

Don't send your customers to an AI vendor. *Become the AI partner they already trust.*

Launch a new AI offering under your own brand without building the platform yourself. Keep the revenue from your consulting, implementation and managed services. Earn a share of Greentic platform revenue. Own the customer relationship and resell software and specialist services from across the Greentic ecosystem.

Launch Your AI Offering →

See the Partner Business Model

Your brand · Your customer · Your services revenue · Shared platform revenue

THE PARTNER DEAL

A business model built to grow your business — *not bypass it.*

Most technology platforms turn partners into lead generators or implementation capacity. Greentic enables partners to build and control their own AI business.



Create a new AI revenue line

Sell AI discovery, working demonstrations, Proofs of Value, implementation, integrations, training, support, managed services and reusable solutions.



You keep what you earn. We share what we earn.

Your advisory, implementation and managed-service revenue remains yours. Greentic shares the platform revenue generated by the customer opportunities you create and lead.



You stay in control

Lead with your brand, own the customer relationship and decide which software providers, solution builders and delivery specialists participate in the customer solution.

ECOSYSTEM

One customer relationship. *An entire ecosystem behind you.*

Give customers the best complete solution rather than being restricted to one vendor's catalogue. Combine your own expertise and services with Greentic software, reusable Digital Workers, third-party software and specialist delivery services.

STARTS WITH

Customer

BUYS

Your branded AI offering

Your services

Advisory, delivery, managed services

Greentic software

Platform and Digital Workers

Partner software

Partner services

Approved ecosystem products

Specialist delivery capacity

Package and resell these capabilities as one joined-up, partner-led proposition. The customer works with you.
Greentic powers the ecosystem behind you.

Greentic powers the ecosystem. *You control what reaches the customer.*

REVENUE JOURNEY

Turn one trusted customer relationship into a *recurring AI business*.



01

Identify the opportunity

Start with a process, problem or customer outcome where AI and automation can create measurable value.



02

Demonstrate it

Turn the requirement into a branded working demonstration that customers can experience—not another slide deck.



03

Deliver it

Use your own delivery team, Greentic Forward Deployed Engineering or specialist services from other ecosystem partners.



04

Operate and expand it

Earn from implementation and managed services, add more customer processes and turn successful solutions into repeatable offers.

DEMONSTRATION

Stop presenting AI. *Start selling working solutions.*

See how a partner turns a customer requirement into a branded working demonstration, then carries the same solution foundation into Proof of Value and production.

Customer problem



Branded working demo



Production solution

The screenshot shows the Oakfield Financial Services website. The header includes the company name and navigation links: Home, Savings, Investments, Pensions, Insurance, About us, Contact, Log in, and a 'Speak to an adviser' button. The main content area features a large heading 'Plan today for a more secure tomorrow' with a subtext 'Explore our range of savings, investment and pension products designed to help you work towards your financial goals.' Below this are two buttons: 'Explore our products' and 'Speak to an advisor'. To the right is a photo of a family (a woman, a man, and a child) looking at a laptop. Below the main heading is a section titled 'Products to help you plan ahead' with four columns: 'Savings Accounts', 'Investment Plans', 'Junior Investment Account', and 'Personal Pensions'. Each column has a brief description and a 'View' button.

Keep the customer. *Win the AI opportunity.*

Become a Greentic Partner →

Explore the Partner Starter Kit

Become a *Greentic Partner*.

Tell us about your business and how you work with customers today. We'll follow up to discuss partner model, commercial route and next steps. Specific customer opportunities and deployment setup are agreed after partner onboarding.

PARTNER COMPANY *

YOUR NAME *

WORK EMAIL *

COUNTRY / REGION

TYPE OF PARTNER *

Select an option



INTEREST AREA *

Select an option



CURRENT CUSTOMER BASE OR TARGET MARKET

Which industries, segments or geographies do you serve?

EXISTING AI READINESS, CONSULTANCY, MSP OR TRANSFORMATION ACTIVITY

What do you do for customers today that Greentic could extend?

NOTES FOR GREENTIC

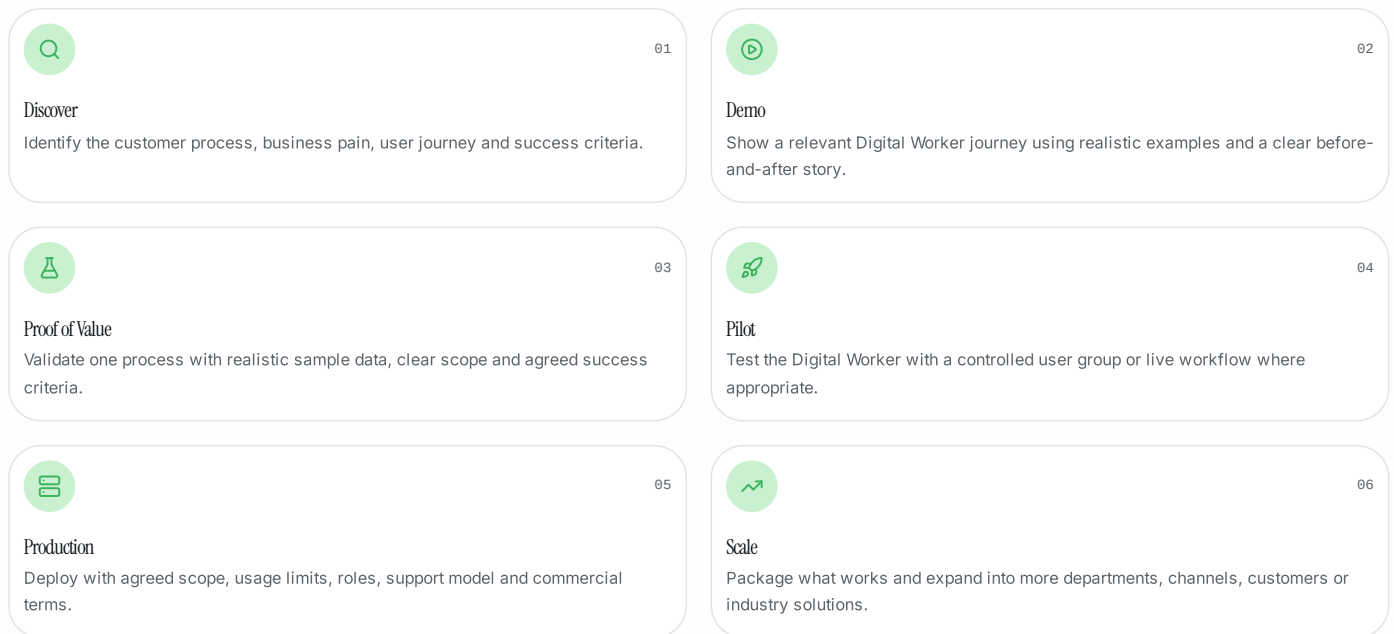
Anything else that would help us understand fit

Partner role, commercial terms, customer deployment setup, support responsibilities and customer engagement model are confirmed through partner onboarding, Order Form or Statement of Work.

Become a Partner →

HOW PARTNER-LED CUSTOMER RELATIONSHIPS PROGRESS

From first conversation to *scaled deployment*.

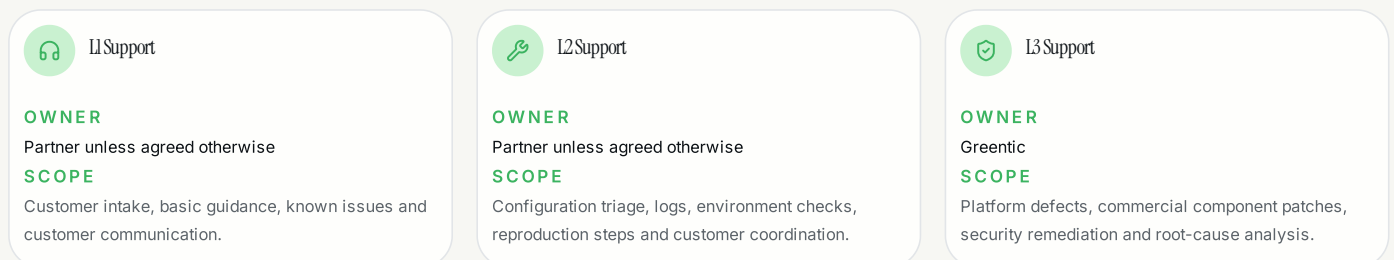


Each customer engagement is documented through the relevant Order Form or Statement of Work where required.

DELIVERY AND SUPPORT MODEL

Clear delivery and *support responsibilities*.

In partner-led engagements, partners usually own customer-facing L1/L2 support unless agreed otherwise. Greentic provides L3 support for confirmed platform issues, commercial component defects, patches, security remediation and root-cause analysis.



FORWARD DEPLOYED ENGINEERING

Forward Deployed Engineering support *when needed*.

Greentic can support partners with discovery, solution design, configuration, integrations, production readiness, troubleshooting and enablement.

- Discovery
- Solution design
- Configuration & integrations
- Production readiness
- Enablement

Forward Deployed Engineering support is scoped separately unless included in the relevant Order Form or Statement of Work.

Ready to build your *Digital Worker practice*?

Start with one customer process, one guided journey and one clear route to value. Greentic gives partners the platform, enablement and commercial structure to sell, deliver and scale Digital Worker solutions.

Become a Partner →

Explore the Starter Kit

THE GREENTIC PARTNER COMMERCIAL MODEL

Earn every month. Earn on every sale. *Earn every time your solution is reused.*

Small and medium businesses use Greentic through monthly subscriptions with included credits. Partners earn recurring commission from customer subscriptions and credits, commission on everything sold through their branded Partner Store, and creator revenue when solutions they build are sold across the Greentic partner ecosystem.

Subscription commission · Partner Store commission · Solution creator revenue

Become a Greentic Partner →

Explore the Partner Starter Kit

THE FORMULA

Partner revenue = Your services revenue + Subscription commission + Store commission + Solution creator revenue

Simple for the customer. *Recurring for the partner.*

Greentic uses credits as the usage currency for small and medium businesses. Every monthly subscription includes an allocation of credits that customers use when running Greentic-powered solutions.

1

Choose a monthly subscription
The customer selects a subscription based on the expected size and usage of their Greentic environment.

2

Receive included credits
Every subscription includes a monthly allocation of Greentic credits. Higher subscription tiers include more credits.

3

Grow as usage grows
As the customer introduces more Digital Workers, users and automated business processes, they can move to a subscription with more included credits.

The partner earns recurring commission from eligible customer subscriptions and credit purchases.

Higher customer usage



Higher subscription tier



More included credits



More recurring partner revenue

The credit-based subscription model applies to standard small and medium business plans. Bespoke and enterprise commercial arrangements may be handled separately.

Three ways Greentic *grows partner revenue.*



Subscription and credit commission

Bring a customer onto Greentic and earn recurring commission from their eligible monthly subscription and credit purchases.

As your customer's use of Greentic grows, your recurring commission can grow with it.



Partner Store commission

Your branded Partner Store can include Greentic software, reusable Digital Workers, integrations, components and specialist services from across the Greentic ecosystem. You earn Store commission on approved products and services purchased through your Store—even when they were created or delivered by another partner.

You do not need to build everything you sell.



Solution creator revenue

Turn your expertise into reusable Digital Workers, workflows, connectors, templates and industry solutions. Sell them through your own Partner Store or make them available through other partners' Stores. You earn creator revenue whenever your solution is purchased.

Build once. Sell through many partners. Earn repeatedly.

Your Store is your sales channel. The partner network is *your distribution channel*.



Sell solutions created by others

Add approved software, Digital Workers and specialist services from Greentic and other partners to your branded Partner Store. When your customer purchases through your Store, you earn the Store commission. You can also provide and retain the revenue from your own implementation, integration, support and managed services.

- Customer
- ↳ Your branded Partner Store
- ↳ Greentic software, partner solutions and specialist services
- ↳ **Store commission for you**



Let other partners sell your solutions

Publish your reusable solutions to the Greentic ecosystem and make them available through other Partner Stores. When another partner sells your solution, they earn the Store commission and you earn the solution creator revenue.

- Your reusable solution
- ↳ Other Partner Stores
- ↳ Their customers
- ↳ **Creator revenue for you**

Sell what others build. *Let others sell what you build.*

One customer relationship can generate *multiple revenue streams*.

1



The customer subscribes

A small or medium business joins Greentic through your branded offering.

You earn recurring subscription and credit commission.

2



The customer buys a solution

The customer purchases an approved solution created by another partner through your Partner Store.

You earn the Partner Store commission. The solution creator earns creator revenue.

3



You implement and manage it

Your team configures the solution, integrates it with the customer's systems and provides ongoing support.

You keep your implementation and managed-service revenue.

4



You create a reusable solution

You package your customer and industry expertise into a reusable Greentic solution and make it available to other Partner Stores.

You earn creator revenue whenever another partner sells it.

The partner can earn from the customer relationship, the Store transaction, its own delivery services and the reusable intellectual property it creates.

Your services revenue *remains yours.*

Charge customers for discovery, consulting, working demonstrations, Proofs of Value, implementation, integration, training, support and managed services. Greentic shares its platform and ecosystem revenue with partners. It does not replace the partner's existing services business.

You keep what you earn. *Greentic shares what it earns.*

THE COMPLETE COMMERCIAL MODEL

- ✓ Your consulting revenue
- ✓ Your implementation revenue
- ✓ Your managed-service revenue
- ✓ Greentic subscription commission
- ✓ Partner Store commission
- ✓ Solution creator revenue

↗ Total partner revenue

Turn customer trust into *recurring AI revenue.*

Bring customers onto Greentic, offer a complete catalogue through your own branded Partner Store and create reusable solutions that other partners can sell.

Become a Greentic Partner →

Explore the Partner Starter Kit

Your customers. Your services. Your Store. *A complete partner ecosystem behind you.*

Commission rates, customer attribution, Store approval, solution validation, revenue allocation and payment terms are defined in the applicable Greentic Partner Agreement and Commercial Guide.

STARTER KIT

Greentic Partner *Starter Kit*.

The Greentic Partner Starter Kit gives partners the practical material they need to understand, sell, demo, deliver and grow with Greentic. It is designed as a hands-on enablement hub, not a static document.



01

Understand Greentic

Learn what Greentic is, what digital workers are, and why Greentic is different from chatbots, traditional RPA and generic AI agents.

[Understand Greentic →](#)



02

Sell Greentic

Use clear pitches, customer pain points, business outcomes and objection handling to explain Greentic confidently to prospects.

[Learn how to sell →](#)



03

Demo Greentic

Run impressive demos that show how Greentic turns manual processes into structured, AI-assisted digital workers.

[Explore demo guidance →](#)



04

Deliver Greentic

Follow a practical delivery approach from discovery and design through to validation, deployment and scale.

[View delivery method →](#)



05

Market Greentic

Use campaign themes, landing page messaging, LinkedIn ideas and webinar concepts to create demand.

[Explore marketing kit →](#)



06

Grow with Greentic

See how partners can develop from first opportunity to repeatable solutions, certifications and industry accelerators.

[Plan partner growth →](#)

PARTNER JOURNEY

Understand → Sell → Demo → Deliver → Market → Grow

Partners can start with a simple demo or proof of value, then build repeatable industry solutions over time.

Start with the basics, then build your first *customer conversation*.

[Understand Greentic →](#)

[View Sales Guide](#)

Understand Greentic

Greentic helps partners create guided digital workers for real business operations. These digital workers help customers and employees complete tasks more easily by asking the right questions, showing clear choices, collecting the right information, supporting approvals and handing over to people when judgement is needed.

The goal is simple: help businesses use AI in a practical, controlled and useful way — not as another experiment, but as part of everyday work.

SECTION 1

What is Greentic?

Greentic is a platform that helps partners turn business processes into guided digital workers.

A Greentic digital worker can support a customer, employee or manager through a business journey. It can ask for the right information, explain the next step, show clear options, prepare summaries, support approvals and involve a person when needed.

This makes Greentic useful for processes such as customer service, HR onboarding, invoice approval, IT support, sales support and compliance checks.



Guided business journeys

Help users move through a process step by step instead of leaving them with confusing forms, email chains or open-ended chats.



AI with business control

Use AI to understand, summarise and assist, while keeping important business decisions within agreed rules and approval steps.



Better handover to people

When a person needs to step in, they receive the context, collected information and summary of what has already happened.

SECTION 2

Why businesses need guided digital workers

Many organisations have the same problem: their processes depend on people chasing information, reading long email trails, switching between systems and answering the same questions again and again.

AI can help, but business leaders also need consistency, accountability and control.

Greentic gives partners a way to introduce AI into operations without letting it run freely without boundaries.



Too much work starts in messy channels

Requests arrive through email, chat, forms, tickets and calls, often with missing information.



Staff spend time chasing details

Employees waste time asking follow-up questions before they can actually solve the problem.



Customers and employees get stuck

People do not always know which process to follow, what information is needed or who should approve the next step.



AI pilots do not become business change

Many AI demos look impressive, but they do not become reliable, day-to-day operational processes.



Leaders want AI, but not chaos

Business leaders want faster service and lower effort, but they also need clear boundaries, approvals and human oversight.

SECTION 3

What is a digital worker?

A digital worker is a guided assistant that helps someone complete a business task.

It is not just there to chat. It helps move work forward.



A digital worker can...

- ✓ Welcome a customer or employee
- ✓ Understand what they need
- ✓ Ask the right follow-up questions
- ✓ Collect the information required
- ✓ Show clear options
- ✓ Support approvals
- ✓ Prepare a summary
- ✓ Trigger the next business step
- ✓ Escalate to a person with context

EXAMPLES



Customer service

A digital worker that helps customers resolve common issues.



HR onboarding

A digital worker that guides new employees through onboarding.



Finance approvals

A digital worker that supports invoice approvals and exceptions.



IT support

A digital worker that collects the right details before routing a support request.



Sales support

A digital worker that helps qualify leads and prepare next actions.



Compliance

A digital worker that guides users through checks and evidence collection.

SECTION 4

Why Greentic is different



Compared with chatbots

Chatbots usually answer questions. Greentic digital workers help people complete business processes.

- Chatbots are often open-ended.
- Greentic guides users through clear steps.
- Chatbots may answer an FAQ.
- Greentic helps collect information, show options, support decisions and prepare handovers.



Compared with traditional automation

Traditional automation often works behind the scenes. Greentic creates guided business experiences that customers, employees and managers can interact with.

- Traditional automation may remove individual tasks.
- Greentic improves the whole journey.
- Traditional automation can be hidden from users.
- Greentic helps users understand what to do next.



Compared with pure autonomous AI agents

Fully autonomous AI agents can be powerful, but many businesses are not ready to let AI decide freely inside important operations.

- Businesses need clear rules, approvals and boundaries.
- Greentic gives AI a controlled role inside a business process.
- AI can help understand, summarise and suggest.
- The business remains in control of what happens next.

“Greentic is designed for organisations that want the speed and intelligence of AI, but with the control, consistency and accountability that business operations require.”

