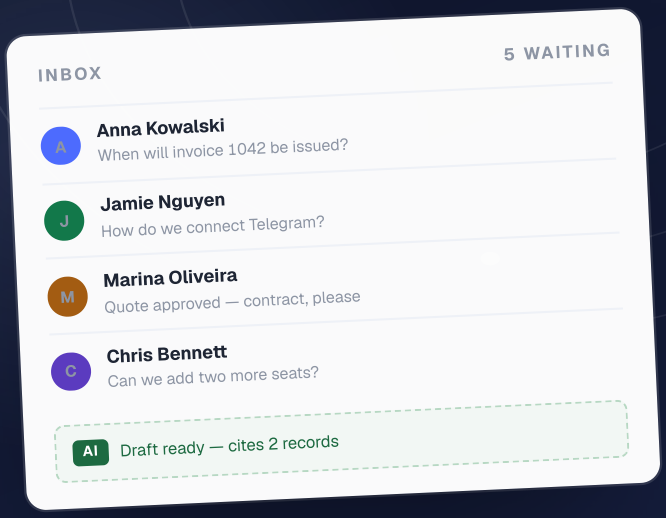
Onsites AI

PRODUCT MANUAL · EDITION 2.0

Product Manual

Six apps, one record

Chat, Mail, CRM and Docs share one customer record. Copilot drafts, Desk executes. From the first message to the signed contract, nothing is re-typed and nothing is lost between systems.



Version
Edition 2.0

Published
November 2026

Scope
Cloud · Dedicated · Self-hosted

Document ID
ONS-PM-EN-2.0

© 2026 Onsites AI · This document is regenerated with each product release; the current edition is at onsitesai.com/download.html

Contents

EDITION 2.0

01	**What this is**	Six products, one database, and what it replaces	03
02	**How it is built**	Five layers, one image, nothing to glue together	04
03	**One message, five steps**	The path from a chat to a record, and what changes at scale	05
04	**The data model**	Account, contact, opportunity, document, conversation	06
05	**Chat**	Ten channels into one queue	07
06	**Mail**	Shared inboxes and sales documents	08
07	**CRM**	Pipeline that moves itself	09
08	**Docs**	Files with sharing you can withdraw	10
09	**The AI layer**	Copilot, Harness, Agent Studio, and what each costs	11
10	**Desk**	Delegate a task, then watch it finish	12
11	**Three ways teams use it**	Export trade, agency, and light manufacturing	13
12	**Where it runs**	Cloud, dedicated cloud, self-hosted	14
13	**Security and data boundaries**	Nine controls and what the AI can read	15
14	**Plans and pricing**	Three tiers, add-ons, and one worked example	16
15	**First 90 days**	Scope, channels, real conversations, documents, AI	17
16	**Questions we get asked**	Ten answers, no marketing	18
A	**Glossary**	Fourteen terms used in this manual	19
B	**Channels, versions, support**	What ships where, and how to reach us	20

PURPOSE

Written for the people who choose, buy, and run this system: ops leads, IT, finance, and the person who will own it after launch.

PRICING BASIS

USD, billed per seat. Figures are current at publication and are superseded only by the price page and the signed order.

NOT COVERED

Custom development, network or hardware procurement, and third-party compliance audits such as SOC 2 or ISO certification.

FEEDBACK

Edition 2.0, November 2026. Corrections and questions: support@onsitesai.com.

01

THE PRODUCT

Six products that share one customer record

Most teams do not have a customer data problem. They have four systems that each hold a different part of the same customer, and a person whose job is to keep them in sync. Onsites AI removes that person's job by putting the chat, the inbox, the pipeline, and the documents on one database.

1.1 The six products

Chat

Shared inbox

Ten channels into one queue, with assignment, tags, internal notes, SLA tracking, and an AI copilot that drafts from history.

Mail

Email and documents

Shared mailboxes over IMAP/SMTP, plus quotes, orders, invoices, and contracts issued from one product catalogue.

CRM

Pipeline

Accounts, contacts, and opportunities. Conversations attach themselves to the right record instead of being pasted in.

Docs

Files

Word, Excel, PowerPoint, and text editing with granular sharing: by person, by customer, or by link with expiry.

Copilot

Writing

Draft, rewrite, change tone, translate, summarise. Runs inside the conversation, not in a separate tab.

Desk

Agent

Takes a task, plans the steps, calls tools across Chat, Mail, CRM, and Docs, and stops for approval before anything leaves.

1.2 What it replaces

What you run today	What breaks	Here
Helpdesk plus a CRM	Two records of the same customer; somebody re-keys every conversation.	One record. The conversation is part of the customer.
Shared mailbox plus spreadsheets	The quote lives in a PDF, the order in a sheet, the invoice in an accounting tool.	Quote, order, invoice, contract issued from one catalogue.
Six channels, six tabs	WhatsApp on a phone, email in a client, site chat in another widget.	One queue, one SLA clock, one history per customer.
An AI add-on bolted onto the above	It cannot see the order history, so it answers in generalities.	AI reads the same record your team reads, and cites it.

1.3 Who it fits, and who it does not

- **Fits:** teams of 3 to a few hundred whose revenue arrives through conversations — export trade, agencies, professional services, light manufacturing, B2B SaaS sales.
- **Fits:** anyone who needs the same history on a phone in a factory, in a browser in the office, and in a desktop client for long-running agent jobs.
- **Does not fit:** companies looking for a marketing-automation suite, a full ERP, or a BI platform. This is the front half of the revenue cycle, deliberately.

