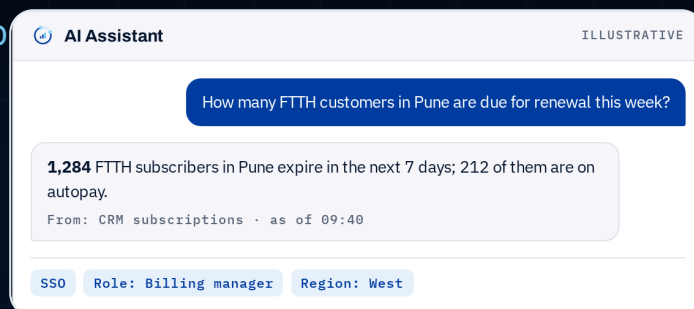


IDENTITY & INTELLIGENCE

i2i AI Assistant

An assistant in the admin and partner portals for how-to questions and live data look-up



ILLUSTRATIVE SCREEN

OVERVIEW

i2i AI Assistant is a chat assistant built into the i2iCore admin portal and partner portal. Staff and partners type a question in plain language, and the assistant answers from the portal's own help knowledge base, with the sources and the menu path to the screen shown alongside.

For questions about live data, such as customers, renewals, revenue or tickets, it calls a fixed list of read-only tools. Each call runs as the signed-in user, through the same gateway the portal uses, so the assistant reads what that person could already read. It does not change any data.

THE CHALLENGE

Billing and operations portals have hundreds of screens. New staff and partners lose time searching menus and asking colleagues, help pages go out of date, and simple questions such as a renewal count need several screens to answer. A generic chatbot is no better: it does not know the portal, and it may see or invent data the user should not.

AT A GLANCE

- ✓ How-to answers with sources and the menu path
- ✓ Read-only look-ups that run as the signed-in user
- ✓ A separate help knowledge base for each portal
- ✓ Your choice of AI model provider and your own key

Capabilities

Knowledge base retrieval Questions are matched to the guidance articles maintained with each portal, using keyword ranking with optional embedding-based matching. Answers cite their sources and give the menu path derived from the caller's own navigation. ○ Separate content for admin and partner portals ○ Served live from each portal's help content	Read-only data tools A registry of read-only tools covers customers, counters, renewals, revenue, sessions, tickets, partners, billing, inventory and reports. Each maps to an endpoint the portal already uses and is executed with the caller's token.
Multi-step answers The assistant can chain tools, such as listing records and then looking up each one. A cap on rounds and calls per question keeps a turn bounded, and when it is reached the assistant answers partly and says so.	Guided plan creation A decision-tree wizard asks a few questions and leads the user to the correct create-plan screen, which suits a task that has many similar options.
Model configuration An administration screen selects the provider and model, tests the connection and stores the key encrypted. Prompt caching is used with Claude, and token usage is logged for all providers.	Conversation record Each turn is stored with its sources, tool calls, model and latency, and answers can be rated. An insights view supports finding gaps in the knowledge base.

Technical summary

COVERAGE	Admin portal and partner portal, each with its own knowledge base and tool set
DATA ACCESS	Read-only tools, run with the signed-in user's token through the API gateway
CHANGE ACTIONS	Not available; a confirm-first framework is in development
PROVIDERS	OpenAI, Azure OpenAI, Anthropic, Mistral or an OpenAI-compatible endpoint; customer supplies the key
KEY STORAGE	Provider key stored encrypted
AUTHENTICATION	Platform token; help content filtered by the user's permitted menu
STORAGE	PostgreSQL record of each conversation turn
DEPLOYMENT	Java service with a separate guidance content service

Related modules

Modules operators often run alongside i2i AI Assistant. Each is a separate module; the integrations that exist are listed in the technical summary above.



Where it is used

A new support agent finds the right screen

A new agent asks how to add a branch. The assistant replies with the steps from the admin knowledge base and the menu path, taken from that agent's own navigation, and cites the article. The agent goes straight to the screen instead of searching menus or asking a colleague.

A manager checks today's renewals

An operations manager asks how many renewals are due today. The assistant calls the matching read-only tool as that manager, returns the count, and lists which tool calls it made. The manager then opens the renewals screen in the portal for the detail.

A partner asks about their own subscribers

A partner user asks about the status of a subscriber. The assistant in the partner portal uses the partner's own token and the partner knowledge base, so it works from what that partner is permitted to see and does not use the admin portal's help content.

See i2i AI Assistant on your network

Talk to our team about your operator type, your network and where to start. We will show you the module and answer the technical questions.

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