



THE COMPLETE FEATURE GUIDE

47 capabilities. One clear system.

A practical guide to the Colony, AI-assistant, booking and safeguards. Know what each part does, and what must be configured before it works.

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Availability depends on your plan, license, account connections and approved activation. This is a product guide, not proof that all features are active in every account.

CAPABILITIES 01-05

The Colony

See your pipeline and follow the work. The Colony is your dashboard, not the service that texts clients.

01 Your pipeline as a 3D Colony

Districts for Prospecting, Line Cleaner & Scrub, PitchPrfct Texting, Cal.com Scheduling, Flagged/Stuck, Ad Command, Marketing Tower and Client Gateway. The reserved district is labeled Future update; calling is not included in any current package.

[Dashboard](#) | [Calling is a future update](#)

02 Robots you can follow

See what each role is doing and click a robot to follow its work in the Colony.

[Dashboard](#)

03 Counts on every district

See contacts, bookings and needs-attention counts from connected services.

[Connected feeds](#)

04 Lite mode and camera controls

Use Lite mode on slower computers, plus Reset, Top, Orbit and Labels view controls.

[Dashboard](#)

05 Readable building labels

Show building names and reveal more detail as you zoom into the Colony.

[Dashboard](#)

Keep in mind

Calling is a future update, not a feature included in Guard, Closer or Platinum. The reserved district does not activate a calling service.

CAPABILITIES 06-09

Business insights

Know what happened today and where a person needs to step in. Counts depend on connected data.

06 Daily scorecard

Track leads texted, replies, interested leads, booked calls, needs-you handoffs and opted-out contacts.

[Connected feeds](#)

07 Opt-out rate watch

Watch for a rising opt-out rate so you can investigate your wording and outreach practices. It is monitoring, not a deliverability guarantee.

[Monitoring](#)

08 The “Needs you” list

Prioritize the conversations AI-assistant handed to a licensed person instead of making an automated guess.

[Human review](#)

09 Your Today panel

See upcoming appointments and the bot’s results for the day in one view.

[Connected feeds](#)

Keep in mind

An empty or unverified feed is not a performance result. Confirm each account connection during setup.

CAPABILITIES 10-15

Connection checks

Verify the essential connections, workflows and tags before activating an account.

10 PitchPrfct connection check

Check that the account connection and key are accepted before relying on the bot.

[Setup check](#)

11 Cal.com calendar health

Check calendar connectivity and the scheduling setup.

[Setup check](#)

12 Appointment-type check

Verify which configured appointment types the scheduling system can use.

[Setup check](#)

13 Lead-intake check

Confirm that approved new leads enter the intended Vanilla Leads workflow.

[Setup check](#)

14 Workflow checker

Inspect the required drips, stage tags, Spanish drips and booking-link follow-ups.

[Setup check](#)

15 Tag audit and copy warning

Review stage-tag consistency and flag leftover "(Copy)" workflows that could cause duplicate or wrong follow-ups.

[Setup check](#)

Keep in mind

Customers connect their own service accounts. This guide does not supply access to the owner's texting or calendar account.

CAPABILITIES 16-22

Your work desk

Prepare the next action, review suggested wording and organize the work around your clients.

16 Meda, your plain-English assistant

Ask how yesterday went or which stage to work first, and get suggested replies and account insights.

Plan dependent

17 Retention desk

Organize missed-payment follow-ups and prepare texts, emails and call scripts for you to review and send.

Platinum

18 Carrier emails and Book of Business

With the Outlook connection configured, organize policy approvals, active policies, missed payments and cancellations.

Platinum | Connection required

19 Low-income and no-price suggestions

Get reviewable wording for difficult income or pricing conversations without presenting an exact insurance quote.

Human review

20 Download your playbook

Export your configured tags, workflows and templates into a portable file.

Plan dependent

21 Lead collection controls

Set collection limits and pause or resume configured hourly collection. A schedule does not guarantee a successful run.

Platinum | Setup required

22 Commands to your server

Request server actions such as collecting leads or pausing texting. The server performs approved actions; the Colony does not independently send messages.

Authorized actions

Keep in mind

Reviewable suggestions do not send themselves. The Colony does not independently text a client or perform an unapproved server action.

CAPABILITIES 23-29

AI-assistant's replies

AI-assistant uses approved wording to move supported conversations toward the right next step.

23 "Yes," "interested," and "hi"

Recognize common positive replies and use the approved next-step wording.

[Closer and up](#)

24 Individual, family or business

Identify the coverage audience so the conversation follows the appropriate approved path.

[Closer and up](#)

25 Price questions without exact quotes

Use approved estimate ranges, then move interested leads toward a specialist call.

