15.9 Klondike Co-Pilot (Your Personal Assistant)

(This plugin is sold separately)

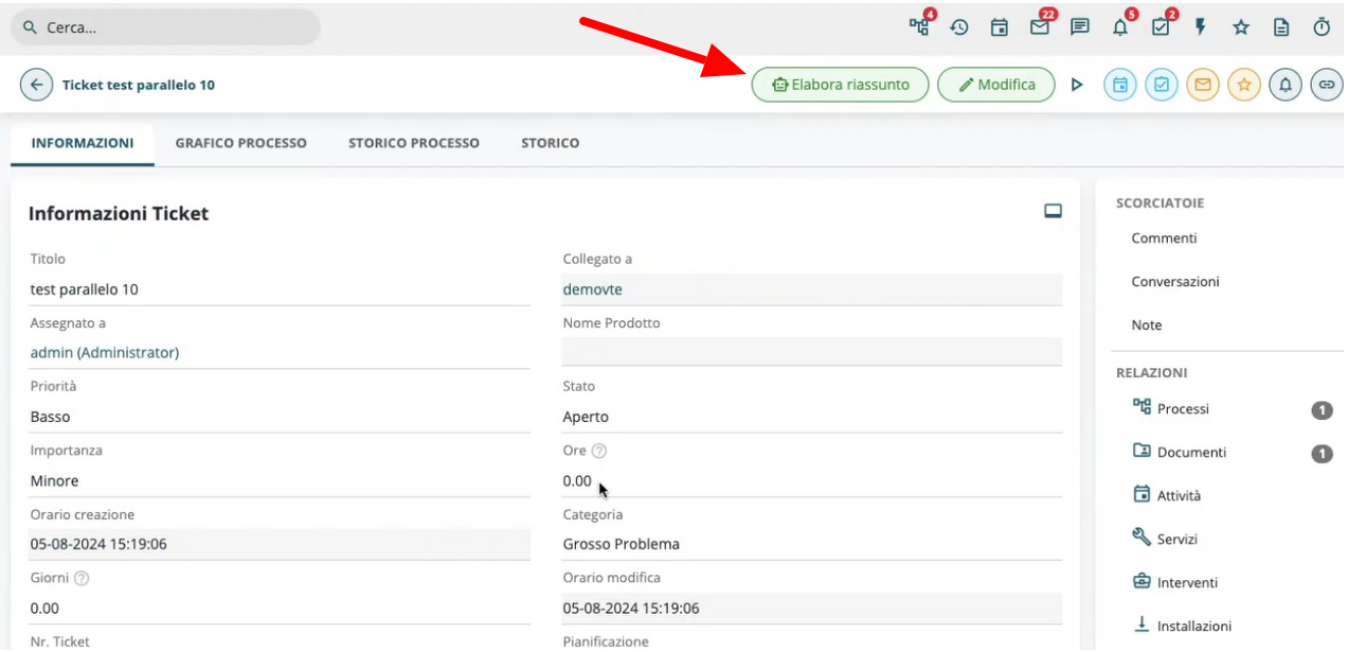
Klondike Co-Pilot is an advanced solution that enhances the capabilities of the vtenext CRM, offering automated and assisted support for managing business processes and customer interactions. This integration aims to improve operational efficiency, reduce human errors, and optimize workflow through intelligent automation and proactive assistance.

