



Eleven replies, seven meetings

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Fictional document — demonstration example

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Fictional document, produced for demonstration. **The CRM is updated on all eleven: status, note, next action and date.** Nothing for the salespeople to re-enter.

What came in and what was done

Nature	Count	Agent's action	State
Interested — slot accepted	4	Booked in the calendar, invitation with history	Confirmed
Interested — other dates requested	3	Three new slots offered	Awaiting reply
Questions before going further	2	Answered from your documents	Meeting booked on one
Refusals	2	Sequence stopped, reason recorded	One to revisit in January

What the salesperson receives in their calendar

Field	Content
Subject	Discovery meeting — 20 min
Attachment	Dated fact, exchange history, question asked by the prospect
Note	What triggered the reply — useful for opening the conversation

CRM fields updated automatically

Field	Value carried	Source
Status	Meeting booked / To follow up / Refusal	Nature of the reply
Next action and date	Always filled in	Sequence rule
Reason for refusal	Free text taken from the reply	The prospect's words, not an interpretation
Address origin	Page and date consulted	Targeted list

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.