MAYAN BOTANICALS

Ultimate Herbal Wellness

7-Agent Dashboard Training Manual

Website-Branded Edition

For All Team Members — Support, Sales, Operations & Leadership

dashboard.mayanbotanicals.com

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Table of Contents

Tip: in Microsoft Word, right-click the table and choose "Update Field" to refresh page numbers.

Quick Chapter Index

Chapter 1: Welcome & Overview

What Is the Mayan Botanicals Dashboard?

The Mayan Botanicals 7-Agent Dashboard is the operational nerve center of your practice. It is a secure, web-based platform located at dashboard.mayanbotanicals.com that brings together seven intelligent automation agents — each designed to handle a specific area of your client and business workflow.

Think of each agent as a highly trained assistant who never sleeps. Each agent can receive information, process it using established Mayan Botanicals protocols, and produce a clear, actionable report. Your job is to review those reports and take the recommended next steps.

Who Should Use This Dashboard?

Team Role	Primary Dashboard Use
Support Staff	Run the Client Onboarding and Compliance Agents; manage portal access and client communications
Sales / Concierge	Run the Maya Lead Intelligence and GHL Campaign Automation Agents; convert leads to booked consultations
Operations	Run the Meal Planning, Coach Prince Follow-Up, and Protocol Agents; manage fulfillment and client progress
Leadership / QA	Review all agent outputs; monitor KPIs; use the Compliance Agent for quality assurance
DocTA Dwight	Full access to all agents; final sign-off on protocol outputs and escalations

What Outcomes Does the Dashboard Support?

- Converting Maya AI phone leads into booked consultations and paid clients
- Generating personalized Sweet Blood Protocols for each new client
- Onboarding clients into the Mayan Client Portal (MBCP) quickly and correctly
- Delivering therapeutic meal plans through the DocTA Dwight Protocol Builder (DDPB)
- Keeping GHL marketing campaigns running on schedule
- Ensuring Coach Prince follow-up calls happen on time, every time
- Maintaining brand compliance and client safety across all communications

> 📋 **MANAGER NOTE**
> The dashboard does not replace your team's judgment — it amplifies it. Agents surface information and generate recommendations. A trained team member must always review the output and decide on next steps.

Core Principles of the Dashboard

- Education First — All outputs are framed as educational wellness support, never as medical diagnosis or treatment.
- Safety by Design — Every agent has built-in escalation rules for messages that involve health crises or vulnerable clients.
- One Source of Truth — All client data flows through GHL and MBCP. The agents read from and write to these systems so nothing falls through the cracks.
- Auditability — Every agent run is time-stamped and logged so managers can review activity and coach the team.

Chapter 2: Quick-Start Guide (10 Minutes)

New to the dashboard? Follow these steps to run your first agent in under 10 minutes.

Step 1 — Log In (1 minute)

STEP-BY-STEP

1. Open your web browser and go to: dashboard.mayanbotanicals.com
2. Enter your team email address and password. Click Log In.
3. If you do not have a login, contact your manager immediately — do not share credentials.
4. You will land on the Home Dashboard showing the seven agent cards.

Step 2 — Understand the Home Screen (2 minutes)

The home screen shows seven colored cards arranged in a grid. Each card represents one agent. At a glance you can see:

- Agent name and icon
- Last run time and date
- Status indicator: Green = Ready | Yellow = Running | Red = Needs Attention
- A "Run Agent" button

💡 **PRO TIP**

Always check the "Last Run" timestamp before clicking Run Agent. If the agent ran less than 30 minutes ago, the previous report may still be current.

Step 3 — Run Your First Agent (3 minutes)

STEP-BY-STEP

1. Click on the Agent 1 card: Maya Lead Intelligence Agent.
2. The agent detail page opens. Review the Input Data Required section on screen.
3. In most cases, the agent pulls data automatically from Maya AI and GHL. If a date range selector appears, choose Today.
4. Click the green "Run Agent" button.
5. A progress bar appears. Wait — do not click anywhere else during processing.
6. When complete, the status indicator turns Green and a Report button appears.

Step 4 — Read the Output (2 minutes)

STEP-BY-STEP

1. Click View Report.
2. The report opens in a readable panel on the right side of the screen.
3. Read the Summary section at the top — this gives you the key result in plain English.
4. Scroll down to the Recommended Actions section — this tells you what to do next.
5. Look for any items flagged in red — these are priority escalations.

Step 5 — Take Action and Log It (2 minutes)

STEP-BY-STEP

1. Complete the first recommended action from the report.
2. Click the "Mark as Reviewed" button on the report.
3. Add a brief note in the Notes field explaining what action you took.
4. Click Save. The report is now logged with your name and timestamp.

⚠ WARNING

Never close a report without clicking "Mark as Reviewed." Unreviewed reports are automatically flagged for manager review after 4 hours.

You Are Ready

That's it. You have successfully run your first agent. Each of the seven agents follows this same pattern: open, configure if needed, run, read the report, take action, log your notes. The sections below explain each agent in full detail.

Chapter 3: Dashboard Navigation

The Navigation Bar

The top navigation bar is always visible. It contains the following areas:

Nav Item	What It Does
Home	Returns you to the seven agent cards from anywhere in the dashboard
Reports	Shows a full history of all agent runs, filterable by agent, date, and team member
Clients	Quick link to the Mayan Client Portal (MBCP) client list
GHL	Quick link to the GoHighLevel CRM contact and pipeline view
Settings	API health status, notification preferences, and user account management (managers only)
Help	Links to this training manual, video walkthroughs, and the support contact

Status Indicators

Status indicators appear on each agent card and at the top of each report. Here is what they mean:

Color / Icon	Meaning
Green Circle	Agent ran successfully. Report is ready and reviewed.
Yellow Circle	Agent is currently running. Do not interrupt.
Blue Circle	Report is ready but has not yet been reviewed by any team member.
Red Circle	Agent encountered an error, or the report contains an escalation flag.
Gray Circle	Agent has not been run today. Check your Daily SOP.

The Reports History Panel

Click Reports in the nav bar to see a table of every agent run. You can filter by:

- Agent name
- Date range (Today, This Week, This Month, Custom)
- Team member who ran the agent
- Review status (Reviewed / Unreviewed / Escalated)

📋 **MANAGER NOTE**

Check the Reports panel every morning to verify all required agents were run the day before and that all reports have been marked as reviewed. Unreviewed reports older than 24 hours should be addressed in the daily team huddle.

API Health Panel

Under Settings > API Health you will find a status board showing the live connection status of all integrations:

- Maya RetellAI — Voice agent call data feed
- GoHighLevel (GHL) — CRM, pipeline, and campaign data
- Mayan Client Portal (MBCP) — Client database and file delivery
- DocTA Dwight Protocol Builder (DDPB) — Meal plan and protocol engine
- WooCommerce — Product order and payment data

If any integration shows a Red status, refer to the Troubleshooting section of this manual immediately.

Chapter 4: Agent Mascot Gallery

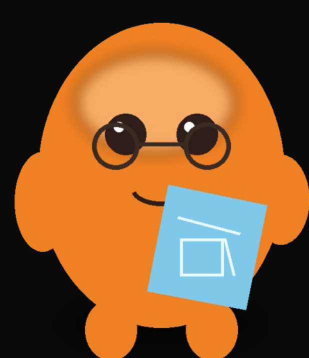
These seven unique mascot cards provide a visual quick-reference for every automation role in the Mayan Botanicals ecosystem. Maya is represented as a female mascot, and each of the seven agents has its own distinct character design. Use this chapter for onboarding, team huddles, and role clarity.

