

Virtual Assistant Guide — from WhatsApp to your calendar

This guide is for anyone who has just hired **Ava**, the virtual assistant that answers your business WhatsApp. It goes from start to finish: connecting WhatsApp, teaching Ava about your business, **setting up your team's schedule** and following the day-to-day. You don't need any tech skills — every step names the exact button.

The screenshots are real, taken in the panel of a sample company (*Casa Modelo Reformas & Materiais*). The sample company is Brazilian, so the texts it wrote itself (the greeting, the keywords) show up in Portuguese; in your account you'll see your own.

Never been in the panel? Read the [Getting started](#) chapter first: it shows how to sign in, how the screen is organized and how to find modules in the menu.

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1. What Ava does for you

Ava answers **everyone who writes** to your business WhatsApp — day, night and weekends. She:

- **answers questions** with what you taught her (services, prices, the area you cover);
- **understands audio, photos and documents** the customer sends — and replies to the content;
- **asks the right questions** before handing the contact to you (the ones you choose);

- **books the visit** with whoever on your team can go — she picks the person by area and by that day's schedule, confirms to the customer and alerts the person on WhatsApp (part 6 of this guide);
- **sends the PIX** payment code with the agreed amount, if you want (Brazil only — she never says the payment arrived; you check it);
- **calls you** when the customer asks for a person or uses a word you chose.

What she does **not** do: make up prices you didn't teach her, promise what isn't in your knowledge base, or pretend to be human. When she doesn't know, she says so honestly.

You stay in control. Everything Ava says shows up in your own WhatsApp on your phone, like any other chat. If you reply from there, she notices and **waits up to 5 minutes** before speaking again — you two never talk over each other.

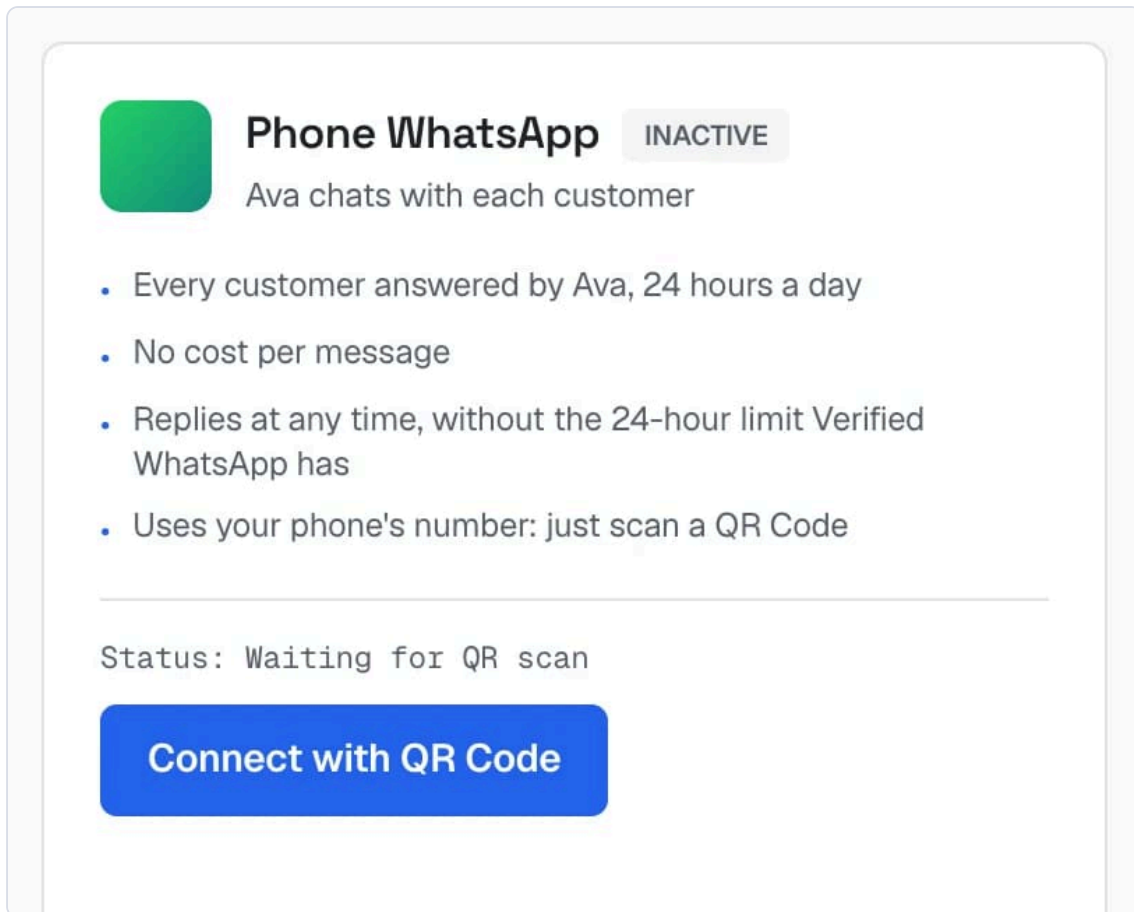
2. Before you start

Have these four things ready and you'll set everything up in one go. A Google account is **optional** (part 6).

What	Why
Your own panel login	You set everything up with it — and, if you use Google Calendar, it's the signed-in person's account that gets connected.
A phone with your business WhatsApp	It's the number Ava will answer. Use your support number, never your personal one .
Who does the visits (name and, if you like, each person's phone)	It's the team Ava spreads the visits across. Don't know the names yet? Start with "Technician 1", "Technician 2".
Your price list and list of services	It's what Ava uses to answer. It can be a PDF, a spreadsheet saved as PDF or plain text.

3. Step 1 — Connect your WhatsApp

Where: menu → **All connections** → **WhatsApp Business** card → **Phone WhatsApp — Ava support**.



1. Click **Connect with QR Code**. A small square (the QR Code) appears on the screen.
2. **Now pick up the business phone**. Open WhatsApp and go to **Settings** → **Linked devices** → **Link a device**.
3. Point the phone's camera at the square on the computer screen.
4. Done: the screen shows **WhatsApp connected** with the number next to it.

