

# Link Box AI: New User Onboarding Script

## Introduction: Setting the Stage for Success

*Internal Note: This script is designed to provide a warm, professional, and effective onboarding experience for new Link Box AI users. Your primary goal is to build confidence, demonstrate the platform's core value, and leave the user feeling empowered and excited.*"Hello, and thank you for calling Link Box AI support. My name is Rep Name, and I'm here to help you get started. I understand you're a new user, and my goal today is to personally guide you through the setup process so you can start unifying your digital life right away. We'll create your account, configure your privacy settings, and import your first piece of data. How does that sound?"*(Pause and wait for the user's confirmation before proceeding.)*

## Part 1: Account Creation & Privacy Configuration

*Internal Note: **Goal:** Build foundational trust. This section establishes the user's secure account and introduces our core "Privacy First" philosophy. By the end, the user should feel confident that their data is safe and under their control.*

### 1.1. Platform Selection & Installation

"Excellent. To begin, which device are you primarily using right now: an iPhone, an Android phone, or are you on a computer using a web browser?"*(Listen for the user's answer and provide the appropriate instruction.)***For iOS:** "Perfect. Please open the App Store on your iPhone and search for 'Link Box AI.' Once you find it, go ahead and download the application."**For Android:** "Great. Please open the Google Play Store on your phone, search for 'Link Box AI,' and install the app."**For Web:** "Okay, please open a new browser tab and navigate to **app.linkbox.ai**."

### 1.2. Account Sign-Up Walkthrough

"Once the app or website is open, you should see the main welcome screen. Let's create your account together.

1. First, please tap the 'Sign Up' button.
2. Next, enter your preferred email address and create a secure password. Let me know when you've done that.
3. Great. The system has just sent a verification link to your email. Could you please open your email and click that link to confirm your account? I'll wait right here."*(Pause until the user confirms they have verified their email.)*

### 1.3. Explaining Privacy Settings

"Fantastic, your account is now active. Before we go any further, I want to briefly touch on something that is fundamental to Link Box AI: your privacy. Our entire platform is built on a '**Privacy First**' philosophy. This means that by default, all of your data and any AI processing happens locally on your own device. **Your data never leaves your control.** It is never shared without your explicit permission. Later, if you choose, you can enable an optional, fully encrypted

cloud backup in the Settings menu. But that is entirely your choice. We believe you should always be in complete control of your data."*(Internal Note: This is our most important trust-building moment. Speak calmly and confidently. Reassure the user that this philosophy is central to everything we do.)*With your secure account now in place, the exciting part begins: making the platform truly yours by connecting your digital life.

## Part 2: The First Capture - Importing Your Digital Life

*Internal Note: **Goal:** Deliver the "aha!" moment. By the end of this section, the user should see their own data inside the app and grasp the value of a unified platform. Your goal is to make this process feel simple and rewarding.*

### 2.1. The Manual First Step

"On the main screen of the app, you'll see a '+' button. Let's start by adding your first manual entry. Go ahead and tap that button. For this first entry, let's start with something simple. You can add a quick note, perhaps a goal you have for using the app or just a simple 'Hello World.' This will help you get familiar with the interface."*(Wait for the user to confirm they've added their first note.)*

### 2.2. Guided Data Integration

"Well done. Now, to really see the power of Link Box AI, what part of your digital life would you like to connect first? We can start with your calendar, social media, health data, or financial accounts."*(Listen for the user's choice and proceed to the relevant section below.)*

### 2.3. Platform-Specific Import Walkthrough

"Great choice. Syncing your calendar provides smart scheduling and automatic meeting briefings. Let's connect your Google Calendar.

1. In the app, let's find the **Settings** area. From there, look for a section called **'Integrations'** or **'Connected Services'** .
2. You should see an option for **Google Calendar** . Once you select it, you'll be prompted to sign in with your Google account and grant Link Box permission. After that, your events will begin to sync automatically. ""Excellent. Let's save a post from a platform like Instagram or Twitter. This is incredibly easy to do from your phone.
3. Please open the social media app of your choice and find a post you'd like to save.
4. Tap the 'Share' button on that post, and from the list of apps that appears, select 'Link Box AI.' The post will be instantly and automatically imported into your account. ""Connecting your health data is a great way to get a holistic view of your wellness.
5. Let's go to **Settings** within the Link Box app, then find the section for **'Health & Wellness'** .
6. Tap 'Connect to Apple Health' if you're on an iPhone, or 'Connect to Google Fit' on Android. You will then be asked to grant permissions for the specific data you'd like to sync, such as steps, workouts, or sleep. ""Okay, let's connect a financial account. I want to assure you this process is highly secure, using bank-level 256-bit encryption and read-only access, meaning the app can never move your money.

7. Let's find the financial section in the app. It might be labeled **'Finance'** or **'Accounts'** .
8. Once you're there, look for an option like **'Add Account'** or **'Link Bank'** . Search for your bank and follow the on-screen prompts to enter your online banking credentials. Your transactions will then begin to import automatically."Now that we have some data flowing in, let's explore some of the unique features that make Link Box AI feel truly integrated with your device.