[Approved templates](#)

26 Plan and benefits questions

Handle common plan, deductible, benefits and carrier questions with approved wording, while reserving plan-specific advice for the agent.

[Approved templates](#)

27 "Send me info" or "email me"

Respond with the approved information-request path and the next step toward a call.

[Approved templates](#)

28 "I'm busy right now"

Recognize a busy lead and offer the appropriate scheduling next step.

[Approved templates](#)

29 "I already have insurance"

Use comparison wording where appropriate. A refusal or request to stop takes precedence over a sales reply.

[Guards first](#)

Keep in mind

STOP, refusals and human-handoff rules take precedence. AI-assistant does not invent quotes, eligibility decisions or insurance advice.

CAPABILITIES 30-35

AI-assistant's replies (continued)

AI-assistant uses approved wording to move supported conversations toward the right next step.

30 Collect the missing details

Gather date of birth, ZIP code and email when the approved workflow needs them.

Closer and up

31 Who, where and AI questions

Handle identity questions using approved wording or hand them to a person. AI-assistant never claims to be a licensed agent or a human.

Identity safeguards

32 Spanish replies and drips

Use Spanish templates and matching Spanish follow-ups for supported Spanish conversations.

Platinum

33 Income questions in plain words

Use approved, state-aware low-income wording and explain why income may matter without promising eligibility or subsidy amounts.

Approved templates

34 Reschedule requests

Recognize "something came up," offer available times and use the scheduling system to move the booking.

Calendar connection

35 Call requests and time choices

Handle clear day-and-time choices through scheduling, or flag an immediate or uncertain call request for you.

Scheduling or handoff

Keep in mind

STOP, refusals and human-handoff rules take precedence. AI-assistant does not invent quotes, eligibility decisions or insurance advice.

CAPABILITIES 36–38

Booking & reminders

Separate a requested time from a real appointment. Calendar and workflow configuration matter.

36 Book in the client's time zone

Create the appointment through Cal.com in the lead's time zone. Calendar invitations depend on the configured calendar and attendee details.

[Calendar connection](#)

37 Appointment reminders

Use the configured reminder workflows before the appointment.

[Calendar & workflows](#)

38 No-shows and rebooking

Use missed-appointment and rebooking paths without confusing a past call with a newly confirmed appointment.

[Configured workflows](#)

Keep in mind

A time choice is not proof of a booking. If scheduling cannot be confirmed, the conversation needs human attention rather than an invented confirmation.

CAPABILITIES 39–45

Safety guards

A safe handoff matters more than another sales reply. These rules keep sensitive decisions with a person.

39 Stop on opt-outs

STOP and recognized opt-out language suppress further automated replies and close the lead correctly.

Guards first

40 Insults, wrong numbers and off-topic texts

Stop or hand off unsupported conversations instead of continuing a sales script.

Guards first

41 Silence when a person is needed

Confused, upset or closing conversations are handed to you when the rules call for human attention.

Human handoff

42 Sensitive questions go to a person

Medicare, complaints, claims, legal concerns and emergencies are not handled with improvised insurance advice.

Human handoff

43 Names that are actually people

Use a first name only when it is recognized as a person's name, not a business name.

Identity safeguards

44 Approved estimate ranges only

Do not invent exact premiums. Plan-specific quotes and eligibility decisions stay with the licensed agent.

Pricing safeguards

45 Consistent plan count and short links

Keep the configured plan count consistent and use the approved short booking-link routes.

Template consistency

Keep in mind

These are configured safeguards, not a guarantee of legal compliance or deliverability. Agents remain responsible for consent, licenses and carrier rules.

CAPABILITIES 46-47

Drafts & lead collection

These two capabilities require explicit setup and activation. Listing them here does not mean they are live in an account.

46 AI fallback, draft-first

Gemini can prepare a suggestion when no approved template fits. Drafts are validated and saved to an authenticated review queue. Copying, reviewing or rejecting never sends a client text. Requires a configured provider and storage.

Human review | Activation required

47 FMCSA collection with rate-limit safeguards

Collect and score owner-operator records, respect Retry-After, defer long cooldowns, and exclude known CRM numbers. Mobile, DNC and litigator checks gate weekday import; incomplete CRM suppression stops collection. Weekend records follow the configured sheet-only path.

Platinum | Setup required

Keep in mind

Public records do not establish consent to marketing texts. AI drafts need human review; lead collection needs validated connections, screening and suppression checks.

Choose your next step

[Book a 20-minute demo](#) or [compare the current plans](#). Confirm the features and required connections for your account before activation.