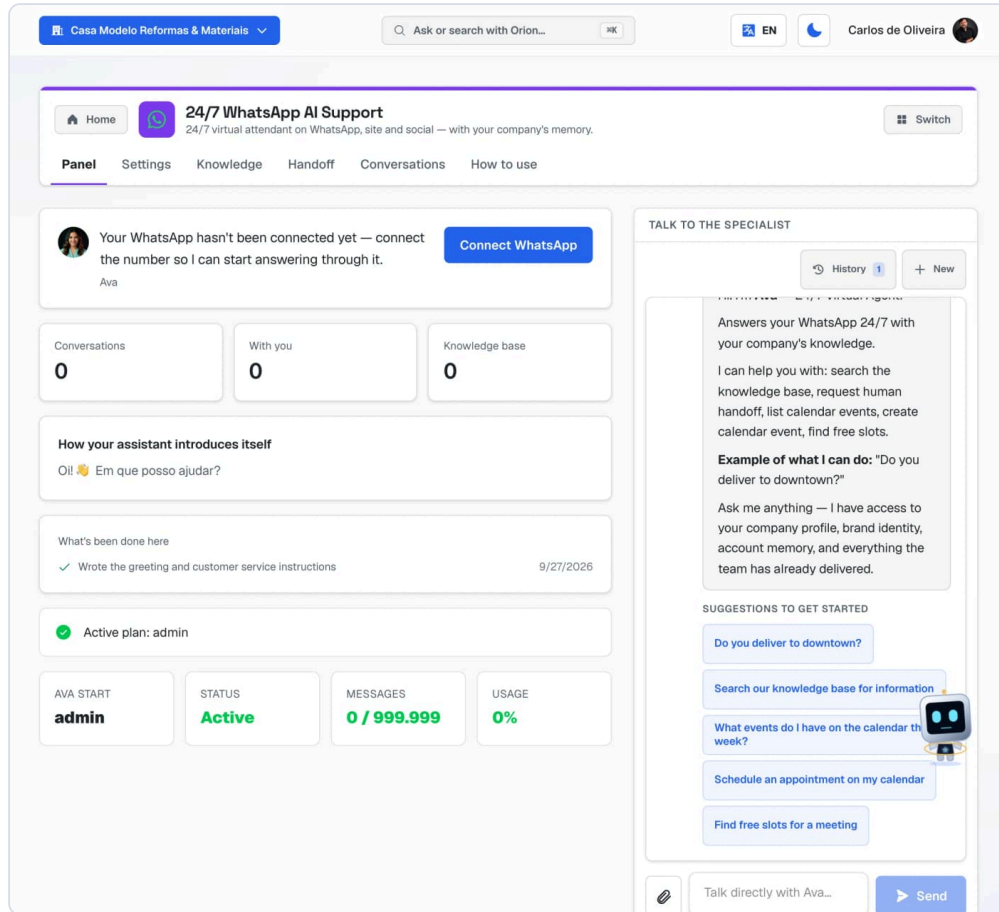
The QR Code **expires quickly**. If it takes too long, click **Generate new QR** and scan again. Only have the phone, no computer? The [Integrations](#) chapter shows the **Connect by code** option, done entirely on the phone.

One important rule for WhatsApp Business

If you use **WhatsApp Business**, turn off its automatic "**Greeting message**" (on the phone: **Business tools** → **Greeting message** → **off**). Ava does the greeting now. With both on, the customer gets two welcome messages in a row — and the contact count the system keeps goes wrong. The **away message** (outside business hours) can stay on.

4. Step 2 — Teach Ava about your business

Where: Home → **Your apps** → **WhatsApp AI** (at the top of the screen it shows as *24/7 WhatsApp AI Support*). The module has six tabs at the top: **Panel**, **Settings**, **Knowledge**, **Handoff**, **Conversations** and **How to use**.



4a. Who she is and how she talks (Settings tab)

 **Identity**

AGENT NAME

Ava

ROLE (PERSONA)

Customer service — Questions, support

TONE OF VOICE

Casual and friendly

 **Messages**

GREETING (FIRST MESSAGE)

Oii! 🌟 Em que posso ajudar?

AFTER-HOURS MESSAGE

Estamos fora do horário comercial agora. Volto a falar com você assim que possível!

SPECIFIC INSTRUCTIONS (OPTIONAL)

E.g. Always offer 5% cash discount. Never promise Sunday delivery.

☒ Ava active (replies on WhatsApp and widget)

Field	What to enter
Agent name	The name the customer sees. Keep "Ava" or change it.
Role (persona)	If you sell services and book visits, choose Sales — Sell, handle objections, close or SDR — Qualify leads and book meetings .
Tone of voice	How she talks. Casual and friendly works well for most services.
Greeting (first message)	The first line the customer reads. Short, with your business name.
After-hours message	What she says when someone writes outside the hours you set below.
Specific instructions	Your house rules, in plain sentences. E.g. " <i>Payment only after the job is done.</i> " " <i>We don't service water heaters.</i> "
Ava active	Keep it checked. Unchecked, she stops answering — it's the pause button.

4b. Business hours

 **Business hours**

Check the days your company is open. The assistant uses this to know when to answer normally and when to use the after-hours message.

TIME ZONE

America/Sao_Paulo

☒ Monday	09:00 	to	18:00 
☒ Tuesday	09:00 	to	18:00 
☒ Wednesday	09:00 	to	18:00 
☒ Thursday	09:00 	to	18:00 
☒ Friday	09:00 	to	18:00 
☐ Saturday	Closed		
☐ Sunday	Closed		

With no day checked, the assistant answers at any time — exactly as it does today.

Check the days your business is open and the hours for each one. Outside those hours Ava keeps answering, but uses the **after-hours message** to say the team will get back later.

With **no** day checked, she answers at any time as if you were always open.

4c. Questions before handing over to you

☰ Qualifying questions

What the assistant needs to find out before handing the contact to you. It asks one at a time, inside the conversation — never as a form.

+ Add question

☒ Ask for a satisfaction rating at the end
When off, the assistant never asks for a rating.

Click **Add question** for each thing you need to know before you take the job. E.g. "*Which neighborhood?*", "*Freestanding stove or cooktop?*". She asks **one at a time**, inside the conversation — never as a form.

Ask for a satisfaction rating: when on, she asks the customer for a 1-to-5 rating at the end.

4d. Get paid by PIX (optional, Brazil only)

💎 Get paid by PIX

When the customer closes, Ava sends the PIX "copy and paste" code with the agreed amount and asks for the receipt. Ava never says the payment was confirmed: the receipt goes to you to check in your account, by WhatsApp and by the handoff e-mail.

☐ Send the PIX when the customer closes

PIX KEY	RECEIVER'S NAME (AS SHOWN BY THE BANK)	RECEIVER'S CITY
CNPJ, CPF, e-mail, mobile or random key		

Check **Send the PIX when the customer closes** and fill in the **PIX key**, the **receiver's name** (exactly as the bank shows it) and the **city**. When the customer closes, she sends the PIX "copy and paste" code with the agreed amount and asks for the receipt. **She never confirms payment** — the receipt goes to you to check in your account.

After changing these cards, click Save configuration (the blue button at the bottom).

4e. Photos, videos and PDFs she can send

 **Photos, videos and documents Ava can send**

Add here what Ava can send to the customer during the chat: your price list as a PDF, photos of finished jobs, a video showing your work. Ava only sends what is on this list and turned on, and only when the conversation calls for it.