SECTION 5

AI with business control

Business leaders do not want uncontrolled AI making every important decision. They want AI to help people work faster while the business keeps control over the process.

Greentic supports this balance. AI can help understand requests, summarise information, suggest next steps and make the experience easier. The business can still define the journey, the approval points, the escalation rules and the boundaries.



Business steps

Define the agreed path the user should follow.



AI assistance

Use AI to understand, summarise and support the journey.



Approval points

Keep important decisions with the right people.



Human escalation

Bring in a person when judgement, sensitivity or exception handling is needed.



Clear history

Keep the context of what happened so people do not need to start again.

SECTION 6

Guided experiences, not just open chat

Open chat is not always the best way to complete business work. Users often need clear choices, forms, summaries, approvals and next steps.

Greentic digital workers can guide users through these business moments with clear interactive screens rather than relying only on free-text conversation.



Choose the type of support needed



Confirm customer or employee details



Provide missing information



Review a summary before submission



Approve or reject a request



Select the next action



Escalate to a person with context

Technical note: these guided screens may be implemented using adaptive cards or similar interface components, but the business value is the guided experience.

SECTION 7

What partners can help customers do



Improve customer service

Guide customers to answers, actions or escalation faster.



Reduce internal admin

Help teams spend less time chasing information and repeating the same answers.



Improve approvals

Give managers clearer context before they approve, reject or request changes.



Make AI operational

Move from AI experiments to practical business journeys.



Start with proof of value

Begin with one process, realistic sample data and clear success criteria.



Build repeatable solutions

Turn successful digital workers into reusable partner offerings for industries or departments.

KEY PARTNER MESSAGE

“Greentic helps partners move customers from messy manual processes and uncontrolled AI experiments to guided digital workers that are practical, controlled and ready for business operations.”

Next: Learn how to sell Greentic →

Explore demo guidance

Sell Greentic

Greentic gives partners a practical way to help customers move from manual processes, disconnected systems and generic AI experiments to guided digital workers that are useful, controlled and ready for real business operations.

This page gives partners simple pitches, customer pain points, business outcomes, objection handling and discovery questions for early sales conversations.

CORE POSITIONING

“Greentic helps partners turn manual business processes into guided digital workers that combine AI assistance with business control.”

SECTION 1

Explain Greentic in seconds

Three pitch lengths for different moments in a customer conversation.



15 SECONDS

Greentic helps businesses turn manual processes into guided digital workers that support customers and employees, reduce repetitive work and keep AI under business control.



30 SECONDS

Greentic gives partners a practical way to create digital workers for real business processes. These workers can guide users through clear steps, collect the right information, show choices and approvals, use AI where it helps, and hand over to people when needed.



2 MINUTES

Many businesses are testing AI, but they struggle to turn it into reliable operational improvement. A chatbot can answer questions, but it often does not complete the process. Traditional automation can remove some tasks, but it may not improve the customer or employee journey. Pure agentic AI can feel too open-ended for business-critical work.

Greentic helps partners bridge that gap. It allows them to design guided digital workers that combine business process control with AI assistance. A digital worker can ask the right questions, collect the right information, guide the user through the next step, support approvals, prepare summaries and escalate to a person when judgement is needed.

This gives partners a strong way to help customers start small with a proof of value, demonstrate impact quickly, and then scale successful digital workers across departments or industries.

SECTION 2

Problems customers recognise immediately

These are the friction points customers nod along to within the first few minutes of a conversation.



Customers and employees get stuck in unclear processes

People often do not know what to do next, which form to complete, who to ask or what information is needed.



Too many requests arrive with missing information

Requests often come through email, chat, forms or tickets without the detail needed to resolve them.



Staff waste time asking follow-up questions

Teams spend too much time chasing missing information instead of solving the actual problem.

Managers approve decisions without enough context

Approvals are often made from incomplete email trails, disconnected documents or unclear summaries.



AI experiments are not becoming operations

Customers may have tried AI tools, but they struggle to turn impressive demos into reliable business processes.



Automation projects take too long

Traditional process automation and integration projects can take months before the business sees value.



Handovers are messy

When work moves between people, teams or systems, important context is often lost.



Business leaders want AI benefits without losing control

Customers want the speed and intelligence of AI, but they also need governance, accountability and clear boundaries.

SECTION 3

What customers can achieve

Translate the pain into outcomes a business sponsor will care about.



Faster service

Guide customers and employees to the right outcome more quickly.



Less repetitive admin

Reduce routine questions, chasing and manual handovers.



Better guided journeys

Replace confusing email chains and forms with clear step-by-step experiences.



More controlled AI adoption

Use AI where it helps, while keeping important business decisions within agreed boundaries.



Better escalation

When a person needs to step in, they receive the history, summary and collected information.



Repeatable partner solutions

Partners can package successful digital workers into reusable solutions for specific industries or departments.

SECTION 4

Why Greentic is different

Position Greentic clearly against the three things customers may already have in mind.



Compared with chatbots

Chatbots usually answer questions. Greentic digital workers are designed to help users complete business processes.

- Chatbots are often open-ended conversations.
- Greentic guides people through clear steps.
- Chatbots may answer an FAQ.
- Greentic can collect information, show choices, support approvals and prepare a proper handover to a person.



Compared with traditional RPA

RPA usually automates tasks behind the scenes. Greentic creates guided business experiences that people can actually interact with.

- RPA often works in the background.
- Greentic can work directly with customers, employees and managers.

- RPA is usually task automation.
- Greentic is about improving the whole journey: request, guidance, decision, action and escalation.



Compared with pure agentic AI

Pure agentic AI can be powerful, but many businesses need more control before they trust AI inside operations.

- Pure agentic AI may decide the next step too freely.
- Business teams often need agreed steps, approvals and boundaries.
- Greentic gives AI a controlled role inside a business process.
- AI can help understand, summarise and suggest.
- The business process still defines what should happen, when to ask for approval and when to involve a person.

“Greentic is for organisations that want the speed and intelligence of AI, but with the control, structure and accountability that business operations require.”

SECTION 5

Best buyer conversations

The roles that most often have both the pain and the budget to act.



Operations leaders

PAIN

Too much manual coordination across teams.

MESSAGE

Greentic can help turn repeatable operational processes into guided digital workers.



Customer service leaders

PAIN

High support volumes, inconsistent responses and expensive escalations.

MESSAGE

Greentic can guide common support journeys and escalate complex cases with context.



HR leaders

PAIN

Employees ask the same onboarding, policy and process questions repeatedly.

MESSAGE

Greentic can guide employees through HR journeys and reduce repetitive HR admin.



Finance leaders

PAIN

Approvals, invoice queries and exception handling are slow and email-driven.

MESSAGE

Greentic can structure finance workflows and support approval journeys.



IT leaders

PAIN

Tickets are poorly described, misrouted or missing key information.

MESSAGE

Greentic can collect the right details, classify requests and route issues more effectively.



Innovation and transformation leaders

PAIN

AI pilots are visible, but operational impact is limited.

MESSAGE

Greentic can turn AI ideas into practical digital worker demos and proof-of-value projects.

SECTION 6

How to answer common objections

Short, confident answers to the questions partners hear most.

🔍 Is this just a chatbot?	▼
🔍 Is this just RPA?	▼
🔍 Why not just use a fully autonomous AI agent?	▼
🔍 How do we make sure AI does not go off track?	▼
🔍 Can this integrate with our systems?	▼
🔍 Will this replace our people?	▼
🔍 Can we start small?	▼
🔍 What makes this partner-friendly?	▼

SECTION 7

Questions to ask in the first customer meeting

Use these as a flexible guide. The goal is to understand the process, the people and the pain — not to interrogate.

🔍 Process discovery

- Which routine processes create the most manual work today?
- Which requests arrive repeatedly through email, chat, forms or tickets?
- Where do users often provide incomplete information?
- Which processes have too many handovers?
- Which processes are slow because people are waiting for approvals or clarification?

🤖 AI and automation readiness

- Have you already tried AI assistants, chatbots or automation tools?
- What worked well?
- What failed or felt risky?
- Where would AI help if the process was properly controlled?
- Which decisions must remain rule-based or human-approved?

📖 User journey discovery

- Where do customers or employees currently get stuck?
- What information do they often miss?
- Which steps cause frustration?
- Where would a guided experience be better than a form, email or open chat?
- What would make the journey feel easier and faster?

🗣️ Channel discovery

- Where do users currently ask for help?
- Do employees use Teams, Slack, Webex or email?
- Do customers use webchat, WhatsApp, portals or email?
- Which channel would make the first demo most compelling?

🔗 Integration discovery

- What systems contain the data needed for the process?
- Which actions would the digital worker eventually need to trigger?
- Could a first proof of value start with sample or hard-coded data?
- Which integrations are essential for production?
- Which integrations can wait until after the process is validated?

🎯 Success criteria

- What would make a proof of value successful?
- How much time could be saved?
- Which manual steps could be removed?
- How would you measure user experience improvement?
- What would justify scaling the solution?

SECTION 8

Good first opportunities

Qualify the first project carefully. Most early failures come from picking the wrong process, not from the technology.

A GOOD FIRST GREENTIC OPPORTUNITY USUALLY HAS:

- ✓ A repeatable process
- ✓ High enough volume to matter
- ✓ A visible business owner
- ✓ A clear before-and-after story
- ✓ Potential to expand after the first success
- ✓ Clear user pain
- ✓ Structured decisions or data collection
- ✓ A process that can be demonstrated with realistic sample data
- ✓ A safe scope for a proof of value

 **Avoid** starting with the most complex, politically sensitive or heavily integrated process. Start with something visible, valuable and achievable.

SECTION 9

Suggested first customer conversation

A simple structure that keeps the conversation focused on the customer's process and outcomes.

- 1 Start with the business problem
- 2 Explain guided digital workers
- 3 Show how Greentic is different from a chatbot, RPA and pure agentic AI
- 4 Identify one candidate process
- 5 Discuss the user journey and where people get stuck
- 6 Discuss channels and sample data
- 7 Define a small proof-of-value scope
- 8 Agree success criteria
- 9 Plan the next demo or workshop



PARTNER TIP

Do not lead with AI features. Lead with the customer process, the friction users experience today and the business outcome the customer wants.

Ready to turn the conversation into a demo?

Once a customer recognises the problem, the next step is to show how a Greentic digital worker could improve one real process.

[Next: Demo Greentic →](#)[Explore Proof of Value](#)

Demo Greentic

Greentic demos should not feel like generic AI chatbot demos. A great demo shows a real business journey: a customer, employee or manager has a task to complete, the digital worker guides them through clear steps, AI helps where useful, and the business stays in control.

This page gives partners a simple demo method, demo principles and starter demo ideas for customer service, HR, finance, IT, sales and guided business experiences.

CORE POSITIONING

“Great Greentic demos show how a manual business process becomes a guided digital worker that helps users complete work faster, with better control and clearer handover to people.”

SECTION 1

What a great Greentic demo should prove



It solves a real business problem

Start with a process people recognise: support requests, onboarding, approvals, IT tickets, sales follow-up or compliance checks.



It guides the user

Show that the user is not left in an open chat. They are guided through clear choices, questions and next steps.



It reduces manual chasing

Show how the digital worker collects the right information before a person or team needs to act.



It keeps the business in control

Show approval points, boundaries, escalation and clear next steps.



It improves handover

Show that when a person needs to step in, they receive a summary and the information already collected.



It can start small

Show that the first version can use realistic sample data before moving to production integrations.

SECTION 2

The demo story partners should tell

BEFORE GREENTIC

Work is handled through emails, forms, spreadsheets, tickets or chat messages. Information is missing, people ask follow-up questions, approvals are slow and handovers lose context.

WITH GREENTIC

A guided digital worker welcomes the user, understands what they need, asks the right questions, shows clear choices, collects required information, supports approvals and escalates when needed.

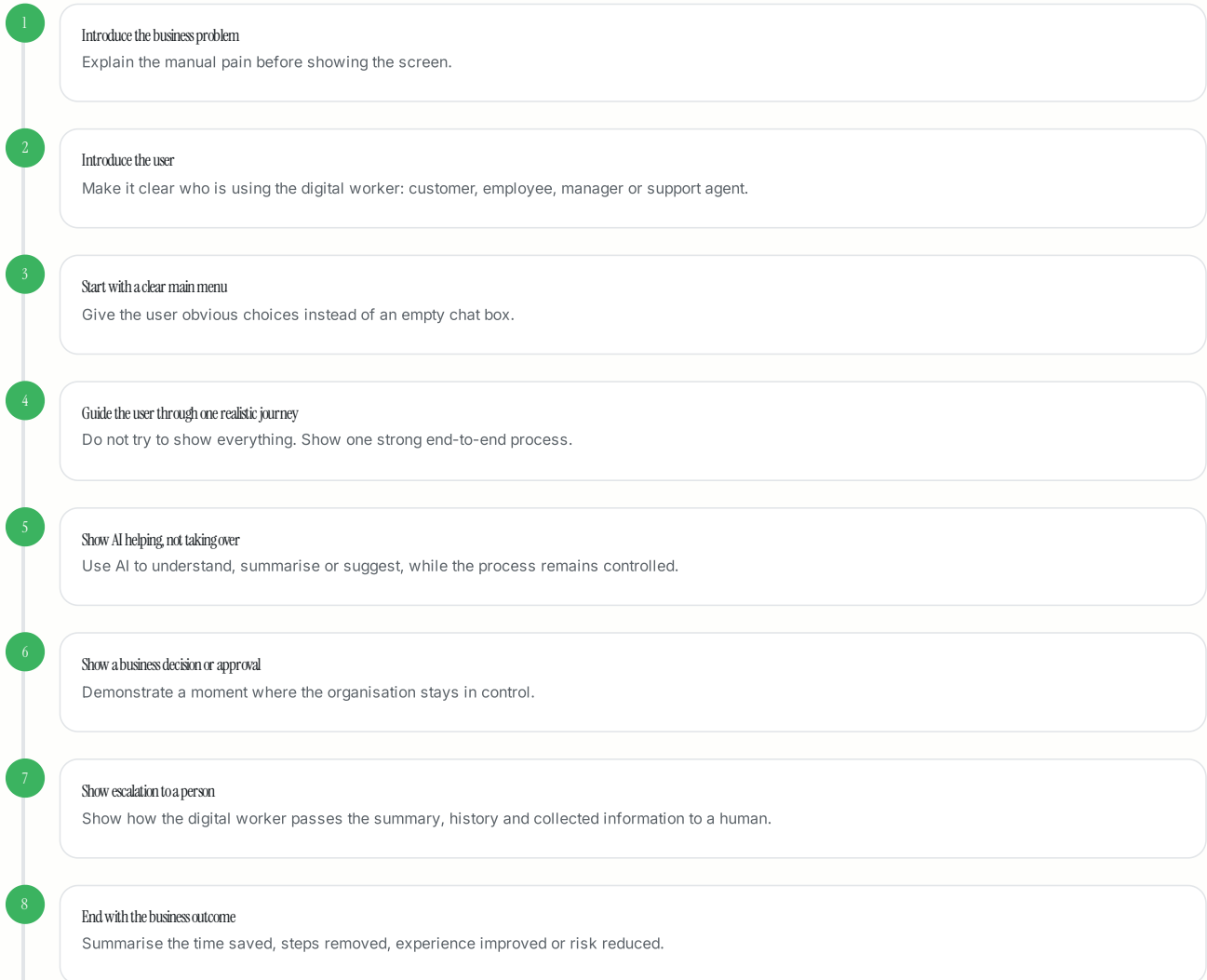
AFTER GREENTIC

The process is easier for users, staff receive better information, managers have clearer context and the business has a repeatable way to improve similar journeys.

SECTION 3

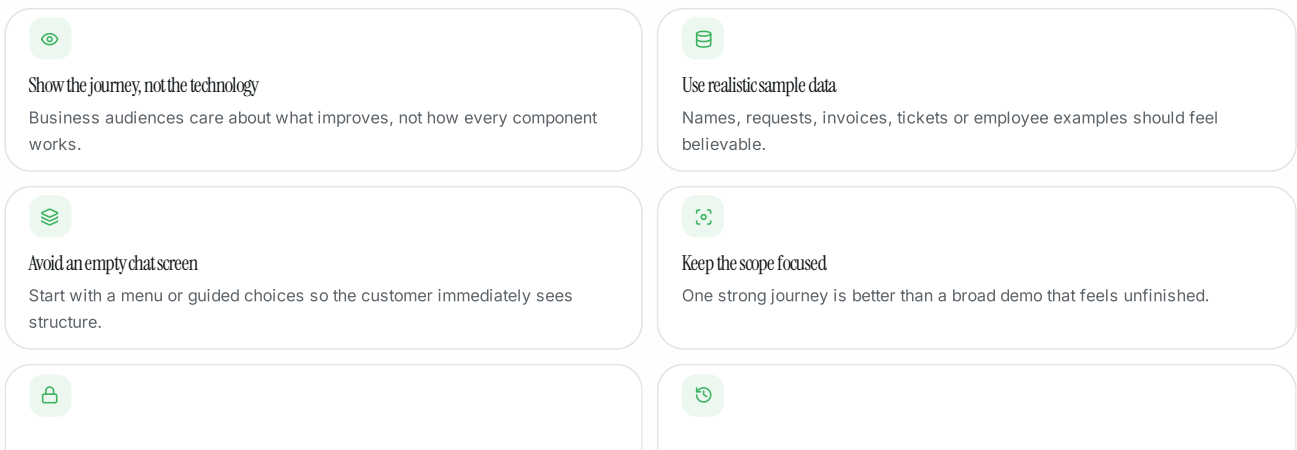
Recommended demo flow

A simple step-by-step structure that keeps the demo focused on the customer's business journey.



SECTION 4

Demo principles



Show control

Include approval, escalation, validation or boundaries so the customer sees that AI is not running freely.



Use business language

Say 'guided experience' or 'approval screen' rather than technical implementation terms.

Tell the before-and-after story

Make the manual pain visible before showing the improved journey.



End with next steps

Close with how this could become a proof of value for the customer.

SECTION 5

Starter demo library

Six starter demos partners can use to spark customer conversations across the most common business areas.



Customer Service Digital Worker

BUSINESS PROBLEM

Customers ask repeated questions, provide incomplete information and wait too long for help.

WHAT TO SHOW

A guided support journey that identifies the issue, collects details, suggests next steps and escalates with context.

BEST AUDIENCE

Customer service leaders, operations leaders and transformation teams.

[View customer service demo](#) →



HR Onboarding Digital Worker

BUSINESS PROBLEM

New employees and managers ask repeated questions and struggle to follow onboarding steps.

WHAT TO SHOW

A guided onboarding journey that answers common questions, collects missing information and shows the next tasks.

BEST AUDIENCE

HR leaders, people operations teams and internal service teams.

[View HR demo](#) →



Invoice Approval Digital Worker

BUSINESS PROBLEM

Invoice approvals are slow because information is spread across emails, systems and documents.

WHAT TO SHOW

A guided finance journey that summarises an invoice, highlights exceptions, requests approval and records the decision.

BEST AUDIENCE

Finance leaders, operations leaders and shared services teams.