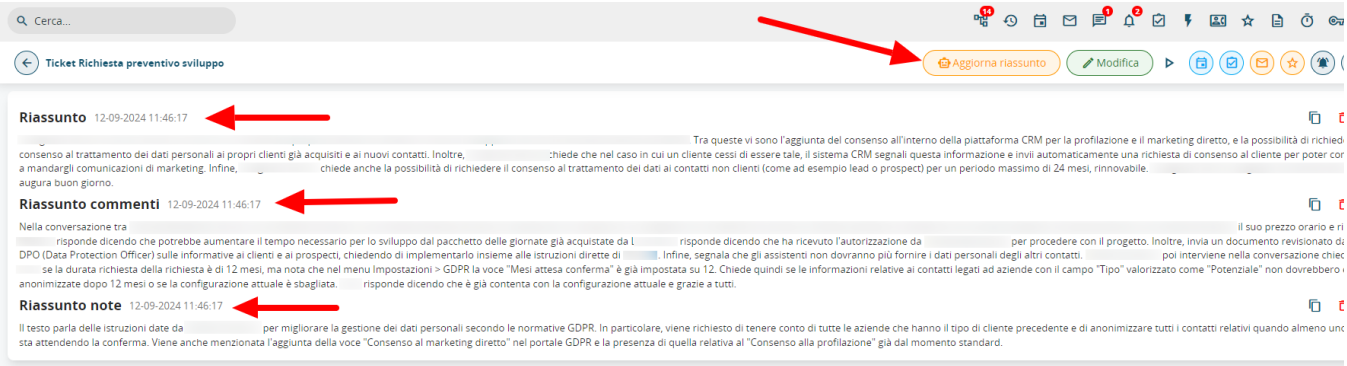
Key Features

- **Proactive Assistance**: Provides real-time suggestions while performing complex tasks, helping users make quick and informed decisions.
- **Artificial Intelligence**: Uses AI to analyze data and customer needs, optimizing responses to their requests.
- **Seamless Integration**: Integrates smoothly with vtenext and its main modules, ensuring a continuous workflow and synchronization of all shared customer information with all users.

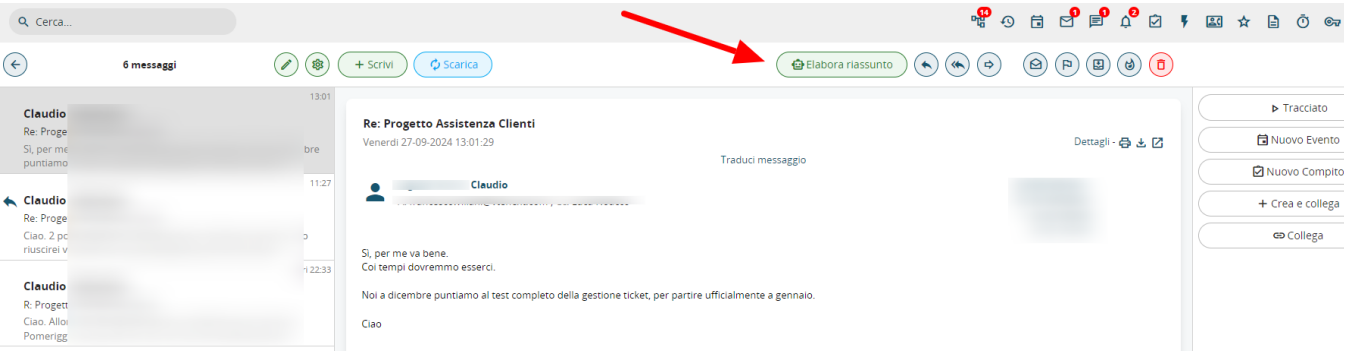
Where to Find Klondike Co-Pilot

- **Trouble Tickets**: You can request a summary within a ticket when dealing with a large amount of information represented by the ticket's DESCRIPTION, COMMENTS, and NOTES. Klondike helps by summarizing all the relevant content (with the possibility to update the summary when new details, comments, or notes are added to the ticket).