Each file is saved right away, no need for the Save button above.

FILE

 Choose file

Photo (JPG, PNG or WEBP) up to 5 MB · MP4 video up to 16 MB · PDF up to 20 MB

TITLE

E.g.: 2026 price list

WHEN TO SEND

E.g.: when the customer asks for photos of finished jobs

In a few words, when Ava should send this file.

Add to the list



No files yet

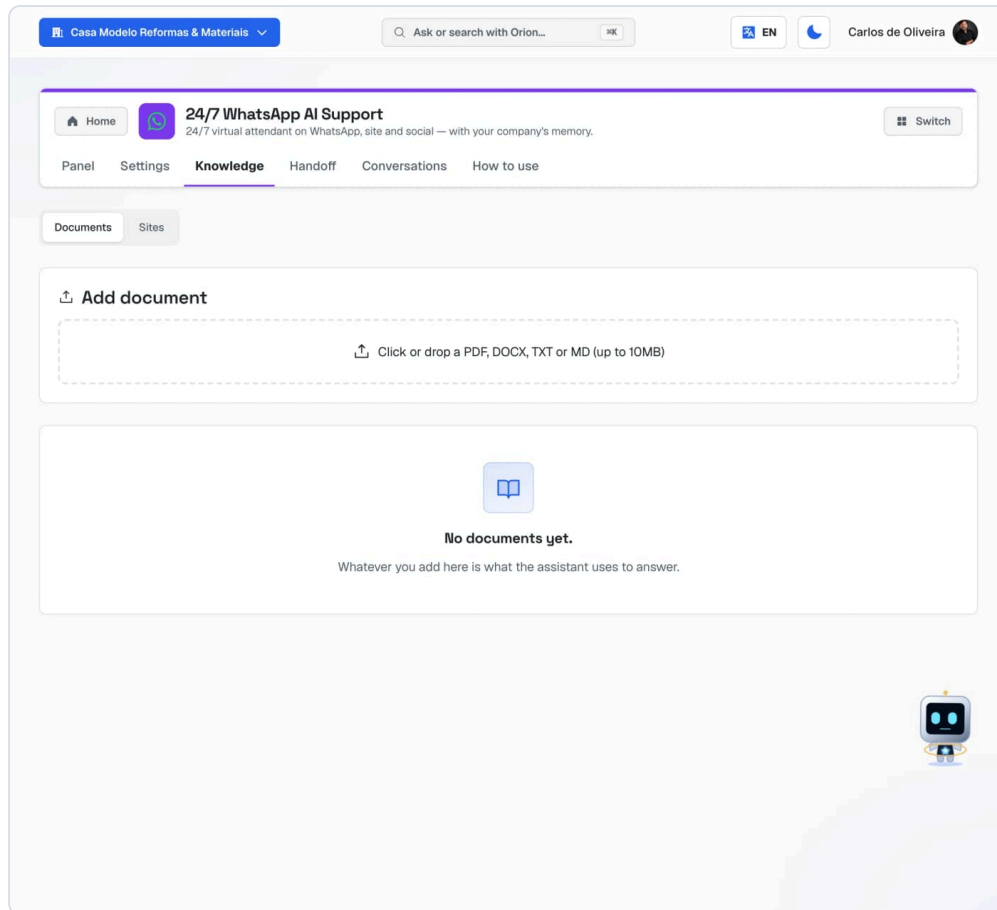
Add a photo, a video or a PDF above, and Ava will be able to send it to the customer when it makes sense.

Add here what Ava may send to the customer: your price list as a PDF, photos of finished jobs, a video of your work. For each file:

1. **Choose file** (photo up to 5 MB, MP4 video up to 16 MB, PDF up to 20 MB);
2. **Title** — e.g. "2026 price list";
3. **When to send** — e.g. "when the customer asks for the price list";
4. **Add to the list**. This card saves right away, no Save button needed.

She only sends what is on this list, and only when the conversation calls for it.

4f. The knowledge base (Knowledge tab)



This is where Ava gets her answers. On the **Documents** sub-tab, drop your price list, your list of services, the questions customers ask most. On the **Sites** sub-tab, paste your website address so she reads it.

Wait for each source to be **ready** before testing. Empty knowledge base = generic answers.

Golden tip: write it the way you'd explain it to a new employee. *"Stove conversion: \$40 to \$55, depends on the model. We cover the North and East side. We don't do water heaters."* A simple sentence beats a pretty document.

5. Step 3 — Tell her when to call you

Where: Handoff tab.

Handoff

Ava handles chats on her own, 24/7. She hands the conversation over to you in these cases: when the customer uses one of the keywords below, openly asks for a person, or shows strong buying or complaint intent. At that point you get an alert on each contact set below (WhatsApp and email). When the customer writes again, Ava waits up to 5 minutes for your reply; if nobody replies, she takes over again and carries on, without waiting again. Marking the conversation as resolved (Return to AI) brings Ava back right away. With nobody set up to receive the alert, Ava doesn't wait: she keeps helping.

When to transfer to a human

KEYWORDS THAT TRIGGER HANDOFF (COMMA SEPARATED)

humano, atendente, reclamação, cancelar, urgente, falar com pessoa

When the customer mentions one of these words, OR openly asks for a human, OR shows strong buying/complaint intent, Ava flags the conversation for you to take over.

Where to notify

This is where the alert lands when Ava calls you. Fill in at least the WhatsApp number or the email so you never miss a handoff.

RESPONSIBLE PERSON'S WHATSAPP (COUNTRY CODE + AREA CODE + NUMBER)

+5511999999999

RESPONSIBLE EMAIL

sales@yourcompany.com

Save handoff

1. In **Keywords that trigger handoff**, keep the ready-made ones and add your own, separated by commas.
2. In **Responsible person's WhatsApp**, enter the phone of whoever gets the alert — with **country code + area code + number**, no spaces. E.g. 5511999998888.
3. In **Responsible email**, the email of whoever gets the alert.
4. Click **Save handoff**.

With nobody set up here, Ava has no one to call — she keeps helping on her own. Fill in at least the WhatsApp.

6. Step 4 — Set up your team's schedule

With your team added, **Ava books the visit by herself and picks who goes**: she offers two real free slots, the customer picks one, she confirms right there and the person who's going gets the alert on WhatsApp. **No Google needed** — the schedule lives here in the panel, on the **Schedule** tab.

With and without a team — what changes

	Nobody added	Team added
What Ava offers	A day and a time window, and asks for the address with zip code	Two free slots , already saying who goes
Who confirms	Your team , on WhatsApp — she says <i>"the team will confirm the time"</i>	She does: <i>"Booked: Tuesday, 9 to 11, with Technician 1"</i>
Who finds out	You, reading the conversation	The person who's going, on WhatsApp, and you, on the Schedule tab

Both ways work. Without a team you don't lose the customer — you just confirm the time by hand.

