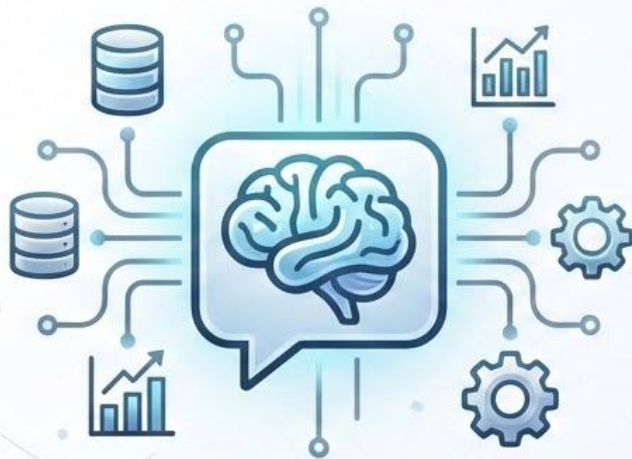


INTRODUCING

Claricore AI Chat+

What is AI Chat+



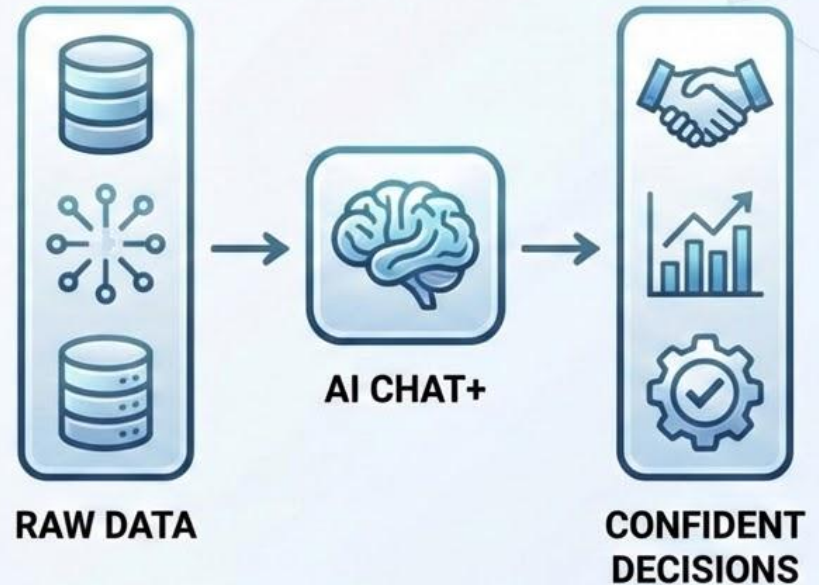
AI Chat+ is Claricore's **custom AI chat for business data**. It is designed so a company can ask plain-English questions about its own business and **get fast, relevant answers** instead of digging through reports, dashboards, and disconnected systems.

Claricore positions it as a **business assistant for revenue, customers, operations, and workflow bottlenecks**, with responses that go beyond summaries **into recommended next steps**

Business Use Case

The core promise is to help teams move from **raw business data** to **confident decisions faster**. AI Chat+ gives teams **instant business answers**, **fast summaries**, and **practical next steps**, while also improving **leadership visibility** into trends, risks, and priorities.

Not generic chat responses: it identifies a specific business issue, explains what needs attention, and recommends immediate actions.



Claricore AI Chat+

ask data questions instantly

unify scattered data context

improve forecast confidence

tailor prompts, retrieval, access controls, and integrations to your business' data model



unify scattered
data context



improve
forecast
confidence



tailor prompts, retrieval,
access controls, and
integrations to your
business' data model



Main features

1. Natural-language business Q&A

Users can ask direct questions in normal language, such as where the business is losing time, what needs attention this month, or how a metric changed. Claricore explicitly describes AI Chat+ as an **AI business chat** that answers questions about **revenue, customers, operations, and workflow bottlenecks**.





2. Instant answers and summaries

The product is built to shorten analysis time. AI Chat+ provides **instant business answers** and **fast summaries**, “3x faster analysis workflows.” The product's value is reducing time spent searching across reports and tools.