Agent 1: Maya Lead Intelligence

Maya Scout (Female Mascot)

Lead qualification and routing intelligence

Agent 2: Sweet Blood Protocol



Protocol Architect Mascot

Protocol generation and interaction safety checks

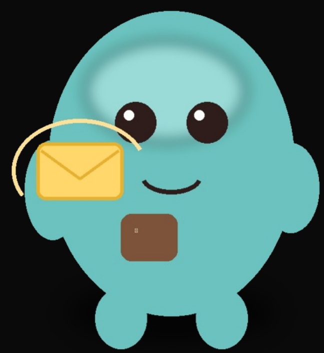
Agent 3: Client Onboarding

Onboarding Broadcaster Mascot
Portal setup, welcome delivery, and onboarding flow

Agent 4: Meal Planning

Meal Planner Closer Mascot
Therapeutic nutrition planning and weekly meal refresh

Agent 5: GHL Campaign Automation



Campaign Courier Mascot
CRM workflow orchestration and campaign optimization

Agent 6: Coach Prince Follow-Up

Coach Momentum Mascot
Client accountability follow-up and momentum coaching

Agent 7: Compliance & QA Monitor

Compliance Guardian Mascot
Brand safety, compliance, and quality assurance monitoring

Chapter 5: The 7 Agents — Detailed Reference

Each agent is documented in detail below. Every agent section follows the same format so you can find information quickly regardless of which agent you are working with.

AGENT 1

Maya Lead Intelligence Agent

Qualifies incoming leads from Maya AI calls and routes them to the right next step

Primary Purpose

The Maya Lead Intelligence Agent reads the data generated by every inbound call handled by Maya — your AI voice agent on (470) 594-5609. It scores each caller's interest level and health context, then routes the lead to the correct next step in your funnel: booking a consultation, receiving a nurture email sequence, or receiving a follow-up text from Coach Prince.

Who Runs This Agent

Sales/Concierge staff — run once in the morning and once in the afternoon every business day.

Input Data Required

Input	Source

Maya AI call transcripts and recordings	RetellAI — automatic, no manual upload needed
Date range (default: since last agent run)	Selected by team member in the date picker
Lead scoring threshold	Pre-set by management — do not change without approval

What Happens When You Click "Run Agent"

The agent performs the following steps automatically:

1. Pulls all new call records from Maya AI since the last run.
2. Reads each call transcript and scores the lead on a 1–10 scale based on: urgency of health concern, expressed interest in a consult, financial readiness signals, and 14-state conversation flow completion.
3. Checks GHL to confirm whether each caller is already a contact. Duplicates are flagged, not double-entered.
4. Generates a routing recommendation for each lead: Book Now, Nurture, Coach Prince Call, or Archive.
5. Produces a Lead Intelligence Report listing all leads processed in this run.

How to Read the Output / Report

The Lead Intelligence Report has four sections:

- Summary Bar — Total leads processed, breakdown by routing recommendation, and any flags.
- Lead Table — Each row is one caller. Columns: Name/Phone, Call Date, Score (1–10), Routing Recommendation, Current GHL Status, Notes from Maya.
- High-Priority Leads — Any lead scored 7 or above is pulled into this highlighted section. These require action within 2 hours.
- Flags — Any lead where Maya detected a health crisis signal (e.g., the caller mentioned a recent hospitalization, extremely high blood sugar reading above 400 mg/dL, or suicidal ideation) is flagged in red and must be escalated immediately.

> 💡 **PRO TIP**
> Sort the Lead Table by Score (highest first) to work your hottest leads immediately. A score of 8 or higher means the caller explicitly asked about working with DocTA Dwight or the Sweet Blood Protocol.

What Actions to Take Next

Score Range	Recommended Action
8 – 10 (Hot)	Call the lead within 30 minutes. Offer to book a complimentary consultation directly. Log the outcome in GHL.
5 – 7 (Warm)	Add the lead to the "Warm Nurture" GHL sequence. Set a follow-up task for Coach Prince in 48 hours.

1 – 4 (Cool)	Add to the "Educational Drip" GHL sequence. No immediate call needed.
Flag: Crisis	Do NOT call. Escalate immediately to DocTA Dwight. See Escalation Rules below.
Duplicate	Update the existing GHL contact record with new call notes. Do not create a new record.

Escalation and Safety Rules

🚨 **IMPORTANT**

If a caller's transcript contains ANY of the following phrases or signals, do not contact them through a sales workflow. Escalate to DocTA Dwight immediately and log the escalation in the Compliance Log: (1) Blood sugar above 400 mg/dL, (2) Any mention of insulin shock or diabetic coma, (3) Any mention of self-harm or hopelessness, (4) Caller sounds confused, disoriented, or in acute distress.

To escalate: click the red flag icon on the lead row, select "Escalate to DocTA," add a brief note, and click Submit. DocTA Dwight will receive a notification and will review the case personally within one hour during business hours.

Common Mistakes to Avoid

- Do not call a flagged lead before DocTA Dwight has reviewed and cleared the escalation.
- Do not manually enter a lead score. The agent calculates scores automatically — manual overrides require manager approval.
- Do not run this agent more than twice per day without a manager's instruction. Running it too frequently can create duplicate GHL contacts.
- Do not archive a lead with a score above 4 without documenting the reason.

💡 **PRO TIP**

Example scenario: Maya handled 12 calls yesterday. The agent report shows 3 hot leads (scored 8+), 5 warm leads, 3 cool leads, and 1 flagged lead. You call the 3 hot leads first, add the 5 warm leads to the GHL nurture sequence, let the cool leads enter the drip, and escalate the flagged lead to DocTA Dwight before doing anything else.

AGENT 2

Sweet Blood Protocol Agent

Generates personalized A1C reduction and metabolic health protocols for enrolled clients

Primary Purpose

The Sweet Blood Protocol Agent is the clinical core of the Mayan Botanicals practice. It takes a new or existing client's intake data — including A1C readings, current medications, lifestyle information, and wellness goals — and generates a personalized protocol outline based on DocTA Dwight's 4-Month A1C Protocol framework. All outputs are educational wellness guidance, not medical prescriptions.

Who Runs This Agent

Operations staff — run for each new client after intake is complete, and again at the 30-day, 60-day, and 90-day check-in milestones.

Input Data Required

Input	Source
Client intake form (completed)	Submitted through the MBCP intake form or by Operations manually
Initial A1C reading	Entered manually from the client's most recent lab report
Current medications and supplements	Entered manually from intake form — must be verified by Operations
Health goals (in the client's own words)	From intake form free-text field
Dietary preferences and restrictions	From intake form

⚠ **WARNING**

This agent requires a completed intake form before it will run. If the intake is incomplete, the agent will display an orange warning and list the missing fields. Do not run the protocol on incomplete intake data.

What Happens When You Click "Run Agent"

6. The agent reads the client's intake data from MBCP.
7. It maps the client's A1C level to the appropriate program phase (Phase 1: Foundation, Phase 2: Activation, Phase 3: Transformation, Phase 4: Maintenance).
8. It generates a 4-Month Protocol Outline covering: herbal supplement recommendations, dietary guidelines, lifestyle modifications, and weekly milestone targets.
9. It cross-references the client's current medications against the Mayan Botanicals herb-drug interaction reference list and flags any potential interactions for DocTA Dwight's review.

10. It produces the Sweet Blood Protocol Report and a client-facing Protocol Summary PDF ready for delivery through MBCP.

How to Read the Output / Report

The Sweet Blood Protocol Report contains four sections:

- Client Profile Summary — Name, A1C level, program phase, key intake highlights.
- Protocol Outline — A month-by-month plan with weekly milestones. Each recommendation is linked to an educational note explaining the reason behind the recommendation.
- Interaction Flags — Any herb-medication interactions identified are listed here in orange. These must be reviewed by DocTA Dwight before the protocol is delivered to the client.
- Client PDF Ready — A green checkmark indicates the client-facing summary PDF has been generated and is ready to upload to the client's MBCP portal.

📋 **MANAGER NOTE**

No protocol is delivered to a client until DocTA Dwight has signed off on any Interaction Flags. If the Interaction Flags section is empty, Operations may proceed with client delivery after a standard 24-hour review window.