One sentence Everything a customer says, everything you send them, and everything you charge them for lives on one record — and the AI works on that record, not on a copy.

02

ARCHITECTURE

Five layers, one image

There is one deployable image and one database schema. No message broker to operate, no search cluster to keep in sync, no separate AI service. That is why a self-hosted install takes a day rather than a quarter, and why the same support answers apply to cloud and on-premise customers.

2.1 The layers

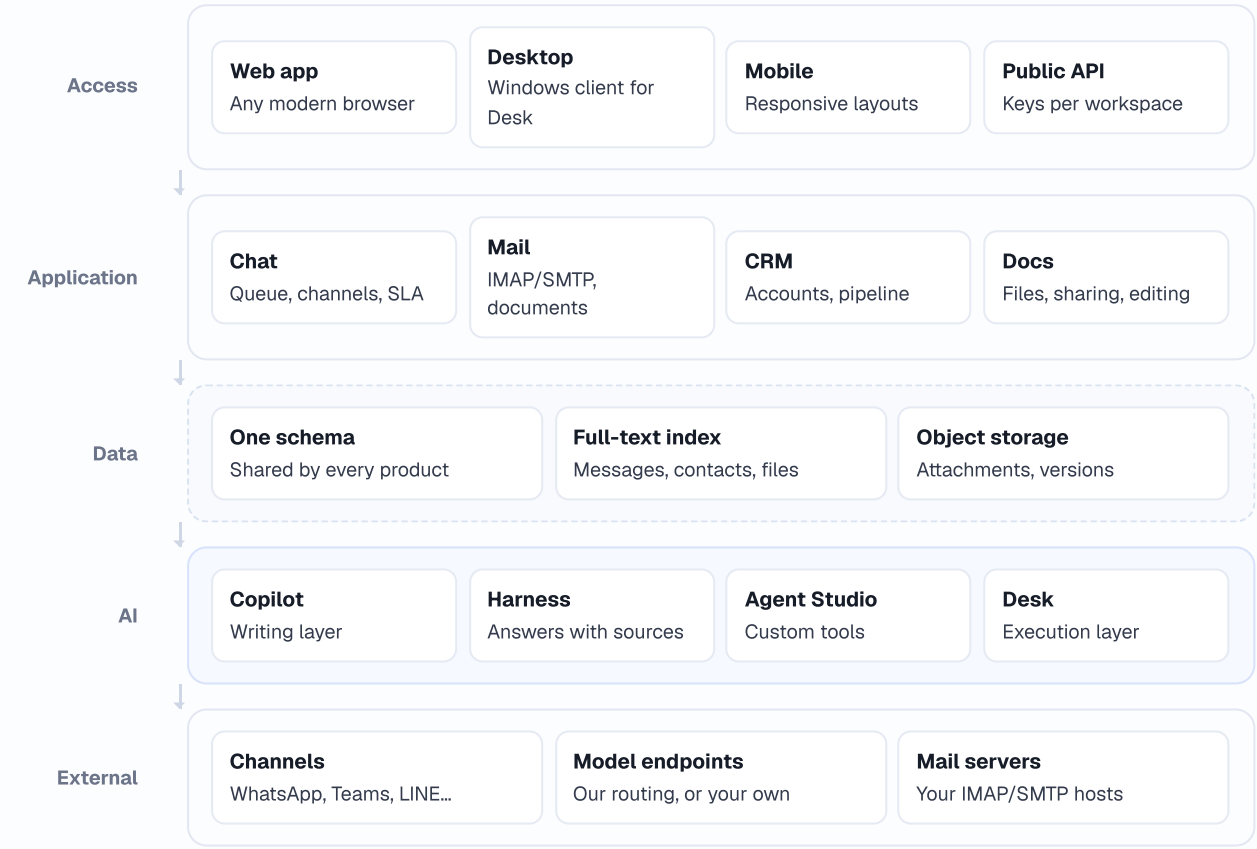


Figure 2-1 The same five layers in every deployment. Moving to self-hosted changes who supplies the bottom row, not what is above it.

2.2 Four consequences

- **Upgrades are one operation.** Application, schema, and index move together; there is no window where search lags behind the database.
- **Permissions are enforced once.** Every surface reads through the same access rules, so a file hidden from a seat is hidden from search and from the AI too.
- **Self-hosting is a deployment, not a fork.** Cloud and on-premise run the same image, which is why fixes ship to both on the same day.
- **Exports are complete.** Because there is one schema, an export is a coherent record rather than a folder of unrelated tables.

03

THE PATH OF A MESSAGE

One message, five steps

Understanding the product is easier if you follow a single inbound message. The same five steps apply whether it arrives on the website widget, WhatsApp, or email — only the adapter at the door changes.

3.1 Arrival to record

Step 01

Arrive

A channel adapter receives the message and normalises it: sender, body, attachments, channel, timestamp.

Step 02

Route

The queue applies routing: by channel, tag, language, owner, or business hours. SLA clock starts here.

Step 03

Identify

The sender is matched to an account and contact — by email, phone, or an existing thread. No match creates a new lead.

Step 04

Answer

The agent sees history, open orders, and past replies in one panel; Copilot can draft from those sources.

Step 05

Record

Resolution, tags, and any document issued are written back to the same record. Nothing is copied anywhere.

Figure 3-1 Five steps, one write path. Step 3 is where most tools lose the thread: match by email only, and the WhatsApp customer becomes a stranger.