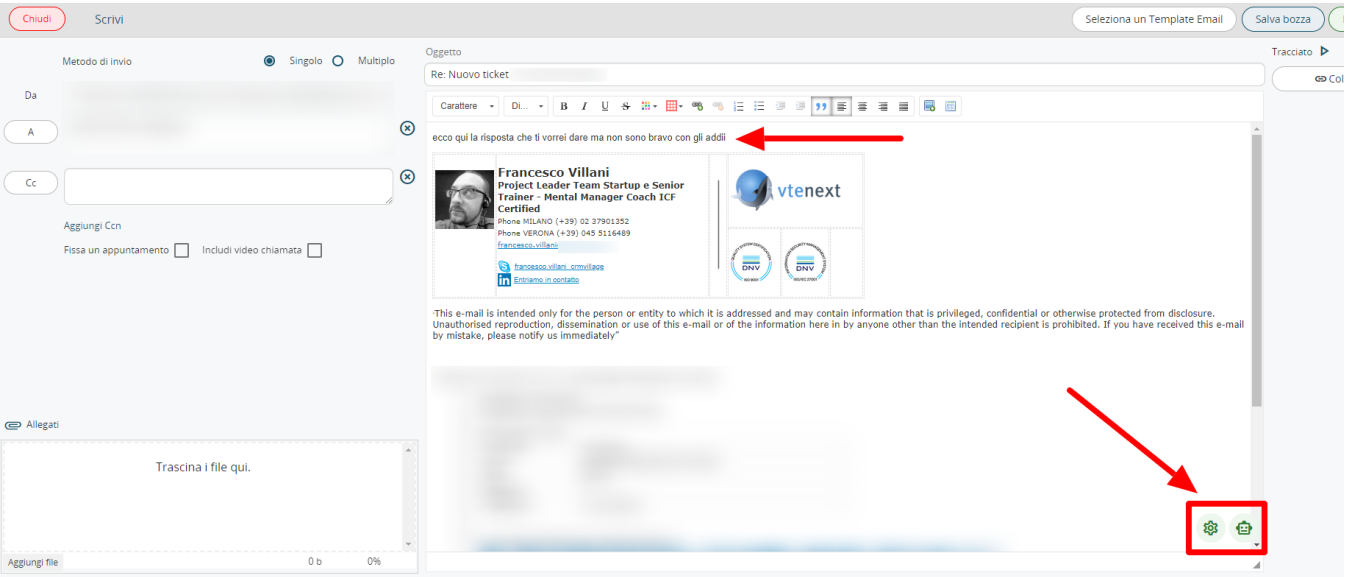




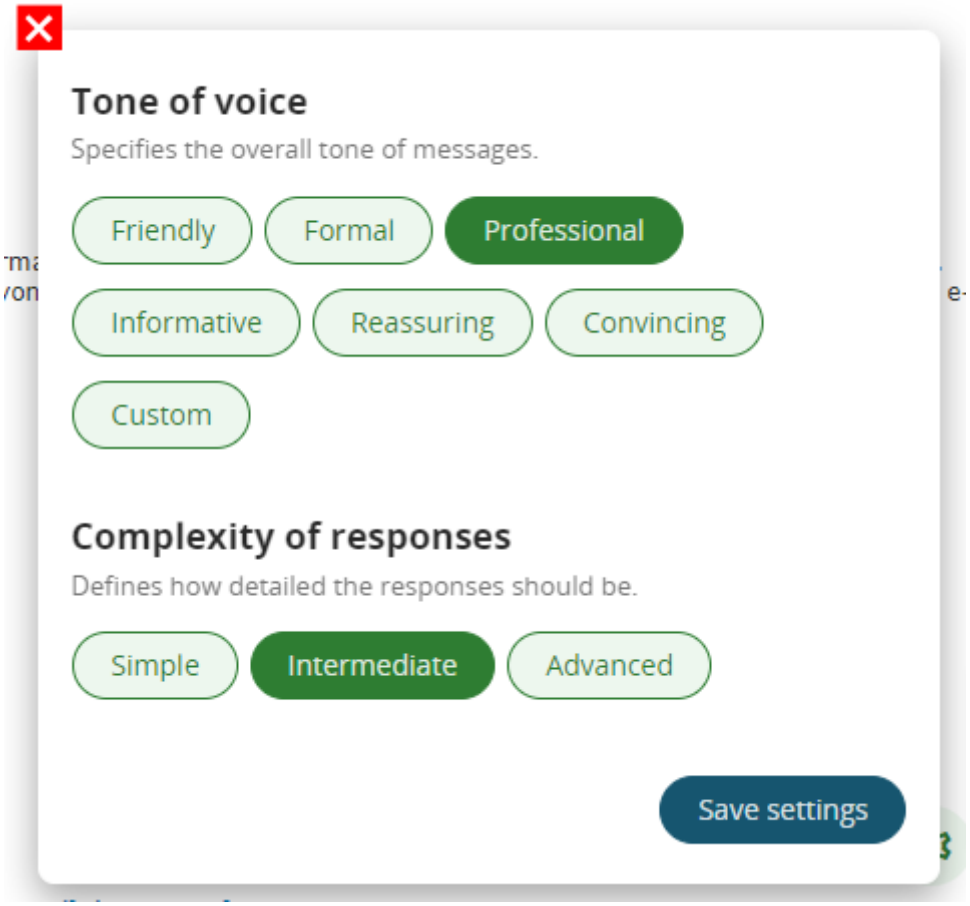
- **Messages Module**: You can request a summary of an email or a series of threads in the same email to make them easier to understand, especially when dealing with long text or multiple responses. This function is very useful when involving another user in conversations, as it allows them to grasp the essence of the entire email exchange.



Additionally, Klondike Co-Pilot can help users respond to emails by reformulating the content and constructing a coherent reply according to the chosen "character traits."

