

BOOK 1

Practical. Simple. Powerful.

# AI AUTOMATION STARTER KIT

Roman Urdu Beginner Practical Guide to Prompts,  
Simple Workflows, Lead Capture, Email Automation,  
aur Basic Chatbots

## Shuru Karne Walon Ke Liye

Students - Freelancers - Small Business  
Owners  
Teams & Professionals



## Seekho. Banao. Automate Karo.

- Coding zaroori nahin
- Hands-on projects
- Real business examples
- Step-by-step exercises
- Answers included

**Hamza Ali Khalid**

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# AI AUTOMATION STARTER KIT

Roman Urdu Beginner Practical Guide to Prompts, Simple Workflows, Lead Capture, Email Automation, aur Basic Chatbots

## Book ka simple learning flow



**Hamza Ali Khalid**

hamzaig.com

Practical AI automation learning series

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## AI Automation Starter Kit - Book 1: Beginner Level

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### Disclaimer

AI tools, APIs, workflows, aur platforms time ke saath change hote rehte hain. Examples, prompts, aur ideas learning purpose ke liye diye gaye hain. Real client ya business use se pehle hamesha test, review, aur validation zaroor karein.

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## DEDICATION

# Un logon ke naam

*Jo AI ko sirf trend nahin, balkay apni skill, income, aur future growth ka practical tool banana chahte hain.*

Yeh book un beginners ke liye hai jo coding, freelancing, business automation, aur AI tools ko step-by-step practical tareeqe se seekhna chahte hain.

# About the Author



**HK**

## Hamza Ali Khalid

**Software Engineer - AI Automation Learner & Builder**

Hamza Ali Khalid backend development, automation systems, APIs, chatbots, aur AI-based software solutions par kaam karte hain. Unka focus practical learning aur real-world implementation par hai, taake readers sirf concepts na samjhein, balkay unhein business aur freelancing scenarios mein use bhi kar saken.

### **Practical**

Har concept ke saath exercises aur examples.

### **Beginner Friendly**

Simple language, clear steps, aur easy flow.

### **Business Focused**

Jo seekhein usay real-world use cases mein apply karein.

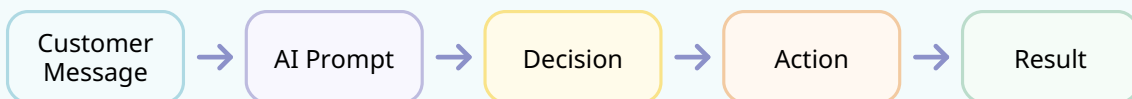
# About This Book

Aaj ke time mein AI aur ChatGPT sirf casual use ke tools nahin rahe. Real value tab create hoti hai jab in tools ko business workflows ke saath connect kiya jaye.

Is book ka focus aapko AI Automation ko practical nazariye se samjhana hai. Yahan aap prompts, simple workflows, lead capture, email automation, aur basic chatbot ideas ko step-by-step seekhein ge.

Maqsad yeh hai ke aap AI ko sirf sawal jawab ke liye nahin, balkay real kaam automate karne ke liye use karna seekhein.

## AI Automation ka basic flow



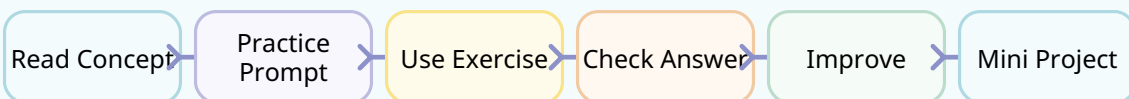
## Book ka promise

Is book se aap simple AI automation ideas ko business use cases, prompts, aur practical exercises ke zariye samajh sakein ge.

# How to Use This Book

Is book ko sirf read karne wali book na samjhein. Isay workbook ki tarah use karein. Har chapter mein pehle short concept hoga, phir practical examples, exercises, aur unke answer keys.

## Recommended learning method



## Kya karna hai

- Har prompt khud likhne ki koshish karein
- Concept samajhne ke baad exercise solve karein
- Apne results ko answer key ke saath compare karein
- Choti choti automations ka plan banana shuru karein

## Kya avoid karna hai

- Sirf copy-paste learning
- Bina test kiye prompts use karna
- Har cheez ko advanced level tak le jana
- Ek hi din mein sab kuch seekhne ki koshish

# Aap Kya Seekhein Ge

Book 1 ke chapters is tarah design kiye gaye hain ke aap concepts ke saath saath practical beginner-level AI automation planning bhi seekh sakein.

01

## AI Automation Foundation

AI kya hoti hai, automation mindset, aur beginner tools overview.

02

## Prompt Engineering

Better prompts likhna, structure samajhna, aur useful output lena.

03

## Message Classification

Intents, priority, categories, aur customer messages ko samajhna.

04

## Data Extraction

Name, phone, service, budget, aur important details extract karna.

05

## Beginner Projects

Mini projects, exercises, answer keys, aur first practical systems.

06

## Selling Beginner Services

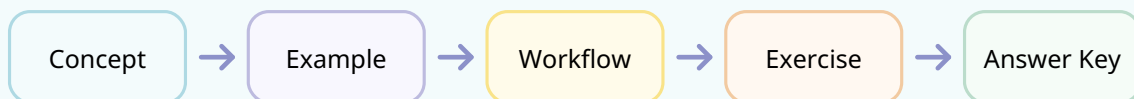
Simple offers, service ideas, aur first client use cases.



# Book Structure

Har chapter ki structure consistent rakhi gayi hai taake reader ko har topic ko samajhne aur apply karne mein asani ho. Theory short hogi, practical work zyada hoga.

## Har chapter ka practical pattern



Is format ki wajah se har topic ko step-by-step samajhna, khud try karna, aur phir solution dekh kar improve karna asaan ho jata hai.

**Target ratio:** 10% simple concept + 90% practical examples, prompts, workflows, exercises, and answers.

# Table of Contents

Neechay Book 1 ka beginner-friendly roadmap diya gaya hai. Full chapters mein exercises, answer keys, prompts, diagrams, aur mini projects include honge.

## Section 1: AI Automation Foundation

- Chapter 1: AI Automation Kya Hai?
- Chapter 2: AI Automation Mindset
- Chapter 3: Beginner Tools Overview

## Section 2: Prompt Engineering for Automation

- Chapter 4: Prompt Engineering Basics
- Chapter 5: Customer Message Classification
- Chapter 6: Data Extraction with AI
- Chapter 7: Structured Output aur JSON

## Section 3: Simple Business Automations

- Chapter 8: Lead Capture Automation
- Chapter 9: AI Email Assistant
- Chapter 10: Basic Customer Support Assistant
- Chapter 11: Basic WhatsApp Automation Planning

# Table of Contents Continued

## Section 4: Beginner Projects

Chapter 12: Project 1 - AI Prompt Library

Chapter 13: Project 2 - Lead Capture Assistant

Chapter 14: Project 3 - Mini Customer Support Bot

Chapter 15: Project 4 - Email Reply Assistant

## Section 5: Selling Beginner AI Automation Services

Chapter 16: AI Automation as a Service

Chapter 17: Final Capstone Project

## Bonus Material

Prompt Templates

Workflow Checklists

Client Discovery Questions

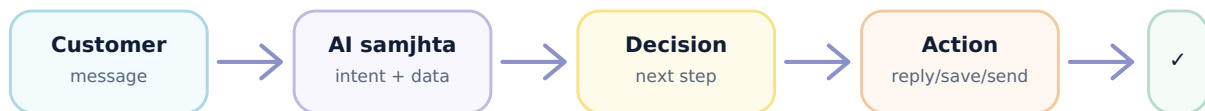
Exercise Answer Keys

**Note:** Chapter pages final manuscript complete hone ke baad update honge. Abhi yeh preliminary pages A4 print-ready format mein design kiye gaye hain.

# AI Automation Kya Hai?

Is chapter mein aap AI Automation ka basic concept, business value, practical examples, aur beginner workflow samjhein ge.

## Chapter 1 ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- AI Automation ko simple language mein explain karna.
- Traditional automation aur AI automation mein difference samajhna.
- Customer message se intent, action, aur response identify karna.
- Beginner level ka basic automation workflow design karna.

## 1.1 Simple Definition

---

**AI Automation** ka matlab hai AI ko business tools, forms, emails, chats, APIs, spreadsheets, ya databases ke saath connect karke repetitive kaam automatically karwana.

Simple words mein, AI Automation ek aisa system hota hai jo user ka message samajhta hai, important information extract karta hai, decision leta hai, aur phir koi action perform karta hai. Action simple bhi ho sakta hai, jaise reply draft karna, ya practical bhi ho sakta hai, jaise Google Sheet mein lead save karna.

**Short definition:** AI Automation ka goal yeh hai ke AI sirf jawab na de, balkay real business kaam ko step-by-step complete karne mein help kare.

### Beginner example

Ek customer WhatsApp par message karta hai:

```
AC service ka rate kya hai?
```

AI Automation system is message se yeh samajh sakta hai:

```
{
  "intent": "price_inquiry",
  "service": "AC service",
  "next_action": "send_price_or_ask_area",
  "lead_status": "new"
}
```

Phir system customer ko reply de sakta hai:

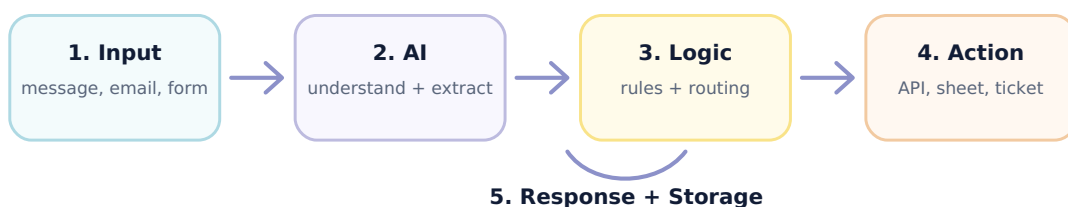
```
Ji, AC service ke rates area aur service type ke hisaab se vary karte hain. Please
apna area share kar dein taake hum accurate price bata saken.
```

## 1.2 AI Automation Sirf ChatGPT Use Karna Nahi Hai

Beginners aksar samajhte hain ke AI Automation ka matlab sirf ChatGPT se answer lena hai. Yeh incomplete understanding hai. ChatGPT ya koi bhi AI model automation ka sirf ek part hota hai.

Complete automation mein usually yeh cheezen hoti hain:

**Diagram 1.1 - AI Automation ke 5 parts**



Yahan important point yeh hai ke AI sirf text generate nahi kar raha. AI workflow ka **understanding aur decision-making** part ban raha hai.

## 1.3 Traditional Automation vs AI Automation

Traditional automation fixed rules par chalti hai. AI Automation flexible hoti hai kyun ke AI natural language samajh sakta hai.

| Traditional Automation                            | AI Automation                                                                               |
|---------------------------------------------------|---------------------------------------------------------------------------------------------|
| Fixed rules follow karti hai.                     | User ka message samajh kar decision leti hai.                                               |
| Example: form submit ho to email send karo.       | Example: message read karo, intent samjho, data extract karo, reply generate karo.          |
| Language variation handle karna mushkil hota hai. | Different wording aur casual messages ko samajh sakti hai.                                  |
| Human-like text generate nahi karti.              | Context ke hisaab se polite aur useful reply bana sakti hai.                                |
| Simple repetitive tasks ke liye best.             | Customer support, lead handling, content, documents, aur decision workflows ke liye useful. |

**Important:** Har jagah AI ki zaroorat nahi hoti. Agar task simple rule se solve ho raha hai, to traditional automation enough ho sakti hai. AI tab useful hoti hai jab text understanding, classification, extraction, ya flexible reply ki zaroorat ho.

## 1.4 AI Automation Ka Business Value

AI Automation ka real value tab samajh aata hai jab hum isay business problems ke saath connect karte hain. Businesses ko usually in problems ka samna hota hai:

- Customer messages late reply hote hain.
- Leads manually note hoti hain aur miss ho jati hain.
- Emails ka jawab dene mein time lagta hai.
- Staff repetitive questions mein busy rehta hai.
- Complaint details properly collect nahi hoti.
- Reports aur summaries manually banani parti hain.

AI Automation in problems ko reduce kar sakti hai. Iska purpose human ko replace karna nahi, balkay human ko repetitive kaam se free karna hai.

### Fast Response

Customer ko instant reply milta hai.  
Business ka first impression improve hota hai.

### Less Manual Work

Staff same questions ke jawab baar baar dene ke bajaye important work par focus kar sakta hai.

### Better Lead Capture

AI lead ka naam, phone, service, budget, aur urgency extract karke proper format mein save kar sakti hai.

### Better Customer Experience

Customer ko clear, polite, aur useful response milta hai, chahe team immediately available na ho.

## 1.5 Real-World Beginner Examples

---

Ab kuch simple examples dekhte hain jo beginner level par samajhna easy hain.

### Example 1 - Restaurant Order Bot

Customer message:

Menu bhej dein

AI intent:

```
{  
  "intent": "menu_request",  
  "next_action": "send_menu"  
}
```

Possible reply:



Ji, yeh hamara menu hai. Aap burger, pizza, fries, aur drinks mein se order kar sakte hain. Order place karne ke liye item name aur quantity share kar dein.

## Example 2 - E-commerce Support Bot

Customer message:

Mera order abhi tak deliver nahi hua

AI intent:

```
{
  "intent": "order_status",
  "issue": "delivery_delay",
  "required_info": "order_id",
  "priority": "medium"
}
```

Possible reply:

Sorry for the delay. Please apna order number share kar dein taake hum delivery status check kar saken.

## Example 3 - Clinic Appointment Assistant

Customer message:

Kal evening dentist appointment mil sakti hai?

AI extraction:

```
{
  "intent": "appointment_booking",
  "service": "dentist",
  "preferred_day": "tomorrow",
  "preferred_time": "evening",
  "next_action": "collect_name_and_phone"
}
```

## Example 4 - Real Estate Lead Qualification

Customer message:

DHA Lahore mein 5 marla house chahiye, budget 2 crore tak hai

AI output:

```
{
  "intent": "property_inquiry",
  "location": "DHA Lahore",
  "property_type": "house",
  "size": "5 marla",
  "budget": "2 crore",
  "lead_quality": "high"
}
```

## Example 5 - Complaint Ticket Automation

Customer message:

Payment deduct ho gayi lekin order confirm nahi hua

AI output:

```
{
  "intent": "complaint",
  "category": "payment_issue",
  "priority": "high",
  "summary": "Customer payment was deducted but order was not confirmed",
  "needs_human": true
}
```

## 1.6 AI Automation Ke Core Building Blocks

Beginner ke liye AI Automation ko 5 simple blocks mein samajhna best hai.

## 1. Input

Input wo cheez hai jo automation ko start karti hai. Example: WhatsApp message, website form, email, Google Sheet row, ya support ticket.

## 2. AI Understanding

AI input ko read karti hai. Is step mein AI intent, category, mood, priority, aur required information samajh sakti hai.

## 3. Decision Logic

System decide karta hai ke next step kya hona chahiye. Example: price inquiry hai to pricing reply, complaint hai to ticket, order status hai to order ID ask.

## 4. Action

Action real kaam hota hai. Example: reply send karna, Google Sheet update karna, CRM lead create karna, ya email draft banana.

## 5. Storage and Follow-up

Useful data save karna important hota hai. Agar data save nahi hota, automation sirf reply system ban kar reh jati hai.

# 1.7 AI Kya Kar Sakti Hai Aur Kya Nahi?

AI powerful hai, lekin perfect nahi. Beginner ko AI ki strength aur limitations dono samajhni chahiye.

| AI kar sakti hai                                | AI ke liye caution zaroori hai                                   |
|-------------------------------------------------|------------------------------------------------------------------|
| Customer message ka intent detect karna.        | Har jawab 100% accurate ho yeh guarantee nahi hoti.              |
| Data extract karna, jaise name, phone, service. | Missing information ke case mein AI ko guess nahi karna chahiye. |
| Polite reply draft karna.                       | Business policy aur pricing verify karna zaroori hai.            |
| Email ya complaint summary banana.              | Sensitive data ko securely handle karna zaroori hai.             |
| Tasks ko classify karna.                        | Important decisions mein human review useful hota hai.           |

**Rule:** Beginner automation mein AI ko final authority na banayein. AI ko assistant banayein jo data prepare kare, reply draft kare, aur simple decisions mein help kare.

## 1.8 Beginner Mental Model

Jab bhi aap koi automation design karein, yeh 5 questions poochhein:

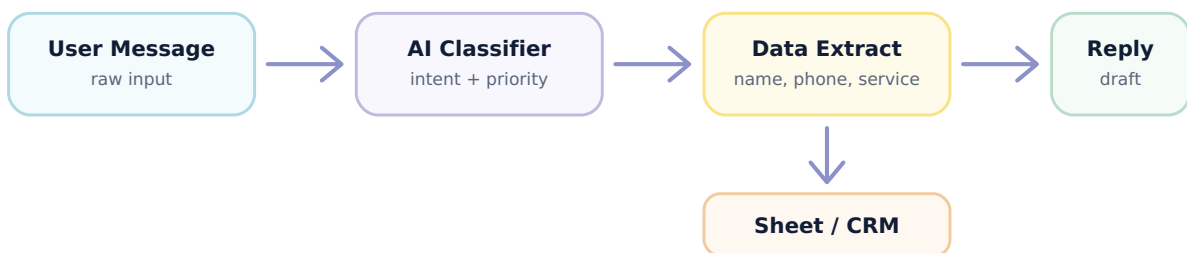
1. Input kahan se aa raha hai?
2. AI ko is input se kya samajhna hai?
3. Kaunsa data extract karna hai?
4. System ko next action kya lena hai?
5. Result customer ya business owner tak kaise pohanchana hai?

Agar aap in 5 questions ka clear jawab de sakte hain, to aap automation ka basic workflow design kar sakte hain.

## 1.9 Mini Practical Project - Customer Message to Automation Plan

Is mini project mein hum customer message ko AI Automation plan mein convert karein ge.

**Diagram 1.2 - Beginner project workflow**



### Scenario

Aap ek AC repair business ke liye simple automation plan bana rahe hain. Customer WhatsApp par message karta hai:

Bhai mera AC cooling nahi kar raha. Technician kab bhej sakte ho?

### Step 1 - Intent identify karein

```
{
  "intent": "service_request",
  "service": "AC repair",
  "problem": "AC cooling issue"
}
```

### Step 2 - Missing information identify karein

```
{
  "missing_information": ["customer_name", "phone_number", "area", "preferred_time"]
}
```

## Step 3 - Reply generate karein

Ji, hum technician arrange kar sakte hain. Please apna naam, area, aur preferred time share kar dein taake hum availability check kar saken.

## Step 4 - Sheet-ready output

```
{  
  "lead_type": "service_request",  
  "service": "AC repair",  
  "problem": "Cooling issue",  
  "status": "waiting_for_details",  
  "priority": "medium",  
  "reply_sent": true  
}
```

## 1.10 Practice Exercises

---

Exercises solve karne se pehle answer key na dekhein. Pehle khud try karein, phir solution ke saath compare karein.

### Exercise 1 - Automatable Task Identify Karein

Neechay tasks mein se kaun se tasks AI Automation ke liye suitable hain?

1. Customer se order number mangna.
2. Customer ka mood classify karna.
3. Company ke bank account se payment transfer approve karna.
4. Lead ka naam, phone, aur service extract karna.
5. Complaint summary banana.

### Exercise 2 - Intent Classification

In messages ka intent identify karein:

1. Price kya hai?
2. Mera order abhi tak nahi aya.
3. Mujhe refund chahiye.
4. Kal appointment mil sakti hai?
5. Menu share kar dein.

### Exercise 3 - Data Extraction

Is message se useful data extract karein:

Mera naam Ali hai, mujhe DHA Lahore mein 5 marla house chahiye. Budget 2 crore tak hai. Phone 03001234567.

### Exercise 4 - Basic Workflow Banayein

Ek website form submit hota hai jisme customer name, phone, aur message hota hai. Aapko simple AI lead capture workflow design karna hai.

Flow likhein: Input -> AI -> Decision -> Action -> Response

### Exercise 5 - Reply Draft Karein

Customer message:

Payment cut gayi hai lekin order confirm nahi hua. Jaldi check karein.

Iska polite support reply draft karein.



## 1.11 Answer Key

---

### Answer 1

Suitable tasks: 1, 2, 4, 5. Payment transfer approve karna high-risk action hai, is mein human approval zaroori hona chahiye.

### Answer 2

| Message                        | Intent                        |
|--------------------------------|-------------------------------|
| Price kya hai?                 | price_inquiry                 |
| Mera order abhi tak nahi aya.  | order_status / delivery_delay |
| Mujhe refund chahiye.          | refund_request                |
| Kal appointment mil sakti hai? | appointment_booking           |
| Menu share kar dein.           | menu_request                  |

### Answer 3

```
{  
  "name": "Ali",  
  "phone": "03001234567",  
  "intent": "property_inquiry",  
  "location": "DHA Lahore",  
  "property_type": "house",  
  "size": "5 marla",  
  "budget": "2 crore",  
  "lead_quality": "high"  
}
```

### Answer 4

#### Website Form

- > AI extracts name, phone, message, service
- > AI classifies lead as price inquiry / service request / complaint
- > Save lead in Google Sheet or CRM
- > Generate polite reply
- > Notify business owner

### Answer 5

Sorry for the inconvenience. Please apna order number ya registered phone number share kar dein taake hum payment aur order status check kar saken. Agar payment deduct hui hai, hum is issue ko priority par review karenge.

## 1.12 Common Beginner Mistakes

---

### Mistake 1

AI ko vague instruction dena, jaise: "reply do". Prompt clear hona chahiye.

### Mistake 2

Missing data ke bawajood AI se final answer generate karwana.

### Mistake 3

Har task mein AI use karna, jab simple rule enough ho.

### Mistake 4

Human handoff ka option na rakhna.

## 1.13 Upgrade Challenge

---

Ab aap same AC service workflow ko thora improve karein. Ismein yeh features add karein:

- Customer ka area collect ho.
- Preferred time collect ho.
- Urgency high/medium/low detect ho.
- Lead Google Sheet format mein save ho.
- Agar customer angry ho to human support flag true ho.

Expected output JSON format kuch is tarah ho sakta hai:

```
{
  "intent": "service_request",
  "service": "AC repair",
  "problem": "cooling issue",
  "area": null,
  "preferred_time": null,
  "urgency": "medium",
  "needs_human": false,
  "next_action": "ask_missing_details"
}
```

## 1.14 Chapter Recap

---

Is chapter mein aap ne AI Automation ka basic foundation samjha. Ab aap jante hain ke automation sirf AI reply generate karne ka naam nahi, balkay input, understanding, decision, action, storage, aur response ka complete flow hai.

- AI Automation repetitive business tasks automate karti hai.
- AI natural language samajh kar intent detect kar sakti hai.
- Traditional automation fixed rules par chalti hai.
- AI Automation flexible text understanding provide karti hai.
- Business value fast response, better lead capture, aur less manual work mein hota hai.
- High-risk tasks mein human approval zaroori hai.

**Next Chapter:** Chapter 2 mein hum AI Automation Mindset par kaam karenge. Aap seekhein ge ke kisi bhi business ka workflow analyze kaise karna hai aur automation opportunity identify kaise karni hai.

# AI Automation Mindset

Is chapter mein aap seekhein ge ke automation tool se pehle soch kaise develop karni hai: problem identify karna, process map karna, aur practical automation opportunity choose karna.

## Chapter 2 ka mindset flow



## Chapter ke end tak aap yeh kar sakein ge

- Business process ko automation angle se dekhna.
- Repetitive tasks identify karna.
- Good automation idea aur weak automation idea mein farq samajhna.
- Client ya apne business ke liye simple automation audit banana.

## 2.1 Automation Mindset Kya Hota Hai?

---

AI Automation seekhne ke liye sirf tools ka naam yaad karna enough nahi hota. Real skill yeh hai ke aap kisi bhi business process ko dekh kar samajh saken ke is mein kaunsa kaam repeat hota hai, kaunsa kaam slow hai, kaunsa kaam human se mistake karwa sakta hai, aur kaunsa kaam AI ki help se improve ho sakta hai.

**Automation mindset** ka matlab hai har problem ko is nazariye se dekhna:

**Question:** Kya is kaam ka koi repeatable pattern hai jise AI, workflow, form, spreadsheet, ya API ke through faster aur cleaner banaya ja sakta hai?

Beginner ke liye sab se important rule yeh hai: pehle problem samjho, phir tool choose karo. Agar problem clear nahi hai, to Make.com, n8n, ChatGPT, API, ya kisi bhi tool ka use confusing ho jata hai.

### Tool-first soch

"Mujhe n8n seekhna hai, ab main kya banaun?"

Yeh approach aksar confusion create karti hai.

### Problem-first soch

"Restaurant ko WhatsApp orders manually handle karne mein time lagta hai."

Yahan automation ka use case clear hai.

## 2.2 Beginner Ki Sab Se Badi Mistake

---

Beginners aksar pehle hi din complete AI agent, voice bot, RAG chatbot, ya advanced SaaS build karna chahte hain. Yeh excitement achi baat hai, lekin learning ke start mein yeh overwhelm create karti hai.

Book 1 ka approach simple hai: **small automation first**. Pehle aap ek chhota kaam automate karein, usay test karein, phir us automation ko improve karein.

| Weak beginner approach                  | Better beginner approach                                 |
|-----------------------------------------|----------------------------------------------------------|
| "Main complete AI company banaunga."    | "Main pehle customer messages classify karna seekhunga." |
| "Bot har cheez automatically kare."     | "Bot pehle FAQs aur leads handle kare."                  |
| "Mujhe 10 tools ek saath seekhne hain." | "Main ek workflow ko clearly build aur test karunga."    |
| "AI se sab kuch perfect karwana hai."   | "AI ko specific task aur clear output dunga."            |

**Practical rule:** Agar aap automation ko one sentence mein explain nahi kar sakte, to woh automation abhi clear nahi hai.

## 2.3 Business Problem Se Start Karein

Har useful automation kisi real problem se start hoti hai. Problem ka matlab sirf technical error nahi hota. Business mein problem ka matlab ho sakta hai: time waste hona, customer reply late hona, leads miss hona, data scattered hona, ya staff ka repetitive kaam mein busy rehna.

### Problem example

Ek online store ko daily 100 WhatsApp messages aate hain. Staff manually reply karta hai, is wajah se replies late hotay hain.

### Automation angle

AI common questions answer kar sakta hai, order number ask kar sakta hai, aur serious complaints human ko forward kar sakta hai.

## Problem identify karne ka simple formula

**Problem = Repetitive kaam + Time waste + Clear input + Repeatable output**

Agar kisi kaam mein yeh 4 cheezen mil jayein, to woh beginner automation ke liye strong candidate ho sakta hai.

## 2.4 Repetitive Tasks Kaise Identify Karte Hain?

---

Automation opportunities identify karne ke liye aapko business ke daily tasks ko observe karna hota hai. Neechay kuch signs diye gaye hain jo batate hain ke yahan automation useful ho sakti hai.

### **Sign 1: Same questions repeat hotay hain**

Example: price, timing, delivery area, service charges, appointment availability.

### **Sign 2: Same data bar bar collect hota hai**

Example: name, phone, address, service type, budget, order ID.

### **Sign 3: Manual copy-paste hota hai**

Example: WhatsApp se Google Sheet mein lead details paste karna.

### **Sign 4: Staff ko decision repeat karna hota hai**

Example: complaint high priority hai ya normal inquiry.

## **Quick checklist**

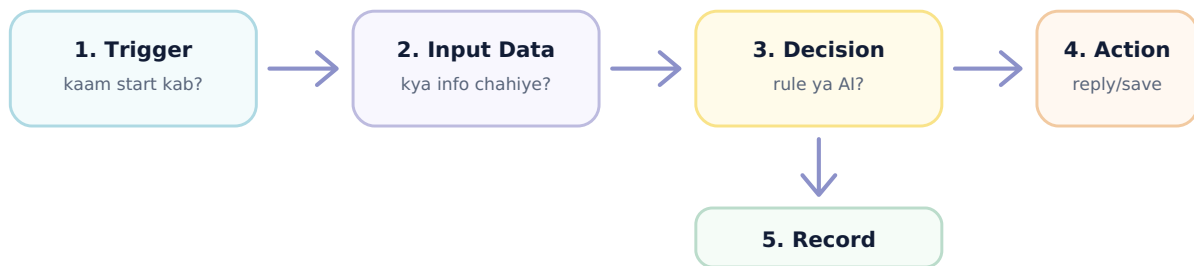
- Kya yeh task daily ya weekly repeat hota hai?
- Kya is task ka input same type ka hota hai?
- Kya output predictable hota hai?
- Kya task mein text samajhna zaroori hai?
- Kya task se time save ho sakta hai?
- Kya human approval optional ya required ho sakti hai?



## 2.5 Workflow Ko Map Karna Seekhein

Automation build karne se pehle workflow map karna zaroori hai. Workflow ka matlab hai: kaam start kahan se hota hai, data kahan se aata hai, decision kaise hota hai, action kya hota hai, aur result kahan save hota hai.

**Diagram 2.1 - Workflow audit canvas**



### Workflow audit ke 5 questions

1. **Trigger:** Kaam kab start hota hai? Message, form, email, ya manual entry?
2. **Input Data:** Kaunsi information chahiye?
3. **Decision:** Kya AI intent/category/priority samjhega?
4. **Action:** Reply send karna hai, sheet update karni hai, ticket create karna hai?
5. **Record:** Result kahan save hoga?

**Important:** Agar workflow map clear hai, automation build karna easy ho jata hai. Agar workflow vague hai, prompt aur tool dono confuse ho jate hain.

## 2.6 AI Ka Role Clearly Define Karein

AI Automation mein AI ko har kaam nahi dena chahiye. AI ko wahi kaam dena chahiye jahan text understanding, classification, extraction, summary, ya reply generation ki zaroorat ho.

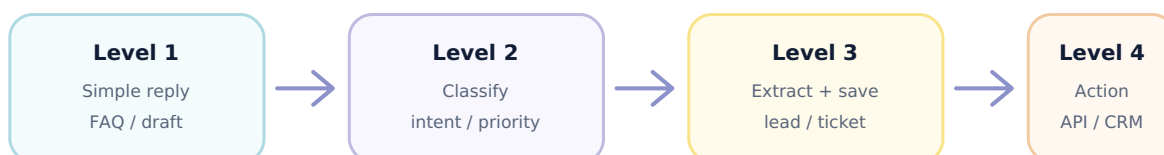
| Task                      | AI ka role                         | Tool ka role                            |
|---------------------------|------------------------------------|-----------------------------------------|
| Customer message samajhna | Intent detect karna                | WhatsApp/email se message receive karna |
| Lead details nikalna      | Name, phone, service extract karna | Google Sheet/CRM mein save karna        |
| Complaint handle karna    | Category aur priority decide karna | Ticket create karna                     |
| Reply dena                | Polite response draft karna        | Message send karna                      |

AI ka role jitna specific hoga, result utna better hoga. Vague instruction se vague output milta hai.

## 2.7 Automation Opportunity Levels

Har automation same level ki nahi hoti. Beginner ke liye yeh samajhna useful hai ke automation ko small levels mein divide kiya ja sakta hai.

**Diagram 2.2 - Automation ke 4 beginner levels**



### Level 1: Simple Reply

AI sirf reply draft karta hai. Example: price inquiry ka polite reply.

### Level 2: Classification

AI message ko category mein divide karta hai. Example: complaint, lead, order status.

### Level 3: Extraction + Save

AI important data nikalta hai aur workflow usay sheet/CRM mein save karta hai.

### Level 4: Action

System API call karta hai, ticket create karta hai, ya team ko notify karta hai.

**Beginner recommendation:** Book 1 mein Level 1 se Level 3 tak strong grip banayein. Level 4 ka basic concept samjhein. Advanced implementation Book 2 aur Book 3 mein aayegi.

## 2.8 Good Automation Idea vs Bad Automation Idea

Har cheez automate nahi karni chahiye. Smart automation wahi hoti hai jo business ko value de, human work ko simplify kare, aur customer experience improve kare.

| Good automation idea                                      | Kyon good hai?                                            |
|-----------------------------------------------------------|-----------------------------------------------------------|
| Customer FAQs ka auto reply                               | Same questions repeat hotay hain, output predictable hai. |
| Lead details extract karke Google Sheet mein save karna   | Manual copy-paste reduce hota hai.                        |
| Complaint ko high/medium/low priority mein classify karna | Team ko urgent cases jaldi milte hain.                    |
| Email summary aur reply draft banana                      | Human final review kar sakta hai, time save hota hai.     |

| Bad automation idea                             | Problem kya hai?                                 |
|-------------------------------------------------|--------------------------------------------------|
| AI ko bina data ke final business decision dena | AI guess karega aur wrong decision ho sakta hai. |
| Refund approve karna without human review       | Financial risk high hai.                         |
| Legal/medical final advice auto-send karna      | High risk aur compliance issue ho sakta hai.     |
| Bot ko har situation handle karne ko kehna      | Fallback aur human handoff missing hoga.         |

## 2.9 Human Handoff Ka Mindset

AI Automation ka matlab yeh nahi ke human ki zaroorat khatam ho jati hai. Real business systems mein human handoff bohot important hota hai.

Human handoff ka matlab hai: jab AI confident na ho, customer angry ho, query sensitive ho, ya business decision human approval require karta ho, to bot ya automation conversation ko human team ko forward kar de.

### AI handle kare

- FAQ
- Basic lead capture
- Order ID ask karna
- General service details

### Human handle kare

- Refund approval
- Angry complaint
- Custom quotation
- Confusing or sensitive cases

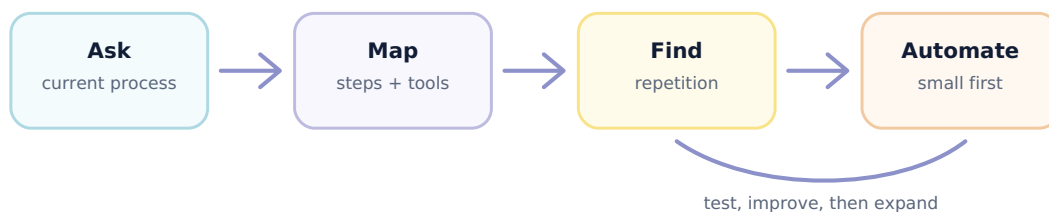
Human handoff rule example:

Agar message mein "refund", "legal", "manager", "angry", "urgent", ya "complaint" ho aur AI confidence low ho, to human support ko notify karo.

## 2.10 Client Workflow Discovery

Agar aap AI Automation service sell karna chahte hain, to client se pehle tool ka naam discuss na karein. Pehle unka current process samjhein. Client ko usually n8n, API, prompts, RAG, embeddings se farq nahi padta. Client ko farq padta hai ke unka time save ho, response fast ho, aur kaam organized ho.

**Diagram 2.3 - Client discovery process**



### Client se poochne ke practical questions

- Aapko daily kitne customer messages aate hain?
- Sab se common 10 questions kaun se hain?
- Leads kahan save hoti hain?
- Kaunsa kaam staff ko repeat karna padta hai?
- Complaint ya urgent query ka process kya hai?
- Customer ko reply dene mein average kitna time lagta hai?
- Aap WhatsApp, email, website form, ya Instagram use karte hain?
- Kya human approval required hoti hai?

## 2.11 Practical Mini Project - Automation Audit Sheet

Is mini project mein aap kisi bhi business ka ek simple automation audit banayein ge. Aap restaurant, e-commerce store, clinic, property dealer, salon, tuition academy, ya software agency choose kar sakte hain.

## Exercise 2.1 - Business choose karein

Ek business choose karein aur uske 5 repetitive tasks likhein. Har task ke saamne likhein ke AI ka role kya ho sakta hai aur final action kya ho sakta hai.

| Task | AI ka role | Final action |
|------|------------|--------------|
| ...  | ...        | ...          |
| ...  | ...        | ...          |
| ...  | ...        | ...          |

## Sample Answer - Restaurant

| Task                           | AI ka role                                   | Final action                 |
|--------------------------------|----------------------------------------------|------------------------------|
| Menu request                   | Intent detect karna                          | Menu message send karna      |
| Order taking                   | Items aur quantity extract karna             | Order sheet mein save karna  |
| Delivery address collect karna | Address identify karna                       | Order record update karna    |
| Complaint receive karna        | Complaint category aur priority decide karna | Owner ko notify karna        |
| Timing question                | FAQ answer generate karna                    | Customer ko reply send karna |

## Exercise 2.2 - Automation score dein

Neechay diye gaye tasks ko 1 se 5 tak score dein. 1 ka matlab weak automation candidate, 5 ka matlab strong automation candidate.

1. Customer ka naam aur phone number save karna.
2. Customer ko legal final advice dena.
3. Order status ke liye order ID ask karna.
4. Refund approve karna without review.
5. Daily emails summarize karna.

## Answer Key 2.2

| Task                                | Score | Reason                                              |
|-------------------------------------|-------|-----------------------------------------------------|
| Name aur phone save karna           | 5     | Clear input, simple extraction, low risk.           |
| Legal final advice dena             | 1     | High risk, human expert required.                   |
| Order ID ask karna                  | 5     | Predictable support flow.                           |
| Refund approve karna without review | 1     | Financial risk, human approval required.            |
| Daily emails summarize karna        | 4     | Useful, but important emails may need human review. |

## 2.12 Practical Prompt - Automation Consultant Prompt

Yeh prompt aap kisi bhi business process ko analyze karne ke liye use kar sakte hain. Isay copy karne se pehle apne business details replace karein.

You are an AI automation consultant.  
Analyze the business process below and suggest beginner-friendly automation ideas.

Business type: [restaurant / clinic / e-commerce / real estate]

Current process: [write current manual process]

Main problem: [slow replies / missed leads / manual data entry]

Tools available: [WhatsApp, Google Sheets, Gmail, website form]

Return the answer in this format:

1. Repetitive tasks
2. Best automation opportunities
3. AI role
4. Workflow steps
5. Human handoff cases
6. First small project to build

## Exercise 2.3 - Prompt use karein

Upar wala prompt use karke ek e-commerce store ke liye automation ideas generate karein. Store ke problems yeh hain: late replies, order status questions, return/refund queries, aur product price questions.

## Sample Answer 2.3

1. **Repetitive tasks:** price questions, order status, return policy, product availability, delivery time.
2. **Best opportunities:** FAQ reply bot, order ID collection, lead capture, complaint categorization.
3. **AI role:** intent detection, customer message classification, reply draft generation.
4. **Workflow:** WhatsApp message -> AI classify -> if FAQ then reply -> if order status then ask order ID -> if complaint then notify human.
5. **Human handoff:** refund approval, angry customer, payment issue, damaged product complaint.
6. **First small project:** Customer message classifier with reply drafts.



## 2.13 Chapter Recap

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### Is chapter ki key learning

- Automation tool se pehle business problem samajhna zaroori hai.
- Best automation ideas repetitive, clear, low-risk, aur high-value tasks se start hoti hain.
- AI ka role specific hona chahiye: classify, extract, summarize, ya reply draft.
- Human handoff real business automation ka important part hai.
- Beginner ko pehle small automation build karni chahiye, phir improve karna chahiye.

## 2.14 Upgrade Challenge

---

Apne chosen business ke liye ek one-page automation proposal banayein. Proposal mein yeh cheezen include karein:

- Business problem
- Current manual process
- Proposed AI automation
- AI ka role
- Tools required
- Human handoff cases
- Expected benefit

**Next chapter:** Chapter 3 mein hum beginner tools overview dekhein ge: ChatGPT, Google Sheets, Gmail, Make.com, Zapier, n8n, Airtable, website forms, aur WhatsApp Business.

# Beginner Tools Overview

Is chapter mein aap AI Automation ke beginner tools ko practical nazariye se samjhein ge: kis tool ka kya role hai, kab use karna hai, aur simple business workflow ka tool stack kaise choose karna hai.

## Chapter 3 ka simple tool stack



## Chapter ke end tak aap yeh kar sakein ge

- AI model, workflow tool, spreadsheet, form, aur communication channel ka role samajhna.
- Beginner project ke liye right tool stack choose karna.
- Google Sheets ko simple database ke taur par plan karna.
- Make.com, Zapier, aur n8n ka high-level difference samajhna.
- Lead capture automation ke liye first practical tool plan banana.

## 3.1 Tools Ko Samajhna Kyon Zaroori Hai?

AI Automation sirf ek AI model ka naam nahi hai. Real automation mein multiple tools mil kar kaam karte hain. Ek tool message receive karta hai, doosra tool AI ko prompt bhejta hai, teesra tool data save karta hai, aur chautha tool customer ko reply ya team ko notification bhejta hai.

Beginner ke liye tools ka purpose samajhna bohot zaroori hai. Agar aap har tool ka role clear samajh lein, to automation build karna easy ho jata hai.

**Simple rule:** Tool ko feature ke hisaab se nahi, business task ke hisaab se choose karein.

### Wrong approach

"Mujhe Make.com use karna hai. Ab idea kya banaun?"