[View invoice approval demo](#) →



IT Operations Digital Worker

BUSINESS PROBLEM

IT requests are often unclear, misrouted or missing the information needed for resolution.

WHAT TO SHOW

A guided IT support journey that collects diagnostics, categorises the issue and routes it with a clear summary.

BEST AUDIENCE

IT leaders, service desk managers and operations teams.

[View IT operations demo](#) →



Sales Assistant Digital Worker

BUSINESS PROBLEM

Sales teams lose time qualifying leads, preparing follow-ups and finding the right information.

WHAT TO SHOW

A guided sales journey that captures lead details, suggests next actions and prepares a follow-up summary.

BEST AUDIENCE

Sales leaders, revenue operations teams and account managers.

[View sales assistant demo](#) →



Guided Experiences Showcase

BUSINESS PROBLEM

Many AI demos are just open text conversations, which makes them feel uncontrolled and hard to trust.

WHAT TO SHOW

A showcase of guided business screens such as choices, forms, summaries, approvals, exception handling and escalation.

BEST AUDIENCE

Business leaders, innovation teams, transformation teams and partners.

[View guided experiences](#) →

SECTION 6

Simple demo script template

A reusable script to keep the narrative consistent across partner-led demos.

OPENING

"Today I will show how Greentic can turn a manual process into a guided digital worker. The goal is not to show a chatbot answering random questions. The goal is to show a better business journey."

BUSINESS PROBLEM

"Currently, this process depends on emails, forms, tickets or manual handovers. Information is often missing and staff have to chase details before work can move forward."

DEMO JOURNEY

"The digital worker starts by guiding the user through clear choices. It asks for the right information, uses AI where helpful, supports the right business step and keeps the user moving."

CONTROL MOMENT

"This is where the business stays in control. The worker does not make every decision freely. It follows agreed steps, asks for approval when needed and escalates to a person when judgement is required."

OUTCOME

"The result is a smoother user experience, less repetitive admin, better handover and a clear path towards a proof of value."

SECTION 7

What to avoid



Do not start with a blank chatbot

An empty chat box makes the demo look generic. Start with guided options or a clear menu.



Do not overpromise autonomy

Business customers need confidence that AI is controlled. Avoid suggesting that AI will freely run critical operations without boundaries.



Do not show too many journeys

Too many paths can make the demo feel shallow. Focus on one strong process.



Do not lead with technical architecture

Save technical detail for later. First prove the business value.



Do not use unrealistic sample data

Fake data should still feel like something the customer recognises from real work.



Do not skip the human handover

Escalation is often where customers see the practical value: better context, less repetition and clearer next steps.

SECTION 8

From demo to proof of value

After a successful demo, the next step is to define a small proof of value. The best proof of value focuses on one process, one user journey and a realistic set of examples.



PROOF OF VALUE CHECKLIST



Select one business process



Agree the target users



Identify the current manual pain



Choose the first channel to demonstrate



Use realistic sample data



Define success criteria



Decide what is included and excluded



Agree the next workshop or proof-of-value scope

[Explore Proof of Value →](#)

Ready to build the first partner demo?

Start with one business process, one clear user journey and one visible business outcome.

© View demo library

Next: Deliver Greentic →

Deliver Greentic

Greentic delivery is about helping customers move from a manual or confusing business process to a guided digital worker that is useful, controlled and ready to improve everyday work.



Successful Greentic delivery starts small, proves value quickly and then expands into repeatable digital worker solutions.

The best first engagements are focused, practical and measurable. Partners should avoid trying to automate everything at once. Start with one process, one user journey and one clear business outcome.

SECTION 1

Delivery principles

Six principles that shape every successful Greentic engagement.



Start with one process

Choose a process that is visible, painful and achievable. One strong journey is better than a broad project that tries to solve everything.



Make the manual pain clear

Understand what happens today: where users get stuck, where staff chase information and where handovers break down.



Design the guided journey

Create a clearer path for the user: the right questions, the right choices, the right approvals and the right handover.



Keep AI under control

Use AI where it helps — understanding, summarising or suggesting — but keep important business decisions within agreed boundaries.



Prove value quickly

Use a small proof of value to show whether the digital worker improves the journey before investing in a wider rollout.



Prepare for scale

Design the first digital worker so it can become a reusable pattern for other departments, industries or customer processes.

SECTION 2

The Greentic delivery method

A six-step journey from first conversation to a repeatable solution.

1 Discover → 2 Design → 3 Demo → 4 Validate → 5 Deploy → 6 Scale



1. Discover

Understand the business problem, the users, the current journey and what success would look like.

ACTIVITIES

- Identify the process owner
- Map the current manual journey
- Capture pain points and handovers
- Understand where users get stuck
- Agree the first journey to improve
- Define success criteria

OUTPUT

A clear description of the current problem and the first journey to improve.



2. Design

Design the guided digital worker journey before worrying about full production integration.

ACTIVITIES

- Define the user journey
- Decide what questions the digital worker should ask

- Decide what choices or screens the user should see
- Define approval points
- Define escalation points
- Decide where AI can help
- Decide what should remain human-controlled

OUTPUT

A simple target journey showing how the digital worker should guide the user.

3. Demo

Create a compelling demonstration using realistic sample data.

ACTIVITIES

- Build a focused demo journey
- Use realistic names, requests, tickets, invoices or scenarios
- Show the before-and-after story
- Show a control point
- Show human handover
- Collect feedback from the business owner

OUTPUT

A demo that business stakeholders can understand and react to.

4. Validate

Test whether the journey is useful, trusted and valuable.

ACTIVITIES

- Run through realistic examples
- Check whether the right information is collected
- Review the user experience
- Confirm escalation and approval behaviour
- Compare the new journey with the current process
- Refine the scope before wider deployment

OUTPUT

Evidence that the digital worker improves the process and is worth taking further.

5. Deploy

Move from demo or proof of value towards a controlled live deployment.

ACTIVITIES

- Confirm production scope
- Confirm required data sources and systems
- Agree roles and responsibilities
- Prepare users and support teams
- Define monitoring and review points
- Launch with a controlled user group where appropriate

OUTPUT

A live or pilot digital worker supporting a real business process.

6. Scale

Turn the first success into a repeatable solution.

ACTIVITIES

- Review results and adoption
- Identify similar journeys
- Package reusable patterns
- Create industry or department accelerators
- Train customer teams
- Expand to additional channels or processes

OUTPUT

A reusable digital worker pattern that can grow beyond the first use case.

SECTION 3

First customer workshop

The first workshop should not be a technical architecture session. It should be a business process session. The goal is to agree one valuable journey that can become a demo or proof of value.

Suggested 90-minute agenda

1	Business goals and current pain	15 min
2	Current process walkthrough	20 min
3	User journey and pain points	15 min
4	Candidate digital worker journey	20 min
5	Success criteria and proof-of-value scope	15 min
6	Next steps and responsibilities	5 min



Who should attend

- Business process owner
- Operational team representative
- Customer or employee experience owner
- IT or systems representative
- Compliance or risk representative if needed
- Partner delivery lead



Workshop outputs

- Selected process
- Current pain points
- Required information
- Success criteria
- Target user journey
- Sample scenarios
- Approval and escalation needs
- Next-step plan

SECTION 4

Process discovery checklist

Use these questions to focus the first conversation on the real business journey.

- | | |
|--|---|
| ☒ What process are we improving? | ☒ Where do staff need to chase details? |
| ☒ Who uses the process? | ☒ Who approves decisions? |
| ☒ What triggers the process? | ☒ When should the process escalate to a person? |
| ☒ What information is needed at the start? | ☒ What systems or documents are involved? |
| ☒ What information is often missing? | ☒ What would a better journey look like? |
| ☒ Which steps are repetitive? | ☒ What would make the first version successful? |
| ☒ Where do users get stuck? | |



If the process cannot be explained simply, it is probably too broad for the first proof of value.

SECTION 5

Designing the guided digital worker

Design the digital worker from the user's point of view. The question is not "What can the technology do?" The question is "How should the user be guided to a better outcome?"



Main menu

Give users clear starting options instead of an empty chat box.



Right questions

Ask only for the information needed to move the process forward.



Clear choices

Make the next step obvious through simple choices, forms or prompts.



Business rules

Define what should happen automatically and what requires approval.



Human handover

Decide when a person should step in and what context they should receive.



Outcome summary

Show the user and the business what was done, what is pending and what happens next.

SECTION 6

AI control checklist

Customers need confidence that AI is helping the process, not running freely without boundaries.

- ✓ Where is AI allowed to help?
- ✓ Where must the process follow agreed steps?
- ✓ Which decisions need human approval?
- ✓ Which actions should never happen automatically?
- ✓ What should happen when the digital worker is uncertain?
- ✓ What should be recorded for review?
- ✓ What information should be shown before escalation?
- ✓ Who owns the final business decision?
- ✓ How will errors or exceptions be handled?
- ✓ How will the digital worker be improved after feedback?

✓ **AI should make the journey easier, but the business should remain in control.**

SECTION 7

Proof-of-value delivery

A proof of value should prove that the proposed digital worker makes a real process easier, faster or more controlled. It does not need to be a full production implementation.

- ✓ A good proof of value includes
- ✓ One business process
- ✓ One main user journey
- ✓ Realistic sample scenarios
- ✓ Clear before-and-after comparison
- ✓ A guided digital worker experience
- ✓ At least one control or approval point
- ✓ At least one escalation or handover example
- ✓ Clear success criteria
- ✓ A recommendation for next steps

- ⚠ A proof of value should avoid
 - Trying to integrate every system immediately
 - Solving every process variation
 - Replacing all human judgement
 - Overpromising full autonomy
 - Measuring success only by technical completion
 - Using unrealistic demo data

Explore Proof of Value →

SECTION 8

Acceptance testing

Acceptance testing should focus on whether the digital worker supports the business journey correctly, not only whether the screens work.

User journey

- Can the user understand what to do?
- Are the choices clear?
- Is the journey easier than the current process?

Information collection

- Does the digital worker collect the right information?
- Does it avoid unnecessary questions?
- Does it identify missing information?

Business control

- Are approval points clear?
- Are escalation rules working?
- Are boundaries respected?

Handover

- Does the human receive useful context?
- Is the summary clear?
- Does the person know what happened already?

Business outcome

- Is time saved?
- Are manual steps reduced?
- Is the process clearer?
- Is the customer or employee experience better?

SECTION 9

Go-live checklist

Confirm these before the first deployment.

- ✓ The process owner has approved the journey
- ✓ Success criteria are agreed
- ✓ User groups are defined
- ✓ Support ownership is clear
- ✓ Escalation routes are agreed
- ✓ Approval points are confirmed
- ✓ AI boundaries are agreed
- ✓ Sample scenarios have been tested
- ✓ Human handover has been tested
- ✓ Monitoring and feedback process is in place
- ✓ Rollback or pause plan exists
- ✓ Communication to users is prepared

⚠ For the first deployment, controlled rollout is usually better than launching to everyone at once.

SECTION 10

30/60/90-day adoption plan

A simple adoption rhythm for the first three months after go-live.

FIRST 30 DAYS

Stabilise

- Monitor usage
- Collect feedback
- Review escalations
- Fix confusing steps
- Check whether users understand the journey
- Confirm the digital worker is helping the process

DAYS 31-60

Improve

- Refine questions and choices
- Improve summaries
- Add missing scenarios
- Strengthen approval and escalation rules
- Identify additional value opportunities

DAYS 61-90

Expand

- Review business impact
- Package the digital worker as a repeatable pattern
- Identify similar processes
- Plan additional channels or departments
- Define the next digital worker opportunity

SECTION 11

What successful partners do

Patterns we see again and again in partners who turn first engagements into long-term success.



They lead with the process

They focus on the customer's business journey before talking about technology.



They show control

They make approvals, boundaries and human escalation visible.



They measure outcomes

They agree what success means before building too much.

They start small

They choose a focused use case that can prove value quickly.



They use realistic examples

They make demos and proof-of-value projects feel close to the customer's real work.



They package what works

They turn successful journeys into reusable industry or department solutions.

Ready to turn a demo into a successful first engagement?

Start with one business process, one user journey and one measurable outcome. Prove value first, then scale.

[Explore Proof of Value](#)

[Next: Market Greentic →](#)

Market Greentic

Marketing Greentic should not feel like another generic AI campaign. The strongest partner messaging focuses on real business processes, everyday operational pain and practical digital workers that help customers and employees get work done.



Greentic helps partners market practical AI-powered digital worker solutions that improve real business processes.

This page gives partners campaign themes, website messaging, LinkedIn ideas, email campaign examples, webinar concepts and case study structures they can adapt for their own market.

SECTION 1

Marketing principles

Six principles to keep partner marketing practical, credible and customer-led.



Lead with business pain

Start with the problems customers recognise: slow processes, repetitive admin, messy handovers, unclear approvals and AI experiments that do not become operational change.



Avoid generic AI hype

Do not position Greentic as just another AI tool. Show how it helps businesses turn AI into useful, controlled digital worker experiences.



Make it concrete

Use familiar examples such as customer service, HR onboarding, invoice approval, IT support and sales follow-up.



Show control and trust

Business leaders want AI benefits, but they also need approval points, boundaries, human escalation and accountability.



Promote proof of value

Encourage customers to start with one process, one guided journey and clear success criteria.



Package repeatable solutions

Partners should market repeatable digital worker offerings for specific departments, industries or business problems.

SECTION 2

Core marketing message

From AI experiments to guided digital workers.

Many organisations are experimenting with AI, but struggle to turn it into reliable day-to-day business improvement. Greentic helps partners create guided digital workers that support real processes, help users through clear steps, reduce repetitive work and keep the business in control.



Practical AI for operations

Move beyond demos and create digital workers that support everyday business journeys.



Guided experiences, not open-ended chat

Help users complete tasks through clear choices, questions, summaries, approvals and next steps.



AI with business control

Use AI to assist, understand and summarise, while keeping important decisions within agreed business boundaries.

SECTION 3

Campaign themes partners can use

Six ready-to-adapt themes for different audiences and business problems.



1. From AI experiments to operations

Turn AI pilots into practical digital workers that improve everyday work.

BEST FOR

Innovation leaders, transformation leaders and operations teams.

EXAMPLE HEADLINE

"Your AI demos are impressive. Now make them operational."

CTA

Start with one guided digital worker.



2. From forms and emails to guided journeys

Replace messy email chains, static forms and unclear handovers with guided digital worker experiences.

BEST FOR

Customer service, HR, finance, IT and shared services.

EXAMPLE HEADLINE

"Stop making people chase the process. Guide them through it."

CTA

See how a digital worker improves the journey.



3. AI with business control

Give AI a useful role inside agreed business processes, with clear boundaries, approvals and human escalation.

BEST FOR

Regulated industries, enterprise customers and risk-aware buyers.

EXAMPLE HEADLINE

"AI assistance without losing business control."

CTA

Explore controlled AI adoption.



4. Digital workers for customer service

Help customers get faster support while giving service teams better context for escalation.

BEST FOR

Customer service leaders and contact centre teams.

EXAMPLE HEADLINE

"Reduce repetitive support work without sacrificing service quality."

CTA

Build a customer service proof of value.



5. Digital workers for employee service

Help employees get answers, complete requests and follow internal processes more easily.

BEST FOR

HR, IT, operations and internal service teams.

EXAMPLE HEADLINE

"Make internal service easier for everyone."

CTA

Start with one employee journey.



6. From demo to proof of value

Start small with one process, realistic sample data and measurable business outcomes.

BEST FOR

Customers that want to explore AI safely before wider deployment.

EXAMPLE HEADLINE

"Prove the value of AI before scaling it."

CTA

Define your first proof of value.

SECTION 4

Partner website copy blocks

Drop-in headlines and supporting copy partners can adapt for their own websites.

HERO OPTION 1

Turn business processes into guided digital workers

We help organisations use Greentic to create practical AI-powered digital workers that guide customers and employees through real business journeys — with clear steps, better handovers and business control.

CTA

Explore digital worker opportunities

HERO OPTION 2

Practical AI for everyday business operations

Many AI projects stay at demo stage. We help you turn AI into guided digital workers that improve processes such as customer service, HR onboarding, invoice approval, IT support and sales follow-up.

CTA

Start with a proof of value

HERO OPTION 3

AI assistance with business control

Greentic-powered digital workers help users complete tasks faster while keeping important decisions, approvals and escalation points under business control.

CTA

See how it works



Short service description

We help organisations identify, design and deliver Greentic-powered digital workers for real business processes. We start with a focused proof of value, show measurable improvement and then expand successful journeys into repeatable solutions.



Partner value statement

As a Greentic partner, we help customers move beyond generic AI experiments towards practical digital workers that improve the way customers, employees and managers get work done.

SECTION 5

LinkedIn post ideas

Six copy-ready posts partners can publish or adapt.

1 AI experiments are not enough

Many organisations have impressive AI demos.

The harder question is:

How do you turn AI into something that improves everyday work?

That is where guided digital workers become interesting.

Instead of leaving users in an open-ended chat, a digital worker can guide them through clear steps, collect the right information, support approvals and hand over to a person when judgement is needed.

The opportunity is not just AI.

The opportunity is better business journeys.

2 Chatbots are only the start

Chatbots can answer questions.

But many business problems need more than an answer.

They need:

- the right information collected
- the next step explained
- a decision supported
- an approval requested
- a handover prepared

That is why we see digital workers as the next step for practical AI adoption.

3 AI with control

Business leaders want AI benefits.

They also want:

- clear boundaries
- approval points
- human escalation
- consistency
- accountability

The answer is not to let AI run freely through every business process.

4 Start small

The best AI automation project does not start by trying to transform everything.

It starts with one process.

One user journey.

One clear problem.

One measurable outcome.

That is how you move from AI excitement to operational value.

The answer is to give AI a controlled role inside guided business journeys.

5 From forms to guided journeys

Too many customer and employee journeys still depend on forms, email chains and manual chasing.

A guided digital worker can make the experience clearer:

- ask the right questions
- collect missing details
- show the next step
- prepare a summary
- escalate with context

That is a much better experience than asking people to find their way through the process alone.

6 Partner opportunity

The next wave of AI services will not only be about models.

It will be about helping businesses turn AI into repeatable operational solutions.

Partners who understand business processes, customer journeys and controlled AI adoption are well placed to lead that change.

SECTION 6

Email campaign examples

Three short email templates partners can adapt for outbound or nurture campaigns.



Email 1: From AI demo to business value

SUBJECT

"Could one process become your first AI digital worker?"

BODY

Many organisations are experimenting with AI, but the bigger opportunity is turning those experiments into practical business improvement.

We help teams use Greentic to create guided digital workers for processes such as customer service, HR onboarding, invoice approval, IT support and sales follow-up.

A good first step is a focused proof of value:

- one process
- one user journey
- realistic sample data
- clear success criteria

Would it be useful to explore which process in your organisation could be a good starting point?



Email 2: Reduce manual chasing

SUBJECT

"How much time does your team spend chasing missing information?"

BODY

Many routine requests arrive with missing details, unclear context or no obvious next step.