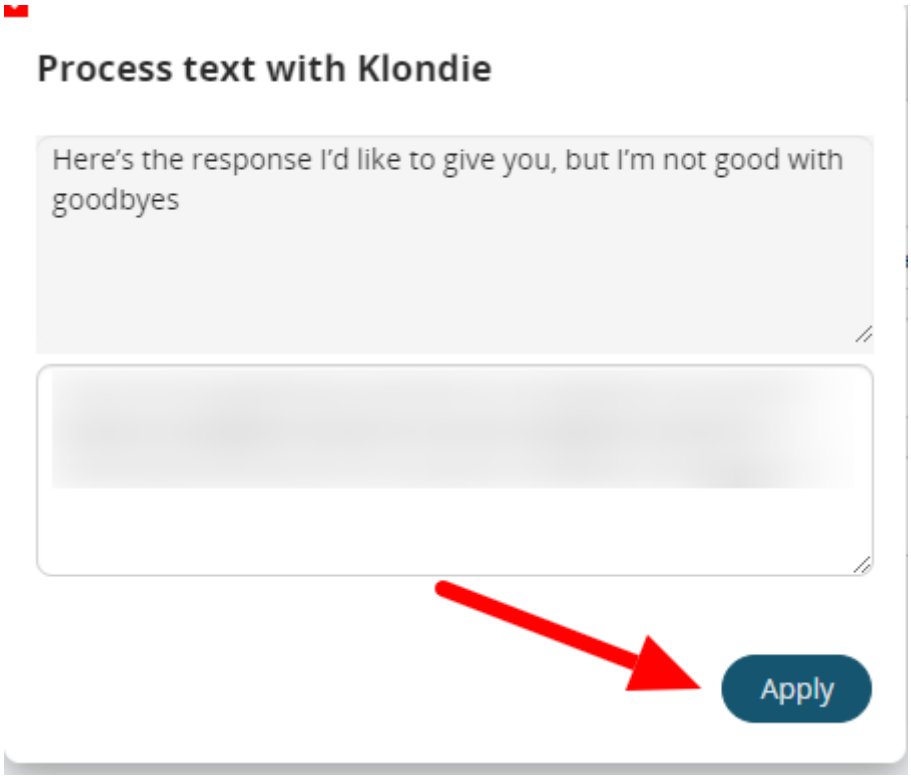


In the email composition popup, at the bottom right, there are two icons: a GEAR and a ROBOT. Clicking on the **gear** opens the "**Tone of Voice**" selection screen.



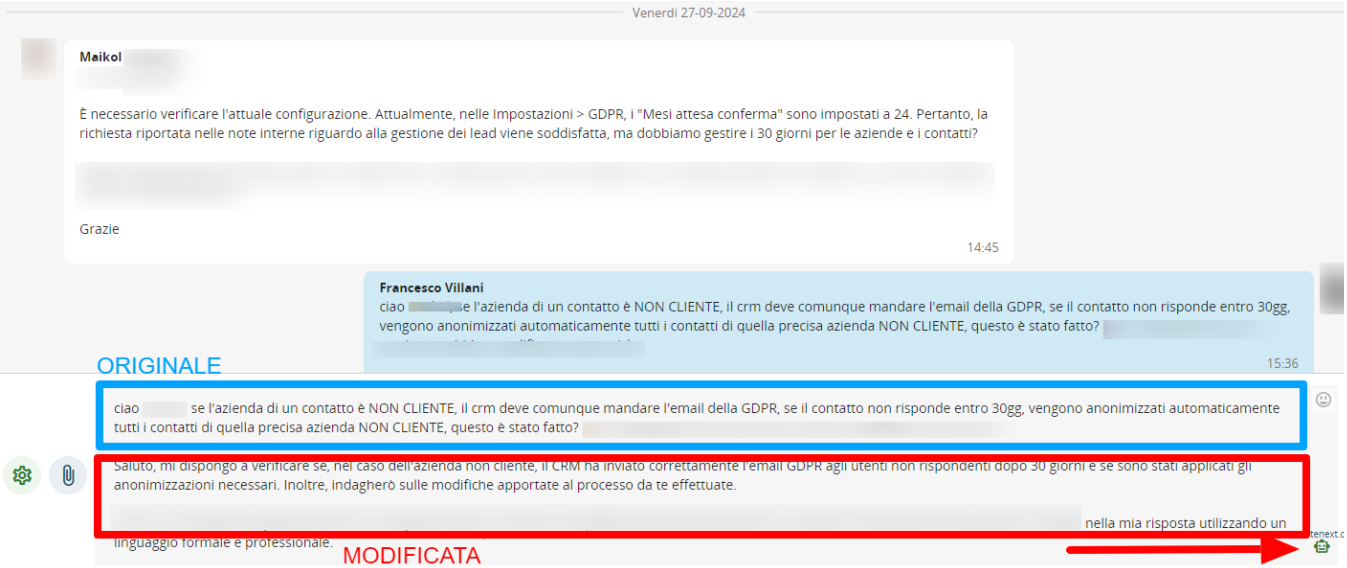
Once the selection is made and you click SAVE SETTINGS, Klondike Co-Pilot can act. To do so, simply select the text (or portion of text) you want to reformulate (after having written it) and finally click on the robot icon.