3. Action-focused recommendations

A key differentiator is that AI Chat+ does not just return information. AI Chat+ **turns business data into practical suggestions** that teams can use right away. The assistant recommends routing support tickets, prioritizing high-value customers, and reviewing issue-type volume, which shows the intended output is **decision support plus next-best-action guidance**.



4. Built for leadership visibility

AI Chat+ is **built for leadership visibility**, meaning executives and managers can **quickly understand trends, risks, and priorities** without waiting for manual analysis. This fits the broader Claricore positioning around **clearer visibility, confident decisions, and connected execution**.



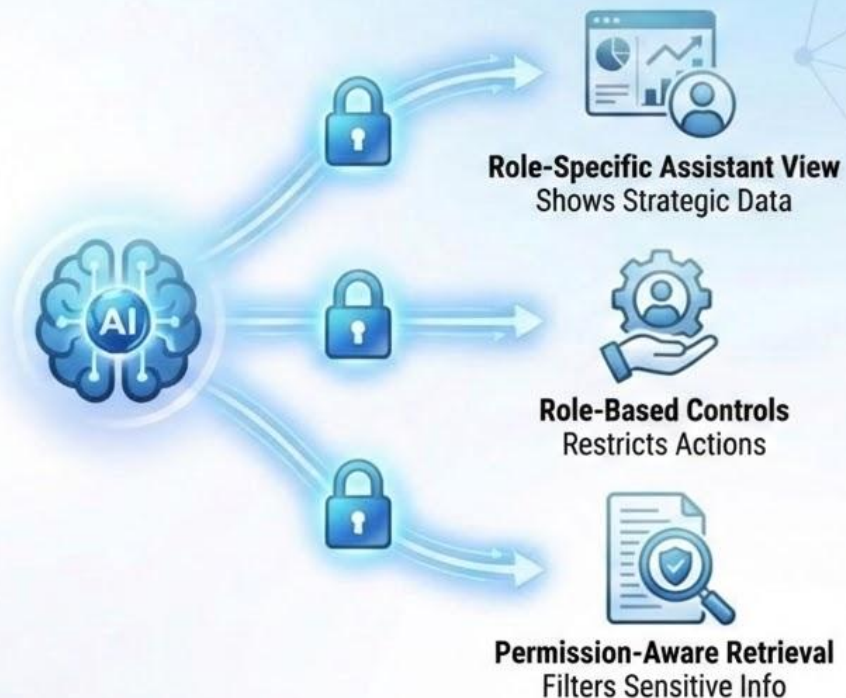
5. Connected business context

AI Chat+ works across **scattered systems and datasets**, bringing them together into one clearer view of operations, customers, growth, and performance. Governed foundation, **customers, growth, and performance**. Related Claricore pages describe this as a governed foundation connecting **structured and unstructured data**, dashboards, business documents, and operational systems.



