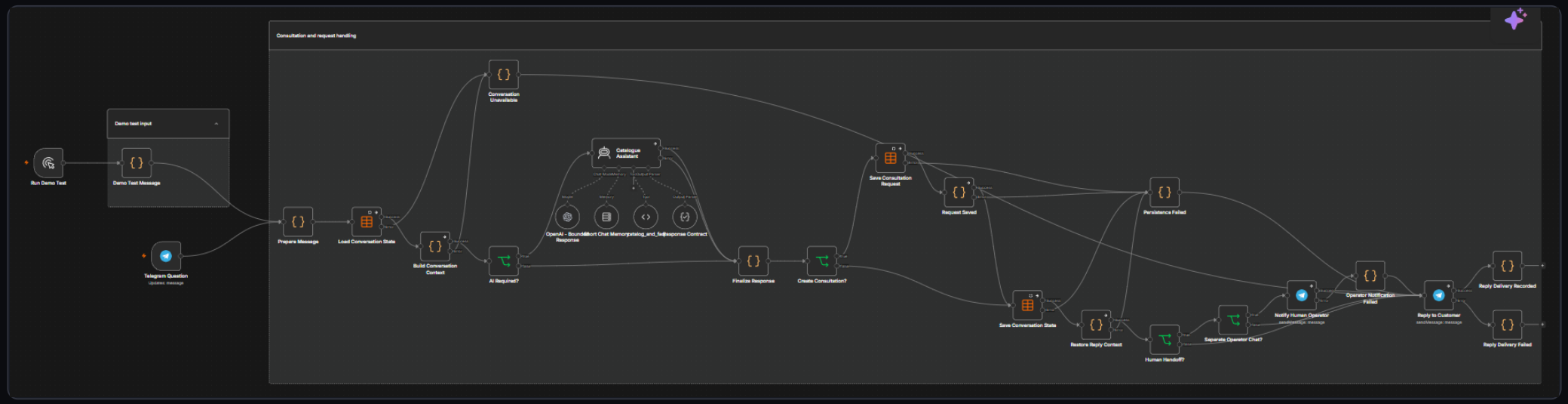
AI Sales Assistant

Help a customer move from an unclear automation need to a structured consultation request. Keep the conversation connected, then save a brief with their consent.