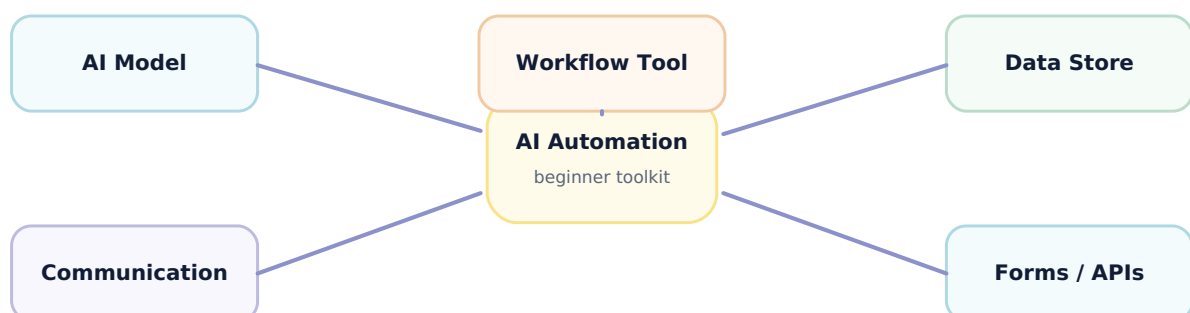
### Right approach

"Mujhe customer leads form se Google Sheet mein save karni hain. Kaunsa tool best rahega?"

## 3.2 Beginner AI Automation Toolkit

Beginner level par aapko har advanced tool seekhne ki zaroorat nahi. Aapko pehle yeh samajhna hai ke kaunsi category ka tool kis problem ke liye use hota hai.

**Diagram 3.1 - AI Automation tool categories**



| Tool category         | Purpose                                                         | Beginner example                          |
|-----------------------|-----------------------------------------------------------------|-------------------------------------------|
| AI Model              | Text samajhna, classify karna, extract karna, reply draft karna | Customer message ka intent detect karna   |
| Workflow Tool         | Different apps ko connect karna                                 | Form submit ho to sheet update karna      |
| Data Store            | Leads, orders, tickets, ya records save karna                   | Google Sheets ya Airtable                 |
| Communication Channel | Customer se message lena ya reply bhejna                        | Email, website form, WhatsApp             |
| Forms / APIs          | Data collect karna ya external system se connect hona           | Google Form, website form, simple webhook |

## 3.3 ChatGPT / AI Model Ka Role

AI model automation ka brain hota hai, lekin har cheez ka owner nahi hota. AI model ka best use tab hota hai jab task mein language understanding chahiye.

### AI ke best beginner use cases

- Customer message classify karna
- Name, phone, service extract karna
- Email summary banana
- Reply draft karna
- Complaint priority detect karna

### AI ko avoid karein jab

- Exact calculation required ho
- Payment approval ho
- Legal/medical final decision ho
- Business data missing ho
- Human verification zaroori ho

### AI ko clear task dein

AI model ko vague instruction na dein. Usay clear role, clear task, clear input, aur clear output format dein.

Bad prompt:  
Customer ka reply do.

Better prompt:  
You are a polite customer support assistant.  
Classify the customer message into one intent:  
price\_inquiry, order\_status, complaint, general\_question, human\_support.  
Then write a short Roman Urdu reply under 3 sentences.

## 3.4 Google Sheets as Beginner Database

Beginner AI Automation mein Google Sheets simple database ki tarah kaam kar sakta hai. Iska faida yeh hai ke client ya user easily data dekh sakta hai, filter kar sakta hai, aur manually edit bhi kar sakta hai.

**Important:** Google Sheets production database ka replacement nahi, lekin beginner projects aur small businesses ke liye excellent starting point hai.

### Lead capture sheet structure

| Column     | Purpose                   | Example            |
|------------|---------------------------|--------------------|
| created_at | Lead kab aayi             | 2026-06-30 10:45   |
| name       | Customer name             | Ali Khan           |
| phone      | Contact number            | 0300xxxxxxx        |
| message    | Original customer message | AC repair ka rate? |
| intent     | AI detected category      | price_inquiry      |
| priority   | Lead importance           | medium             |
| status     | Follow-up status          | new                |

## 3.5 Gmail and Email Automation

---

Email automation beginner ke liye strong project hai kyun ke emails usually structured hote hain. AI incoming email ko summarize kar sakta hai, category assign kar sakta hai, aur reply draft kar sakta hai.

### Useful email automations

- Sales inquiry summary
- Support email category
- Follow-up draft
- Daily email digest
- Urgent email flagging

### Safe beginner approach

- AI reply draft kare
- Human final send kare
- High-risk emails auto-send na hon
- Important emails review queue mein jayein

### Simple email assistant flow

```
New email received
-> AI summarizes email
-> AI assigns category
-> AI drafts reply
-> Human reviews
-> Reply sent
```

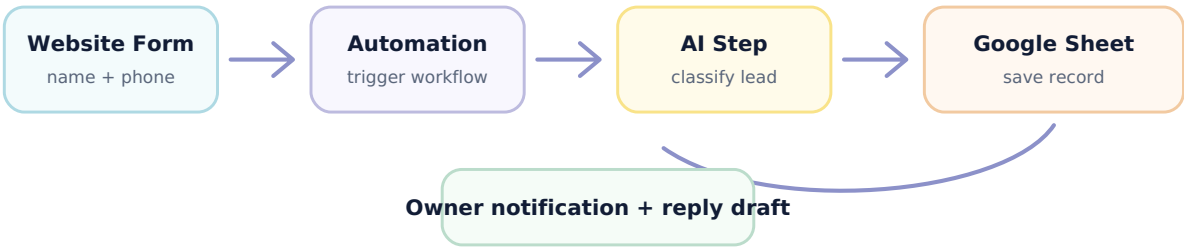
## 3.6 Google Forms and Website Forms

---

Forms automation ka simple aur powerful starting point hain. Form ka data structured hota hai, is liye automation easily reliable ban sakti hai.

| Form field     | Why useful                     | Automation action                  |
|----------------|--------------------------------|------------------------------------|
| Name           | Personalized reply ke liye     | Greeting generate karna            |
| Phone / Email  | Follow-up ke liye              | CRM ya sheet mein save karna       |
| Service needed | Lead type samajhne ke liye     | Category assign karna              |
| Message        | Customer need samajhne ke liye | AI summary aur intent detect karna |

Diagram 3.2 - Beginner lead capture stack



## 3.7 Make.com, Zapier, and n8n

Workflow tools ka kaam hota hai different apps ko connect karna. Example: jab form submit ho, to data Google Sheet mein save ho, AI se classify ho, aur owner ko email notification chali jaye.

| Tool     | Beginner view                                        | Best use                                 |
|----------|------------------------------------------------------|------------------------------------------|
| Zapier   | Simple aur beginner-friendly automation builder      | Quick app-to-app automations             |
| Make.com | Visual scenarios, routers, filters, aur HTTP modules | Flexible business workflows              |
| n8n      | Powerful low-code workflow tool                      | Developers aur custom automation systems |

**Beginner recommendation:** Agar aap non-technical hain to Zapier/Make.com se start karna easy hai. Agar aap developer hain to n8n aapko long-term zyada control de sakta hai.

## 3.8 Airtable, Notion, and Simple CRMs

Google Sheets ke baad next step Airtable ya simple CRM ho sakta hai. Airtable spreadsheet jaisa feel deta hai, lekin records, views, fields, attachments, aur relationships ko better handle kar sakta hai.

### Google Sheets use karein jab

- Project simple ho
- Client spreadsheet comfortable ho
- Leads ya orders basic hon
- Fast setup chahiye

### Airtable/CRM use karein jab

- Multiple statuses hon
- Views/filtering important ho
- Team collaboration ho
- Records structured hon

## 3.9 WhatsApp Business for Beginners

Pakistan aur similar markets mein WhatsApp business communication ka major channel hai. Beginner level par aapko pehle WhatsApp bot ka complete technical implementation nahi, balkay bot flow planning samajhni chahiye.

### Basic WhatsApp automation planning

- Customer ka first message kya hota hai?
- Common questions kaun se hain?
- Bot ko kaunsi information collect karni hai?
- Kab human handoff required hai?
- Data kahan save hona hai?



**Safety note:** WhatsApp automation mein official API, user consent, template rules, aur business policies ko samajhna zaroori hota hai. Beginner level par pehle flow design karein, phir implementation choose karein.

## 3.10 APIs and Webhooks - Simple Introduction

API aur webhook advanced lagte hain, lekin beginner ko inka simple concept zaroor samajhna chahiye. API ka matlab hai ek software dusre software se data maangta ya bhejta hai. Webhook ka matlab hai jab event hota hai to system automatically data dusri jagah bhej deta hai.

### API example

Automation order ID bhejti hai aur e-commerce system se order status receive karti hai.

### Webhook example

Website form submit hota hai aur data automatically automation workflow ko send ho jata hai.

**Diagram 3.3 - Tool selection decision flow**



## 3.11 Use Case Based Tool Stacks

Ab kuch practical tool stack examples dekhte hain. In examples ka purpose yeh nahi ke aap same tools hi use karein. Purpose yeh hai ke aap soch samajh sakein ke har workflow mein tool roles kaise divide hote hain.

| Use case           | Input            | AI role                 | Data store         | Output             |
|--------------------|------------------|-------------------------|--------------------|--------------------|
| Lead capture       | Website form     | Lead summary + priority | Google Sheet       | Email notification |
| Email assistant    | New email        | Summary + reply draft   | Sheet/CRM optional | Draft reply        |
| Customer support   | Message          | Intent classification   | Conversation log   | Short reply        |
| Restaurant inquiry | WhatsApp message | Menu/order intent       | Orders sheet       | Confirmation reply |

## 3.12 Practical Mini Project - First Tool Stack Plan

Is mini project mein aap ek beginner automation ka tool stack design karein ge. Goal yeh hai ke aap pehle implementation ke bajaye plan clear karein.

### Exercise 3.1 - Tool stack choose karein

Scenario: Ek small AC repair business ko website form aur WhatsApp se leads aati hain. Owner chahta hai ke leads automatically save hon, service type identify ho, aur owner ko notification mil jaye.

Neechay ke format mein tool stack likhein:

1. Input channel
2. Workflow tool
3. AI ka role
4. Data store
5. Notification method
6. Human handoff case

## Sample Answer 3.1

| Part          | Recommended choice                                       |
|---------------|----------------------------------------------------------|
| Input channel | Website form first; WhatsApp flow later                  |
| Workflow tool | Make.com or Zapier for beginner setup                    |
| AI role       | Extract service type, summarize message, assign priority |
| Data store    | Google Sheets lead tracker                               |
| Notification  | Email or WhatsApp message to owner                       |
| Human handoff | Urgent complaint, unclear location, pricing negotiation  |

## Exercise 3.2 - Sheet columns design karein

AC repair business ke liye Google Sheet ke 8 columns design karein jahan leads save hongi.

## Answer Key 3.2

1. created\_at
2. customer\_name
3. phone\_number
4. area\_location
5. service\_type
6. original\_message
7. priority
8. status

### Exercise 3.3 - Best tool choose karein

Neechay diye gaye tasks ke liye best beginner tool/category choose karein:

1. Customer message se name aur phone extract karna
2. Website form submit hote hi workflow start karna
3. Lead details save karna
4. Owner ko new lead notification bhejna
5. Customer inquiry ko complaint ya price inquiry mein classify karna

### Answer Key 3.3

| Task                                | Tool/category               | Reason                              |
|-------------------------------------|-----------------------------|-------------------------------------|
| Name aur phone extract karna        | AI Model                    | Text understanding required hai.    |
| Form submit par workflow start      | Webhook/Form trigger        | Event se automation start hoti hai. |
| Lead details save karna             | Google Sheets/Airtable      | Structured record save karna hai.   |
| Owner notification                  | Email/WhatsApp notification | Team ko alert karna hai.            |
| Complaint ya price inquiry classify | AI Model                    | Intent detection required hai.      |

## 3.13 Beginner Tool Selection Checklist

---

Kisi bhi beginner automation project se pehle yeh checklist use karein:

- Input source clear hai?
- Customer data ka format clear hai?
- AI ko kya karna hai clearly defined hai?
- Data kahan save hoga?
- Notification kisko milegi?
- Human handoff cases defined hain?
- Test data ready hai?
- Failure case ka fallback message ready hai?

## 3.14 Chapter Recap

---

### Is chapter ki key learning

- AI Automation multiple tools ka combination hoti hai.
- AI model ka role text samajhna, classify karna, extract karna, summarize karna, aur reply draft karna hai.
- Google Sheets beginner projects ke liye simple database ban sakta hai.
- Workflow tools apps ko connect karte hain.
- Best tool stack hamesha business problem ke hisaab se choose hota hai.

## 3.15 Upgrade Challenge

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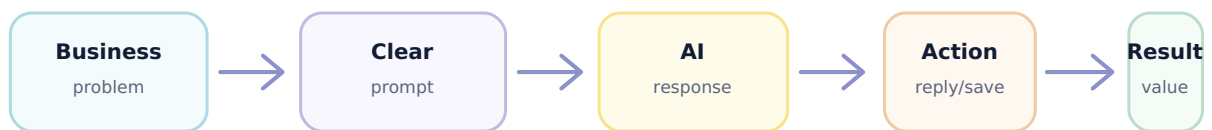
Apne chosen business ke liye ek complete beginner tool stack diagram banayein. Diagram mein yeh cheezen zaroor include karein: **input channel, workflow tool, AI task, data store, notification, aur human handoff.**

**Next chapter:** Chapter 4 mein hum Prompt Engineering Basics start karein ge. Wahan aap seekhein ge ke automation ke liye strong prompts kaise likhte hain.

# Prompt Engineering Basics

Is chapter mein aap seekhein ge ke AI ko clear instructions kaise deni hain, prompt ka structure kaise banana hai, aur business automation ke liye practical prompts kaise test aur improve karne hain.

## Chapter 4 ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Prompt ka role automation workflow mein samajhna.
- Good prompt aur bad prompt ka difference identify karna.
- Role, context, task, rules, aur output format ke saath strong prompt likhna.
- Customer support, lead qualification, email reply, aur complaint summary prompts banana.
- Prompt ko real examples par test aur improve karna.

## 4.1 Prompt Kya Hota Hai?

---

Prompt woh instruction hoti hai jo aap AI ko dete hain. Simple words mein prompt AI ke liye kaam ka brief hota hai. Agar brief clear ho, result useful hota hai. Agar brief vague ho, result random, incomplete, ya inconsistent ho sakta hai.

AI Automation mein prompt sirf sawal poochne ke liye nahi hota. Prompt workflow ka decision-making step ban sakta hai. Prompt customer ka message samajh kar intent detect kar sakta hai, data extract kar sakta hai, reply draft kar sakta hai, aur next action suggest kar sakta hai.

**Simple rule:** AI ko wahi output milta hai jiska direction prompt mein clear hota hai.

### Weak prompt

Customer ko reply do.

Problem: tone, length, language, intent, aur business rules clear nahi.

### Strong prompt

Customer support assistant ki tarah Roman Urdu mein polite reply likho. Agar order number missing ho to order number ask karo. Reply 2 sentences se zyada na ho.

Result: controlled, useful, aur workflow-ready.

## 4.2 Prompt Engineering Automation Mein Kyon Important Hai?

---

Normal ChatGPT use mein aap AI se casually baat karte hain. Lekin automation mein AI ka output kisi next step ko trigger kar sakta hai. Agar output unclear ho, workflow fail ho sakta hai.

Example: agar AI ko customer message classify karna hai aur woh kabhi "complaint", kabhi "issue", kabhi "problem" output kare, to automation router confuse ho sakta hai. Is liye prompt mein allowed labels clearly define karna zaroori hota hai.

| Use case               | Bad output problem                       | Prompt ka solution                                 |
|------------------------|------------------------------------------|----------------------------------------------------|
| Message classification | AI random category likh deta hai         | Allowed categories list kar dein                   |
| Data extraction        | Name/phone missing ya wrong format       | Required fields aur empty value rule define karein |
| Email reply            | Reply bohot long ya informal ho jata hai | Tone, length, aur format set karein                |
| Complaint handling     | AI issue ko serious nahi leta            | Priority rules aur escalation rule add karein      |

## 4.3 Strong Prompt Ka Structure

Beginner level par aap prompt ko 5 basic parts mein divide kar sakte hain:

**Diagram 4.1 - Strong prompt anatomy**



### 1. Role

AI ko batayein ke woh kis role mein answer de.

Example: You are a polite customer support assistant.

### 2. Context

Business, customer, product, ya situation ka background dein.

Example: This is an online store selling shoes.



### 3. Task

AI se exactly kya karwana hai, clear likhein.

Example: Classify the message and write a short reply.

### 4. Rules

Limitations, allowed values, tone, aur safety rules define karein.

Example: Do not promise delivery date without order number.

### 5. Output Format

AI ka answer kis format mein chahiye, specify karein.

Example: Return JSON with intent, priority, and reply.

### Bonus: Example

AI ko sample input/output dikhane se consistency improve hoti hai.

Example: Input: price? Output: price\_inquiry.

## 4.4 Bad Prompt vs Good Prompt

---

Prompt engineering ka sab se simple tareeqa yeh hai ke aap weak prompt ko strong prompt mein convert karna seekhein.

### Example 1 - Customer support reply

Weak prompt:

Reply to this customer message:

"Mera order abhi tak nahi aya."

Strong prompt:  
You are a polite customer support assistant for an online store.  
Reply in Roman Urdu.  
Customer message: "Mera order abhi tak nahi aya."  
Rules:  
- Apologize briefly.  
- Ask for order number if missing.  
- Do not invent delivery status.  
- Keep reply under 2 sentences.  
  
Output only the customer reply.

## Expected output

Sorry for the inconvenience. Please apna order number share kar dein taake hum delivery status check kar saken.

## Example 2 - Lead qualification

Weak prompt:  
Is lead ko check karo.

Strong prompt:  
You are a sales lead qualification assistant.  
Read the customer message and classify lead quality.  
Allowed lead\_quality values: high, medium, low.  
Rules:  
- high: customer has clear need, budget, urgency, or phone number.  
- medium: customer asks about details or pricing but has no urgency.  
- low: customer message is vague or only says "details".  
Return output in this format:  
lead\_quality: ...  
reason: ...  
next\_question: ...  
  
Customer message:  
"Mujhe restaurant ke liye WhatsApp order bot chahiye. Price aur setup time bata dein."

## 4.5 Prompt Template Formula

Har prompt ko zero se likhne ki zaroorat nahi. Aap ek formula use kar sakte hain:

**Prompt Formula:** Role + Context + Task + Rules + Output Format + Input

```
You are [role].  
Context: [business situation].  
Task: [exact work AI should do].  
Rules:  
- [rule 1]  
- [rule 2]  
- [rule 3]  
Output format:  
[format]  
Input:  
[user/customer message]
```

Is formula ko aap customer support, email reply, lead capture, complaint summary, ya data extraction mein reuse kar sakte hain.

## 4.6 Practical Prompt Templates

---

Ab kuch ready-to-use beginner prompt templates dekhte hain. In templates ko copy-paste karne ke bajaye apne business use case ke hisaab se modify karein.

## Template 1 - Customer message classifier

```
You are an AI assistant for customer support automation.
Read the customer message and classify it.
Allowed intents:
- price_inquiry
- order_status
- complaint
- product_question
- human_support
- general_question

Rules:
- Use only one intent from the allowed list.
- If customer is angry or issue is serious, set priority as high.
- If required information is missing, mention what is missing.

Return this format:
intent: ...
priority: low/medium/high
missing_info: ...
suggested_reply: ...

Customer message:
[PASTE MESSAGE HERE]
```

## Template 2 - Lead qualification prompt

```
You are a sales assistant for a service business.
Analyze the lead message and qualify the lead.

Lead quality rules:
- high: clear requirement + urgency or budget or phone number
- medium: interested but details are incomplete
- low: vague message with no clear need

Return:
lead_quality: high/medium/low
service_needed: ...
urgency: low/medium/high
next_question: ...
short_reply: ...

Lead message:
[PASTE MESSAGE HERE]
```

## Template 3 - Email reply assistant

You are a professional email assistant.  
Write a polite reply in simple English or Roman Urdu, depending on the customer's language.

Rules:

- Keep the reply clear and short.
- Do not make false promises.
- If information is missing, ask for it.
- Use a helpful and respectful tone.

Customer email:

[PASTE EMAIL HERE]

Output:

Subject: ...

Reply: ...

## Template 4 - Complaint summary prompt

You are a complaint handling assistant.  
Read the customer complaint and create a short internal summary.

Rules:

- Identify the main issue.
- Assign category.
- Assign priority.
- Decide if human support is needed.

Allowed categories:

payment\_issue, delivery\_issue, product\_issue, refund\_request, technical\_issue, other

Output:

summary: ...

category: ...

priority: low/medium/high

needs\_human: yes/no

customer\_reply: ...

Complaint:

[PASTE COMPLAINT HERE]

## 4.7 Tone, Language, Aur Length Control

AI ka output professional banane ke liye tone aur language control karna bohot important hai. Aap prompt mein directly define kar sakte hain ke reply formal ho, friendly ho, short ho, Roman Urdu mein ho, ya simple English mein ho.

| Need              | Prompt instruction                                           | Expected result         |
|-------------------|--------------------------------------------------------------|-------------------------|
| Short reply       | Keep reply under 2 sentences.                                | Concise response        |
| Roman Urdu        | Reply in Roman Urdu.                                         | Local audience friendly |
| Professional tone | Use polite and professional tone.                            | Client-ready output     |
| No fake promise   | Do not invent price, availability, or delivery status.       | Safer automation        |
| Human handoff     | If issue is serious, ask customer to wait for human support. | Better support flow     |

**Automation tip:** Prompt mein "do not invent" rule zaroor add karein jab prices, order status, legal, medical, payment, ya delivery information involved ho.

## 4.8 Output Format Clear Rakhna

Automation ke liye output format bohot important hai. Agar AI reply natural paragraph mein de aur workflow ko intent chahiye ho, to next step fail ho sakta hai. Is liye beginner level par bhi output format clear karna seekhein.

## Human-readable output

Jab sirf user ya team ko read karna ho.

```
Intent: complaint
Priority: high
Reply: Sorry, please share order
number.
```

## Workflow-ready output

Jab automation ko next step trigger karna ho.

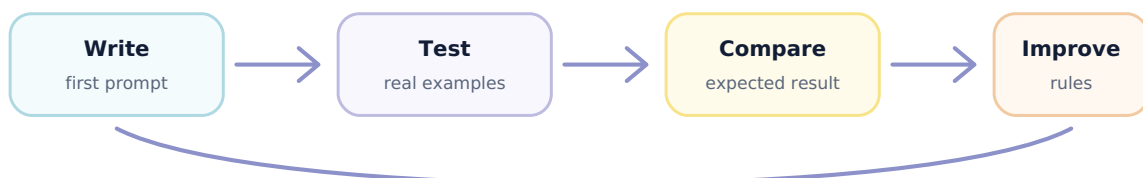
```
{
  "intent": "complaint",
  "priority": "high",
  "reply": "Sorry, please share
order number."
}
```

JSON ka detailed topic Chapter 7 mein cover hoga. Filhal aapko bas yeh samajhna hai ke structured output automation ko predictable banata hai.

## 4.9 Prompt Testing Method

Prompt pehli dafa perfect nahi hota. Professional automation builder prompt ko real messages par test karta hai, expected output se compare karta hai, phir prompt improve karta hai.

**Diagram 4.2 - Prompt testing loop**



## Testing ke liye 5 sample messages

| # | Customer message                               | Expected intent  |
|---|------------------------------------------------|------------------|
| 1 | Price kya hai?                                 | price_inquiry    |
| 2 | Mera order abhi tak nahi aya.                  | order_status     |
| 3 | Payment cut gayi lekin order confirm nahi hua. | complaint        |
| 4 | Kya yeh shoes size 32 mein hain?               | product_question |
| 5 | Mujhe agent se baat karni hai.                 | human_support    |

## 4.10 Practical Workflow Example

Ab ek simple customer support automation ka prompt workflow dekhte hain.

**Diagram 4.3 - Customer support prompt workflow**



### Scenario

Ek online store ko daily customer messages aate hain. Owner chahta hai ke AI pehle message ka intent samjhe, priority set kare, aur short reply draft kare. Serious cases human support ko forward hon.



## Prompt

You are a customer support automation assistant for an online store.  
Analyze the customer message.

Allowed intents:

price\_inquiry, order\_status, complaint, product\_question, human\_support,  
general\_question

Rules:

- Use only one allowed intent.
- If customer is angry, payment is involved, or refund is requested, priority should be high.
- Do not invent order status, price, or delivery time.
- Reply in Roman Urdu.
- Keep reply under 2 sentences.

Return:

intent: ...  
priority: low/medium/high  
needs\_human: yes/no  
reply: ...

Customer message:

"Payment cut gayi hai lekin order confirm nahi hua. Ab kya karun?"

## Expected output

intent: complaint  
priority: high  
needs\_human: yes  
reply: Sorry for the inconvenience. Please apna order number ya payment screenshot share kar dein taake support team isay priority par check kar sake.

## 4.11 Common Prompt Mistakes

---

### Mistake 1 - Vague task

AI ko sirf "reply karo" kehna. Is se tone aur result unpredictable hota hai.

### Mistake 2 - No output format

Automation ke liye structured output chahiye hota hai. Format missing ho to workflow break ho sakta hai.

### Mistake 3 - Too many tasks

Ek prompt mein bohot zyada kaam dalne se output weak ho jata hai.

### Mistake 4 - No fallback

Agar information missing ho to AI ko kya karna hai, yeh rule define hona chahiye.

**Better approach:** Complex automation mein ek huge prompt ki bajaye small prompts ka chain banayein. Pehle classify, phir extract, phir reply generate.

## 4.12 Mini Project - Online Store Prompt Pack

---

Is mini project mein aap ek online store ke liye 3 prompts banayein ge:

- Customer message classifier
- Order status reply assistant
- Complaint summary assistant

## Project requirements

| Prompt             | Input                                  | Output                             |
|--------------------|----------------------------------------|------------------------------------|
| Classifier         | Customer message                       | intent, priority, needs_human      |
| Order status reply | Customer message + order number status | Short customer reply               |
| Complaint summary  | Customer complaint                     | summary, category, priority, reply |

### Exercise 4.1 - Weak prompt improve karein

Weak prompt:

Customer ko reply do: "Mera parcel late hai."

Isay strong prompt mein convert karein. Prompt mein role, task, rules, language, aur output format include karein.

### Answer 4.1

```
You are a polite customer support assistant for an online store.
Customer message: "Mera parcel late hai."
Task: Write a short reply in Roman Urdu.
Rules:
- Apologize briefly.
- Ask for order number if missing.
- Do not invent delivery status.
- Keep reply under 2 sentences.
Output only the customer reply.
```

## Exercise 4.2 - Intent classifier prompt likhein

Ek prompt likhein jo customer messages ko in categories mein classify kare:

**price\_inquiry, order\_status, complaint, product\_question, human\_support, general\_question**

## Answer 4.2

```
You are a customer message classification assistant.  
Read the customer message and choose exactly one intent.  
Allowed intents: price_inquiry, order_status, complaint, product_question,  
human_support, general_question.
```

```
Rules:
```

- Use only one allowed intent.
- If customer asks for a human, use human\_support.
- If customer reports a problem, use complaint.
- If intent is unclear, use general\_question.

```
Return:
```

```
intent: ...
```

```
reason: ...
```

```
Customer message:
```

```
[PASTE MESSAGE HERE]
```

## Exercise 4.3 - Lead qualification prompt

Ek service business ke liye prompt likhein jo lead ko high, medium, ya low classify kare aur next question suggest kare.

## Answer 4.3

You are a lead qualification assistant for a service business.  
Analyze the lead message.

Lead quality rules:

- high: clear requirement + urgency, budget, or contact number
- medium: interested but details incomplete
- low: vague or unclear message

Return:

lead\_quality: high/medium/low  
service\_needed: ...  
missing\_info: ...  
next\_question: ...  
short\_reply: ...

Lead message:

[PASTE MESSAGE HERE]

## Exercise 4.4 - Prompt test karein

Neechay diye gaye messages par apna classifier prompt test karein:

1. Price kya hai?
2. Payment cut gayi lekin order confirm nahi hua.
3. Size 34 available hai?
4. Mujhe human agent chahiye.

## Answer 4.4

| Message                                        | Intent           | Priority |
|------------------------------------------------|------------------|----------|
| Price kya hai?                                 | price_inquiry    | medium   |
| Payment cut gayi lekin order confirm nahi hua. | complaint        | high     |
| Size 34 available hai?                         | product_question | medium   |
| Mujhe human agent chahiye.                     | human_support    | medium   |

## Chapter 4 Recap

### Is chapter mein aap ne seekha

- Prompt AI ke liye clear instruction hota hai.
- Automation mein prompt output predictable hona chahiye.
- Strong prompt mein role, context, task, rules, aur output format hota hai.
- Business prompts ko real customer messages par test karna zaroori hai.
- Prompt mein language, tone, length, aur fallback rules define karein.
- Complex workflows ke liye small prompt steps better hote hain.

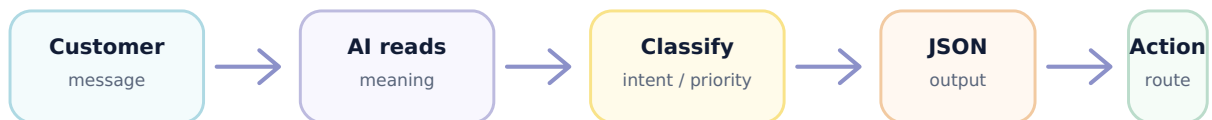
### Upgrade Challenge

Apne kisi real ya imaginary business ke liye 5-message test set banayein. Har message ke liye expected intent, priority, aur suggested reply define karein. Phir apna classifier prompt test karein aur dekhein ke AI expected result ke kitna close aata hai.

# Customer Message Classification

Is chapter mein aap seekhein ge ke customer messages ko intent, priority, sentiment, aur next action ke hisaab se kaise classify karna hai taake automation system correct route choose kar sake.

## Chapter 5 ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Customer message ka intent identify karna.
- Message ko category, priority, aur sentiment ke hisaab se classify karna.
- Allowed labels define karna taake AI random output na de.
- JSON-based classifier prompt likhna.
- Classification output ko workflow routing ke liye use karna.
- Real customer messages par classifier test karna.

## 5.1 Customer Message Classification Kya Hoti Hai?

---

Customer message classification ka matlab hai customer ke message ko samajh kar usay correct category mein rakhna. Business automation mein yeh step bohot important hai, kyun ke isi se decide hota hai ke next action kya hoga.

Example ke taur par agar customer likhta hai, "**Price kya hai?**" to AI ko samajhna chahiye ke yeh **price inquiry** hai. Agar customer likhta hai, "**Mera order abhi tak nahi aya**" to yeh **order status** ya **delivery complaint** ho sakta hai.

**Simple definition:** Classification AI ko yeh batati hai ke customer ka message kis type ka hai aur system ko next kya karna chahiye.

## 5.2 Automation Mein Classification Kyon Zaroori Hai?

---

Agar automation system customer ka message correctly understand nahi karega, to reply bhi wrong ho sakta hai aur action bhi wrong trigger ho sakta hai. Is liye classification automation ka foundation step hai.

### Without classification

Har message par same reply chala jata hai.

Example: Customer complaint kar raha hai lekin bot price list bhej deta hai.

### With classification

Har message ke type ke mutabiq correct action hota hai.

Example: Complaint ho to ticket create hota hai, price inquiry ho to price reply jata hai.



| Customer message              | Classification           | Next action                                   |
|-------------------------------|--------------------------|-----------------------------------------------|
| Price bata dein               | price_inquiry            | Price details ya service selection ask karein |
| Mera order late hai           | order_status / complaint | Order number ask karein                       |
| Product kharab nikla          | complaint                | Ticket create karein                          |
| Mujhe human se baat karni hai | human_support            | Team ko notify karein                         |

## 5.3 Intent Kya Hota Hai?

Intent ka matlab hai customer asal mein kya chahta hai. Customer ke exact words different ho sakte hain, lekin intent same ho sakta hai.

Example:

- "Price kya hai?"
- "Rate bata dein"
- "Charges kitne hain?"
- "Is service ka cost kya hoga?"

In sab messages ka intent same hai: **price\_inquiry**.

**Beginner tip:** Intent ko customer ke words se nahi, customer ke purpose se samjhein.

## Common beginner-level intents

### price\_inquiry

Customer price, rate, cost, ya charges pooch raha ho.

### order\_status

Customer existing order ki delivery ya status pooch raha ho.

### complaint

Customer problem, issue, damage, delay, ya bad experience report kar raha ho.

### new\_lead

Customer service/ product mein interest show kar raha ho.

### general\_question

Customer normal information ya FAQ type sawal pooch raha ho.

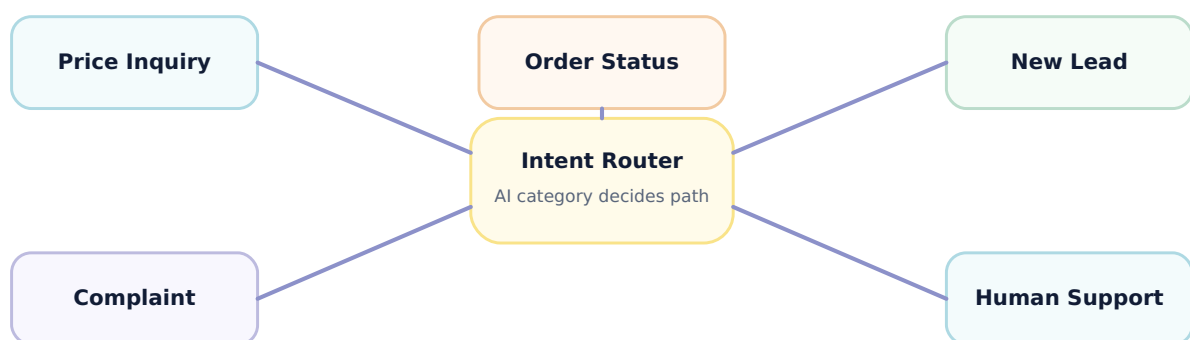
### human\_support

Customer human agent, call, ya direct contact demand kar raha ho.

## 5.4 Intent Router Ka Concept

Intent router woh logic hoti hai jo classification ke baad decide karti hai ke message kis route par jana chahiye. Yeh route automation platform, backend API, CRM, ticket system, ya human team ho sakta hai.

Diagram 5.1 - Intent router



Example restaurant bot mein agar intent **menu\_request** ho to menu send hoga. Agar intent **place\_order** ho to bot items collect karega. Agar intent **complaint** ho to owner ko alert milega.

## 5.5 Priority Classification

Intent ke saath priority bhi identify karna useful hota hai. Priority batati hai ke issue kitna urgent hai.

| Priority | Meaning                                              | Example                                         |
|----------|------------------------------------------------------|-------------------------------------------------|
| low      | Normal information request                           | "Aap delivery karte hain?"                      |
| medium   | Customer ko help chahiye lekin urgent risk nahi      | "Mera order late hai"                           |
| high     | Payment, refund, angry customer, ya urgent complaint | "Payment cut gayi lekin order confirm nahi hua" |

### Priority rules example

High priority agar:

- payment issue ho
- refund demand ho
- customer angry ho
- product damaged ho
- human support demand ho

Medium priority agar:

- order late ho
- delivery status unclear ho
- customer follow-up kar raha ho

Low priority agar:

- general question ho
- price inquiry ho
- normal information request ho

## 5.6 Sentiment Classification

---

Sentiment ka matlab customer ka mood ya emotion samajhna. Beginner level par 3 labels kaafi hain:

### positive

Customer satisfied, interested, ya friendly tone mein ho.

### neutral

Normal question ya simple request ho.

### negative

Customer angry, disappointed, ya complaint kar raha ho.

Sentiment se reply ka tone improve hota hai. Agar customer angry hai to bot ko extra polite aur apologetic hona chahiye. Agar customer normal question pooch raha hai to simple informative reply enough hai.

## 5.7 Classification Output Mein Kya Fields Hone Chahiye?

---

Automation-friendly classifier output structured hona chahiye. Is book ke beginner level par hum JSON output use karenin ge.

```
{
  "intent": "order_status",
  "category": "delivery",
  "priority": "medium",
  "sentiment": "negative",
  "needs_human": false,
  "missing_information": ["order_id"],
  "next_action": "ask_order_id",
  "suggested_reply": "Sorry for the delay. Please apna order number share kar dein taake hum status check kar saken."
}
```

Is output ko automation system easily read kar sakta hai. Agar **intent** complaint ho to ticket create ho sakta hai. Agar **missing\_information** mein order\_id hai to bot customer se order number ask karega.

## 5.8 Clean Classifier Prompt Template

---

Ab hum ek practical prompt banate hain jo customer message classify karega.

```
You are a customer message classifier for a small business.
```

```
Your task:
```

```
Classify the customer's message and return only valid JSON.
```

```
Allowed intents:
```

- price\_inquiry
- order\_status
- complaint
- new\_lead
- general\_question
- human\_support
- unknown

```
Allowed priority values:
```

- low
- medium
- high

```
Allowed sentiment values:
```

- positive
- neutral
- negative

```
Rules:
```

- Do not invent details.
- If required information is missing, add it in missing\_information.
- If customer asks for a human, set needs\_human to true.
- If message is unclear, use intent: "unknown" and ask a clarification question.
- Reply should be in Roman Urdu.

```
Customer message:
```

```
"{{customer_message}}"
```

```
Return JSON in this format:
```

```
{
  "intent": "",
  "category": "",
  "priority": "",
  "sentiment": "",
  "needs_human": false,
  "missing_information": [],
  "next_action": "",
  "suggested_reply": ""
}
```

## 5.9 Practical Example 1 - Price Inquiry

---

Customer message:

AC service ka rate kya hai?

Expected output:

```
{
  "intent": "price_inquiry",
  "category": "service_pricing",
  "priority": "low",
  "sentiment": "neutral",
  "needs_human": false,
  "missing_information": ["AC type", "location"],
  "next_action": "ask_service_details",
  "suggested_reply": "Ji, rate batane ke liye please AC ka type aur apni location share kar dein."
}
```

## 5.10 Practical Example 2 - Complaint

---

Customer message:

Payment deduct ho gayi lekin order confirm nahi hua. Yeh kya masla hai?

Expected output:

```
{
  "intent": "complaint",
  "category": "payment_issue",
  "priority": "high",
  "sentiment": "negative",
  "needs_human": true,
  "missing_information": ["order_id", "payment_reference"],
  "next_action": "create_ticket_and_ask_details",
  "suggested_reply": "Sorry for the inconvenience. Please apna order number ya payment reference share kar dein taake hum is issue ko urgently check kar saken."
}
```

## 5.11 Practical Example 3 - Human Support

Customer message:

Mujhe bot se baat nahi karni, kisi banda se baat karwao.

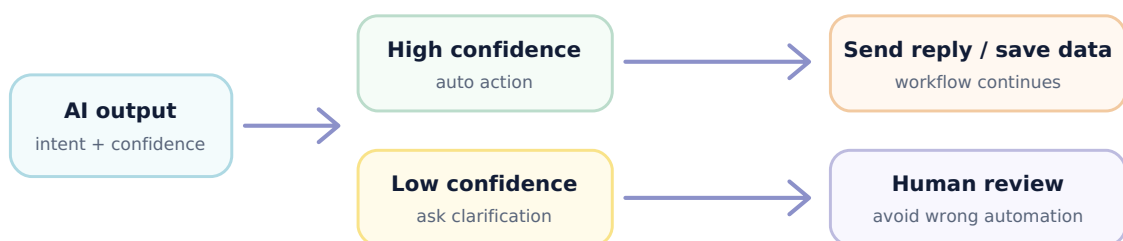
Expected output:

```
{
  "intent": "human_support",
  "category": "handoff_request",
  "priority": "high",
  "sentiment": "negative",
  "needs_human": true,
  "missing_information": [],
  "next_action": "handoff_to_human",
  "suggested_reply": "Ji, main aapko human support team se connect kar raha hoon. Thora sa wait kar dein."
}
```

## 5.12 Confidence Score Add Karna

Advanced nahi, lekin beginner automation ke liye confidence score helpful hota hai. Is se system decide kar sakta hai ke automation automatically proceed kare ya clarification ask kare.

**Diagram 5.2 - Confidence based routing**



```
{
  "intent": "order_status",
  "confidence": 0.86,
  "next_action": "ask_order_id"
}
```

Agar confidence 0.80 se upar ho to automation continue kar sakti hai. Agar confidence low ho to bot ko clarification ask karni chahiye.

## 5.13 Classification Testing Ka Practical Method

Prompt ko real customer messages par test karna zaroori hai. Sirf ek example par test karna enough nahi hota.

1. 10-20 sample customer messages collect karein.
2. Har message ka expected intent manually likhein.
3. AI classifier prompt run karein.
4. AI output ko expected output ke saath compare karein.
5. Jahan mistake ho, prompt rules improve karein.

| Test message    | Expected intent | AI output     | Status |
|-----------------|-----------------|---------------|--------|
| Price bata dein | price_inquiry   | price_inquiry | Pass   |
| Order late hai  | order_status    | complaint     | Review |
| Refund chahiye  | complaint       | complaint     | Pass   |



## 5.14 Common Mistakes

---

### 1. Allowed intents define na karna

AI random labels generate karega, jis se workflow router fail ho sakta hai.

### 2. JSON format enforce na karna

Automation ko clean structured output nahi milega.

### 3. Missing information handle na karna

Bot bina zaroori details ke wrong action le sakta hai.

### 4. Human handoff ignore karna

Angry ya serious customer ko bot mein stuck karna business ke liye risky hai.

## 5.15 Mini Project - Customer Message Classifier

---

Is mini project mein aap ek beginner-level classifier design karein ge jo customer message ko classify kare aur automation-friendly JSON output de.