That creates manual chasing, slow handovers and unnecessary frustration for both users and staff.

Greentic-powered digital workers can guide users through clear steps, ask for the right information and prepare better handovers to your team.

We are helping organisations explore this through small proof-of-value projects focused on one process at a time.

Would you like to discuss a possible first use case?



Email 3: AI with business control

SUBJECT

"AI assistance without losing business control"

BODY

AI can help organisations move faster, but business leaders also need control, accountability and clear approval points.

Greentic helps create guided digital workers that use AI where it adds value, while keeping important business decisions within agreed boundaries.

This is especially useful for processes that need a mix of automation, user guidance, approval and human judgement.

Would it be worth exploring a controlled proof of value for one of your business processes?

SECTION 7

Webinar ideas

Three webinar concepts partners can host with prospects and customers.



Webinar 1: From AI experiments to operational digital workers

AUDIENCE

Business leaders, innovation teams and transformation leaders.

PROMISE

Learn how to move from AI pilots to guided digital workers that support real business processes.

SUGGESTED AGENDA

- Why AI demos often fail to become operations
- What a guided digital worker is
- Where to start
- Example use cases
- How to run a proof of value



Webinar 2: Beyond chatbots – guided AI for customer and employee journeys

AUDIENCE

Customer service, HR, IT and operations leaders.

PROMISE

See how guided digital workers can improve journeys that are currently handled through emails, forms, tickets and manual handovers.

SUGGESTED AGENDA

- Why chatbots are not enough
- How guided journeys improve experience
- Customer service and HR examples
- How AI can help without taking over
- First proof-of-value steps



Webinar 3: AI with business control

AUDIENCE

Enterprise, regulated industry and risk-aware buyers.

PROMISE

Explore how organisations can use AI inside business processes while keeping clear control, approval and escalation.

SUGGESTED AGENDA

- Why uncontrolled AI worries business leaders
- The role of business rules and approval points
- Human handover and accountability
- Example controlled digital worker journeys
- How to start safely

SECTION 8

Case study structure

Partners should write case studies around business improvement, not technology features.

1

Customer situation

What process was slow, manual or frustrating?

2

Business problem

What was the impact on customers, employees, managers or cost?

3

Digital worker journey

How did the guided digital worker improve the process?

4

Control and trust

How were approvals, boundaries and human escalation handled?

5

Results

What improved? Time saved, manual steps reduced, user experience improved, faster response, better handover or clearer decisions.

6

Next opportunity

What similar processes could now be improved?



Sample case study headline formats

- "How a customer service team reduced repetitive support work with a guided digital worker"
- "How HR improved onboarding journeys with AI assistance and business control"
- "How finance made invoice approvals clearer and faster"
- "How IT improved ticket routing and handover quality"

SECTION 9

Campaign landing page structure

A recommended flow for a partner campaign landing page.



Recommended flow

- 1 Headline focused on business pain
- 2 Short explanation of guided digital workers
- 3 Three business problems the audience recognises
- 4 Three outcomes the customer can achieve
- 5 Example use cases
- 6 Proof-of-value offer
- 7 Clear CTA



Example CTA options

- "Book a digital worker discovery call"
- "Explore your first proof of value"
- "See which process could be improved first"
- "Start with one guided journey"

SECTION 10

What to avoid

Common marketing missteps that weaken Greentic positioning.



Avoid generic AI claims

Do not say AI will transform everything. Show one practical process improvement.



Avoid overpromising autonomy

Do not imply AI will freely run critical business operations without boundaries.



Avoid technical jargon

Keep language focused on customer journeys, employee experience, manual work, approvals and business control.



Avoid feature lists without business value

Every feature should connect to a business outcome.



Avoid making it sound like just another chatbot

Emphasise guided journeys, process improvement and better handover.



Avoid downloadable-only content

Make useful content visible directly on the site, so partners and customers can browse it easily.



Ready to create demand for your first Greentic opportunity?

Start with one practical campaign, one audience and one business process that customers immediately recognise.

 Explore Use Cases

Next: Grow with Greentic →

Grow with Greentic

Greentic gives partners a way to build a practical AI services business around guided digital workers. The strongest partners do not stop at one demo. They learn which business journeys create value, package what works and build repeatable solutions for customers, departments and industries.



This page explains how partners can grow from first opportunity to trusted delivery partner, solution builder and long-term customer advisor.

SECTION 1

The partner growth journey

A staged path from first learning to a scalable Greentic-powered services business.

Learn



Demo



Prove



Deliver



Package



Scale



STAGE 1 Learn

Understand Greentic, digital workers, guided journeys and AI with business control.

PARTNER FOCUS

- Learn the core story
- Understand where Greentic fits
- Identify good first use cases
- Practise explaining the value in business language

Outcome: The partner can confidently explain Greentic to a customer.



STAGE 2 Demo

Use focused demos to show how a manual process can become a guided digital worker.

PARTNER FOCUS

- Choose a recognisable business process
- Use realistic sample data
- Show the before-and-after journey
- Demonstrate control, handover and measurable value

Outcome: The customer can see how Greentic could apply to their own business.



STAGE 3 Prove

Run a small proof of value around one process and one user journey.

PARTNER FOCUS

- Define success criteria
- Agree scope
- Validate the guided journey
- Show whether the process becomes easier, faster or more controlled

Outcome: The customer has evidence that the approach is worth taking further.



STAGE 4 Deliver

Move from proof of value to a controlled deployment.

PARTNER FOCUS

- Confirm production scope
- Prepare users
- Agree support model
- Monitor adoption
- Improve the journey based on feedback

Outcome: The customer has a working digital worker improving a real process.



STAGE 5 Package

Turn successful work into a reusable solution pattern.

PARTNER FOCUS

- Capture repeatable process steps
- Reuse demo stories, proof-of-value templates and delivery checklists
- Create department or industry-specific offers
- Define what can be sold again

Outcome: The partner has a repeatable offering, not just a one-off project.



STAGE 6 Scale

Expand across more processes, departments, channels and customers.

PARTNER FOCUS

- Identify similar journeys
- Build customer expansion plans
- Create industry campaigns
- Train more sales and delivery people
- Build a pipeline of repeatable digital worker opportunities

Outcome: The partner builds a scalable Greentic-powered services business.

SECTION 2

Different ways partners can grow

Partners can grow in different directions depending on their strengths, customers and ambitions.



Referral partner

For partners who identify opportunities and introduce customers.

BEST FIT

- Business networks
- Advisors
- Consultants
- Industry specialists

Growth path: Start by identifying customers with manual process pain, then progress into discovery and proof-of-value conversations.



Sales partner

For partners who actively position Greentic-powered digital workers to customers.

BEST FIT

- Technology resellers
- Consultancies
- Business transformation firms
- Automation specialists

Growth path: Build repeatable sales motions around use cases such as customer service, HR, finance, IT and sales.



Delivery partner

For partners who design and deliver customer digital worker projects.

BEST FIT

- Implementation partners
- System integrators
- Process improvement consultants
- Managed service providers

Growth path: Build delivery capability, reusable templates, proof-of-value methods and customer success practices.



Industry solution partner

For partners who package digital worker solutions for a specific industry.

BEST FIT

- Banking specialists
- Insurance specialists
- Healthcare specialists
- Manufacturing specialists
- Public sector specialists
- Legal and compliance specialists

Growth path: Turn repeated customer needs into industry-specific offers with recognisable processes, language and outcomes.



Managed service partner

For partners who support and improve digital workers over time.

BEST FIT

- Managed service providers
- Operations partners
- Customer support providers
- IT service partners

Growth path: Offer ongoing monitoring, improvement, support, reporting and expansion services.

SECTION 3

From one project to repeatable offers

The biggest partner opportunity is not only delivering one digital worker. It is learning which journeys create value, standardising the approach and turning those journeys into repeatable offers.

One demo → One proof of value → One deployment → One reusable solution → Many customers



Customer Service Starter

A focused offer to improve common support journeys, reduce repetitive questions and prepare better handovers to service teams.



HR Onboarding Starter

A guided employee onboarding offer that helps new starters, managers and HR teams complete common onboarding steps more easily.



Finance Approval Starter

A finance-focused offer for invoice review, exception handling, approval preparation and decision tracking.



IT Support Starter

A guided IT request offer that helps users provide the right details, routes issues more clearly and improves handover quality.



Sales Follow-Up Starter

A sales support offer that helps qualify leads, prepare next actions and improve follow-up consistency.



Compliance Journey Starter

A guided compliance offer that helps users follow required steps, collect evidence and escalate exceptions.

SECTION 4

How to expand inside a customer

Once a first digital worker proves value, partners should look for similar journeys where the same approach can help another team, department or process.



Expand by department

Move from one team to another: customer service, HR, IT, finance, sales, operations or compliance.



Expand by process

Take the same digital worker approach to another repeated journey with similar manual pain.



Expand by channel

Start in one channel, then support additional channels where customers or employees already work.



Expand by user group

Begin with a small user group, then expand to more teams, regions or customer segments.



Expand by complexity

Start with a guided journey using sample or simple data, then add more real business data, approvals and system actions over time.



Expand by reporting

Use adoption, feedback and process results to identify where the next improvement should happen.

SECTION 5

Building partner capability

Strong partners invest in the people, skills and practices that make growth repeatable.



Sales capability

Partners need people who can explain Greentic in business language, qualify opportunities and lead first customer conversations.

SKILLS TO BUILD

- Pitching digital workers
- Identifying good first use cases
- Handling objections
- Proposing proof-of-value projects



Democapability

Partners need the ability to show realistic guided journeys that customers recognise.

SKILLS TO BUILD

- Demo storytelling
- Using sample data
- Showing control and escalation
- Connecting the demo to business outcomes



Delivery capability

Partners need a repeatable way to deliver first engagements successfully.

SKILLS TO BUILD

- Process discovery
- Journey design
- Proof-of-value scoping



Industry capability

Partners can grow faster when they understand the language, pain points and processes of a specific industry.

SKILLS TO BUILD

- Industry messaging
- Use-case packaging

- Acceptance testing
- Customer adoption planning

- Compliance awareness
- Sector-specific proof-of-value ideas



Customer success capability

Partners can create long-term value by helping customers improve and expand digital workers after launch.

SKILLS TO BUILD

- Adoption tracking
- Feedback review
- Improvement planning
- Expansion mapping

SECTION 6

Suggested partner certification path

A partner development path that grows with capability. Use this as a guide for team readiness, not a formal qualification.



Greentic Sales Ready

Focus: Confidently explain Greentic, identify customer pain and qualify first opportunities.

TYPICAL EVIDENCE

- Can explain digital workers in plain business language
- Can position Greentic against chatbots, RPA and pure autonomous AI
- Can run discovery questions
- Can propose a first proof of value



Greentic Demo Ready

Focus: Run a focused demo that shows a real business journey.

TYPICAL EVIDENCE

- Can tell the before-and-after story
- Can use realistic sample data
- Can show user guidance, control and handover
- Can connect the demo to measurable outcomes



Greentic Delivery Ready

Focus: Deliver a first proof of value or pilot successfully.

TYPICAL EVIDENCE

- Can run a first workshop
- Can define scope and success criteria
- Can design a guided journey
- Can test the journey with realistic examples
- Can support controlled rollout



Greentic Solution Builder

Focus: Package repeatable digital worker offers for departments or industries.

TYPICAL EVIDENCE

- Has identified repeatable use cases
- Has reusable messaging and demo assets
- Has a proof-of-value template
- Has a delivery checklist
- Has a customer expansion path

SECTION 7

How partners can measure growth

The metrics that show a Greentic practice is becoming repeatable and scalable.



Pipeline created

How many qualified digital worker opportunities are identified?



Demos delivered

How many customer demos are run with a clear next step?



Proofs of value started

How many focused proof-of-value projects are launched?



Proofs of value converted

How many proof-of-value projects become pilots or deployments?



Repeatable offers created

How many reusable department or industry solutions are packaged?



Customer expansion

How many customers expand from one digital worker to additional journeys?



Customer outcomes

What time, effort, experience or control improvements are customers seeing?



Partner capability

How many team members can sell, demo, deliver or support Greentic-powered solutions?

SECTION 8

90-day partner growth plan

A practical three-step plan to move from learning to a repeatable growth motion.



FIRST 30 DAYS

Learn and position

- Understand the core Greentic story
- Choose target customer segments
- Select two or three first use cases
- Prepare first sales messaging
- Practise the demo story
- Identify initial customer opportunities

Outcome: Partner is ready to start customer conversations.



DAYS 31-60

Demo and prove

- Run first customer discovery calls
- Deliver focused demos
- Select proof-of-value candidates
- Define success criteria
- Build first repeatable workshop and proposal templates
- Capture customer feedback

Outcome: Partner has active proof-of-value opportunities.



DAYS 61-90

Package and scale

- Review first results
- Package the strongest use case
- Create campaign messaging
- Train additional team members
- Build an expansion plan for early customers
- Define the next set of target accounts

Outcome: Partner has the foundation for a repeatable Greentic growth motion.

SECTION 9

What successful partners avoid

Common missteps that slow growth and weaken customer trust.



Selling generic AI

Customers hear generic AI messages every day. Successful partners sell practical business improvement.



Starting too broad

Trying to automate everything at once makes delivery harder and value less clear.



Hiding the business case

Every demo and proof of value should connect to a business outcome.



Overpromising autonomy

Partners should not imply that AI will freely run critical operations without control.



Treating every project as unique

Successful partners look for patterns they can reuse.



Forgetting customer success

Growth depends on adoption, feedback, improvement and expansion after the first deployment.



Greentic gives partners a way to build a practical AI business around repeatable digital worker solutions.

Start with one valuable journey, prove the impact, package what works and expand from there.



Ready to grow from first opportunity to repeatable solution?

Start with one business journey, prove value quickly and build a partner offering customers can understand, trust and expand.



Explore Use Cases

Explore Proof of Value →



Admin Guides

Manage partnerships, tenants, branding, domains, access and reusable platform resources.

Explore Admin Guides →



Designer Guides

Create agentic workers, deterministic flows, adaptive experiences, integrations and deployable solutions.

Explore Designer Guides →

Admin Guides

View all →



Getting started

Understand partnerships, tenants and the recommended setup journey for a new customer.

Open guide →



Manage your partnership

Review partnership details, manage member tenants and administrators, and configure shared defaults.

Open guide →



Create and manage tenants

Create customer environments, choose plans, manage status and open tenant configuration.

Open guide →



Branding

Apply partnership and tenant logos, colours, themes and identities.

Open guide →



Deployment environments

Configure Greentic-hosted or bring-your-own-cloud deployment targets and environments.

Open guide →



Access and sign-in

Manage password login, SSO, users, teams, roles, domains and provisioning.

Open guide →



AI and tools

Connect AI providers, OAuth apps, extensions, MCP servers and external tools.

Open guide →



Guardrails

Configure policies, review enforcement and understand violations.

Open guide →



Billing, credits and usage

Review balances, consumption, estimated spend, usage statements and wallet settings.

Open guide →

Designer Guides

View all →



Getting started

Understand the Designer workspace and create your first solution.

[Open guide](#) →

Agentic workers

Create, configure, connect and test specialised digital workers.

[Open guide](#) →



Flows

Build deterministic business processes with steps, decisions and actions.

[Open guide](#) →



Adaptive cards

Build interactive interfaces for collecting information and guiding users.

[Open guide](#) →



Knowledge

Add documents, structured knowledge and trusted business context.

[Open guide](#) →



Integrations and providers

Connect APIs, MCP capabilities, messaging channels and external systems.

[Open guide](#) →



Testing and troubleshooting

Preview solutions, inspect executions and diagnose problems.

[Open guide](#) →



Publishing and deployment

Package, publish, deploy, update and manage live solutions.

[Open guide](#) →

 These guides are for partnership administrators who create and manage tenants through the Greentic Admin platform.



Getting started

Understand partnerships, tenants and the recommended setup journey for a new customer.

[Open guide](#) →



Manage your partnership

Review partnership details, manage member tenants and administrators, and configure shared defaults.

[Open guide](#) →



Create and manage tenants

Create customer environments, choose plans, manage status and open tenant configuration.

[Open guide](#) →



Branding

Apply partnership and tenant logos, colours, themes and identities.

[Open guide](#) →



Deployment environments

Configure Greentic-hosted or bring-your-own-cloud deployment targets and environments.

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Configure policies, review enforcement and understand violations.

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Billing, credits and usage

Review balances, consumption, estimated spend, usage statements and wallet settings.

[Open guide](#) →

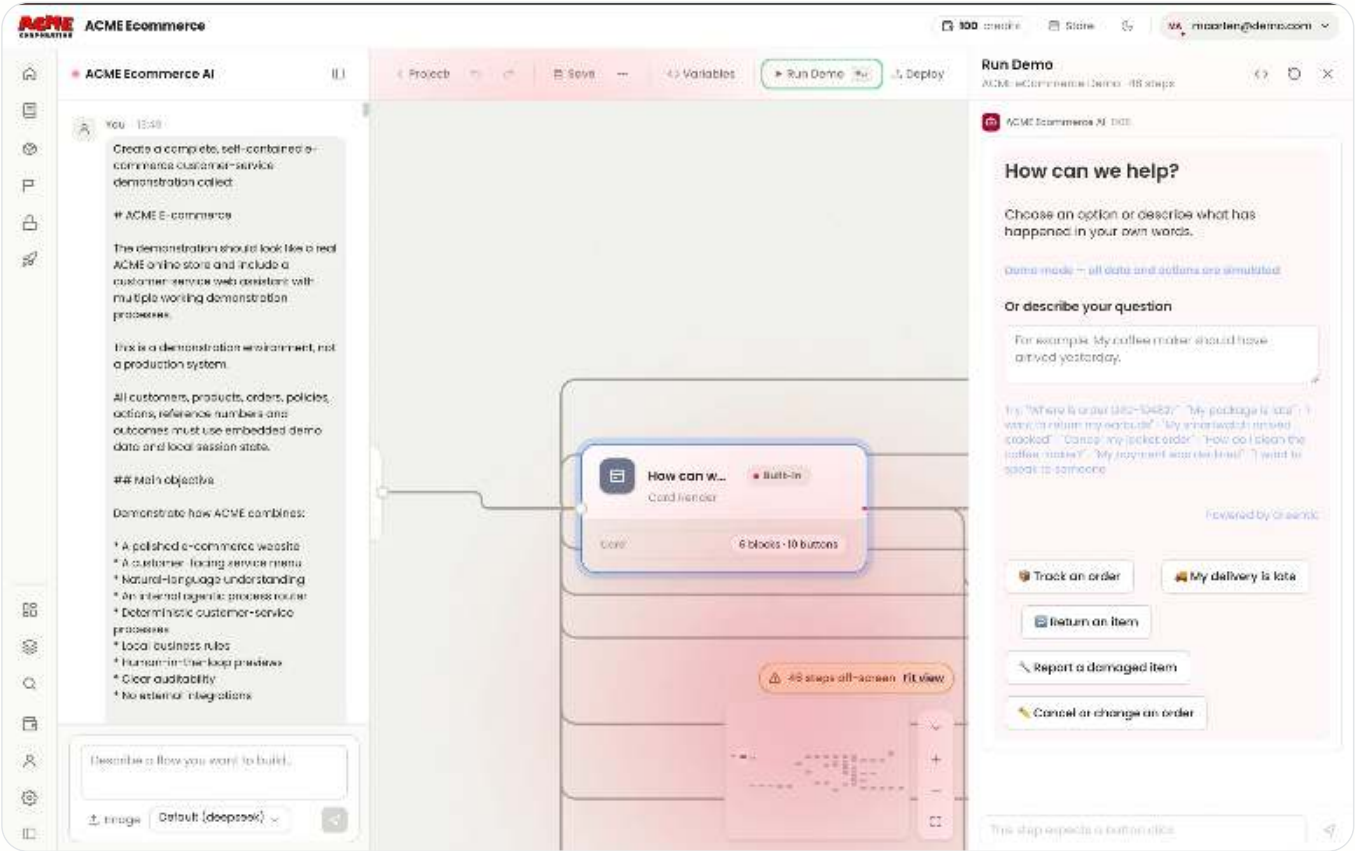
[Explore Designer Guides](#) →

From business requirement to working solution

Greentic Designer brings AI-assisted design, deterministic process orchestration, testing and deployment into one workspace. Describe what the business needs, inspect what was generated and keep control of every process before it goes live.