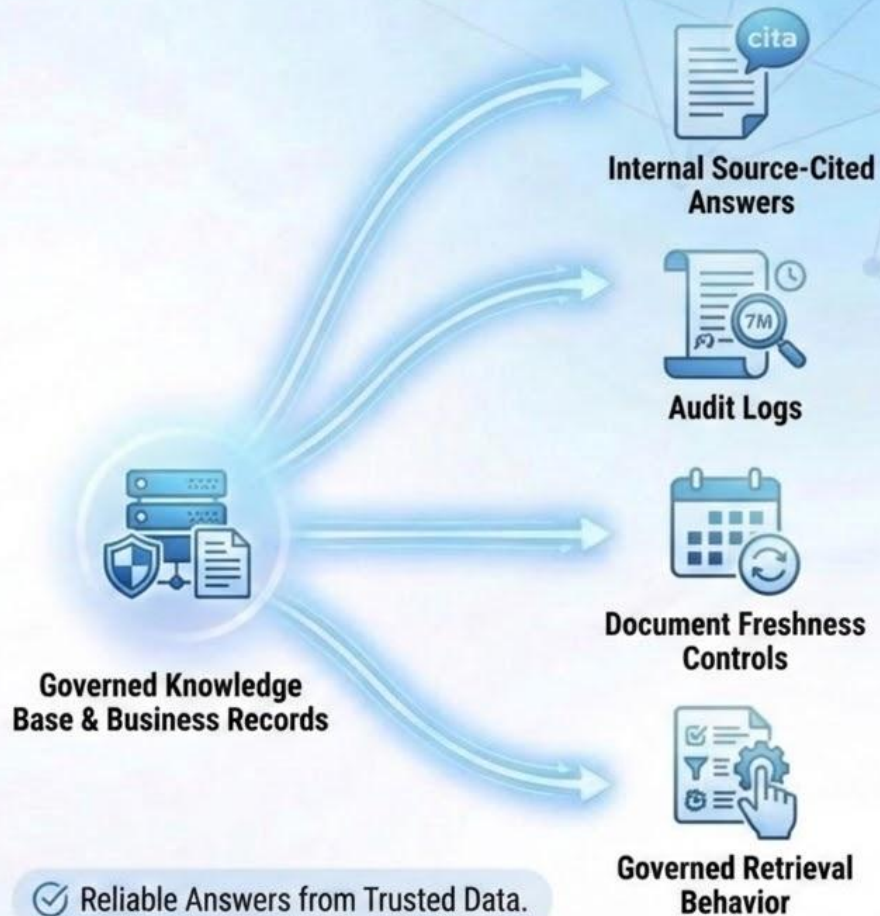
6. Role-aware access and visibility

AI Chat+ includes **role-specific assistant views**, **role-based controls**, and **permission-aware retrieval**. That means the chat experience is intended to show different users the right data, with **security boundaries** around sensitive financial, operational, or customer information.



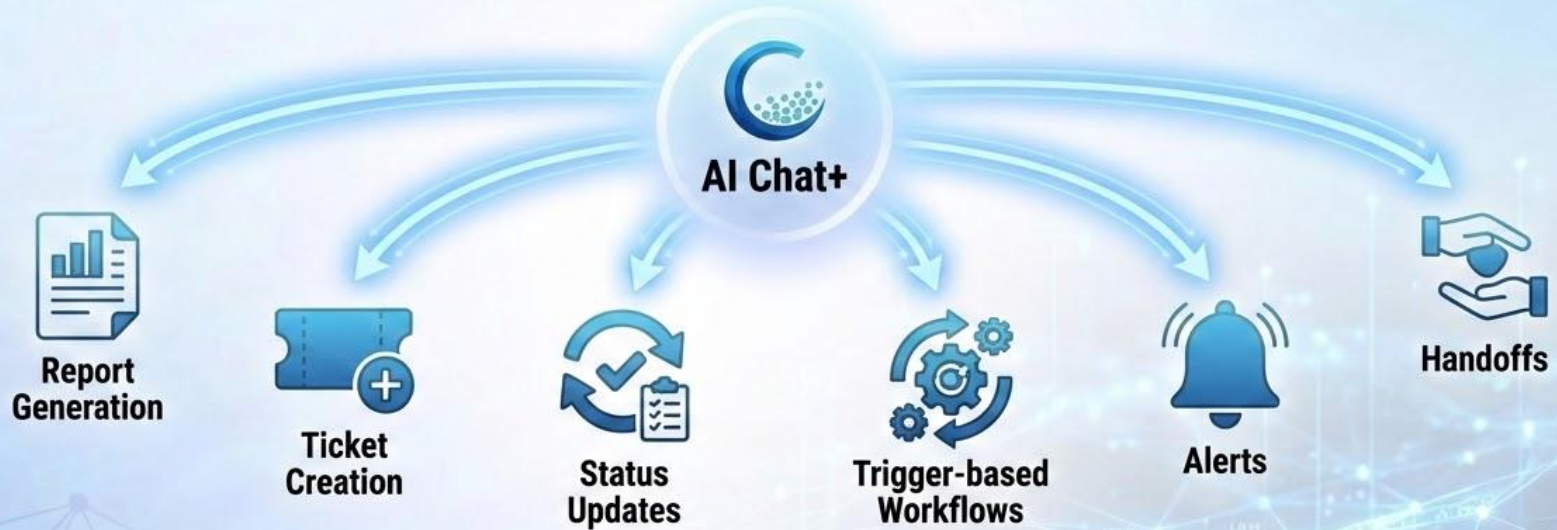
7. Source-backed and governed responses

AI Chat+ includes **internal source-cited answers**, **audit logs**, **document freshness controls**, and **governed retrieval behavior**. So the intended model is not "hallucinate from a prompt," but answer from connected business records and governed knowledge sources.