AI and conversation context

Catalogue Assistant

OpenAI API
Catalogue / FAQ tool
10-turn memory

Consultation storage

Save request

Data Table upsert

↓

Confirm saved

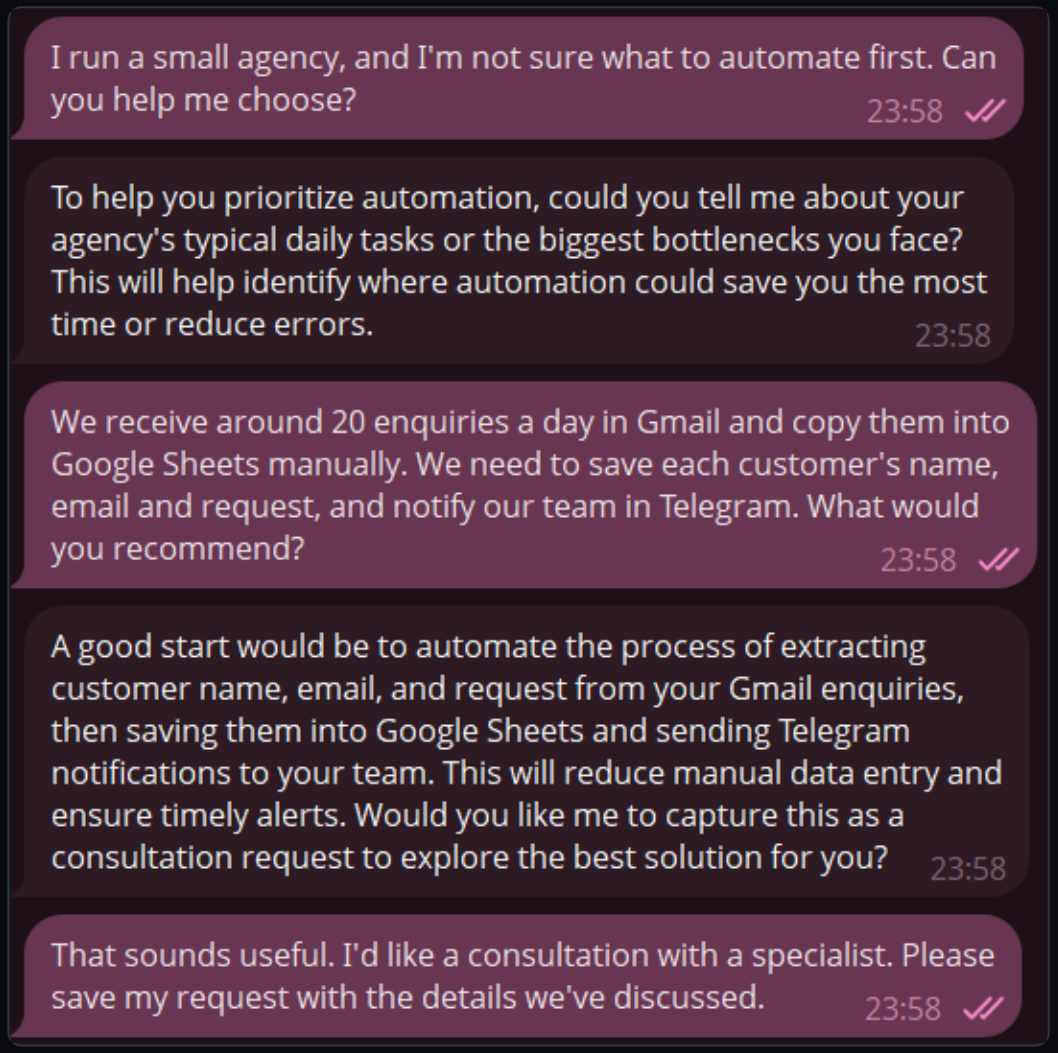
Reply from saved brief

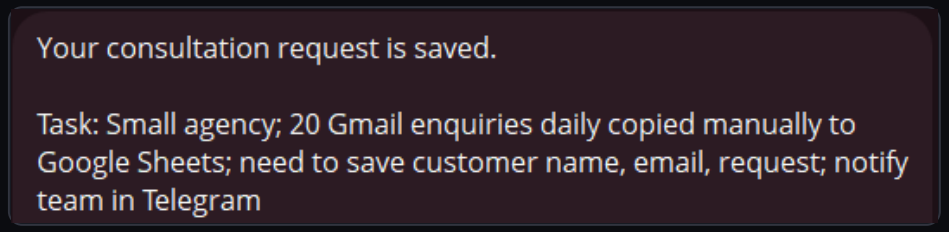
From dialogue to a useful brief

Message context, AI guidance, explicit consent and saved request data work as one flow.

Understand the need before creating the request.

The customer describes daily work, gets a relevant direction and agrees to save the details. The resulting brief preserves the context for the next conversation.





A focused discovery conversation

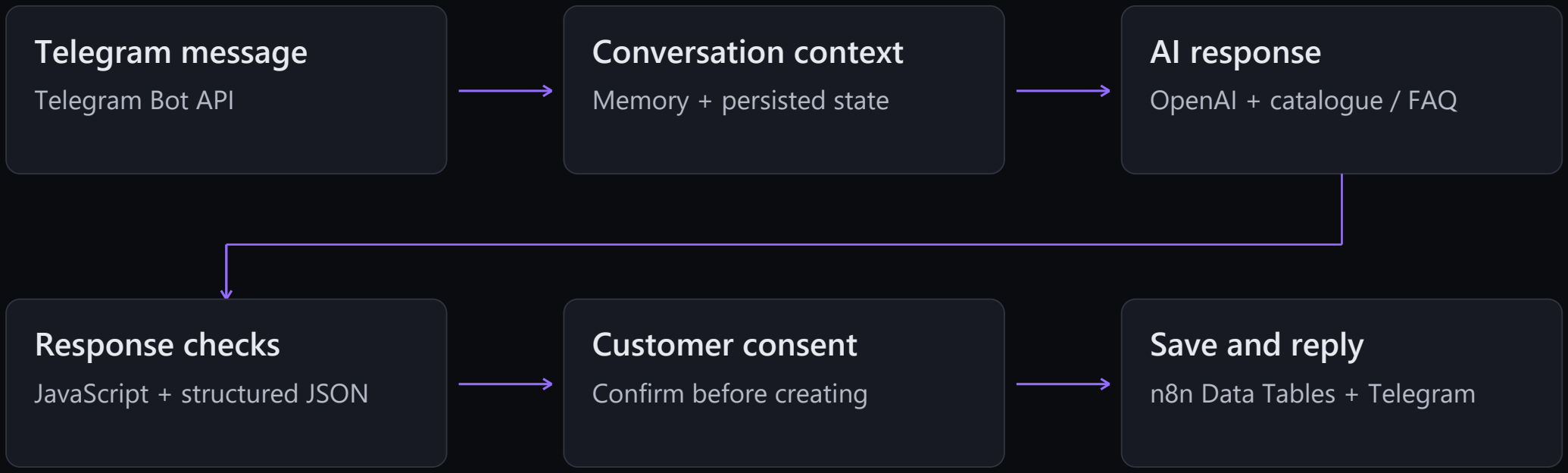
Ask about the business, repeated tasks and the current tools. Use earlier answers instead of restarting the same questions.