Add who does the visits

Where: Ava's **Settings** tab → **Team on call** card.

 **Team on call**

Ava spreads visits across the 2 active person(s); offers two day-and-time options, picks who goes by area and that day's load, confirms to the customer and alerts the person on WhatsApp.

Técnico A
no alert phone · does every service

Edit ☒ active

Técnico B
no alert phone · does every service

Edit ☒ active

+ Add person

VISIT START TIMES (OPTIONAL)

09:00, 11:00, 14:00

With start times, each visit runs until the next one (e.g. 9 to 11). Empty = free times within business hours, with the length below. Days and hours come from Business hours.

DEFAULT LENGTH (MINUTES)

60

Save times

1. Click **+ Add person**.
2. Fill in the **Name** — a technician, a professional or a department (*"Technician 1"*, *"Dr. Ana"*, *"Billing"*).
3. If you like, also fill in:
 - **Alert phone** — the number where the person gets each booked visit (day, time, service, address and the customer's contact). Without a phone, the visit only shows on the **Schedule** tab.
 - **Gmail** — to get a copy of each visit in their Google Calendar (see *Optional — Google Calendar*, below).
 - **Services** — separated by commas. **Empty means they do everything**. Use it when each person does something different (Ava only offers who does the requested service).
4. Click **Save person**. Repeat for each person.

The **active** box next to each name takes the person out of upcoming bookings without deleting anything — use it when someone goes on vacation or leaves.

Visit times

On the same card, below:

- **Visit start times** — if you work in windows (e.g. 09:00, 11:00, 14:00), write them here. Each visit runs **until the next start time**: 9 to 11, 11 to 14, and the last one until closing.
- **Empty** — Ava offers free times within business hours, with the **Default length**.

Click **Save times. Days and hours come from Business hours** (part 4b): if Saturday is open until 2 pm there, she books on Saturday until 2 pm.

A service that takes longer? Write how long it takes in the knowledge base or in the **Specific instructions** ("*pipe installation: 5 hours*"). Ava reserves the following windows for it.

How Ava picks who goes

For each free slot, she picks in this order:

1. **The person the customer asked for** ("*I want Dr. Ana*"), if they're on the team.
2. **Who does** the requested service.
3. **Who already has a visit in the same area** that day (by zip code) — so the technician doesn't cross the city.
4. **Who has the fewest visits** that day.

Two customers never get the same slot with the same person: if someone just took it, she offers another.

Optional — Google Calendar

Google is used for two things:

- **With a team:** each visit gets **a copy in the Google Calendar** of whoever has a Gmail added (that person's calendar must be shared with the business account connected here). If the person has no Gmail, the copy goes to the connected account's own calendar, with the person's name in the title.
- **Without a team:** Ava books **straight into the Google calendar** of the connected account (9 am to 6 pm, Monday to Friday, with 15 minutes between appointments).

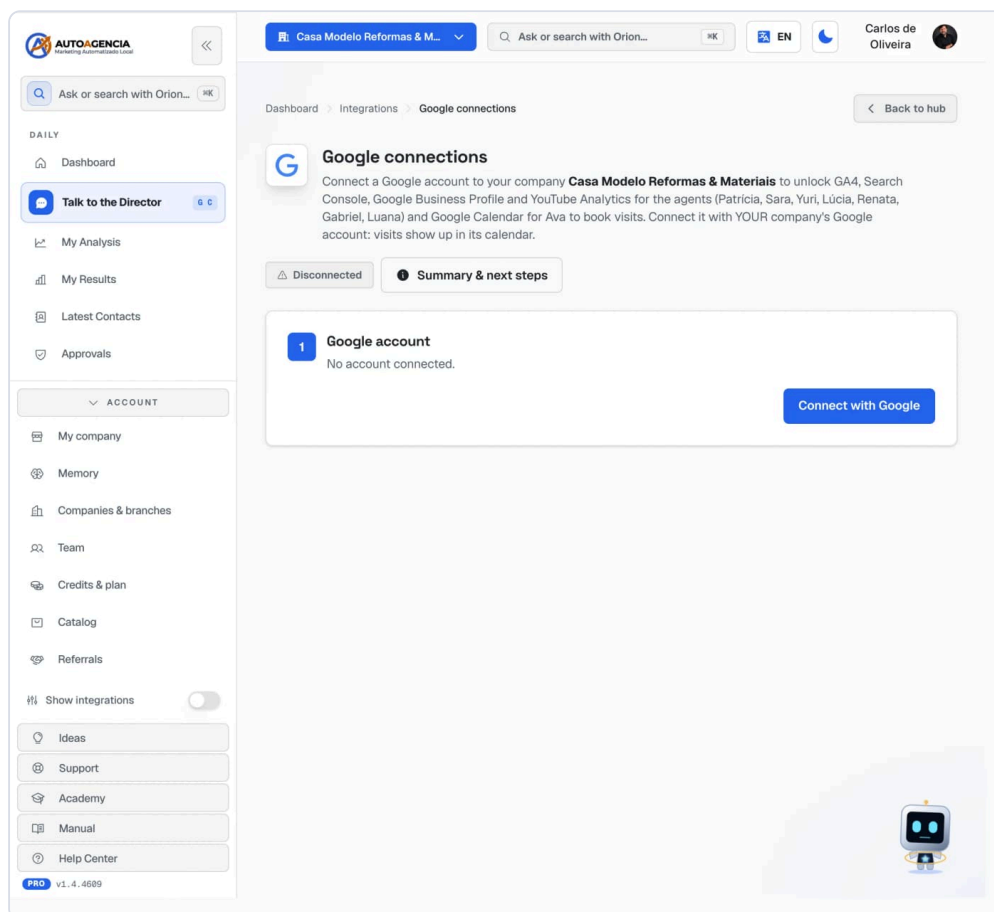
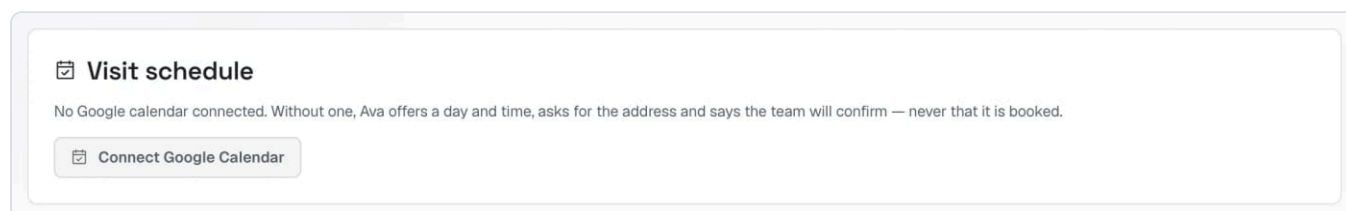
If you need neither, skip this part.