### Project requirements

- Input: customer message
- Output: JSON
- Fields: intent, category, priority, sentiment, needs\_human, missing\_information, next\_action, suggested\_reply
- Reply language: Roman Urdu
- Unknown message ke liye clarification ask karni hai

## Suggested workflow

Customer Message

- > AI Classifier Prompt
- > JSON Output
- > Router
- > Correct Action
- > Customer Reply

## Exercises

---

### Exercise 1 - Messages classify karein

Neechay diye gaye messages ko intent, priority, sentiment, aur next\_action ke hisaab se classify karein.

1. Price kya hai?
2. Mera order abhi tak nahi aya.
3. Payment cut gayi lekin confirmation nahi mili.
4. Aap delivery karte hain?
5. Mujhe human agent se baat karni hai.
6. AC service book karwani hai.
7. Product damage mila hai.
8. Sirf details chahiye.

### Exercise 2 - Apna classifier prompt likhein

Ek shoe store ke liye classifier prompt likhein. Store mein common intents yeh hain: price\_inquiry, size\_availability, order\_status, complaint, exchange\_request, human\_support.

### **Exercise 3 - Router plan banayein**

Agar classifier output intent ke hisaab se next action decide kare, to har intent ke liye action define karein.

# Answer Key

## Answer 1 - Sample classifications

| Message                                                 | Intent              | Priority | Sentiment | Next action                |
|---------------------------------------------------------|---------------------|----------|-----------|----------------------------|
| Price kya hai?                                          | price inquiry       | low      | neutral   | Ask product/<br>service    |
| Mera order<br>abhi tak nahi<br>aya.                     | order status        | medium   | negative  | Ask order ID               |
| Payment cut<br>gayi lekin<br>confirmation<br>nahi mili. | complaint           | high     | negative  | Ask payment<br>reference   |
| Aap delivery<br>karte hain?                             | general<br>question | low      | neutral   | Answer<br>delivery policy  |
| Mujhe human<br>agent se baat<br>karni hai.              | human support       | high     | negative  | Human handoff              |
| AC service<br>book karwani<br>hai.                      | new lead            | medium   | neutral   | Collect contact<br>details |
| Product<br>damage mila<br>hai.                          | complaint           | high     | negative  | Ask order ID               |
| Sirf details<br>chahiye.                                | general<br>question | low      | neutral   | Ask<br>clarification       |

## Answer 2 - Shoe store classifier prompt

You are a customer message classifier for an online kids shoes store.  
Return only valid JSON.

Allowed intents:

- price\_inquiry
- size\_availability
- order\_status
- complaint
- exchange\_request
- human\_support
- unknown

Rules:

- If customer asks about size, set intent to size\_availability.
- If customer asks about existing order, set intent to order\_status.
- If customer reports damaged/wrong item, set intent to complaint.
- If customer wants exchange, set intent to exchange\_request.
- If customer asks for human, set needs\_human to true.
- Suggested reply must be in Roman Urdu.

Customer message: "{{customer\_message}}"

Return JSON with:

intent, category, priority, sentiment, needs\_human, missing\_information,  
next\_action, suggested\_reply

## Answer 3 - Router plan

| Intent            | Action                                        |
|-------------------|-----------------------------------------------|
| price_inquiry     | Ask product name/size or share price range    |
| size_availability | Ask shoe model and required size              |
| order_status      | Ask order number                              |
| complaint         | Create complaint ticket and ask order details |
| exchange_request  | Ask order number and exchange reason          |
| human_support     | Notify team and send handoff message          |
| unknown           | Ask clarification                             |

## Chapter Recap

### Is chapter mein hum ne seekha

- Customer message classification automation ka important decision step hai.
- Intent customer ke purpose ko describe karta hai.
- Priority se urgent cases identify hotay hain.
- Sentiment se reply ka tone improve hota hai.
- Structured JSON output automation workflows ke liye best hota hai.
- Human handoff aur missing information rules prompt ka part hone chahiye.

**Upgrade challenge:** Apne classifier mein confidence score add karein. Agar confidence low ho to bot direct action na le, balkay customer se clarification ask kare.

# Data Extraction with AI

Is chapter mein aap seekhein ge ke customer messages, emails, forms, aur documents se useful details nikal kar clean JSON, Google Sheet, CRM, ya automation workflow ke liye ready data kaise banaya jata hai.

## Chapter 6 ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- AI data extraction ka concept samajhna.
- Classification aur extraction ka difference explain karna.
- Customer message se name, phone, service, budget, location, date, order ID aur important fields extract karna.
- Structured JSON extraction prompt likhna.
- Missing information aur validation rules handle karna.
- Extracted data ko Google Sheets/CRM format mein convert karna.



## 6.1 Data Extraction Kya Hoti Hai?

---

Data extraction ka simple matlab hai kisi message, email, form, PDF, ya document se useful information nikalna. AI automation mein data extraction bohot important hai, kyun ke business ko sirf text reply nahi chahiye hota, balkay structured data chahiye hota hai jo system save, search, filter, aur process kar sake.

Example ke taur par customer message karta hai:

Mera naam Ali hai. Mujhe DHA Lahore mein AC service chahiye. Budget 5000 tak hai. Phone 03001234567.

AI is message se useful fields extract kar sakta hai:

```
{  
  "customer_name": "Ali",  
  "phone": "03001234567",  
  "service": "AC service",  
  "location": "DHA Lahore",  
  "budget": "5000",  
  "intent": "service_request"  
}
```

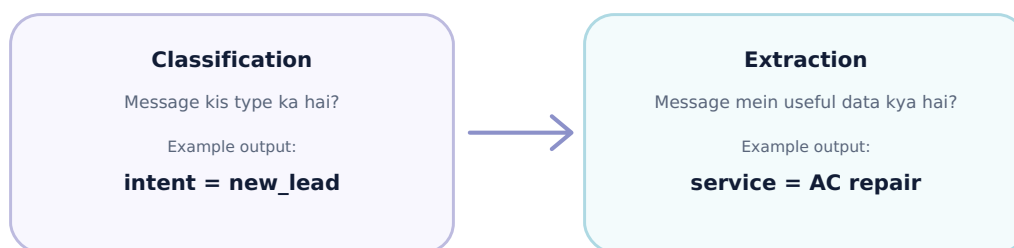
**Simple definition:** Data extraction ka kaam free text ko structured fields mein convert karna hota hai.

## 6.2 Classification vs Extraction

---

Chapter 5 mein hum ne classification seekhi thi. Classification batati hai message kis type ka hai. Extraction message ke andar se actual details nikalti hai. Dono automation mein saath use hotay hain.

**Diagram 6.1 - Classification aur extraction ka difference**



| Step           | Question                            | Example output                                      |
|----------------|-------------------------------------|-----------------------------------------------------|
| Classification | Customer kya chahta hai?            | intent: new_lead                                    |
| Extraction     | Customer ne kaunsi details di hain? | name: Ali, service: AC repair, location: DHA Lahore |
| Action         | System ko kya karna chahiye?        | Lead save karo aur reply bhejo                      |

## 6.3 Automation Mein Data Extraction Kyon Important Hai?

Agar business automation sirf message read kare aur reply de, to kaam aadha hota hai. Real automation tab hoti hai jab AI important details nikal kar business system mein save kare.

### Without extraction

Team ko har message manually read karna parta hai.

Example: Staff customer ka naam, phone, service aur city manually copy karta hai.

### With extraction

AI automatically fields nikal kar sheet/CRM mein save kar deta hai.

Example: New lead automatically Google Sheet mein aa jati hai.

## Common use cases

### Lead capture

Name, phone, service, budget aur location extract karna.

### Order taking

Items, quantity, address aur delivery time extract karna.

### Complaint handling

Issue type, order ID, payment reference aur priority extract karna.

### Appointment booking

Date, time, service type aur contact details extract karna.

### Email automation

Sender need, deadline, company name aur request type extract karna.

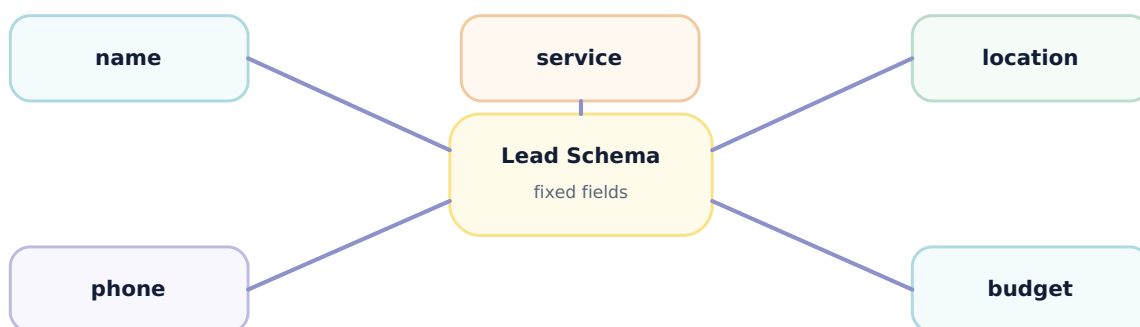
### Document processing

Invoice number, amount, due date aur vendor details extract karna.

## 6.4 Fields Define Karna Sab Se Pehla Step Hai

AI ko extraction prompt dene se pehle yeh decide karna zaroori hai ke humein kaunsi fields chahiye. Agar fields clear nahi hongi to AI output inconsistent ho sakta hai.

Diagram 6.2 - Lead extraction schema



Example lead capture system ke liye fields yeh ho sakti hain:

| Field         | Meaning                            | Required?                                      |
|---------------|------------------------------------|------------------------------------------------|
| customer_name | Customer ka naam                   | Optional initially, required before final lead |
| phone         | Customer ka phone number           | Required                                       |
| service       | Customer ko kaunsi service chahiye | Required                                       |
| location      | Customer ka area/city              | Required for local service                     |
| budget        | Customer ka approximate budget     | Optional                                       |
| timeline      | Customer ko kab chahiye            | Optional                                       |

## 6.5 Required aur Optional Fields

Har field required nahi hoti. Beginner automations mein required aur optional fields ka difference clear hona chahiye.

### Required fields

Wo fields jin ke baghair workflow complete nahi ho sakta.

Example: phone number, service type, delivery address.

### Optional fields

Wo fields jo helpful hain, lekin system un ke baghair bhi start ho sakta hai.

Example: budget, preferred time, notes.

**Important:** Agar required data missing ho to bot ko guess nahi karna chahiye. Bot ko customer se politely missing detail ask karni chahiye.

## 6.6 Clean Extraction Prompt Template

---

Ab hum ek practical prompt banate hain jo customer message se structured data extract karega.

```
You are a data extraction assistant for a small business automation system.
```

```
Your task:
```

```
Extract useful information from the customer message and return only valid JSON.
```

```
Rules:
```

- Do not invent any information.
- If a field is not mentioned, use null.
- Keep phone number exactly as provided.
- If required information is missing, add it in missing\_information.
- Output must be valid JSON only.
- Use Roman Urdu for suggested\_reply.

```
Required fields:
```

- customer\_name
- phone
- service
- location

```
Optional fields:
```

- budget
- timeline
- notes

```
Customer message:
```

```
"{{customer_message}}"
```

```
Return JSON in this format:
```

```
{
  "customer_name": null,
  "phone": null,
  "service": null,
  "location": null,
  "budget": null,
  "timeline": null,
  "notes": null,
  "missing_information": [],
  "is_ready_to_save": false,
  "suggested_reply": ""
}
```

## 6.7 Practical Example 1 - Service Lead

---

Customer message:

---

Assalam o Alaikum, mera naam Usman hai. Mujhe Johar Town Lahore mein website banwani hai. Budget 50,000 tak hai. Mera number 03001112233 hai.

Expected extraction:

```
{
  "customer_name": "Usman",
  "phone": "03001112233",
  "service": "website development",
  "location": "Johar Town Lahore",
  "budget": "50000",
  "timeline": null,
  "notes": "Customer wants a website built.",
  "missing_information": [],
  "is_ready_to_save": true,
  "suggested_reply": "Thank you Usman. Aapki website development inquiry note ho gayi hai. Hamari team aap se jald contact karegi."
}
```

## 6.8 Practical Example 2 - Missing Information

Customer message:

Mujhe AC repair karwani hai.

Expected extraction:

```
{
  "customer_name": null,
  "phone": null,
  "service": "AC repair",
  "location": null,
  "budget": null,
  "timeline": null,
  "notes": "Customer wants AC repair.",
  "missing_information": ["customer_name", "phone", "location"],
  "is_ready_to_save": false,
  "suggested_reply": "Ji, AC repair ke liye please apna naam, phone number aur location share kar dein."
}
```

Is example mein AI ne service extract kar li, lekin name, phone aur location missing hain. Is liye **is\_ready\_to\_save** false hai.

## 6.9 Practical Example 3 - Restaurant Order

---

Customer message:

2 zinger burger, 1 fries aur 2 coke bhej dein. Address Model Town Lahore, House 22. Phone 03214445566.

Expected extraction:

```
{
  "order_items": [
    { "item": "Zinger Burger", "quantity": 2 },
    { "item": "Fries", "quantity": 1 },
    { "item": "Coke", "quantity": 2 }
  ],
  "delivery_address": "House 22, Model Town Lahore",
  "phone": "03214445566",
  "missing_information": [],
  "is_ready_to_confirm": true,
  "suggested_reply": "Aapka order note ho gaya hai. Please confirm kar dein ke address House 22, Model Town Lahore hai."
}
```

## 6.10 Practical Example 4 - Appointment Booking

---

Customer message:

Kal shaam 6 baje dental checkup ki appointment mil sakti hai? Mera naam Sara hai, number 03008889999.

Expected extraction:

```
{
  "customer_name": "Sara",
  "phone": "03008889999",
  "service": "dental checkup",
  "preferred_date": "tomorrow",
  "preferred_time": "6 PM",
  "missing_information": [],
  "is_ready_to_check_availability": true,
  "suggested_reply": "Ji Sara, main kal shaam 6 baje dental checkup ki availability check kar raha hoon."
}
```

## 6.11 Data Validation Ka Concept

Extraction ke baad validation zaroori hoti hai. Validation ka matlab hai check karna ke required data complete hai ya nahi, aur field format usable hai ya nahi.

**Diagram 6.3 - Extraction validation workflow**





## Validation examples

| Field     | Validation rule                       | Example                 |
|-----------|---------------------------------------|-------------------------|
| phone     | Phone missing na ho                   | 03001234567             |
| email     | Email format valid ho                 | ali@example.com         |
| budget    | Number ya range samajh aaye           | 50000, 50k, 50,000      |
| date/time | Ambiguous na ho                       | kal shaam vs exact date |
| location  | Service area ke liye enough detail ho | DHA Lahore Phase 5      |

**Beginner rule:** AI se extracted data ko blindly save na karein. Required fields aur format ko check karna zaroori hai.

## 6.12 Missing Information Handle Karna

AI automation ka acha system missing information ko clearly identify karta hai aur customer se sirf wohi information ask karta hai jo missing ho.

Bad reply:

Please apni details share karein.

Better reply:

Ji, AC repair booking ke liye please apna phone number aur location share kar dein.

Better reply specific hota hai. Customer ko pata hota hai ke kya provide karna hai.

## 6.13 Google Sheets Ready Output

Beginner automations mein Google Sheets sab se simple storage option hota hai. Is liye extracted JSON ko sheet columns ke mutabiq design karna helpful hota hai.

| Sheet column | JSON field    | Example             |
|--------------|---------------|---------------------|
| Created At   | created_at    | 2026-06-30          |
| Name         | customer_name | Usman               |
| Phone        | phone         | 03001112233         |
| Service      | service       | Website development |
| Location     | location      | Johar Town Lahore   |
| Budget       | budget        | 50000               |
| Status       | lead_status   | new                 |

```
{
  "created_at": "2026-06-30",
  "customer_name": "Usman",
  "phone": "03001112233",
  "service": "Website development",
  "location": "Johar Town Lahore",
  "budget": "50000",
  "lead_status": "new"
}
```

## 6.14 Normalization Kya Hoti Hai?

Normalization ka matlab hai extracted data ko consistent format mein convert karna. Customer different style mein same cheez likh sakta hai.

| Customer text | Normalized value    |
|---------------|---------------------|
| 50k           | 50000               |
| pachas hazar  | 50000               |
| Lhr           | Lahore              |
| kal shaam     | tomorrow evening    |
| web bana do   | website development |

Beginner level par aap AI ko normalized fields bhi return karwa sakte hain, lekin sensitive fields jaise phone number ko exactly preserve karna behtar hota hai.

## 6.15 Common Mistakes

### 1. AI ko fields na batana

AI kabhi name dega, kabhi customer\_name, kabhi client\_name. Workflow inconsistent ho jayega.

### 2. Missing data ko null na rakhna

Empty ya invented values automation mein confusion create karte hain.

### 3. AI se guess karwana

Agar customer ne budget nahi diya to AI ko budget assume nahi karna chahiye.

### 4. Phone/email validation ignore karna

Wrong contact save ho gaya to lead useless ho sakti hai.

## 6.16 Mini Project - Lead Details Extractor

Is mini project mein aap ek simple lead extractor design karen ge jo customer message se lead details nikal kar Google Sheet-ready JSON output de.

## Project requirements

- Input: customer message
- Output: valid JSON only
- Required fields: customer\_name, phone, service, location
- Optional fields: budget, timeline, notes
- Missing required fields ko missing\_information mein add karna
- Agar required fields complete hon to is\_ready\_to\_save true karna
- Suggested reply Roman Urdu mein dena

## Suggested workflow

Customer Message

- > AI Data Extractor Prompt
- > JSON Output
- > Validation
- > Google Sheet / CRM
- > Customer Reply

## Exercises

### Exercise 1 - Data extract karein

Neechay diye gaye messages se customer\_name, phone, service, location, budget, timeline aur missing\_information extract karein.

1. Mera naam Ahmed hai. Mujhe Faisal Town Lahore mein AC service chahiye. Number 03005556677.
2. Website banwani hai, budget 80k tak hai, Karachi se hoon.
3. Kal 4 baje haircut appointment chahiye. Mera naam Bilal hai.
4. 2 pizza aur 1 drink deliver kar dein. Address DHA Phase 6, phone 03112223344.
5. Payment ho gayi hai lekin order confirm nahi hua. Order ID 12345.

## Exercise 2 - Apna extraction prompt likhein

Ek clinic ke liye appointment extraction prompt likhein. Required fields: patient\_name, phone, service, preferred\_date, preferred\_time. Optional field: notes.

## Exercise 3 - Google Sheet columns design karein

Ek service business ke liye lead capture sheet ke columns design karein. Kam az kam 8 columns hone chahiye.

# Answer Key

## Answer 1 - Sample extracted data

| Message summary     | Extracted data                                                                     | Missing                  |
|---------------------|------------------------------------------------------------------------------------|--------------------------|
| Ahmed AC service    | Name: Ahmed, Phone: 03005556677, Service: AC service, Location: Faisal Town Lahore | budget, timeline         |
| Website lead        | Service: website development, Location: Karachi, Budget: 80000                     | customer_name, phone     |
| Haircut appointment | Name: Bilal, Service: haircut, Time: tomorrow 4 PM                                 | phone, location          |
| Pizza order         | Items: 2 pizza, 1 drink, Address: DHA Phase 6, Phone: 03112223344                  | customer_name            |
| Payment issue       | Issue: payment done but order not confirmed, Order ID: 12345                       | phone, payment reference |

## Answer 2 - Clinic extraction prompt

You are a clinic appointment data extraction assistant.  
Return only valid JSON.

Extract these required fields:

- patient\_name
- phone
- service
- preferred\_date
- preferred\_time

Optional field:

- notes

Rules:

- Do not invent missing details.
- If a required field is missing, use null and add it in missing\_information.
- If all required fields are available, set is\_ready\_to\_book to true.
- Suggested reply must be in Roman Urdu.

Patient message:

"{{customer\_message}}"

Return JSON:

```
{
  "patient_name": null,
  "phone": null,
  "service": null,
  "preferred_date": null,
  "preferred_time": null,
  "notes": null,
  "missing_information": [],
  "is_ready_to_book": false,
  "suggested_reply": ""
}
```

## Answer 3 - Lead capture sheet columns

| Column        | Purpose                      |
|---------------|------------------------------|
| Created At    | Lead kab aya                 |
| Customer Name | Customer ka naam             |
| Phone         | Contact number               |
| Service       | Required service             |
| Location      | City/area                    |
| Budget        | Approximate budget           |
| Timeline      | Kab service chahiye          |
| Status        | new, contacted, closed, lost |
| Notes         | Extra details                |

## Chapter Recap

### Is chapter mein hum ne seekha

- Data extraction free text ko structured data mein convert karti hai.
- Classification message ka type batati hai, extraction message ki details nikalti hai.
- Extraction se lead capture, order taking, appointment booking aur complaint handling automate hota hai.
- Fields pehle define karna zaroori hai.
- Missing information ko guess nahi karna, customer se ask karna chahiye.
- JSON output Google Sheets, CRM aur backend workflows ke liye useful hota hai.



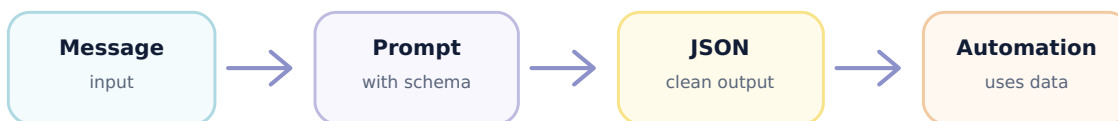
**Upgrade challenge:** Apne extractor prompt mein normalization add karein.

Example: "50k" ko "50000", "Lhr" ko "Lahore", aur "web banwani hai" ko "website development" mein convert karna.

# Structured Output aur JSON

Is chapter mein aap seekhein ge ke AI se clean, predictable, machine-readable output kaise lena hai taake automation tools, Google Sheets, CRM, APIs, aur backend systems us output ko reliably use kar saken.

## Chapter 7 ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Structured output aur normal AI response ka difference samajhna.
- JSON ka basic structure samajhna.
- AI se clean JSON output lene ke liye prompt likhna.
- Required fields, optional fields, null values, arrays, aur nested objects use karna.
- Broken JSON aur inconsistent output ke common issues fix karna.
- Classification aur data extraction ko JSON format mein combine karna.

## 7.1 Structured Output Kya Hota Hai?

---

Structured output ka matlab hai AI ka jawab aise format mein lena jo predictable, organized, aur machine-readable ho. Normal AI response human ke liye readable hota hai. Structured output software ke liye readable hota hai.

Example ke taur par agar customer message karta hai:

Mera order abhi tak deliver nahi hua. Order number 4589 hai.

AI normal response de sakta hai:

Customer order delivery delay ke bare mein pooch raha hai. Order number 4589 hai.

Lekin automation ke liye better output yeh hoga:

```
{
  "intent": "order_status",
  "order_id": "4589",
  "issue": "delivery_delay",
  "needs_human": false
}
```

**Simple definition:** Structured output AI ke jawab ko fixed fields mein convert karta hai, taake workflow us output ko directly use kar sake.

## 7.2 Automation Mein Structured Output Kyon Zaroori Hai?

---

Agar AI har dafa different style mein jawab de, to automation break ho sakti hai. Kabhi AI paragraph likh de, kabhi bullets, kabhi table, aur kabhi extra explanation. Human ko yeh samajh aa sakta hai, lekin software confuse ho jata hai.

## Unstructured output

AI free-style text likhta hai.

Example: "User wants refund and seems angry."

## Structured output

AI fixed JSON fields return karta hai.

Example: { "intent": "refund\_request",  
"sentiment": "angry" }

### Diagram 7.1 - Normal answer vs automation-ready output

#### Normal AI Answer

Human read kar sakta hai  
Software ke liye hard



#### Structured JSON

Fields fixed hoti hain  
Workflow directly use karta hai

## 7.3 JSON Kya Hai?

JSON ka full form JavaScript Object Notation hai. Simple words mein JSON ek lightweight data format hai jo fields aur values ki form mein information store karta hai. APIs, webhooks, automation tools, backend systems, and AI workflows mein JSON bohot common hai.

```
{  
  "customer_name": "Ali",  
  "phone": "03001234567",  
  "service": "AC repair",  
  "priority": "medium"  
}
```

Is example mein left side fields hain aur right side values hain.

| JSON Part | Meaning                          | Example            |
|-----------|----------------------------------|--------------------|
| Key       | Field ka naam                    | "customer_name"    |
| Value     | Field ki value                   | "Ali"              |
| Object    | Curly braces ke andar data group | { ... }            |
| Array     | List of values                   | ["pizza", "fries"] |

## 7.4 JSON Ke Basic Rules

JSON simple hai, lekin is ke kuch rules strict hain. Agar ek comma ya quote missing ho, to JSON invalid ho sakta hai.

### Valid JSON rules

- Keys double quotes mein hoti hain.
- String values bhi double quotes mein hoti hain.
- Har key-value pair ke darmiyan colon hota hai.
- Multiple fields ke darmiyan comma hota hai.
- Object curly braces mein hota hai.

### Common mistakes

- Single quotes use karna.
- Last field ke baad extra comma.
- Explanation text JSON ke saath add kar dena.
- Boolean ko string bana dena.
- Required field miss kar dena.

### Valid JSON example

```
{
  "intent": "price_inquiry",
  "service": "website development",
  "budget": null,
  "needs_human": false
}
```

## Invalid JSON example

```
{
  intent: 'price_inquiry',
  service: "website development",
  needs_human: False,
}
```

Upar wala invalid hai kyun ke keys quotes mein nahi, single quotes use ho rahe hain, Python-style `False` hai, aur last field ke baad extra comma hai.

## 7.5 JSON Data Types

JSON mein values different types ki ho sakti hain. AI prompt likhte waqt humein yeh clear batana chahiye ke har field ki value kis type ki hogi.

| Type    | Use                 | Example              |
|---------|---------------------|----------------------|
| String  | Text value          | "Ali"                |
| Number  | Numeric value       | 5000                 |
| Boolean | true ya false       | true                 |
| Null    | Value missing ho    | null                 |
| Array   | List of values      | ["burger", "fries"]  |
| Object  | Nested grouped data | { "city": "Lahore" } |

**Important:** Automation mein missing value ke liye empty text se better `null` use karna hota hai. Is se system ko clear signal milta hai ke value available nahi hai.

## 7.6 AI Se JSON Output Lene Ka Basic Prompt

Agar prompt vague hoga, AI extra text bhi likh sakta hai. Is liye prompt mein clear instruction honi chahiye: sirf valid JSON return karo, extra explanation nahi.

Customer message:

"Mujhe Lahore mein website banwani hai. Budget 80000 tak hai. Mera naam Usman hai."

You are an AI data extraction assistant.  
Extract useful information from the customer message.  
Return only valid JSON. Do not add explanation.

Required JSON format:

```
{
  "customer_name": "string or null",
  "city": "string or null",
  "service": "string or null",
  "budget": "number or null",
  "intent": "string",
  "missing_fields": ["field names"]
}
```

Expected output:

```
{
  "customer_name": "Usman",
  "city": "Lahore",
  "service": "website development",
  "budget": 80000,
  "intent": "new_lead",
  "missing_fields": []
}
```

## 7.7 Schema Kya Hota Hai?

Schema ka matlab hai output ka fixed structure. Jab hum AI ko schema dete hain, to hum usay batate hain ke output mein kaunsi fields honi chahiye aur un fields ki value kis type ki honi chahiye.

**Diagram 7.2 - Schema AI ko output structure deta hai**



Good schema ka faida yeh hai ke AI ka output har dafa same shape mein aata hai. Is se Google Sheet columns, database fields, ya API body easily map ho jati hai.

## 7.8 Required Fields aur Missing Fields

Business automation mein har message complete nahi hota. Customer kabhi phone number nahi deta, kabhi address nahi deta, kabhi budget nahi batata. AI ko yeh guess nahi karna chahiye. Missing data ko clearly mark karna chahiye.

Customer message:

"Mujhe AC repair chahiye. Main Johar Town Lahore mein hoon."

Good JSON output:

```
{
  "intent": "service_request",
  "service": "AC repair",
  "location": "Johar Town Lahore",
  "customer_name": null,
  "phone": null,
  "missing_fields": ["customer_name", "phone"]
}
```

Is output se automation samajh jati hai ke next reply mein customer se naam aur phone number poochna hai.



**Rule:** AI ko missing information invent nahi karni chahiye. Agar detail message mein nahi hai, to `null` aur `missing_fields` use karein.

## 7.9 Arrays Kab Use Karte Hain?

Array tab use hota hai jab ek field mein multiple items hon. Restaurant order, product list, selected services, tags, skills, ya multiple complaint issues ke liye arrays useful hoti hain.

Customer message:  
"2 zinger burger, 1 fries aur 3 cold drinks bhej dein."

```
{
  "intent": "place_order",
  "items": [
    {
      "name": "Zinger Burger",
      "quantity": 2
    },
    {
      "name": "Fries",
      "quantity": 1
    },
    {
      "name": "Cold Drink",
      "quantity": 3
    }
  ],
  "missing_fields": ["delivery_address", "phone"]
}
```

Yahan `items` array hai, aur har item ek object hai. Yeh format restaurant order automation ke liye bohot useful hai.

## 7.10 Nested Objects Kab Use Karte Hain?

Nested object tab use hota hai jab data ko groups mein organize karna ho. For example customer details, order details, delivery details, aur payment details ko separate groups mein rakhna.

```
{
  "customer": {
    "name": "Ali",
    "phone": "03001234567"
  },
  "order": {
    "items": ["burger", "fries"],
    "total": null
  },
  "delivery": {
    "address": "Model Town Lahore",
    "preferred_time": "evening"
  }
}
```

### Flat JSON

Small workflows ke liye simple hota hai.

Example: lead capture, email category, basic classification.

### Nested JSON

Complex workflows ke liye better hota hai.

Example: restaurant order, appointment booking, support ticket.

## 7.11 Classification + Extraction Combined JSON

Real automation mein classification aur extraction aksar ek hi output mein hoti hain. Pehle AI intent detect karta hai, phir useful fields extract karta hai, phir next action suggest karta hai.

Customer message:  
"Payment cut gayi lekin order confirm nahi hua. Order ID 8891 hai."

```
{
  "intent": "complaint",
  "category": "payment_issue",
  "priority": "high",
  "sentiment": "frustrated",
  "order_id": "8891",
  "issue_summary": "Payment was deducted but order was not confirmed.",
  "needs_human": true,
  "next_action": "create_support_ticket",
  "missing_fields": []
}
```

Is JSON se automation ticket create kar sakti hai, customer ko acknowledgement bhej sakti hai, aur support team ko notify kar sakti hai.

## 7.12 Practical JSON Prompt Template

Yeh template beginner level automations ke liye useful hai. Aap isay lead capture, customer support, email classification, aur WhatsApp bot planning mein modify kar sakte hain.

You are an AI automation assistant.  
Your job is to analyze the customer message and return structured data.

Rules:

- Return only valid JSON.
- Do not add markdown.
- Do not add explanation.
- If a value is missing, use null.
- Do not invent information.
- Use the exact keys given below.

JSON format:

```
{
  "intent": "new_lead | price_inquiry | complaint | order_status | general_question | human_support",
  "priority": "low | medium | high",
  "sentiment": "positive | neutral | negative",
  "customer_name": "string or null",
  "phone": "string or null",
  "service_or_product": "string or null",
  "location": "string or null",
  "budget": "number or null",
  "summary": "short summary",
  "needs_human": true,
  "missing_fields": []
}
```

Customer message:

```
{{customer_message}}
```

**Important improvement:** Prompt mein allowed values define karne se AI random labels kam banata hai.

## 7.13 Broken JSON Problem

AI kabhi kabhi invalid JSON return kar sakta hai. Beginner automations mein yeh common issue hai. Is ke liye prompt aur workflow dono mein safeguards honi chahiye.

### Problem

- AI explanation add kar deta hai.
- JSON ke bahar text aa jata hai.
- Extra comma aa jata hai.
- Required key missing hoti hai.
- Wrong data type use hoti hai.

### Fix

- Prompt mein "Return only valid JSON" likhein.
- Exact schema dein.
- Allowed values define karein.
- Missing value ke liye null rule dein.
- Workflow mein JSON parse/ validation step add karein.

### Bad output

```
Sure, here is the JSON:
{
  "intent": "complaint",
  "priority": "high",
}
```

### Good output

```
{
  "intent": "complaint",
  "priority": "high"
}
```

## 7.14 JSON Validation Mindset

AI output ko blindly trust nahi karna chahiye. Production ya client automation mein output validate karna zaroori hota hai. Beginner level par bhi aapko validation mindset develop karna chahiye.

**Diagram 7.3 - Safe structured output flow**



- Kya output valid JSON hai?
- Kya required keys present hain?
- Kya allowed values follow ho rahi hain?
- Kya phone/email format reasonable hai?
- Kya missing fields null hain?
- Kya AI ne data invent to nahi kiya?

## 7.15 Example: Google Sheet Ready JSON

Google Sheets automation ke liye simple flat JSON best hota hai kyun ke har key ko column banaya ja sakta hai.

Customer message:

"Salam, mujhe apne restaurant ke liye WhatsApp order bot chahiye. Budget 1 lakh tak hai. Main Lahore se Bilal bol raha hoon."

```
{
  "lead_date": "2026-06-30",
  "customer_name": "Bilal",
  "business_type": "restaurant",
  "service_required": "WhatsApp order bot",
  "city": "Lahore",
  "budget": 100000,
  "lead_quality": "high",
  "next_follow_up": "ask for phone number",
  "phone": null,
  "missing_fields": ["phone"]
}
```

| Sheet column     | JSON key         | Example value      |
|------------------|------------------|--------------------|
| Customer Name    | customer_name    | Bilal              |
| Business Type    | business_type    | restaurant         |
| Service Required | service_required | WhatsApp order bot |
| City             | city             | Lahore             |
| Budget           | budget           | 100000             |

## 7.16 Mini Project - Customer Message to JSON Classifier

Is mini project mein aap ek prompt design karen ge jo customer message ko JSON mein convert karega. Yeh output lead capture, customer support, aur CRM automation mein use ho sakta hai.

## Mini Project Requirements

Prompt aisa hona chahiye jo customer message se yeh fields return kare:

- intent
- priority
- sentiment
- customer\_name
- phone
- service\_or\_product
- location
- summary
- needs\_human
- missing\_fields

## Suggested Solution

You are a customer message classification and extraction assistant.

Return only valid JSON.

Do not include markdown or explanation.

If information is missing, use null.

Do not guess missing information.

Allowed intents:

new\_lead, price\_inquiry, complaint, order\_status, appointment\_request,  
general\_question, human\_support

Allowed priority values:

low, medium, high

Allowed sentiment values:

positive, neutral, negative

Return this exact JSON structure:

```
{
  "intent": "",
  "priority": "",
  "sentiment": "",
  "customer_name": null,
  "phone": null,
  "service_or_product": null,
  "location": null,
  "summary": "",
  "needs_human": false,
  "missing_fields": []
}
```

Customer message:

```
{{customer_message}}
```



## 7.17 Exercises

---

### Exercise 1 - JSON identify karein

Neechay message ko JSON mein convert karein:

Mera naam Ahmed hai. Mujhe Karachi mein e-commerce website chahiye. Budget 150000 hai.

### Answer 1

```
{
  "customer_name": "Ahmed",
  "city": "Karachi",
  "service": "e-commerce website",
  "budget": 150000,
  "intent": "new_lead",
  "missing_fields": ["phone"]
}
```

### Exercise 2 - Missing fields handle karein

Is message mein missing fields identify karein:

Mujhe AC repair chahiye urgently.

## Answer 2

```
{
  "intent": "service_request",
  "service": "AC repair",
  "urgency": "urgent",
  "customer_name": null,
  "phone": null,
  "location": null,
  "missing_fields": ["customer_name", "phone", "location"]
}
```

## Exercise 3 - Restaurant order JSON

Is order ko JSON array format mein likhein:

1 large pizza, 2 zinger burgers aur 2 drinks deliver kar dein.

## Answer 3

```
{
  "intent": "place_order",
  "items": [
    {
      "name": "Large Pizza",
      "quantity": 1
    },
    {
      "name": "Zinger Burger",
      "quantity": 2
    },
    {
      "name": "Drink",
      "quantity": 2
    }
  ],
  "missing_fields": ["delivery_address", "phone"]
}
```

## Exercise 4 - Broken JSON fix karein

Is invalid JSON ko correct karein:

```
{  
  intent: 'complaint',  
  "priority": "high",  
  "needs_human": True,  
}
```

## Answer 4

```
{  
  "intent": "complaint",  
  "priority": "high",  
  "needs_human": true  
}
```

## 7.18 Common Mistakes

### Mistake

- AI se paragraph response lena.
- Prompt mein exact schema na dena.
- Missing fields ko ignore karna.
- AI se data guess karwana.
- JSON parse/validation step na rakhna.

### Better approach

- Return only valid JSON instruction dein.
- Allowed values list karein.
- Null aur missing\_fields rule use karein.
- Output ko workflow mein validate karein.
- Small examples se prompt test karein.

## 7.19 Chapter Recap

---

### Is chapter mein hum ne seekha

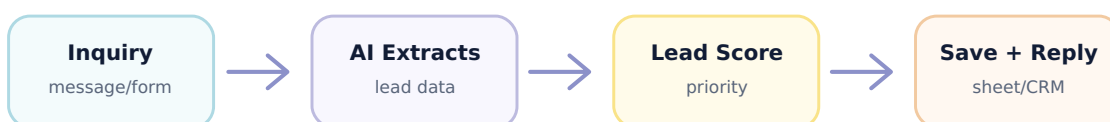
- Structured output AI response ko automation-ready banata hai.
- JSON APIs, workflows, Google Sheets, CRMs, aur backend systems ke liye useful format hai.
- JSON mein keys, values, objects, arrays, booleans, numbers, strings, aur null values hoti hain.
- AI ko exact schema dena zaroori hai.
- Missing information ko guess nahi karna chahiye; null aur missing\_fields use karna chahiye.
- Broken JSON avoid karne ke liye prompt rules aur validation dono zaroori hain.

**Upgrade challenge:** Apne kisi real business idea ke liye JSON schema design karein. Example: restaurant order bot, clinic appointment bot, e-commerce support bot, ya lead capture automation.

# Lead Capture Automation

Is chapter mein aap seekhein ge ke website form, WhatsApp message, social media inquiry, ya email ko AI ke zariye lead mein convert karke organized format mein kaise save karna hai.

## Chapter 8 ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Lead capture automation ka business purpose samajhna.
- Lead source, lead fields, lead status, aur lead priority define karna.
- AI se customer inquiry se useful lead data extract karwana.
- Google Sheets ya Airtable ke liye clean lead table design karna.
- Auto reply prompt banana jo customer ko professional jawab de.
- Mini lead capture system ka practical workflow design karna.

## 8.1 Lead Capture Automation Kya Hoti Hai?

---

Lead capture automation ka matlab hai kisi potential customer ki inquiry ko automatically collect, understand, organize, aur save karna. Jab koi person aapke business se contact karta hai, price poochta hai, service detail mangta hai, ya demo request karta hai, to wo lead ban sakta hai.

Manual process mein business owner ya team member message parhta hai, customer ka naam aur phone copy karta hai, sheet update karta hai, phir reply karta hai. Automation mein yeh kaam system automatically kar sakta hai.

**Simple definition:** Lead capture automation customer inquiry ko structured lead record mein convert karti hai aur business ko fast follow-up mein help karti hai.

## 8.2 Lead Kya Hota Hai?

---

Lead wo person hota hai jo aapke product ya service mein interest show karta hai. Har message lead nahi hota, lekin har useful business inquiry ko lead samajh kar track karna chahiye.

### Strong lead

Customer ne service, location, budget, ya phone number share kiya ho.

Example: "DHA Lahore mein website chahiye, budget 80k hai."

### Weak lead

Customer sirf general information pooch raha ho aur serious intent clear na ho.

Example: "Details?" ya "Price?"

| Customer message                                                   | Lead type | Reason                                          |
|--------------------------------------------------------------------|-----------|-------------------------------------------------|
| Website banwani hai, price bata dein.                              | Medium    | Service interest clear hai, budget missing hai. |
| Restaurant ke liye WhatsApp bot chahiye, Lahore mein business hai. | High      | Use case aur business type clear hai.           |
| Hi                                                                 | Low       | Intent clear nahi.                              |
| Kal tak AC technician chahiye, Model Town location hai.            | High      | Urgency aur location clear hai.                 |

## 8.3 Manual Lead Process vs Automated Lead Process

Lead capture ka manual process slow hota hai. Agar business ko daily 20, 50, ya 100 messages aate hain, to important leads miss ho sakti hain. Automated process speed, consistency, aur tracking improve karta hai.

**Diagram 8.1 - Manual vs automated lead capture**

### Manual Process

1. Message read
2. Details copy
3. Sheet update
4. Reply write

### Automated Process

1. Message received
2. AI extracts data
3. Sheet/CRM updated
4. Auto reply sent

## 8.4 Lead Capture System Ke Basic Parts

Beginner level par lead capture system ko 5 simple parts mein samjha ja sakta hai:

### 1. Source

Lead kahan se aa rahi hai? Website form, WhatsApp, email, Facebook, Instagram, ya landing page.

### 2. AI Extractor

AI message se name, phone, service, location, budget, aur urgency extract karta hai.

### 3. Storage

Extracted data Google Sheets, Airtable, CRM, ya database mein save hota hai.