What Actions to Take Next

11. Review the Interaction Flags section. If flags exist, send the report to DocTA Dwight for review before doing anything else.
12. If no flags or after DocTA clearance: upload the client-facing Protocol Summary PDF to the client's MBCP portal file library.
13. Send the client an automated "Your Protocol Is Ready" notification via GHL.
14. Schedule the 30-day check-in appointment in GHL calendar.
15. Log the protocol version and run date in the client's GHL contact record.

Escalation and Safety Rules

🚨 **IMPORTANT**

If a client's A1C is above 11.0%, the agent will automatically display a red banner stating: "High A1C Alert — DocTA Dwight review required before protocol delivery." Do not deliver any protocol to this client until DocTA Dwight has personally reviewed the case.

- Never advise a client to stop any prescribed medication based on this protocol output. Protocol language uses phrases such as "support," "nourish," "complement," and "work alongside your healthcare provider."
- If a client contacts you saying they have stopped a prescribed medication to follow the protocol, escalate to DocTA Dwight immediately and log the incident.

Common Mistakes to Avoid

- Running the agent with placeholder or estimated A1C values. Always use the client's actual, recent lab value.

- Uploading the internal Protocol Report (with Interaction Flags) to the client portal instead of the client-facing Protocol Summary PDF. The internal report is for staff eyes only.
- Skipping the 30-day re-run. The protocol must be updated at each check-in milestone to reflect the client's progress.

AGENT 3

Client Onboarding Agent

Sets up new clients in the Mayan Client Portal and delivers their welcome package

Primary Purpose

The Client Onboarding Agent automates the administrative steps required to welcome a new paying client into the Mayan Botanicals ecosystem. It creates the client's MBCP portal account, sends their login credentials, uploads their initial file bundle, and triggers the GHL welcome sequence. This process used to take 45 minutes manually — the agent completes it in under 3 minutes.

Who Runs This Agent

Support staff — run for every new client within 2 hours of confirmed payment.

Input Data Required

Input	Source
Client full name	From GHL contact record (verified at payment)
Client email address	From GHL contact record
Program purchased	From WooCommerce order confirmation or GHL opportunity stage
Payment confirmed (checkbox)	Manually checked by Support before running — do not skip
Assigned protocol phase	From the Agent 2 output, or "Pending" if Agent 2 not yet run

What Happens When You Click "Run Agent"

16. The agent verifies the client does not already have an MBCP portal account (prevents duplicates).
17. It creates the client's MBCP account with a secure temporary password.
18. It uploads the standard Welcome File Bundle to the client's portal file library: Welcome Letter (personalized), Program Overview PDF, MBCP How-To Guide, and the Mayan Botanicals Herb Reference Sheet.
19. It sends the client an email with their login credentials and a direct link to their portal.
20. It triggers the "New Client Welcome Sequence" in GHL (a 5-email + 2-SMS series over 14 days).
21. It updates the client's GHL contact record to "Active Client" stage and logs the onboarding date.

How to Read the Output / Report

The Onboarding Report is a short confirmation checklist:

- Portal Account Created — Green check or red X with error message
- Files Uploaded — Green check with list of files, or red X if any file failed
- Welcome Email Sent — Green check with sent timestamp, or red X with error
- GHL Sequence Triggered — Green check with sequence name, or red X

- GHL Contact Updated — Green check, or red X

A fully successful onboarding will show five green checks. Any red X requires immediate action.

What Actions to Take Next

22. Review the report for any red X items. Resolve any errors before moving on.
23. Send a personal welcome text message to the client from the GHL conversations inbox. Keep it warm and brief: congratulate them on taking the step, let them know their portal login is in their inbox, and tell them their next step is to log in and review their Welcome Letter.
24. Create a reminder task in GHL to follow up with the client in 48 hours to confirm they accessed their portal.

> 💡 **PRO TIP**
> If the client's portal email bounces (you'll see a red X on "Welcome Email Sent"), check the email address in GHL for typos. Correct it in GHL, then re-run the agent. Do not resend credentials manually — always re-run the agent to ensure the system record stays accurate.

Escalation and Safety Rules

- Never run the Onboarding Agent for a client whose payment is not confirmed. If payment status is unclear, check with the Sales/Concierge team or review the WooCommerce order before proceeding.
- If a client's intake form mentions a life-threatening health condition (e.g., recent hospitalization, organ failure, current cancer treatment), notify DocTA Dwight before completing onboarding. DocTA Dwight will determine whether the client should be enrolled or referred elsewhere.

Common Mistakes to Avoid

- Running onboarding for a client who already has an active portal account. The agent will catch this and display a warning, but always double-check GHL first.
- Not sending the personal welcome text. The automated email is professional; the personal text is what makes clients feel valued.
- Forgetting to create the 48-hour follow-up task. Portal access issues are most common in the first 48 hours.

AGENT 4

Meal Planning Agent

Creates personalized therapeutic meal plans through the DocTA Dwight Protocol Builder

Primary Purpose

The Meal Planning Agent connects to the DocTA Dwight Protocol Builder (DDPB) and generates a customized weekly meal plan for each active client based on their dietary preferences, therapeutic targets, cultural food traditions, and program phase. Meal plans are pulled from curated datasets including USDA, West African, Nigerian, Indian, South Asian, and Global Healthy food libraries — all tagged with therapeutic properties relevant to metabolic health.

Who Runs This Agent

Operations staff — run weekly for all active clients, or on demand when a client requests a plan update.

Input Data Required

Input	Source
Client name (select from dropdown)	Active client list from MBCP
Program phase (auto-populated)	From client's protocol record in MBCP
Dietary restrictions and preferences	From client intake form — automatically loaded
Cultural food preference	Dropdown: Standard American, West African, Nigerian, South Asian, Indian, Global
Week number in program (auto-populated)	Calculated from onboarding date
Calorie target (optional)	Leave blank to use program default

What Happens When You Click "Run Agent"

25. The agent reads the client's dietary profile from MBCP.
26. It selects appropriate meals from the relevant cultural dataset that match the client's restrictions, therapeutic targets (e.g., low glycemic index, anti-inflammatory), and program phase.
27. It assembles a 7-day meal plan with breakfast, lunch, dinner, and one optional snack for each day.
28. It calculates approximate macronutrient totals and flags any days where the plan falls outside the program's target ranges.
29. It generates a print-friendly Meal Plan PDF and uploads it to the client's MBCP portal file library.
30. It sends the client a GHL notification that their new meal plan is ready.

How to Read the Output / Report

- Meal Plan Summary — 7-day grid showing each meal slot. Color-coded: green = on target, yellow = slightly outside range (acceptable), orange = significantly outside range (review recommended).
- Nutritional Summary — Average daily calories, carbohydrates, protein, and fat compared to program targets.
- Therapeutic Tag Summary — Lists which health-supportive properties are covered in this week's plan (e.g., blood sugar regulation, anti-inflammation, gut health, kidney support).
- Client PDF Status — Confirmation that the PDF is ready in the client's portal.

> 💡 **PRO TIP**
> If a client tells you they do not like one of the meals in their plan, use the Regenerate button on any individual meal slot to get a replacement from the same cultural dataset and therapeutic category. You do not need to re-run the entire agent.

What Actions to Take Next

31. Review the Nutritional Summary for any orange flags. If any day's carbohydrate total exceeds 150g on a Phase 1 client, consult the program guidelines and consider using the Regenerate feature on high-carb meal slots.
32. Verify the client PDF was successfully uploaded by checking the "Client PDF Status" item.
33. Send a personal note in GHL letting the client know their plan is ready and encouraging them to try the featured meal of the week.

Escalation and Safety Rules

- If a client reports an allergic reaction to a food in their meal plan, escalate to DocTA Dwight immediately. Log the incident in GHL under the client record with the label "Adverse Food Event."
- Never suggest a client substitute a prescribed therapeutic herb with a meal item, or vice versa. Herbs and meal plans serve complementary but distinct roles.