The rule you can't skip

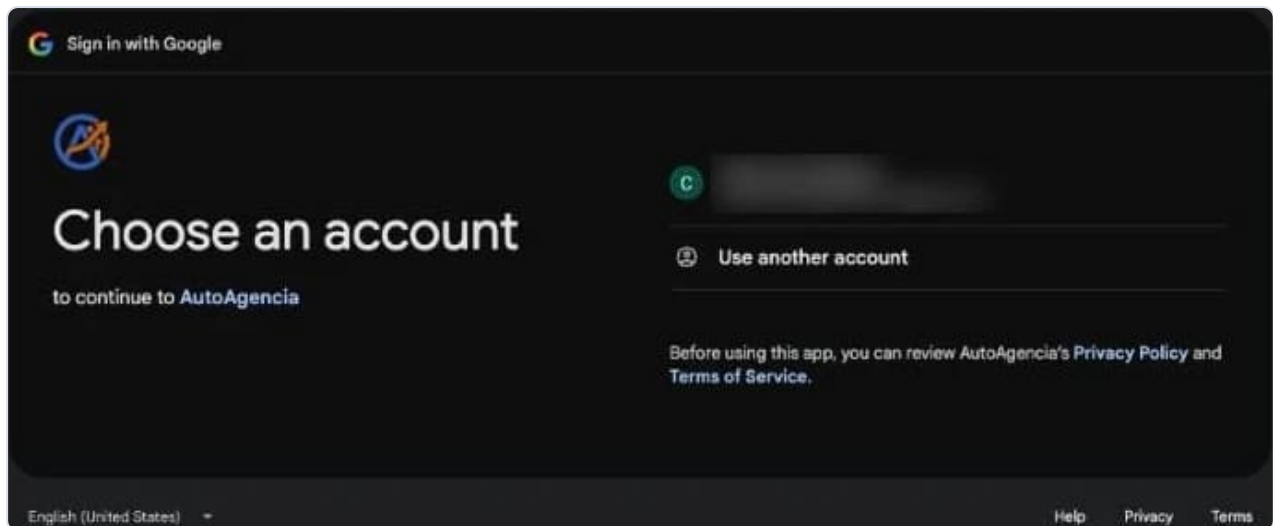
Make this connection yourself, signed in to the panel with YOUR login, and pick the business Google account. The system connects the Google account of **whoever is signed in**. If your agency or a relative connects it for you, **their** calendar gets connected — and your customers' visits end up on the wrong calendar.

Step by step

Where: menu → **All connections** → **Google connections** card. There's also a shortcut: on Ava's **Settings** tab, **Visit schedule** card, **Connect Google Calendar** button.



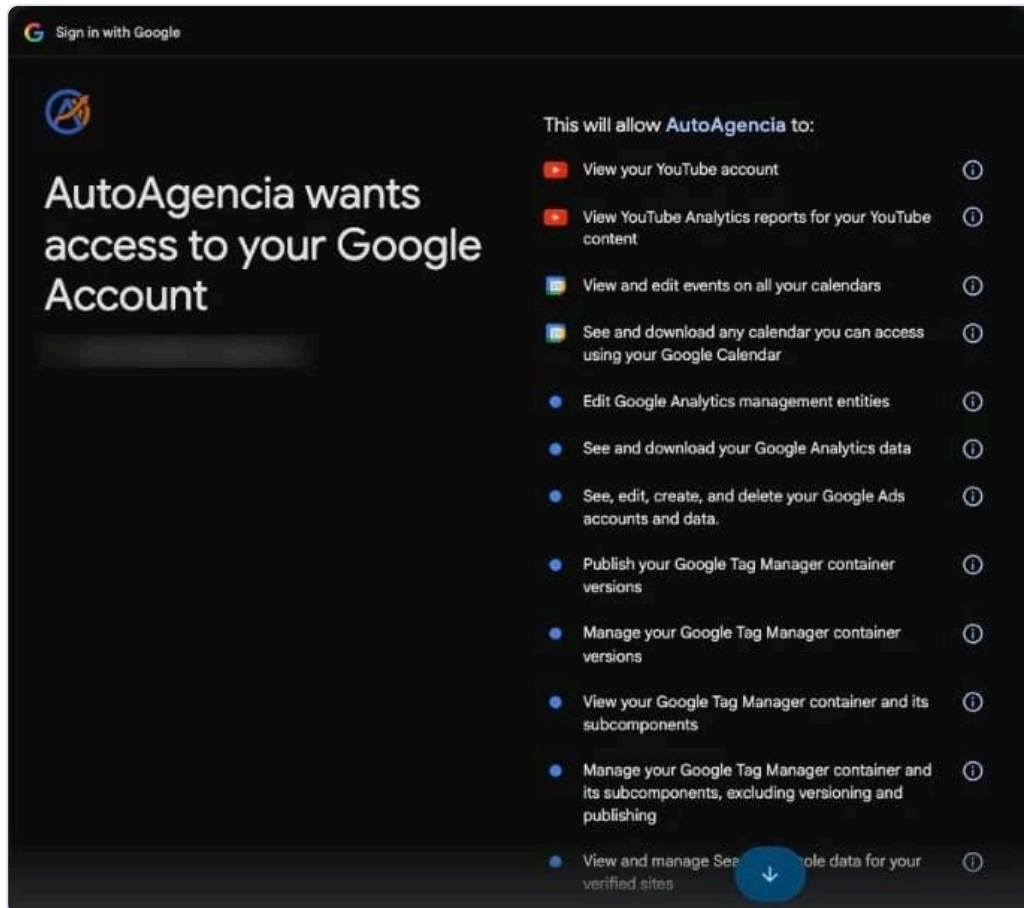
1. Click **Connect with Google**.
2. **This is where you leave the panel and go to a Google screen.** On **Choose an account**, click your business Google account (if there's more than one, check the email carefully).