### 4. Auto Reply

Customer ko professional confirmation ya next question automatically send hota hai.

### 5. Notification

Business owner ya sales team ko new lead alert milta hai.

### 6. Follow-up

Agar customer reply nahi karta, to later follow-up reminder ya message send hota hai.

## 8.5 Lead Fields Kaise Define Karte Hain?

---

Automation build karne se pehle yeh decide karna zaroori hai ke lead record mein kaun kaun se fields honge. Agar fields clear na hon, to AI output inconsistent ho sakta hai.



| Field            | Purpose                       | Example             |
|------------------|-------------------------------|---------------------|
| lead_source      | Lead kahan se aayi            | WhatsApp            |
| customer_name    | Customer ka naam              | Ali Khan            |
| phone            | Contact number                | 03001234567         |
| service_interest | Kis service mein interest hai | Website development |
| location         | Customer ka area/city         | Lahore              |
| budget           | Estimated budget              | 100000              |
| urgency          | Kitni jaldi chahiye           | urgent              |
| lead_priority    | High, medium, low             | high                |
| next_action      | Agla step                     | ask_for_call_time   |

## 8.6 Google Sheets Lead Table

Beginner ke liye Google Sheets lead storage ka sab se easy option hai. Is se aap leads ko rows mein save kar sakte hain aur simple follow-up tracking bhi kar sakte hain.

Date | Source | Name | Phone | Service | Location | Budget | Priority | Status | Next Action | Notes

Recommended statuses:

new contacted qualified proposal\_sent won lost

**Practical tip:** Google Sheet mein pehle columns manually define kar lein. Phir AI output ko same columns ke according generate karwayein.

## 8.7 AI Lead Extraction Prompt

Lead capture automation ka core part AI extraction prompt hota hai. Yeh prompt AI ko batata hai ke message se kaun si information nikalni hai aur kis JSON format mein output dena hai.

```
You are a lead extraction assistant.  
Read the customer message and extract lead information.  
Return only valid JSON. Do not add explanation.
```

Required JSON fields:

```
{  
  "is_lead": true or false,  
  "customer_name": string or null,  
  "phone": string or null,  
  "service_interest": string or null,  
  "location": string or null,  
  "budget": string or null,  
  "urgency": "low" | "medium" | "high" | "unknown",  
  "lead_priority": "low" | "medium" | "high",  
  "missing_fields": [],  
  "next_action": string,  
  "short_summary": string  
}
```

### Example input

Mujhe restaurant ke liye WhatsApp order bot chahiye. Lahore mein restaurant hai. Price bata dein.

### Expected output

```
{  
  "is_lead": true,  
  "customer_name": null,  
  "phone": null,  
  "service_interest": "WhatsApp order bot for restaurant",  
  "location": "Lahore",  
  "budget": null,  
  "urgency": "unknown",  
  "lead_priority": "medium",  
  "missing_fields": ["customer_name", "phone", "budget"],  
  "next_action": "ask for name, phone number, and basic requirements",  
  "short_summary": "Customer needs a WhatsApp order bot for a restaurant in Lahore."  
}
```

## 8.8 Lead Priority Rules

Har lead equal nahi hoti. AI se lead priority assign karwana useful hota hai taake sales team pehle important leads par focus kare.

| Priority | Rules                                                              | Example                                      |
|----------|--------------------------------------------------------------------|----------------------------------------------|
| High     | Customer ne urgent need, location, phone, ya budget share kiya ho. | "Kal tak AC technician chahiye, Model Town." |
| Medium   | Service interest clear ho, lekin details missing hon.              | "Website banwani hai, price?"                |
| Low      | Intent unclear ho ya sirf casual message ho.                       | "Hi, details send."                          |

Lead priority rules:

- high: clear service + urgency OR phone provided OR budget provided
- medium: clear service but missing important details
- low: unclear intent, casual inquiry, or no business requirement

## 8.9 Auto Reply Prompt

Lead extract hone ke baad customer ko auto reply dena chahiye. Reply short, polite, aur next-step focused hona chahiye. Beginner automation mein reply ko direct send karne ke bajaye draft bhi banaya ja sakta hai.

You are a polite sales assistant.

Based on the extracted lead data, write a short Roman Urdu reply.

Rules:

- Keep it under 3 sentences.
- Thank the customer.
- Ask only for missing important information.
- Do not sound robotic.
- If phone is missing, ask for phone number.
- If requirement is unclear, ask one clarifying question.

## Example extracted data

```
{
  "service_interest": "WhatsApp bot for restaurant",
  "location": "Lahore",
  "missing_fields": ["customer_name", "phone", "budget"]
}
```

## Reply

Ji, restaurant WhatsApp bot ke liye hum aapki help kar sakte hain. Please apna naam, phone number, aur basic requirement share kar dein taake hum aapko proper estimate de saken.

## 8.10 Full Beginner Workflow

Ab hum complete beginner lead capture workflow design karte hain. Is workflow ko aap Make.com, Zapier, n8n, ya custom backend mein implement kar sakte hain.

**Diagram 8.2 - Beginner lead capture automation**



1. Customer website form fill karta hai ya WhatsApp message send karta hai.
2. Automation tool message ko AI prompt ke paas bhejta hai.
3. AI lead data JSON mein extract karta hai.
4. Google Sheet ya CRM mein new row create hoti hai.
5. Customer ko auto reply ya reply draft generate hota hai.
6. Sales team ko notification milti hai.

## 8.11 Example: Website Development Lead

---

Customer message:

Salam, mujhe apne clothing brand ke liye website chahiye. Budget around 80k hai. Lahore mein business hai. Call kar sakte hain?

### AI extracted output

```
{
  "is_lead": true,
  "customer_name": null,
  "phone": null,
  "service_interest": "website development for clothing brand",
  "location": "Lahore",
  "budget": "80000",
  "urgency": "unknown",
  "lead_priority": "high",
  "missing_fields": ["customer_name", "phone"],
  "next_action": "ask for name and phone number to schedule a call",
  "short_summary": "Customer needs a website for a clothing brand with around 80k budget in Lahore."
}
```

### Auto reply

Wa Alaikum Assalam, clothing brand website ke liye hum aapki help kar sakte hain. Please apna naam aur phone number share kar dein taake call schedule karke requirements discuss kar saken.

## 8.12 Example: Restaurant Automation Lead

---

Customer message:

Mere restaurant ke liye WhatsApp par auto order taking system chahiye. Menu bhi send ho aur order sheet mein save ho.

## AI extracted output

```
{
  "is_lead": true,
  "customer_name": null,
  "phone": null,
  "service_interest": "WhatsApp auto order taking system for restaurant",
  "location": null,
  "budget": null,
  "urgency": "unknown",
  "lead_priority": "medium",
  "missing_fields": ["customer_name", "phone", "location", "budget"],
  "next_action": "ask for restaurant location, phone number, and menu format",
  "short_summary": "Customer needs WhatsApp order automation with menu sending and order saving."
}
```

## 8.13 Missing Information Handling

Lead capture automation ka important rule yeh hai ke AI missing information ko guess na kare. Agar phone number, budget, ya location message mein nahi hai, to output mein null use kare aur missing\_fields list mein add kare.

### Good behavior

AI missing field ko `null` rakhta hai aur next action mein ask karta hai.

### Bad behavior

AI apni taraf se fake budget, fake location, ya fake customer name create kar deta hai.

If information is not present in the customer message:

- Do not guess.
- Use null.
- Add the field name to missing\_fields.
- Ask for it in next\_action if it is important.

## 8.14 Mini Project: AI Lead Capture Assistant

Is mini project mein aap ek simple lead capture assistant design karein ge jo customer message ko read karega, lead data extract karega, priority assign karega, aur reply generate karega.

## Project requirements

- Input: customer message
- Output 1: JSON lead record
- Output 2: short Roman Urdu reply
- Storage: Google Sheets-ready columns
- Rules: no guessing, missing fields use null, lead priority required

## Step 1 - Define sheet columns

date, source, customer\_name, phone, service\_interest, location, budget, urgency, lead\_priority, status, next\_action, short\_summary

## Step 2 - Use lead extraction prompt

```
Read the customer message and create a lead record.  
Return only JSON.  
Use null if information is missing.  
Assign lead_priority using rules:  
- high if clear need + urgency/budget/phone  
- medium if clear need but missing details  
- low if intent unclear
```

## Step 3 - Generate reply

```
Write a short Roman Urdu reply based on missing_fields and next_action.  
Keep it polite, helpful, and under 3 sentences.
```

## 8.15 Common Mistakes

---

### Mistake 1: Har message ko lead samajhna

Sirf "hi" ya "hello" ko strong lead treat nahi karna chahiye.

### Mistake 2: Too many fields

Beginner system mein 30 columns na banayein. Pehle 10-12 useful fields enough hain.

### Mistake 3: No follow-up status

Agar status field nahi hogi to pata nahi chalega lead contacted hai ya pending.

### Mistake 4: AI guessing

Missing data ko guess karna real business mein confusion create karta hai.

### Exercise 1 - Lead fields design karein

Ek property dealer ke liye Google Sheet columns design karein. Business ko customer ka naam, phone, property type, area, budget, aur urgency track karni hai.

### Answer 1

```
date, source, customer_name, phone, property_type, preferred_area, budget, urgency, lead_priority, status, next_action, notes
```



## Exercise 2 - Customer message extract karein

Message: "Mujhe DHA Lahore mein 5 marla house chahiye. Budget 2 crore tak hai. Call kar lena." Is se JSON lead record banayein.

### Answer 2

```
{
  "is_lead": true,
  "customer_name": null,
  "phone": null,
  "service_interest": "5 marla house purchase",
  "location": "DHA Lahore",
  "budget": "2 crore",
  "urgency": "unknown",
  "lead_priority": "high",
  "missing_fields": ["customer_name", "phone"],
  "next_action": "ask for name and phone number to arrange a call",
  "short_summary": "Customer wants a 5 marla house in DHA Lahore with budget up to 2 crore."
}
```

## Exercise 3 - Auto reply likhein

Upar wali property lead ke liye short Roman Urdu reply likhein.

### Answer 3

Ji, DHA Lahore mein 5 marla house ke options ke liye hum aapki help kar sakte hain. Please apna naam aur phone number share kar dein taake call par details discuss ki ja saken.

## Exercise 4 - Lead priority assign karein

Neechay messages ko low, medium, ya high priority dein:

1. "Hi, details?"
2. "Website banwani hai, price bata dein."
3. "Kal tak AC technician chahiye, Gulberg location hai."

## Answer 4

| Message                                              | Priority | Reason                                   |
|------------------------------------------------------|----------|------------------------------------------|
| Hi, details?                                         | Low      | Intent clear nahi.                       |
| Website banwani hai, price bata dein.                | Medium   | Service clear hai, details missing hain. |
| Kal tak AC technician chahiye, Gulberg location hai. | High     | Urgency aur location clear hai.          |

## Chapter 8 Recap

---

### Is chapter mein aap ne seekha

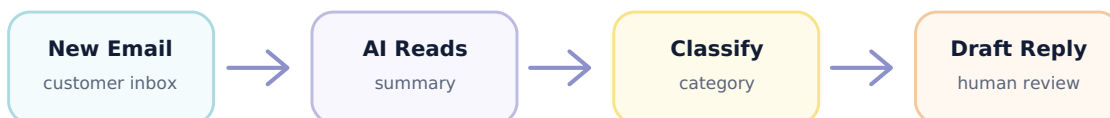
- Lead capture automation customer inquiries ko organized lead records mein convert karti hai.
- Lead source, fields, priority, status, aur next action clear honi chahiye.
- AI lead data extract kar sakta hai, lekin missing data guess nahi karna chahiye.
- Google Sheets beginner lead storage ke liye simple aur useful option hai.
- Auto reply customer ko fast response deta hai aur missing information collect karta hai.
- Lead priority sales team ko important leads pehle handle karne mein help karti hai.

**Upgrade challenge:** Is lead capture system mein follow-up reminder add karein. Agar lead ka status 24 hours tak `new` rahe, to sales team ko reminder notification send ho.

# AI Email Assistant

Is chapter mein aap seekhein ge ke AI ko email summary, category detection, priority, aur professional reply draft ke liye kaise use karna hai.

## Chapter 9 ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Email automation ka beginner-friendly use case samajhna.
- AI se email summary, category, priority, aur sentiment detect karwana.
- Professional reply draft prompt likhna.
- Sales inquiry, support issue, complaint, aur partnership emails handle karna.
- Safe email automation rules define karna taake wrong email send na ho.
- Mini AI email assistant ka workflow design karna.

## 9.1 AI Email Assistant Kya Hota Hai?

---

AI email assistant ek automation system hota hai jo incoming emails ko read karke unka summary, category, priority, aur reply draft generate karta hai. Beginner level par isay direct emails send karne ke liye use nahi karna chahiye. Best approach yeh hai ke AI pehle draft banaye, phir human usay review karke send kare.

**Simple definition:** AI email assistant inbox ko organize karta hai aur reply writing fast banata hai, lekin final send decision human ke paas rehna chahiye.

Businesses mein daily bohot emails aati hain: sales inquiries, complaints, support requests, invoices, spam, partnership offers, aur follow-ups. Agar AI in emails ko quickly categorize kar de, to team ka time save hota hai.

## 9.2 Email Automation Mein AI Ka Role

---

AI ka kaam email ko samajhna aur useful output banana hai. Workflow tool ka kaam email receive karna, AI ko data bhejna, draft save karna, aur notification send karna hota hai.

### AI kya karega?

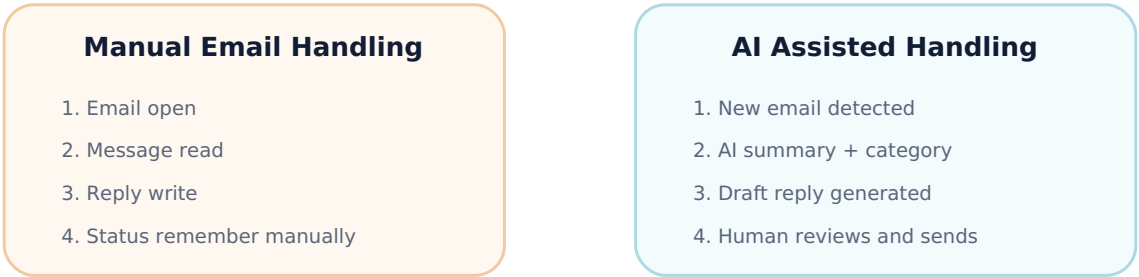
- Email summarize karega
- Intent/category detect karega
- Priority assign karega
- Reply draft karega
- Missing details identify karega

### Automation tool kya karega?

- New email trigger karega
- AI API call karega
- Draft create karega
- Sheet/CRM update karega
- Team ko notify karega

# 9.3 Manual Email Process vs AI Email Assistant

Diagram 9.1 - Email handling process



# 9.4 Email Categories

Email assistant ko useful banane ke liye pehle categories clear honi chahiye. Agar categories vague hon, to AI inconsistent output dega.

| Category        | Meaning                                                 | Example                   |
|-----------------|---------------------------------------------------------|---------------------------|
| sales_inquiry   | Customer product/service price ya detail pooch raha hai | Website package ka price? |
| support_request | Existing user ko help chahiye                           | Login nahi ho raha        |
| complaint       | Customer unhappy hai ya issue report kar raha hai       | Payment deduct ho gayi    |
| partnership     | Collaboration ya business proposal                      | We want to partner        |
| invoice_billing | Payment, invoice, subscription, refund                  | Invoice send kar dein     |
| spam            | Irrelevant, promotional, suspicious                     | Random SEO offer          |

## 9.5 Priority Rules

---

Priority AI email assistant ka important part hai. Har email ka response time same nahi hota.

### High

Payment issue, angry customer, urgent deadline, legal/security issue, ya important client.

### Medium

Sales inquiry, support question, proposal request, demo request.

### Low

General question, newsletter, non-urgent partnership, informational email.

Priority rules:

- high: angry tone, payment issue, urgent deadline, security/legal risk, existing paid customer
- medium: clear business inquiry, support request, demo request
- low: general message, casual information, low urgency, spam-like email

## 9.6 AI Email Summary Prompt

---

Sab se pehle AI ko email ka short summary banana sikhayein. Summary team ko quickly samjha deti hai ke email kis bare mein hai.

You are an email assistant.

Read the email and return a short summary.

Rules:

- Keep summary under 2 sentences.
- Mention the sender's main request.
- Mention any deadline, payment issue, or complaint if present.
- Do not add information that is not in the email.

## Example email

### INCOMING EMAIL

Hi, I purchased your automation guide yesterday but I did not receive the download link. Please check and send it again as soon as possible.

## AI summary

Customer says they purchased the automation guide yesterday but did not receive the download link. They are asking to resend the link as soon as possible.

## 9.7 Email Classification JSON Prompt

Ab summary ke saath category, priority, sentiment, aur required action bhi nikalwana hai. Is ke liye structured JSON prompt best hai.

```
You are an AI email classification assistant.  
Read the email and return only valid JSON.  
Do not add explanation.
```

```
Return this format:
```

```
{  
  "category": "sales_inquiry | support_request | complaint | partnership | invoice_billing |  
spam | other",  
  "priority": "low | medium | high",  
  "sentiment": "positive | neutral | negative",  
  "summary": "short summary",  
  "required_action": "what should be done next",  
  "needs_human_review": true,  
  "missing_information": []  
}
```

```
Rules:
```

- If email is angry or payment-related, priority should be high.
- If important details are missing, add them to missing\_information.
- Never say needs\_human\_review false for outgoing replies.



## 9.8 Example: Support Email

---

### EMAIL

Assalam o Alaikum, mera account login nahi ho raha. Password reset bhi try kiya lekin email receive nahi hui. Please help.

### Expected JSON

```
{
  "category": "support_request",
  "priority": "medium",
  "sentiment": "neutral",
  "summary": "Customer cannot log in and did not receive the password reset email.",
  "required_action": "Check account email and password reset delivery, then guide the customer.",
  "needs_human_review": true,
  "missing_information": ["account email"]
}
```

## 9.9 Example: Complaint Email

---

### EMAIL

I paid for the service but nothing is working. This is very disappointing. Please fix this today or refund my payment.

## Expected JSON

```
{
  "category": "complaint",
  "priority": "high",
  "sentiment": "negative",
  "summary": "Customer paid for the service but says it is not working and is asking for a fix today or a refund.",
  "required_action": "Apologize, ask for account/order details, and escalate to support immediately.",
  "needs_human_review": true,
  "missing_information": ["account email", "order ID or payment reference"]
}
```

## 9.10 Reply Draft Prompt

Email reply prompt ko clear rules deni chahiye. Business reply professional, polite, short, aur action-focused hona chahiye.

You are a professional customer support assistant.  
Write a reply draft based on the email classification and summary.

Rules:

- Use polite Roman Urdu with simple English business terms where needed.
- Keep the reply under 5 sentences.
- Acknowledge the customer's issue.
- Ask only for missing information if required.
- Do not promise a refund, discount, or final decision unless the email says it is approved.
- Do not send the email; only create a draft for human review.

## Draft reply for complaint example

Assalam o Alaikum, inconvenience ke liye sorry. Please apna account email aur payment/order reference share kar dein taake hum issue immediately check kar saken. Hamari team isay priority par review karegi aur aapko update degi.

## 9.11 Sales Inquiry Reply Example

---

### EMAIL

Hi, I need an AI chatbot for my e-commerce store. It should answer product questions and collect leads. Can you share pricing?

### Classification

```
{
  "category": "sales_inquiry",
  "priority": "medium",
  "sentiment": "neutral",
  "summary": "Customer needs an AI chatbot for an e-commerce store to answer product questions and collect leads.",
  "required_action": "Ask for store platform, number of products, and preferred communication channel before sharing estimate.",
  "needs_human_review": true,
  "missing_information": ["store platform", "product count", "preferred channel"]
}
```

### Reply draft

Hi, e-commerce AI chatbot ke liye hum aapki help kar sakte hain. Accurate pricing ke liye please bata dein aapka store Shopify, WooCommerce, ya custom platform par hai, approx kitne products hain, aur bot website chat ke liye chahiye ya WhatsApp ke liye?

## 9.12 Safe Email Automation Rules

---

Email automation sensitive hoti hai. Galat email send hone se client relationship damage ho sakta hai. Beginner level par AI ko direct send permission nahi deni chahiye.

### Safe approach

- AI draft banaye
- Human review kare
- Important cases manually approve hon
- Payment/refund decisions human kare

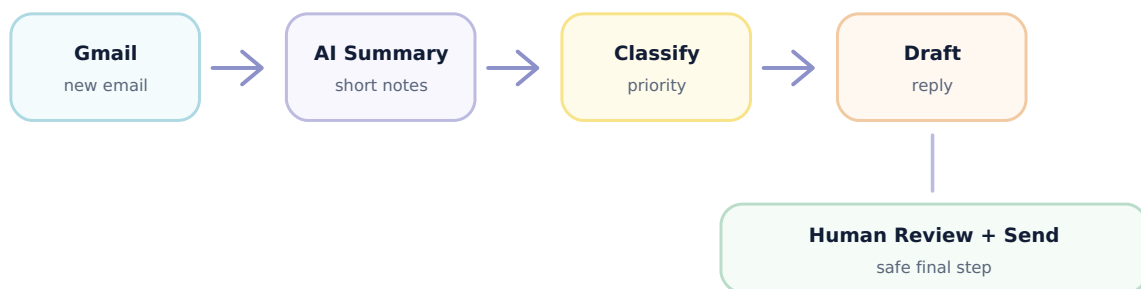
### Risky approach

- AI direct email send kare
- Refund promise kare
- Legal/security matter ka final answer de
- Private data expose kare

**Important:** Beginner system mein AI assistant ko "draft only" mode mein rakhein. Final send button human ke paas hona chahiye.

## 9.13 Full Beginner Workflow

Diagram 9.2 - AI email assistant workflow



1. Gmail ya inbox mein new email receive hoti hai.
2. Automation tool email subject aur body AI ko bhejta hai.
3. AI summary, category, priority, sentiment, aur required action return karta hai.
4. AI reply draft generate karta hai.
5. Draft Gmail mein save hota hai ya team ko send for review hota hai.

6. Human final review ke baad email send karta hai.

## 9.14 Mini Project: AI Email Reply Assistant

Is mini project mein aap ek simple AI email assistant design karein ge jo incoming email se summary, category, priority, aur reply draft generate karega.

### Project requirements

- Input: email subject + email body
- Output 1: classification JSON
- Output 2: reply draft
- Rule: direct email send nahi karni
- Rule: refund, legal, security, ya payment issue human review ke bina finalize nahi hoga

### Step 1 - Classification prompt

Read the email and return classification JSON with category, priority, sentiment, summary, required\_action, needs\_human\_review, and missing\_information.

### Step 2 - Reply draft prompt

Use the classification output to write a polite reply draft. Ask for missing information only. Do not promise final decisions.

### Step 3 - Human review

Final step: human checks the draft, edits if needed, then sends the email.

## 9.15 Common Mistakes

---

### Mistake 1: Direct send enable karna

Beginner automation mein AI ko direct email send permission dena risky hai.

### Mistake 2: Long replies

Customer support replies short, clear, aur action-focused honi chahiye.

### Mistake 3: Missing info na poochna

Agar account email ya order ID missing hai, to AI ko woh poochna chahiye.

### Mistake 4: Fake promises

AI ko refund, discount, ya timeline promise nahi karna chahiye jab tak approved na ho.

### Exercise 1 - Email classify karein

Email: "I bought your book but the download link is not working. Please fix it today." Is email ke liye category, priority, sentiment, required action likhein.

## Answer 1

```
{
  "category": "support_request",
  "priority": "high",
  "sentiment": "negative",
  "summary": "Customer bought the book but the download link is not working and wants it fixed today.",
  "required_action": "Ask for purchase email/order reference and resend or fix the download link.",
  "needs_human_review": true,
  "missing_information": ["purchase email", "order reference"]
}
```

## Exercise 2 - Reply draft likhein

Exercise 1 wali email ke liye short Roman Urdu reply draft likhein.

## Answer 2

Sorry, download link issue ke liye maazrat. Please apna purchase email ya order reference share kar dein taake hum link check karke aapko dobara send kar saken.

## Exercise 3 - Sales inquiry handle karein

Email: "I need a WhatsApp chatbot for my restaurant. It should take orders and save them in a sheet. What is the price?" Is ke liye missing information list banayein.

### Answer 3

- Restaurant name
- Location/city
- Menu format
- Approx daily order volume
- WhatsApp Business API ya WhatsApp Web preference
- Budget or expected timeline

### Exercise 4 - Safe automation rule likhein

Email assistant ke liye 5 rules likhein jo wrong email sending se bachayein.

### Answer 4

1. AI sirf draft create kare, direct send na kare.
2. Refund, billing, legal, aur security emails human review mein jayen.
3. Missing information guess na ki jaye.
4. Reply mein fake promises ya guaranteed timelines na hon.
5. Angry customer emails high priority aur human review mein jayen.



## Chapter 9 Recap

---

### Is chapter mein aap ne seekha

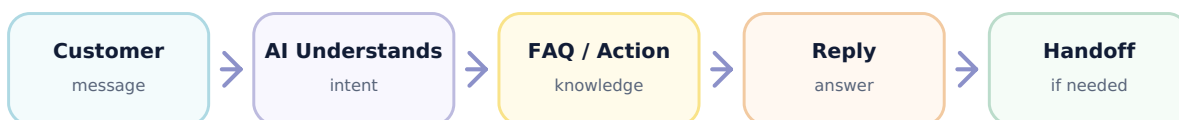
- AI email assistant inbox handling ko faster aur organized banata hai.
- Email summary, category, priority, sentiment, aur required action extract kiye ja sakte hain.
- Reply draft prompt professional aur safe rules ke saath likhna chahiye.
- Payment, refund, angry customer, legal, aur security emails human review ke bina send nahi honi chahiye.
- Beginner automation ka best mode draft-only hai.
- Mini project mein email classification + reply draft + human review workflow build hota hai.

**Upgrade challenge:** AI email assistant mein Google Sheet logging add karein. Har email ka subject, category, priority, summary, aur status sheet mein save ho.

# Basic Customer Support Assistant

Is chapter mein aap seekhein ge ke ek beginner-friendly AI customer support assistant ka flow kaise design hota hai, FAQ replies kaise banaye jate hain, complaints kaise handle hoti hain, aur human handoff kab zaroori hota hai.

## Chapter 10 ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Customer support assistant ka basic purpose samajhna.
- FAQ-based support flow design karna.
- AI ko customer query samajhne aur safe reply dene ke liye prompt dena.
- Complaint, pricing, delivery, refund, aur general queries ke replies plan karna.
- Human handoff rules define karna.
- Mini customer support bot ka complete beginner project design karna.

## 10.1 Customer Support Assistant Kya Hota Hai?

---

Customer support assistant ek AI-powered helper hota hai jo customers ke common sawalat ka jawab de sakta hai, basic problems ko samajh sakta hai, aur zaroorat par human team ko involve kar sakta hai.

Beginner level par iska goal yeh nahi hota ke AI har complex problem khud solve kare. Iska goal yeh hota hai ke AI repetitive support questions ko handle kare aur human team ka workload kam kare.

**Simple definition:** Customer support assistant woh system hai jo customer ka message read karta hai, query type samajhta hai, relevant answer generate karta hai, aur agar issue sensitive ya complex ho to human support ko forward karta hai.

## 10.2 Businesses Ko Support Assistant Ki Zaroorat Kyun Hoti Hai?

---

Small businesses ko daily repeated questions milte hain. Agar same sawal bar bar aata rahe, to staff ka bohot time waste hota hai.

### Common customer questions

- Price kya hai?
- Delivery available hai?
- Order kab milega?
- Refund policy kya hai?
- Location kya hai?
- Timing kya hai?

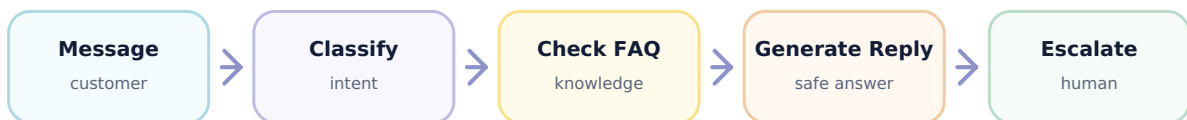
### AI ka benefit

- Instant reply milta hai.
- Staff ka workload kam hota hai.
- Lead miss nahi hoti.
- Support response consistent rehta hai.
- Customer experience improve hota hai.

Agar ek online store ko daily 100 messages aate hain aur un mein se 60 messages same FAQ type ke hain, to AI assistant un 60 messages ka first response automatically de sakta hai.

## 10.3 Customer Support Assistant Ka Basic Workflow

### Basic customer support workflow



Is workflow mein sab se pehle customer ka message receive hota hai. AI message ko classify karta hai. Agar answer FAQ ya business information mein available hai, to AI reply generate karta hai. Agar answer available nahi ya issue sensitive hai, to human handoff hota hai.

## 10.4 Support Assistant Ke Main Components

### 1. Input Channel

Customer kahan se message bhej raha hai: WhatsApp, website chat, email, Facebook, Instagram, ya contact form.

### 2. Intent Classifier

AI yeh samajhta hai ke customer kya chahta hai: price, order status, complaint, refund, ya human support.

### 3. Knowledge Base

Business FAQs, policies, prices, services, timings, delivery areas, aur contact details.

### 4. Reply Generator

AI polite aur useful answer generate karta hai, usually short aur clear language mein.

### 5. Human Handoff

Agar AI confident nahi ya issue complex hai, to message human team ko forward hota hai.

### 6. Conversation Log

Customer ka message, AI ka reply, category, priority, aur status save kiya jata hai.

## 10.5 FAQ-Based Support Assistant

Beginner ke liye sab se easy support assistant FAQ-based hota hai. Ismein aap business ke common questions aur answers pehle se define kar dete hain.

| FAQ Question            | Suggested Answer                                                                                        |
|-------------------------|---------------------------------------------------------------------------------------------------------|
| Delivery available hai? | Ji, delivery available hai. Delivery area aur charges location ke hisab se confirm hote hain.           |
| Price kya hai?          | Ji, price product/service ke hisab se vary karti hai. Please product ya service ka naam share kar dein. |
| Refund policy kya hai?  | Refund policy order type aur issue ke hisab se apply hoti hai. Please apna order number share kar dein. |
| Timing kya hai?         | Hamari support timing 10 AM se 7 PM tak hai. Aap apna message share kar dein, team respond karegi.      |

**Important:** FAQ answers short, clear, aur updated hone chahiye. Agar business policy change ho jaye aur FAQ update na ho, to AI wrong answer de sakta hai.

## 10.6 Support Query Categories

Customer support assistant ko categories clear milni chahiye. Categories jitni clear hongi, automation utni accurate hogi.

| Category       | Meaning                                 | Example Message              | Next Action                          |
|----------------|-----------------------------------------|------------------------------|--------------------------------------|
| price_inquiry  | Customer price pooch raha hai           | AC service ka rate kya hai?  | Product/service detail ask karo      |
| order_status   | Customer order status pooch raha hai    | Mera order kab deliver hoga? | Order ID ask karo                    |
| complaint      | Customer issue report kar raha hai      | Product damaged nikla        | Details collect karo + human handoff |
| refund_request | Customer refund chahta hai              | Mujhe refund chahiye         | Order ID ask karo + policy check     |
| general_info   | Basic business information              | Aapki location kya hai?      | Direct answer do                     |
| human_support  | Customer human se baat karna chahta hai | Agent se baat karwa dein     | Human handoff                        |

## 10.7 Support Assistant Prompt Template

Support assistant ka prompt clear rules ke saath hona chahiye. Prompt mein role, business context, allowed actions, handoff rules, aur output format define hona chahiye.

You are a polite customer support assistant for a small business.

Your job:

1. Read the customer message.
2. Identify the customer's intent.
3. Reply using only the given business information.
4. Keep the reply short, clear, and helpful.
5. If required information is missing, ask one clear follow-up question.
6. If the issue is complaint, refund, angry customer, legal, payment, or human support request, mark `needs_human` as true.

Business information:

- Support timing: 10 AM to 7 PM
- Delivery: Available in selected areas
- Refunds: Need order number and review by support team
- Pricing: Depends on product/service

Return output in JSON:

```
{
  "intent": "",
  "reply": "",
  "needs_human": false,
  "missing_information": [],
  "priority": "low"
}
```

## 10.8 Example: Price Inquiry

### CUSTOMER MESSAGE

AC service ka rate kya hai?

```
{
  "intent": "price_inquiry",
  "reply": "Ji, AC service ka rate service type aur location ke hisab se vary karta hai. Please apna area aur AC ka issue share kar dein taake hum estimate bata saken.",
  "needs_human": false,
  "missing_information": ["area", "AC issue"],
  "priority": "medium"
}
```

Is example mein AI direct fixed price nahi de raha, kyun ke service type aur location missing hain. Yeh safe approach hai.

## 10.9 Example: Order Status Query

---

### CUSTOMER MESSAGE

Mera order abhi tak nahi aya.

```
{
  "intent": "order_status",
  "reply": "Sorry for the delay. Please apna order number share kar dein taake hum delivery status check kar saken.",
  "needs_human": false,
  "missing_information": ["order_number"],
  "priority": "medium"
}
```

Order status ke liye order number zaroori hota hai. Beginner bot ko pehle missing information collect karni chahiye.

## 10.10 Example: Complaint

---

### CUSTOMER MESSAGE

Product damage tha aur koi reply bhi nahi kar raha.

```
{
  "intent": "complaint",
  "reply": "Sorry for the inconvenience. Please apna order number aur damaged product ki photo share kar dein. Main is issue ko support team ko forward kar raha hoon.",
  "needs_human": true,
  "missing_information": ["order_number", "product_photo"],
  "priority": "high"
}
```

Complaint case mein AI ka reply empathetic hona chahiye. Saath hi human handoff true hona chahiye.



## 10.11 Human Handoff Rules

---

Har support bot mein human handoff rules zaroor hone chahiye. AI ko sab kuch solve karne ki permission nahi deni chahiye.

### AI handle kar sakta hai

- Basic FAQs
- Pricing clarification
- Delivery area question
- Timing/location information
- Order number ask karna
- Basic follow-up question

### Human handoff zaroori hai

- Angry customer
- Refund request
- Payment issue
- Legal/privacy issue
- Repeated complaint
- Customer asks for human agent

**Rule:** Jab customer ka paisa, refund, complaint, privacy, ya legal issue involved ho, AI ko final decision nahi dena chahiye. AI sirf details collect kare aur human team ko forward kare.

## 10.12 Support Reply Tone

---

Customer support assistant ka tone polite, short, aur helpful hona chahiye. Reply mein unnecessary long explanation nahi honi chahiye.

| Bad Reply                       | Good Reply                                                                                                 |
|---------------------------------|------------------------------------------------------------------------------------------------------------|
| Wait karein, team check karegi. | Ji, sorry for the delay. Please apna order number share kar dein taake team status check kar sake.         |
| Refund nahi hota.               | Refund request review ke baad process hoti hai. Please apna order number aur issue details share kar dein. |
| Price fixed nahi hai.           | Price service type aur location ke hisab se vary karti hai. Please service detail share kar dein.          |

## 10.13 Support Knowledge Base Ka Structure

Beginner support bot ke liye knowledge base simple table se start ho sakti hai. Aap Google Sheet, Notion, Airtable, ya document use kar sakte hain.

| Field            | Example                                     | Purpose                  |
|------------------|---------------------------------------------|--------------------------|
| topic            | delivery                                    | Question category        |
| question         | Delivery available hai?                     | Common customer question |
| answer           | Delivery selected areas mein available hai. | Approved support answer  |
| handoff_required | false                                       | Human needed or not      |
| last_updated     | 2026-06-30                                  | Freshness tracking       |

## 10.14 Mini Project: Basic Customer Support Bot

Ab hum ek beginner-level support bot ka project design karte hain. Is project mein bot customer ka message classify karega, FAQ answer check karega, reply generate karega, aur zaroorat par human handoff karega.

## Mini project workflow



## Project Requirements

- Input: customer message
- Output: JSON with intent, reply, priority, missing information, needs\_human
- FAQs: pricing, delivery, timing, refund, location
- Handoff: complaints, refund, payment issues, angry customer, human request
- Storage: Google Sheet or Airtable style row

## Sheet Columns

| Column              | Example                                  |
|---------------------|------------------------------------------|
| customer_message    | Mera order late hai                      |
| intent              | order_status                             |
| priority            | medium                                   |
| needs_human         | false                                    |
| missing_information | order_number                             |
| reply               | Please apna order number share kar dein. |
| status              | waiting_for_customer                     |

## 10.15 Practical Prompt for Mini Project

---

You are a beginner-level AI customer support assistant.

Business context:

- Business sells products/services online.
- Delivery is available in selected areas.
- Pricing depends on product/service.
- Refund and payment issues require human support.
- Support timing is 10 AM to 7 PM.

Task:

Read the customer message and return a support decision.

Rules:

- Do not invent prices, policies, delivery dates, or guarantees.
- Ask for missing information when needed.
- Keep reply polite and under 3 sentences.
- If customer is angry, asks for refund, reports payment issue, or asks for human support, set `needs_human` to true.

Return valid JSON only:

```
{
  "intent": "price_inquiry | order_status | complaint | refund_request | general_info |
human_support | unknown",
  "priority": "low | medium | high",
  "sentiment": "positive | neutral | negative",
  "needs_human": true,
  "missing_information": [],
  "reply": "",
  "status": "answered | waiting_for_customer | escalated"
}
```

Customer message:

```
{customer_message}
```

## 10.16 Exercise 1: Classify Support Messages

---

### Exercise

Neechay diye gaye customer messages ko classify karein. Har message ke liye intent, priority, needs\_human, missing\_information, aur reply likhein.

1. Delivery Lahore mein available hai?
2. Mera order 3 din se late hai.
3. Payment deduct ho gayi lekin order confirm nahi hua.
4. Price list bhej dein.
5. Mujhe agent se baat karni hai.

## Answer Key

| Message                                              | Intent        | Priority | Human? | Short Reply                                                                                           |
|------------------------------------------------------|---------------|----------|--------|-------------------------------------------------------------------------------------------------------|
| Delivery Lahore mein available hai?                  | general_info  | low      | false  | Ji, Lahore ke selected areas mein delivery available ho sakti hai. Please apna area share kar dein.   |
| Mera order 3 din se late hai.                        | order_status  | medium   | false  | Sorry for the delay. Please apna order number share kar dein.                                         |
| Payment deduct ho gayi lekin order confirm nahi hua. | complaint     | high     | true   | Sorry for this issue. Please payment screenshot aur contact number share kar dein, team check karegi. |
| Price list bhej dein.                                | price_inquiry | medium   | false  | Ji, please bata dein kis product ya service ki price list chahiye?                                    |
| Mujhe agent se baat karni hai.                       | human_support | medium   | true   | Ji, main aapka message support team ko forward kar raha hoon.                                         |

## 10.17 Exercise 2: Create FAQ Knowledge Base

---

### Exercise

Ek online shoe store ke liye 5 FAQ entries create karein. Har entry mein topic, question, answer, aur handoff\_required include karein.

## Sample Answer

| Topic     | Question                          | Answer                                                                                                   | Handoff |
|-----------|-----------------------------------|----------------------------------------------------------------------------------------------------------|---------|
| size      | Size exchange ho sakta hai?       | Ji, size exchange policy order condition ke hisab se apply hoti hai. Please order number share kar dein. | true    |
| delivery  | Delivery kitne din mein hoti hai? | Delivery usually 3-5 working days mein hoti hai, location ke hisab se time change ho sakta hai.          | false   |
| price     | Shoes ki price kya hai?           | Price design aur size ke hisab se vary karti hai. Please shoe model share kar dein.                      | false   |
| payment   | Cash on delivery hai?             | Ji, selected products aur areas mein cash on delivery available ho sakti hai.                            | false   |
| complaint | Wrong item receive hua.           | Sorry for the inconvenience. Please order number aur item photo share kar dein, team review karegi.      | true    |



## 10.18 Exercise 3: Write Support Bot Rules

---

### Exercise

Apne support bot ke liye 8 rules likhein. Rules mein safe answering, human handoff, missing information, aur tone include karein.

### Sample Answer

1. Bot hamesha polite aur short reply dega.
2. Bot price, refund, delivery date, ya policy invent nahi karega.
3. Agar required detail missing ho to bot one clear question poochega.
4. Payment issue human team ko forward hoga.
5. Refund request human handoff hogi.
6. Angry customer ko empathetic reply milega aur priority high hogi.
7. Bot sirf approved FAQ information use karega.
8. Agar answer unknown ho to bot bolega ke team confirm karegi.

## 10.19 Common Mistakes

---

### Mistake 1: AI ko full control dena

Beginner bots ko refund, payment, legal, ya complaint ka final decision nahi dena chahiye.

### Mistake 2: Outdated FAQs

Agar FAQ update nahi hogi to bot wrong answer de sakta hai.

### Mistake 3: Long replies

Support replies short aur actionable honi chahiye.

### Mistake 4: No handoff

Har support automation mein human handoff zaroori hai.

