Rovo: Complex Requests Step by Step

Rovo and AI · https://mriacrm.com/docs/rovo-complex-requests-step-by-step/

Complex requests, start to finish

Each recipe below is a real conversation with the Mria CRM Assistant on a test site with sample data. They show how far a single sentence can go, and how a short chat can take you from a question to a finished change. Swap in your own names, dates and values.

1. Triage this week's inbound leads

For a sales lead on Monday morning.

> *Which leads were created in the last two weeks, are still in New status and have nobody assigned? Show the company and source for each.*

> *Which of those companies already exist as company records in Mria CRM? For the ones that don't, list the lead's email domain so I know what to create.*

> *Create a company Fjordline Cruises AS in the travel industry, website fjordlinecruises.no, based in Bergen, Norway. Then add Ingrid Solberg, ingrid.solberg@fjordlinecruises.no, Head of Partnerships, as a contact at that company.*

What the assistant does

- Looks up the New status, then searches Leads by status, created date and no owner.
- For the follow-up, checks each name against the Company records and takes the domain from each Lead's email.
- For the create, checks the industry list, proposes Other for “travel”, asks, and shows two cards — the Company, then the Contact linked to it.

Which leads were created in the last two weeks, are still in New status and have nobody assigned? Show the company and source for each.

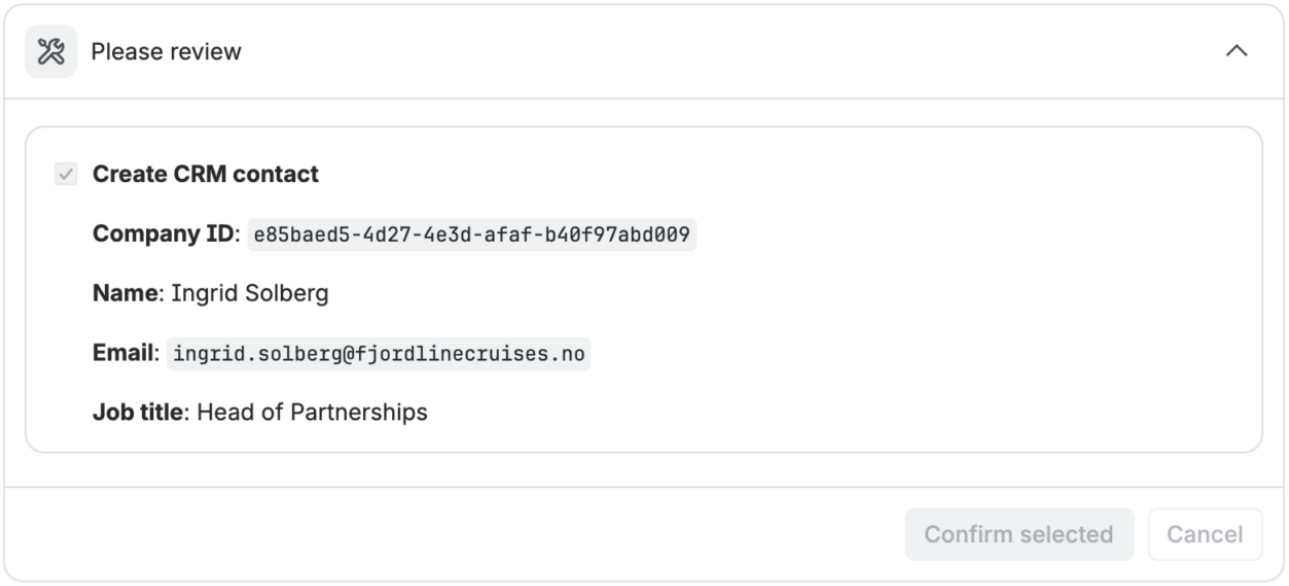
I found 8 leads created in the last two weeks that are in **New** status and have no assignee:

- LEAD - Rafael Costa
  - **Company:** Terra Vista Farms
  - **Source:** (Not specified)
- LEAD - Mei Tanaka
  - **Company:** Kiyomi Bakeries
  - **Source:** (Not specified)
- LEAD - Ingrid Solberg
  - **Company:** Fjordline Cruises AS
  - **Source:** (Not specified)
- LEAD - Marcus Webb
  - **Company:** Alder Ridge Outfitters
  - **Source:** (Not specified)
- LEAD - Priya Nair
  - **Company:** Meridian Hospitality Group
  - **Source:** (Not specified)
- LEAD - Jonas Berg
  - **Company:** Riverside Bikes AB
  - **Source:** (Not specified)
- LEAD - Elena Marchetti
  - **Company:** Harborview Dental Group
  - **Source:** (Not specified)
- Website inquiry: Northwind Logistics
  - **Company:** Northwind Logistics
  - **Source:** (Not specified)

Which of those companies already exist as company records in Mria CRM? For the ones that don't, list the lead's email domain so I know what to create.