A brief the customer can recognise

Capture the task, volume and systems discussed. This example saves a consultation request; appointment scheduling is a separate step.

AI guidance. Controlled business actions.

An n8n AI Agent connects the OpenAI API, a catalogue / FAQ tool and a 10-turn memory window. JavaScript checks structured output before the flow takes action.



Carry the context forward

Conversation state and request data are stored separately. The next turn can use the brief already discussed.

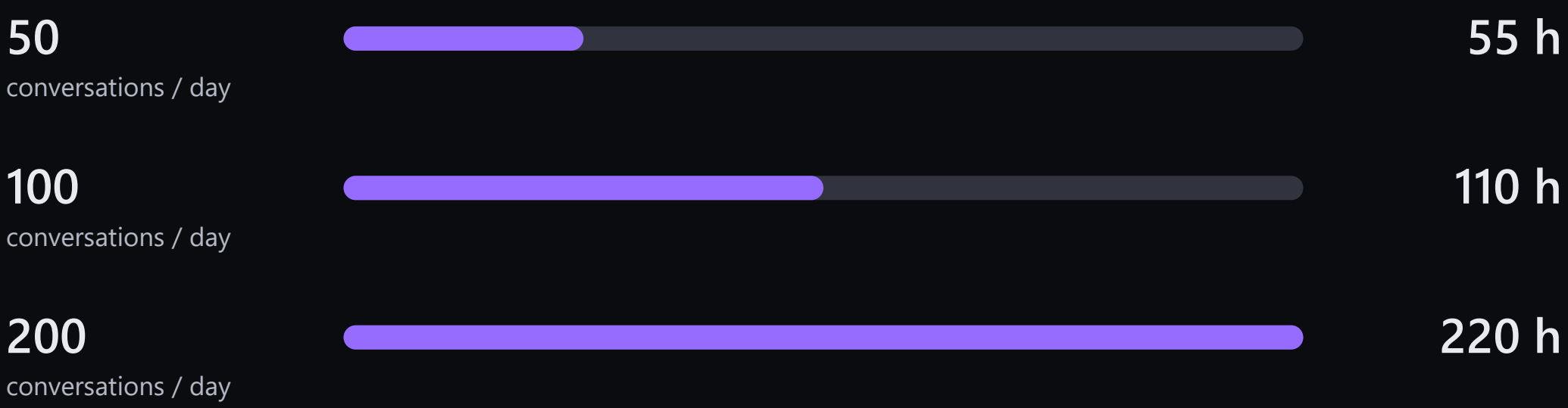
Reliable request capture

Storage errors lead to a clear fallback. After a successful save, the customer receives the captured brief and confirmation.

More context. Less repetitive discovery.

Use the assistant for initial questions and brief preparation, so a specialist can begin with the customer's situation already organised.

Estimated time saved per month



3 minutes less initial admin

Approximate saving per conversation across 22 working days: repeated questions, note-taking and preparing the consultation brief.

A better starting point for service

The specialist keeps the judgement and consultation. The assistant helps collect context and record the customer's next step.