## 10.20 Chapter Recap

---

### Is chapter mein aap ne seekha

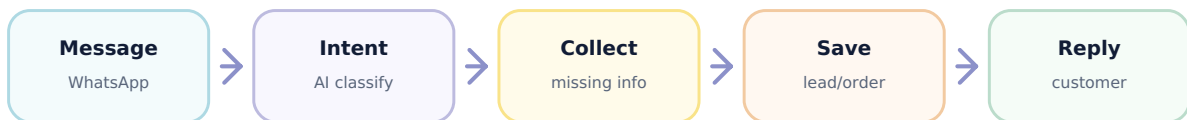
- Customer support assistant repetitive questions handle karta hai.
- FAQ-based support beginner ke liye best starting point hai.
- Support assistant ko intent, priority, sentiment, aur needs\_human detect karna chahiye.
- Complaint, refund, payment, legal, aur angry customer cases human handoff hone chahiye.
- AI ko sirf approved business information use karni chahiye.
- Good support reply short, polite, aur clear next step ke saath hota hai.

**Upgrade challenge:** Apne support bot mein conversation log add karein. Har customer message ke saath date, intent, priority, reply, aur status save karein. Is se business ko pata chalega ke sab se zyada customers kis issue par contact kar rahe hain.

# Basic WhatsApp Automation Planning

Is chapter mein aap seekhein ge ke WhatsApp automation ka beginner-level plan kaise banaya jata hai, message flow kaise design hota hai, customer session ka concept kya hai, aur human handoff ko safe tareeqe se kaise include kiya jata hai.

## Chapter 11 ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- WhatsApp automation ka basic purpose samajhna.
- WhatsApp Business App, WhatsApp Cloud API, aur WhatsApp Web automation ka difference samajhna.
- Basic customer message flow design karna.
- Restaurant, e-commerce, service business, aur appointment use cases plan karna.
- Customer session, memory, follow-up, aur handoff rules define karna.
- Ek beginner-friendly WhatsApp automation plan complete karna.

## 11.1 WhatsApp Automation Kya Hoti Hai?

---

WhatsApp automation ka matlab hai ke customer ke WhatsApp messages ko manually handle karne ke bajaye ek planned system ke zariye receive, understand, process, aur reply kiya jaye.

Beginner level par WhatsApp automation ka goal yeh nahi hota ke aap pehle din se complete AI agent bana dein. Pehla goal yeh hota hai ke aap business ke repetitive messages ko identify karein aur un ke liye simple automated replies, lead capture, order collection, ya support handoff ka plan banayein.

**Simple definition:** WhatsApp automation woh system hai jo customer ke WhatsApp message ko read karta hai, uska purpose samajhta hai, required information collect karta hai, data save karta hai, aur customer ko useful reply deta hai.

## 11.2 Businesses WhatsApp Par Automation Kyun Chahte Hain?

---

Pakistan aur bohot se markets mein customers business se direct WhatsApp par baat karna prefer karte hain. Restaurants, online stores, salons, clinics, property dealers, institutes, repair services, aur local agencies daily WhatsApp messages receive karte hain.

### Common WhatsApp messages

- Price kya hai?
- Menu bhej dein
- Delivery available hai?
- Order confirm kar dein
- Appointment mil sakti hai?
- Mera order late hai

### Automation ka benefit

- Fast reply
- Lead data save hota hai
- Order details structured hoti hain
- Human team ka workload kam hota hai
- Missed messages kam hote hain
- Customer experience better hota hai

**Important:** WhatsApp automation ka real value tab aata hai jab system sirf reply na de, balkay customer se useful information collect kare aur business ke liye record bhi banaye.

## 11.3 WhatsApp Automation Ke 3 Common Approaches

Beginner ko pehle yeh samajhna chahiye ke WhatsApp automation ke multiple approaches hain. Har approach ka use case, cost, reliability, aur risk different hota hai.

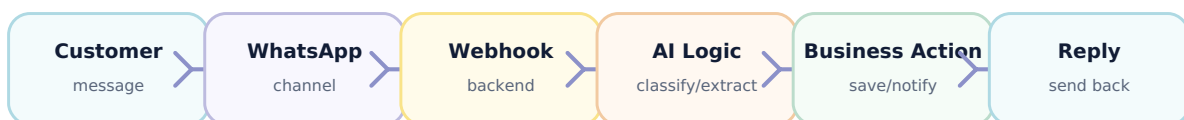
| Approach                | Best For                               | Pros                                       | Limitations                                            |
|-------------------------|----------------------------------------|--------------------------------------------|--------------------------------------------------------|
| WhatsApp Business App   | Very small businesses                  | Easy setup, quick replies, labels, catalog | Limited automation, mostly manual                      |
| WhatsApp Cloud API      | Professional automation                | Official, scalable, safer for business use | Setup, approval, templates, and development required   |
| WhatsApp Web Automation | Testing and small internal experiments | Easy to prototype                          | Risky, unofficial, can break, not ideal for production |

**Professional recommendation:** Real client work ke liye official WhatsApp Cloud API ya approved provider use karna zyada reliable approach hai. WhatsApp Web automation ko production business ke liye carefully evaluate karna chahiye.

## 11.4 Beginner WhatsApp Automation Ka Basic Workflow

WhatsApp automation ka workflow usually customer message se start hota hai aur final response ya human handoff par end hota hai.

### Basic WhatsApp automation workflow



Is flow mein WhatsApp sirf communication channel hai. Real automation backend, AI prompt, database, Google Sheet, CRM, ya workflow tool ke through hoti hai.

## 11.5 WhatsApp Bot Ko Pehle Se Kya Information Chahiye?

---

Ek useful WhatsApp automation banane se pehle business ki basic information collect karni hoti hai. Agar information clear nahi hogi, bot confused reply dega.

### Business information

- Business name
- Products/services
- Pricing rules
- Delivery areas
- Working hours
- Contact person

### Automation information

- Common customer questions
- Required fields
- Handoff rules
- Where data should be saved
- Who gets notifications
- Fallback response

**Rule:** Bot banana start karne se pehle business process likhna zaroori hai. Agar process unclear hai, automation bhi unclear hogi.

## 11.6 WhatsApp Bot Ke Common Intents

---

Intent ka matlab hai customer ka actual purpose. WhatsApp bot ko pehle yeh samajhna hota hai ke customer kya chahta hai.



| Intent              | Meaning                                 | Example Message                | Next Action                     |
|---------------------|-----------------------------------------|--------------------------------|---------------------------------|
| price_inquiry       | Customer price pooch raha hai           | Rate kya hai?                  | Product/service detail ask karo |
| menu_request        | Customer menu dekhna chahta hai         | Menu bhej dein                 | Menu send karo                  |
| place_order         | Customer order dena chahta hai          | 2 burgers aur 1 fries          | Order items extract karo        |
| appointment_request | Customer booking chahta hai             | Kal appointment mil sakti hai? | Date/time/service collect karo  |
| complaint           | Customer issue report kar raha hai      | Order late hai                 | Details collect + human handoff |
| human_support       | Customer human se baat karna chahta hai | Agent se baat karwao           | Human handoff                   |

## 11.7 Required Fields Ka Concept

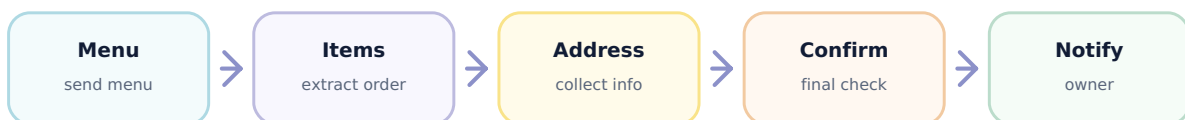
WhatsApp automation mein bot ko pata hona chahiye ke har intent ke liye kaun si information required hai. Jab tak required fields complete na hon, bot ko final action nahi lena chahiye.

| Use Case         | Required Fields                               | Example Follow-up                                     |
|------------------|-----------------------------------------------|-------------------------------------------------------|
| Lead inquiry     | name, phone, service, city                    | Please apna city aur required service share kar dein. |
| Restaurant order | items, quantity, address, phone               | Delivery ke liye please address share kar dein.       |
| Appointment      | name, service, date, time, phone              | Please preferred date aur time confirm kar dein.      |
| Complaint        | order_id, issue, evidence/<br>photo if needed | Please order number aur issue details share kar dein. |

## 11.8 Example: Restaurant WhatsApp Order Flow

Restaurant automation beginners ke liye best example hai, kyun ke ismein customer messages simple aur repetitive hote hain.

### Restaurant order flow



### CUSTOMER

2 zinger burger aur 1 fries chahiye.

```
{
  "intent": "place_order",
  "items": [
    {"name": "Zinger Burger", "quantity": 2},
    {"name": "Fries", "quantity": 1}
  ],
  "missing_information": ["delivery_address", "phone_number"],
  "next_reply": "Ji, aapka order note ho gaya. Please delivery address aur phone number share kar dein."
}
```

Is example mein bot order items samajh gaya, lekin address aur phone number missing hain. Is liye bot final order confirm nahi karega jab tak missing details complete na hon.

## 11.9 Example: Service Business Lead Flow

Service businesses, jaise AC repair, cleaning, marketing agency, software agency, ya consulting business, WhatsApp par lead receive kar sakte hain.

## CUSTOMER

Mujhe ecommerce store ke liye chatbot banwana hai. Budget 50k tak hai.

```
{
  "intent": "service_inquiry",
  "service": "ecommerce chatbot",
  "budget": "50000 PKR",
  "lead_quality": "high",
  "missing_information": ["name", "phone", "timeline"],
  "next_reply": "Great. Please apna name aur timeline share kar dein taake hum aapko proper proposal guide kar saken."
}
```

Yahan budget aur service clear hain, is liye lead high quality ho sakti hai. Bot ko next step mein name, phone, aur timeline collect karni chahiye.

## 11.10 Customer Session Aur Memory

WhatsApp conversation ek single message se complete nahi hoti. Customer multiple messages bhejta hai. Bot ko conversation ka context maintain karna hota hai.

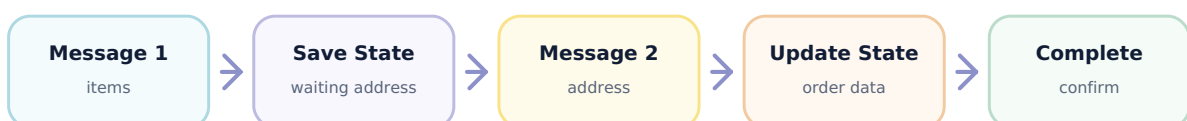
### Without memory

Customer pehle order items bhejta hai, phir address bhejta hai. Bot address ko new unrelated message samajh sakta hai.

### With memory

Bot samajhta hai ke customer pehle order de chuka hai aur ab address missing field complete kar raha hai.

### Simple session memory flow



Beginner level par memory Google Sheet, Airtable, database, ya workflow tool ke temporary storage mein save ho sakti hai.

## 11.11 Human Handoff Rules for WhatsApp

---

WhatsApp bot ko har situation khud handle nahi karni chahiye. Kuch messages human team ko forward hone chahiye.

### Bot handle kar sakta hai

- FAQ questions
- Menu request
- Lead details collection
- Order details collection
- Appointment request
- Basic follow-up

### Human handoff zaroori hai

- Angry customer
- Payment issue
- Refund request
- Legal/privacy concern
- Repeated complaint
- Customer asks for human

**Safe automation rule:** WhatsApp bot customer se details collect kar sakta hai, lekin payment dispute, refund approval, legal claim, ya sensitive decision human team ko handle karna chahiye.

## 11.12 WhatsApp Reply Tone

---

WhatsApp par messages short, polite, aur natural hone chahiye. Long robotic paragraphs customer ko boring ya spammy lag sakte hain.

| Bad Reply                                                                                              | Better Reply                                                                                              |
|--------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Dear customer, your request has been received and will be processed according to our internal process. | Ji, aapki request receive ho gayi. Please apna area share kar dein taake hum next step confirm kar saken. |
| We cannot answer without sufficient information.                                                       | Please product ka naam share kar dein, phir main price guide kar deta hoon.                               |
| Refund request cannot be confirmed by bot.                                                             | Refund request review ke liye please order number share kar dein. Team aapko update karegi.               |

## 11.13 Beginner WhatsApp Bot Prompt Template

Yeh prompt beginner WhatsApp automation planning ke liye useful hai. Aap isay apne use case ke hisab se modify kar sakte hain.

You are a polite WhatsApp assistant for a small business.

Your job:

1. Read the customer's WhatsApp message.
2. Identify the intent.
3. Extract useful details.
4. Check missing required fields.
5. Generate a short Roman Urdu reply.
6. If complaint, payment issue, refund, angry customer, or human request, set needs\_human to true.

Business info:

- Business type: [write business type]
- Services/products: [write list]
- Working hours: [write timing]
- Delivery/coverage area: [write area]

Return JSON only:

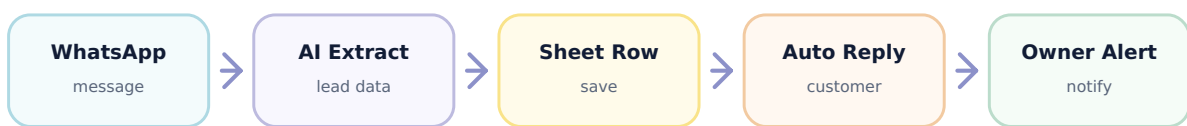
```
{
  "intent": "",
  "extracted_data": {},
  "missing_information": [],
  "reply": "",
  "needs_human": false,
  "priority": "low"
}
```

## 11.14 Mini Project: WhatsApp Lead Capture Bot Plan

---

Ab hum ek beginner mini project plan karte hain. Is project mein bot WhatsApp message receive karega, service inquiry samjhega, details extract karega, missing information ask karega, aur lead ko Google Sheet/CRM ke format mein save karega.

### Mini project flow



### Project ka goal

- Customer message se name, phone, service, city, budget, aur urgency extract karna.
- Missing information ke liye polite follow-up question generate karna.
- Lead priority assign karna.
- Business owner ko alert message ready karna.

## Google Sheet columns

| Column     | Purpose           | Example            |
|------------|-------------------|--------------------|
| created_at | Lead receive time | 2026-06-30 5:00 PM |
| name       | Customer name     | Ali                |
| phone      | WhatsApp number   | 0300...            |
| service    | Required service  | AI chatbot         |
| city       | Customer city     | Lahore             |
| budget     | Approx budget     | 50k                |
| priority   | Lead quality      | high               |
| status     | Next step         | new_lead           |

## 11.15 Exercise 1: Intent Identify Karein

---

### Exercise

Neechay diye gaye WhatsApp messages ke intents identify karein:

1. Menu bhej dein.
2. Mujhe website banwani hai, price kya hoga?
3. Mera order late ho gaya hai.
4. Kal 5 baje appointment mil sakti hai?
5. Agent se baat karwa dein.

### Answer Key

1. menu\_request
2. price\_inquiry ya service\_inquiry
3. complaint ya order\_status
4. appointment\_request
5. human\_support



## 11.16 Exercise 2: Missing Fields Identify Karein

### Exercise

Customer message:

**"Mujhe AC repair chahiye, Model Town mein hoon."**

Is message se extracted data aur missing information likhein.

### Answer Key

```
{
  "intent": "service_request",
  "extracted_data": {
    "service": "AC repair",
    "location": "Model Town"
  },
  "missing_information": ["customer_name", "phone_number", "preferred_time", "AC issue details"],
  "reply": "Ji, AC repair ke liye please apna naam, phone number, preferred time, aur AC ka issue share kar dein.",
  "needs_human": false,
  "priority": "medium"
}
```

## 11.17 Exercise 3: WhatsApp Bot Flow Design Karein

### Exercise

Ek salon ke liye WhatsApp appointment bot ka flow design karein. Bot customer se service, date, time, name, aur phone number collect kare.

## Answer Key

1. Customer message receive.
2. Intent detect: `appointment_request`.
3. Service extract: haircut, facial, manicure, etc.
4. Missing fields check: name, phone, date, time.
5. Bot one clear follow-up question ask kare.
6. Fields complete hon to appointment request save kare.
7. Salon owner ko alert bheje.
8. Customer ko confirmation message bheje.

```
{  
  "intent": "appointment_request",  
  "required_fields": ["customer_name", "phone_number", "service", "preferred_date",  
    "preferred_time"],  
  "final_reply": "Ji, aapki appointment request receive ho gayi hai. Team availability  
confirm karke aapko update karegi.",  
  "needs_human": true  
}
```

## 11.18 Common Mistakes

### Mistake 1: Bot ko sab kuch karwana

Beginner bot ko final refund, legal, payment, ya sensitive decision nahi dena chahiye.

### Mistake 2: Missing fields ignore karna

Order ya lead incomplete ho to bot ko final confirmation nahi deni chahiye.

### **Mistake 3: Long replies**

WhatsApp par short, direct, aur friendly replies zyada better hoti hain.

### **Mistake 4: No handoff**

Har professional WhatsApp bot mein human handoff zaroor hona chahiye.

## **11.19 Chapter Recap**

---

### **Is chapter mein aap ne seekha**

- WhatsApp automation customer messages ko structured process mein convert karti hai.
- WhatsApp Business App basic manual support ke liye useful hai, jab ke Cloud API professional automation ke liye better hai.
- Bot ko intents, required fields, missing information, aur handoff rules clear hone chahiye.
- Customer session aur memory multi-message conversations ke liye important hain.
- WhatsApp replies short, polite, aur action-oriented hone chahiye.
- Beginner level par lead capture, order collection, appointment request, aur FAQ replies best starting points hain.

## 11.20 Upgrade Challenge

---

### Challenge

Ek restaurant ke liye WhatsApp bot ka complete plan banayein:

- 5 intents define karein.
- Har intent ke required fields likhein.
- Human handoff rules define karein.
- Google Sheet columns design karein.
- Customer ko final confirmation message likhein.

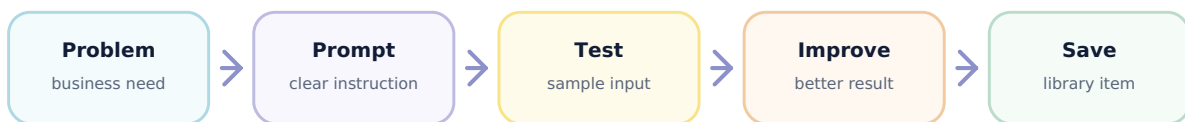
### Suggested Direction

Restaurant ke core intents yeh ho sakte hain: `menu_request`, `place_order`, `delivery_query`, `complaint`, aur `human_support`. Order ke liye required fields: items, quantity, address, phone, payment method. Complaint aur payment issue human handoff mein jayen ge.

# AI Prompt Library

Is project chapter mein aap ek practical AI Prompt Library banayein ge. Yeh library future chapters, client work, freelancing, aur real business automations ke liye reusable asset banegi.

## Prompt library ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Prompt Library ka purpose samajhna.
- Har prompt ko reusable template ki tarah structure karna.
- Customer support, sales, email, complaint, WhatsApp, aur lead capture prompts banana.
- Prompts ko test cases ke saath organize karna.
- Ek complete beginner-level AI Prompt Library create karna.

## 12.1 AI Prompt Library Kya Hoti Hai?

---

AI Prompt Library aik organized collection hoti hai jahan aap useful prompts ko categories ke hisaab se save karte hain. Yeh prompts baad mein repeatedly use ho sakte hain, customize ho sakte hain, aur client projects mein kaam aa sakte hain.

Beginner ke liye prompt library bohot important hai, kyun ke har baar zero se prompt likhna time waste karta hai. Aap ek dafa achi prompt structure bana lein, phir usay different businesses ke liye modify kar sakte hain.

**Simple definition:** Prompt Library woh practical folder, document, sheet, ya Notion page hai jahan aap tested prompts, use cases, input examples, aur expected outputs save karte hain.

## 12.2 Prompt Library Kyun Zaroori Hai?

---

AI automation mein prompts sirf text instructions nahi hote. Prompts business logic ka part ban jate hain. Agar prompt weak hai to automation ka output weak hoga. Agar prompt clear, structured, aur reusable hai to automation stable aur useful ban sakti hai.

### Beginner ke liye benefit

- Har use case ke liye ready starting point milta hai.
- Prompt likhne ka confidence build hota hai.
- Practice ke liye real examples milte hain.
- Learning fast hoti hai.

### Freelancing ke liye benefit

- Client ko fast demo dikhaya ja sakta hai.
- Repeated work reusable ban jata hai.
- Service packages create karna easy hota hai.
- Quality consistent rehti hai.

## 12.3 Prompt Library Ka Best Structure

Achi prompt library mein sirf prompt text save nahi hota. Usmein prompt ka purpose, use case, input example, output format, aur testing notes bhi hotay hain.

| Field         | Kya likhna hai?                       | Example                               |
|---------------|---------------------------------------|---------------------------------------|
| Prompt Name   | Prompt ka short naam                  | Customer Support Reply Prompt         |
| Use Case      | Yeh prompt kis kaam ke liye hai?      | Customer message ka polite reply      |
| Input         | AI ko kya data diya jaye ga?          | Customer message + business details   |
| Output Format | AI se kis format mein result chahiye? | Plain text, JSON, table, bullets      |
| Rules         | AI ko kya avoid karna hai?            | Fake promises na kare, short reply de |
| Test Example  | Sample message jisse prompt test hoga | Price kya hai?                        |

**Important:** Prompt library ko sirf copy-paste collection na banayein. Har prompt ke saath test input aur expected output zaroor save karein.

## 12.4 Prompt Card Template

Har prompt ko ek card ki tarah store karein. Neechay reusable prompt card format diya gaya hai.

## Prompt Card Template

Prompt Name:  
Use Case:  
Best For:  
Input Required:  
Output Format:  
Rules:  
Prompt Text:  
Test Input:  
Expected Output:  
Improvement Notes:

Yeh format Google Docs, Notion, Airtable, Google Sheet, ya simple Markdown file mein use ho sakta hai.

## 12.5 Prompt Categories

Book 1 ke beginner level ke liye aapki prompt library mein kam az kam yeh categories honi chahiye:

### Support

Customer questions, FAQs, complaints, aur human handoff replies.

### Sales

Lead qualification, pricing inquiry, follow-up, aur proposal message.

### Email

Email summary, category, reply draft, aur priority detection.

### WhatsApp

Short natural replies, order flow, appointment flow, and lead capture.

### Data

Name, phone, service, budget, timeline, aur JSON extraction.

### Content

Social captions, product descriptions, blog outlines, and ad scripts.



## 12.6 Prompt 1 - Customer Support Reply

---

Yeh prompt customer ke message ka polite aur helpful reply generate karta hai.

You are a polite customer support assistant for a small business.

Task:

Customer ke message ka short, clear, aur helpful reply Roman Urdu mein likho.

Business context:

Business name: {business\_name}

Service/Product: {service\_or\_product}

Tone: polite, friendly, professional

Rules:

- Reply 2-4 sentences se zyada na ho.
- Agar information missing ho to sirf zaroori follow-up question poochho.
- Fake promise na karo.
- Agar issue serious ho to human team ko involve karne ka mention karo.

Customer message:

{customer\_message}

Output:

Sirf final reply do.

### TEST INPUT

Customer: AC cooling nahi kar raha, technician bhej sakte hain?

### Expected Output

Ji, hum technician arrange kar sakte hain. Please apna area aur contact number share kar dein taake availability check ki ja sake.

## 12.7 Prompt 2 - Lead Qualification

---

Yeh prompt customer lead ko quality ke hisaab se classify karta hai.

You are an AI lead qualification assistant.

Task:

Customer message ko analyze karo aur lead quality classify karo.

Lead quality rules:

- High: customer ne budget, service, location, ya urgent need mention ki ho.
- Medium: customer interested hai lekin details incomplete hain.
- Low: customer sirf general info pooch raha hai.

Return valid JSON only:

```
{
  "intent": "",
  "service_needed": "",
  "budget": "",
  "location": "",
  "lead_quality": "high | medium | low",
  "missing_information": [],
  "next_question": ""
}
```

Customer message:

```
{customer_message}
```

## TEST INPUT

Mujhe ecommerce store ke liye chatbot chahiye, budget 50k tak hai.

```
{
  "intent": "service_inquiry",
  "service_needed": "ecommerce chatbot",
  "budget": "50000 PKR",
  "location": "",
  "lead_quality": "high",
  "missing_information": ["location", "timeline", "contact_number"],
  "next_question": "Please apna city, timeline, aur contact number share kar dein."
}
```

## 12.8 Prompt 3 - Data Extraction

Yeh prompt unstructured customer message se structured data nikalta hai.

You are a data extraction assistant.

Task:

Customer message se useful fields extract karo.

Return valid JSON only:

```
{
  "name": "",
  "phone": "",
  "email": "",
  "service": "",
  "city": "",
  "budget": "",
  "timeline": "",
  "notes": "",
  "missing_fields": []
}
```

Rules:

- Agar field message mein available nahi hai to empty string use karo.
- Guess na karo.
- missing\_fields mein woh fields add karo jo important hain lekin missing hain.

Customer message:

```
{customer_message}
```

## TEST INPUT

Mera naam Ali hai, Lahore se hoon, mujhe website banwani hai, budget 80k hai.

```
{
  "name": "Ali",
  "phone": "",
  "email": "",
  "service": "website development",
  "city": "Lahore",
  "budget": "80000 PKR",
  "timeline": "",
  "notes": "Customer wants a website built.",
  "missing_fields": ["phone", "email", "timeline"]
}
```

## 12.9 Prompt 4 - AI Email Assistant

Yeh prompt incoming email ko summarize, categorize, aur reply draft karne ke liye use hota hai.

You are an email assistant for a business owner.

Task:

Email ko read karo aur neech diye gaye format mein output do.

Return valid JSON only:

```
{
  "summary": "",
  "category": "sales | support | complaint | partnership | spam | other",
  "priority": "high | medium | low",
  "needs_reply": true,
  "reply_draft": ""
}
```

Rules:

- Reply draft polite Roman Urdu mein ho.
- Agar email complaint hai to sorry aur next step mention karo.
- Sensitive ya legal issue ho to human review required mention karo.

Email:

{email\_text}

## 12.10 Prompt 5 - Complaint Summary

Complaint summary prompt support teams ke liye useful hai. Yeh customer ke long message ko short ticket summary mein convert karta hai.

You are a complaint summarization assistant.

Task:

Customer complaint ko short ticket summary mein convert karo.

Return valid JSON only:

```
{
  "complaint_summary": "",
  "category": "payment_issue | delivery_issue | product_issue | service_issue | other",
  "priority": "high | medium | low",
  "customer_mood": "angry | worried | neutral | confused",
  "needs_human": true,
  "suggested_reply": ""
}
```

Customer complaint:

{customer\_message}

### TEST INPUT

Payment deduct ho gayi hai lekin order confirm nahi hua, koi reply bhi nahi kar raha.

```
{
  "complaint_summary": "Customer payment was deducted but order was not confirmed.",
  "category": "payment_issue",
  "priority": "high",
  "customer_mood": "worried",
  "needs_human": true,
  "suggested_reply": "Sorry for the inconvenience. Please apna order number ya payment screenshot share kar dein taake team isay priority par check kar sake."
}
```

## 12.11 Prompt 6 - FAQ Answer Assistant

Yeh prompt business ke FAQs se answer generate karta hai. Beginner level par aap FAQs manually prompt mein provide kar sakte hain.

You are an FAQ assistant.

Task:

Customer ke question ka jawab sirf provided FAQ knowledge se do.

Rules:

- Agar answer FAQ mein available hai to short reply do.
- Agar answer available nahi hai to bolo: "Is information ke liye human team se confirm karna hoga."
- Guess na karo.

FAQ Knowledge:

{faq\_knowledge}

Customer question:

{question}

Output:

Final reply in Roman Urdu.

**Best practice:** FAQ assistant ko kabhi bhi unknown answer invent nahi karna chahiye. Business trust ke liye "I don't know" ka safe version zaroor hona chahiye.

## 12.12 Prompt 7 - WhatsApp Short Reply

WhatsApp par replies short aur natural hone chahiye. Yeh prompt long robotic replies ko avoid karta hai.

You are a WhatsApp reply assistant.

Task:

Customer message ka short Roman Urdu reply likho.

Rules:

- Reply maximum 2 sentences ka ho.
- Natural WhatsApp tone use karo.
- Sirf ek follow-up question poochho.
- Emojis avoid karo unless business specifically allows.
- Fake discounts ya guarantees mention na karo.

Business context:

{business\_context}

Customer message:

{customer\_message}

## 12.13 Prompt 8 - Follow-up Message

Follow-up prompt un leads ke liye useful hai jo pehle interested thay lekin response nahi kar rahe.

You are a sales follow-up assistant.

Task:

Lead ko polite follow-up message likho.

Context:

Lead interest: {lead\_interest}

Previous conversation: {previous\_summary}

Time since last reply: {time\_gap}

Rules:

- Pushy tone na ho.
- Message short ho.
- Clear next step mention karo.
- Roman Urdu use karo.

Output:

Sirf final WhatsApp/message reply do.

### Example Output

Assalam-o-Alaikum, bas follow-up kar raha tha ke kya aap abhi bhi website project discuss karna chahte hain? Agar haan, to main aapko simple package details share kar sakta hoon.

## 12.14 Prompt 9 - Content Ideas Generator

---

AI automation service sell karne ke liye content bhi zaroori hota hai. Yeh prompt social media ideas generate karta hai.

```
You are a content idea assistant for AI automation services.
```

```
Task:
```

```
Given niche ke liye 10 short content ideas generate karo.
```

```
Niche: {niche}
```

```
Target audience: {target_audience}
```

```
Goal: {goal}
```

```
Rules:
```

- Ideas practical hon.
- Har idea 1 line ka ho.
- Roman Urdu style use karo.
- Business benefit clearly show ho.

```
Output format:
```

```
Numbered list.
```

## 12.15 Prompt 10 - Simple Workflow Planner

---

Yeh prompt kisi business problem ko simple automation workflow mein convert karta hai.

You are an AI automation workflow planner.

Task:

Business problem ko beginner-friendly automation workflow mein convert karo.

Input:

Business type: {business\_type}

Problem: {problem}

Tools available: {tools}

Output format:

1. Problem summary
2. Trigger
3. AI task
4. Action
5. Storage
6. Reply/notification
7. Human handoff condition
8. Simple workflow diagram in text

Rules:

- Beginner-friendly language use karo.
- Overcomplicated solution na do.
- Practical tools suggest karo.

#### TEST INPUT

Restaurant ko WhatsApp par orders manually lene mein time lagta hai.

### Expected Planning Direction

Trigger WhatsApp message hoga, AI order items extract karega, missing address/ phone collect karega, order Google Sheet mein save hoga, aur owner ko notification milegi.

## 12.16 Prompt Testing Ka Simple Method

Prompt library tab useful hoti hai jab prompts test kiye gaye hon. Har prompt ko kam az kam 3 sample inputs ke saath test karein.



## Prompt testing cycle



| Test Type        | Purpose                                    | Example                                    |
|------------------|--------------------------------------------|--------------------------------------------|
| Normal input     | Regular customer message test karna        | Price kya hai?                             |
| Incomplete input | Missing information handle karna           | Mujhe service chahiye                      |
| Difficult input  | Angry, unclear, ya long message test karna | Order late hai aur koi reply nahi kar raha |

## 12.17 Mini Project - Apni AI Prompt Library Banao

Ab aap apni first practical AI Prompt Library banayein ge. Is project ke liye aap Google Docs, Google Sheet, Notion, Airtable, ya simple folder use kar sakte hain.

### Project Goal

Ek reusable prompt library create karni hai jisme kam az kam 10 prompts, har prompt ka use case, input example, output format, aur test result saved ho.

### Step-by-step build

1. Ek document ya sheet banayein: **AI Prompt Library - Book 1**.
2. Categories create karein: Support, Sales, Email, WhatsApp, Data, Content.
3. Is chapter ke 10 prompts copy karein.

4. Har prompt mein placeholders identify karein, jaise `{customer_message}`.
5. Har prompt ko ek real test input ke saath run karein.
6. Output ko review karein: kya reply useful, short, aur correct hai?
7. Prompt mein rules improve karein.
8. Final prompt version save karein.

## 12.18 Prompt Library Example Table

| Prompt Name            | Category | Input                      | Output           | Status        |
|------------------------|----------|----------------------------|------------------|---------------|
| Customer Support Reply | Support  | customer_message           | Plain text reply | Ready         |
| Lead Qualification     | Sales    | customer_message           | JSON             | Ready         |
| Data Extraction        | Data     | customer_message           | JSON             | Ready         |
| Email Assistant        | Email    | email_text                 | JSON + draft     | Needs testing |
| WhatsApp Short Reply   | WhatsApp | business_context + message | Short reply      | Ready         |

## 12.19 Common Mistakes

### Mistake 1: Sirf prompt save karna

Agar test input aur expected output save nahi kiya, to baad mein prompt ki quality measure nahi hogi.

### Mistake 2: Output format clear na karna

Automation ke liye output format important hota hai. Plain text, JSON, ya table clearly mention karein.

### **Mistake 3: Rules missing rakhna**

Rules ke baghair AI fake promises, long replies, ya irrelevant answers de sakta hai.

### **Mistake 4: Har business ke liye same prompt**

Base prompt same ho sakta hai, lekin business context customize hona chahiye.

## **12.20 Exercise 1 - Bad Prompt Improve Karein**

---

### **Task**

Neechay diya gaya bad prompt improve karein:

Customer ko reply likho.

Improved prompt mein role, task, context, rules, aur output format include karein.

## Answer Key

You are a polite customer support assistant for an online store.

Task:

Customer ke message ka helpful Roman Urdu reply likho.

Rules:

- Reply 2-3 sentences ka ho.
- Agar order status ka question ho to order number maango.
- Fake delivery time promise na karo.
- Agar customer angry ho to apology include karo.

Customer message:

{customer\_message}

Output:

Sirf final reply do.

## 12.21 Exercise 2 - Prompt Card Fill Karein

### Task

Ek AC repair business ke liye **Lead Qualification Prompt Card** fill karein. Prompt ka purpose yeh hai ke customer message se service, city, urgency, aur missing information detect ho.

## Answer Key

```
Prompt Name: AC Repair Lead Qualification
Use Case: WhatsApp inquiry ko qualified lead mein convert karna
Best For: AC repair/service business
Input Required: customer_message
Output Format: JSON
Rules: Guess na karo, missing information clearly list karo, urgent issue ko high priority do
Test Input: Bhai AC cooling nahi kar raha, Lahore mein technician mil sakta hai?
Expected Output:
{
  "intent": "service_inquiry",
  "service": "AC repair",
  "city": "Lahore",
  "urgency": "medium",
  "lead_quality": "high",
  "missing_information": ["name", "phone", "area"],
  "next_question": "Please apna name, phone number, aur area share kar dein."
}
```

## 12.22 Exercise 3 - Apni 5 Prompts Ki Mini Library

### Task

Apne kisi ek niche ke liye 5 prompts ki mini library banayein. Niche examples: restaurant, online store, clinic, real estate, software agency, AC repair business.

Har prompt ke saath yeh fields fill karein: prompt name, category, input, output, test input.

## Sample Answer - Restaurant

| Prompt Name          | Category | Output                     |
|----------------------|----------|----------------------------|
| Menu Request Reply   | WhatsApp | Short menu reply           |
| Order Item Extractor | Data     | JSON order items           |
| Address Collector    | Support  | Follow-up question         |
| Order Confirmation   | WhatsApp | Final confirmation message |
| Complaint Summary    | Support  | Complaint JSON             |

## 12.23 Chapter Recap

### Is chapter mein aap ne seekha

- Prompt Library AI automation learning ka reusable asset hoti hai.
- Har prompt ko name, use case, input, output, rules, aur test example ke saath save karna chahiye.
- Customer support, lead qualification, data extraction, email assistant, complaint summary, WhatsApp reply, follow-up, content, aur workflow planning prompts beginners ke liye bohot useful hain.
- Prompt testing ke liye normal, incomplete, aur difficult inputs use karne chahiye.
- Prompt library future client demos, freelancing, aur practical automation projects mein directly kaam aa sakti hai.

## 12.24 Upgrade Challenge

---

### Challenge

Apni prompt library ko Google Sheet ya Airtable mein convert karein. Columns banayein:

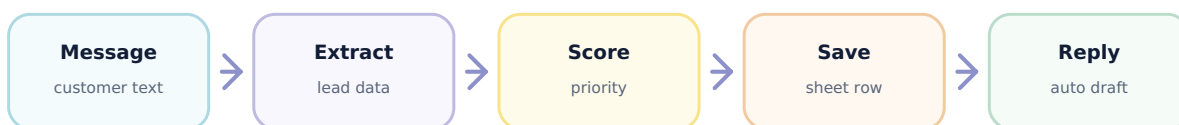
- Prompt Name
- Category
- Use Case
- Input Fields
- Output Format
- Prompt Text
- Test Input
- Expected Output
- Status

Phir 10 prompts ko add karein aur har prompt ko kam az kam 2 test messages ke saath verify karein.

# Lead Capture Assistant

Is project chapter mein aap ek practical Lead Capture Assistant design karenin ge jo customer message se useful lead data extract kare, priority assign kare, Google Sheet-ready output banaye, aur customer ke liye reply draft generate kare.

## Lead Capture Assistant ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Lead Capture Assistant ka purpose samajhna.
- Customer message se name, phone, service, location, budget, aur urgency extract karna.
- Lead ko High, Medium, ya Low priority assign karna.
- Google Sheets ke liye clean row format banana.
- Customer ke liye polite auto reply draft generate karna.
- Ek mini project complete karna jise local business ke demo mein use kiya ja sakta hai.



## 13.1 Lead Capture Assistant Kya Hai?

---

Lead Capture Assistant aik AI-based helper hai jo customer ke message ko read karta hai aur us message mein se business ke liye useful information nikalta hai. Yeh information Google Sheet, CRM, Airtable, database, ya kisi aur system mein save ki ja sakti hai.

Example ke taur par agar customer likhta hai:

Salam, mujhe Lahore mein restaurant ke liye WhatsApp order bot chahiye. Budget 50k tak hai. Mera number 03001234567 hai.

AI assistant is message se yeh data nikal sakta hai:

```
{{
  "name": "",
  "phone": "03001234567",
  "city": "Lahore",
  "service_needed": "WhatsApp order bot for restaurant",
  "budget": "50k",
  "lead_priority": "High",
  "next_action": "Send service details and ask for business name"
}}
```

**Simple idea:** Lead Capture Assistant customer message ko business-ready data mein convert karta hai.

## 13.2 Yeh Project Kyun Important Hai?

---

AI automation services mein lead capture sab se beginner-friendly aur sellable use case hai. Har business ko leads chahiye hoti hain. Agar aap business owner ke customer messages ko automatically organize kar dein, to owner ka time save hota hai aur follow-up improve hota hai.

### Business benefit

- Customer details miss nahi hoti.
- Leads ek jagah save hoti hain.
- Sales team ko fast notification mil sakta hai.
- Follow-up easy ho jata hai.

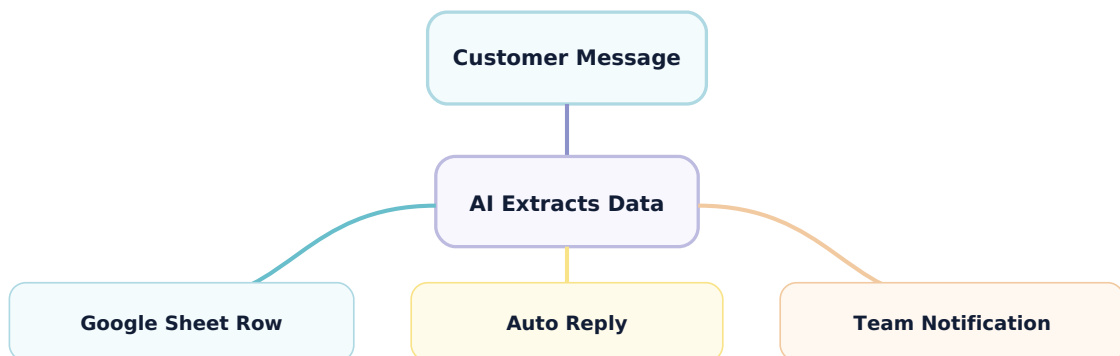
### Beginner benefit

- Project simple hai.
- Coding zaroori nahi.
- Prompt engineering practice hoti hai.
- Client demo ke liye perfect hai.

## 13.3 Lead Capture Assistant Ka Workflow

Is project ka workflow simple hai. Customer message aaye ga, AI usay analyze kare ga, data extract kare ga, priority assign kare ga, aur output structured JSON ya sheet row format mein dega.

### Lead capture workflow



Is project ko aap manually ChatGPT mein bhi test kar sakte hain, aur baad mein Make.com, Zapier, n8n, Google Sheets, ya custom backend ke saath automate kar sakte hain.

## 13.4 Required Lead Fields

Lead capture system banane se pehle yeh decide karna zaroori hai ke humein customer se kaunsi information collect karni hai.

| Field          | Purpose                         | Example              |
|----------------|---------------------------------|----------------------|
| customer_name  | Customer ka naam                | Ali Khan             |
| phone          | Follow-up ke liye number        | 03001234567          |
| email          | Professional communication      | ali@example.com      |
| city           | Location-based service planning | Lahore               |
| service_needed | Customer ko kya chahiye?        | WhatsApp bot         |
| budget         | Lead quality samajhne ke liye   | 50k                  |
| timeline       | Urgency samajhne ke liye        | Is week              |
| lead_priority  | Sales follow-up priority        | High                 |
| missing_fields | Kaunsi details missing hain?    | business name, email |

**Practical tip:** Beginner project mein fields kam rakhein. Zyada fields se system complex aur confusing ho jata hai.

## 13.5 Lead Priority Rules

Har lead equal nahi hoti. Kuch customers serious hote hain, kuch sirf information collect kar rahe hote hain. AI assistant ko lead priority assign karni chahiye.