None of these companies currently exist as company records in Mria CRM. Here are the email domains for each lead to help you create them:

- **Terra Vista Farms**: `terravistafarms.br`
- **Kiyomi Bakeries**: `kiyomibakeries.jp`
- **Fjordline Cruises AS**: `fjordlinecruises.no`
- **Alder Ridge Outfitters**: `alderridgeoutfitters.com`
- **Meridian Hospitality Group**: `meridianhospitality.com`
- **Riverside Bikes AB**: `riversidebikes.se`
- **Harborview Dental Group**: `harborviewdental.com`
- **Northwind Logistics**: `northwindlogistics.com`



I've created the company and added the contact:

- **Company**: Fjordline Cruises AS has been created in the "Other" industry.
- **Contact**: Ingrid Solberg has been added as Head of Partnerships at Fjordline Cruises AS.

Try also

- *“Assign the three oldest of those leads to Maria and the rest to me, one by one.”*
- *“Which of those leads already have a contact with the same email?”*

2. Check what a colleague left unfinished

For a manager, or anyone covering for a colleague.

> *Find all leads John Doe created last week that weren't converted. For each one, tell me its status, who it is assigned to, and whether anything is planned on it — an open task or an upcoming meeting.*

What the assistant does

- Searches Leads by created date, then checks who created each one and whether it was converted — a converted Lead from the same period is left out.
- Reads the planned activities of every match.

The same question asked about the person running the test:

Find all leads created in the last 30 days by Nataliia Timoshyna that haven't been converted yet. For each one, tell me its status, who it is assigned to, and whether anything is planned on it - an open task or an upcoming meeting.

I found 7 unconverted leads created by Nataliia Timoshyna in the last 30 days. All of them are currently in the **New** status, assigned to Nataliia, and have no upcoming tasks or meetings planned.

- LEAD - Rafael Costa
  - **Status:** New
  - **Assignee:** Nataliia Timoshyna
  - **Planned:** Nothing scheduled
- LEAD - Ingrid Solberg
  - **Status:** New
  - **Assignee:** Nataliia Timoshyna
  - **Planned:** Nothing scheduled
- LEAD - Marcus Webb
  - **Status:** New
  - **Assignee:** Nataliia Timoshyna
  - **Planned:** Nothing scheduled
- LEAD - Priya Nair
  - **Status:** New
  - **Assignee:** Nataliia Timoshyna
  - **Planned:** Nothing scheduled
- LEAD - Jonas Berg
  - **Status:** New
  - **Assignee:** Nataliia Timoshyna
  - **Planned:** Nothing scheduled
- LEAD - Elena Marchetti
  - **Status:** New
  - **Assignee:** Nataliia Timoshyna
  - **Planned:** Nothing scheduled
- Website inquiry: Northwind Logistics
  - **Status:** New
  - **Assignee:** Nataliia Timoshyna
  - **Planned:** Nothing scheduled

Try also

- *“Add a task ‘Intro call’ due Friday to each of those leads that has nothing planned, assigned to me.”*
- *“Which of John's leads from last month were converted, and into which deals?”*

3. Find the deals that went quiet

For a pipeline review.

> *Which open deals have had no activity in the last 14 days? For each, give the stage, amount and primary contact, then the total amount and the probability-weighted total.*

What the assistant does

- Searches open Deals by last activity date.
- Reads each Deal's stage probability and adds up both totals — 8,350 and 3,915 here, the weighted figure counting each Deal at its stage's probability.

> Which open deals have had no activity in the last 14 days? For each, give the stage, amount and primary contact, then the total amount and the probability-weighted total.

I found 4 open deals with no activity in the last 14 days:

- Demo Deal
  - **Stage:** New (20%)
  - **Amount:** 0
  - **Primary Contact:** David Smith [SAMPLE]
- Website Redesign [SAMPLE]
  - **Stage:** New (20%)
  - **Amount:** 5,000
  - **Primary Contact:** Olivia Mendez [SAMPLE]
- Mobile App Project [SAMPLE]
  - **Stage:** Negotiation (80%)
  - **Amount:** 1,000
  - **Primary Contact:** David Smith [SAMPLE]
- SaaS Subscription [SAMPLE]
  - **Stage:** Proposal (90%)
  - **Amount:** 2,350
  - **Primary Contact:** John Carter [SAMPLE]

Totals:

- **Total Amount:** 8,350
- **Probability-Weighted Total:** 3,915

Try also

- *“Break that down by stage.”*
- *“Add a task for each deal's owner to follow up on Monday.”*

4. Prepare for a customer call

Five minutes before the call.