Start with Getting started →

Explore all Designer guides



Design, inspect and test a complete process without leaving the Editor.



AI understands. Flows control.

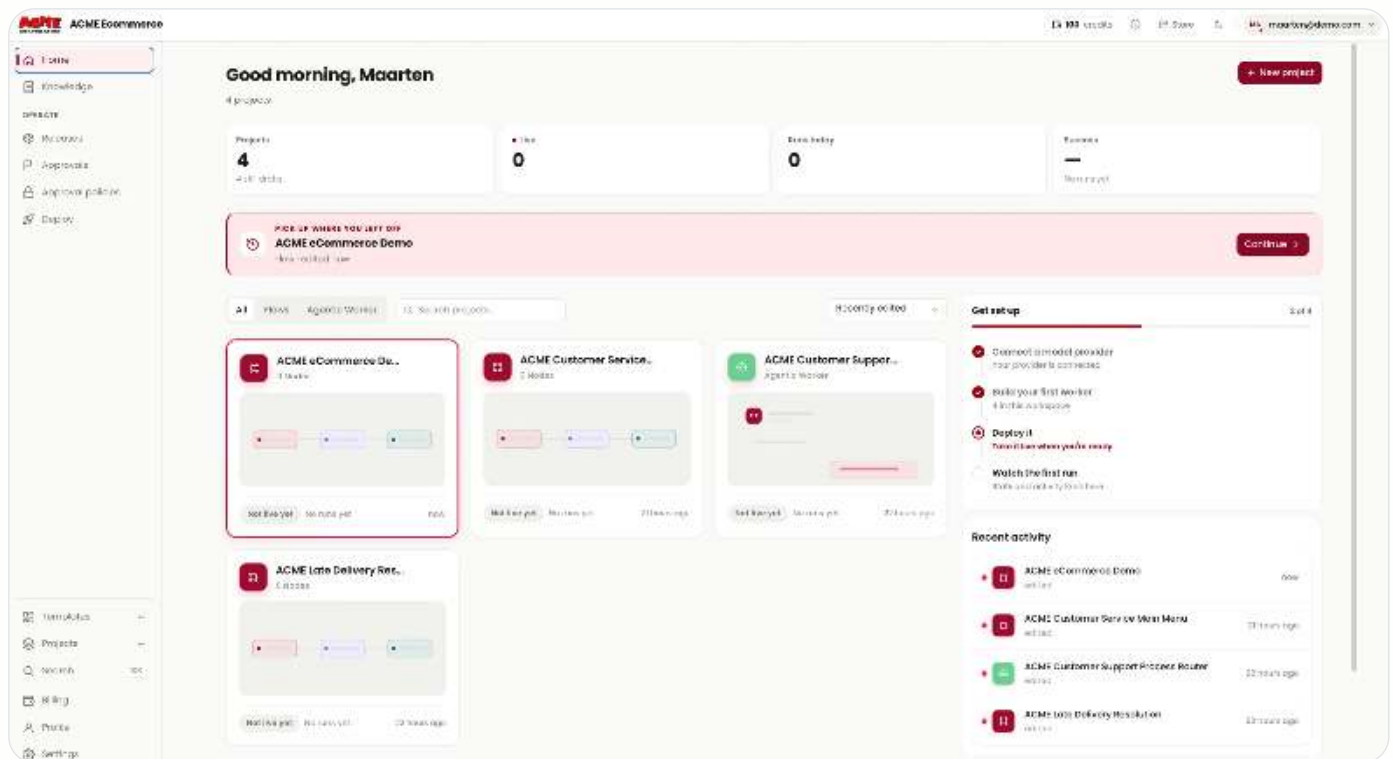
Agentic workers can interpret open requests, classify intent and choose an appropriate capability. Deterministic flows control data collection, decisions, approvals, system actions and approved outcomes.

From prompt to production

Every Greentic solution moves through the same five stages, whatever it automates.

STAGE 1 Describe Explain the business goal in plain language.	STAGE 2 Build Generate a flow or specialised agentic worker.
STAGE 3 Connect Add knowledge, tools, models and reusable capabilities.	STAGE 4 Test Preview the experience and correct issues before release.
STAGE 5 Ship Version, approve, publish and deploy the solution.	

One workspace for the complete lifecycle



Designer Home brings projects, setup progress, activity and operational navigation into one workspace.

Home

View projects, continue recent work and monitor workspace setup.

Knowledge

Create and manage trusted sources that workers can answer from.

Releases

Review packaged or published solution releases.

Approvals

Review work that is waiting for human approval.

Approval policies

Control who can approve actions and how escalation behaves.

Deploy

Connect channels and workers in a deployment environment.

Recommended learning path

Work through the guides in this order to move from a first project to a deployed customer solution.

1 START



START

Getting started

Understand the workspace, choose a project type and create your first solution.

[Open guide](#) →

2 BUILD



BUILD

Agentic workers

Create specialised workers that interpret requests and use approved capabilities.

[Open guide](#) →



BUILD

Flows

Build deterministic business processes using steps, decisions and actions.

[Open guide](#) →



BUILD

Adaptive cards

Create structured interfaces for presenting information and collecting input.

[Open guide](#) →

3 GROUND AND CONNECT



GROUND AND CONNECT

Knowledge

Give workers access to approved documents and trusted business context.

[Open guide](#) →



GROUND AND CONNECT

Integrations and providers

Use configured models, tools, flows, APIs and external capabilities.

[Open guide](#) →

4 TEST AND SHIP



TEST AND SHIP

Testing and troubleshooting

Preview solutions, identify configuration problems and confirm expected behaviour.

[Open guide](#) →



TEST AND SHIP

Publishing and deployment

Version, approve, publish and deploy completed solutions.

[Open guide](#) →

[Explore Admin Guides](#) →

Choose where to begin

Start with a flow

Choose a flow when the business process must follow explicit steps, branches, validations, approvals or controlled outcomes.

EXAMPLES

- Customer onboarding
- Claims handling
- Quote creation
- Order resolution
- Compliance checks

Start with an agentic worker

Choose an agentic worker when the solution must interpret open language, classify requests, search approved knowledge or choose between permitted capabilities.

EXAMPLES

- Intent routing
- Internal assistance
- Customer question handling
- Knowledge-based support
- Coordinating approved tools

Many complete solutions combine both: an agentic worker understands the request and a deterministic flow executes the controlled business process.

Scope: workspace

ⓘ Designer works within the selected workspace

Projects, knowledge, configured models, credits and deployment resources belong to the active workspace. Confirm the workspace before creating or changing a customer solution.

On this page

Before you begin

☒ Confirm that you can access the correct Designer workspace.

☒ Confirm that you have the role required to create the intended project type.

☒ Make sure a model provider is available before relying on AI-assisted generation.

☒ Prepare a concise description of the business requirement.

☒ Decide whether the requirement is best represented as a deterministic flow or an agentic worker.

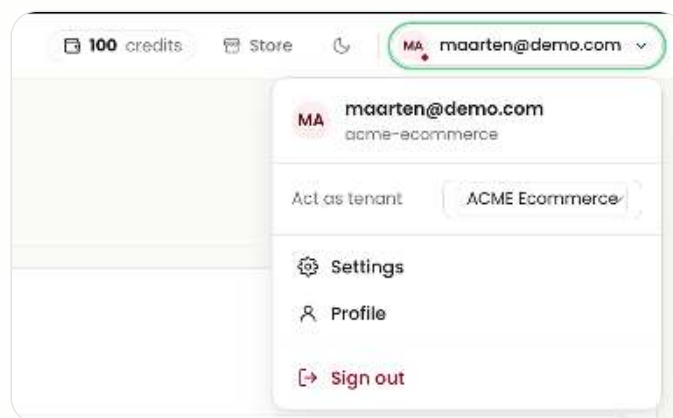
☒ Use fictional or test data while building the first version.

ⓘ Start with one clear business outcome

A narrowly defined first process is easier to generate, inspect and test than a broad request to automate an entire department.

1. Choose the correct workspace

Designer always acts within one workspace. Confirm which one is active before you begin.



Use the account menu to confirm or change the workspace you are acting within.

- The account menu shows the signed-in user.
- **Act as tenant** or the equivalent workspace selector identifies the active customer workspace.
- Settings and Profile are personal or workspace support areas, not project design controls.
- Changing the active workspace changes the projects and resources available in Designer.

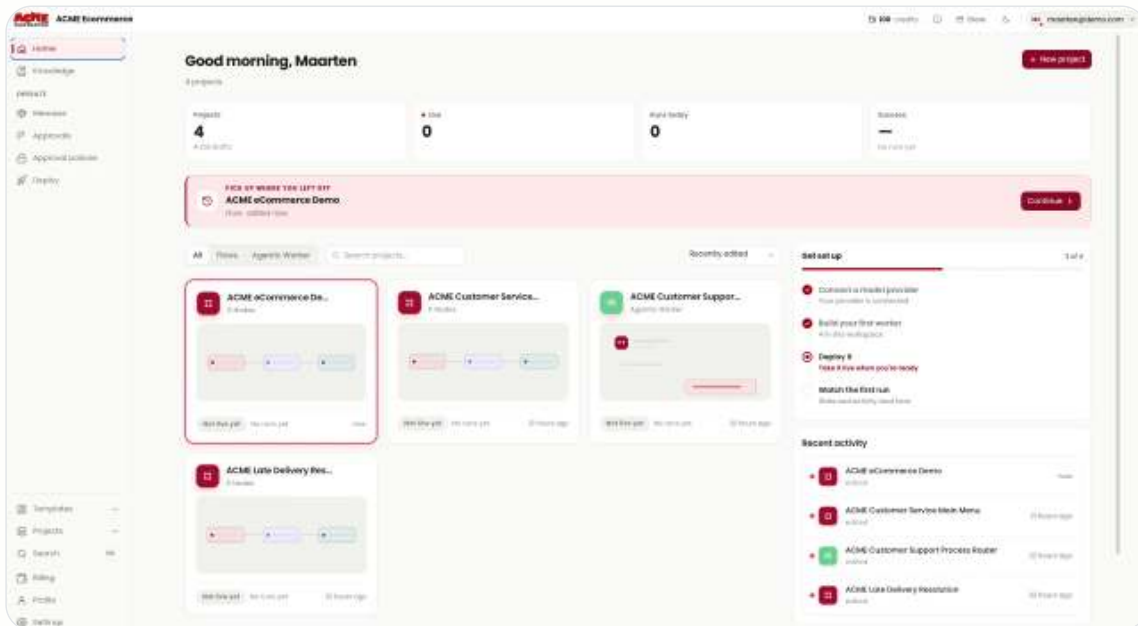
- 1 Open the account menu in the upper-right corner.
- 2 Review the active workspace.
- 3 Change it when you are working for another customer or tenant.
- 4 Confirm that the workspace branding and project list are correct.

ⓘ Check before making changes

A project created in the wrong workspace may use the wrong models, tools, knowledge, branding or deployment resources.

2. Understand Designer Home

Home is the starting point for every project in the workspace.



Designer Home shows the workspace's projects, setup progress and recent activity.

Workspace summary

The top cards summarise the number of projects, live projects, runs today and success information when runs exist. Treat the values shown as examples only.

Pick up where you left off

The continuation banner opens the most recently edited project.

Project cards

Each card shows the project name, project type, draft or live state, recent run information and the last-edited time.

Filters and search

Show all projects, limit the view to flows or agentic workers, search by project name and change project ordering.

Get set up

The setup checklist highlights workspace prerequisites such as connecting a model provider, creating a first worker, deploying it and observing a run.

Recent activity

Shows the projects that were changed most recently.

ⓘ Use clear project names

Name projects after their business purpose, not after temporary experiments. For example, use "Late Delivery Resolution" rather than "Test Flow 3".

3. Create a new project

The New Project dialog asks for a name and the kind of solution you want to build.

New Project
Name your project and choose how you want to build it.

PROJECT NAME
Support ticket router

WHAT DO YOU WANT TO BUILD?

- Flow** (selected)
Visual graph of steps — triggers, AI, web requests, output cards.
- Agentic Worker
Build an Agentic Worker — describe the goal, pick channels, and package it.
- SoRLa Studio **COMING SOON**
Answer a short set of guided questions to auto-build and deploy a worker.
- Playbook
Author a reusable procedure — instructions, tools, guardrails — your agentic workers can run.
- Import a flow or pack
Load a package, yaml, or json flow.
- Import from GitHub
Browse a connected repository.

You can rename or duplicate it later. Go to events Cancel Create

Choose Flow for a controlled visual process made from explicit steps.

New Project
Name your project and choose how you want to build it.

PROJECT NAME
Sample Agentic Worker

WHAT DO YOU WANT TO BUILD?

- Flow
Visual graph of steps — triggers, AI, web requests, output cards.
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Load a package, yaml, or json flow.
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Browse a connected repository.

You can rename or duplicate it later. Go to events Cancel Create

Choose Agentic Worker for a specialised AI worker that interprets requests and uses approved capabilities.

OPTION	USE IT FOR
Flow	Visual deterministic processes containing triggers, decisions, AI steps, requests and output cards
Agentic Worker	A specialised worker defined by a goal, behaviour, model, tools and safety settings
Playbook	A reusable procedure containing instructions, tools and guardrails that workers can run
Import a flow or pack	Load an existing supported Greentic package or flow file
Import from GitHub	Browse a connected repository and import supported content

SoRLa Studio is marked Coming soon in the current interface and should not be presented as an available creation option.

- 1 Select New project from Designer Home.
- 2 Enter a concise project name.
- 3 Select the project type.
- 4 Review the description beneath the selected type.
- 5 Select Create.
- 6 Describe the intended business outcome when the project studio opens.
- 7 Review the generated configuration or canvas before testing it.

Flow or Agentic Worker?

Use a flow when sequence and outcomes must be explicitly controlled. Use an agentic worker when natural-language understanding or flexible capability selection is required.

4. Start from a template

Templates give you a reviewed starting point instead of an empty canvas.



Templates provide reusable starting points that can be searched and filtered.

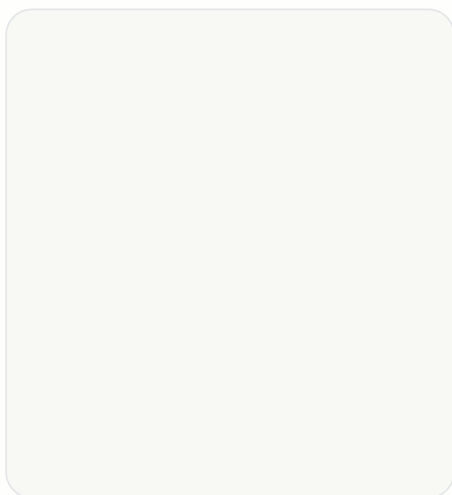
- Open Templates from the left navigation.
- Search by template name or description.
- Use filters and ordering controls to narrow the results.
- Open a template to review what it provides before using it.
- Use a template as a starting point and then adapt it to the customer requirement.
- Where the interface allows it, a completed canvas can be published as a reusable template.

 Treat templates as starting points

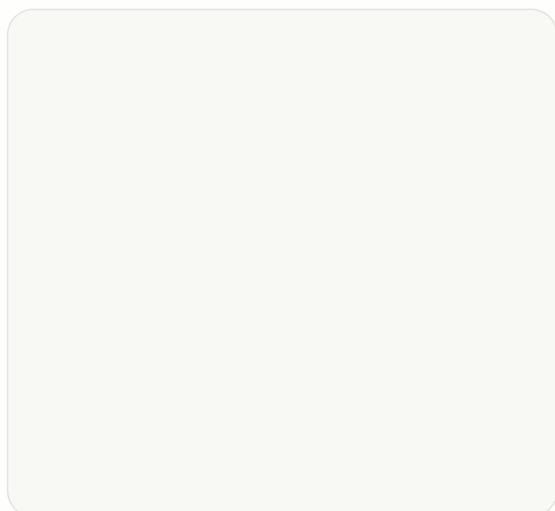
Review generated steps, instructions, tools and assumptions before using a template in a customer solution.

5. Move between projects

Two navigation methods make it quick to move around a busy workspace.



The Projects menu provides quick access to recently available projects and a New action.



The command palette provides keyboard-driven access to navigation and common actions.

Projects menu

Open the Projects control in the left navigation, select a project directly, or use New to begin

Command palette

Open Search or use the displayed keyboard shortcut, type part of a command or destination,

another project.

move through results with the keyboard and select the required command.

