CLARUS
Communications

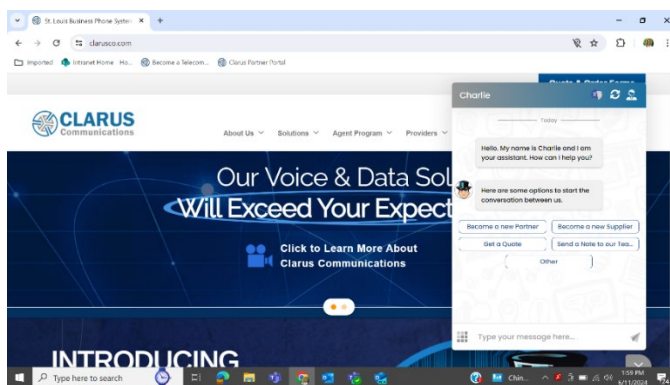# Charlie AI
User Guide

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Introduction

Welcome to the User Guide for Charlie, our state-of-the-art AI chatbot designed to assist you with all your queries related to inventory, orders, commissions, quotes, serviceability, commission rates, SPIFs, and more. This guide will be useful to both internal and external agents and customers who interact with Charlie for information and support.
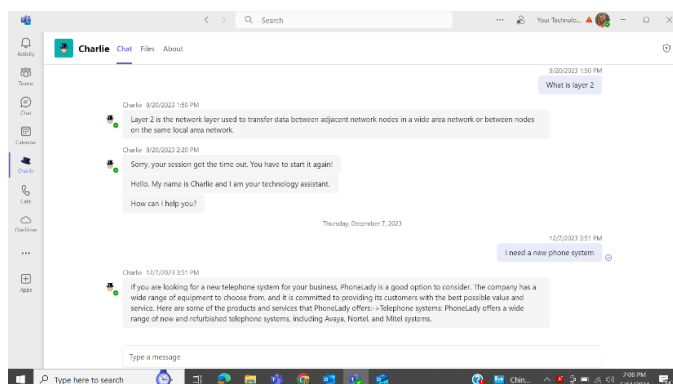
Ways to Interact with Charlie

Charlie the AI chatbot can interact with users in three different ways.

- Web Application: Charlie is located on the TDM and Clarus Communications websites.

- Teams: You will need to have the Teams application within your organization. We have the Teams application installed within our internal environment. Click on Apps on the left side of the Teams app and the Charlie app is available for download.

- SMS: Text Charlie at (703) 372-9922 to interact via SMS text messaging.

Getting Started

Charlie is available 24/7 and can assist you immediately. To start a conversation with Charlie, simply type "Hello" or "Hi Charlie" in the interface.

Keywords Explained

Orders

Status on the orders from Salesforce – order information, tracking, details, and the last date the order was updated.

Sample Command: Tell me the order status for Acme Industries

Commission Rate

Current commission rates from our Suppliers.

Sample Command: What is the commission rate for RingCentral?

Quotes

The ability to have Charlie create a quote within Salesforce for internal follow-up.

Sample Command: Create a new quote.

Serviceability

Supplier service areas and facility locations.

Sample Command: Check serviceability for (product) SD-WAN in (city, state) Bozeman, Montana.

SPIF (Sales Performance Incentive Fund)

Sales Performance Incentive Fund, a temporary bonus paid to salespeople from Suppliers.

Sample Command: Tell me about SPIF for Comcast.

Channel Manager

Appropriate contact information for the channel manager with the requested Supplier.

Sample Command: Who is the channel manager at RingCentral?

Account Manager

Appropriate contact information for the account manager for your company.

Sample Command: Who is my account manager?

Supplier Customer Service Information

Customer service information for Suppliers, including phone number, email address, website, etc.

Sample Command: What is the customer service number for RingCentral?

Inventory

Customer technology inventory information (hardware, software licenses, etc.).

Sample Command: Tell me about inventory for Acme Industries

Additional information:

You can dig deeper with choices:

- Product
- Cost
- Circuit Details
- IP Information
- Site Hardware
- POTS information
- UCaaS

Supplier Single Product and Services

Technology products and services provided by Suppliers.

Sample Command: What Supplier provides (choose a product) UCaas?

Supplier Multi Product and Services

Technology product and service bundles provided by Suppliers.

Sample Command: What Supplier provides UCaas and SDWAN?

Sales Discovery Questions

Useful sales discovery questions for working with a customer or potential customer to discover their needs.

Sample Command: What are the discovery questions for (choose product or service) network security?

Future Functionality

Request Paperwork

Obtain paperwork to submit to a client for products and/or services.

Quote Status

Status on quotes – quote information, if more information is needed, tracking, details, and the last date the quote was updated.

Commission Disputes

Provide information in a structured approach related to commissions earned versus expected to ensure fairness and resolution.