Common Mistakes to Avoid

- Selecting the wrong cultural food preference for a client. Double-check the intake form before running. An incorrect cultural dataset produces a meal plan the client is unlikely to follow.
- Ignoring orange-flagged nutritional days. These do not cause errors, so they are easy to overlook — but they matter for client outcomes.
- Sending the same meal plan for two consecutive weeks without regenerating. The agent will re-run with variety built in if you click Run Agent each week.

AGENT 5

GHL Campaign Automation Agent

Manages and optimizes GoHighLevel marketing campaigns, workflows, and contact pipeline

Primary Purpose

The GHL Campaign Automation Agent is your marketing operations manager. It monitors the health of all active GoHighLevel campaigns, checks that contacts are moving through the funnel correctly, flags any campaign sequences that have stalled, and prepares a Campaign Health Report every day. It can also trigger campaign actions on demand — such as adding a batch of contacts to a new sequence or pausing a campaign.

Who Runs This Agent

Sales/Concierge staff run the daily Campaign Health check each morning. Operations staff may run it on demand when making campaign changes.

Input Data Required

Input	Source
Report type (default: Daily Health Check)	Dropdown selection by team member
Date range (default: Yesterday)	Date picker — auto-set to yesterday for the morning run
Campaign filter (optional)	Dropdown to focus on one campaign if needed

What Happens When You Click "Run Agent"

34. The agent connects to GHL and reads the status of all active campaigns and workflows.
35. It checks delivery rates for emails and SMS messages sent in the selected date range.
36. It identifies any contacts who are "stuck" — meaning they entered a workflow step but have not progressed in over 48 hours.
37. It checks the pipeline for any opportunities that have been in the same stage for over 7 days (stale pipeline alert).
38. It reviews open and click rates for the last email broadcast and flags below-benchmark performance.
39. It produces the Campaign Health Report.

How to Read the Output / Report

- Campaign Scoreboard — A table listing every active campaign with: contacts enrolled, message delivery rate, open rate, click rate, and a health score (A/B/C/D).
- Stuck Contacts — A list of contacts who are stalled in a workflow. Each row shows the contact name, which step they're stuck on, and how long they've been stuck.

- Stale Pipeline Alerts — Opportunities sitting too long in one stage, with the opportunity name, current stage, and days since last update.
- Benchmark Comparison — How your campaign metrics compare to target benchmarks. Email open rate target: 28%+. SMS response rate target: 15%+.

> 📋 **MANAGER NOTE**
> Review the Campaign Scoreboard weekly and share the A/B/C/D ratings in your team meeting. Campaigns rated C or D for two consecutive weeks should be reviewed and updated.

What Actions to Take Next

40. Address all Stuck Contacts today. For each stuck contact: open their GHL record, determine why they stalled (bounced email, no phone number, etc.), correct the issue, and manually advance them to the next workflow step.
41. Contact the Sales/Concierge team about any Stale Pipeline Alerts so they can follow up with those opportunities.
42. For any campaign rated C or D, flag it for a content review meeting with DocTA Dwight.

Escalation and Safety Rules

- Never delete a contact from GHL based on campaign data without manager approval. Unsubscribes are handled automatically by GHL.
- If the agent detects that an email campaign sent messages containing non-compliant language (flagged by the Compliance Agent in cross-check mode), pause the campaign immediately and escalate to DocTA Dwight.

Common Mistakes to Avoid

- Ignoring stuck contacts. Stuck contacts are leads or clients who are not receiving follow-up — every stuck contact is a missed opportunity or a client falling through the cracks.
- Running the Campaign Automation Agent without first checking the API Health panel. If GHL is showing a connection error, the report will be incomplete.
- Manually editing campaign settings in GHL and then running this agent without logging the changes. Always note any manual GHL changes in the daily report notes field.

AGENT 6

Coach Prince Follow-Up Agent

Manages all post-consultation follow-up tasks, client check-ins, and progress tracking

Primary Purpose

Coach Prince is the follow-up and accountability arm of the Mayan Botanicals client journey. The Coach Prince Follow-Up Agent manages his entire schedule — generating daily call lists, logging call outcomes, tracking client milestone progress, and identifying clients who need extra encouragement or who may be at risk of dropping out of the program. It is the bridge between the clinical protocol and long-term client success.

Who Runs This Agent

Operations staff — run every morning to generate Coach Prince's daily call list. Run again in the afternoon to log outcomes from calls completed.

Input Data Required

Input	Source
Run mode (Morning: Generate Call List / Afternoon: Log Outcomes)	Toggle selection
Date (default: Today)	Auto-set to today
Call outcome data (Afternoon run only)	Entered manually by Coach Prince after each call

What Happens When You Click "Run Agent" — Morning Mode

43. The agent scans all active client records in GHL and MBCP.
44. It identifies clients due for a check-in based on: days since last contact, program milestone schedule, and any special flags (e.g., client expressed concern in portal message).
45. It prioritizes the list: clients with no contact in over 7 days are Priority 1; milestone check-ins are Priority 2; routine encouragement calls are Priority 3.
46. It generates Coach Prince's Daily Call Sheet — a prioritized list with client name, phone, last contact date, program week, and a personalized conversation prompt for each call.

What Happens When You Click "Run Agent" — Afternoon Mode

47. The agent reads the call outcomes entered by Coach Prince.
48. It updates each client's GHL record with the call notes and outcome status.
49. It flags any client whose call outcome indicates a concern (e.g., client is discouraged, missed protocol steps, or reported a symptom).
50. It schedules the next follow-up for each client.

How to Read the Output / Report

- Morning Report — Call Sheet: Numbered list of calls to make today, sorted by priority. Each entry shows the personalized conversation prompt. Print this or keep it open on screen during calls.
- Afternoon Report — Outcome Summary: Table showing completed calls, key themes from today's calls, any escalation flags, and clients rescheduled for tomorrow.
- At-Risk Dashboard (visible in both reports): Clients with 3 or more missed check-ins, or who have not logged into their portal in over 14 days.

> 💡 **PRO TIP**
> The personalized conversation prompt is generated from the client's intake notes and last protocol update. Coach Prince should read it before each call but speak naturally — it's a guide, not a script.

What Actions to Take Next

51. After the morning run: Coach Prince reviews the call sheet and makes all Priority 1 calls before noon. Priority 2 and 3 calls are completed by end of day.
52. After each call: Coach Prince enters the outcome in the Call Outcome Form in the dashboard (3 fields: Brief Notes, Outcome Category, Next Step). This takes under 60 seconds per call.
53. After the afternoon run: Operations reviews escalation flags with DocTA Dwight during the end-of-day check-in.

Escalation and Safety Rules

> 🚨 **IMPORTANT**
> If a client tells Coach Prince anything that suggests a medical emergency, immediate health crisis, or any statement about self-harm or hopelessness: Coach Prince ends the call professionally, escalates immediately using the red flag button in the call sheet, and notifies DocTA Dwight by phone (not just through the dashboard).

- Coach Prince does not provide any medical advice, adjust supplement dosages, or change protocol elements. If a client asks protocol-specific questions, the answer is: "That's a great question for DocTA Dwight — I'll flag that in your notes and DocTA will follow up with you."

Common Mistakes to Avoid

- Skipping the afternoon run. Without the afternoon outcome logging, the next morning's call sheet will be inaccurate.
- Entering vague call outcome notes like "called, no answer." Use the Outcome Category dropdown (Reached / Voicemail / No Answer / Rescheduled) and add a brief note even for voicemails.
- Not addressing the At-Risk Dashboard. Clients who have gone quiet for 14+ days need proactive outreach — they are most at risk of dropping out.

AGENT 7

Compliance & QA Monitor Agent

Reviews all outgoing communications and content for brand compliance and regulatory safety

Primary Purpose

The Compliance & QA Monitor Agent is the quality assurance layer for the entire Mayan Botanicals operation. It scans outgoing GHL emails and SMS messages, MBCP portal content, and any new blog posts or social media content for compliance with Mayan Botanicals brand guardrails, FTC guidelines for wellness claims, and internal safety rules. It also maintains a running Quality Score for each team member's client communications.