### Part 3: Unlocking Your Platform's Superpowers

*Internal Note: **Goal:** Solidify the app's value. By highlighting a powerful, native feature, we make the app feel indispensable—a core part of the user's daily workflow, not just another application on their device.*

#### 3.1. Identifying the User's Platform

"Great, now that we have some data in your account, let's set up a quick shortcut that makes Link Box AI even easier to use on your specific device. Are you on an iPhone, an Android phone, or the web?"(Listen for the user's answer and proceed to the relevant section.)

#### 3.2. Platform-Specific Feature Setup

"Perfect. On your iPhone, you can use Siri to capture information hands-free. Let's set that up from within the Link Box app.

1. Please go to **Settings** inside the Link Box app, then look for a **Siri Shortcuts** menu.
2. From there, you should see a list of actions you can add to Siri, like our example, **'Add this to my knowledge base.'**
3. Simply tap the plus sign next to it and record your phrase. Once set up, you can use this command anytime to quickly save ideas."Excellent. You can control Link Box AI using just your voice with Google Assistant. Let's enable it.
4. Open your **Google Assistant settings** .
5. Navigate to **Services** and find **Link Box AI** in the list.
6. Sign in with your Link Box AI account to grant permission. Now, you can say things like, **"Hey Google, ask Link Box to show my summary"** to get instant updates."Great. The browser extension is the best way to use Link Box AI on the web. Let's install it.
7. If you are using Chrome or Edge, please visit the **Chrome Web Store** and search for 'Link Box AI'.
8. Click **'Add to Chrome'** to install the extension.
9. Once installed, you can click the extension's icon to capture any webpage with a single click, saving articles, research, and inspiration effortlessly."Setting up these integrations shows how Link Box AI is designed to fit seamlessly into your existing digital ecosystem.

### Part 4: The Big Picture & Next Steps

*Internal Note: **Goal:** Empower the user for long-term success. This final section summarizes their achievements and provides a glimpse into the platform's deeper capabilities, leaving them excited to explore on their own.*

#### 4.1. The Power of Your Knowledge Graph

"As you continue to add more data—from notes and articles to health and financial data—Link Box AI begins to build your **Personal Knowledge Graph** . You can find it in the main menu. Think of it as a smart system that automatically connects the dots between all your information. It helps you discover relationships between your ideas, meetings, and research that you might never have noticed otherwise. It's a powerful tool that grows more intelligent the more you use it."

#### 4.2. Introducing the Link Box Hub

"I also want to briefly mention the **Link Box Hub** . It's our dedicated hardware device—a small, sleek, matte black cube with a subtle blue light at its base, just like in the pictures on our site. It can run all the AI processing for your entire smart home, ensuring ultimate privacy and performance. It's available for pre-order on our website for \$1,299 if you're interested in taking your personal AI to the next level."

#### 4.3. Support Resources & Wrap-Up

"We've accomplished a lot on this call: you've successfully created your account, configured your privacy settings, and started importing your digital life. As you continue to explore, please know that we have plenty of resources to help you. You can visit our **Help Center** at [help.linkbox.ai](https://help.linkbox.ai), join the conversation in our **community forum** , or start a **Live Chat** with us directly from within the app. And of course, you can always reach us by **email** at [support@bb23llc.com](mailto:support@bb23llc.com) or by **phone** at (909) 800-8218, which is available 24/7. You're all set up and ready to go. Thank you for choosing Link Box AI, and we're excited to see how you use it to unify your digital world. Have a wonderful day!"

#### Appendix: CSR Quick Reference Guide

*Internal Note: This appendix is for your reference only and should not be read to the user. Use it to quickly answer common questions that may arise during the call.*

#### 4.1. Top 3 Troubleshooting Scenarios

- **Sync Not Working:** Ensure Background App Refresh is enabled; Force Sync in settings.
- **Health Data Not Syncing:** Check permissions in iOS/Android Health settings.
- **Voice Recognition Issues:** Retrain voice model in settings; check mic permissions.

#### 4.2. Key Privacy & Security Facts

- **Encryption:** Data is protected with AES-256 at rest and TLS 1.3 in transit.
- **Data Location:** Primarily on your device; AI processing is local.
- **Compliance:** SOC 2 Type II Certified and GDPR Compliant.
- **Financial Sync:** Uses secure, read-only access.

#### 4.3. Platform Comparison Cheat Sheet

Feature, iOS, Android, Web, Hub

Local AI Processing, ✓, ✓, ✓, ✓  
Voice Control, Siri, Assistant, Browser, Always-On  
Offline Mode, Full, Full, Full, Full  
Smart Home, HomeKit, Google Home, Limited, Full  
Storage, Device, Device, Browser, 1TB NVMe  
Price, Free\*, Free\*, Free\*, "\$1,299"  
*Free with optional PRO subscription (\$9.99/ month)*