### High Priority

Customer ne budget, phone, service, aur urgency mention ki ho.  
Example: "Is week setup chahiye, budget 80k hai."

### Medium Priority

Customer interested hai lekin details incomplete hain.  
Example: "WhatsApp bot ki details bhej dein."

### Low Priority

Customer vague hai ya sirf general info pooch raha hai.  
Example: "AI automation kya hoti hai?"

## 13.6 Main Extraction Prompt

---

Ab hum Lead Capture Assistant ka main prompt banate hain. Yeh prompt customer message ko JSON output mein convert karega.

## Lead Capture Extraction Prompt

You are an AI Lead Capture Assistant.

Task:

Customer message ko analyze karo aur lead information extract karo.

Rules:

- Sirf valid JSON return karo.
- Jo information message mein available nahi hai uski value empty string rakho.
- Missing fields ko list mein mention karo.
- Lead priority High, Medium, ya Low mein assign karo.
- Agar customer serious lag raha ho to next\_action clear likho.
- Roman Urdu message ko samajh kar English field values mein clean output do.

Lead priority rules:

High = phone/budget/timeline/service clearly mentioned

Medium = service interest clear hai lekin important details missing hain

Low = vague/general inquiry

Customer message:

{{customer\_message}}

Return JSON in this format:

```
{
  "customer_name": "",
  "phone": "",
  "email": "",
  "city": "",
  "business_type": "",
  "service_needed": "",
  "budget": "",
  "timeline": "",
  "lead_priority": "",
  "missing_fields": [],
  "summary": "",
  "next_action": ""
}
```

## 13.7 Test Example 1 - Service Lead

Customer message:

Assalam o alaikum, mujhe apne restaurant ke liye WhatsApp order taking bot chahiye. Restaurant Lahore mein hai. Budget 60k tak hai aur mujhe aglay week demo chahiye. Mera number 03214445555 hai.

## Expected JSON Output

```
{
  "customer_name": "",
  "phone": "03214445555",
  "email": "",
  "city": "Lahore",
  "business_type": "Restaurant",
  "service_needed": "WhatsApp order taking bot",
  "budget": "60k",
  "timeline": "Next week demo",
  "lead_priority": "High",
  "missing_fields": ["customer_name", "email", "restaurant_name"],
  "summary": "Customer needs a WhatsApp order taking bot for a restaurant in Lahore with a budget of 60k and wants a demo next week.",
  "next_action": "Ask for customer name, restaurant name, and preferred demo time."
}
```

## 13.8 Test Example 2 - Low Detail Lead

Customer message:  
AI chatbot ki price bata dein.

## Expected JSON Output

```
{
  "customer_name": "",
  "phone": "",
  "email": "",
  "city": "",
  "business_type": "",
  "service_needed": "AI chatbot",
  "budget": "",
  "timeline": "",
  "lead_priority": "Medium",
  "missing_fields": ["customer_name", "phone", "business_type", "requirements", "budget", "timeline"],
  "summary": "Customer is asking for AI chatbot pricing but has not shared business details.",
  "next_action": "Ask what type of business they have and what tasks they want the chatbot to handle."
}
```

## 13.9 Auto Reply Prompt

---

Data extract karne ke baad next step customer ko reply dena hai. Reply short, polite, aur useful hona chahiye.

### Auto Reply Draft Prompt

You are a polite sales assistant.

Task:

Lead extraction JSON ke basis par customer ko Roman Urdu mein short reply likho.

Rules:

- Reply 2-4 sentences mein ho.
- Agar important information missing hai to sirf 1-2 follow-up questions poochho.
- Customer ko next step clear batao.
- Overpromise na karo.

Lead JSON:

```
{{lead_json}}
```

Output:

Sirf final customer reply do.

### Example Reply

Wa Alaikum Assalam. Ji, restaurant ke liye WhatsApp order taking bot setup kiya ja sakta hai. Please apna naam, restaurant ka naam, aur preferred demo time share kar dein taake hum aapko next step guide kar saken.

## 13.10 Google Sheet Ready Format

---

Lead data ko Google Sheet mein save karne ke liye columns clear hone chahiye. Neechay beginner-friendly sheet structure diya gaya hai.

| Column         | Example Value             |
|----------------|---------------------------|
| Date           | 2026-06-30                |
| Name           | Ali Khan                  |
| Phone          | 03214445555               |
| City           | Lahore                    |
| Business Type  | Restaurant                |
| Service Needed | WhatsApp order taking bot |
| Budget         | 60k                       |
| Timeline       | Next week                 |
| Priority       | High                      |
| Status         | New                       |
| Next Action    | Schedule demo             |

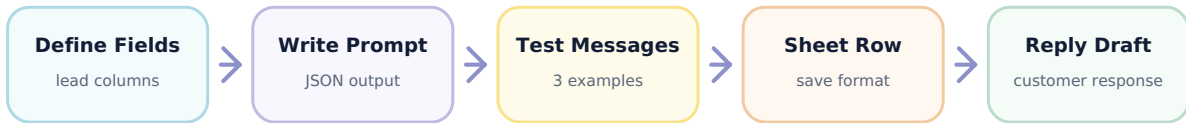
**Status field:** New, Contacted, Demo Scheduled, Proposal Sent, Won, Lost jaisi values use karna helpful hota hai.

## 13.11 Mini Project - Lead Capture Assistant

Ab aap is chapter ka complete mini project build karein. Is project ko aap ChatGPT, Google Docs, Google Sheets, ya Notion mein manually test kar sakte hain. Later, same logic ko Make.com/n8n automation mein convert kiya ja sakta hai.



### Mini project build steps



### Mini Project Requirements

1. Lead fields define karein.
2. Extraction prompt use karein.
3. 3 customer messages test karein.
4. Har message ka JSON output generate karein.
5. Google Sheet row ready karein.
6. Customer ke liye reply draft likhein.

## 13.12 Exercise 1 - Lead Fields Identify Karein

### Task

Ek digital marketing agency ke liye lead capture assistant banana hai. Kaun se 8 fields collect karne chahiye?

## Answer Key

- customer\_name
- phone
- email
- business\_name
- business\_type
- service\_needed
- budget
- timeline
- lead\_priority
- next\_action

## 13.13 Exercise 2 - Customer Message Extract Karein

---

### Task

Is message se JSON output banayein:

Mujhe apni clothing shop ke liye Instagram ads aur WhatsApp chatbot chahiye. Shop Karachi mein hai. Budget 40k hai. Mera naam Sara hai aur number 03005556666.

## Answer Key

```
{
  "customer_name": "Sara",
  "phone": "03005556666",
  "email": "",
  "city": "Karachi",
  "business_type": "Clothing shop",
  "service_needed": "Instagram ads and WhatsApp chatbot",
  "budget": "40k",
  "timeline": "",
  "lead_priority": "High",
  "missing_fields": ["email", "timeline", "shop_name"],
  "summary": "Sara needs Instagram ads and a WhatsApp chatbot for a clothing shop in Karachi with a budget of 40k.",
  "next_action": "Ask for shop name and preferred timeline."
}
```

## 13.14 Exercise 3 - Auto Reply Likhein

### Task

Upar wali clothing shop lead ke liye customer reply likhein.

### Answer Key

Ji Sara, clothing shop ke liye Instagram ads aur WhatsApp chatbot setup ki planning ki ja sakti hai. Please apni shop ka naam aur expected timeline share kar dein taake hum aapko proper next step aur demo plan bata saken.

## 13.15 Common Mistakes

---

### Mistake 1

AI se un fields ki value bharwana jo message mein di hi nahi gayi. Missing information ke liye empty string use karni chahiye.

### Mistake 2

Har lead ko High priority mark kar dena. Priority rules clear honi chahiye.

### Mistake 3

Customer reply bohot lamba likhna. WhatsApp aur lead replies short hone chahiye.

### Mistake 4

Sheet columns define kiye bina automation start kar dena. Pehle data structure fix karein.

## 13.16 Chapter Recap

---

### Is chapter mein aap ne seekha

- Lead Capture Assistant kya hota hai.
- Customer message se lead data kaise extract hota hai.
- Lead priority rules kaise define hoti hain.
- Google Sheet-ready structure kaise banaya jata hai.
- Extraction prompt aur auto reply prompt kaise use hota hai.
- Mini project ke zariye complete beginner-level lead capture system kaise plan hota hai.

## 13.17 Upgrade Challenge

### Challenge

Is Lead Capture Assistant ko next level par le jayein:

1. Ek new field add karein: **source** - WhatsApp, Website, Instagram, Facebook.
2. Ek field add karein: **follow\_up\_date**.
3. Lead priority rules ko improve karein.
4. Google Sheet mein status dropdown plan karein.
5. AI se team notification message bhi generate karwayein.

### Suggested Solution

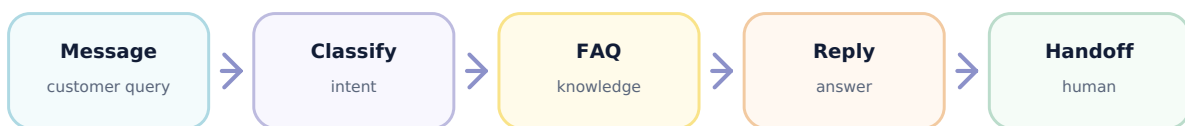
Team notification short aur action-focused honi chahiye:

New High Priority Lead  
Name: Sara  
Phone: 03005556666  
Business: Clothing shop  
City: Karachi  
Need: Instagram ads + WhatsApp chatbot  
Budget: 40k  
Next Action: Ask for shop name and timeline

# Mini Customer Support Bot

Is project chapter mein aap aik beginner-level customer support bot design karen ge jo common questions ka jawab de, missing details collect kare, complaint ko identify kare, aur zaroorat par human handoff suggest kare.

## Mini support bot ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Mini customer support bot ka basic structure samajhna.
- FAQ list aur support categories prepare karna.
- Customer question ko classify karna.
- FAQ se answer generate karna.
- Unknown questions aur complaints ke liye safe response likhna.
- Human handoff rules define karna.
- Ek complete beginner-level support bot mini project banana.

## 14.1 Mini Customer Support Bot Kya Hai?

---

Mini Customer Support Bot aik simple AI assistant hota hai jo customer ke common questions ka jawab deta hai. Iska purpose har cheez automate karna nahi hota. Beginner level par iska goal yeh hota hai ke common questions fast handle ho jayein aur serious issues human team tak pohanch jayein.

Example ke taur par online store ko roz yeh messages aa sakte hain:

- Delivery charges kya hain?
- Order kab deliver hoga?
- Return policy kya hai?
- Product damaged nikla, ab kya karun?
- Mujhe human agent se baat karni hai.

Support bot in messages ko samajh kar reply de sakta hai, details collect kar sakta hai, ya team ko involve kar sakta hai.

**Important:** Support bot ko business ke real rules ke mutabiq jawab dena chahiye. Bot ko guess nahi karna chahiye.

## 14.2 Support Bot Ka Real Business Value

---

Customer support bot ka value simple hai: fast response, organized support, aur team ka workload kam. Agar business owner ko har common question ka manually reply dena parta hai, to time waste hota hai aur customer delay ki wajah se drop bhi kar sakta hai.

### Customer ke liye benefit

- Fast response milta hai.
- Basic information instantly mil jati hai.
- Complaint ka next step clear ho jata hai.
- Human support tak route mil sakta hai.

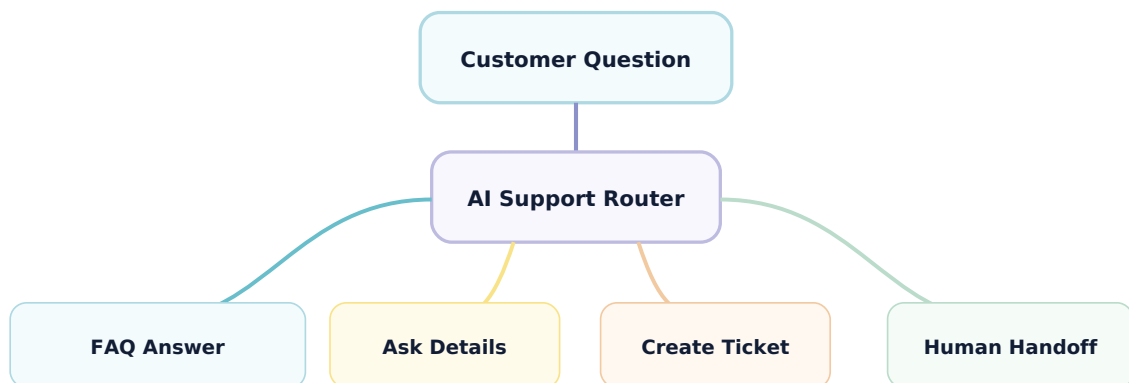
### Business ke liye benefit

- Repeated questions automate hotay hain.
- Support team ka load kam hota hai.
- Customer issues organize hotay hain.
- Lead aur complaint data save ho sakta hai.

## 14.3 Support Bot Ka Workflow

Mini support bot ka workflow zyada complex nahi hona chahiye. Pehle customer message classify hota hai, phir system decide karta hai ke FAQ answer dena hai, details poochni hain, ticket banana hai, ya human handoff karna hai.

### Customer support routing flow



Yeh workflow beginner ke liye perfect hai kyun ke ismein AI se sirf controlled kaam liya ja raha hai: classify, answer, ask, ya handoff.



## 14.4 FAQ List Prepare Karna

Support bot banane se pehle business ki FAQ list prepare karni zaroori hai. FAQ ka matlab hai frequently asked questions. Bot ko answers isi trusted list se dene chahiye.

| FAQ Question                    | Approved Answer                                                                                                                    | Category     |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------|--------------|
| Delivery charges kya hain?      | Lahore mein delivery charges Rs. 200 hain. Other cities ke charges location ke mutabiq vary kar sakte hain.                        | delivery     |
| Delivery time kitna hai?        | Lahore mein usually 1-2 working days, other cities mein 3-5 working days lag sakte hain.                                           | delivery     |
| Return policy kya hai?          | Product receive karne ke 7 din ke andar return request submit ki ja sakti hai, agar product unused aur original condition mein ho. | return       |
| Payment methods kya hain?       | Cash on Delivery, bank transfer, aur online payment available hain.                                                                | payment      |
| Order status kaise check karun? | Please apna order number share karein taake status check kiya ja sake.                                                             | order_status |

**Rule:** FAQ answers short, clear, aur approved honay chahiye. Bot ko unapproved policy invent nahi karni chahiye.

## 14.5 Support Categories Define Karna

Customer messages ko categories mein divide karna support bot ke liye bohot useful hota hai. Categories ki wajah se bot ko samajh aata hai ke kis type ka response dena hai.

### FAQ

General questions  
jinka answer policy/  
FAQ mein available ho.

### Order Status

Customer order  
tracking ya delivery  
update pooch raha ho.

### Complaint

Customer ko damaged  
product, payment  
issue, ya bad  
experience ho.

### Return/Refund

Customer return ya  
refund process pooch  
raha ho.

### Sales Inquiry

Customer product,  
price, package, ya  
service details pooch  
raha ho.

### Human Support

Customer direct  
human agent se baat  
karna chahta ho.

## 14.6 Human Handoff Rules

AI support bot ko har query ka jawab dene ki koshish nahi karni chahiye. Kuch cases mein human support zaroori hota hai.

### Human handoff kab karna chahiye?

- Customer angry ya upset ho.
- Customer refund demand kar raha ho.
- Payment deduct ho gayi ho lekin order confirm na hua ho.
- Customer legal ya sensitive issue mention kare.
- Bot ke paas answer na ho.
- Customer clearly bole: human se baat karni hai.

Handoff response polite hona chahiye:

Sorry for the inconvenience. Main aapki request human support team ko forward kar raha hoon. Please apna order number aur contact number share kar dein taake team aapko jaldi assist kar sake.

## 14.7 Main Support Bot Prompt

Ab hum aik practical prompt banate hain jo FAQ-based mini support bot ke liye use ho sakta hai.

### Mini Customer Support Bot Prompt

You are a polite customer support assistant for a small business.

Goal:

Customer ke message ko samjho, category classify karo, FAQ/policy ke basis par short Roman Urdu reply do, aur agar issue sensitive ho to human handoff suggest karo.

Rules:

- Reply Roman Urdu mein do.
- Reply 2-4 sentences se zyada na ho.
- Agar answer FAQ mein available nahi hai to guess na karo.
- Missing information ho to sirf required details poochho.
- Angry customer ko calm aur respectful tone mein reply do.
- Refund, payment issue, damaged product, ya human request par handoff required mark karo.

FAQ Knowledge Base:

{{faq\_list}}

Customer message:

{{customer\_message}}

Return JSON only:

```
{
  "category": "",
  "intent": "",
  "priority": "Low | Medium | High",
  "needs_human": true,
  "missing_fields": [],
  "reply": ""
}
```

## 14.8 Example 1 - Delivery FAQ

---

### Customer Message

Delivery charges kya hain aur Lahore mein kitne din lagte hain?

### Expected Output

```
{
  "category": "delivery",
  "intent": "delivery_information",
  "priority": "Low",
  "needs_human": false,
  "missing_fields": [],
  "reply": "Lahore mein delivery charges Rs. 200 hain. Delivery usually 1-2 working days
mein ho jati hai."
}
```

## 14.9 Example 2 - Order Status

---

### Customer Message

Mera order abhi tak deliver nahi hua, status check kar dein.

## Expected Output

```
{
  "category": "order_status",
  "intent": "check_order_status",
  "priority": "Medium",
  "needs_human": false,
  "missing_fields": ["order_number"],
  "reply": "Sorry for the delay. Please apna order number share kar dein taake hum delivery status check kar saken."
}
```

## 14.10 Example 3 - Complaint

### Customer Message

Mera product damaged nikla hai. Mujhe refund chahiye.

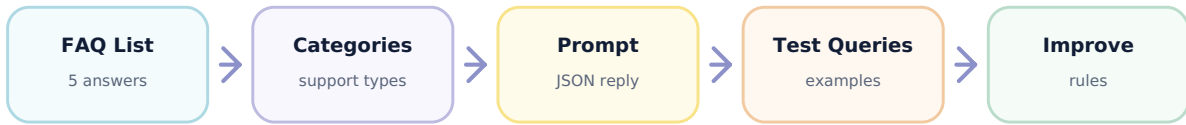
## Expected Output

```
{
  "category": "complaint",
  "intent": "damaged_product_refund_request",
  "priority": "High",
  "needs_human": true,
  "missing_fields": ["order_number", "product_photo"],
  "reply": "Sorry for the inconvenience. Please apna order number aur damaged product ki clear photo share kar dein. Main aapki request human support team ko forward kar raha hoon."
}
```

## 14.11 Mini Project - Customer Support Bot

Ab aap is chapter ka complete mini project build karein. Is project ka goal aik small online store ke liye FAQ-based support bot design karna hai.

### Mini project build steps



### Project Requirements

1. Online store ke liye 5 FAQ questions aur answers likhein.
2. Support categories define karein.
3. Main support bot prompt use karein.
4. 5 customer messages test karein.
5. Har output mein category, priority, needs\_human, missing\_fields, aur reply include karein.

## 14.12 Exercise 1 - FAQ List Banayein

### Task

Ek shoes store ke liye 5 FAQ questions aur approved answers likhein.

## Answer Key

| Question          | Answer                                                                    |
|-------------------|---------------------------------------------------------------------------|
| Delivery time?    | Lahore mein 1-2 days, other cities mein 3-5 days.                         |
| Size exchange?    | Unused shoes 7 days ke andar exchange ho sakte hain.                      |
| COD available?    | Ji, Cash on Delivery available hai.                                       |
| Return policy?    | Return sirf unused product aur original packing ke saath accept hota hai. |
| Delivery charges? | Lahore Rs. 200, other cities location ke mutabiq.                         |

## 14.13 Exercise 2 - Message Classify Karein

### Task

Message: "Mujhe size 38 exchange karwana hai, shoes fit nahi aa rahe." Iska JSON output banayein.

## Answer Key

```
{
  "category": "exchange",
  "intent": "size_exchange_request",
  "priority": "Medium",
  "needs_human": false,
  "missing_fields": ["order_number", "current_size", "required_size"],
  "reply": "Ji, size exchange possible ho sakta hai agar shoes unused aur original packing mein hain. Please apna order number, current size, aur required size share kar dein."
}
```

## 14.14 Exercise 3 - Human Handoff Decide Karein

### Task

Message: "Payment deduct ho gayi lekin order confirm nahi hua. Main bohot upset hoon." Kya bot ko human handoff karna chahiye?

## Answer Key

Yes, human handoff required hai kyun ke payment issue sensitive hai aur customer upset hai.

```
{
  "category": "payment_issue",
  "intent": "payment_deducted_order_not_confirmed",
  "priority": "High",
  "needs_human": true,
  "missing_fields": ["payment_reference", "phone", "order_attempt_time"],
  "reply": "Sorry for the inconvenience. Payment issue ko hum priority par handle karenge. Please payment reference, phone number, aur order attempt time share kar dein; main yeh request human support team ko forward kar raha hoon."
}
```



## 14.15 Common Mistakes

---

### Mistake 1

Bot se un policies ka jawab dena jo business ne approve nahi ki. Support bot ko guess nahi karna chahiye.

### Mistake 2

Har complaint par generic reply dena. Complaint mein priority aur missing fields clear honi chahiye.

### Mistake 3

Human handoff rules define na karna. Sensitive issues AI par leave nahi karne chahiye.

### Mistake 4

Reply bohot lamba likhna. Customer support replies short aur actionable honay chahiye.

## 14.16 Chapter Recap

---

### Is chapter mein aap ne seekha

- Mini Customer Support Bot ka purpose kya hota hai.
- FAQ knowledge base kaise prepare hoti hai.
- Support categories kaise define hoti hain.
- Human handoff rules kyon zaroori hain.
- FAQ-based JSON support prompt kaise likha jata hai.
- Mini project ke zariye online store support bot kaise design hota hai.

## 14.17 Upgrade Challenge

---

### Challenge

Mini support bot ko next level par le jayein:

1. FAQ list ko 10 questions tak expand karein.
2. Conversation history field add karein.
3. Order number extraction add karein.
4. Complaint summary generate karwayein.
5. Human team ke liye internal note generate karwayein.

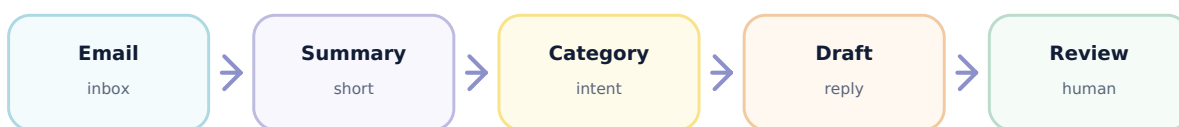
### Suggested Internal Note Format

New High Priority Support Issue  
Category: payment\_issue  
Customer Mood: upset  
Missing Details: payment reference, phone, order attempt time  
Recommended Action: Human support should verify payment and update customer quickly.

# Email Reply Assistant

Is project chapter mein aap aik beginner-level AI Email Reply Assistant design karein ge jo emails ko summarize kare, category detect kare, tone samjhe, aur safe reply draft generate kare.

## Email assistant ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- Email ko short summary mein convert karna.
- Email category, priority, aur sentiment detect karna.
- Sales, support, complaint, aur follow-up emails ke liye reply draft banana.
- Safe email automation rules apply karna.
- Mini project complete karna with exercises aur answer keys.

## 15.1 Email Reply Assistant Kya Hai?

---

Email Reply Assistant aik AI-based helper hota hai jo incoming email ko samajhta hai aur uska professional reply draft karta hai. Iska purpose yeh nahi ke AI bina check kiye har email send kar de. Beginner level par best approach yeh hai ke AI reply draft kare aur human usay review karke send kare.

Business mein emails different types ki hoti hain: sales inquiry, support issue, complaint, partnership request, invoice query, meeting request, refund request, aur general question. Agar har email ka reply manually likhna pare to time bohot lagta hai. AI assistant is process ko fast kar sakta hai.

**Important:** Email automation mein safety bohot zaroori hai. AI ko draft create karne dein, lekin sensitive emails ko human review ke bina send na karein.

## 15.2 Email Assistant Ka Real Business Use

---

Small businesses, freelancers, agencies, e-commerce stores, software companies, clinics, institutes, aur service providers ke liye email assistant bohot useful ho sakta hai.

### Manual process

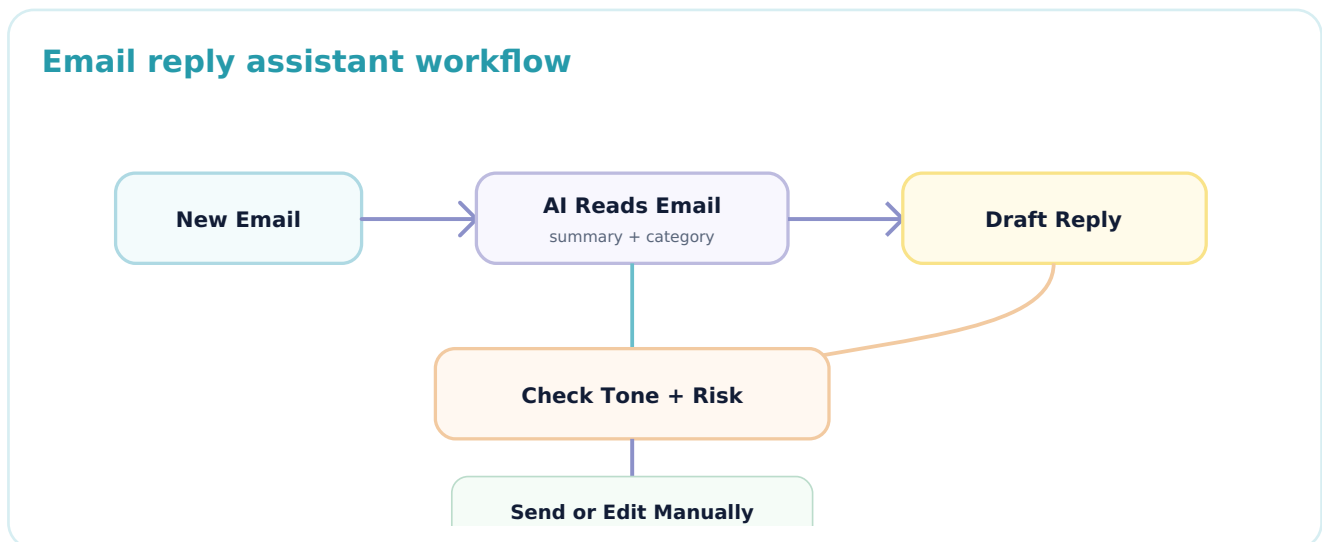
- Email read karna.
- Context samajhna.
- Reply sochna.
- Professional wording likhna.
- Follow-up manually note karna.

### AI-assisted process

- AI email summarize karta hai.
- Category aur priority detect karta hai.
- Reply draft generate karta hai.
- Missing information identify karta hai.
- Human final review karta hai.

## 15.3 Email Assistant Workflow

Beginner email assistant ka workflow simple aur controlled hona chahiye. Pehle email read hoti hai, phir AI summary aur classification banata hai, phir reply draft create hota hai, aur end par human review karta hai.



Is workflow mein AI ko decision support tool banaya gaya hai, complete authority nahi di gayi. Yeh production ke liye safe beginner mindset hai.

## 15.4 Email Classification Fields

Reply generate karne se pehle email classify karna zaroori hai. Classification se pata chalta hai ke email kis type ki hai, kitni urgent hai, aur kya human attention required hai.

| Field          | Meaning                                | Example                                    |
|----------------|----------------------------------------|--------------------------------------------|
| category       | Email ka type                          | sales_inquiry, complaint, support, meeting |
| priority       | Urgency level                          | Low, Medium, High                          |
| sentiment      | Customer ka tone                       | Positive, Neutral, Negative                |
| needs_human    | Kya human review zaroori hai?          | true / false                               |
| missing_fields | Jo details reply ke liye required hain | order_id, phone, preferred_time            |

## 15.5 Email Summary Prompt

### Email Summary Prompt

You are an email assistant.

Task:

Neechay di gayi email ko Roman Urdu mein short summary mein convert karo.

Rules:

- Summary 3 bullet points se zyada na ho.
- Sender ka main request clear karo.
- Agar urgent ya complaint issue hai to mention karo.
- Extra assumptions mat lagao.

Email:

{{email\_text}}

Output:

- Summary:
- Main request:
- Urgency:

## 15.6 Email Classification JSON Prompt

### Email Classification Prompt

You are an AI email classifier for a business inbox.

Classify the email and return valid JSON only.

Rules:

- Do not write explanation outside JSON.
- Priority must be Low, Medium, or High.
- needs\_human should be true for complaints, refunds, angry emails, legal issues, payment issues, and unclear sensitive cases.
- missing\_fields should include required information that is not present.

Email:

{{email\_text}}

Return JSON:

```
{
  "category": "",
  "priority": "Low | Medium | High",
  "sentiment": "Positive | Neutral | Negative",
  "summary": "",
  "reply_goal": "",
  "missing_fields": [],
  "needs_human": false
}
```

## 15.7 Reply Draft Prompt

### Email Reply Draft Prompt

You are a professional email reply assistant.

Task:

Customer email ka polite and helpful reply draft karo.

Tone:

Professional, friendly, clear, and human.

Rules:

- Reply English mein ho, unless user requested Roman Urdu.
- Reply short and direct ho.
- Agar information missing hai to clearly ask for it.
- Agar complaint hai to apologize and explain next step.
- Refund/payment/legal sensitive issue mein final promise mat karo; human review mention karo.
- Do not invent policies or prices.

Business context:

{{business\_context}}

Email:

{{email\_text}}

Classification:

{{classification\_json}}

Output:

Subject: ...

Email Body:

...

## 15.8 Example 1 - Sales Inquiry Email

### Incoming Email

Category expected: sales inquiry

Hello, I am interested in your AI automation service for my restaurant. Can you tell me what you can automate and how much it usually costs?



## Classification Output

```
{
  "category": "sales_inquiry",
  "priority": "Medium",
  "sentiment": "Positive",
  "summary": "Customer restaurant ke liye AI automation service aur pricing details pooch
raha hai.",
  "reply_goal": "explain_service_and_ask_for_call",
  "missing_fields": ["restaurant_name", "current_process", "preferred_call_time"],
  "needs_human": false
}
```

## Reply Draft

Subject: AI Automation for Your Restaurant

Hi,

Thank you for reaching out. We can help automate common restaurant tasks such as WhatsApp replies, menu questions, order collection, customer follow-ups, and staff notifications.

Pricing depends on your current process and the features you need. Please share your restaurant name and a suitable time for a quick call, and I will guide you with the best option.

Best regards,  
Hamza Ali Khalid

## 15.9 Example 2 - Angry Complaint Email

### Incoming Email

Category expected: complaint

I paid for my order yesterday but I still have not received any confirmation. This is very disappointing. Please fix this immediately or refund my money.

## Classification Output

```
{
  "category": "complaint_payment_issue",
  "priority": "High",
  "sentiment": "Negative",
  "summary": "Customer ne payment ki hai lekin order confirmation receive nahi hui. Customer refund ya immediate fix demand kar raha hai.",
  "reply_goal": "apologize_and_collect_order_details",
  "missing_fields": ["order_id", "payment_reference", "customer_phone"],
  "needs_human": true
}
```

## Reply Draft

Subject: We Are Checking Your Order Confirmation

Hi,

I am sorry for the inconvenience. I understand how frustrating this is, and we will check it as soon as possible.

Please share your order ID, payment reference, and phone number so our team can verify the payment and update you with the next step.

Best regards,  
Support Team

**Safety note:** Is case mein AI ko automatic refund promise nahi karna chahiye. Payment aur refund cases human review ke liye mark honay chahiye.

## 15.10 Example 3 - Meeting Request

---

### Incoming Email

Category expected: meeting request

Hi Hamza, I saw your work on AI automation. Can we schedule a meeting next week to discuss a chatbot for our clinic?

### Reply Draft

Subject: Meeting to Discuss Clinic Chatbot

Hi,

Thank you for reaching out. I would be happy to discuss the clinic chatbot idea with you.

Please share two suitable time slots for next week, and also let me know whether you want the chatbot for appointment booking, FAQs, patient inquiries, or all of these.

Best regards,  
Hamza Ali Khalid

## 15.11 Safe Email Automation Rules

### Kya karna hai

- AI se draft banwayein.
- Human review rakhein.
- Missing details poochhein.
- Policies ko business context se match karein.
- Angry emails ko high priority mark karein.

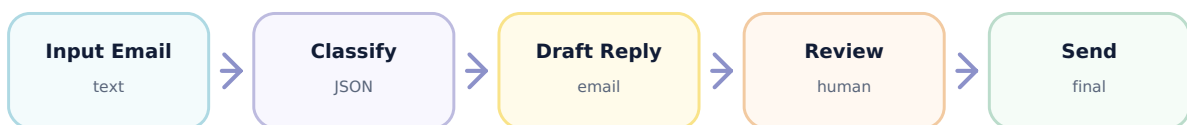
### Kya avoid karna hai

- Refund promise automatically karna.
- Legal advice dena.
- Wrong price ya policy invent karna.
- Private data expose karna.
- Human review ke bina sensitive email send karna.

## 15.12 Mini Project - Email Reply Assistant

Ab aap aik complete beginner-level Email Reply Assistant design karein ge. Yeh assistant email read karega, summary banayega, classification JSON output dega, aur reply draft generate karega.

### Mini project build flow



## Project requirements

- Email text input hoga.
- AI summary generate karega.
- AI category, priority, sentiment, and needs\_human output karega.
- AI reply draft generate karega.
- Human final review karega.

## 15.13 Exercise 1 - Email Classify Karein

### Task

Neechay wali email ko classify karein aur JSON output banayein.

Hello, I want to know if your automation service can connect my website form with Google Sheets and WhatsApp notification. Please also tell me the starting price.

### Answer Key

```
{
  "category": "sales_inquiry",
  "priority": "Medium",
  "sentiment": "Positive",
  "summary": "Customer website form ko Google Sheets aur WhatsApp notification se connect karne ki automation aur starting price pooch raha hai.",
  "reply_goal": "explain_capability_and_ask_requirements",
  "missing_fields": ["website_url", "form_fields", "whatsapp_notification_receiver"],
  "needs_human": false
}
```

## 15.14 Exercise 2 - Reply Draft Likhein

---

### Task

Is angry customer email ka professional reply draft likhein.

I contacted your team three times but no one replied. If I do not get a response today, I will cancel the project.

### Answer Key

Subject: Sorry for the Delay in Response

Hi,

I am sorry for the delay and the inconvenience this has caused. I understand your concern, and I will make sure your request is reviewed today.

Please share the project name or previous email reference so I can check the status and get back to you with a clear update.

Best regards,  
Hamza Ali Khalid

## 15.15 Exercise 3 - Missing Fields Identify Karein

---

### Task

Customer email: Can you create an AI chatbot for my business? Is email mein kaunsi information missing hai?

## Answer Key

- Business type
- Chatbot platform: website, WhatsApp, Instagram, etc.
- Main use case: support, sales, booking, FAQ
- Required integrations
- Timeline
- Budget range

## 15.16 Common Mistakes

---

### Mistake 1

AI ko direct send permission dena. Beginner level par reply draft human review ke baad send hona chahiye.

### Mistake 2

Email ka context ignore karna. Reply email ke original issue ke mutabiq hona chahiye.

### Mistake 3

Prices, policy, refund, ya deadline invent karna. AI ko sirf given business context se answer dena chahiye.

### Mistake 4

Angry customer ko generic reply dena. Complaint email mein apology, next step, aur details request clear honi chahiye.

## 15.17 Chapter Recap

---

### Is chapter mein aap ne seekha

- Email Reply Assistant kya hota hai.
- Email summary, classification, aur draft reply ka workflow.
- Sales, complaint, aur meeting emails ke reply examples.
- Safe email automation rules.
- Mini email assistant project design karna.

## 15.18 Upgrade Challenge

---

### Challenge

Apne Email Reply Assistant mein yeh extra feature add karein:

- Email priority ke mutabiq label assign karein: High, Medium, Low.
- High priority emails ke liye human review required rakhein.
- Sales inquiry ke liye follow-up reminder create karein.
- Complaint email ke liye support ticket draft create karein.

### Suggested Solution

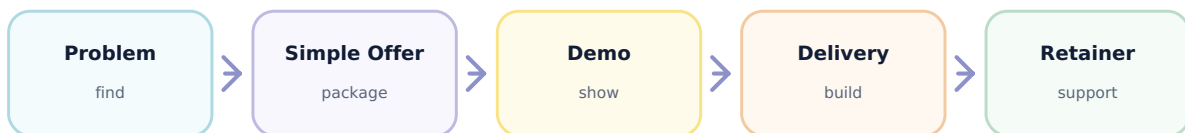
Workflow mein classification ke baad router add karein. Agar category sales\_inquiry ho to follow-up reminder banayein. Agar category complaint ya priority High ho to human\_review\_required true kar dein. Agar missing\_fields exist karte hain to reply draft mein woh details ask karein.



# AI Automation as a Service

Is chapter mein aap seekhein ge ke beginner level par AI automation ko service ki tarah kaise package, price, explain, aur sell karna hai - bina overpromise kiye.

## Service selling ka simple flow



## Chapter ke end tak aap yeh kar sakein ge

- AI automation service ko simple language mein explain karna.
- Beginner-friendly service packages banana.
- Client discovery questions poochna.
- Basic pricing model samajhna.
- Simple proposal aur delivery plan banana.

## 16.1 AI Automation as a Service Kya Hai?

AI Automation as a Service ka matlab hai ke aap kisi business ke repetitive tasks ko AI, prompts, workflows, forms, Google Sheets, email, WhatsApp, ya simple tools ke through automate karne ki service provide karte hain.

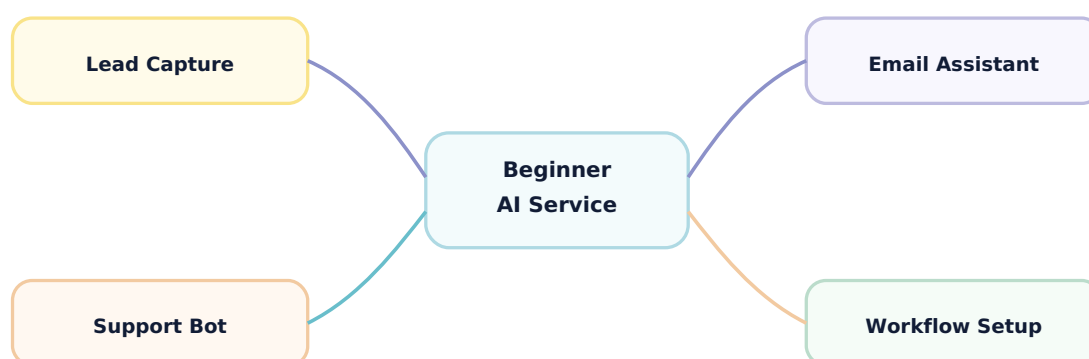
Beginner level par iska goal complex SaaS banana nahi hota. Goal yeh hota hai ke aap client ke kisi simple lekin time-consuming problem ko solve karein. Example: leads ko automatically save karna, customer messages classify karna, email drafts banana, FAQ replies generate karna, ya follow-up reminders create karna.

**Simple rule:** Service tab sell hoti hai jab aap tool nahi, business result explain karte hain. Client ko yeh batayein ke automation se time save hoga, response fast hoga, aur manual mistakes kam hongy.

## 16.2 Beginner Level Par Kya Sell Karna Chahiye?

Beginner ko complex AI agents, full CRM, ya production voice bots sell karne se pehle simple services offer karni chahiye. Aisi services choose karein jo clear hon, jaldi deliver ho sakein, aur client ko quickly value dikha sakein.

### Beginner AI automation service ideas



### Easy services

- Lead capture automation
- Google Sheet lead tracker
- AI email reply drafts
- FAQ support prompt setup
- Customer message classifier

### Avoid at start

- Full enterprise AI platform
- High-risk payment automation
- Legal/medical advice bots
- Unverified WhatsApp Web spam systems
- Complex multi-agent products

## 16.3 Service Ko Tool Ke Naam Se Nahi, Problem Ke Naam Se Sell Karein

Beginner freelancers aksar yeh mistake karte hain ke woh client ko bolte hain: “Main ChatGPT automation bana doon ga” ya “Main n8n workflow bana doon ga.” Client ko tool se zyada apna problem samajh aata hai.

| Weak wording                               | Better wording                                                                                           |
|--------------------------------------------|----------------------------------------------------------------------------------------------------------|
| Main AI workflow bana doon ga.             | Main aapke customer messages ko automatically organize karne ka system bana doon ga.                     |
| Main Google Sheet automation bana doon ga. | Main aapke leads ko automatically sheet mein save karne aur team ko notify karne ka system bana doon ga. |
| Main prompt engineering karta hoon.        | Main aapke business ke liye reusable AI reply templates bana doon ga.                                    |
| Main chatbot bana doon ga.                 | Main aapke FAQs aur customer support ke common questions ka fast response system bana doon ga.           |

## 16.4 Best Niches for Beginner AI Automation

Har business AI automation ke liye ready nahi hota. Beginner ke liye best clients woh hote hain jahan repetitive messages, forms, inquiries, ya follow-ups already exist karte hain.

### Restaurants

Menu questions, order inquiries, location, timing, and delivery queries.

### Clinics

Appointment inquiries, service information, timing, and patient questions.

