keep initial enquiries minimal; confidential matter handling and conflict review remain with the firm.

www.sra.org.uk

Microsoft Graph · Create event ↗

Event creation requires calendar permissions; invitations and time zones must be tested.

learn.microsoft.com

HubSpot · Contacts API ↗

Contact records and associations; an authorised connection and agreed field mapping are required.

developers.hubspot.com

Show us one real workflow.

Tell us the call, the system and the result you need. We will confirm scope, access and a GBP proposal.

Explore Solicitors ↗