This will open a popup that will display the transliteration and reinterpretation done by Klondike, as shown below:



By clicking the APPLY button, the original text in the email body will be replaced with the one rewritten by Klondike Co-Pilot.

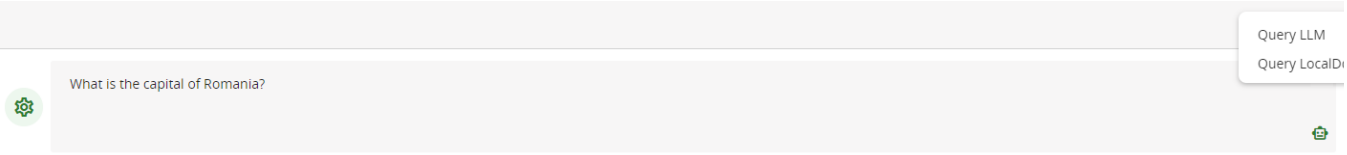
- **Conversations**: In the Conversations module, just like in the Messages module, Klondike can help respond to colleagues. You can choose a Tone of Voice, write what you intend to communicate, and let your personal assistant do the rest.

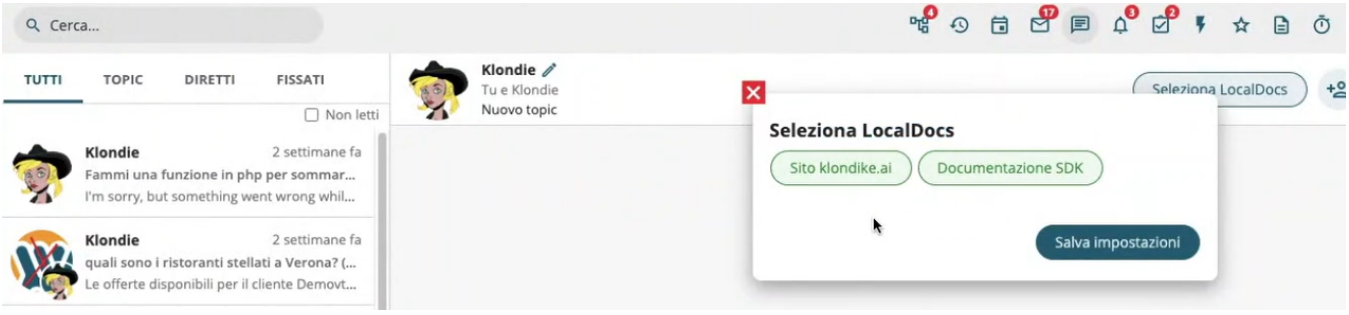


Of course, Conversations also have the summary processing feature, simplifying the reading of complex or long conversations for users.

- **Co-Pilot** From the Conversations, you can request assistance from Klondike Co-Pilot in two ways (by selecting the Klondike user, which will appear in the list of available users to chat with):

1. **General inquiries (ChatGPT-style)**
2. **Internal document inquiries (e.g., an online manual)**





In case 1, you can ask general questions, either related to or beyond the current context, for personal information or customer assistance. Essentially, you can use the conversation as if it were ChatGPT, by selecting Klondike as the user.

In case 2, you can query Klondike to search within specific documents or online manuals that it is linked to. For example, the manual you are currently reading could be connected to Klondike in vte, allowing you to search chapters or topics directly through a conversation.

Conclusion Klondike Co-Pilot for vtenext represents a significant step forward in automating customer relationship management and business processes. With its ability to automate, analyze, and provide real-time support, this tool makes vtenext even more powerful and indispensable for companies aiming for efficiency and excellence in customer service.

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