Who Runs This Agent

Leadership/QA and DocTA Dwight run the full compliance scan weekly (every Monday morning). Operations may run it on demand before any major campaign launch.

Input Data Required

Input	Source
Scan scope (Weekly / Campaign / Specific Date Range)	Dropdown
Content types to scan (select all that apply)	Checkboxes: Email, SMS, Portal Content, Blog Posts, Social
Team member filter (optional)	Filter results by individual team member

What Happens When You Click "Run Agent"

54. The agent pulls all outgoing communications and content from the selected scope.
55. It scans each piece of content against the Compliance Rule Set (see Chapter 9 of this manual).
56. It flags any content containing prohibited language (e.g., "cure," "treat," "diagnose," "reversal guaranteed"), personal health claims about specific named conditions, and specific dosage instructions without a DocTA review note.
57. It scores each team member's communications on a Quality Scale of 1–100.
58. It generates the Compliance & QA Report.

How to Read the Output / Report

- Overall Compliance Score — Practice-wide score for the period. Target: 95 or above. Below 85 requires an immediate team review.
- Flagged Content Table — Each flagged item shows: content type, date sent, team member who sent it, the flagged phrase, the rule it violates, and a suggested compliant alternative.
- Team Member Scoreboard — Individual scores for each team member. This is used for coaching, not for punitive action.

- Trend Line — Score over the past 8 weeks so leadership can see whether compliance is improving or declining.

📋 **MANAGER NOTE**
Use the Team Member Scoreboard to identify coaching opportunities, not to discipline staff. A low score usually means a team member needs more support and clearer examples. Schedule a 15-minute one-on-one review for anyone scoring below 80.

What Actions to Take Next

59. Review all flagged content in this report within 24 hours of the run.
60. For each flagged item: determine whether the content has already been sent (log it and note corrective action) or is scheduled (correct it before it goes out).
61. If a flagged item represents a significant violation (e.g., an explicit medical claim was sent to hundreds of contacts), escalate to DocTA Dwight and consult your legal guidance before taking further action.
62. Use flagged phrases in the next team training session as real-world examples of what to avoid and what to say instead.

Escalation and Safety Rules

🚨 **IMPORTANT**
If the agent flags any content that includes: explicit medical diagnoses, claims that supplements will "cure" or "reverse" a named disease, or financial guarantees tied to health outcomes — this is a critical compliance breach. DocTA Dwight must review the content and all relevant GHL sends must be paused immediately pending legal review.

Common Mistakes to Avoid

- Running this agent only when something feels wrong. Weekly runs are required regardless of whether issues are suspected.
- Deleting flagged content without logging it. All compliance flags must remain in the log for audit purposes, even after the issue is corrected.
- Confusing "flagged" with "illegal." Many flags are for borderline language that simply needs rewording. The agent is conservative by design.

Chapter 6: Role-Based Workflows

Each role in the practice has a distinct set of dashboard responsibilities. Use this section to understand your daily workflow as it relates to the seven agents.

Support Staff Workflow

Primary agents: Agent 3 (Client Onboarding) and Agent 7 (Compliance QA)

Time	Action
8:00 AM	Log into dashboard. Check Home screen for any red status indicators.
8:15 AM	Review any new paid clients from overnight WooCommerce orders. Run Agent 3 for each new client.
9:00 AM	Follow up with new clients by personal text message (see Agent 3 workflow).
10:00 AM	Process any portal support requests from the MBCP inbox.
2:00 PM	Check for any 48-hour new client follow-up tasks due today. Complete them.
4:30 PM	Review the Unreviewed Reports list. Mark any completed items.

Sales / Concierge Workflow

Primary agents: Agent 1 (Maya Lead Intelligence) and Agent 5 (GHL Campaign Automation)

Time	Action
8:00 AM	Run Agent 1 for overnight Maya AI calls. Review hot leads (score 7+) immediately.
8:30 AM	Call hot leads within the 30-minute window. Log outcomes in GHL.
9:30 AM	Run Agent 5 daily campaign health check. Address stuck contacts.
11:00 AM	Follow up on warm leads from Agent 1 (add to nurture sequence).
1:00 PM	Run Agent 1 again for midday Maya calls.
3:00 PM	Address any stale pipeline alerts from Agent 5.
4:00 PM	Log all call outcomes and opportunity updates in GHL before end of day.

Operations Workflow

Primary agents: Agent 2 (Sweet Blood Protocol), Agent 4 (Meal Planning), Agent 6 (Coach Prince Follow-Up)

Time	Action
8:00 AM	Run Agent 6 (morning mode) to generate Coach Prince's call sheet.
8:30 AM	Review new clients needing Agent 2 protocol run (check GHL for newly

	onboarded clients).
9:00 AM	Run Agent 2 for any new clients whose intake is complete and verified.
10:00 AM	Run Agent 4 for any clients due for a weekly meal plan update.
12:00 PM	Check the Coach Prince At-Risk Dashboard. Follow up with any severely overdue clients.
4:00 PM	Run Agent 6 (afternoon mode). Review Coach Prince call outcomes. Escalate flags.
4:30 PM	Submit any interaction flags from Agent 2 to DocTA Dwight for review.

Leadership / QA Workflow

Primary agents: Agent 7 (Compliance QA) — plus oversight of all agents

Time / Frequency	Action
Every Monday AM	Run Agent 7 (weekly compliance scan). Review the full report.
Daily (5 minutes)	Review the Reports History panel for unreviewed reports older than 12 hours.
Daily	Review the Agent 1 escalation log for any flagged leads from the previous 24 hours.
Weekly	Review Team Member Scoreboard from Agent 7. Schedule coaching conversations as needed.
Weekly	Review Agent 5 campaign scoreboard. Approve or recommend changes to campaigns rated C or D.
Monthly	Full audit of all agent run logs for the previous month. Present results to DocTA Dwight.

Chapter 7: Daily Use SOP

The Standard Operating Procedure (SOP) below applies to the practice as a whole. Print this section and keep it at your workstation until the workflow becomes second nature.

Start of Day Checklist

Complete these steps every business day morning, in order, before engaging with clients:

- ☐ Log into dashboard.mayanbotanicals.com. Confirm you see the Home screen with all 7 agent cards.
- ☐ Check the API Health panel (Settings > API Health). All integrations must show Green. If any show Red, go to the Troubleshooting section immediately and notify your manager.
- ☐ Review the Reports History panel. Look for any reports from yesterday marked as Unreviewed. Flag them in the team Slack / GHL internal channel for immediate attention.
- ☐ Sales/Concierge: Run Agent 1 (Maya Lead Intelligence) for overnight calls.
- ☐ Operations: Run Agent 6 morning mode (Coach Prince Call Sheet).
- ☐ Support: Check MBCP inbox for new portal support requests.
- ☐ Review any red-flagged escalations from the previous day that are still open. Confirm with the relevant team member that each has been addressed.

> 💡 **PRO TIP**
> The full Start of Day checklist should take no more than 20 minutes. If it regularly takes longer, speak with your manager — a process bottleneck may need to be resolved.

Midday Checks

Complete these checks between 12:00 PM and 1:00 PM each day:

- ☐ Sales/Concierge: Run Agent 1 again for any calls processed since the morning run.
- ☐ Operations: Review Agent 4 (Meal Planning) for any clients whose plan is due this week. Run the agent for any pending clients.
- ☐ Check Coach Prince's call progress. Confirm all Priority 1 calls from the morning call sheet have been completed or rescheduled.
- ☐ Review GHL for any new paid clients from the morning. If any exist, notify Support to run Agent 3.
- ☐ Check for any escalation flags from the morning that have not received a DocTA Dwight response. Follow up if DocTA has not responded within 2 hours.