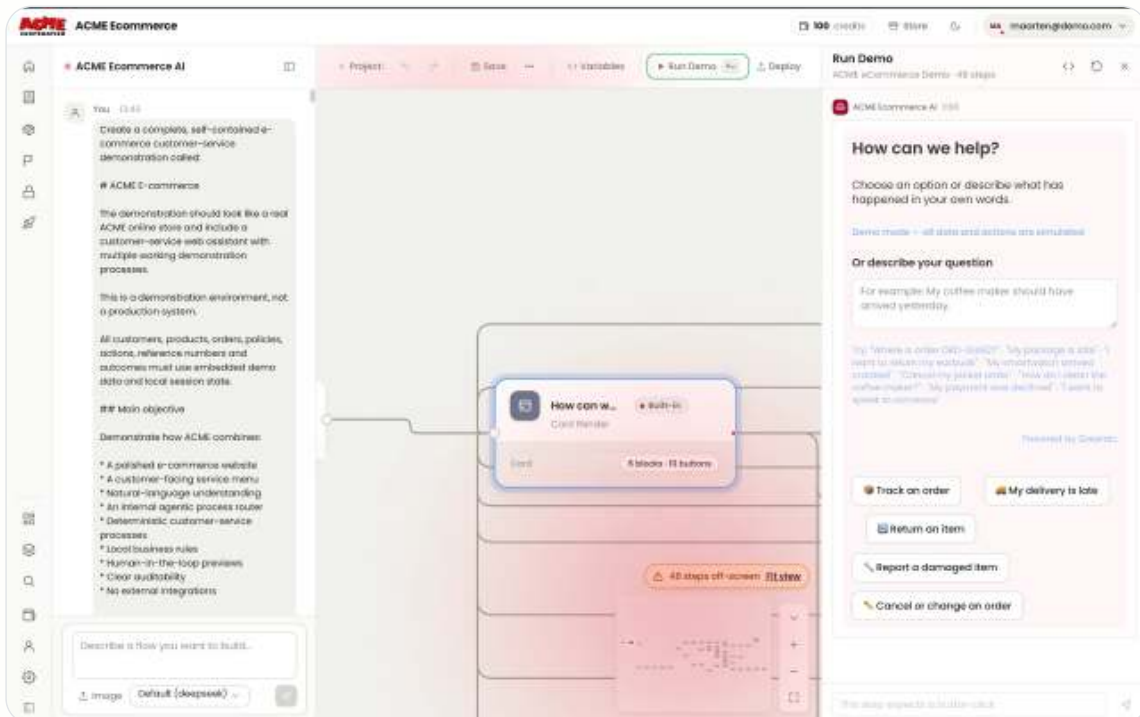
The commands visible in the screenshot are examples of the currently available interface rather than a complete command reference.

Use the command palette for speed

It is particularly useful when moving repeatedly between the Editor, Dashboard, Templates and deployment areas.

6. Understand the Editor workspace

The Editor is where a solution is designed, inspected and tested.



The Editor combines AI-assisted design, a visual canvas and an interactive Run Demo panel.

AI design conversation

The left panel is used to describe what should be created or changed. It also records the design conversation.

Visual canvas

The centre shows the generated process and its connections. Select a step to inspect and configure it.

Project controls

The top bar includes controls such as Save, Variables, Run Demo, Deploy and additional project actions.

Run Demo

The right panel displays the interactive test experience for the current project.

Canvas navigation

Large projects may extend beyond the visible area. Use Fit view, zoom controls, the minimap and canvas navigation.

Generated is not the same as finished

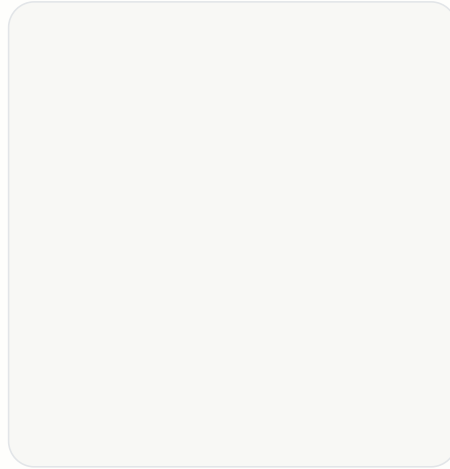
Review the generated canvas, inspect important steps and test all significant routes before publishing or deployment.

1 Make one purposeful change at a time

Small, explicit follow-up prompts are easier to verify than asking Designer to restructure many unrelated parts of a solution at once.

7. Save, version, import and export

The project menu holds the actions that protect and move your work.



The project menu provides versioning, layout, import and export actions.

Version history

Review versions available for the project.

Save as version

Record the current state as a project version.

Auto-layout

Rearrange the visual canvas automatically.

Import flow

Bring a supported flow into the current project workflow.

Export flow

Export the flow using the supported local format.

Export to GitHub

Send supported project content to a connected GitHub destination.

The menu shows the available action names, but the exact import format, export format and GitHub workflow depend on the current Designer configuration.

- 1 Make the intended project changes.
- 2 Select Save.
- 3 Run the project or worker using the available test control.
- 4 Correct any obvious configuration issue.
- 5 Open the project actions menu.
- 6 Select Save as version.
- 7 Give the version a meaningful description where the interface requests one.
- 8 Continue editing in the draft after the version has been recorded.

1 Save a version before major changes

Create a meaningful version before restructuring a large canvas, replacing a model or changing important worker instructions.

8. First-project checklist

Work through this list before moving on to a build guide.

☒ Confirm the correct workspace.

☒ Choose Flow or Agentic Worker.

☒ Describe one specific outcome.

☒ Check important inputs, decisions and outputs.

☒ Save the draft.

☒ Continue to the relevant build guide.

☒ Confirm that the required model provider is available.

☒ Give the project a clear business name.

☒ Inspect what Designer creates.

☒ Run a representative test.

☒ Save a meaningful version.

Building a worker?
Create specialised workers that interpret requests and use approved capabilities.

Open Agentic workers →

Building a process?
Build deterministic business processes using steps, decisions and actions.

Open Flows →

Troubleshooting at a glance

Common first-project problems and where to look.

PROBLEM	LIKELY CAUSE	ACTION
The expected projects are missing	The wrong workspace is active or a filter is applied	Confirm the workspace, clear search and select All projects
New project options are unavailable	The user may lack the required Designer role	Ask the workspace administrator to review the user's capability access
AI-assisted generation cannot start	No suitable model provider or credential is available	Confirm the workspace setup and configured provider
Import from GitHub cannot be used	GitHub is not connected or the required access is unavailable	Review the workspace connection with the administrator
Most of the flow appears off-screen	The generated process is larger than the current viewport	Use Fit view, zoom controls or the minimap
The demo does not behave as expected	The generated canvas or configuration has not been fully reviewed	Inspect the relevant steps, variables and connections, then run the test again
A recent change should be preserved	The draft has not yet been recorded as a version	Save the project and use Save as version
A command is difficult to find	It may be available through Search or the command palette	Open the command palette and search by action name



Give the worker one clear responsibility

An agentic worker performs best when it has a specific goal, explicit boundaries and a controlled set of capabilities. Use deterministic flows to execute business processes that require fixed steps, approvals or guaranteed outcomes.

What is an agentic worker?

An agentic worker uses an AI model to interpret information and decide how to respond within the instructions and capabilities you provide.

☒ An identity and worker type

☒ Business-specific instructions

☒ A model and credential

☒ Extension tools and reusable flows

☒ Guardrails

☒ Short-term or long-term memory

☒ Knowledge bases

☒ Execution limits

 **Capabilities are granted, not assumed**

An agentic worker does not automatically have access to every model, tool, flow or data source in the workspace. The designer selects which capabilities it may use.

Agentic worker versus deterministic flow

USE AN AGENTIC WORKER WHEN	USE A DETERMINISTIC FLOW WHEN
The input is open natural language	The process must follow explicit steps
The intent must be interpreted	Decisions must follow fixed business rules
The worker must choose between approved capabilities	Inputs, validations and outcomes must be controlled
A flexible response is acceptable	The same inputs must reliably follow the same path
Knowledge retrieval or limited tool selection is needed	Approvals, transactions or compliance steps are involved

Many Greentic solutions combine both. An agentic worker understands the request, while a deterministic flow performs the controlled business process.

The example used throughout this guide

ACME, the project names, model names and all test values are fictional demonstration data.

Worker
ACME Support Process Router.

Purpose
Classify an open-text customer-service request and return structured routing data.

Called by
ACME Customer Service Main Menu.

Possible outcome
Route a late-delivery request to ACME Late Delivery Resolution.

Customer enters an open question
↓
Customer Service Main Menu flow
↓
ACME Support Process Router
↓
Structured intent result
↓
Deterministic resolution flow

ⓘ The router interprets; it does not resolve

In this example, the agentic worker identifies the likely customer-service process. The deterministic flow collects data, applies rules and presents the approved resolution. Structured JSON is the design choice used by this example because a downstream flow needs a predictable routing result — it is not required of every worker.

On this page

Before you begin

☒ Confirm that the correct workspace is active.

☒ Define one specific responsibility for the worker.

☒ Decide what the worker must never do.

☒ Identify the expected input and output.

☒ Confirm that a suitable model credential is available.

☒ Identify any tools, flows or knowledge bases the worker requires.

☒ Decide whether the worker needs memory.

☒ Prepare representative test messages.

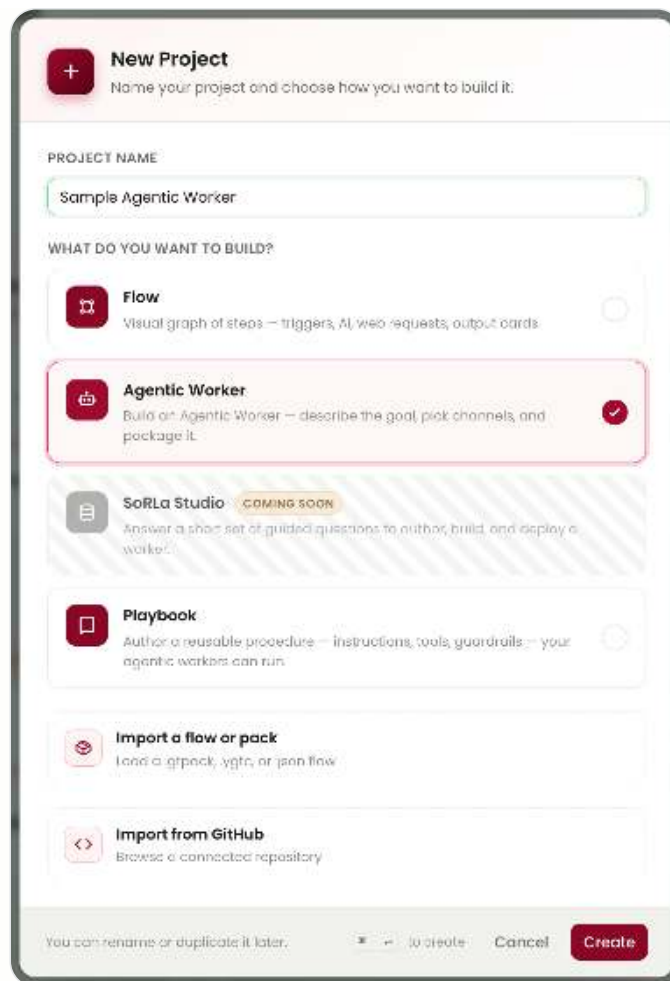
☒ Use fictional data during design and testing.

ⓘ Write the expected output before building

For a router or classifier, define the fields the downstream flow needs before writing the worker instructions. This makes testing and integration much easier.

1. Create an Agentic Worker project

Start from Designer Home and choose the Agentic Worker project type.



Create a new project and select Agentic Worker as the project type.

- 1 Open Designer Home.
- 2 Select New project.
- 3 Enter a clear project name.
- 4 Select Agentic Worker.
- 5 Review the project-type description.
- 6 Select Create.
- 7 Wait for Agentic Worker Studio to open.

The New Project dialog also offers other project types, including flows, playbooks and imports. This guide covers only Agentic Worker. SoRLa Studio is shown in the dialog as Coming soon.

2. Name the worker after its responsibility

Good names describe what the worker does — Support Process Router, Product Recommendation Worker, Claims Triage Worker, Compliance Research Assistant. Avoid vague names such as “AI Bot” or “Helper”.

2. Describe the worker in Agentic Worker Studio

Studio generates a first configuration from a plain-language description of the worker's goal.

Describe the worker's goal in plain language, then let Studio generate the first configuration.

Goal field

Describe what the worker should do, what it receives and what it should return.

Model selector

Select the model available for generating the initial worker configuration.

Example use cases

The interface provides starting ideas such as customer support, sales follow-up, help centre bot and customer onboarding.

Build my Agentic Worker

Generate the first worker configuration from the supplied description.

Create a worker called [name].

Its single responsibility is to [specific responsibility].

It receives:

- [input 1]
- [input 2]

It must return:

- [output 1]
- [output 2]

It may:

- [approved action]

It must not:

- [prohibited action]

When uncertain, it should:

- [clarification or escalation behaviour]

 Example goal

Create an internal customer-support process router. It receives a customer's open-text request, identifies the most likely support process and returns a structured classification. It must not resolve the issue itself or invent an outcome.

1 Describe one clear worker responsibility.

2 Include the expected inputs.

- 3 Include the expected output.
- 4 State important non-goals.
- 5 Explain what should happen when the request is ambiguous.
- 6 Select the generation model.
- 7 Select Build my Agentic Worker.
- 8 Review every generated setting in Composer.

⌚ Generation is a starting point

Do not publish a worker immediately after generation. Review its instructions, selected model, tools, guardrails, memory and limits first.

Understand the configuration tabs

Composer groups the worker's configuration into tabs, each answering one question.

TAB	MAIN QUESTION
Identity	Who is this worker and what type is it?
Behaviour	What should it do and how should it behave?
Model	Which configured model powers it?
Tools	What approved actions can it perform?
Guardrails	Which safety controls should apply?
Memory	What should it remember between messages?
Knowledge	Which approved knowledge bases may it answer from?
Limits	How much room does it have to plan, call tools and respond?

⌚ AI suggests; the designer decides

Composer may recommend settings and label them Suggested by AI. Review each suggestion against the business requirement. Suggested settings can be changed or removed.

3. Configure identity and worker type

Identity defines who the worker is and how it operates.

Identity defines the worker's name, description and operating type.

Display name

The human-readable name shown to designers and operators.

Description

A concise explanation of the worker's role.

Single-turn

Designed for focused interactions and everyday tasks. It can respond and use approved tools without running a long autonomous process.

Agent graph

Designed for multiple specialist agents working together, with one deciding which specialist handles the work.

Deep worker

Designed for longer, multi-step jobs that require planning and checking progress.

The available capabilities of each worker type may evolve. Use the descriptions shown in the current Designer interface as the source of truth.

Recommended for the ACME Support Process Router

Display name: ACME Support Process Router. Description: an internal worker that performs customer-service intent classification. Agent type: Single-turn — the router performs one focused classification and returns a result. It does not need a long research or multi-agent process.

Do not choose a more complex worker type without a clear need

The worker type should match the responsibility. A simple classification task should not be turned into a long, autonomous process.

4. Write precise behaviour instructions

Behaviour is where the worker's responsibility, boundaries and output contract are defined.

Behaviour instructions define the worker's responsibility, boundaries, inputs and expected output.

Tone

An optional description of how the worker should communicate, for example warm, concise or professional. For a machine-facing router, tone may be irrelevant because the worker returns structured data rather than customer-facing prose.

Instructions

The main business-specific instruction document. The platform may add standard behaviour and operational controls around these instructions.

Opening message

A message shown when the worker begins a customer-facing conversation. For an internal process router invoked by a flow, leave this blank.

- 1 Role — state what the worker is.
- 2 Single responsibility — state exactly what it must accomplish.
- 3 Inputs — list the fields it receives.
- 4 Outputs — define the required response structure.
- 5 Allowed actions — state what it may do.
- 6 Prohibited actions — state what it must not do.
- 7 Ambiguity handling — explain when to ask a clarification question or return an uncertain result.
- 8 Escalation — state when human support or another controlled process is required.

🕒 State non-goals explicitly

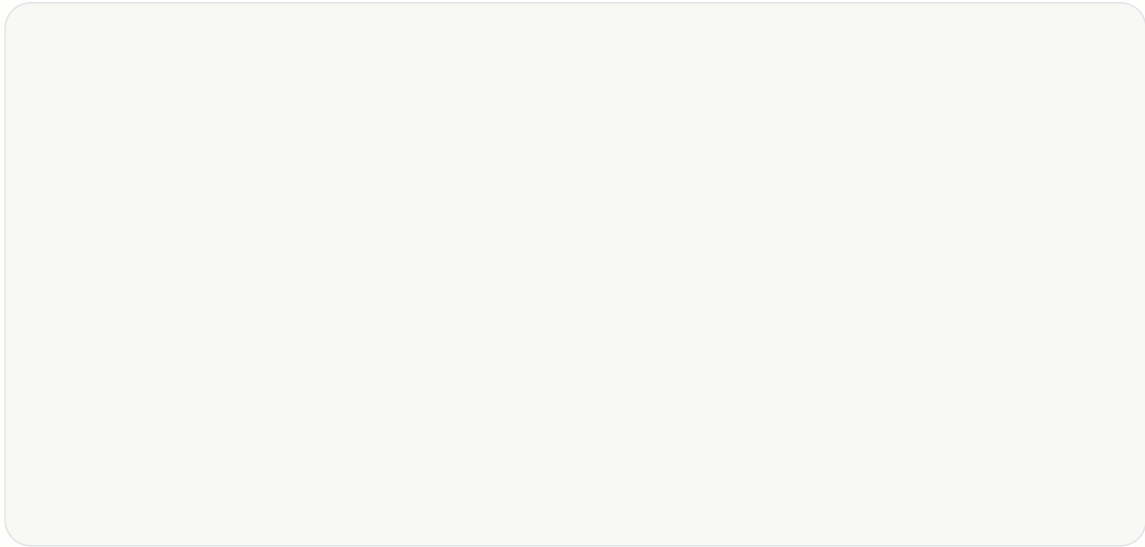
For the ACME router, clearly state that it must not display the customer-service main menu, resolve a delivery problem, promise a refund or compensation, invent an order status, contact a customer or call an unrelated process.

🕒 Keep machine-facing output stable

When a deterministic flow consumes the response, instruct the worker to return only the required fields and use consistent field names.

5. Select the model

Choose from the model credentials that have been made available to the workspace.



Choose a configured credential, provider and model, then tune response behaviour.

Credential

Select a model credential made available to the workspace.

Provider

The AI provider associated with the selected credential.

Model

The exact model identifier used by the worker.

Temperature

Controls how consistently or creatively the model responds. For structured classification, use a relatively precise setting and test whether the same request produces stable output.

Maximum reply length

Limit the size of the worker's response where a concise result is expected.

The provider, credential and model shown in the screenshot are examples. Do not treat them as required Greentic defaults.

Designers select configured models

Partnership administrators configure provider credentials and access. Designers select from the models made available to the workspace. See the [Admin AI and tools guide](#) for provider configuration. If the required credential is missing, do not enter credentials in the worker instructions — ask the workspace or partnership administrator to configure the provider correctly.

6. Add tools and reusable flows

Tools decide what the worker is actually able to attempt.

Tools allow the worker to use installed extensions or approved flows.

Extension tools

Installed extensions expose approved capabilities to the worker. The interface provides Add extension, search, a category filter, a description of each extension and an Add action.

Flow as tool

An existing flow can be made available as a callable tool where that architecture is appropriate.

- 1 Open the Tools tab.
- 2 Decide whether the worker genuinely requires a tool.
- 3 Select Add extension or Add flow as tool.
- 4 Search for the required capability.
- 5 Review its description.
- 6 Add only the required capability.
- 7 Update the Behaviour instructions to explain when it may be used.
- 8 Test successful, failed and ambiguous cases.

ⓘ Tool access must be intentional

A worker should not receive a tool merely because it is available. Every added tool expands what the worker can attempt.

ⓘ Prefer the smallest useful tool set

A process router that only returns a classification may not need to call external tools. A support assistant that retrieves an order status may require one specific lookup capability. Adding a tool makes it available to the worker; it does not by itself explain when or why the worker should use it. Define that in the Behaviour instructions. More detail is in the [Integrations and providers guide](#).

