

Client AI "Sally"

- [Operation of the Chat](#)
- [Promotions](#)
- [Data](#)
- [FAQ](#)
- [Prerequisites for the Connection](#)

Operation of the Chat

With Sally, the integrated AI support, you can ask questions about Customers, Turnover and Activities directly in natural language. To a limited extent, Promotions can also be carried out.

Structure of the AI Chat

< KI CHAT

Geben Sie Ihre Frage hier ein...

1

2

3



Hallo, ich bin Sally. Womit kann ich Dir heute helfen?

Stelle Sally eine Frage zu Deinen Daten in DeDeSales. Denke daran, dass Sally eine KI ist, die Ergebnisse sind also von Dir zu prüfen.

Beispiele: Welchen Umsatz hat der Kunde K12345 in 2026 gemacht.
Gib mir eine Zusammenfassung der Aktivitäten aus den letzten 2 Wochen zum Kunden K12345.
Erstelle mir einen Chart zum Kundenumsatz aus 2026 gruppiert nach ABC Status.

1. Enter question

Enter your question or instruction in the input field.

2. Send request

Your request is transmitted to Sally via the Send button.

3. Reply area

Sally analyses the available Data and provides suitable Replies, Summaries or Evaluations and prepares Promotions. The results of the AI serve as support and should be checked before further use.

Promotions

Supported Promotions

- Create note
- Create activity

All promotions are only prepared, i.e. the corresponding form is pre-filled with the given data. For security reasons, the actual creation of the promotion must be carried out manually by the user.

Data

The AI only works with released fields in certain areas. This keeps responses faster and clearer.

Below you will find the individual areas with the corresponding queryable fields.

Area: Customers

- Customer number
- Name 1-3
- Address data (Street, ZIP code, City, Country)
- ABC status
- Last visit
- Price list
- E-mail
- Currency

Area: Products

- Item number
- Item description

Area: Contacts

- First name
- Last name
- E-mail
- Telephone
- Fax
- Mobile
- Has left the company status
- Main contact status
- Position
- (Customer number: for assigning contact to customer)

Area: Daily reports

- Day number
- ADM
- Comment
- start-km
- end-km

- Start of day date
- End of day date
- Start of day location
- End of day location
- km driven privately
- Use of private car
- Overnight stay
- No travel day
- Lunch
- Breakfast
- Dinner
- Car reg. number

Area: Visit reports

- Visit no.
- ADM
- Start of visit
- End of visit
- Customer number
- Notes
- Follow-up
- Contact ID
- Miscellaneous text

Area: Visit additional information

- ID
- ADM
- Visit no.
- Code

Area: Employees

- Agent number
- Name

Area: Activities

- Date
- Text
- Activity type
- ADM
- (Customer number: for assigning activity to customer)

Area: Document header data

- Document number
- Document type
- Document date
- Req. delivery date
- Amount
- (Customer number: for assigning document to customer)

Area: Document items

- Document number
- Document type
- Item number
- Quantity
- Sales price

Area: Opportunities

- External ID
- Name
- Created on
- Customer number
- Contact
- ADM
- Sales process
- Estimated duration
- Estimated one-off amount
- Estimated periodic amount
- Status
- Closing code
- Attribute 7

Area: Tours

- Agent number
- Customer number
- Start date
- End date
- Created on

FAQ

Red Error Messages



400 Your input exceeds the context window of this model. Please adjust your input and try again.

If you receive an error message, it is usually due to too much data being requested to read. Leave the chat window and ask the question again, but more precisely.

Reasoning

In rare cases, the AI may output its reasoning process. This cannot be prevented. In such cases, leave the chat window and start it again with the question.

Prerequisites for the Connection

After you have purchased the AI licence from DeDeNet, we establish the necessary connections between the AI and your backend.

AI Provider

You choose an AI provider (e.g. OpenAI, Anthropic, xAI or similar) and negotiate the terms for token consumption and whether automatic top-ups should occur up to a certain limit. Each question and each reply consumes one token respectively.

The AI provider issues you the corresponding API key.

Activating the Chat via the Backend

Basic configuration - Settings - AI: Chat

Enter the provider, the desired model and the API key at this point.