



Walkthrough: Building an AI Email Assistant with Lindy

This guide will show you how to set up an **AI email assistant in Lindy** that automatically drafts responses to customer inquiries—using your website and uploaded PDFs as its knowledge base. The assistant will **draft replies only**, ensuring human oversight and confidence in accuracy before sending.

The major steps are:

- **Connect your inbox** so the assistant can monitor incoming messages.
 - **Add your knowledge base** by uploading your website content and internal docs, such as PDFs.
 - **Test and Review** to make sure your agent is working properly in your initial setup.
 - **Roll out gradually** to ensure your agent works as expected in real world circumstances.
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Step 1. Sign Up and Access the Dashboard

1. Go to lindy.ai and create an account.
 2. Log into the **Lindy Dashboard**.
 3. From the sidebar, select **Agents** → **New Agent**.
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Step 2. Create Your Email Assistant

1. Choose **Email Responder**, to quickly get a useful template as a starting point.

What would you like to automate?



Build an agent or perform a task



Or choose from our templates:



Personal Computer Assistant

Your smart computer companion



Lead Generator

Find and organize leads instantly



Lead Outreach

Automated sales outreach and...



Support Slackbot

Custom Slackbot to respond to...



Email Responder

Automate email replies



Meeting Notetaker

Captures key meeting details,...