> *Give me the full picture of Northwind Retail: its contacts, every deal with stage, amount and whether it was won or lost, and any open leads.*

What the assistant does

- Finds the Company, then reads its Contacts, its Deals — open and closed — and its Leads.
- Points out that the only Lead is Lost rather than leaving it out silently.

> Give me the full picture of Northwind Retail: its contacts, every deal with stage, amount and whether it was won or lost, and any open leads.

Here is the full picture for Northwind Retail [SAMPLE]:

Contacts

- David Smith [SAMPLE] — Software Engineer

Deals

- Demo Deal
  - **Stage:** New (Open)
  - **Amount:** 0
- Mobile App Project [SAMPLE]
  - **Stage:** Negotiation (Open)
  - **Amount:** 1,000
- HR Software License [SAMPLE]
  - **Stage:** Lost (Closed)
  - **Amount:** 7,500

Leads

- There are currently **no open leads** for Northwind Retail. (One lead, LEAD - David Smith [SAMPLE], is in **Lost** status).

Try also

- *“What changed on their deals in the last month, and who changed it?”*
- *“Which Jira work items are linked to Northwind Retail, and what status are they in?”*

5. Write up a call in one message

Right after the call, while it is fresh.

> *On the Website Redesign deal: move it to Proposal, raise the amount to 6,500, set the closing date to November 28, add a note “Sent revised proposal with a phased rollout”, and add a task for me to follow up next Tuesday.*

What the assistant does

- Finds the Deal and the Proposal stage, and works out the date of next Tuesday.
- Shows one card with three items — the Deal update, the note and the task — each with its own checkbox.

Yes, go ahead

Please review

Update CRM data

Method: `PATCH`

Path: `/v1/deals/0ecb28b3-8b12-4abb-9bca-efaf54240f9a`

Amount: `6500`

Close Date: `2026-11-28T23:59:59Z`

Pipeline Stage ID: `dfa93874-4c7b-4539-b430-8a56c947ca86`

Create CRM data

Path: `/v1/deals/0ecb28b3-8b12-4abb-9bca-efaf54240f9a/notes`

Content: `Sent revised proposal with a phased rollout`

Create CRM data

Path: `/v1/deals/0ecb28b3-8b12-4abb-9bca-efaf54240f9a/tasks`

Assignee ID: `your account ID`

Due Date: `2026-10-20T09:00:00Z`

Status ID: `7ada1db3-bac0-486e-8a55-25090dd35784`

Title: `Follow up`

Confirm selected | Cancel

I've updated the Website Redesign [SAMPLE] deal:

- **Stage**: Moved to **Proposal**.
- **Amount**: Raised to **6,500**.
- **Closing Date**: Set to **November 28, 2026**.
- **Note**: Added "Sent revised proposal with a phased rollout".
- **Task**: Added a "Follow up" task for you, due next **Tuesday, October 20**.

Try also

- *“Add Olivia Mendez as a second contact on that deal and book a meeting with her for next Wednesday at 10:00.”*

6. Turn a qualified lead into a deal

When the lead is ready.

> *Convert the Mei Tanaka lead into a deal called Kiyomi Bakeries POS rollout, amount 12,000, in the Discovery stage of the Main Pipeline.*

What the assistant does

- Finds the Lead and the Discovery stage of that pipeline, and shows the conversion on the card.