8. Workflow and automation tie-ins

not just as chat, but a bridge from insight to execution



AI Chat+ is used for...

So AI Chat+ is a part of a larger operating model where answers can lead into actions and automation.

How AI Chat+ works

The workflow looks like this:



Step 1: Connect business data

Claricore starts by connecting the customer's systems, reports, and workflows so the AI can see the real operating picture. Across the platform pages, this includes connectors for operational apps, cloud data, files, APIs, and documents. The platform brings together fragmented systems into a shared intelligence layer.



Step 2: Learn the business model and KPI logic

Claricore evaluates the customer's **goals, workflows, and data environment**, then shapes a tailored AI solution aligned to **operations, metrics, and growth priorities**. The platform learns the customer's **goals, data language, KPI structure, and real workflows**.

How Claricore AI Chat+ Works (Continued)



Step 3: Retrieve the right business context

When a user asks a question, the system appears to pull from structured systems, dashboards, and business documents using governed retrieval.

Related Claricore pages describe **retrieval from structured systems, dashboards, and business documents, with source-linked answers** and freshness controls.



Step 4: Reason over the data

Claricore says its AI layer does more than show what changed. It is meant to detect drivers, explain why trends are happening, uncover KPI root causes, and identify the business area needing the most attention.

The example on the homepage reflects that pattern exactly: the assistant interprets signals, prioritizes the issue, and frames the business risk.

How Claricore AI Chat+ Works (Continued)



Step 5: Recommend actions

After answering, the product is designed to suggest what to do next. Claricore repeatedly uses phrases like action-focused recommendations, next-best actions, alerts, playbooks, and workflow automation. So the intended end state is: ask a question, get the answer, then move toward execution.



Step 6: Improve over time

Claricore's adjacent product pages describe answer-quality monitoring, KPI tracking, feedback loops, A/B testing for prompts and workflows, and measurable ROI tracking. That suggests AI Chat+ is meant to be tuned and improved after deployment rather than shipped once and left static.

What kinds of questions AI Chat+ is built for

From the live site and related solution pages, AI Chat+ is built for questions like:

- What area of the business needs the most attention this month?
- What should we do first?
- Where are we losing time?
- Summarize last quarter.
- Show growth opportunities.
- Why is a KPI slipping?
- What are the root causes behind a trend?
- Which action should the team prioritize next?



**Focus &
Prioritize**



Analyze Performance



- Where are we losing time?
- Why is a KPI slipping?
- What are the root causes behind a trend?