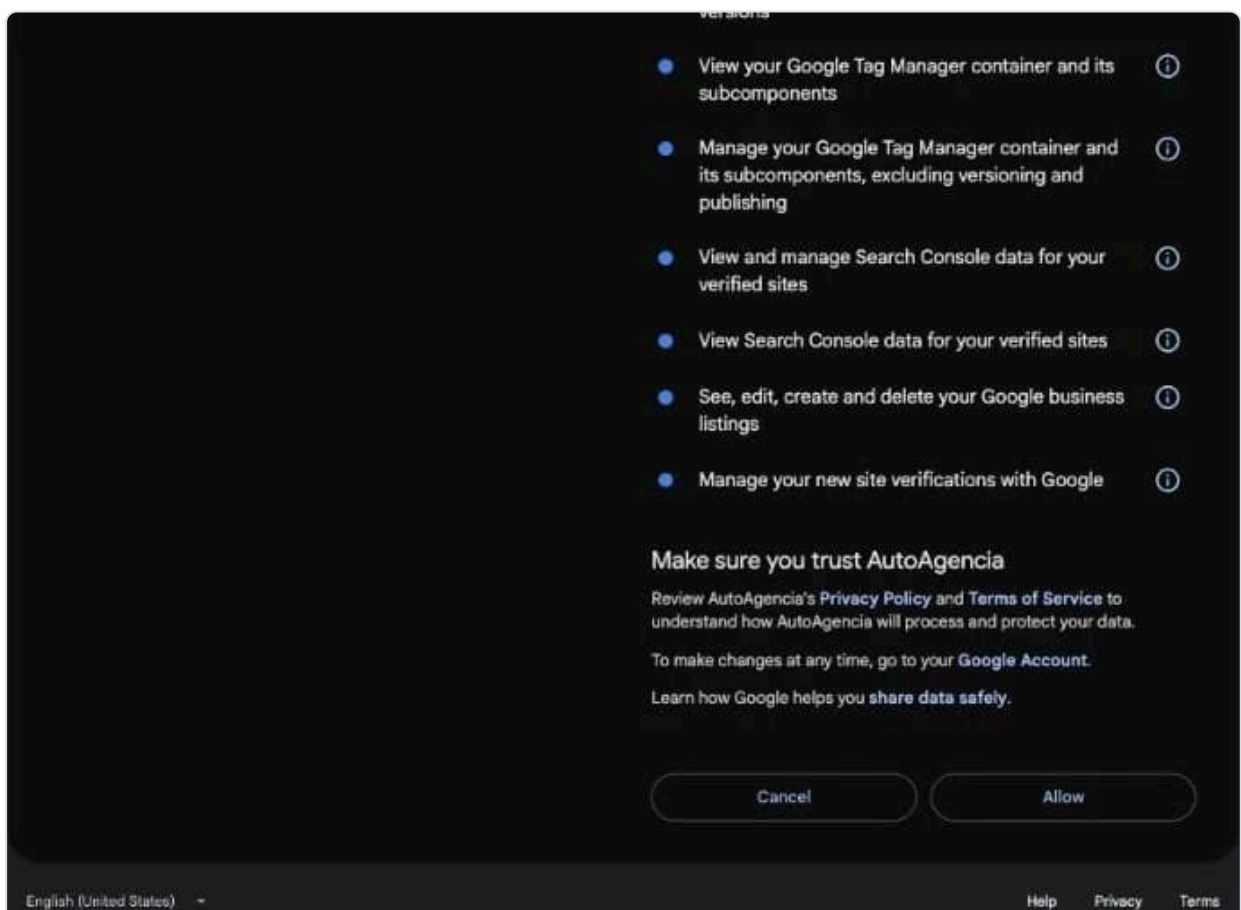
3. Google may ask you to **confirm it's you** (password, fingerprint or phone). That's Google protecting your account — confirm the way it asks.
4. If your business has a YouTube channel, Google shows a screen asking you to choose **your account or a brand account**. Pick **your account** (the top one, with your email) — not the channel.



5. Google now shows **AutoAgencia wants access to your Google Account** and the list of what it will be able to do. Check that the two **Google Calendar** lines are there ("View and edit events on all your calendars"). If you see **checkboxes** next to the items, **check them all** — especially the Google Calendar ones; whatever you don't allow, Ava can't use.



6. Scroll to the end of the list and click **Allow**. You're taken back to the panel with the message **Google account connected!** (If the screen still says "Disconnected", reload the page.)





Google account

Connected as

Connected resources: Google Ads · Google Analytics · Search Console · Google Business · YouTube · Google Calendar · Tag Manager

[\[→ Disconnect\]](#)

What about "2. IDs per product" further down? That part is for other modules (website and Google reports). **For Ava's calendar, you can stop here.**

Allow Google for Ava

Go back to Ava's module → **Settings** tab → **Visit schedule** card.

Visit schedule

☒ Ava can book visits on the Google calendar

Unchecked, Ava offers a day and time, asks for the address and says the team will confirm — never that it is booked.

- **Box checked** → with a team, visits get the copy in Google; without a team, Ava books straight into the Google calendar.
- **Box unchecked** → with a team, nothing changes in the conversation (there's just no copy in Google); without a team, she goes back to the "no calendar" way: offers a day and time, asks for the address with zip code and says the team will confirm.

Check the email next to the box: **that's the calendar where visits will go**. Then click **Save configuration**.

Seeing an orange warning?

Visit schedule

☐ Ava can book visits on the Google calendar

Unchecked, Ava offers a day and time, asks for the address and says the team will confirm — never that it is booked.

This Google account belongs to the AutoAgência team, not to your company, so it stays unchecked until you check it. Ideally, connect your company's calendar in Integrations. [Open Google connections](#)

It means **our team connected it**, not you — that's why the box stays unchecked, so your visits don't land on our calendar. Follow the **Open Google connections** link, click **Disconnect** and connect again **signed in with your own login**, as in the step by step above.

7. Using the schedule day to day

How Ava books a visit

1. The customer asks for a time on WhatsApp.
2. Ava asks for what's missing — **name, service and address with zip code** — and offers **two options** of day and time, already with who goes.
3. The customer picks one. She books it and replies "*Booked: Thursday, 9 to 11, with Technician 1*".
4. The person who's going gets the alert on WhatsApp, and the customer gets a **WhatsApp reminder** one day and one hour before the visit.

Where you see the visits

On the **Schedule** tab of Ava's module: the visits for the next 7 days, by day, with the time, who goes, the service, the customer and the address.

The screenshot shows the Ava module interface. At the top, there's a header with a dropdown menu set to 'Casa Modelo Reformas & Materials', a search bar 'Ask or search with Orion...', and user information 'Carlos de Oliveira'. Below the header is a navigation bar with tabs: Home, 24/7 WhatsApp AI Support (active), Settings, Knowledge, Handoff, Conversations, Schedule, and How to use. The main content area is titled 'Team schedule' with a 'Block time' button. It shows a list of visits for 'Friday, 10/02'. The first visit is from 09:00-11:00, assigned to 'Técnico A', with service 'pintura da sala' and address 'Rua Vergueiro 300, Vila Mariana — 04101-000'. It has 'Reschedule' and 'Cancel' buttons. The second visit is from 12:00-13:00, assigned to 'Técnico B', with status 'Blocked' and reason 'Almoço'. It has a 'Free up' button.