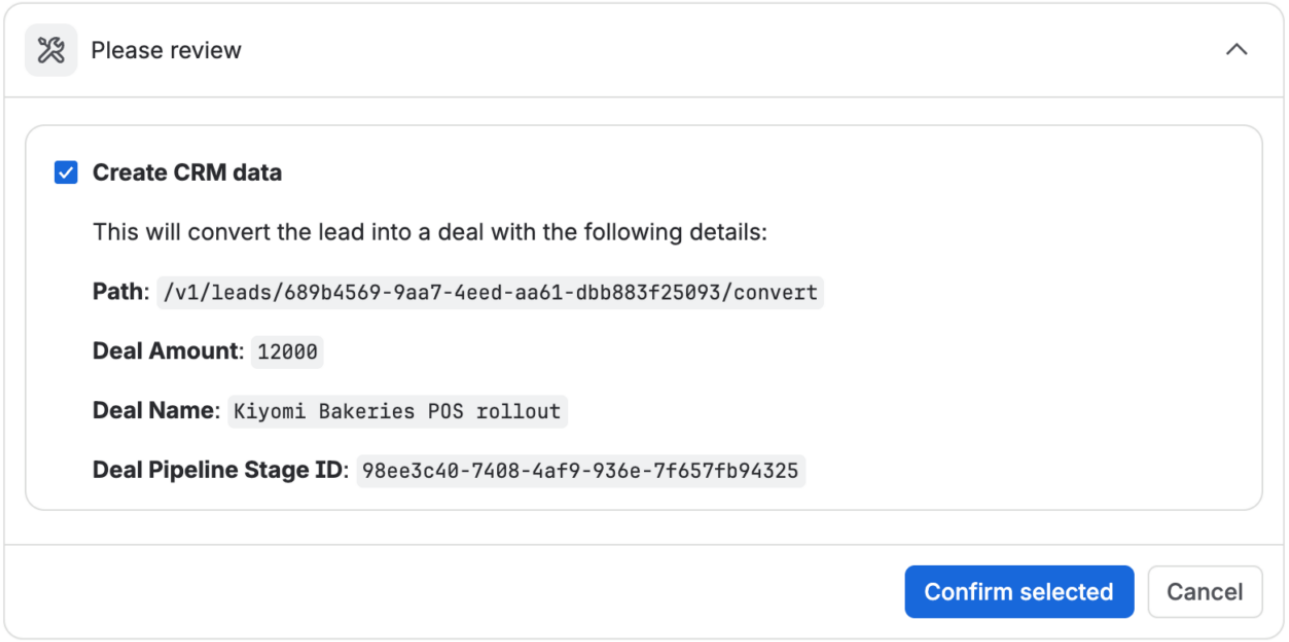
Convert the Mei Tanaka lead into a deal called Kiyomi Bakeries POS rollout, amount 12,000, in the Discovery stage of the Main Pipeline.

I'll convert the lead **LEAD - Mei Tanaka** into a new deal:

- **Deal Name**: Kiyomi Bakeries POS rollout
- **Amount**: 12,000
- **Pipeline Stage**: Discovery (in the Main Pipeline)

Shall I proceed with this conversion?

Yes, convert it



Try also

- *“Convert it, create the company Kiyomi Bakeries for it, and move the lead's notes and links to the deal.”*

7. Compare delivery and sales

For anyone whose Deals depend on work tracked in Jira.

> *Which open deals are expected to close before the end of the year, are worth more than 2,000 and aren't linked to any Jira work item yet? Sort them by amount and give me the total and the weighted total.*

> *Then show me the open deals that are linked to Jira, with the work item key and title, the deal's stage, amount and closing date.*

What the assistant does

- Searches open Deals by closing date, amount and linked work items — and says plainly when nothing matches, offering to widen the search.
- For the follow-up, reads the linked work items of each Deal.

Which open deals are expected to close before the end of the year, are worth more than 2,000 and aren't linked to any Jira work item yet? Sort them by amount and give me the total and the weighted total.

I couldn't find any open deals worth more than 2,000 that are expected to close before the end of the year and aren't linked to a Jira work item.

If you'd like, I can broaden the search—for example, by looking for deals with a later close date or a lower amount.

Then show me the open deals that are linked to Jira, with the work item key and title, the deal's stage, amount and closing date.

I found 2 open deals linked to Jira work items:

- **Website Redesign [SAMPLE]**
  - **Jira Item:** `SCRUM-1` — *Start here: Add your team's work*
  - **Stage:** Proposal (90% probability)
  - **Amount:** 6,500
  - **Closing Date:** Nov 28, 2026
- **SaaS Subscription [SAMPLE]**
  - **Jira Item:** `SUP-1` — *Help me set up the software*
  - **Stage:** Proposal (90% probability)
  - **Amount:** 2,350
  - **Closing Date:** *Not set*

