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Documentation Modules

Assistants

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Introduction

The **Assistants** module on the CloudBlue Connect platform provides AI-powered guided workflows that help vendors and partners accomplish complex tasks faster and with fewer errors. The assistants in this module targets a specific operational challenge — such as catalog onboarding — and automates the most time-consuming steps while keeping manual review control at critical decision points.

The **Onboarding Assistant** is designed to streamline product catalog onboarding for new vendors. Rather than manually creating Products and Items one-by-one, vendors can upload their existing catalog file and let the assistant handle parsing, mapping, validation, and creation — with full transparency and review at every stage.

> What are Assistants?
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> Assistants on the Connect platform are AI-driven, workflow-guided modules that orchestrate multi-step operations on your behalf. They combine large language model reasoning, deterministic workflow execution, and human-in-the-loop review gates to ensure accuracy, auditability, and control. Assistants reduce manual effort while keeping vendors informed and in command of every outcome.

Onboarding Assistant

New vendors joining CloudBlue Connect typically face a steep onboarding curve: channel domain concepts, extensive documentation, and a manual process of reconciling their own product catalog to Connect's data model. The **Onboarding Assistant** addresses this directly.

Using the Onboarding Assistant, vendors upload their product catalog as an Excel or CSV file. The assistant automatically infers which rows represent Products and which represent Items, generates a proposed mapping from source columns to Connect fields, highlights ambiguities, and presents a clear review screen before anything is written to Connect. Once the vendor confirms, the assistant creates Products and Items (in draft status) on their behalf and produces an auditable report of every outcome.

Throughout the entire flow, the assistant explains key Connect concepts — such as the distinction between Products and Items — in context, using the vendor's own data as examples. This dramatically reduces the learning curve and accelerates time-to-first-value.

Subscription Module Workflow

The following describes the end-to-end flow of the Onboarding Assistant. The wizard-style interface guides vendors through five sequential stages:

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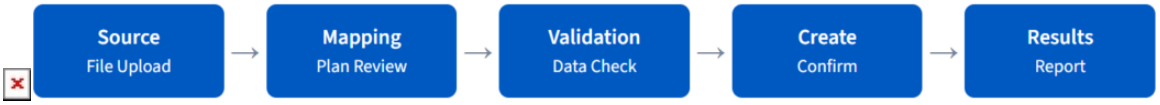

1. **Upload file and start run:** The vendor uploads an Excel or CSV file containing their product catalog. The assistant starts a new onboarding run and immediately begins processing the source data.
2. **Generate mapping plan**: The AI agent ingests the file and uses a large language model to produce a structured mapping plan — identifying which records become Products, which become Items, and how each source column maps to a Connect field. Confidence scores and ambiguity flags are included automatically.
3. **Review mapping**: The assistant presents the proposed mappings in a tabular view. Required fields are highlighted, missing data is flagged, and inline definitions explain the difference between Products, Items, and other Connect concepts using the vendor's own catalog data.
4. **Human-in-the-loop decisions**: The vendor reviews the plan, accepts or adjusts individual mappings, and submits a decision. If ambiguities or missing required fields are detected, the assistant pauses execution and waits for vendor input before proceeding — no consequential action is ever taken automatically.
5. **Validate and execute**: The agent validates all data for required fields, data types, and potential duplicates. After validation passes, the assistant create Products and Items (in draft status). Each creation action is tracked individually with a success or failure status.
6. **Review results and report**: The assistant produces a detailed run report showing per-row outcomes, summary counts (Products created, Items created, failures), error reasons, and direct links to newly created products in Connect. The full report and run artifacts are available for download and audit.
7. **Run history and reuse**: Every run is stored in the Assistant module's history view with its mapping configuration, status, and artifacts. Vendors can reference previous runs to audit past onboardings or reuse a proven mapping configuration for future catalog uploads.

> ●
> Information
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> The agent manages workflow state, human-in-the-loop pauses, and resumability automatically. If the vendor steps away during a mapping review, the run safely persists until they return. All actions are tied to a unique `run_id` for end-to-end traceability.

General Features & Benefits

The following outlines how the Assistants module benefits your organization and simplifies the vendor onboarding experience:

1. **Faster time-to-first-value**: Vendors go from a raw catalog file to created Products and Items in Connect in minutes instead of days.
2. **AI-powered mapping**: An LLM automatically infers how vendor catalog columns map to Connect fields, eliminating manual guesswork.
3. **Human-in-the-loop control**: Vendors review and approve every mapping before execution. The assistant never creates or modifies data without explicit confirmation.

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4. **In-context learning**: Concepts like Products vs. Items are explained inline, using the vendor's own data, reducing reliance on external documentation.
5. **Validation and conflict detection**: Required fields, data types, and potential duplicates are checked before any creation action is executed.
6. **Auditable run history**: Every onboarding run is stored with its full mapping snapshot, validation report, and creation outcomes for traceability and reuse.
7. **Secure and scoped**: All catalog files and run artifacts are treated as sensitive vendor data. Access is correctly scoped per account with no cross-tenant exposure.
8. **Resumable runs**: Runs pause safely at human review points and resume exactly where they left off after a vendor submits a decision.

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