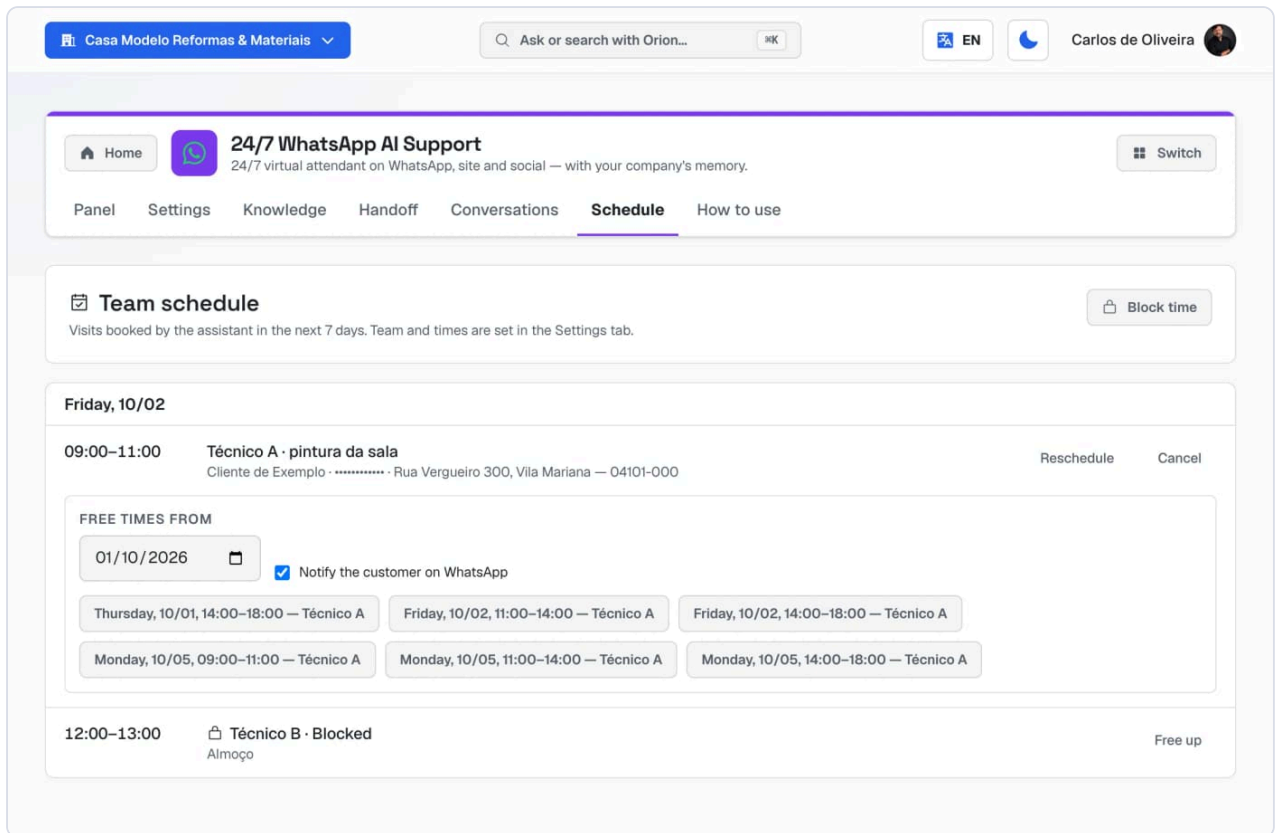
Friday, 10/02			
09:00–11:00	Técnico A · pintura da sala Cliente de Exemplo · · Rua Vergueiro 300, Vila Mariana — 04101-000	Reschedule	Cancel
12:00–13:00	Técnico B · Blocked Almoço		Free up

Whoever has a Gmail added also sees their own visits in **Google Calendar** on their phone (part 6, *Optional — Google Calendar*).

Rescheduling or cancelling

- **The customer asks on WhatsApp:** Ava changes the time or cancels, and alerts the team member.
- **You need to cancel:** **Schedule** tab → **Cancel** on the visit. The team member gets the alert; let the customer know in the conversation.

- **You need to change the time:** **Schedule** tab → **Reschedule** on the visit. The next free times show up (with who goes); to see other days, change the date in **Free times from**. Click the time you want: the team member is alerted and, with the **Notify the customer on WhatsApp** box checked, the customer gets the new time.



Blocking a day or a time

- **Lunch, a day off, a holiday, an appointment:** **Schedule** tab → **Block time**. Pick **who** (one person or **the whole team**), the **day**, **from** and **to**, and a reason if you like, then click **Block**. Ava won't offer anything inside the block. It shows on the schedule with a lock and the **Free up** button. Anyone who already has a visit at that time isn't blocked — the message says who, so you can reschedule or cancel first.

Casa Modelo Reformas & Materiais

Ask or search with Orion...

EN

Carlos de Oliveira

Home

24/7 WhatsApp AI Support

24/7 virtual attendant on WhatsApp, site and social — with your company's memory.

Switch

Panel Settings Knowledge Handoff Conversations **Schedule** How to use

Team schedule

Block time

Visits booked by the assistant in the next 7 days. Team and times are set in the Settings tab.

The assistant won't offer any time inside the block. Use it for lunch, a day off, a holiday or an appointment.

WHO DAY FROM TO

The whole team 01/10/2026 12:00 13:00

REASON (OPTIONAL)

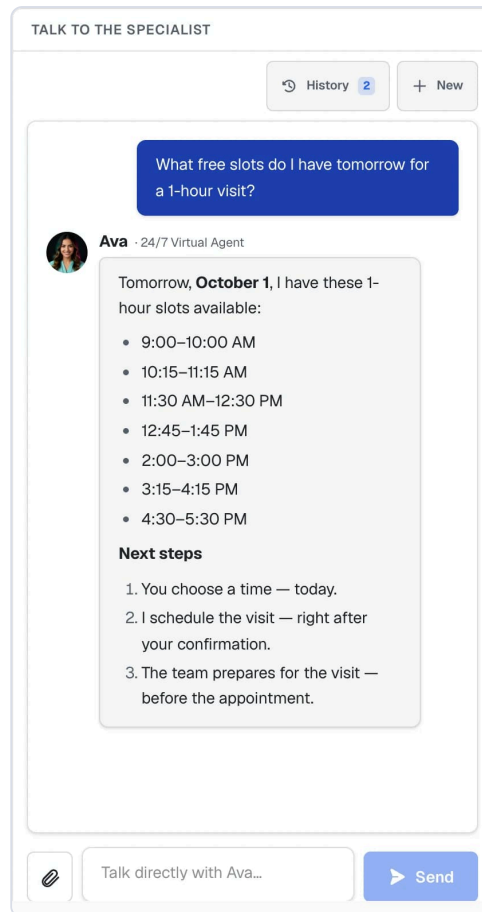
Lunch, day off, holiday...

Block

- **Someone on vacation:** uncheck **active** next to their name on the **Team on call** card, and check it again when they're back. Visits already booked stay.
- **Whoever has a Gmail:** an event in that person's Google Calendar also blocks the time.