3.2 What each step guarantees

Step	Guarantee	Why it matters
Arrive	Message stored before it is shown	A crash or a reload never loses an inbound customer message.
Route	Exactly one queue, one SLA clock	No message is answered twice, and none silently waits in a second inbox.
Identify	Identity resolved to one record	History, orders, and documents all hang off the same customer.
Answer	Drafts cite their sources	An agent can check a number before sending it instead of trusting the model.
Record	State changes are logged	Months later you can answer "who promised this, and when".

3.3 What changes at scale

Up to a few thousand conversations a month, a single instance handles everything comfortably. Beyond that, three things matter, in this order: attachment storage (move to object storage or a NAS), concurrent agent sessions (vertical scale first, then a second application node), and mailbox volume (archive older mail rather than indexing all of it). The database itself is rarely the constraint — a workspace with a million messages is still small by database standards.

> **Read-only by default** Nothing in these five steps sends anything outward. Outbound mail, agent actions, and document shares are separate, explicit operations — which is why they are the ones that require approval.

04

DATA MODEL

Five entities do the work

The schema is deliberately small. A customer is an account; people at that customer are contacts; money lives on opportunities and documents; and every conversation, file, and task hangs off one of those four. Everything else in the product is a view of this.

4.1 The entities

Entity	Holds	Links to
Account	Company, domain, owner, tier, address, tax ID	Contacts, opportunities, documents, conversations
Contact	Name, email, phone, WhatsApp, role, language	One account; conversations; assigned tasks
Opportunity	Stage, amount, currency, close date, next step	Account, contact, quoted lines, documents
Document	Quote, order, invoice, contract — with line items	Opportunity, account, source conversation
Conversation	Messages across channels, tags, SLA, participants	Contact, account, documents it produced

Tasks, notes, files, and AI runs are attachments to these five, not separate silos.

4.2 How they chain



Figure 4-1 Read left to right and you have the revenue cycle; read right to left and you have an audit trail. Both directions are supported by the same links.

4.3 Two design decisions

- **No second copy of the customer.** There is no "inbox contact" that must be promoted to a "CRM contact". One record, one history, one owner — which is also why there is no sync job to babysit.
- **Documents are generated, not attached.** A quote is produced from catalogue lines, so totals, tax, and currency are computed rather than typed; the PDF is a rendering of the record, not the record itself.

> **Why this matters for AI** An assistant is only as good as what it can see. Because the conversation, the account, and the documents are already linked, answering "has this customer paid?" does not require joining three systems — it is one query, and the answer can cite the exact invoice.

05

PRODUCT 01 · SERVICE

Chat: ten channels, one queue

Customers do not arrive from one place. The site widget, email, WhatsApp, Messenger, Telegram, Teams, LINE, WeChat, Feishu, and Discord all land in the same queue — who is waiting, for how long, what they bought before, and who answered last.

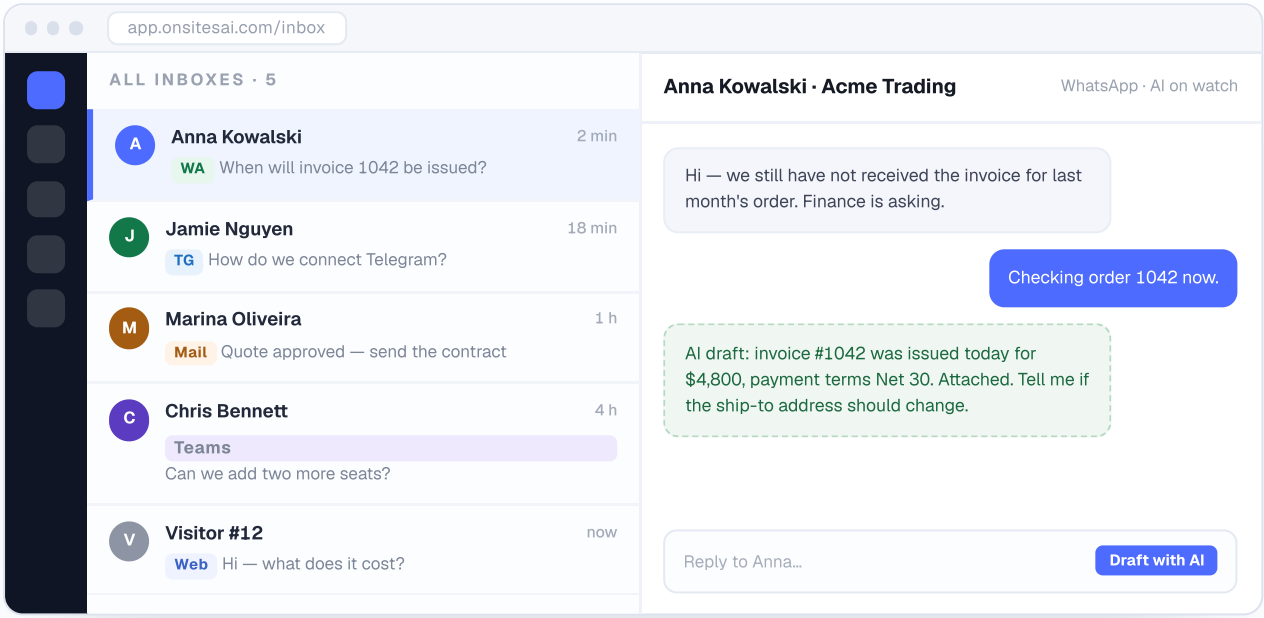


Figure 5-1 Service inbox: ten channels in one queue on the left; the customer record and an AI draft beside the thread on the right. The draft cites the order it used.