### E-commerce

Order status, product questions, complaints, returns, and support messages.

### Real estate

Property leads, budget extraction, location preference, and follow-up reminders.

### Education

Course inquiries, admission questions, fee details, and student follow-up.

### Agencies

Lead sorting, email drafts, proposal templates, and client onboarding.

## 16.5 Client Discovery Questions

Client ko solution dene se pehle uska current process samajhna zaroori hai. Discovery questions aapko yeh clear karte hain ke automation ka scope kya hoga.

### Discovery to proposal flow



## Client se yeh questions poochhein

- Aapko daily kitni customer inquiries milti hain?
- Inquiries kahan aati hain: WhatsApp, website, email, Instagram, ya form?
- Sab se repetitive question kaunsa hota hai?
- Leads abhi kahan save hoti hain?
- Team ko notification kahan chahiye: email, WhatsApp, Slack, ya sheet?
- Kaun se cases human ko transfer karne chahiye?
- Aapka current process kitna time leta hai?
- Kya aapko report ya summary bhi chahiye?

## 16.6 Beginner Service Packages

Packages simple aur clear honay chahiye. Har package mein deliverables, timeline, aur limitations mention honi chahiye. Is se client ko samajh aata hai ke woh kis cheez ke paise de raha hai.

### **Starter**

#### **Basic Setup**

- 1 simple workflow
- Lead capture or email draft
- Google Sheet setup
- Basic prompt template
- 1 revision

### **Growth**

#### **Business Workflow**

- 2-3 workflows
- AI classification
- Auto reply draft
- Lead tracker
- Basic documentation

### **Support**

#### **Monthly Care**

- Prompt updates
- Workflow fixes
- Monthly checkup
- Small improvements
- Usage guidance

**Pricing note:** Actual price market, client budget, complexity, and your experience ke mutabiq change hogi. Book ka purpose fixed price dena nahi, pricing thinking samjhana hai.

## 16.7 Pricing Ka Simple Formula

Beginner pricing mein 3 cheezen consider karein: setup time, business value, aur ongoing maintenance. Sirf hours ke hisaab se price na lagayein. Client ke liye jo time save hoga usay bhi value mein count karein.

| Factor         | Question                                       | Impact                             |
|----------------|------------------------------------------------|------------------------------------|
| Complexity     | Kitne tools connect honge?                     | Zyada tools = zyada price          |
| Data           | Fields simple hain ya complex?                 | Complex extraction = zyada testing |
| Risk           | Kya payment/refund/customer data involved hai? | High risk = human review required  |
| Maintenance    | Workflow future mein update hoga?              | Monthly support useful             |
| Business value | Automation se kitna time save hoga?            | High value = better price          |

**My opinion:** Beginner ko pehle small paid projects lene chahiye. 1-2 successful case studies ban jayein to packages aur pricing upgrade karna easier ho jata hai.

## 16.8 Simple Proposal Template

Proposal short, clear, aur outcome-focused honi chahiye. Client ko lambi technical explanation nahi chahiye. Usay yeh chahiye ke kya banega, kaise help karega, kitna time lagega, aur next step kya hai.

**Project:** AI Lead Capture Automation

**Goal:** Website/WhatsApp inquiries ko automatically organize karna, lead details extract karna, aur Google Sheet mein save karna.

**Deliverables:**

- Lead data extraction prompt
- Google Sheet structure
- Auto reply draft
- Priority rules
- Basic testing and documentation

**Timeline:** 3-5 working days after required access and details.

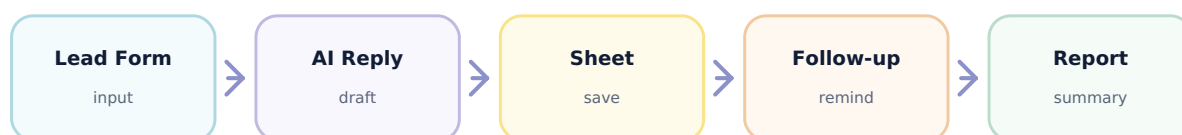
**Client responsibilities:** Business information, sample messages, access to tools, and approval on reply tone.

**Next step:** Share 10 sample customer messages so workflow can be designed accurately.

## 16.9 Delivery Process

Service sell karne ke baad delivery process structured honi chahiye. Agar process clear na ho to client confusion create hoti hai. Beginner ko har project ke liye simple delivery checklist use karni chahiye.

### Beginner delivery process



### Before build

- Client goal confirm karein.
- Sample data collect karein.
- Tools and access confirm karein.
- Required fields define karein.
- Human handoff rules decide karein.

### Before handover

- Workflow test karein.
- Wrong input test karein.
- Missing fields test karein.
- Client ko demo dein.
- Short guide share karein.

## 16.10 Scope Creep Se Kaise Bachna Hai

---

Scope creep ka matlab hai project start hone ke baad client extra cheezen add karta rahe, lekin price aur timeline same expect kare. Beginner freelancers ke liye yeh common problem hai.

### Scope creep examples

- “Bas aik aur platform bhi connect kar dein.”
- “WhatsApp ke sath Instagram bhi add kar dein.”
- “Dashboard bhi bana dein.”
- “Ab isay multi-language bhi kar dein.”

### Professional response

“Yeh feature useful hai. Current scope mein hum pehle agreed workflow complete karte hain. Is extra feature ke liye main separate estimate share kar deta hoon.”

## 16.11 Mini Project - Apni First Service Offer Banayein

---

Ab aap apni first beginner AI automation service offer design karein ge. Is exercise ka goal yeh hai ke aap vague skill ko clear business offer mein convert karein.



## Task

Aik niche choose karein aur uske liye beginner AI automation service offer likhein.

- Niche
- Client problem
- Automation solution
- Deliverables
- Timeline
- Required client information

## Answer Key Example

Niche: Restaurant

Problem: Owner ko WhatsApp par repeated menu aur delivery questions milte hain.

Solution: AI-assisted WhatsApp reply planning + Google Sheet lead/order tracker.

Deliverables:

- FAQ prompt template
- Customer message classification
- Order inquiry data extraction
- Google Sheet structure
- Auto reply drafts

Timeline: 4 working days

Required info:

- Menu
- Delivery areas
- Business timing
- Sample customer messages
- Owner notification preference

## 16.12 Exercise 1 - Weak Offer Ko Improve Karein

---

### Task

Weak offer: “Main AI automation bana doon ga.” Isay business-focused offer mein convert karein.

### Answer Key

“Main aapke customer inquiries ko automatically classify karne, important lead details extract karne, aur Google Sheet mein save karne ka AI-assisted system bana doon ga, taake aapki team fast follow-up kar sake.”

## 16.13 Exercise 2 - Client Questions Likhein

---

### Task

Aik clinic appointment inquiry automation ke liye 6 discovery questions likhein.

### Answer Key

- Patients appointments kahan se request karte hain?
- Clinic services ki list kya hai?
- Appointment ke liye required fields kaun se hain?
- Doctor availability kahan maintain hoti hai?
- Human confirmation required hai ya automatic booking?
- Reminder email/WhatsApp chahiye ya nahi?

## 16.14 Exercise 3 - Package Design Karein

---

### Task

Real estate agency ke liye Starter Package design karein.

### Answer Key

Package Name: Real Estate Lead Tracker Starter

Includes:

- Lead information extraction prompt
- Fields: name, phone, location, property type, budget, timeline
- Lead priority rules
- Google Sheet tracker
- Auto reply draft template
- 1 demo and 1 revision

Not included:

- Full CRM
- Paid ads setup
- Advanced dashboard
- WhatsApp API setup

## 16.15 Common Mistakes

---

### Mistake 1

Client ko too much technical explanation dena. Simple business outcome explain karein.

### Mistake 2

Har project mein advanced AI agents pitch karna. Beginner services simple workflows se start honi chahiye.

### Mistake 3

Scope clear na karna. Deliverables aur limitations written form mein dein.

### Mistake 4

Maintenance ignore karna. Har automation ko future testing aur updates ki zaroorat hoti hai.

## 16.16 Chapter Recap

---

### Is chapter mein aap ne seekha

- AI Automation as a Service ka beginner meaning.
- Simple service ideas jo beginner sell kar sakta hai.
- Problem-focused wording ka importance.
- Client discovery questions aur pricing factors.
- Proposal, delivery, and scope management basics.

## 16.17 Upgrade Challenge

---

### Challenge

Apni first AI automation service ke liye aik one-page offer document banayein. Ismein niche, problem, solution, deliverables, timeline, price range, and next step include karein.

## Suggested Structure

1. Headline: "AI Lead Capture Automation for [Niche]"
2. Problem: current manual process
3. Solution: AI-assisted workflow
4. Deliverables: 4-6 clear items
5. Timeline: realistic delivery time
6. What client needs to provide
7. Next step: sample messages or discovery call

# Complete Beginner Automation System

Is final chapter mein aap Book 1 ke tamam concepts ko aik practical capstone project mein combine karen ge: lead capture, classification, data extraction, Google Sheet-ready output, auto reply, aur human handoff.

## Capstone project ka full flow



## Chapter ke end tak aap yeh bana sakein ge

- Aik complete beginner-level AI automation system ka plan.
- Customer message classifier aur data extractor.
- Google Sheet-ready lead structure.
- Auto reply prompt aur handoff rules.
- Testing checklist, answer key, aur handover document.

## 17.1 Capstone Project Kya Hai?

Capstone project ka matlab hota hai final practical project jahan aap पूरी book mein seekhi hui cheezon ko aik complete system mein apply karte hain. Is book mein hum aik **AI Lead Capture Assistant** banayein ge.

Yeh assistant customer ka message read karega, intent samjhega, important details extract karega, lead quality decide karega, Google Sheet-ready row banaye ga, aur customer ke liye polite reply draft karega.

**Important:** Yeh beginner-level system hai. Iska goal production SaaS banana nahi, balkay practical automation thinking aur workflow design ko strong karna hai.

### System map



## 17.2 Business Scenario

Assume karein aik small business hai jo AC repair, installation, aur maintenance services provide karta hai. Is business ko WhatsApp, website form, aur Facebook page se customer messages aate hain.

Problem yeh hai ke owner har message manually read karta hai, customer details manually note karta hai, aur kai leads miss ho jati hain. Hum aik simple AI-assisted workflow design karein ge jo messages ko organize kare.

### Current problem

- Messages different channels par aate hain.
- Customer details incomplete hoti hain.
- Owner har lead ko manually read karta hai.
- Follow-up delay ho jata hai.
- High-quality leads miss ho sakti hain.

### Automation result

- Message intent detect hota hai.
- Name, phone, service, area, urgency extract hoti hai.
- Lead Google Sheet format mein ready hoti hai.
- Customer ko proper reply draft milta hai.
- Human handoff rules clear hotay hain.

## 17.3 Final System Requirements

Project start karne se pehle requirements clear karna zaroori hai. Requirements se pata chalta hai ke system kya karega aur kya nahi karega.

| Requirement | Description                                                            |
|-------------|------------------------------------------------------------------------|
| Input       | Customer ka raw message                                                |
| AI task     | Intent classify karna, data extract karna, reply draft karna           |
| Output      | Clean JSON and Google Sheet-ready row                                  |
| Storage     | Google Sheet ya Airtable style table                                   |
| Reply       | Roman Urdu polite customer response                                    |
| Handoff     | Angry, urgent, unclear, ya high-value lead ko human ke liye mark karna |



**Scope:** Is project mein hum real WhatsApp API integration nahi kar rahe. Hum workflow, prompt, JSON output, sheet structure, aur testing plan ready karein ge. Integration Book 2 mein deeper level par cover hogi.

## 17.4 Project Build Roadmap

Capstone ko chhote steps mein divide karna isay easy bana deta hai. Har step ka clear output hona chahiye.

### Build roadmap



#### STEP 1

### Business aur use case choose karein

Hum AC service business use kar rahe hain. Aap same structure ko restaurant, clinic, e-commerce, real estate, ya education institute ke liye customize kar sakte hain.

#### STEP 2

### Lead fields define karein

System ko pata hona chahiye ke lead mein kaun kaun si information important hai.

|                         |                                                                                         |
|-------------------------|-----------------------------------------------------------------------------------------|
| <b>customer_name</b>    | Customer ka naam. Missing ho to null.                                                   |
| <b>phone</b>            | Phone number. Agar message channel se already available ho to system use kar sakta hai. |
| <b>service_interest</b> | AC repair, installation, maintenance, gas refill, ya general query.                     |
| <b>location</b>         | Customer ka area/city.                                                                  |
| <b>budget</b>           | Agar customer ne mention kiya ho.                                                       |
| <b>timeline</b>         | Urgent, today, tomorrow, this week, ya flexible.                                        |
| <b>priority</b>         | High, medium, low.                                                                      |
| <b>needs_human</b>      | True/false based on risk or urgency.                                                    |

## 17.5 Google Sheet Structure

Beginner automation mein Google Sheet simple database ki tarah kaam kar sakti hai. Har lead aik row hogi aur har field aik column.

| Column           | Example           | Purpose                     |
|------------------|-------------------|-----------------------------|
| created_at       | 2026-06-30        | Lead time track karna       |
| source           | WhatsApp          | Lead kahan se aayi          |
| customer_name    | Ali               | Follow-up ke liye           |
| phone            | 03001234567       | Contact                     |
| service_interest | AC repair         | Service requirement         |
| location         | Model Town Lahore | Technician/service planning |
| priority         | High              | Fast follow-up              |
| status           | New               | Pipeline tracking           |
| summary          | AC cooling issue  | Quick context               |

**Beginner tip:** Sheet mein columns zyada complicated na banayein. Pehle 8-10 useful columns se start karein. Later client ke feedback ke baad improve karein.

## 17.6 Final Classifier + Extractor Prompt

Ab hum aik prompt banayein ge jo classification aur extraction dono karega. Yeh capstone ka core prompt hai.

You are an AI lead capture assistant for a small business.  
Your job is to read a customer message and return clean JSON.  
Do not invent missing details. Use null where information is missing.

Return this JSON only:

```
{
  "intent": "price_inquiry | service_request | appointment_request | complaint |
general_question | unknown",
  "lead_quality": "high | medium | low",
  "priority": "high | medium | low",
  "customer_name": null,
  "phone": null,
  "email": null,
  "service_interest": null,
  "location": null,
  "budget": null,
  "timeline": null,
  "missing_fields": [],
  "needs_human": false,
  "summary": "short summary",
  "suggested_reply": "polite Roman Urdu reply"
}
```

Rules:

- If user is angry, set needs\_human true.
- If phone/name is missing, add it to missing\_fields.
- Keep suggested\_reply under 3 sentences.
- Reply should be helpful, simple, and professional.

Is prompt ka purpose yeh hai ke AI free-form message ko structured data mein convert kare. Automation platforms jaise Make.com, Zapier, n8n, ya custom backend is JSON ko easily read kar sakte hain.

## 17.7 Example Input and Output

Ab aik real-style customer message test karte hain.

## Customer Message

“Assalam o Alaikum, mera AC cooling nahi kar raha. Main Johar Town Lahore mein hoon. Aaj technician aa sakta hai? Mera number 03001234567 hai.”

## Expected JSON Output

```
{
  "intent": "service_request",
  "lead_quality": "high",
  "priority": "high",
  "customer_name": null,
  "phone": "03001234567",
  "email": null,
  "service_interest": "AC repair / cooling issue",
  "location": "Johar Town Lahore",
  "budget": null,
  "timeline": "today",
  "missing_fields": ["customer_name"],
  "needs_human": false,
  "summary": "Customer needs urgent AC cooling repair in Johar Town Lahore today.",
  "suggested_reply": "Wa Alaikum Assalam, ji hum technician availability check kar sakte hain. Please apna naam share kar dein taake hum aapki request confirm kar saken."
}
```

## 17.8 Lead Priority Rules

Priority rules automation ko business-friendly banate hain. Har lead same importance ki nahi hoti. Kuch leads urgent hoti hain, kuch sirf general inquiry hoti hain.

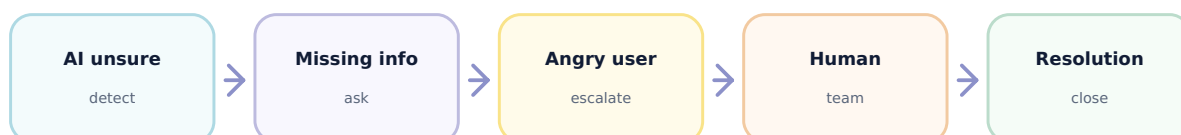
| Priority | Rules                                                                  | Example                                       |
|----------|------------------------------------------------------------------------|-----------------------------------------------|
| High     | Urgent timeline, phone provided, clear service need, location provided | “Aaj technician bhej dein, number yeh hai...” |
| Medium   | Service interest clear, lekin contact ya location missing              | “AC repair ka rate kya hai?”                  |
| Low      | General question, unclear need, no contact information                 | “Details?”                                    |

**Rule:** Priority AI ko guess karne ke liye nahi, business action guide karne ke liye hoti hai.

## 17.9 Human Handoff Rules

Har automation mein human handoff zaroor hona chahiye. AI har case handle nahi kar sakti. Jab conversation risky, angry, unclear, ya business-critical ho to human ko involve karna better hai.

### Human handoff flow



### Human ko transfer karein jab

- Customer angry ho.
- Payment/refund issue ho.
- Medical/legal/financial advice involved ho.
- AI ko answer confident na ho.
- Lead high-value ho.

### AI handle kar sakti hai jab

- Simple price inquiry ho.
- Basic service information poochi gayi ho.
- Required fields collect karne hon.
- FAQ ka answer available ho.
- Auto reply draft generate karna ho.

## 17.10 Auto Reply Prompt

---

Structured JSON ke baad customer ke liye reply draft generate karna useful hota hai. Reply simple, polite, aur business tone mein hona chahiye.

You are a polite customer support assistant.  
Use the extracted lead data and write a short Roman Urdu reply.

Rules:

- Reply under 3 sentences.
- If important information is missing, ask only for missing fields.
- Do not promise service confirmation unless human/team has confirmed it.
- Keep tone helpful and professional.
- If needs\_human is true, say that team member will review and contact them.

### Example Reply

Ji, aapki AC repair request note kar li gayi hai. Please apna naam share kar dein taake hum technician availability check kar saken. Hamari team aap se shortly contact karegi.

## 17.11 Testing Checklist

---

Automation ko client ko dene se pehle test karna zaroori hai. Testing ka goal yeh check karna hai ke prompt different types ke messages par stable output deta hai ya nahi.

### Normal tests

- Clear service request
- Price inquiry
- Appointment request
- General question
- Complete lead

### Edge cases

- Missing phone
- Missing location
- Angry complaint
- Mixed language message
- Very short message: "details?"

| Test message                      | Expected result                                        |
|-----------------------------------|--------------------------------------------------------|
| AC gas refill ka rate?            | intent price_inquiry, missing phone/name/location      |
| AC kharab hai, urgent hai         | service_request, priority high, ask for location/phone |
| Payment kar di lekin koi nahi aya | complaint, needs_human true                            |
| details?                          | unknown/general_question, ask what service they need   |

## 17.12 Mini Project - Complete Lead Capture Assistant

Ab aap full capstone project khud design karein. Pehle apna answer likhein, phir answer key se compare karein.

### Task

Aik service business choose karein aur uske liye AI Lead Capture Assistant ka plan banayein.

- Business type
- Input channel
- Required fields
- Intent categories
- Priority rules
- Google Sheet columns
- Auto reply rules
- Human handoff conditions

## Answer Key Example

Business type: AC repair service  
Input channel: WhatsApp / Website form  
Required fields: name, phone, service, location, timeline  
Intent categories: price\_inquiry, service\_request, appointment\_request, complaint, general\_question  
Priority rules:  
- High: urgent + phone + location  
- Medium: service clear but missing contact/location  
- Low: vague/general inquiry  
Google Sheet columns:  
created\_at, source, name, phone, service, location, timeline, priority, status, summary  
Auto reply rules:  
- Ask only for missing fields  
- Do not confirm technician until human approval  
- Keep reply short and polite  
Human handoff:  
- Angry customer, refund/payment issue, urgent high-value request, unclear repeated messages

## 17.13 Exercise 1 - Classify and Extract

### Task

Message ko JSON mein convert karein:

“Mujhe kal DHA Lahore mein AC service chahiye. Price bhi bata dein. Mera naam Usman hai.”



## Answer Key

```
{
  "intent": "service_request",
  "lead_quality": "medium",
  "priority": "medium",
  "customer_name": "Usman",
  "phone": null,
  "email": null,
  "service_interest": "AC service",
  "location": "DHA Lahore",
  "budget": null,
  "timeline": "tomorrow",
  "missing_fields": ["phone"],
  "needs_human": false,
  "summary": "Usman needs AC service tomorrow in DHA Lahore and asks for price.",
  "suggested_reply": "Ji Usman, AC service ke liye hum details share kar sakte hain. Please apna phone number share kar dein taake team aap se confirm kar sake."
}
```

## 17.14 Exercise 2 - Google Sheet Row Banayein

### Task

Upar wali lead ke liye Google Sheet row design karein.

## Answer Key

| Column           | Value                                                                |
|------------------|----------------------------------------------------------------------|
| source           | WhatsApp                                                             |
| customer_name    | Usman                                                                |
| phone            | Missing                                                              |
| service_interest | AC service                                                           |
| location         | DHA Lahore                                                           |
| timeline         | Tomorrow                                                             |
| priority         | Medium                                                               |
| status           | Need phone number                                                    |
| summary          | Customer wants AC service in DHA Lahore tomorrow and asks for price. |

## 17.15 Exercise 3 - Handoff Decision

### Task

Message: "Main ne payment kar di thi lekin technician nahi aya. Mujhe abhi call karein warna complaint karun ga." Is case mein AI kya kare?

## Answer Key

- Intent: complaint
- Priority: high
- Sentiment: angry
- needs\_human: true
- Action: customer ko calm reply de aur human team ko immediately notify kare

**Suggested reply:** Sorry for the inconvenience. Aapka issue urgent mark kar diya gaya hai. Hamari team aap se shortly contact karegi taake payment aur technician visit ka status check kiya ja sake.

## 17.16 Final Handover Document

---

Client ya apne project record ke liye handover document banana professional habit hai. Is se future changes easy ho jati hain.

### Handover mein include karein

- Automation ka goal
- Input channels
- Google Sheet columns
- Prompt templates
- Priority rules
- Human handoff rules
- Testing examples
- Known limitations
- Future upgrade ideas

**Known limitations example:** AI missing details ask kar sakti hai, lekin technician availability confirm nahi karegi jab tak team confirm na kare.

## 17.17 Final Project Rubric

Apne capstone project ko evaluate karne ke liye yeh simple rubric use karein.

| Area          | Good project mein kya hona chahiye                       |
|---------------|----------------------------------------------------------|
| Clarity       | Business problem and automation goal clearly defined.    |
| Fields        | Required fields realistic and useful.                    |
| Prompt        | Prompt clear, structured, and JSON output stable.        |
| Reply         | Auto reply short, polite, and does not overpromise.      |
| Handoff       | Risky cases human ko transfer hotay hain.                |
| Testing       | Normal and edge cases dono test kiye gaye.               |
| Documentation | Client or future user ke liye simple handover available. |

## 17.18 Book 1 Final Recap

Book 1 ka goal yeh tha ke aap AI Automation ko beginner level par practical nazariye se samjhein. Aap ne concepts ke sath prompts, workflows, classification, extraction, JSON, email, support, WhatsApp planning, service selling, aur capstone project dekha.

## Aap ne ab tak kya seekha

- AI Automation ka basic concept.
- Business workflow ko samajhne ka mindset.
- Beginner tools ka overview.
- Prompt engineering basics.
- Customer message classification.
- Data extraction and JSON output.
- Lead capture, email, support, and WhatsApp planning.
- Beginner AI automation services sell karne ka method.
- Final capstone system design karna.

## 17.19 Next Step

Book 1 ke baad aap ka next step yeh hona chahiye ke aik simple project real data ke sath test karein. Aap apne friend ke business, apne small project, ya demo business ke liye AI Lead Capture Assistant bana sakte hain.

### Practice path

1. 10 customer messages collect karein.
2. Classifier prompt test karein.
3. JSON output improve karein.
4. Google Sheet columns ready karein.
5. Auto replies test karein.
6. Mini demo record karein.

### Book 2 mein next level

- Real webhooks
- Make.com practical scenarios
- n8n workflows
- APIs and HTTP requests
- CRM integrations
- Real WhatsApp bot architecture

## 17.20 Final Upgrade Challenge

---

### Challenge

Apne capstone project ka 1-page portfolio case study banayein. Ismein problem, solution, workflow diagram, tools, sample output, and business benefit mention karein.

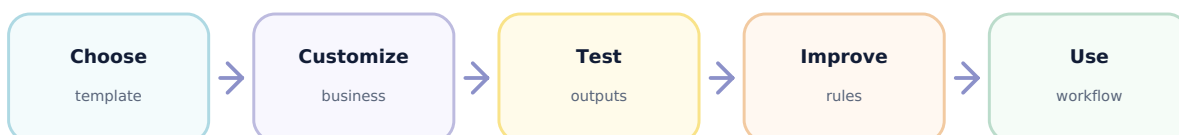
### Suggested Case Study Structure

1. **Problem** Business manual leads handle kar raha tha.
2. **Solution** AI message classifier + data extractor + Sheet-ready output.
3. **Workflow** Message -> AI -> JSON -> Sheet -> Reply.
4. **Result** Faster response, organized leads, fewer missed inquiries.
5. **Next upgrade** Webhook and WhatsApp API integration.

# Prompt Templates

Is bonus section mein aapko ready-to-use AI automation prompt templates milenge. In templates ko copy karke apne business, client, ya practice projects ke mutabiq customize kiya ja sakta hai.

## Template use karne ka simple flow



## Is bonus material mein kya hai?

- Customer support, lead qualification, data extraction, email, complaint, FAQ, WhatsApp, follow-up, content, workflow planning, aur prompt improvement templates.
- Har template ke saath purpose, use case, aur usage note.
- Beginner-friendly placeholders jinko aap real business data se replace kar sakte hain.

# Prompt Templates Ko Kaise Use Karna Hai?

---

Prompt template aik reusable instruction hoti hai. Aap isay baar baar different businesses aur workflows ke liye use kar sakte hain. Lekin template ko blindly copy-paste nahi karna chahiye. Har business ka context, rules, policies, aur tone different hoti hai.

## Kya karna hai

- Placeholder values replace karein.
- Business rules clearly add karein.
- Output format define karein.
- 3-5 examples par test karein.
- Final prompt ko version number dein.

## Kya avoid karna hai

- Prompt ko bina test kiye live use karna.
- AI ko policy guess karne dena.
- Long unclear instructions likhna.
- JSON output ke rules skip karna.
- Human handoff rule na rakhna.

**Important:** Templates learning aur starting point ke liye hain. Real client project mein hamesha business policy, pricing, delivery, refund, data privacy, aur human approval rules verify karein.

## Prompt Template Index

---

### 01 Customer Support Reply Prompt

Support bot, WhatsApp replies, website chat, email support

### 02 Lead Qualification Prompt

Lead capture, sales assistant, Google Sheets CRM



### **03 Data Extraction Prompt**

Forms, CRM, sheets, WhatsApp lead automation

### **04 Email Summary Prompt**

Gmail assistant, support inbox, sales inbox

### **05 Email Reply Draft Prompt**

Sales replies, complaint replies, support replies

### **06 Complaint Summary Prompt**

Support ticketing, Jira/Zendesk/Freshdesk style workflow

### **07 FAQ Answer Prompt**

Website chatbot, WhatsApp bot, support bot

### **08 WhatsApp Bot Router Prompt**

WhatsApp order bot, service bot, lead bot

### **09 Follow-up Message Prompt**

Sales follow-up, WhatsApp follow-up, email follow-up

### **10 Content Idea Prompt**

TikTok/Reels scripts, social posts, content calendar

### **11 Workflow Planner Prompt**

Client discovery, automation planning, Make/n8n/Zapier planning

### **12 Prompt Improvement Prompt**

Prompt engineering practice, client prompt cleanup

### Template 01

## Customer Support Reply Prompt

### Purpose

Customer ke common support message ka polite reply generate karne ke liye.

### Use case

Support bot, WhatsApp replies, website chat, email support

### PROMPT TEMPLATE

You are a polite customer support assistant for {{business\_name}}.

Business context:  
{{business\_context}}

Customer message:  
{{customer\_message}}

Task:  
Reply in Roman Urdu. Keep the reply short, clear, and helpful.

Rules:

- Do not invent information.
- If order number, phone, or location is missing, ask only for the missing detail.
- If the customer is angry, apologize politely and suggest human support.
- Keep the reply under 4 sentences.

Output only the reply.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context} jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

## Template 02

### Lead Qualification Prompt

#### Purpose

Customer inquiry ko lead quality, service interest, aur next action mein convert karne ke liye.

#### Use case

Lead capture, sales assistant, Google Sheets CRM

#### PROMPT TEMPLATE

You are an AI lead qualification assistant.

Customer message:  
{{customer\_message}}

Classify the lead and return JSON only:

```
{
  "lead_quality": "high | medium | low",
  "intent": "price_inquiry | service_request | appointment_request | general_question | complaint | unknown",
  "service_interest": null,
  "budget": null,
  "timeline": null,
  "location": null,
  "missing_fields": [],
  "next_action": "",
  "summary": ""
}
```

Rules:

- High quality lead means clear need + urgency or contact details.
- Do not guess missing details.
- Use null for missing values.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context} jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

### Template 03

## Data Extraction Prompt

### Purpose

Customer message se name, phone, email, service, location, budget, aur timeline extract karne ke liye.

### Use case

Forms, CRM, sheets, WhatsApp lead automation

### PROMPT TEMPLATE

You are a data extraction assistant.

Extract information from this message:  
{{customer\_message}}

Return JSON only:

```
{
  "customer_name": null,
  "phone": null,
  "email": null,
  "service": null,
  "location": null,
  "budget": null,
  "timeline": null,
  "important_notes": null,
  "missing_fields": []
}
```

Rules:

- Do not add details that are not present.
- If a field is missing, use null.
- Add required missing fields to missing\_fields.
- Keep important\_notes short.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context} jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

## Template 04

### Email Summary Prompt

#### Purpose

Long email ko short summary, category, priority, aur required action mein convert karne ke liye.

#### Use case

Gmail assistant, support inbox, sales inbox

#### PROMPT TEMPLATE

You are an email assistant.

Email subject:  
{{email\_subject}}

Email body:  
{{email\_body}}

Return JSON only:

```
{
  "summary": "",
  "category": "sales | support | complaint | partnership | billing | general | spam",
  "priority": "high | medium | low",
  "sender_request": "",
  "required_action": "",
  "needs_human": true
}
```

Rules:

- Summary should be maximum 2 lines.
- Mark needs human true for complaints, billing, legal, or angry tone.
- Do not write the reply yet.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context}  
jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

## Template 05

### Email Reply Draft Prompt

#### Purpose

Email ka professional draft reply generate karne ke liye.

#### Use case

Sales replies, complaint replies, support replies

#### PROMPT TEMPLATE

You are a professional email reply assistant.

Context:  
{{context}}

Original email:  
{{email\_body}}

Task:  
Write a professional reply in {{language}}.

Rules:

- Be polite, clear, and helpful.
- Keep the reply concise.
- Do not promise anything that is not confirmed.
- If information is missing, ask for it clearly.
- End with a natural closing.

Output only the email reply.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context} jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

## Template 06

### Complaint Summary Prompt

#### Purpose

Customer complaint ko category, priority, summary, aur handoff decision mein convert karne ke liye.

#### Use case

Support ticketing, Jira/Zendesk/Freshdesk style workflow

#### PROMPT TEMPLATE

You are a complaint classification assistant.

Customer complaint:  
{{complaint\_message}}

Return JSON only:

```
{
  "category": "payment_issue | delivery_issue | product_issue | service_issue | refund_request | other",
  "priority": "high | medium | low",
  "sentiment": "angry | frustrated | neutral | polite",
  "summary": "",
  "required_information": [],
  "needs_human": true,
  "suggested_customer_reply": ""
}
```

Rules:

- Payment, refund, angry tone, or repeated issue should be high priority.
- suggested\_customer\_reply should be in Roman Urdu.
- Keep summary short and action-focused.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context} jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

## Template 07

### FAQ Answer Prompt

#### Purpose

Approved FAQ knowledge base se answer generate karne ke liye.

#### Use case

Website chatbot, WhatsApp bot, support bot

#### PROMPT TEMPLATE

You are an FAQ assistant for {{business\_name}}.

Approved FAQ knowledge base:  
{{faq\_knowledge\_base}}

Customer question:  
{{customer\_question}}

Task:  
Answer only using the approved FAQ knowledge base.

Rules:

- If answer is available, reply in Roman Urdu.
- If answer is not available, say that you do not have confirmed information and suggest human support.
- Do not invent policy, price, delivery time, refund rule, or discount.
- Keep reply under 4 sentences.

Output only the customer reply.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context} jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.



## Template 08

# WhatsApp Bot Router Prompt

### Purpose

WhatsApp message ka intent detect karke next action decide karne ke liye.

### Use case

WhatsApp order bot, service bot, lead bot

## PROMPT TEMPLATE

You are a WhatsApp automation router.

Customer message:  
{{customer\_message}}

Return JSON only:

```
{
  "intent": "menu_request | price_inquiry | place_order | service_request | order_status |
complaint | human_support | unknown",
  "confidence": "high | medium | low",
  "next_action": "send_faq | ask_missing_info | create_lead | create_order | create_ticket |
handoff_to_human",
  "missing_fields": [],
  "short_reply": ""
}
```

Rules:

- short\_reply must be Roman Urdu.
- If confidence is low, ask a clarifying question.
- If user asks for human, set next\_action to handoff\_to\_human.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context}  
jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

## Template 09

### Follow-up Message Prompt

#### Purpose

Lead ya customer ko polite follow-up message bhejne ke liye.

#### Use case

Sales follow-up, WhatsApp follow-up, email follow-up

#### PROMPT TEMPLATE

```
You are a sales follow-up assistant.  
  
Lead context:  
{{lead_context}}  
  
Last interaction:  
{{last_interaction}}  
  
Task:  
Write a short follow-up message in Roman Urdu.  
  
Rules:  
- Do not sound pushy.  
- Mention the customer's interest naturally.  
- Ask one clear next-step question.  
- Keep it under 3 sentences.  
  
Output only the follow-up message.
```

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context} jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

## Template 10

### Content Idea Prompt

#### Purpose

Business ke liye simple social media content ideas generate karne ke liye.

#### Use case

TikTok/Reels scripts, social posts, content calendar

#### PROMPT TEMPLATE

You are a content idea assistant for {{business\_type}}.

Audience:  
{{target\_audience}}

Goal:  
{{content\_goal}}

Generate 10 content ideas.

For each idea return:

- Hook
- Main point
- CTA
- Best format: reel | carousel | text post | story

Rules:

- Ideas should be practical and easy to produce.
- Use Roman Urdu.
- Focus on benefits, not technical jargon.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context}  
jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

## Template 11

# Workflow Planner Prompt

## Purpose

Business process ko automation workflow mein convert karne ke liye.

## Use case

Client discovery, automation planning, Make/n8n/Zapier planning

## PROMPT TEMPLATE

You are an AI automation workflow planner.

Business problem:  
{{business\_problem}}

Current manual process:  
{{current\_process}}

Available tools:  
{{available\_tools}}

Create an automation plan with:

1. Trigger
2. Required input data
3. AI task
4. Decision rules
5. Actions
6. Storage
7. Human handoff
8. Error handling
9. Testing checklist

Rules:

- Keep the plan beginner-friendly.
- Do not overcomplicate the workflow.
- Mention assumptions clearly.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context}  
jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

## Template 12

# Prompt Improvement Prompt

## Purpose

Weak prompt ko strong automation prompt mein improve karne ke liye.

## Use case

Prompt engineering practice, client prompt cleanup

## PROMPT TEMPLATE

You are a prompt improvement assistant.

Weak prompt:  
{{weak\_prompt}}

Goal:  
{{goal}}

Improve the prompt by adding:

- Role
- Context
- Task
- Output format
- Rules
- Examples if needed

Return:  
1. Improved prompt  
2. Why this version is better  
3. Possible edge cases

Rules:  
- Keep the improved prompt practical.  
- Use simple language.  
- Do not make the prompt unnecessarily long.

**Use karne ka tareeqa:** {business\_name}, {customer\_message}, {context}  
jaise placeholders ko apne real data se replace karein. Pehle 3-5 test messages par output check karein, phir automation mein use karein.

# Bonus Exercise - Apni Prompt Library Banayein

## Task

Apne kisi aik target business ke liye 5 prompt templates customize karein.  
Example: restaurant, clinic, online store, property dealer, AC repair service, salon, academy, ya software agency.

- Customer support prompt
- Lead qualification prompt
- Data extraction prompt
- Follow-up message prompt
- Workflow planner prompt

## Answer Key Example - AC Repair Service

|                              |                                                                          |
|------------------------------|--------------------------------------------------------------------------|
| <b>Business</b>              | AC repair, installation, gas refill, and maintenance service             |
| <b>Customer support tone</b> | Roman Urdu, polite, short, helpful                                       |
| <b>Required lead fields</b>  | Name, phone, service, area, preferred time                               |
| <b>Handoff cases</b>         | Angry customer, payment issue, urgent same-day visit, repeated complaint |
| <b>Follow-up style</b>       | Non-pushy message asking one clear next-step question                    |

# Prompt Testing Checklist

---

## Before using any prompt in automation

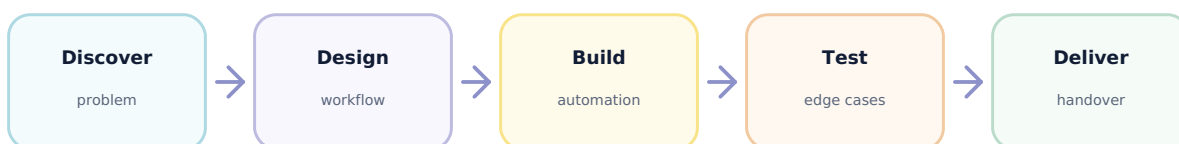
- Output format stable hai?
- AI missing information guess to nahi kar rahi?
- JSON valid aa raha hai?
- Reply Roman Urdu mein aa raha hai?
- Human handoff rules work kar rahe hain?
- Angry customer case safe handle ho raha hai?
- Business policies invent to nahi ho rahi?
- Long messages aur short messages dono test hue hain?

**Final tip:** Achi automation ka secret sirf acha prompt nahi hota. Acha prompt + clear workflow + clean data + testing + human handoff mil kar reliable automation banate hain.

# Workflow Checklists

Is bonus section ka maqsad yeh hai ke aap har AI automation project ko random tareeqe se nahi, balkay checklist-based professional process ke sath plan, build, test, aur deliver karein.

## Professional workflow delivery flow



## Is bonus material mein kya hai?

- Discovery, readiness, prompt design, JSON, lead capture, email, support bot, WhatsApp, testing, delivery, maintenance, aur proposal checklists.
- Har checklist ke sath clear purpose, avoid rules, aur expected output.
- Beginner-friendly process jo client projects mein use kiya ja sakta hai.



# Workflow Checklist Kya Hoti Hai?

---

Workflow checklist aik step-by-step quality control list hoti hai. Is ka kaam yeh hota hai ke project start karne se pehle aap important cheezen miss na karein. Beginner freelancers ke liye checklist bohot important hai, kyun ke AI automation mein choti si missing detail bhi output, client experience, aur delivery ko weak bana sakti hai.

## Checklist ka faida

- Project scope clear hota hai.
- Client se right questions pooche jate hain.
- Prompt aur workflow zyada reliable bante hain.
- Testing structured hoti hai.
- Delivery professional lagti hai.

## Best use method

- Har project se pehle Discovery Checklist fill karein.
- Build se pehle Automation Readiness verify karein.
- Delivery se pehle Testing Checklist complete karein.
- Client handover ke waqt Delivery Checklist use karein.

**Important:** AI automation ka goal sirf workflow banana nahi hota. Goal reliable business result dena hota hai. Checklist aapko isi result tak disciplined tareeqe se le jati hai.

## Checklist Index

---

### 01. Client Discovery Checklist

Client se pehle call ya meeting mein business process samajhne ke liye.

### 02. Automation Readiness Checklist

Check karne ke liye ke project automation ke liye ready hai ya nahi.

### 03. Prompt Design Checklist

AI prompt ko automation ke liye reliable aur testable banane ke liye.

### 04. JSON Output Checklist

AI se clean structured output lene ke liye jo automation tools samajh saken.

### 05. Lead Capture Workflow Checklist

Website, WhatsApp, form, ya email se incoming lead ko capture aur organize karne ke liye.

### 06. Email Automation Checklist

Email summary, classification, aur reply draft automation safely design karne ke liye.

### 07. Customer Support Bot Checklist

FAQ-based support assistant ko safe aur helpful banane ke liye.

### 08. WhatsApp Automation Planning Checklist

WhatsApp bot ya WhatsApp lead/order automation ka flow plan karne ke liye.

### 09. Testing Checklist

Automation ko client ya real users ke samne chalane se pehle test karne ke liye.

### 10. Delivery and Handover Checklist

Project complete hone ke baad client ko clean delivery dene ke liye.

### 11. Maintenance Checklist

Automation live hone ke baad quality maintain karne ke liye.

### 12. Client Proposal Checklist

Beginner automation service ko professional proposal mein convert karne ke liye.