7. Apply guardrails

Guardrails add safety controls around what the worker receives and returns.

A selected guardrail will not run when its underlying capability is not installed.

- Guardrails can be suggested by AI.
- A suggested guardrail can be removed.
- Add guardrail opens the available guardrail choices.
- The interface shows whether the underlying protection is installed.
- A selected guardrail marked Not installed will not run.

📌 Selected does not mean operational

The screenshot shows a Prompt-injection guard selected for the worker, but also states “Not installed — this protection won’t run”. The required capability must be installed and configured at the tenant or platform level before the worker can rely on it.

The options visible in this release include PII masking, a profanity filter, a secret-leak guard and a topic or scope guard. The list shown in the interface is not permanent or exhaustive.

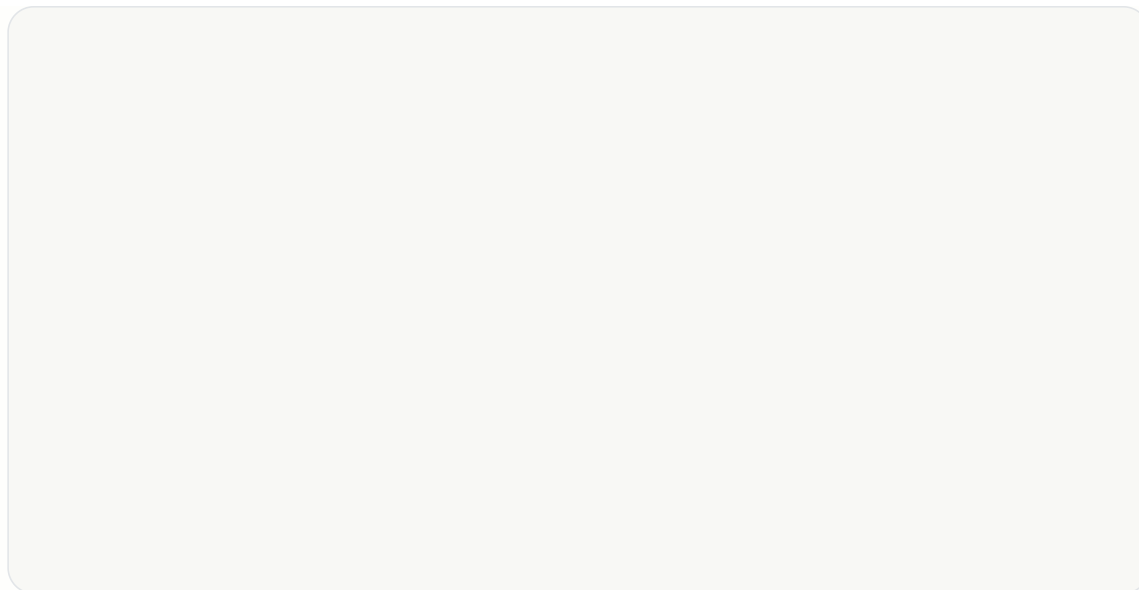
- 1 Review the worker’s exposure to untrusted input.
- 2 Open Guardrails.
- 3 Review any AI-suggested controls.
- 4 Add only the controls relevant to the use case.
- 5 Check the installation status.
- 6 Contact the partnership or platform administrator when a required capability is not installed.
- 7 Test the guardrail with safe fictional input.
- 8 Confirm that legitimate requests still pass.

📌 Guardrails complement good design

Guardrails do not replace precise instructions, limited tools, deterministic validation or human approval for sensitive actions. See the [Admin Guardrails guide](#) and the [Admin AI and tools guide](#).

8. Configure memory

Memory determines what context the worker carries between messages.



Memory can be configured separately for short-term and long-term use.

Short-term memory

Used when the worker needs context between messages within an active interaction.

Long-term memory

Used when the solution requires information to persist beyond the immediate interaction, according to the selected provider's configuration.

Provider controls

Each memory type includes an enable or disable toggle, provider selection, Configure and Remove.

Exact retention, storage and retrieval behaviour depends on the selected memory provider and its configuration.

🕒 A one-turn router may not need memory

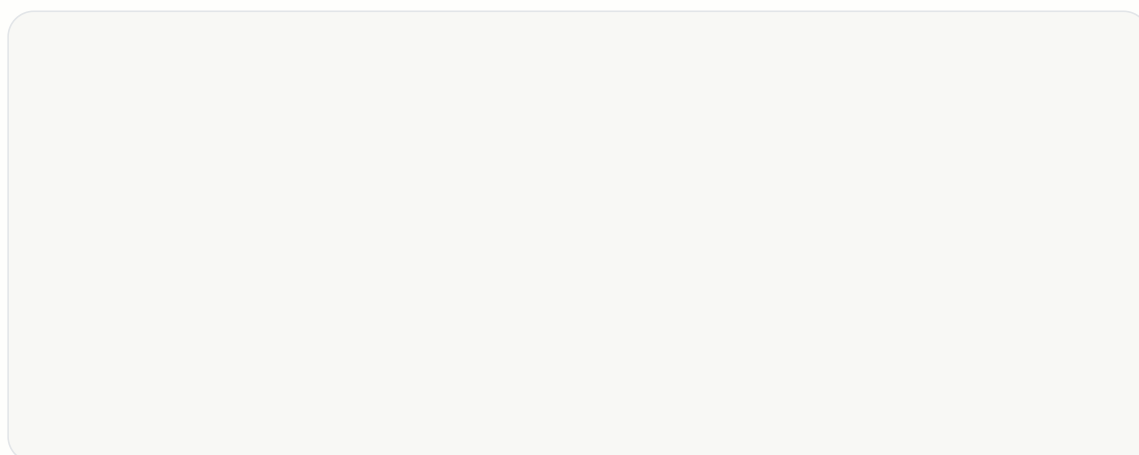
If each request contains everything required for classification, disable unnecessary memory. Add memory only when the worker needs earlier conversational context.

🕒 Do not use memory as a system of record

Important customer, transaction or compliance data should remain in the appropriate business system. Memory supports worker context; it does not replace controlled records.

9. Set execution limits

Limits control how much room the worker has to plan, call tools and respond.



Execution limits control how much room the worker has to plan, call tools and respond.

Light

Best suited to simple lookups, focused classification and short replies with limited back-and-forth.

Standard

The default choice for typical conversations that may require a small number of tool calls.

Heavy

Intended for longer multi-step research or investigation that requires more extensive work.

Use the current interface descriptions as guidance. Test the worker rather than assuming a higher limit will automatically improve it. Composer may recommend a limit and include a reason; designers can remove the suggestion and select another level. The selected limit should match the worker's actual responsibility.

Choose the smallest level that completes the task reliably

For the ACME Support Process Router, select Light. The worker performs single-pass intent classification and entity extraction. It does not need multi-step research or autonomous investigation.

Attach trusted knowledge when required

The Knowledge tab controls which prepared knowledge bases the worker can answer from.

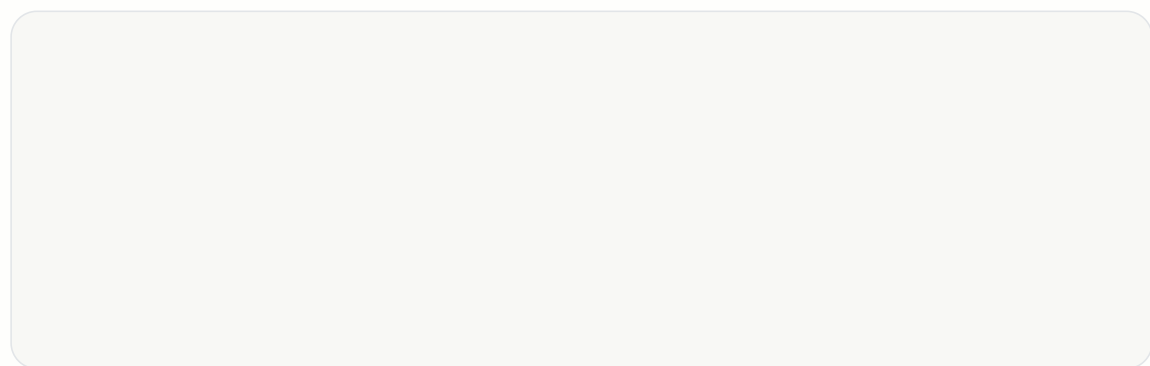
- Policies
- Product information
- Procedures
- Support content
- Internal documentation

Do not paste large policy documents into the instructions

Use a knowledge base for approved business context. Full detail is in the [Knowledge guide](#).

10. Test the worker

Test directly in Composer and check the response against the expected contract.



Test the worker directly and inspect whether its response matches the expected contract.

- The user enters an open customer request.
- The worker detects a likely late-delivery intent.
- The response includes structured fields.
- The result identifies the deterministic process intended to handle the request.
- The test panel includes Reset chat for starting a clean test.

The exact fields in the screenshot are specific to this demo and may include status, detected intent, confidence, extracted values, locale, a clarification question, possible intents, the called process and escalation indicators. Greentic does not automatically create or validate this exact schema for every worker.

- 1 Open the Composer test panel.

- 2 Reset the chat before testing an independent scenario.
- 3 Enter a representative request.
- 4 Confirm that the worker identifies the correct intent.
- 5 Confirm that required entities are extracted.
- 6 Confirm that uncertain requests produce the expected clarification behaviour.
- 7 Confirm that prohibited actions are not attempted.
- 8 Confirm that the output matches the downstream flow's expected structure.
- 9 Repeat the same request with alternative wording.
- 10 Test at least one clearly unrelated request.
- 11 Test a failure or missing-information case.
- 12 Correct the instructions or configuration and test again.

TEST TYPE	WHAT TO CONFIRM
Clear request	The correct intent or capability is selected
Alternative wording	Different customer phrasing produces the same intended route
Missing information	The worker asks for clarification or returns an incomplete status
Ambiguous request	The worker does not invent certainty
Unsupported request	The worker returns the approved fallback or escalation result
Adversarial request	Installed guardrails and instructions prevent unsafe behaviour
Repeated test	The response remains sufficiently stable for downstream processing

 Test the contract, not only the meaning

A response can be semantically correct but still break the downstream flow if a field is missing, renamed or returned in the wrong format.

11. Review before publishing

Work through this checklist before handing the worker to a release process.

 The worker has one clear responsibility.

 The display name and description are meaningful.

 The worker type matches the task.

 Behaviour instructions define inputs, outputs and non-goals.

 The opening message is appropriate for how the worker is invoked.

 The required model credential is selected.

 Temperature and response length match the use case.

 Only required tools or flows are attached.

 Required guardrails are installed, not merely selected.

 Memory is enabled only when needed.

 The execution limit matches the complexity of the task.

 Representative tests produce the expected result.

✔ Ambiguous and unsupported requests follow the approved fallback.

✔ Machine-facing output matches the downstream contract.

✔ No real customer data was used during testing.

Connect the worker to a controlled process

Build the deterministic flow that executes the business process the worker routes to.

[Open the Flows guide](#) →

Prepare the worker for release

Package, publish and deploy the worker through the approved release process.

[Open the Publishing guide](#) →

[Knowledge](#) [Integrations and providers](#) [Admin Guardrails](#) [Admin AI and tools](#)

Troubleshooting at a glance

PROBLEM	LIKELY CAUSE	ACTION
Build my Agentic Worker is unavailable	The goal is empty or no generation model is available	Enter a clear goal and confirm that a model is selectable
The worker returns generic customer-facing text	Its role and output contract are not specific enough	Strengthen the Behaviour instructions and define the exact output
The worker attempts to resolve the issue itself	Its non-goals or boundaries are missing	State that resolution belongs to the deterministic flow
The worker selects the wrong process	Intent descriptions overlap or too few test examples were considered	Refine the routing definitions and test alternative wording
The output cannot be used by a flow	Fields are missing, inconsistent or surrounded by extra prose	Define a stable structured-output contract and test it explicitly
A model is missing	The required credential is not available to the workspace	Ask the administrator to configure or expose the provider
A tool is not available	The extension or flow has not been installed, published or exposed	Review the workspace tools and administrative configuration
A selected guardrail will not run	The underlying capability is marked Not installed	Ask the administrator to install and configure the capability
The worker uses context it should not retain	Memory is enabled unnecessarily	Disable or reconfigure the relevant memory provider
The worker performs too much work	The instructions are too broad or the execution limit is excessive	Narrow the responsibility and select a lighter limit
Independent tests influence each other	The previous test conversation remains active	Use Reset chat before each independent scenario
The same request produces inconsistent routing	Instructions, model settings or output constraints are too loose	Clarify the decision rules, lower variability and repeat the test

[← Back to Designer Guides](#)



AI can design the process. The flow controls execution.

Designer can generate and update a flow from plain-language instructions. The resulting canvas remains an explicit process that designers can inspect, connect, configure, test and version.



Interpretation and control are different jobs

Agentic workers interpret open-ended requests. Flows control the sequence, branches, validations, approvals and approved outcomes.

What is a flow?

A flow is a visual graph of connected steps. Each step performs a defined function, and each connection controls what happens next.

☒ Structured user interfaces	☒ Conditional branches
☒ Agentic workers	☒ Other flows
☒ Human approval	☒ Model interactions
☒ HTTP requests	☒ MCP capabilities
☒ Installed extension steps	
Canvas The visual workspace containing the process steps and their connections.	Step One defined unit of work, such as displaying a card, evaluating a condition or calling a worker.
Connection The path from one step or outcome to the next.	Variables Values passed into, between and out of process steps.
Run Demo The interactive preview used to test the current draft.	Issue indicator A count showing that part of the project may require attention before deployment.
Validation The readiness check performed before continuing toward deployment.	

A flow uses only the capabilities its process actually requires. Many useful flows contain no AI step at all.

A continuous example

This guide uses one fictional ACME demonstration architecture: a customer-facing flow, an agentic worker that classifies requests and a deterministic resolution process.

✔ Customer-facing flow: ACME Customer Service Main Menu

✔ Agentic worker: ACME Support Process Router

✔ Controlled process: ACME Late Delivery Resolution

Customer opens the support menu
↓
Chooses an option or enters an open question
↓
Agentic Worker classifies the request
↓
Conditional Branch evaluates the result
↓
Go to Flow starts the approved process
↓
Deterministic resolution steps

📌 **The worker interprets; the flow decides what happens next**

The process router may return that a request appears to concern a late delivery. The flow decides which branch to follow and which deterministic resolution process to start. Not every flow needs an agentic worker.

On this page

Before you begin

A short amount of preparation removes most of the rework that follows an unclear process design.

✔ Confirm that the correct workspace is active.

✔ Define one clear business outcome for the flow.

✔ Identify the information the process receives.

✔ Identify the information it must return or display.

✔ List the important decisions and branches.

✔ Decide which actions must remain deterministic.

✔ Identify any human approvals that are required.

✔ Confirm which workers, tools or other flows are available.

✔ Prepare fictional test data for each important route.

📌 **Sketch the process before prompting**

Write down the start, main decisions, approved outcomes and end states. A clear process outline produces a flow that is easier to inspect and test.

1. Create a Flow project

A Flow project produces an explicit visual process you can inspect and control.

New Project
Name your project and choose how you want to build it.

PROJECT NAME
support ticket router

WHAT DO YOU WANT TO BUILD?

- Flow** (selected)
Visual graph of steps — triggers, AI, web requests, output cards.
- Agentic Worker**
Build an Agentic Worker — describe the goal, pick channels, and package it.
- SoRLa Studio** COMING SOON
Answer a short set of guided questions to author, build, and deploy a worker.
- Playbook**
Author a reusable procedure — instructions, tools, guardrails — your agentic workers can run.
- Import a flow or pack**
Load a .gtpack, .ygtc, or .json flow
- Import from GitHub**
Browse a connected repository

You can rename or duplicate it later. to create Cancel Create

Create a new project and select Flow for an explicit visual business process.

- 1 Open Designer Home.
- 2 Select New project.
- 3 Enter a clear project name.
- 4 Select Flow.
- 5 Review the project-type description.
- 6 Select Create.
- 7 Describe the process when the Flow Editor opens.

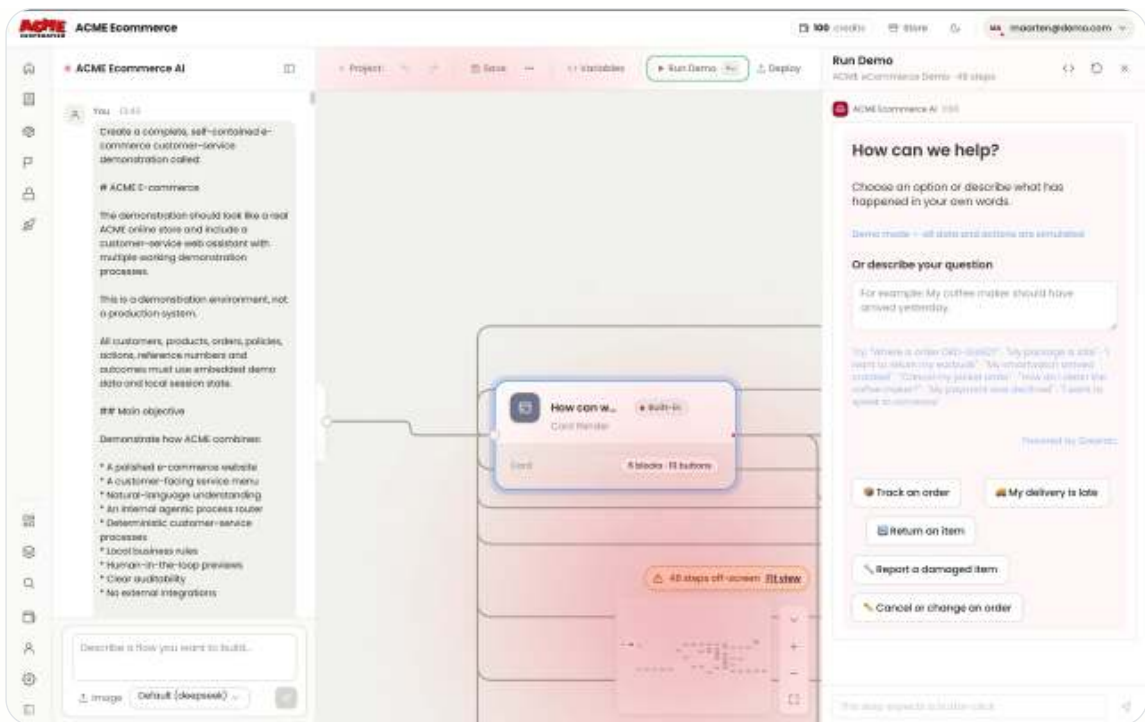
Use the business outcome as the project name

Good examples include Late Delivery Resolution, Commercial Insurance Quote, Employee Onboarding, Quality Claim Review and Customer Offer Creation. Avoid names such as "New Flow", "Test" or "Version 2".

The other project types in this dialog are covered in the **Getting started guide**.