End of Day Checklist

Complete these steps each day before signing off:

- ☐ Operations: Run Agent 6 afternoon mode. Enter all call outcomes from Coach Prince.
- ☐ Review the Unreviewed Reports panel. Mark all reviewed reports with your name and notes.
- ☐ GHL: Confirm all new leads from today have been correctly routed (hot to direct call / warm to nurture / cool to drip).
- ☐ Log any open issues or incomplete tasks in the team operations log.
- ☐ Confirm that any protocol interaction flags submitted to DocTA Dwight today have received a review decision (approve, modify, or hold). If not, escalate before end of day.
- ☐ Monday only: Run Agent 7 (Compliance & QA Monitor) for the weekly compliance scan.

> 📋 **MANAGER NOTE**
> End of day is not the same as "whenever I finish." The End of Day Checklist must be completed before 5:30 PM or before your shift ends, whichever comes first. Incomplete SOPs should be noted in the daily team log and addressed in the next morning's huddle.

Chapter 8: Troubleshooting

Use this section whenever something does not work as expected. For each issue, follow the steps in the order given. If you reach the end of a troubleshooting sequence without resolving the issue, escalate to your manager.

Issue: The Run Agent Button Does Not Respond

Step	Action
1	Wait 10 seconds and try again. The button may be processing a previous click.
2	Check the status indicator on the agent card. If it shows Yellow, the agent is already running — do not click again.
3	Refresh the page (press F5 or Cmd+R). Do not use the browser back button.
4	Check the API Health panel. If the relevant integration shows Red, the agent cannot run until the connection is restored. Note the time and report to your manager.
5	Try using a different web browser (Chrome is the recommended browser for this dashboard).
6	If none of the above work, log the issue in the team operations log with the time, agent name, and browser used. Escalate to your manager immediately.

Issue: The Report Does Not Appear After the Agent Runs

Step	Action
1	Wait 2 minutes. Complex reports (especially Agent 2 and Agent 7) can take up to 2 minutes to generate.
2	Click the Refresh Report button if it appears on the agent page.
3	Navigate to Reports > History and search for the most recent run of this agent. The report may be there even if the agent page did not display it.
4	Clear your browser cache (Ctrl+Shift+Delete or Cmd+Shift+Delete) and log back in.
5	Check whether other team members can see the report. If they can, the issue is with your browser session — log out and log back in.
6	If the report is missing for all users, escalate to your manager immediately. Do not re-run the agent more than once without manager approval.

Issue: API Health Shows a Red Status

Integration Affected	First Action

Maya RetellAI	Check the RetellAI status page (retellai.com/status). If RetellAI is down system-wide, document calls manually until restored.
GoHighLevel (GHL)	Check status.gohighlevel.com. If GHL is operational, try disconnecting and reconnecting the GHL integration in Settings > Integrations.
MBCP (Client Portal)	Check whether the portal itself is accessible at mayanbotanicals.com/client-portal. If the portal is down, notify DocTA Dwight immediately.
DDPB (Protocol Builder)	The DDPB is an internal tool. If it shows Red, contact your system administrator. Meal plan requests must be processed manually until restored.
WooCommerce	Check the WooCommerce store at mayanbotanicals.com/shop. If orders are processing normally, try refreshing the connection in Settings > Integrations.

⚠ **WARNING**

If more than one integration shows Red at the same time, this may indicate a broader server or network issue. Contact DocTA Dwight and your hosting provider (ChemiCloud) immediately. Do not continue running agents until at least the primary integrations (GHL and MBCP) are restored.

Issue: A Link in the Dashboard or Report Is Broken

Step	Action
1	Copy the link URL and paste it into a new browser tab to verify it is truly broken vs. a display issue.
2	Check whether the linked resource (a client portal file, a GHL contact, etc.) still exists.
3	If a client portal file link is broken, go to MBCP > Client > Files and verify the file is still uploaded.
4	If a GHL link is broken, log into GHL directly (app.gohighlevel.com) and verify the contact or campaign still exists.
5	Log the broken link in the team operations log with the agent name, report date, and the broken URL. Escalate to your manager.

Chapter 9: Compliance & Brand Guardrails

Mayan Botanicals operates as an educational wellness practice. Every team member — regardless of role — is responsible for ensuring that all client communications, content, and recommendations stay within the legal and ethical boundaries described in this section.

The Core Principle: Educational Wellness Support Only

Everything Mayan Botanicals provides — protocols, meal plans, supplement recommendations, coaching calls — is educational wellness information. It is not medical advice, medical treatment, or medical diagnosis. This is not just a legal disclaimer; it is the true nature of what we do. We educate clients about herbal and lifestyle approaches that may support their body's natural healing processes.

🚨 **IMPORTANT**

If a team member is ever unsure whether a statement crosses the line from education into medical advice, the answer is always to pause and ask DocTA Dwight before sending or publishing the content.

Prohibited Language — Never Use

- "This product will cure [condition name]."
- "Our protocol treats diabetes / hypertension / metabolic syndrome."
- "Stop taking your medication and use our herbs instead."
- "This is guaranteed to reverse your A1C in [X] months."
- "This herb is clinically proven to diagnose [condition]."
- Any statement that makes a guarantee about a specific health outcome for a specific client.
- Any statement that identifies a specific client by name in public content.

Preferred Compliant Language — Always Use

Instead of this	Say this instead
"Cures diabetes"	"Supports healthy blood sugar levels"
"Treats high blood pressure"	"May support healthy blood pressure within a balanced lifestyle"
"Reverses your A1C"	"Supports the metabolic health goals outlined in your personalized protocol"
"Stop your medication"	"Work alongside your healthcare provider — our program is designed to complement, not replace, your medical care"
"Guaranteed results"	"Clients who follow the full protocol consistently report meaningful progress — individual results vary"

Escalation Rules for Safety-Sensitive Client Messages

The following situations require immediate escalation to DocTA Dwight. Do not attempt to handle these alone:

63. A client reports a blood sugar reading above 400 mg/dL.
64. A client mentions they have been hospitalized recently or are currently in a hospital.
65. A client asks whether they should stop insulin or a prescription medication.
66. A client or lead mentions any thoughts of self-harm or hopelessness.
67. A client reports an adverse reaction to a supplement or meal plan item.
68. A client or lead discloses a cancer diagnosis, organ failure, pregnancy, or other high-risk condition.

To escalate: use the Red Flag button in the relevant agent report, select the escalation reason, add a brief note, and click Submit. DocTA Dwight will receive an immediate notification. For any situation you assess as a potential life emergency, call DocTA Dwight directly by phone — do not rely solely on the dashboard notification.

FTC and Testimonial Guidelines

- Any client testimonial used in marketing must be accompanied by a disclosure: "Results not typical. Individual results vary."
- Do not use testimonials that include specific numerical claims (e.g., "I dropped my A1C from 10.5 to 6.1 in 4 months") without explicit written consent from the client AND review by DocTA Dwight.
- All marketing claims must be based on the educational framework — we do not make drug or treatment claims.

Chapter 10: KPI Tracking Guidance

Key Performance Indicators (KPIs) are the numbers that tell you whether the practice is healthy and growing. The dashboard provides data for all of the KPIs below. This section explains what to measure, when, and how managers should use this data to coach the team.

Daily KPIs

KPI	Target
Hot leads contacted within 30 minutes	100%
New clients onboarded within 2 hours of payment	100%
Coach Prince calls completed vs. scheduled	90%+
API health status (all green)	100%
Agent reports reviewed and logged	100% by day end

Weekly KPIs

KPI	Target
GHL email open rate	28%+
GHL SMS response rate	15%+
Compliance score	95+
Stuck contacts in GHL workflows	0 by Friday
Clients at risk (no portal login in 14+ days)	0
Meal plans delivered on schedule	100%

Monthly KPIs

KPI	Target
New clients enrolled	Growth vs. prior month
Client 30-day retention rate	95%+
Maya AI lead-to-consult conversion rate	20%+

Average lead score for hot leads	8.0+
Protocol delivery within 48 hours of onboarding	100%

How Managers Should Coach from Dashboard Outputs

The dashboard is a coaching tool, not a surveillance tool. Here is how to use it effectively:

Weekly Review Meeting (15–20 minutes)

69. Open the Reports History panel and pull up the Agent 5 campaign scoreboard and the Agent 7 compliance score for the week.
70. Share the numbers with the team — celebrate wins, acknowledge what needs improvement.
71. Pick one specific KPI that is below target. Ask the relevant team member: "What do you think is causing this? What would help?" Listen first, then offer guidance.
72. Choose one flagged compliance item from the Agent 7 report. Read the flagged phrase and the compliant alternative out loud. Make it a learning moment, not a disciplinary one.