Try also

- *"Which deals are linked to work items that are still To Do?"*

8. Follow up a campaign on exactly the right leads

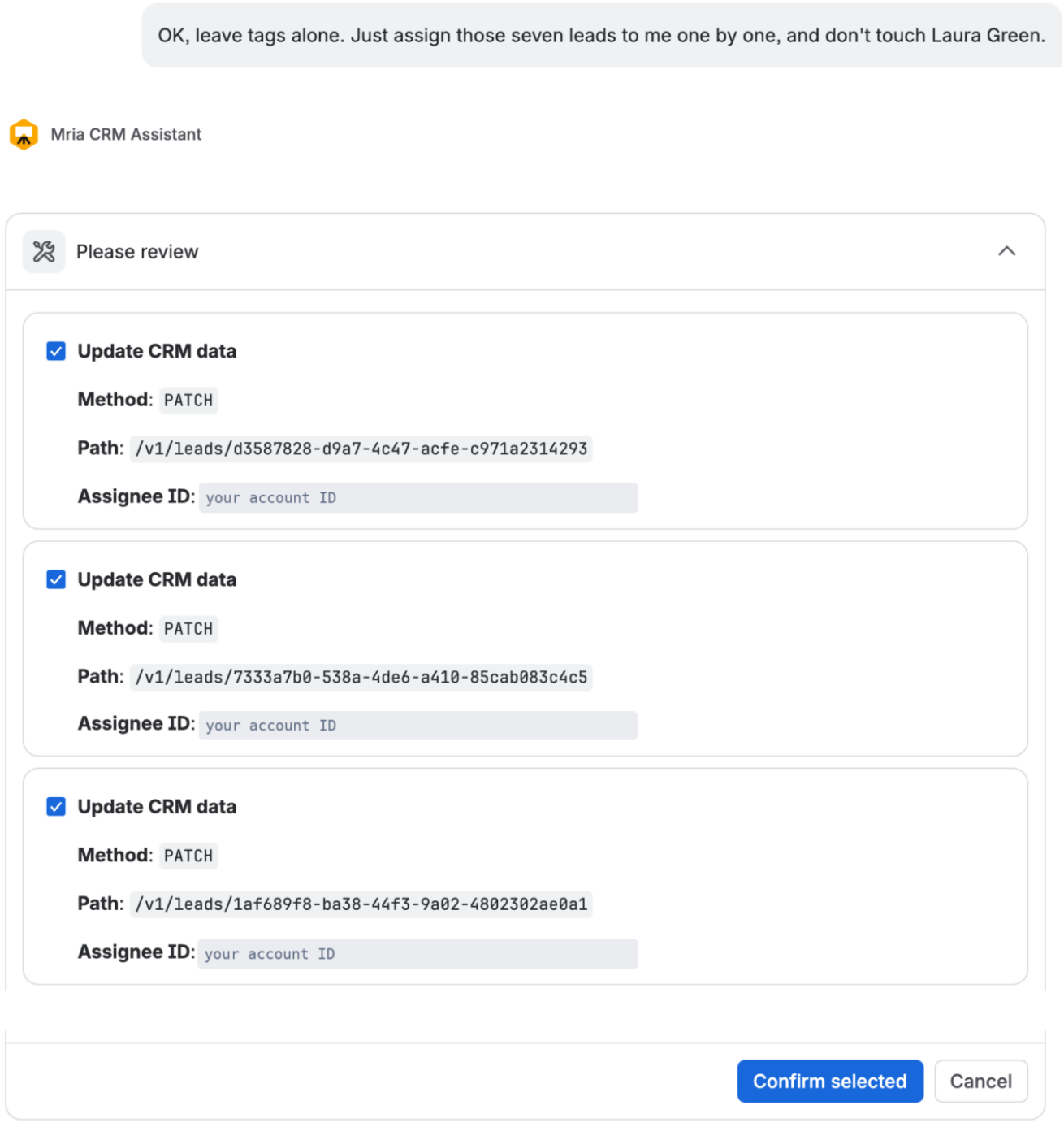
When a bulk change must not reach further than you meant.

> *Tag every New lead created this month that has nobody assigned with "Q4 outreach", and assign them all to me.*

> *OK, leave tags alone. Just assign those seven leads to me one by one, and don't touch Laura Green.*

What the assistant does

- The first request becomes a bulk change filtered on status alone, which would also reach older and already-assigned New Leads — so it is cancelled.
- The second becomes seven single changes, one per Lead, all on one card.



Why the first card was cancelled is explained on Bulk Changes to Leads.

Related Pages

- Rovo: Finding Information — questions across leads, deals, contacts, companies and products.
- Rovo: Creating and Updating Records — new records, edits, notes, tasks, conversions and closing deals.

- Rovo: Bulk Changes to Leads — one change on many leads, and the limits that apply.
- Rovo: Permissions and Safety — for admins: whose rights apply and what can never happen.
- Rovo Studio: Build Your Own Agent — use the same CRM tools in an agent you design.