5.1 Inbox and collaboration

- **One queue, ten doors.** Group by channel, tag, owner, or priority; switching channel never means losing the customer.
- **Record always in view.** Past threads, the CRM record, open documents, and service history sit beside the conversation.
- **Built for a team.** Assignment, internal notes, SLA tracking, and keyboard shortcuts. Internal notes are never visible to the customer.
- **Visitor trail.** Source, UTM, and the pages viewed before the chat are attached to the first message.

5.2 Channels by plan

Website chat	Email	WhatsApp	Messenger
Telegram	Microsoft Teams	LINE	WeChat
Feishu	Discord		

Website chat and up to three domain mailboxes are on the free plan; the other eight channels start with Business. No per-channel fee.

5.3 Routing and SLA

Routing rules run in order and the first match wins: by channel (WhatsApp to the export desk, site chat to whoever is on first response), by language, or by business hours. The rule that caught the message is shown on the conversation, so nobody has to guess why it landed there. The SLA clock starts at arrival and can pause outside business hours.

06

PRODUCT 02 · REVENUE

Mail: from quote to invoice without leaving the thread

Email is where the money gets agreed. In most stacks that agreement then has to be re-typed into a quoting tool, an accounting system, and a CRM. Here the quote is issued from the same thread that asked for it, and the customer's reply updates the deal.

6.1 The document chain

01

Quote

Lines from the shared catalogue, currency and tax applied, validity date set. Sent as PDF.

02

Order

Accepted quote becomes an order; quantities and delivery terms locked.

03

Invoice

Issued against the order with payment terms; part-payments recorded.

04

Contract

Signature block, party details, and terms — same record, no re-typing.

Figure 6-1 Four documents, one chain. Each keeps a link back to the conversation that produced it, so "why this price?" has an answer six months later.

6.2 Shared mailboxes

- **Bring your own domains.** Connect over IMAP/SMTP; no MX changes, no migration deadline. Free plan includes three domain mailboxes, Business is unlimited (including personal domains such as Gmail).
- **Shared, not forwarded.** Several people work one mailbox without double replies; assignment and read state are visible to the team.
- **Rules that hold.** Auto-assignment, follow-up sequences, and newsletter sending with per-recipient tracking.

6.3 What a document carries

Field group	On every document
Parties	Bill-to and ship-to derived from the account; contact and address kept in sync with CRM.
Money	Currency fixed per deal; line prices from the catalogue; discounts and tax computed, not typed.
Traceability	Number, issue date, validity, source conversation, and the person who issued it.
Output	PDF for sending; the structured record stays live so totals can be re-checked or re-issued.

Credit notes and refund lines are handled the same way, so a partial return does not require a parallel spreadsheet.

> **Nothing is sent by accident** Outbound mail from an agent always passes an approval step. Drafts can be generated freely; sending is a human decision.

07

PRODUCT 03 · PIPELINE

CRM: a pipeline that fills itself

The reason CRM data goes stale is that updating it is someone's second job. Here the records are a by-product of the work: a reply moves the stage, a quote sets the amount, an invoice marks it won.

7.1 Stages and what moves them

Stage	Meaning	Moved by
New	First contact, nothing qualified	A new conversation with no matching contact
Screening	Need understood, budget unclear	Agent sets it, or a qualification question is answered
Meeting	A call or visit is booked	Calendar event or a message agreeing a time
Proposal	A quote has been issued	Issuing a quote sets the amount and the date
Customer	Order or payment received	Order confirmation or a recorded payment
Lost	Closed without order	Explicit action, with a reason required

7.2 The fields that actually get used

- **Owner and next step.** Every open deal has one owner and one date; the list of deals with no next step is the first report most teams look at.
- **Amount and currency.** Set from quoted lines rather than typed, so pipeline totals match what was actually offered.
- **Source.** Attributed from the first conversation's channel and UTM, which is the only attribution most SMB teams can keep honest.
- **Contact role.** Decision-maker flag and buying role, used to warn when a deal is single-threaded.

7.3 Reporting without a data team

Four views cover most of what a sales lead needs: pipeline by stage (value and count), deals closing this month, deals with no activity in fourteen days, and win rate by source. Because conversations and documents are on the same record, each figure can be opened down to the message that produced it — which is the difference between a dashboard people trust and one they argue about.

> **One rule** If a field cannot be filled as a side effect of work someone is already doing, it will be empty within a quarter. The six fields above are the ones that stay filled.

08

PRODUCT 04 · FILES

Docs: sharing you can take back

Files are where most "who still has this?" conversations happen. Docs keeps the document, the share, and the customer link together — and lets you withdraw a link that was sent to the wrong person.

8.1 Editing

- **Real formats.** Word, Excel, PowerPoint, and plain text open and edit in the browser without conversion loss.
- **Live collaboration.** Multiple cursors, comments, and version history; a document can be restored to any earlier version.
- **Attached to the record.** Anything created from a conversation stays linked to that customer and that deal.

8.2 Sharing controls

Control	Options	Notes
Audience	Private, team, one person, or public link	A public link is off by default; it is a deliberate act, not a setting someone inherits.
Expiry	A date, or a number of days	Useful for quotes and samples that should not circulate after the deal closes.
Open limit	Allowed number of openings	For price lists and tender documents shared with a named buyer.
Revoke	Immediate	Killing the link beats asking someone to delete a file.
Download	Allow or block	View-only for documents that may be read but should not be re-shared.