📋 **MANAGER NOTE**

The most effective use of this dashboard in coaching is to make outcomes visible and specific. Instead of saying "we need to follow up with leads faster," show the team member the Agent 1 report and say: "We had three hot leads last Tuesday where the first contact took over 2 hours. Let's look at what happened that morning and figure out how to prevent that." Specific is kind.

Chapter 11: New Team Member Onboarding Plan

Every new Mayan Botanicals team member should complete the following onboarding milestones before operating the dashboard independently. The onboarding manager is responsible for signing off on each milestone.

Day 1 Milestones

- Received dashboard login credentials and logged in successfully.
- Completed a guided tour of the Home screen and navigation bar with onboarding manager.
- Read Chapters 1, 2, and 3 of this manual.
- Successfully ran Agent 1 (Maya Lead Intelligence) with the onboarding manager observing.
- Reviewed the output of Agent 1 and identified at least one hot lead, one warm lead, and one cool lead.
- Understood the escalation rule for flagged leads and can describe it without prompting.
- Reviewed the API Health panel and confirmed all integrations are green.

📋 **MANAGER NOTE**
Day 1 is primarily observational. The new team member should watch first, then try with supervision. Do not leave them to run agents independently until Day 2 or later.

Week 1 Milestones (Days 2–5)

- Successfully ran all 7 agents at least once with the onboarding manager observing.
- Completed the Daily Use SOP (Start of Day, Midday, End of Day) independently for 3 consecutive days.
- Reviewed a full Agent 7 Compliance & QA Report and correctly identified at least 2 flagged items and their compliant alternatives.
- Demonstrated the escalation process (flagging a red lead) in a simulated scenario with the onboarding manager.
- Logged at least 5 agent reports with review notes in the Reports History panel.
- Read Chapters 4–9 of this manual.
- Passed the 10-Question Knowledge Check Quiz (found at the end of this manual) with a score of 80% or higher.

Week 2 Milestones (Days 6–10)

- Operates the dashboard fully independently for their assigned role workflow.
- Has completed at least one full client journey cycle: lead (Agent 1) → onboarding (Agent 3) → protocol (Agent 2) → meal plan (Agent 4) → follow-up (Agent 6).
- Completed the Weekly KPI review meeting with their manager using live dashboard data.

- Can troubleshoot at least 3 common issues from the Troubleshooting section without referring to the manual.
- Read Chapters 10–12 of this manual.
- Signed and returned the Compliance Acknowledgment form confirming they understand the brand guardrails and escalation rules.

💡 **PRO TIP**

The goal of the two-week onboarding is competence, not speed. If a team member needs an extra day on any milestone, that is completely normal. What matters is that they can operate confidently and safely, not quickly.

Chapter 12: Glossary of Key Terms

The following terms are used throughout this manual and throughout the dashboard. Refer to this section whenever you encounter an unfamiliar term.

Term	Definition
A1C	Hemoglobin A1C — a blood test that measures average blood sugar levels over 2–3 months. Used to monitor progress in the Sweet Blood Protocol.
Agent	One of the seven automated tools on the Mayan Botanicals dashboard. Each agent performs a specific operational function when activated.
DDPB	DocTA Dwight Protocol Builder — the internal meal planning and protocol generation system built by and for DocTA Dwight.
Escalation	The process of flagging a situation for immediate review by DocTA Dwight because it involves a health safety concern or compliance issue.
GHL	GoHighLevel — the CRM (Customer Relationship Management) and marketing automation platform used to manage all leads, clients, campaigns, and communications.
Hot Lead	A lead scored 7 or above by Agent 1, indicating high interest and readiness to book a consultation.
Interaction Flag	An alert from Agent 2 indicating a potential conflict between a herbal supplement and a client's current prescribed medication. Requires DocTA Dwight review.
KPI	Key Performance Indicator — a measurable value that shows how effectively the practice is achieving its goals.
MBCP	Mayan Botanicals Client Platform — the secure online portal where clients access their personalized files, protocols, meal plans, and communications.
Maya AI	The AI voice agent powered by RetellAI, operating on (470) 594-5609, that handles inbound calls and qualifies leads before routing them to the team.
Protocol	A personalized health support plan generated by the Sweet Blood Protocol Agent, covering herbal supplements, dietary guidance, lifestyle modifications, and milestone tracking.
QA	Quality Assurance — the process of reviewing work to ensure it meets Mayan Botanicals' standards for accuracy, compliance, and client care.
RetellAI	The technology platform that powers the Maya AI voice agent. Provides call transcripts and recordings to the Maya Lead Intelligence Agent.
Report	The output produced by an agent after it runs. Reports contain a summary, findings, recommended actions, and any flags or escalations.
SOP	Standard Operating Procedure — a documented step-by-step process that team members follow to ensure consistent results.
Status Indicator	The colored circle on each agent card that shows whether the agent is ready to run, currently running, or needs attention.

Stuck Contact	A GHL contact who has entered a campaign workflow but has not progressed to the next step in more than 48 hours.
Sweet Blood Protocol	The flagship Mayan Botanicals program for supporting metabolic health and A1C reduction, developed by DocTA Dwight.
WooCommerce	The e-commerce platform connected to mayanbotanicals.com that processes product purchases and program enrollments.

Chapter 13: Quick Reference Appendix

This appendix includes the quick-reference guide content for fast daily lookup and handoff support.

MAYAN BOTANICALS DASHBOARD

Quick Reference Cheat Sheet

Agent	Purpose & Daily Trigger
1 — Maya Lead Intelligence	Qualify & route Maya AI leads | Run 2x daily (AM + PM) | Who: Sales/Concierge
2 — Sweet Blood Protocol	Generate personalized A1C protocol | Run per new client + 30/60/90-day check-ins | Who: Operations
3 — Client Onboarding	Set up portal + send welcome package | Run within 2 hrs of payment | Who: Support
4 — Meal Planning	Create weekly therapeutic meal plan | Run weekly per active client | Who: Operations
5 — GHL Campaign Automation	Monitor campaigns + fix stuck contacts | Run daily AM | Who: Sales/Concierge
6 — Coach Prince Follow-Up	Generate call list + log outcomes | Run AM (call list) + PM (outcomes) | Who: Operations
7 — Compliance & QA Monitor	Scan content for brand compliance | Run every Monday + before major campaigns | Who: Leadership/QA

Lead Score	Action Required
8–10 (Hot)	Call within 30 minutes. Offer consult directly.
5–7 (Warm)	Add to GHL Warm Nurture sequence. Coach Prince task in 48 hrs.
1–4 (Cool)	Add to GHL Educational Drip. No immediate call.
Red Flag	ESCALATE TO DOCTA DWIGHT IMMEDIATELY. Do not call the lead.

Status Indicator	Meaning
Green	Ready / Reviewed
Yellow	Running — do not interrupt
Blue	Report ready — not yet reviewed
Red	Error or escalation flag — needs immediate attention
Gray	Not run today — check your SOP

ESCALATION TRIGGERS — CALL DOCTA DWIGHT IMMEDIATELY

Trigger	Required Action
Blood sugar > 400 mg/dL	Red flag button + call DocTA Dwight by phone
Client mentions stopping insulin/medication	Red flag button + call DocTA Dwight by phone
Any self-harm or hopelessness language	Red flag button + call DocTA Dwight by phone — do NOT call the lead
Adverse supplement reaction	Red flag button + log "Adverse Food Event" in GHL + call DocTA Dwight
Compliance breach (cure/treat/diagnose claims sent)	Pause GHL campaign + call DocTA Dwight

NEVER SAY: cure / treat / diagnose / guaranteed / stop your medication
ALWAYS SAY: support / nourish / complement / work alongside your healthcare provider

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Chapter 14: Knowledge Check Appendix

This appendix includes the full knowledge check quiz and answer key used in team onboarding.