Summarize & Grow

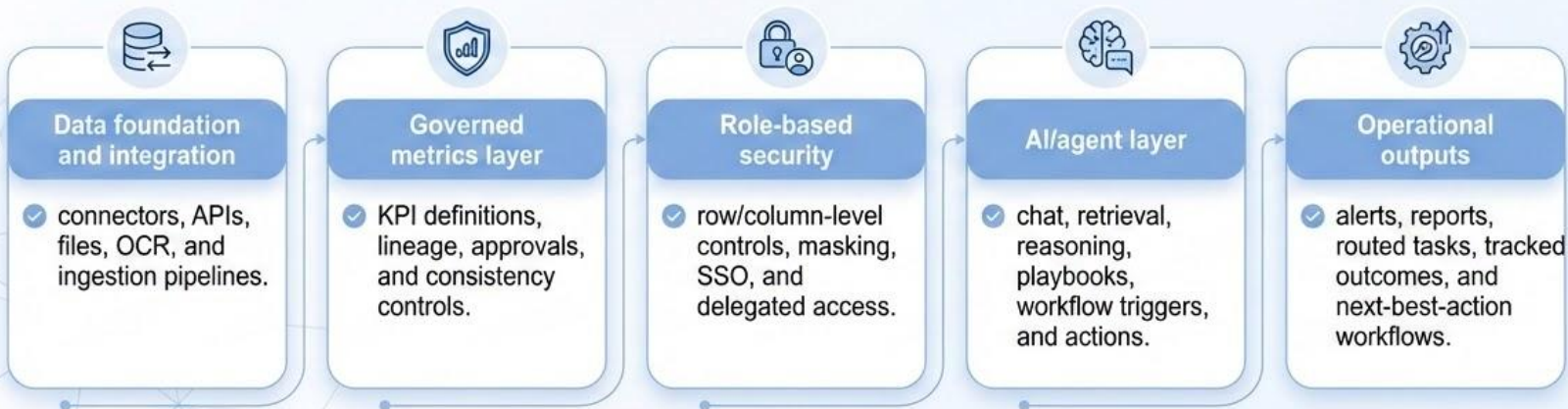


- Summarize last quarter.
- Show growth opportunities.

The bigger architecture around it

Claricore's surrounding platform AI Chat+ sits on top of a broader stack:

- **Data foundation and integration:** connectors, APIs, files, OCR, and ingestion pipelines.
- **Governed metrics layer:** KPI definitions, lineage, approvals, and consistency controls.
- **Role-based security:** row/column-level controls, masking, SSO, and delegated access.
- **AI/agent layer:** chat, retrieval, reasoning, playbooks, workflow triggers, and actions.
- **Operational outputs:** alerts, reports, routed tasks, tracked outcomes, and next-best-action workflows.



Claricore AI Chat+ — Security & Compliance

Governed AI for business data with secure, role-aware access



Role-based access control to ensure users only access data and features permitted by their assigned roles.



Sensitive data protection to tokenize data, redactions and data-security



Auditability via activity logs for maintenance audit trails and logs



Secure retrieval with source-aware answers to secure searching specific big data



Enterprise-ready controls including SSO to secure keys, and security



Compliance support for SOC 2, ISO, HIPAA-related readiness workflows

Bottom line: AI Chat+ is positioned as a secure, governed AI platform for sensitive business data, with compliance-support features designed for security-conscious organizations.

Try AI Chat+ for Your Business. Join hundreds of companies making smarter decisions—faster.



[New Chat](#)

[Dashboard](#)

[Analytics Review](#)

[Marketing Strategy](#)

[Sales Data Q2](#)

[Customer Trends](#)

[Enterprise Pipeline](#)

[Help & Support](#)

[Settings](#)



Here are the key insights from your Q2 performance data:



Revenue increased by 23% compared to Q1, driven by stronger enterprise renewals and larger contract expansions.



Customer acquisition grew by 19%, with the strongest momentum coming from the mid-market segment.



Marketing conversion rates improved by 32%, especially across launch campaigns and retargeting flows.



Average deal size rose by 14%, indicating stronger upsell performance among existing accounts.

Would you like a visual breakdown of revenue, customer growth, and campaign performance?

What insights can you provide from our Q2 performance data?



Ask a follow-up question...



Understand your business data. Instantly with AI.

Chat with all your business data in one place—and get trusted answers, fast.

24/7

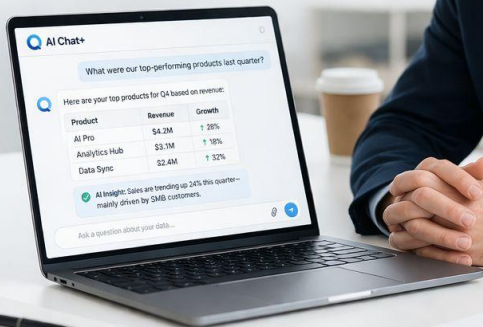
Instant Answers

Connect

All Your Data

No Code

Simple & Secure



**One Place.
All Your Data.**

Connect CRM, ERP, spreadsheets, databases & more.



**Ask Questions.
Get Insights.**

No SQL or dashboards needed.
Just ask in plain English.



**Built for
Security & Privacy**

Your data stays yours. We never store or share it.

Try AI Chat+ for Your Business

Join hundreds of companies making smarter decisions—faster.