8.3 Where files live

On cloud and dedicated-cloud plans, files sit in object storage in the region the workspace was created in. On self-hosted installs they sit on your disk or NAS, and the workspace never reaches outward to fetch them. Either way the access rules are the same, and a file hidden from a seat is hidden from search and from the AI as well.

> **Practical habit** Share by customer or by named person rather than "anyone with the link" — then revoking access when a contract ends is one action, not a file-by-file audit.

09

THE AI LAYER

Four AI products, priced by the action

AI is not a separate product with a separate login. It is four capabilities inside the same workspace, each with a different job and a different cost — so you can turn on the cheap one, measure it for a fortnight, and decide about the rest.

9.1 The four

Writing

Copilot

Draft, rewrite, change tone, translate, summarise. 3–6 points per action.

Answers

Harness

Answers from CRM, docs, and past threads — with the sources shown.

Tools

Agent Studio

Your own tools and prompts, exposed to the agent with the same permissions.

Execution

Desk

Takes a task, plans it, calls tools, and stops for approval before sending.

9.2 What it costs

Action	Points	Note
Copilot draft	3	Short reply, rewrite, or tone change.
Reply suggestion	6	Drafted from the thread with record context.
Translation	3	Per message, both directions.
Harness answer	15	24 when it needs to call a tool.
Desk step	15	24 with tools; failed operations are not billed.

Points are prepaid and never expire: $25 for 2,500, $50 for 5,000, $100 for 10,000 — about $0.009 to $0.008 per point.

9.3 Guardrails

- **Reads only this workspace.** No cross-workspace retrieval, ever, in any deployment.
- **Cites what it used.** If a claim cannot be traced to a record, it is not written into the answer.
- **Not used for training.** Customer data does not train shared or public models; self-hosted keeps the model endpoint inside your network.
- **Switchable off.** AI can be disabled per workspace or per member; the rest of the product keeps working.

Soft limit by default A workspace starts with a soft spending cap: you are warned as the balance runs low, work continues. Turn it into a hard cap and AI pauses at the threshold while everything else carries on.

10

PRODUCT 06 · AI EXECUTION

Desk: hand over a task, watch it finish

Copilot answers "how should I word this". Desk answers "get it done". It plans the steps, calls tools across the workspace, and records each one — but its operating objects are customers, documents, and records, not a code repository.

10.1 The five stages of a task

01 Intake	02 Plan	03 Approve	04 Execute	05 Audit
Natural language	**Steps you can read**	**Ask before acting**	**Across products**	**Everything logged**
"Chase every overdue invoice", "draft a reply to Anna", "where is invoice 1042" — all accepted as written.	Records to read, tools to call, fields to write — shown as a plan before anything runs.	Reads are autonomous; sends, deletions, and edits need a human yes, per step.	Posts a message in Chat, issues a document in Mail, changes a stage in CRM, saves to Docs.	What it read, wrote, and spent. Replayable later, exportable with the rest of the data.

Figure 10-1 The execution loop. Approval is structural, not a setting: without a human confirmation, nothing leaves the workspace.

10.2 What to hand it

Type of work	Example
Batch lookup and tidying	"List every deal quoted but not closed", "which threads mentioned delivery dates"
Work that spans records	"Email each overdue invoice's owner", "sync this contract's status to the pipeline"
Fixed playbooks	"When a new lead arrives, check for history, tag if returning, and assign the right owner"

10.3 Where it stops

Boundary one

Never bypasses approval

Any outbound send, deletion, or state change waits for a person. The audit log answers "who approved this".

Boundary two

Never leaves the workspace

Reach is limited by seat permissions and connected tools; a system it cannot reach is a system it cannot change.

10.4 Desktop and cloud

Item	Detail	Note
Desktop client	Windows 10 / 11	Version 0.1.14, 276 MB installer, SHA-256 published
Browser	No install needed	Best for Chat, Mail, and everyday Docs work
Long jobs	Desktop keeps running	Suited to tasks that outlive a browser tab
Data	Stays in the deployment	The client is a local shell; there is no second copy

Cost is per call Desk bills by actual tool calls, not by seat. A simple lookup usually lands in the low tens of points — start with a soft cap and watch it for two weeks.

11

IN PRACTICE

Three teams, three breakages

The product is the same in all three cases. What differs is which step of the revenue cycle is currently falling apart — and that is usually where the value shows up first.

11.1 Export trade: the quote that takes three days

Where it breaks

Quotes are hand-built

A buyer asks on WhatsApp for prices on six SKUs; someone opens last quarter's spreadsheet, checks prices with the factory, re-types lines into a PDF, and mails it. Three days pass; the buyer has already ordered elsewhere.

Where it fixes

Quote from the same thread

Catalogue lines and currency are already there; the quote is issued in the conversation, the buyer's reply moves it to order, and the invoice follows the same record.

- **WhatsApp and email land in one queue,** so the buyer's follow-up on a different channel is still the same thread.
- **Currency is fixed per deal,** which removes the most common quoting error in export sales.
- **Copilot drafts the reply in the buyer's language,** and the draft carries the price and terms from the quote rather than from memory.