MAYAN BOTANICALS 7-AGENT DASHBOARD

Knowledge Check Quiz — 10 Questions with Answer Key

Instructions: Read each question carefully and select the best answer. A score of 80% or higher (8 out of 10 correct) is required to operate the dashboard independently. If you score below 80%, review the relevant sections of the Training Manual with your onboarding manager before retaking the quiz.

Question 1: A Maya AI lead receives a score of 9 out of 10 in the Agent 1 report. What is the correct first action?

A) Add the lead to the GHL Educational Drip sequence and wait for them to re-engage.

B) Call the lead within 30 minutes and offer to book a complimentary consultation.

C) Run Agent 3 to onboard the lead into the client portal.

D) Escalate the lead to DocTA Dwight for personal review.

Answer: B — Call the lead within 30 minutes and offer to book a complimentary consultation.

Explanation: Hot leads (scored 7–10) require direct, personal outreach within 30 minutes. Automated sequences are for warm and cool leads only. Running Agent 3 is premature — the lead has not yet paid or agreed to enroll.

Question 2: The Agent 2 Sweet Blood Protocol report shows an Interaction Flag for a client. What should you do before delivering the protocol to the client?

A) Deliver the protocol to the client immediately — interaction flags are informational only.

B) Remove the flagged supplement from the protocol and then deliver it.

C) Submit the report to DocTA Dwight for review and wait for clearance before delivering anything.

D) Call the client's doctor to discuss the flag.

Answer: C — Submit the report to DocTA Dwight for review and wait for clearance before delivering anything.

Explanation: Interaction Flags always require DocTA Dwight review before the protocol is delivered to the client. No team member other than DocTA Dwight has the authority to decide whether a potential herb-drug interaction is acceptable.

Question 3: During a Coach Prince follow-up call, a client says they feel hopeless and that life is not worth living. What is the correct action?

A) Continue the call normally and note the comment in the call outcome form.

B) Transfer the client to a GHL nurture sequence for emotional support content.

C) End the call professionally, use the red flag button to escalate immediately, and notify DocTA Dwight by phone.

D) Ask the client if they would like to book a consultation with DocTA Dwight.

Answer: C — End the call professionally, use the red flag button to escalate immediately, and notify DocTA Dwight by phone.

Explanation: Any statement suggesting self-harm or hopelessness is a safety escalation that must go to DocTA Dwight immediately — by phone, not just the dashboard notification. This is non-negotiable regardless of context.

Question 4: What does a Blue status indicator on an agent card mean?

A) The agent is currently running and should not be interrupted.

B) The agent has encountered an error and cannot run.

C) The report is ready but has not yet been reviewed by any team member.

D) The agent has not been run today.

Answer: C — The report is ready but has not yet been reviewed by any team member.

Explanation: Blue means a report is waiting for review. Green means reviewed, Yellow means running, Red means error or escalation, and Gray means not run today.

Question 5: A client contacts you and says they stopped taking their blood pressure medication because they read that the Sweet Blood Protocol would replace it. What is your response?

A) Confirm that the protocol is designed to replace medications over time and reassure the client.

B) Do not comment on the medication decision. Log the interaction and escalate to DocTA Dwight immediately.

C) Tell the client to restart their medication and that the protocol cannot help them.

D) Send the client an educational email explaining that the protocol is optional.

Answer: B — Do not comment on the medication decision. Log the interaction and escalate to DocTA Dwight immediately.

Explanation: No team member should advise a client on medication decisions. This is a safety escalation that requires DocTA Dwight's personal review. Confirming or encouraging the medication stoppage would constitute giving medical advice, which is outside the scope of any team member's role.

Question 6: The Agent 5 Campaign Health report shows that 12 contacts are "stuck" in the Welcome Sequence. What does this mean and what should you do?

A) These contacts unsubscribed. Remove them from the system immediately.

B) These contacts entered the welcome workflow but have not progressed to the next step in over 48 hours. Investigate each contact's GHL record and resolve the block.

C) These contacts have been in the practice for over 48 hours and need a personal call from Coach Prince.

D) These contacts' email addresses have bounced. Archive them in GHL.

Answer: B — These contacts entered the welcome workflow but have not progressed. Investigate each contact's GHL record and resolve the block.

Explanation: Stuck contacts are a priority to resolve daily. The cause is often a data issue (missing phone, bounced email) — not an unsubscribe. Each stuck contact must be investigated individually.

Question 7: When running Agent 3 (Client Onboarding), which of the following must be verified before clicking "Run Agent"?

A) The client's cultural food preference for their meal plan.

B) The client has confirmed payment and the payment checkbox is ticked.

C) DocTA Dwight has personally reviewed and approved the client's intake form.

D) The client's phone number is saved in RetellAI.

Answer: B — The client has confirmed payment and the payment checkbox is ticked.

Explanation: Agent 3 must only be run after payment is confirmed. Running onboarding for an unpaid client would grant portal access before the client relationship is established. DocTA review is required for interaction flags in Agent 2, not for general onboarding.

Question 8: The Agent 7 Compliance report shows that a GHL email sent last week contained the phrase "this program reverses Type 2 Diabetes." What is the correct response?

A) Leave it — the email has already been sent and nothing can be done.

B) Log the flag in the compliance log, note corrective action, escalate to DocTA Dwight, and pause any campaigns using the same template.

C) Delete the email from the sent folder in GHL to remove the evidence.

D) Send a follow-up email to all recipients clarifying the statement.

Answer: B — Log the flag, note corrective action, escalate to DocTA Dwight, and pause campaigns using the same template.

Explanation: Compliance flags must be logged (not deleted), and any campaign using non-compliant language must be paused pending DocTA Dwight review. Deleting evidence is never acceptable. Sending a follow-up email should only be done under DocTA's direction.

Question 9: Agent 4 generates a weekly meal plan for a Nigerian food preference client in Phase 1 of the Sweet Blood Protocol. The Nutritional Summary shows one day with a carbohydrate total significantly above the program target (flagged orange). What is the best action?

A) Ignore the flag — orange flags are informational and do not affect the client.

B) Re-run the entire agent from scratch.

C) Use the Regenerate feature on the high-carb meal slots for that specific day.

D) Manually create a meal for that day outside the DDPB system.

Answer: C — Use the Regenerate feature on the high-carb meal slots for that specific day.

Explanation: Orange nutritional flags should be addressed, not ignored. However, the entire plan does not need to be re-run — the Regenerate feature replaces individual meal slots within the same cultural dataset and therapeutic category.

Question 10: A new team member completes their Day 1 onboarding and wants to run agents independently the next morning. Under the onboarding plan, is this appropriate?

A) Yes — if they read the manual on Day 1, they are ready for independent operation.

B) No — independent operation is only permitted after completing all Week 2 milestones, including the Knowledge Check Quiz with a score of 80%+ and the Compliance Acknowledgment form.

C) Yes — as long as they have a colleague they can call if needed.

D) No — new team members can never run agents without a manager present.

Answer: B — Independent operation is only permitted after completing all Week 2 milestones, including the Knowledge Check Quiz (80%+) and the Compliance Acknowledgment form.

Explanation: The two-week onboarding plan exists to protect clients and the practice. Running agents independently requires demonstrated competence, a passing quiz score, and a signed compliance acknowledgment. Having a colleague available is not a substitute for completing the full onboarding plan.

END OF KNOWLEDGE CHECK QUIZ

Score 8/10 or higher to qualify for independent dashboard operation.