## Checklist 01

# Client Discovery Checklist

**Purpose:** Client se pehle call ya meeting mein business process samajhne ke liye.

### Check karein

- ☐ Business kis industry mein hai?
- ☐ Daily kitne customer messages, emails, ya leads aate hain?
- ☐ Current process manual hai ya kisi tool mein chal raha hai?
- ☐ Customer data abhi kahan save hota hai?
- ☐ Sab se repetitive task kaunsa hai?
- ☐ Delay ya mistake sab se zyada kahan hoti hai?
- ☐ Client ka desired outcome kya hai: time save, sales improve, response speed, ya support quality?
- ☐ Human team kab involve hoti hai?
- ☐ Client ke paas required tools/API access hai?
- ☐ Automation success ka simple metric kya hoga?

### Avoid karein

- ☐ Sirf tool ke naam par project start na karein.
- ☐ Client ka real workflow samjhe baghair proposal na dein.
- ☐ Har problem ko AI se solve karne ki koshish na karein.

### Expected output:

A clear one-page project brief: problem, current process, automation goal, tools, required fields, and success metric.

## Automation Readiness Checklist

**Purpose:** Check karne ke liye ke project automation ke liye ready hai ya nahi.

### Check karein

- ☐ Trigger clearly defined hai?
- ☐ Input data predictable hai?
- ☐ Required fields list available hai?
- ☐ Business rules documented hain?
- ☐ Customer reply tone clear hai?
- ☐ AI ko kis data tak access milega?
- ☐ Storage system decided hai: Google Sheet, Airtable, CRM, database?
- ☐ Human handoff cases defined hain?
- ☐ Error/fallback message ready hai?
- ☐ Client testing ke liye sample messages de sakta hai?

### Avoid karein

- ☐ Aisi automation na banayein jahan rules unclear hon.
- ☐ Sensitive data ko bina approval store na karein.
- ☐ Automation ko 100 percent perfect promise na karein.

### Expected output:

Go / No-Go decision with missing requirements list.

### Checklist 03

## Prompt Design Checklist

**Purpose:** AI prompt ko automation ke liye reliable aur testable banane ke liye.

### Check karein

- ☐ Role clearly define hai?
- ☐ Business context add hai?
- ☐ Task specific hai?
- ☐ Output format clear hai?
- ☐ Rules and limitations add hain?
- ☐ Missing data handling defined hai?
- ☐ Do not invent information rule add hai?
- ☐ Tone and language defined hai?
- ☐ Examples add karne ki zaroorat hai?
- ☐ Prompt ka version number saved hai?

### Avoid karein

- ☐ Vague prompt: customer ko reply do.
- ☐ AI ko pricing, policy, discount guess karne dena.
- ☐ Output format undefined chorna.

### Expected output:

A reusable prompt template with placeholders and rules.

## JSON Output Checklist

**Purpose:** AI se clean structured output lene ke liye jo automation tools samajh saken.

### Check karein

- ☐ JSON schema pehle se defined hai?
- ☐ All keys fixed hain?
- ☐ Missing values ke liye null use ho raha hai?
- ☐ Arrays required jagah par use ho rahi hain?
- ☐ Boolean fields true/false format mein hain?
- ☐ Priority/intent values limited options se aa rahi hain?
- ☐ AI ko JSON only instruction diya gaya hai?
- ☐ Extra explanation output mein nahi aa rahi?
- ☐ Sample outputs test kiye gaye hain?
- ☐ Broken JSON ka fallback plan hai?

### Avoid karein

- ☐ AI se free-form text aur JSON mix output lena.
- ☐ Field names har run mein change hone dena.
- ☐ Required fields ka missing logic skip karna.

### Expected output:

Stable JSON output that can be used by Google Sheets, Make.com, n8n, Zapier, or backend API.

## Checklist 05

# Lead Capture Workflow Checklist

**Purpose:** Website, WhatsApp, form, ya email se incoming lead ko capture aur organize karne ke liye.

### Check karein

- ☐ Lead source defined hai?
- ☐ Customer name capture ho raha hai?
- ☐ Phone/email capture ho raha hai?
- ☐ Service interest extract ho raha hai?
- ☐ Location/budget/timeline fields available hain?
- ☐ Lead priority rule set hai?
- ☐ Google Sheet/CRM columns ready hain?
- ☐ Auto reply message ready hai?
- ☐ Duplicate lead handling ka plan hai?
- ☐ Sales team notification required hai?

### Avoid karein

- ☐ Har inquiry ko same priority dena.
- ☐ Incomplete lead ko lost lead samajhna.
- ☐ Follow-up field na rakhna.

### Expected output:

Lead row with status, priority, missing fields, and next action.

## Email Automation Checklist

**Purpose:** Email summary, classification, aur reply draft automation safely design karne ke liye.

### Check karein

- ☐ Email category list defined hai?
- ☐ Priority rules defined hain?
- ☐ Reply auto-send hoga ya draft only?
- ☐ Sensitive emails human review mein jayengi?
- ☐ Complaint/billing/legal cases handoff honge?
- ☐ Email tone approved hai?
- ☐ Signature and closing defined hai?
- ☐ Attachments handle karne ka plan hai?
- ☐ Spam/irrelevant emails ignore rule hai?
- ☐ Final reply client approval ke baad send hogi?

### Avoid karein

- ☐ AI-generated email bina review auto-send karna.
- ☐ Legal, billing, refund, ya angry customer emails automate kar dena.
- ☐ Unconfirmed information promise karna.

### Expected output:

Email summary JSON + safe reply draft.



## Customer Support Bot Checklist

**Purpose:** FAQ-based support assistant ko safe aur helpful banane ke liye.

### Check karein

- ☐ Approved FAQ knowledge base ready hai?
- ☐ Bot ko sirf approved info use karne ka rule diya gaya hai?
- ☐ Unknown question ka fallback reply ready hai?
- ☐ Complaint category detection hai?
- ☐ Human support request detect hoti hai?
- ☐ Angry tone detect hota hai?
- ☐ Order/payment/refund cases handoff hote hain?
- ☐ Bot reply short aur polite hai?
- ☐ Conversation log save ho raha hai?
- ☐ Testing mein real customer messages use hue hain?

### Avoid karein

- ☐ Bot ko policy invent karne dena.
- ☐ Customer ko circular replies dena.
- ☐ Human support option hide karna.

### Expected output:

Support reply + category + handoff decision.

## WhatsApp Automation Planning Checklist

**Purpose:** WhatsApp bot ya WhatsApp lead/order automation ka flow plan karne ke liye.

### Check karein

- ☐ WhatsApp Business App, Cloud API, ya approved provider decide hai?
- ☐ User intents list ready hai?
- ☐ Opening message defined hai?
- ☐ Required fields step-by-step collect honge?
- ☐ Session/memory duration plan hai?
- ☐ Human handoff keyword/rule defined hai?
- ☐ Opt-in and business policy ka khayal hai?
- ☐ Owner/team notification channel defined hai?
- ☐ Bot reply short rakha gaya hai?
- ☐ Test numbers par workflow verify hua hai?

### Avoid karein

- ☐ Unofficial WhatsApp Web automation ko production promise karna.
- ☐ Long paragraphs WhatsApp par bhejna.
- ☐ Customer se ek saath bohot zyada fields mangna.

### Expected output:

Intent map + message flow + handoff rules.

## Testing Checklist

**Purpose:** Automation ko client ya real users ke samne chalane se pehle test karne ke liye.

### Check karein

- ☐ Happy path test hua?
- ☐ Missing field case test hua?
- ☐ Wrong input case test hua?
- ☐ Angry customer case test hua?
- ☐ Human handoff test hua?
- ☐ API/tool failure case test hua?
- ☐ Duplicate message case test hua?
- ☐ Slow response/fallback test hua?
- ☐ JSON output 10+ examples par stable hai?
- ☐ Client ne final flow approve kiya?

### Avoid karein

- ☐ Sirf aik example par test karna.
- ☐ Edge cases ignore karna.
- ☐ Client ko bina demo ke final delivery dena.

### Expected output:

Test report with pass/fail notes and fixes.

## Checklist 10

# Delivery and Handover Checklist

**Purpose:** Project complete hone ke baad client ko clean delivery dene ke liye.

### Check karein

- ☐ Final workflow diagram share kiya?
- ☐ Tools/accounts list documented hai?
- ☐ Prompts and versions documented hain?
- ☐ Google Sheet/CRM columns explained hain?
- ☐ How to test guide diya?
- ☐ Human handoff process explained hai?
- ☐ Known limitations clearly mention ki hain?
- ☐ Maintenance plan discuss hua?
- ☐ Client training/demo complete hai?
- ☐ Backup/export file share hui?

### Avoid karein

- ☐ Client ko undocumented system dena.
- ☐ Limitations hide karna.
- ☐ Maintenance scope unclear chorna.

### Expected output:

Clean handover package with PDF/Doc, workflow diagram, prompts, and testing notes.

## Checklist 11

# Maintenance Checklist

**Purpose:** Automation live hone ke baad quality maintain karne ke liye.

### Check karein

- ☐ Weekly error log review hota hai?
- ☐ Failed messages check hote hain?
- ☐ Prompt output quality review hoti hai?
- ☐ Business policy changes update hoti hain?
- ☐ FAQ/knowledge base updated hai?
- ☐ Tool/API limits monitor hote hain?
- ☐ Cost/usage tracking hoti hai?
- ☐ Customer feedback collect hota hai?
- ☐ Monthly improvement list banti hai?
- ☐ Backup and access review hota hai?

### Avoid karein

- ☐ Live automation ko set and forget samajhna.
- ☐ Client policy changes ko prompt mein update na karna.
- ☐ Usage cost ignore karna.

### Expected output:

Monthly optimization report with fixes and improvement suggestions.

## Checklist 12

### Client Proposal Checklist

**Purpose:** Beginner automation service ko professional proposal mein convert karne ke liye.

#### Check karein

- ☐ Client problem clear sentence mein likha hai?
- ☐ Proposed automation flow simple hai?
- ☐ Included features list defined hai?
- ☐ Not included items clear hain?
- ☐ Timeline realistic hai?
- ☐ Client responsibilities mentioned hain?
- ☐ Tools/subscription cost separate hai?
- ☐ Setup fee and maintenance fee clear hai?
- ☐ Testing and revision policy defined hai?
- ☐ Payment terms clear hain?

#### Avoid karein

- ☐ Unlimited revisions offer karna.
- ☐ Tool subscription cost apne price mein silently include karna.
- ☐ Timeline bohot aggressive rakhna.

#### Expected output:

One-page professional proposal ready to send.

## One-Page Project Proposal Template

Is template ko client discovery ke baad fill karein. Is se aapka proposal simple, clear, aur professional ban jata hai.

Client Name: \_\_\_\_\_  
 Business Type: \_\_\_\_\_  
 Main Problem: \_\_\_\_\_  
 Current Manual Process: \_\_\_\_\_  
 Automation Goal: \_\_\_\_\_  
 Tools Required: \_\_\_\_\_  
 Required Fields: \_\_\_\_\_  
 Human Handoff Cases: \_\_\_\_\_  
 Timeline: \_\_\_\_\_  
 Setup Fee: \_\_\_\_\_  
 Monthly Maintenance: \_\_\_\_\_  
 Client Approval: \_\_\_\_\_

## Testing Matrix

Har automation ko sirf normal case par test na karein. Neechay wali testing matrix se aap edge cases bhi cover kar sakte hain.

| Test Type           | Example                             | Expected Result                             |
|---------------------|-------------------------------------|---------------------------------------------|
| <b>Happy path</b>   | Customer gives all required details | Lead/order/ticket created successfully      |
| <b>Missing info</b> | Customer gives service but no phone | Bot asks only for missing phone             |
| <b>Wrong input</b>  | Customer sends unrelated message    | Bot asks clarification or routes to general |
| <b>Complaint</b>    | Customer is angry about payment     | High priority + human handoff               |
| <b>Tool failure</b> | Sheet/API not responding            | Fallback reply + internal alert             |

# Final Workflow Quality Score

---

## Apne project ko score dein

- Discovery complete: 10 points
- Required fields clear: 10 points
- Prompt tested: 10 points
- JSON output stable: 10 points
- Human handoff rule added: 10 points
- Error/fallback ready: 10 points
- Client demo complete: 10 points
- Documentation ready: 10 points
- Maintenance plan discussed: 10 points
- Client approval received: 10 points

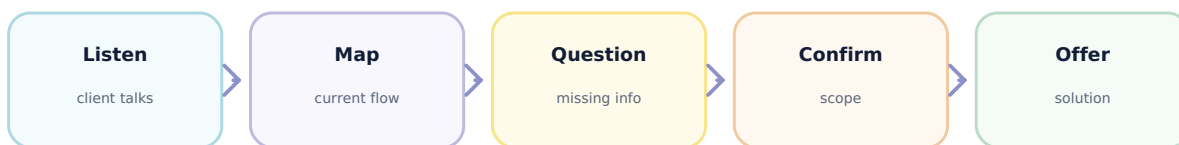
**Score guide:** 80-100 = ready for delivery. 60-79 = improve before launch. Below 60 = project requirements are not clear enough yet.



# Client Discovery Questions

Is bonus section mein woh practical questions diye gaye hain jo aap client se AI automation project start karne se pehle pooch sakte hain. In questions ka goal client ki real problem, workflow, required data, tools, budget, aur success metric samajhna hai.

## Discovery call ka simple flow



## Is bonus material ka result

- Aap client se professional tareeqe se questions pooch sakenge.
- Aap scope, tools, required fields, and handoff rules clearly define kar sakenge.
- Aap proposal dene se pehle unclear requirements identify kar sakenge.

# Client Discovery Kya Hoti Hai?

---

Client discovery ka matlab hai project start karne se pehle client ke business, current workflow, pain points, data, tools, aur goals ko samajhna. Beginner freelancers aksar direct solution batana start kar dete hain, lekin professional approach yeh hai ke pehle problem ko clearly samjha jaye.

**Achhi AI automation hamesha achhi discovery se start hoti hai.**

## Discovery ka faida

- Project scope clear hota hai.
- Wrong solution build hone ka risk kam hota hai.
- Client ko professional confidence milta hai.
- Pricing justify karna easy hota hai.

## Discovery mein avoid karein

- Direct tool suggest na karein.
- Client ke process ko assume na karein.
- Budget poochne se pehle value samjhein.
- Har cheez ko AI se automate karne ka promise na karein.

# Question Categories

---

## 01. Business Overview Questions

Client ka business, industry, aur overall context samajhne ke liye.

## 02. Current Workflow Questions

Manual process ko step-by-step map karne ke liye.

## 03. Repetitive Task Questions

Automation ke liye best tasks identify karne ke liye.

#### **04. Customer Message Questions**

AI classifier aur chatbot flow design karne ke liye real customer messages collect karna.

#### **05. Required Data Questions**

Lead capture, order taking, appointment, ya ticket creation ke required fields define karna.

#### **06. Tools and Access Questions**

Automation build karne ke liye required tools, accounts, aur access identify karna.

#### **07. Response and Tone Questions**

AI replies ko brand aur customer expectation ke mutabiq banana.

#### **08. Human Handoff Questions**

Decide karna ke bot kab ruk kar human ko involve kare.

#### **09. Success Metrics Questions**

Project ke result ko measure karne ke liye.

#### **10. Budget, Timeline, and Scope Questions**

Project ko realistic scope, timeline, aur price ke sath close karna.

### Question Set 01

## 1. Business Overview Questions

**Purpose:** Client ka business, industry, aur overall context samajhne ke liye.

- 1 Aap ka business kis industry mein kaam karta hai?
- 2 Aap ka main product ya service kya hai?
- 3 Aap ke typical customers kaun hain?
- 4 Aap daily ya weekly kitne customers/leads handle karte hain?
- 5 Aap ka business zyada sales-focused hai ya support-focused?
- 6 Aap ki team mein customer messages kaun handle karta hai?
- 7 Aap ke liye sab se important business outcome kya hai: zyada leads, fast response, less manual work, ya better support?
- 8 Aap currently kis process se customers ko manage karte hain?
- 9 Aap ke business mein sab se zyada time-consuming task kaunsa hai?
- 10 Aap kis result ko successful automation samjhein ge?

### **Expected output:**

Business context, target customer, current workload, and success goal clear ho jana chahiye.

### Question Set 02

## 2. Current Workflow Questions

**Purpose:** Manual process ko step-by-step map karne ke liye.

- 1 Customer ya lead sab se pehle aap se kahan contact karta hai?
- 2 First message receive hone ke baad aap ka next step kya hota hai?
- 3 Aap customer se kaunsi information collect karte hain?
- 4 Aap ka data abhi kahan save hota hai: notebook, WhatsApp, Google Sheet, CRM, ya database?
- 5 Aap customer ko reply kaise dete hain?
- 6 Aap follow-up kaise karte hain?
- 7 Agar customer incomplete details de to aap kya karte hain?
- 8 Agar complaint aaye to process kya hota hai?
- 9 Agar human agent required ho to handoff kaise hota hai?
- 10 Is current process mein sab se zyada delay kahan hota hai?

### **Expected output:**

Current manual workflow ka simple diagram ban sake: Trigger -> Steps -> Data -> Response -> Follow-up.

### Question Set 03

## 3. Repetitive Task Questions

**Purpose:** Automation ke liye best tasks identify karne ke liye.

- 1 Kaunsa kaam aap roz repeat karte hain?
- 2 Kaunsa kaam boring hai lekin zaroori hai?
- 3 Kaunsa task staff ka zyada time leta hai?
- 4 Kaunsa task mistakes create karta hai?
- 5 Kaunsa task simple rules follow karta hai?
- 6 Kaunsa reply aap baar baar customers ko bhejte hain?
- 7 Kaunsi information aap baar baar customer se mangte hain?
- 8 Kaunsa kaam AI draft kar sakta hai lekin human final review kare?
- 9 Kaunsa task fully automate nahi hona chahiye?
- 10 Agar aik task automate ho jaye to aap ke business ko sab se zyada faida kis mein hoga?

### **Expected output:**

Automation candidates ki list: easy, medium, and advanced tasks.

#### Question Set 04

## 4. Customer Message Questions

**Purpose:** AI classifier aur chatbot flow design karne ke liye real customer messages collect karna.

- 1 Customers sab se zyada kaunsi 5 queries poochte hain?
- 2 Aap ke paas recent customer messages ke examples hain?
- 3 Customer usually Roman Urdu, Urdu, English, ya mixed language use karte hain?
- 4 Customer messages short hote hain ya detailed?
- 5 Customers price zyada poochte hain ya availability?
- 6 Complaint messages kis type ke hote hain?
- 7 Kaunsi messages urgent hoti hain?
- 8 Kaunsi messages human support ko transfer honi chahiye?
- 9 Aap ka preferred reply tone kya hai: formal, friendly, short, sales-focused, ya professional?
- 10 Kya kuch words ya promises avoid karne hain?

### **Expected output:**

Intent categories, tone rules, sample messages, and human handoff cases clear ho jana chahiye.

### Question Set 05

## 5. Required Data Questions

**Purpose:** Lead capture, order taking, appointment, ya ticket creation ke required fields define karna.

1 Aap customer se minimum kaunsi information lena chahte hain?

2 Name required hai ya optional?

3 Phone number required hai?

4 Email required hai?

5 Location/area required hai?

6 Service/product interest required hai?

7 Budget ya quantity required hai?

8 Preferred date/time required hai?

9 Agar required field missing ho to bot kya pooche?

10 Kaunsi information sensitive hai jo bot ko store nahi karni chahiye?

### Expected output:

Required fields, optional fields, and missing field questions ki final list.



### Question Set 06

## 6. Tools and Access Questions

**Purpose:** Automation build karne ke liye required tools, accounts, aur access identify karna.

- 1 Aap currently kaun se tools use karte hain?
- 2 Kya aap Google Sheets ya Airtable use kar sakte hain?
- 3 Kya Gmail/Workspace account available hai?
- 4 Kya WhatsApp Business App ya Cloud API available hai?
- 5 Kya website form ya landing page already hai?
- 6 Kya CRM use ho raha hai?
- 7 Kya koi existing database ya backend API hai?
- 8 Kya Make.com, Zapier, ya n8n ka account available hai?
- 9 Kya API keys ya admin access mil sakta hai?
- 10 Tool subscriptions ka payment client karega ya project cost mein include hoga?

### **Expected output:**

Tool stack, access requirements, and third-party subscription cost clear ho jana chahiye.

### Question Set 07

## 7. Response and Tone Questions

**Purpose:** AI replies ko brand aur customer expectation ke mutabiq banana.

- 1 Aap ka brand tone friendly hai ya formal?
- 2 Replies short honi chahiye ya detailed?
- 3 Roman Urdu, English, Urdu, ya mixed language mein replies chahiye?
- 4 Greeting ka preferred style kya hai?
- 5 Kya bot apna introduction de?
- 6 Kya bot customer ka naam use kare?
- 7 Kya discounts ya prices mention karne ki permission hai?
- 8 Kya bot appointment/order confirm kar sakta hai ya sirf request receive kare?
- 9 Kya bot apology use kare complaints mein?
- 10 Kaunsi lines ya claims avoid karne hain?

### **Expected output:**

Approved response style guide and reply rules.

## 8. Human Handoff Questions

**Purpose:** Decide karna ke bot kab ruk kar human ko involve kare.

- 1 Kaunsi situations human agent ko transfer honi chahiye?
- 2 Complaint high priority kab hoti hai?
- 3 Refund, payment, legal, ya sensitive cases ka process kya hai?
- 4 Customer agar kahe “human se baat karni hai” to bot kya kare?
- 5 Handoff ke waqt team ko kaunsi details milni chahiye?
- 6 Team notification WhatsApp, email, Slack, ya CRM mein chahiye?
- 7 Human agent response time expectation kya hai?
- 8 Kya bot customer ko ticket/reference number de?
- 9 Agar human unavailable ho to fallback message kya hoga?
- 10 Kya handoff conversation history ke sath hona chahiye?

### **Expected output:**

Clear handoff triggers, team notification format, and fallback message.

## 9. Success Metrics Questions

**Purpose:** Project ke result ko measure karne ke liye.

- 1 Aap kis metric ko improve karna chahte hain?
- 2 Current average response time kya hai?
- 3 Kitni leads daily/weekly aati hain?
- 4 Kitni leads miss ho jati hain?
- 5 Current conversion rate ka estimate hai?
- 6 Automation ke baad aap ka target kya hai?
- 7 Aap ko weekly ya monthly report chahiye?
- 8 Kaun se data points report mein chahiye?
- 9 Kya customer satisfaction track karni hai?
- 10 First month ke end par success kaise judge karenge?

### **Expected output:**

Measurable success criteria: response time, lead capture rate, missed leads, follow-ups, or tickets resolved.

### Question Set 10

## 10. Budget, Timeline, and Scope Questions

**Purpose:** Project ko realistic scope, timeline, aur price ke sath close karna.

- 1 Aap is automation ko kab tak launch karna chahte hain?
- 2 Initial version mein minimum features kaun se chahiye?
- 3 Future version mein kaun se features add ho sakte hain?
- 4 Aap one-time setup chahte hain ya monthly maintenance bhi?
- 5 Testing ke liye kaun available hoga?
- 6 Content/FAQ/data client provide karega?
- 7 Revisions kitni required hongi?
- 8 Aap ka approximate budget range kya hai?
- 9 Tool/API monthly cost ke liye separate budget hai?
- 10 Final approval ka decision maker kaun hai?

### Expected output:

Project scope, timeline, pricing structure, and decision maker clear ho jana chahiye.

## Client Answers Ko Kaise Interpret Karein

Client ke answers sirf information nahi dete; woh aapko automation opportunity bhi batate hain. Neechay kuch common answers aur unka meaning diya gaya hai.

| Client Answer                                  | Meaning                                        | Next Step                                    |
|------------------------------------------------|------------------------------------------------|----------------------------------------------|
| “Mujhe bas WhatsApp bot chahiye”               | Client outcome nahi, tool mention kar raha hai | Problem aur current workflow poochein        |
| “Hum daily bohot messages miss kar dete hain”  | Lead capture and response speed problem        | Lead capture automation propose karein       |
| “Staff same questions ka jawab deta rehta hai” | FAQ/support automation opportunity             | FAQ bot + human handoff propose karein       |
| “Payment/refund issues sensitive hain”         | Full automation risky ho sakti hai             | Draft + human review workflow propose karein |
| “Data abhi WhatsApp mein scattered hai”        | Storage and CRM problem                        | Google Sheet/CRM structure add karein        |

## One-Page Discovery Form

Client call ke dauran ya baad mein yeh form fill karein. Is se aap project brief easily bana sakte hain.

**Client Name:** \_\_\_\_\_

**Business Type:** \_\_\_\_\_

**Main Problem:** \_\_\_\_\_

**Current Workflow:** \_\_\_\_\_

**Automation Goal:** \_\_\_\_\_

**Required Data Fields:** \_\_\_\_\_

**Tools Required:** \_\_\_\_\_

**Human Handoff Cases:** \_\_\_\_\_

**Success Metric:** \_\_\_\_\_

**Budget / Timeline:** \_\_\_\_\_

# Discovery Call Script

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Ye short script aap first client call mein use kar sakte hain.

Assalam-o-Alaikum, main aap ka current customer process samajhna chahta hoon taa ke automation sirf tool-based na ho, balkay aap ke real business problem ko solve kare.

1. Customers aap se sab se zyada kis channel par contact karte hain?
2. First message ke baad aap normally kya karte hain?
3. Aap customer se kaunsi information lazmi collect karte hain?
4. Sab se zyada repetitive ya time-consuming task kaunsa hai?
5. Kaunsi situations human team ko transfer honi chahiye?
6. Agar yeh automation successful ho, to aap kis result ko improvement samjhein ge?

In answers ke baad main aap ke liye simple workflow, required fields, tools, aur estimated scope prepare kar doon ga.

## Bonus Exercise

---

### Exercise: Restaurant Client Discovery

Assume karein aik restaurant owner WhatsApp order automation chahte hain. Neechay diye gaye tasks complete karein:

- 1 Owner se poochne ke liye 10 discovery questions likhein.
- 2 Required fields define karein: customer name, phone, order items, address, payment method, etc.
- 3 Human handoff cases define karein.
- 4 Success metric decide karein.

#### Sample Answer:

Questions mein daily orders, current WhatsApp process, menu format, delivery areas, order confirmation method, payment method, cancellation rules, owner notification, peak hours, and human handoff cases include hone chahiye. Success metric: missed orders reduce, response time improve, and orders Google Sheet mein automatically save hon.



# Final Discovery Checklist

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## Discovery complete tab samjhein jab:

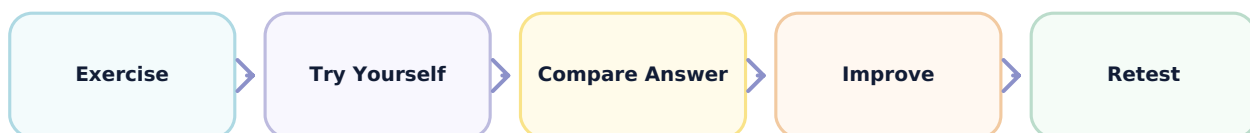
- Business problem clear ho.
- Current workflow step-by-step mapped ho.
- Required fields final hon.
- Tools and access clear hon.
- Human handoff rules clear hon.
- Success metric measurable ho.
- Budget and timeline discuss ho chuke hon.
- Client ne scope approve kar diya ho.

# Exercise Answer Keys

Book 1 ke exercises ke practical answers, sample solutions, aur checking guidelines.

## Is bonus ka maqsad

Yeh section reader ko apne answers compare karne, prompts improve karne, aur beginner-level AI automation projects ko practical tareeqe se evaluate karne mein help karta hai.



## HOW TO USE

# Answer Keys Ko Kaise Use Karein?

Answer key ko direct copy-paste solution na samjhein. Pehle exercise khud solve karein, phir answer key ke saath compare karein. Agar aap ka answer slightly different hai lekin logic, output format, aur business purpose clear hai, to woh bhi valid ho sakta hai.

### 1. Pehle khud try karein

Exercise ka answer bina answer key dekhe likhein.

### 2. Structure compare karein

Check karein ke intent, fields, output, aur next action clear hain.

### 3. Improve karein

Apne answer ko clean, short, and automation-friendly banayein.

## Quick Checking Rule

Har answer mein 4 cheezen honi chahiye: **business context**, **clear task**, **structured output**, aur **next action**.

## Chapter 1

# AI Automation Kya Hai?

Is chapter ka answer key reader ko concept clear karne aur real examples identify karne mein help karta hai.

- 1 AI Automation ka simple meaning:** AI ko tools, workflows, data, aur business processes ke saath connect karke repetitive kaam automatically karwana.
- 2 Traditional automation example:** form submit ho to fixed thank-you email send ho jaye.
- 3 AI automation example:** customer message read ho, intent detect ho, data extract ho, aur relevant reply generate ho.
- 4 Best beginner use cases:** lead capture, email reply draft, FAQ bot, complaint summary, customer message classification.
- 5 Important rule:** AI se sirf jawab nahi lena; AI ko workflow ke decision-making part ke taur par use karna hai.

### Sample Solution / Checking Guideline:

Agar reader ne restaurant, e-commerce, clinic, property dealer, ya small service business ka example diya hai aur us mein input -> AI decision -> action -> output clear hai, to answer correct hai.

## AI Automation Mindset

Reader ko tool-first soch ke bajaye problem-first soch develop karni hai.

- 1 **Correct mindset:** pehle business problem samjho, phir tool choose karo.
- 2 **Good automation candidate:** repetitive, time-consuming, rule-based, low-risk, and easy to test.
- 3 **Bad automation candidate:** sensitive decisions, legal/medical judgment, final payment approval, ya high-risk customer promise.
- 4 **Discovery method:** client se current workflow, tools, customer messages, required fields, and success goal poochna.
- 5 **Output:** automation plan mein trigger, input data, AI task, action, fallback, and human handoff clear hona chahiye.

### Sample Solution / Checking Guideline:

Best answer woh hai jo tool ka naam directly start nahi karta, balkay pehle manual workflow ko map karta hai.

## Beginner Tools Overview

Tools ko categories mein samajhna: AI, storage, communication, workflow, and access.

- 1 **ChatGPT/OpenAI:** prompt, classification, extraction, reply generation ke liye.
- 2 **Google Sheets/Airtable:** beginner-friendly storage ke liye.
- 3 **Gmail:** email summary, draft reply, and follow-up workflows ke liye.
- 4 **Make.com/Zapier:** no-code workflow automation ke liye.
- 5 **n8n:** low-code and self-hosted automation ke liye.
- 6 **WhatsApp Business/API:** customer conversation channel ke liye.
- 7 **Webhook/API:** systems ko connect karne ke liye.

### Sample Solution / Checking Guideline:

Ek beginner stack ka valid answer: Google Form -> Google Sheet -> AI classification -> email/WhatsApp draft -> manual review.

## Prompt Engineering Basics

Prompt ko professional structure mein likhna seekhna.

- 1 **Good prompt structure:** Role + Context + Task + Rules + Output Format + Example.
- 2 **Bad prompt:** "Reply to customer." Yeh vague hai.
- 3 **Good prompt:** "You are a polite support assistant. Reply in Roman Urdu. Ask for order number if order status is missing. Keep response under 3 lines."
- 4 **Automation prompt ka rule:** output predictable hona chahiye, preferably JSON ya clearly structured text.
- 5 **Testing:** prompt ko 5-10 sample messages par test karein.

### Sample Solution / Checking Guideline:

Agar answer mein role, task, tone, limitation, and output format included hain, to prompt acceptable hai.

## Chapter 5

# Customer Message Classification

Customer message ko intent, priority, sentiment, aur next action mein convert karna.

- 1 **“Price kya hai?”** intent: price\_inquiry, priority: medium, next\_action: ask\_product\_or\_service.
- 2 **“Mera order abhi tak nahi aya.”** intent: order\_status/delivery\_complaint, priority: medium, next\_action: ask\_order\_id.
- 3 **“Payment deduct ho gayi order confirm nahi hua.”** intent: complaint, category: payment\_issue, priority: high, human\_needed: true.
- 4 **“Human agent se baat karni hai.”** intent: human\_support, priority: medium/high, human\_needed: true.
- 5 **“Kal appointment mil sakti hai?”** intent: appointment\_request, next\_action: collect\_name\_phone\_date\_time.

### Sample Solution / Checking Guideline:

```
{
  "intent": "payment_complaint",
  "category": "payment_issue",
  "priority": "high",
  "sentiment": "negative",
  "human_needed": true,
  "next_action": "collect_order_id_and_create_ticket"
}
```



## Data Extraction with AI

Customer message se useful fields extract karna.

- 1 **Lead fields:** name, phone, service, city/area, budget, urgency, message, missing\_fields.
- 2 **Restaurant order fields:** items, quantity, delivery\_address, customer\_name, phone, payment\_method, missing\_fields.
- 3 **Appointment fields:** name, phone, service\_type, preferred\_date, preferred\_time, notes.
- 4 **Missing info rule:** guess nahi karna; missing\_fields array mein add karna.
- 5 **Sheet-ready output:** clean keys use karo, values simple rakho, and one row per lead/order.

### Sample Solution / Checking Guideline:

```
{
  "customer_name": null,
  "phone": "03001234567",
  "service": "AC repair",
  "area": "Model Town Lahore",
  "urgency": "high",
  "missing_fields": ["customer_name"]
}
```

## Structured Output aur JSON

AI output ko automation-friendly JSON mein lena.

- 1 **JSON object:** key-value pairs ka structured format.
- 2 **String:** text value, example: "Ali".
- 3 **Number:** numeric value, example: 5000.
- 4 **Boolean:** true/false value, example: true.
- 5 **Array:** multiple values ki list, example: ["name", "phone"].
- 6 **Broken JSON fix:** extra explanation remove karein, double quotes use karein, trailing comma avoid karein.

### Sample Solution / Checking Guideline:

```
{
  "intent": "lead_inquiry",
  "lead_quality": "high",
  "customer": {
    "name": "Ali",
    "phone": "03001234567"
  },
  "missing_fields": []
}
```

## Lead Capture Automation

Lead ko collect, classify, store, and reply karna.

- 1 **Trigger:** website form, WhatsApp message, Facebook lead, email, ya manual entry.
- 2 **AI task:** lead details extract karna, priority assign karna, reply draft karna.
- 3 **Storage:** Google Sheet, Airtable, CRM, ya database.
- 4 **Priority high:** urgent need, budget shared, phone shared, clear service requirement.
- 5 **Auto reply:** polite, short, next step clear, no false promise.

### Sample Solution / Checking Guideline:

Example flow: Customer message -> AI extracts name/phone/service -> lead score -> Google Sheet row -> customer reply draft -> owner notification.

## AI Email Assistant

Emails ko summarize, classify, and safe reply draft mein convert karna.

- 1 **Email summary:** 2-3 lines mein main issue/result.
- 2 **Email category:** sales\_inquiry, support\_issue, complaint, meeting\_request, spam/other.
- 3 **Draft reply:** professional tone, short paragraphs, clear next action.
- 4 **Safe rule:** AI final email send na kare unless human approves.
- 5 **Complaint email:** acknowledge, apologize if needed, ask for required details, escalate if sensitive.

### Sample Solution / Checking Guideline:

Correct answer mein email ka intent, urgency, required response, and draft reply included hona chahiye.

## Basic Customer Support Assistant

FAQ-based support assistant ka simple plan banana.

- 1 **Support categories:** pricing, delivery, refund, complaint, technical\_issue, human\_support.
- 2 **Knowledge source:** FAQs, policies, services, pricing rules, working hours.
- 3 **Unknown answer:** bot should not guess; contact detail collect kare ya human handoff kare.
- 4 **Human handoff:** payment, refund, angry customer, legal/sensitive issue, repeated failed answers.
- 5 **Good support reply:** helpful, specific, short, and next step clear.

### Sample Solution / Checking Guideline:

Correct support bot design mein FAQ answer, missing info question, and escalation rule zaroor honi chahiye.

## Basic WhatsApp Automation Planning

WhatsApp bot ka beginner planning structure.

- 1 **WhatsApp Business App:** manual small business use ke liye.
- 2 **WhatsApp Cloud API:** proper scalable automation ke liye.
- 3 **WhatsApp Web automation:** unofficial/risky approach; production mein avoid karna better.
- 4 **Restaurant bot flow:** menu -> order items -> address -> phone -> confirmation -> owner notification.
- 5 **Session/memory:** bot ko conversation context maintain karna chahiye so repeated questions avoid hon.
- 6 **Handoff:** complaint, refund, payment issue, or human request.

### Sample Solution / Checking Guideline:

Valid WhatsApp plan mein intents, required fields, reply tone, data storage, and handoff rules clear hone chahiye.

## AI Prompt Library

Reusable prompts ka organized collection banana.

- 1 **Prompt library categories:** support, sales, lead capture, extraction, email, complaint, FAQ, WhatsApp router, follow-up, content, workflow planner.
- 2 **Each prompt should include:** purpose, input, rules, output format, and example.
- 3 **Versioning:** prompt v1, v2, v3 maintain karein.
- 4 **Testing:** har prompt ko real sample input se test karein.
- 5 **Improvement:** vague prompt ko structured prompt mein convert karein.

### Sample Solution / Checking Guideline:

Best answer woh hai jahan prompt templates reusable hain aur each prompt ka expected output clear hai.

## Chapter 13

# Lead Capture Assistant

Complete beginner lead assistant project ka answer key.

- 1 **Input:** customer message.
- 2 **AI output:** extracted lead fields + priority + missing\_fields + reply draft.
- 3 **Storage:** Google Sheet columns: date, name, phone, service, area, budget, priority, status, notes.
- 4 **Reply:** missing fields ask kare, clear next step de.
- 5 **Owner alert:** high priority lead ho to notify immediately.

### Sample Solution / Checking Guideline:

```
{
  "lead_status": "qualified",
  "priority": "high",
  "customer_name": "Ali",
  "phone": "03001234567",
  "service": "website development",
  "budget": "50000 PKR",
  "missing_fields": [],
  "reply": "Ji Ali, details share karne ka shukriya. Hamari team aap se website development ke next steps ke liye contact karegi."
}
```



## Mini Customer Support Bot

FAQ bot project ke expected answer keys.

- 1 **FAQ match:** answer directly from approved FAQ.
- 2 **Partial info:** ask one clear follow-up question.
- 3 **Unknown question:** say info available nahi, human support offer kare.
- 4 **Complaint:** summarize issue, collect required fields, escalate.
- 5 **Output:** intent, answer\_source, reply, human\_needed, missing\_fields.

### Sample Solution / Checking Guideline:

```
{
  "intent": "refund_question",
  "answer_source": "policy_faq",
  "reply": "Refund policy check karne ke liye please apna order number share kar dein.",
  "human_needed": false,
  "missing_fields": ["order_number"]
}
```

## Email Reply Assistant

Email assistant project ke solutions.

- 1 **Step 1:** email summary create karo.
- 2 **Step 2:** category and priority assign karo.
- 3 **Step 3:** required information identify karo.
- 4 **Step 4:** reply draft banao.
- 5 **Step 5:** human approval ke baad send karo.

### Sample Solution / Checking Guideline:

Correct reply polite, specific, and action-oriented hoti hai. It should not promise refunds, discounts, delivery dates, or approvals unless policy/data confirms it.

## AI Automation as a Service

Beginner service selling ke answer keys.

- 1 **Starter service:** lead capture automation, email assistant, FAQ bot, prompt library, Google Sheet automation.
- 2 **Best niches:** restaurants, clinics, e-commerce stores, real estate, salons, training institutes, agencies.
- 3 **Proposal must include:** problem, solution, deliverables, timeline, price, tools, maintenance, limitations.
- 4 **Scope control:** included work aur not included work clearly write karein.
- 5 **Pricing:** setup fee + monthly maintenance/hosting/support.

### Sample Solution / Checking Guideline:

Good beginner package: Google Sheet lead capture + AI classification + reply drafts + owner notification + 1 week support.

## Final Capstone Project

Book 1 ke complete beginner automation system ka final answer key.

- 1 System goal:** customer message ko lead/support/complaint mein classify karna, data extract karna, reply generate karna, and record save karna.
- 2 Core modules:** input channel, AI classifier, extractor, Google Sheet, auto reply draft, human handoff.
- 3 Testing:** normal lead, missing data, complaint, irrelevant message, human request, angry customer, and duplicate lead.
- 4 Success metric:** response time reduce, leads organized, fewer missed messages, better follow-up.
- 5 Final rule:** beginner automation ka purpose business process improve karna hai, not replace every human decision.

### Sample Solution / Checking Guideline:

```
Customer Message
-> AI Classifier
-> AI Extractor
-> Missing Field Check
-> Google Sheet / CRM
-> Reply Draft
-> Human Handoff if needed
-> Follow-up Status
```

# Exercise Answer Quality Checklist

Har chapter ke answers ko final karte waqt is checklist se verify karein.

- ✓ Answer ka business use case clear hai.
- ✓ Prompt ya workflow mein input clearly defined hai.
- ✓ Output format predictable hai: JSON, table, bullets, ya clear reply.
- ✓ Missing information ke liye guessing nahi ki gayi.
- ✓ Human handoff rules included hain jahan zaroori hai.
- ✓ Reply friendly, short, and safe hai.
- ✓ Automation ka next action clear hai.
- ✓ Exercise ka answer real client scenario mein use ho sakta hai.

## Final Note

Book 1 ka goal yeh nahi ke reader har advanced system build kare. Goal yeh hai ke reader simple AI automations ko confidently plan, prompt, test, aur explain kar sake.