11.2 Agency: the brief that lives in four inboxes

Where it breaks

Client context is fragmented

The brief is in email, approvals are on WhatsApp, files are in a shared drive, and the retainer is tracked in a sheet. Junior staff cannot find the last decision without asking a senior.

Where it fixes

One record per client

Conversation, files, and retainer sit on the account; Harness answers "what did we agree about the logo?" with a citation to the message.

- **Docs version history** turns "final_v7" into a dated trail with who changed what.
- **Internal notes** keep the client-facing thread clean while the team discusses it.
- **Desk** handles the recurring admin — collecting approvals, filing deliverables, updating the retainer status.

11.3 Light manufacturing: the order nobody can trace

Where it breaks

Same order, four numbers

The customer's PO number, the internal order, the invoice, and the shipping reference do not match, so every status question becomes an investigation.

Where it fixes

One chain, one reference

Quote → order → invoice keeps its own number and holds the customer's PO as a field; a status question resolves to one record.

- **Fewer seats, deeper records:** the free plan's three seats are enough to pilot the office side before rolling out to the floor.
- **Self-hosted** when the plant network is isolated — same product, offline upgrade.

If none of these is you Start with the free plan and one channel. The failure that costs the most is usually visible within the first week — it will be the step you keep apologising for.

12

DEPLOYMENT

Three places to run it

Same software, three operating models. Choose by asking one question: can this data leave the network? If yes, take cloud and be live in fifteen seconds. If not, self-host and be live in a day.

12.1 The three

Cloud

Shared infrastructure

Provisioned in 15 seconds. Billed per seat, monthly or annually. Backups and upgrades included.

Dedicated cloud

Your own instance

Isolated instance on our infrastructure, region chosen at provisioning. Minimum 10 seats; we still run it.

Self-hosted

Your machines

Installed by us on your VM or private cloud. Can run fully offline; you supply model endpoint and storage.

12.2 Self-hosted shape

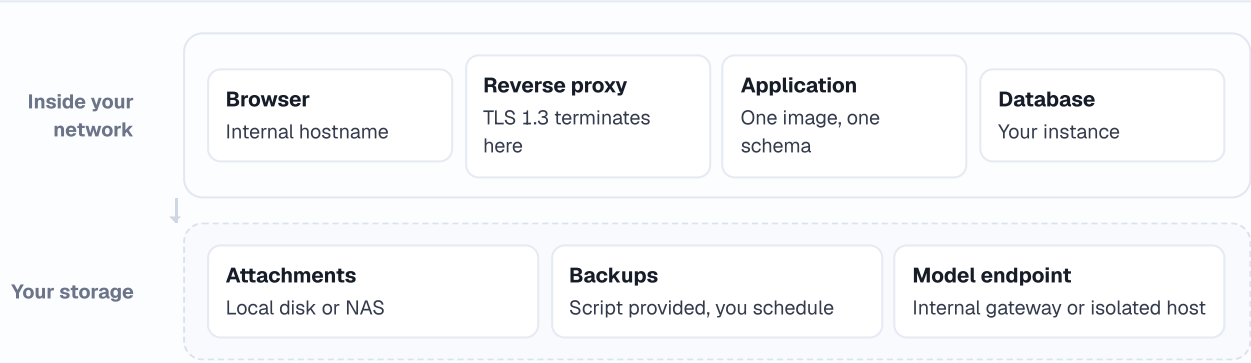


Figure 12-1 Self-hosted topology. The only outbound dependency is the model endpoint, and that can be internal too.

12.3 Choosing

Question	Cloud / dedicated	Self-hosted
Data may leave?	Required	Not allowed
Go-live	15 seconds	About 24 hours, installed by us
Who patches	We do	We supply packages; you apply them
AI and storage	Bought as add-ons	Yours; we charge nothing for either
Offline	Not possible	**Fully offline, including upgrades**

Dedicated cloud is the middle case: isolated instance and region choice, but no server to operate.

Migration between them Cloud to self-hosted is an export and an import; numbering, audit history, and document links survive. We do the migration as part of the install fee.

13

SECURITY

Nine controls, written plainly

Security pages age badly when they are full of adjectives. These nine are concrete enough to be checked in a questionnaire, and each one has an owner — us, or you, depending on where the software runs.

13.1 The nine

#	Control	What it means
1	**Transport**	TLS 1.3 for every connection. On self-hosted, TLS terminates at your own proxy with your certificate.
2	**Encryption at rest**	Storage encrypted on our infrastructure; on your disks, handled by your OS or storage layer.
3	**Key management**	Keys stored separately from data; platform staff only. Self-hosted keeps the keys with you.
4	**Seat permissions**	Access by seat and role; any role can be narrowed to read-only.
5	**Workspace isolation**	Workspaces cannot see each other. The AI inherits the same boundary.
6	**Share control**	Private by default; links can carry an expiry and an open limit, and can be revoked.
7	**Audit trail**	State changes record who, when, and what changed; exportable with the data.
8	**Backup and export**	Paid cloud workspaces back up automatically; you can export everything at any time.
9	**AI data boundary**	Reads only this workspace; no training on customer data; sources shown on every answer.

