# Geniusflow AI

***Agent Quick Reference — Q&A Handbook***

A printable guide for independent life insurance agents.

## Getting Started

**Q: How do I log in?**
A: Go to your Geniusflow AI dashboard URL and sign in with the email your agency invited. Use the magic link or your password. If you forgot it, click "Forgot password".

**Q: Where is my dashboard?**
A: After logging in, you'll land on the Pipeline view by default. Use the top nav to switch between Leads, Resources, and Settings.

## Working Leads

**Q: Where do I find new leads?**
A: Open the Pipeline (Agent dashboard). New leads appear at the top with an "Unworked" badge. Click a lead to open its detail view.

**Q: What does the lead score mean?**
A: The AI lead score (0–100) reflects intent and fit. Scores above 70 are hot — call within 5 minutes. 40–70 are warm. Below 40, nurture via SMS or email.

**Q: How does AI voice calling work?**
A: From the lead detail page, click "AI Call" to have the Geniusflow voice agent reach out, qualify, and book a follow-up on your calendar.

## Proposals & Getting Paid

**Q: How do I create a proposal?**
A: From a lead, click "Create Proposal", pick Term / Whole Life / IUL, set the face amount and premium, and send. The client signs in-browser.

**Q: How do I get paid?**
A: Commissions flow through your connected Stripe account. Update your bank in Stripe: Settings → Business settings → Bank accounts and scheduling.

## Billing & Cancellation

**Q: What does it cost?**
A: See the Pricing page in your dashboard. Plans are monthly and include lead credits, AI minutes, and CRM seats.

**Q: How do I cancel?**

A: Go to Settings → Billing → Manage subscription. You can pause or cancel any time; access continues through the end of the billing period.

## Support

**Q: Who do I contact for help?**
A: Email support@geniusflow.ai for product questions, or sales@geniusflow.ai for plan changes.