Asking Ava about the calendar

On the module's **Panel**, the chat with Ava (**Talk to the specialist** box) takes questions like "What free slots do I have tomorrow for a 1-hour visit?". That chat reads the **connected Google calendar** — with a team, check the visits on the **Schedule** tab.

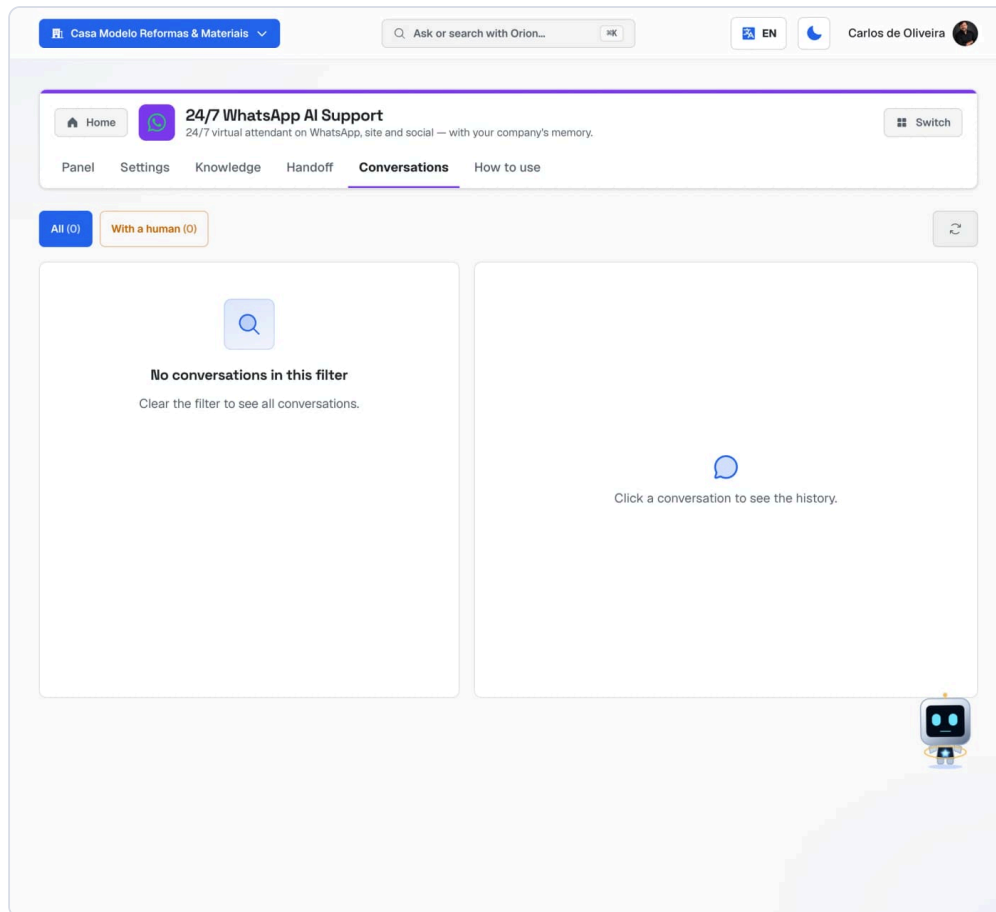


Turning the schedule off

- **Stop booking with the team:** uncheck **active** for everyone. Ava goes back to offering a day and time window and saying the team will confirm.
- **Stop the copy in Google:** uncheck the box on **Visit schedule** and save; or **Google connections** → **Disconnect**. Visits already copied stay in Google Calendar.

8. Following the conversations

Where: Conversations tab.



- **All** shows every conversation Ava handled. Click one to read it all — including the text of the audios the customer sent.
- **With a human** shows the ones she handed over to you.

Taking over and handing back

- **To take over:** reply to the customer **from the phone's WhatsApp**, as usual. Ava notices and waits up to 5 minutes for your reply before speaking again.
- **To hand back to Ava:** in the conversation, use **Return to AI**. She's back right away.

The Panel

The **Panel** tab shows, at the top, whether WhatsApp is connected and three numbers: **Conversations**, **With you** (the ones waiting for a person) and **Knowledge base** (how many sources she has read).

9. Frequently asked questions

Does Ava answer voice messages? Yes. She listens to the audio, understands it and replies. If the customer spoke, she can reply with audio too.

What if the customer sends a photo of the stove or the problem? She looks at the photo and replies to what she saw. Photos, PDFs and videos are read the same way.

Can she give discounts on her own? Only what you write in **Specific instructions** or in the knowledge base. Without a written rule, she doesn't make up a discount.

Can I pause Ava? Yes: uncheck **Ava active** on the Settings tab and save. To resume, check it again.

Does Ava book visits on Saturday? With a team added, **yes**: she follows the days and hours in **Business hours** (part 4b). If Saturday is open from 8 am to 2 pm, she offers Saturday slots until 2 pm. (Without a team, booking straight into Google Calendar, she only looks Monday to Friday.)

I have more than one technician. Does each have a schedule? Yes: add each one on the **Team on call** card (part 6). Ava spreads the visits across them by area and by that day's schedule, and each one gets theirs on WhatsApp.

Can each person have different days and hours? Not yet — everyone follows the business's **Business hours**. To take someone out for a day or a time, use **Block time** on the **Schedule** tab.

What about Rebeca and Sérgio? They're the other AutoAgency assistants: **Rebeca** answers Instagram, Messenger, email and WhatsApp in one inbox, and **Sérgio** answers the **chat bubble on your website** — and also books visits with your team. Each has their own guide: [Rebeca's Guide](#) and [Sérgio's Guide](#).

10. When something goes wrong

What happens	What to do
Ava doesn't answer anyone	Check on the Panel that WhatsApp is connected. If it is, check that Ava active is checked.
The customer gets two welcome messages	Turn off WhatsApp Business's Greeting message on the phone (part 3).
She says "I don't have that information"	It's missing from the knowledge base. Add it on the Knowledge tab or in Specific instructions .
Ava doesn't offer times with the team	Check on the Team on call card that there are people with active checked, and in Business hours that the days are open.
The team member didn't get the alert	Check their Alert phone (with area code) and that the business WhatsApp is connected (part 3). The visit is on the Schedule tab either way.
Google copies are going to the wrong calendar	Check the email on the Visit schedule card. If it isn't the business one, disconnect and connect again with your own login (part 6).
The Google calendar box doesn't show	The Google account isn't connected, or was connected without the Google Calendar permission. Connect again allowing everything.
Nobody is alerted when she hands over	Fill in the Responsible person's WhatsApp on the Handoff tab.
The QR Code vanished before scanning	Click Generate new QR and scan again.

Still have questions? In the full menu, use **Talk to the Director** — our team answers there. The [Academy and help](#) chapter shows the way.