13.2 What the AI can reach

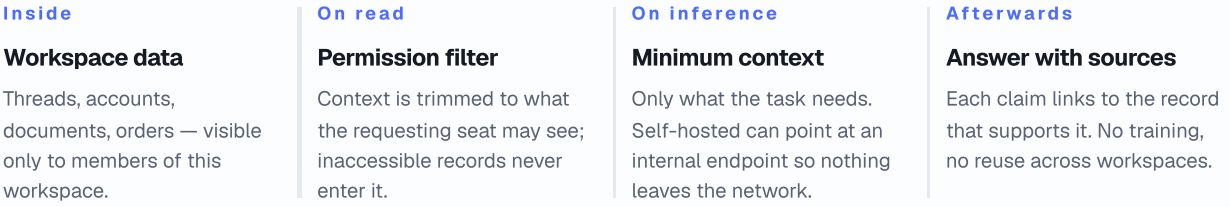


Figure 13-1 Four points where data could leak, and what stops it at each. Remove any one and the boundary no longer holds.

Full detail The security and data-residency whitepaper covers processor roles, residency options, backup retention, deletion timelines, and the disclosure process — six pages, downloadable from the same page as this manual.

14

PRICING

Three tiers, and what they actually include

Seats do not carry channels in this pricing model: a plan decides the channels, the storage, and the isolation, and every seat on that plan gets all of it. That is why a 10-seat team can budget without counting widgets.

14.1 Plans

Item	Free	Business $15	Dedicated $20
Price	$0	$15 / seat / month $180 / seat / year	$20 / seat / month $240 / seat / year
Seats	Up to 3	From 1	Minimum 10
Channels	Website chat only	**All ten**	**All ten**
Mailboxes	3 domain addresses	Unlimited	Unlimited
Storage	100 MB	5 GB / seat	10 GB / seat, 1 TB cap
Instance	Shared	Shared	**Dedicated, region choice**
Watermark	Yes	**Removed**	**Removed**

14.2 Per seat, per year

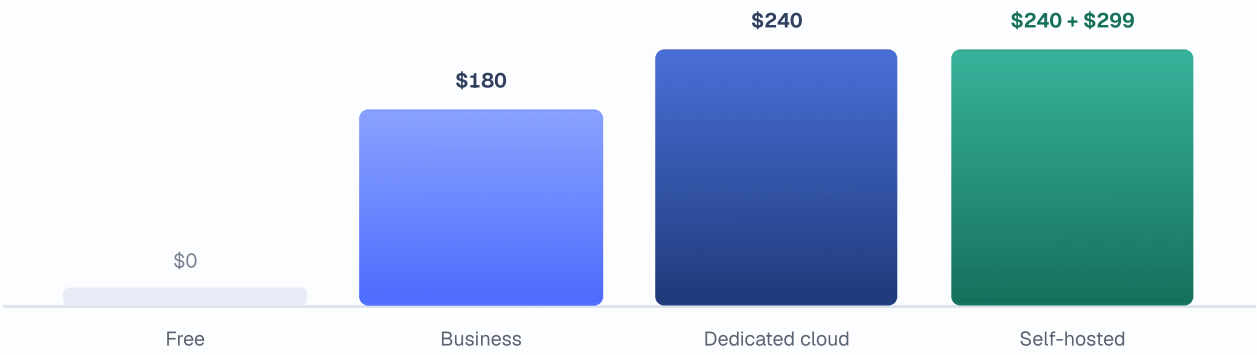


Figure 14-1 Annual cost per seat. Self-hosted matches dedicated cloud per seat; the $299 install is one-time, and you supply model and storage, so there are no AI or storage fees.

14.3 A ten-person team, first year

Business: 10 seats × $180 = **$1,800** per year, all channels, 50 GB included. Dedicated cloud: 10 × $240 = **$2,400** per year. Self-hosted: same $2,400 plus $299 once, and no AI or storage fees because you provide both. Add storage at $1/GB/month in 10, 50, 100, or 500 GB packs if attachments grow; add AI points from $25 as usage appears.

> **How to read the numbers** The floor for dedicated and self-hosted is ten seats — below that, Business is cheaper per seat and the isolation is not worth the premium. Above roughly forty seats, the dedicated instance starts to pay for itself in predictable performance.

15

ROLLOUT

First 90 days, in four moves

Rollouts fail for social reasons, not technical ones: too many channels on day one, a CRM nobody was told to use, and an AI switched on before anyone trusts it. The sequence below is ordered to earn trust before it asks for it.

15.1 The plan

Days 1–7

Scope

Seats, channels, deployment. One entry point and one response-time target agreed in writing.

Week 2–4

Channels and data

Website chat and the main mailbox first. Import contacts and accounts; set tags and routing.

Week 5–8

Real conversations

Shared drafts and internal notes while the team finds its feet. Publish the SLA; start the satisfaction question.

Week 9–13

Documents and AI

Move quotes, orders, and invoices onto the record; then turn on Copilot, and evaluate Harness and Desk with a points budget.

Figure 15-1 Thirteen weeks from decision to a working revenue cycle. The AI stage is last on purpose: by then the records it reads are trustworthy.

15.2 Migration checklist

Bring	Format	Watch out for
Contacts and accounts	CSV, or from the old tool	Duplicate companies with different domains; fix before import, not after.
Conversations	Provider export	Timestamps are preserved; attachments may need re-linking.
Documents	PDF and Office files	Old quotes become files, not structured records — that is expected.
Product catalogue	CSV with SKU, price, currency	Get currencies right once; a deal's currency cannot be changed later.

15.3 Three failure modes to avoid

- **Connecting all ten channels at once.** Start with two; every channel multiplies the routing rules you have to debug.
- **Importing a dirty contact list.** The first impression of any CRM is the state of its data on day one.
- **Turning on the agent before the team trusts the records.** Desk is only as good as the data it plans against; give it four weeks of clean history first.