Start from scratch



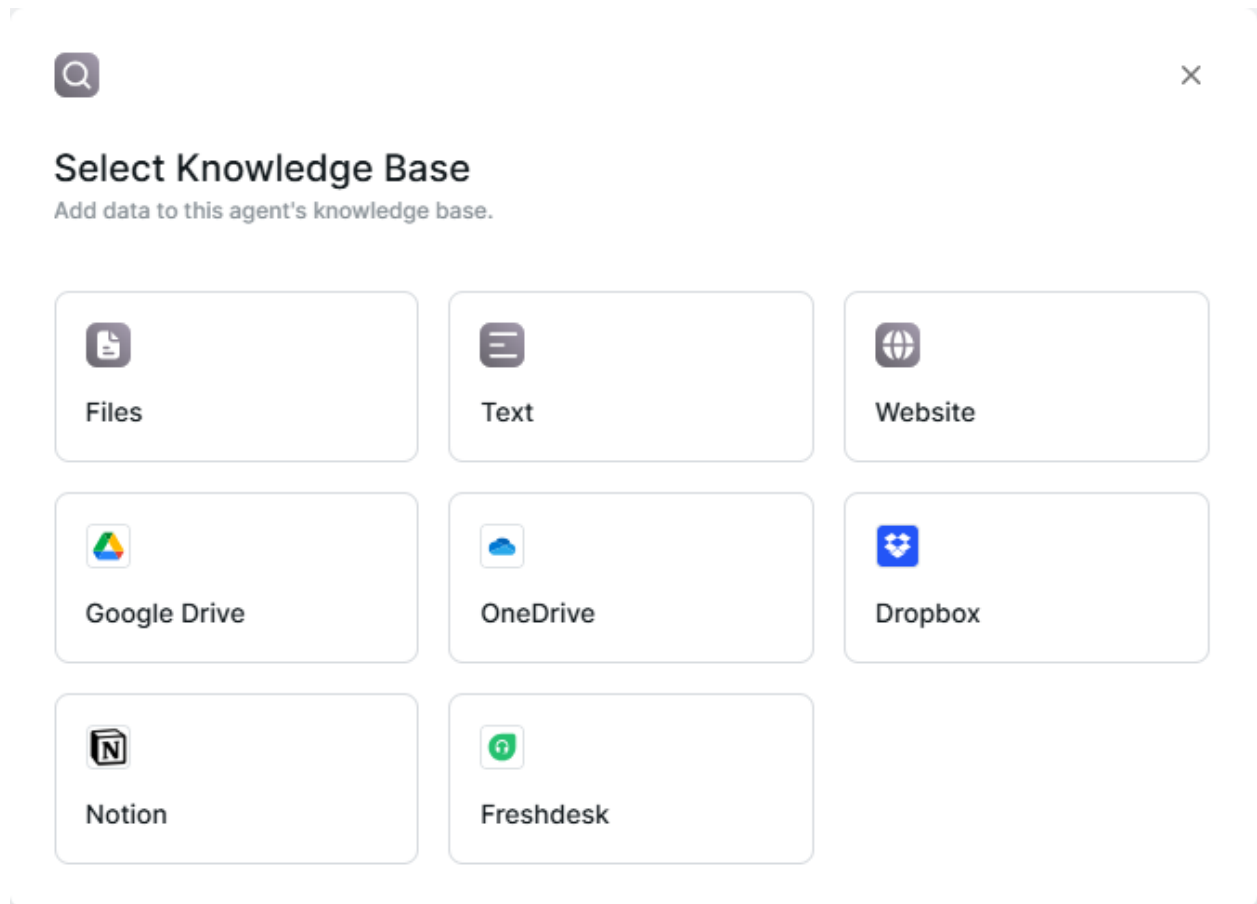
Explore templates

2. Click **Add** to create the agent from the template.
3. Connect your Gmail account when prompted, following the instructions to authorize access. (Note: Lindy supports Outlook as well)
4. The Agent automatically includes a **Requires Response?** step to identify emails that ask questions about your service, product, or company.

Step 3. Add Your Knowledge Base

Your assistant needs accurate company knowledge to reply properly.

1. In the agent's workflow, click on the **Check knowledge base** box. This will bring up a set of options for adding relevant sources.



2. Select **Website**, paste in your company's main URL or product pages. Choose **Add single link**, or **Crawl** if you'd like to add a set of webpages.
3. Choose **Files** to upload PDFs or other documents, or link to content from your Google Drive, Dropbox, etc. Examples could include FAQs, product manuals, onboarding guides, or policies.
4. The Agent automatically includes a **Found Response?** step to determine if an answer to the emailer's question was found within the knowledge base.

Step 4. Test and Review

1. Click on the Respond box, and scroll to the bottom of the right menu. Confirm **Save as Draft?** is enabled, to ensure no response is sent without human review. This menu also allows you to configure other options for the email response.
 2. Send a test inquiry from a personal email (e.g., a fake customer question) to the mailbox that you connected the agent to.
 3. Click **Test** in the top right corner. Then, click on the **Email Received** box. You should see a list of emails in that Inbox; select your test email.
 4. **Evaluate the response**, by watching the test flow, and opening the draft prepared by your assistant.
 5. Check:
 - Is it accurate?
 - Is the tone appropriate?
 - Did it cite the right knowledge source?
 6. Revise your knowledge base or prompts as needed.
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Step 5. Roll Out Gradually

- To enable the agent, click **Deploy** in the upper right corner and ensure the agent's enable toggle (located in the upper left) is turned on.
 - Start with **internal testing** (your team sending sample inquiries).
 - Then allow the assistant to draft real customer responses, but **review every draft**.
 - After 1–2 weeks of successful drafts, decide whether to enable **auto-send** for routine inquiries (optional).
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Step 7. Maintain and Improve

- Regularly upload updated PDFs (e.g., new product sheets, updated FAQs).
- Review draft accuracy weekly.
- Add edge cases or tricky questions to the knowledge base.

Outcome

With this setup, you'll have an AI email assistant that:

- Responds faster than a human,
- Uses your own docs and PDFs as the single source of truth,
- Saves staff hours every week,
- But still gives your team **full control before sending**.

This is only a brief walkthrough of Building an AI Email Assistant with Lindy. If you need more help,

- Lindy provides extensive examples and resources, including a detailed walkthrough of this use cases here: [Email Responding: 101 - Lindy Academy](#)
- Stellis is here to help you focus on what matters—finding the right use cases to deliver value today. Reach out if you'd like to explore how these tools could fit your business