16

FAQ

Ten questions, answered plainly

These are the ones that come up in almost every evaluation. Where the answer is "no", it says no.

Q Do we need to change our email provider?

No. We connect over IMAP/SMTP to the mailboxes you already have, including Google Workspace and Microsoft 365. Your MX records stay where they are.

Q Can we keep using WhatsApp Business and our own number?

Yes. WhatsApp connects as a channel; the number and the Business account remain yours. Telegram works with both personal accounts and bots.

Q What happens if we stop paying?

The workspace becomes read-only rather than deleted. You can export everything, and data is retained for the period stated in your order before deletion.

Q Is the AI trained on our data?

No. It reads only your workspace and is never used to train shared or public models. Self-hosted deployments can keep the model endpoint inside your network.

Q How accurate is the AI at quoting prices?

When it reads a quote or catalogue line it repeats that figure and cites it. When no record supports an answer it says so instead of estimating — that behaviour is deliberate.

Q Can we restrict what each seat sees?

Yes. Seats carry roles, roles can be narrowed to read-only, and workspaces are isolated from each other. Access is revoked the moment a seat is removed.

Q Does it work on a phone?

Yes — the web app is responsive for Chat, Mail, CRM, and Docs. Long-running Desk jobs are better on the Windows client.

Q What about our existing CRM data?

Contacts, accounts, and deals import from CSV or a standard export. Conversations and documents come across as history; older quotes become files rather than structured records.

Q How long does self-hosted take?

Assessment first, then roughly 24 hours of installation and migration by us. A 60-day pilot runs before you commit to licences.

Q Is there a minimum contract?

Monthly or annual, per seat. Annual is cheaper per seat. Dedicated cloud and self-hosted start at ten seats.

Not answered here? support@onsitesai.com — we reply within one business day, and we answer with the actual configuration rather than a brochure.

A

APPENDIX A

Glossary

Terms as they are used in this manual. Where a word has a common meaning and a product meaning, the product meaning is the one below.

Term	Meaning here
Seat	One account that can sign in and handle conversations. Billed per seat, monthly or annually.
Workspace	An isolated set of users, data, and settings. Workspaces cannot see each other.
Channel	An inbound path — website chat, email, WhatsApp, Messenger, Telegram, Teams, LINE, WeChat, Feishu, Discord.
Queue	The shared inbox view: all conversations waiting for a person, grouped by the rules you set.
SLA	Response-time target attached to a conversation; the clock starts at arrival.
Account	The company you are selling to. Contacts, deals, documents, and conversations hang off it.
Opportunity	A deal in progress: stage, amount, currency, next follow-up.
Document	Quote, order, invoice, or contract issued from catalogue lines rather than typed by hand.
Catalogue	The shared product list with SKU, unit, and price; documents draw their lines from it.
Points	Prepaid AI credits. 2,500 points cost $25; they never expire.
Copilot	The writing layer: draft, rewrite, tone, translate, summarise.
Harness	The answering layer: retrieval across records and files, with sources shown.
Desk	The execution layer: plans a task, calls tools, asks for approval, logs what it did.
Dedicated cloud	An isolated instance on our infrastructure, region chosen at provisioning, minimum ten seats.
Self-hosted	Installed on customer infrastructure; can run fully offline, with customer-supplied model and storage.

Units Storage is quoted in GB (decimal) per seat; mailboxes are counts, not storage. Prices are USD; a deal keeps the currency it was created in for its whole life.

B

APPENDIX B

Channels, versions, and how to reach us

B.1 Channels

Channel	Free plan	Notes
Website chat	**Included**	Widget snippet; visitor trail with source and UTM.
Email (domain mailboxes)	Up to 3	IMAP/SMTP, no MX change required.
WhatsApp	Business only	Personal number or Business account.
Messenger	Business only	Page-level connection.
Telegram	Business only	Personal accounts and bots.
Microsoft Teams	Business only	Channel connection per team.
LINE	Business only	Official account.
WeChat (customer service)	Business only	Service account connection.
Feishu / Lark	Business only	App connection.
Discord	Business only	Server and channel mapping.

No per-channel charge on any plan. Connectors are updated with the platform, not separately versioned.

B.2 Versions in this edition

Component	Version	Note
Platform	2.0	Edition 2.0 of this manual describes this release.
Desk desktop	0.1.14	Windows 10 / 11, 276 MB installer, SHA-256 published.
Self-hosted image	2.0	Linux, Windows, macOS hosts; offline upgrade packages.
Public API	v1	Per-workspace keys; documented endpoints for records and documents.

B.3 Support

- **Email:** support@onsitesai.com — replies within one business day; security reports go to the same address and are acknowledged the same day.
- **In-product:** the chat widget on this site reaches the same team during business hours.
- **Self-hosted:** a dedicated channel is provisioned at install, with the escalation path for your environment.
- **Documentation:** product docs, release notes, and this manual are at onsitesai.com/download.html.

> **Document set** This manual (21 pages), the self-hosted deployment guide (6 pages), and the security and data-residency whitepaper (6 pages) are written to be read together; the numbers in all three come from the same release.

Onsites AI

The whole customer relationship, in one workspace.

Chat, Mail, CRM, Docs, Copilot and Desk on one record. Start free with three seats — no card, no call.

onsitesai.com/start

onsitesai.com/self-host

© 2026 Onsites AI · ONS-PM-EN-2.0

support@onsitesai.com