2. Describe the process

Designer generates the first version of the process from your description, then you inspect and refine it.



Describe the required process on the left, inspect the generated canvas and test it in Run Demo.

AI design conversation

Describe what the process should achieve, what it should collect, which decisions it makes, which workers or flows it calls, what it must not do and which outcomes it presents.

Visual canvas

Inspect the complete process, select steps, add or remove steps, review connections, reorganise the layout and fit a large process into view.

Run Demo

The interactive experience produced by the current draft, shown beside the canvas.

Create a deterministic flow called [name].

Purpose:

[One clear business outcome]

Inputs:

- [Input 1]
- [Input 2]

Process:

1. [First step]
2. [Validation or decision]
3. [Approved action]
4. [Completion]

Branches:

- If [condition], go to [outcome]
- If [condition], go to [outcome]

The flow may:

- [Approved actions]

The flow must not:

- [Prohibited actions]

Demo requirements:

- Use fictional embedded data
- Do not call external systems
- Show realistic forms, choices and outcomes

Example requirement

Create a deterministic Late Delivery Resolution flow. Collect the order number, retrieve fictional delivery information, explain the current status and present only approved resolution options. Do not invent compensation or call external systems.

- 1 Describe the business outcome.
- 2 Name the required inputs.
- 3 List the main process steps.
- 4 Define the important branches.
- 5 State any approval or escalation requirements.
- 6 State what the flow must not do.
- 7 Ask Designer to generate the first version.
- 8 Inspect the complete canvas before making another request.
- 9 Make focused follow-up changes one at a time.

Make one purposeful change at a time

A focused instruction such as “add an order-number validation before the lookup” is easier to verify than asking Designer to restructure several unrelated areas at once.

Generated does not mean approved

Review every important step and connection before using the flow with real users or systems.

3. Understand the Editor controls

The Editor toolbar and canvas controls shown in the screenshot above cover saving, data, preview and deployment.

Save

Save the current draft.

Variables

Open the project's data and variable controls.

Run Demo

Preview the current experience.

Deploy

Begin the readiness and deployment journey.

Additional project actions

Open version, layout, import and export controls.

☒ Fit view

☒ Zoom in

☒ Zoom out

☒ Minimap

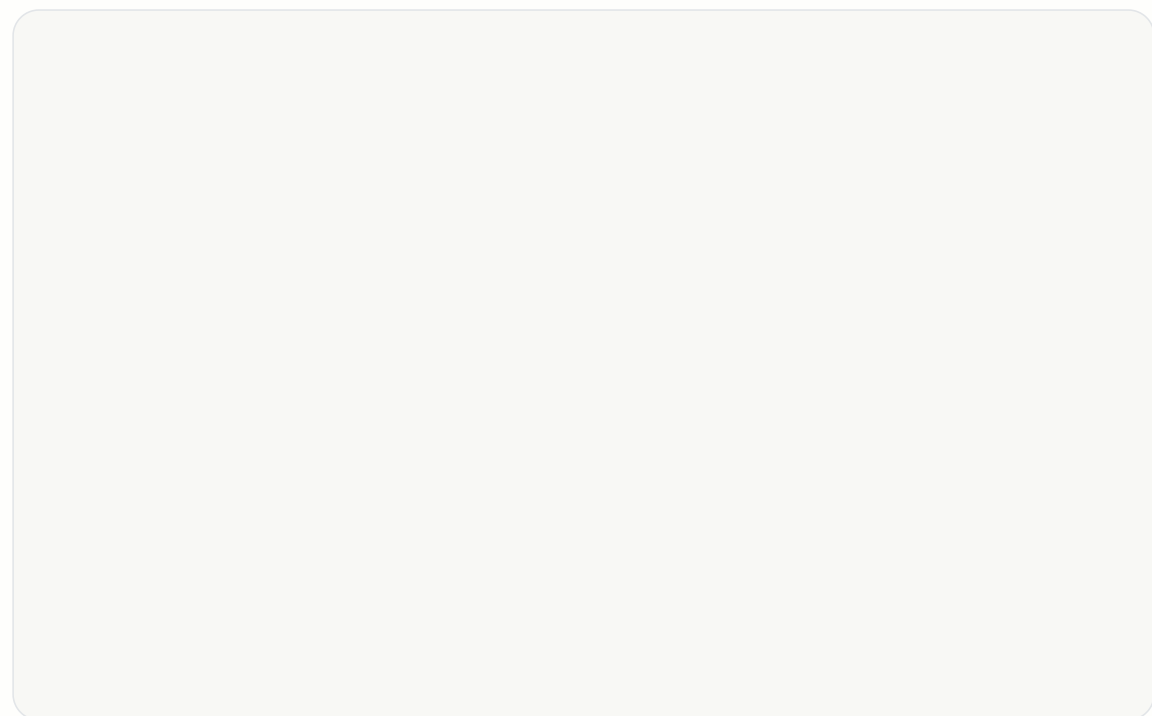
☒ Canvas movement

ⓘ Large processes extend beyond the viewport

A flow may contain many steps outside the visible area. Use Fit view and the minimap rather than assuming that only the visible steps exist.

4. Add process steps

Steps are the units of work in the process. Add them deliberately and connect them to explicit routes.



The Add Step dialog provides built-in steps and installed extension steps.

Steps

Built-in process capabilities provided by the Designer.

Extension steps

Additional steps exposed by installed extensions.

STEP	TYPICAL PURPOSE
Human Approval	Pause or route work for a human decision according to an approval policy
Card Render	Present structured information or collect input using a card
Conditional Branch	Select an explicit route according to a condition
Agentic Worker	Invoke a configured agentic worker
Go to Flow	Continue through another reusable flow
HTTP Call	Call an approved HTTP endpoint
LLM Chat	Use a model for a bounded language task inside the process
MCP	Invoke an approved MCP capability

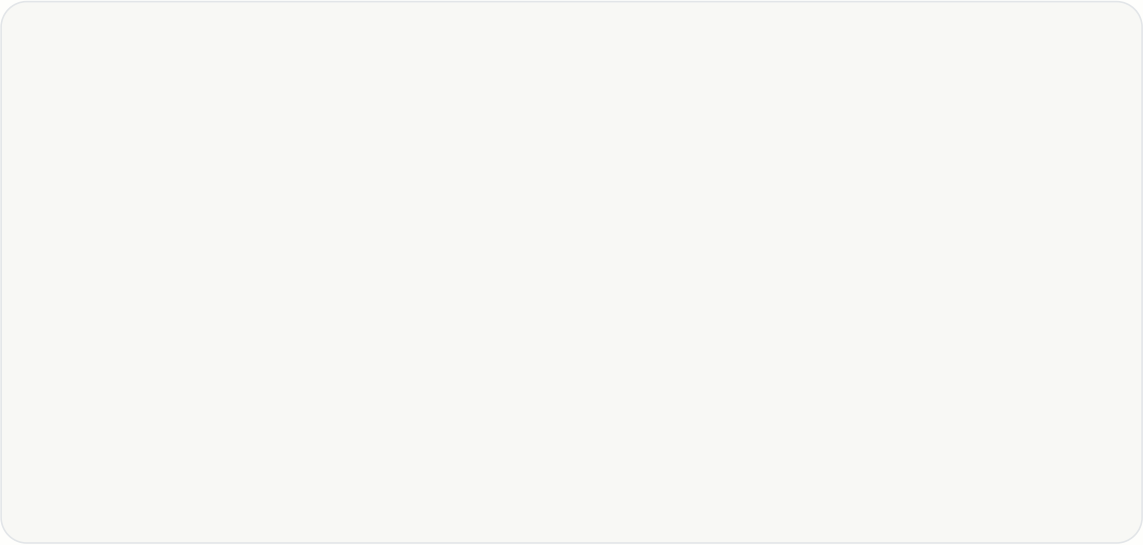
 **The step inventory varies**
The available steps depend on the current Designer version and the extensions installed in the workspace.
Treat the screenshot as an example of the current interface rather than a permanent exhaustive list.

- 1 Open the Add Step control.
- 2 Search for the required step.
- 3 Choose between built-in and extension steps.
- 4 Select the step type.
- 5 Give the new step a meaningful name.
- 6 Complete its required settings.
- 7 Connect it to the appropriate previous and next steps.
- 8 Run the affected path before continuing.

 **Name the action, not the technology**
Prefer Validate order number, Classify customer request, Check delivery status and Present approved options. Avoid Agentic Worker 1, Branch 3, HTTP Call and New Card.

5. Configure an Agentic Worker step

Selecting a step opens its settings panel, where the step name, required resources and interaction behaviour are configured.



Select a step to configure its name, required resource and interaction behaviour.

Step name

The name used to identify the step on the canvas and during design.

Agent

The Agentic Worker the step invokes. This field is required in the shown interface.

Conversational

Off returns one response and the flow continues.
On keeps the conversation with that worker open until it ends, then the flow proceeds.

ACME example configuration

Step name: Classify customer request. Agent: ACME Support Process Router. Conversational: Off. The process router performs a single classification and returns a structured result. It is not intended to hold an open customer conversation.

- 1 Add an Agentic Worker step.
- 2 Select the step on the canvas.
- 3 Enter a meaningful step name.
- 4 Select the required worker.
- 5 Decide whether the interaction should be single-response or conversational.
- 6 Connect the step to the incoming path.
- 7 Connect its output to the next decision or action.
- 8 Test the worker directly.
- 9 Test it again from inside the flow.

Do not make a router conversational by accident

A classification worker should normally return one controlled result. A conversational session can delay or confuse the deterministic process that follows it.

6. Combine workers and deterministic flows

Use the worker for interpretation and the flow for the decision, the data and the approved outcome.

```
Open customer message
    ↓
Agentic Worker step
    ↓
Structured classification
    ↓
Conditional Branch
    ↓
Go to Flow
    ↓
Controlled resolution
```

- 1 The customer-facing flow receives an open-text message.
- 2 The Agentic Worker step sends it to the process router.
- 3 The worker returns a stable classification result.
- 4 A Conditional Branch evaluates the result.
- 5 A Go to Flow step starts the relevant deterministic process.
- 6 The called flow collects information and performs the approved resolution steps.

detected_intent
confidence
clarification_question
called_process
suggest_human_support

These field names are an example from the ACME demonstration. They are not mandatory Greentic fields, and not every worker returns JSON. The designer defines the contract required by the receiving flow.

Branch on stable fields
Do not make the flow interpret a long paragraph returned by the worker. Ask the worker for a predictable result that a branch can evaluate reliably.

The worker must not own the business outcome
The worker may identify that a request concerns late delivery. The deterministic process should decide which data is required and which resolution options are permitted.

Worker configuration is covered in the **Agentic workers guide**.

7. Use specialised steps appropriately

Match each requirement to the step designed for it, and keep AI where interpretation is genuinely needed.

REQUIREMENT	RECOMMENDED STEP
Ask a person to approve a sensitive action	Human Approval
Display structured information or collect user input	Card Render
Route according to explicit data or state	Conditional Branch
Interpret an open-language request	Agentic Worker
Reuse another deterministic process	Go to Flow
Call a permitted web endpoint	HTTP Call
Perform a bounded language operation	LLM Chat
Invoke an approved MCP capability	MCP

Adaptive cards

Design the Card Render interfaces used to present information and collect input.

Open guide →

Integrations and providers

HTTP, MCP and installed capabilities available to process steps.

Open guide →

Publishing and deployment

Approvals, packaging and the deployment journey.

Open guide →

Agentic workers

Configure the workers a flow invokes.

Open guide →

Use AI only where interpretation is needed
Do not replace explicit business rules with an LLM step when a deterministic condition can express the decision clearly.

8. Plan variables, inputs and outputs

Predictable data names make branches, called flows and tests far easier to reason about.

- 1 Identify the data the flow receives.
- 2 Give each value a clear stable name.
- 3 Pass only the information required by each step.
- 4 Map step outputs deliberately.
- 5 Avoid storing credentials or secrets in ordinary flow variables.
- 6 Define what the flow returns when it completes.
- 7 Include fallback values or paths for missing information.

VARIABLE	PURPOSE
customer_message	Original open-text request
detected_intent	Classification returned by the process router
order_number	Order reference supplied by the customer
delivery_status	Fictional or retrieved delivery state
resolution_choice	Approved option selected by the customer

 Use the controls the Editor provides

Define and map data using the current Variables control and the individual step settings. These names are an example only.

 Use one name for one concept

Do not alternate between names such as order_id, order_ref and order_number unless they represent genuinely different values.

9. Run the flow in Demo

Run Demo tests the current draft through the same structured interaction the user will experience, without leaving the Editor.

- 1 Save the current draft.
- 2 Open Run Demo.
- 3 Start from the beginning of the interaction.
- 4 Select an available menu option or enter an open question.
- 5 Complete every required input.
- 6 Confirm that the expected branch starts.
- 7 Confirm that cards and messages contain the correct information.
- 8 Repeat the test using alternative wording.
- 9 Test missing and invalid information.
- 10 Reset the interaction before testing an independent scenario.
- 11 Correct the canvas and run the scenario again.

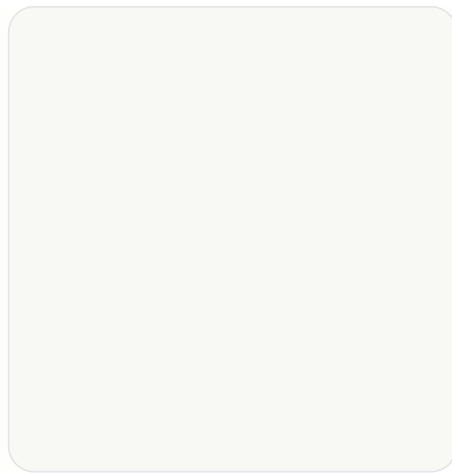
 Test every route, not only the first screen

A polished main menu does not prove that each branch, called flow or completion path works correctly.

A complete test approach is described in the [Testing and troubleshooting guide](#).

10. Save, version, import and export

Record meaningful project states so significant design changes remain reversible and reviewable.



The project menu provides versioning, layout, import and export actions.

Version history

Review versions recorded for the project.

Save as version

Create a named or recorded project version before significant changes or release.

Auto-layout

Rearrange the canvas automatically.

Import flow

Import supported flow content.

Export flow

Export the flow using the supported Designer format.

Export to GitHub

Export supported project content to a connected GitHub destination.

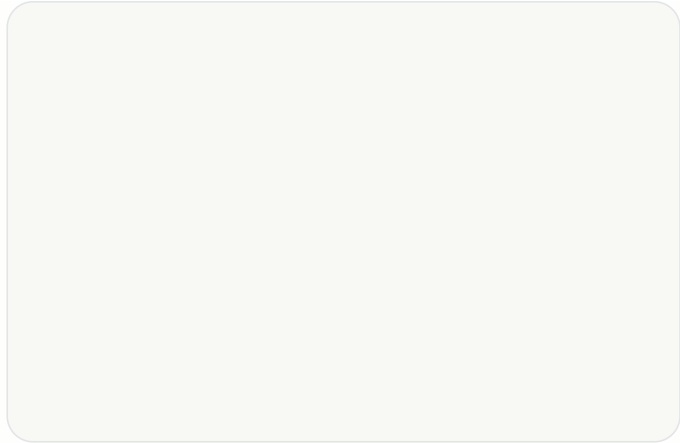
- 1 Save the draft.
- 2 Complete a representative Run Demo test.
- 3 Open the project actions menu.
- 4 Select Save as version.
- 5 Record a meaningful version description where requested.
- 6 Continue editing in the draft.
- 7 Use Version history when reviewing previously saved states.

🕒 Version before restructuring

Save a version before replacing an important branch, changing a worker contract or reorganising a large process.

II. Validate before deployment

Designer performs a readiness check as the project moves toward deployment.



A successful readiness check confirms that Designer found no blocking configuration issues.

✓ A successful result states that no issues were detected.

✓ The summary may include the number of cards and process steps.

✓ Let's go continues the publishing or deployment journey.

✓ The counts shown belong only to the ACME demonstration.

ⓘ **Validation is not business acceptance**

A clean technical check does not prove that every business rule is correct, that every user route has been tested, that every external system will respond, that every approval policy is suitable or that the customer has accepted the experience.

- 1 Save the current draft.
- 2 Run representative tests.
- 3 Resolve the visible issue count.
- 4 Continue to the deployment readiness check.
- 5 Review the validation result.
- 6 Return to the Editor when an issue remains.
- 7 Continue only when the project is technically ready and the business test has passed.

The next stage is covered in the **Publishing and deployment guide**.

Flow review checklist

Work through this list before the flow is shared, tested with customers or moved toward deployment.

☑ The flow has one clear business outcome.

☑ The start and completion states are clear.

☑ Inputs and outputs have stable names.

☑ Important decisions use explicit branches.

☑ Agentic workers are used only where interpretation is required.

☑ Worker outputs follow a stable contract.

☑ Every called flow exists and is available.

☑ Sensitive actions use human approval where required.

☑ Only approved external capabilities are used.

☑ Every important branch has been tested.

✔ Missing and invalid inputs follow a controlled path.

✔ Customer-facing text and cards are understandable.

✔ The draft has been saved.

✔ A meaningful version has been recorded.

✔ The project passes the readiness check.

Build structured user interfaces

Design the cards that present information and collect input.

[Open Adaptive cards](#) →

Test every route

Test workers directly, test the flow and confirm readiness.

[Open Testing and troubleshooting](#) →

Flow troubleshooting

Common design-time problems and the practical action that resolves them.

PROBLEM	LIKELY CAUSE	ACTION
Most of the process is off-screen	The generated flow is larger than the current viewport	Use Fit view, zoom controls and the minimap
A new step cannot be configured	A required resource or field is missing	Select the step and complete every required setting
An Agentic Worker step cannot run	No available worker is selected	Configure or publish the worker and select it in the step
The wrong process starts	The worker output or branch condition is ambiguous	Tighten the output contract and review the branch logic
A branch is never reached	Its condition does not match the actual variable value	Inspect the expected output and test the boundary case
A called flow does not start	The destination flow is unavailable or the route is incomplete	Confirm the target and inspect the connection
The demo stops waiting for input	A card or step expects a user action	Complete the displayed input or button action
A change is lost during later editing	It was not saved or recorded as a version	Save regularly and use Save as version
The project shows an issue count	One or more required settings or connections need attention	Inspect the affected steps and complete the missing configuration
Validation succeeds but the process is wrong	Technical validation does not check every business rule	Complete business testing and customer acceptance

[← Back to Designer Guides](#)

Use cards for structure, not decoration

Use an Adaptive Card when the user needs to:

- Understand structured information
- Select from approved choices
- Enter required data
- Confirm an action
- Navigate to the next controlled process step
- Use an ordinary message when no structured interaction is required.



The card is the interface, not the business logic

A card controls the interface presented to the user. The surrounding Flow should still validate captured values, apply business rules and control the final outcome.

What is an Adaptive Card?

An Adaptive Card is a structured user interface rendered inside a supported Greentic experience. A card can contain content, inputs and actions while adapting its presentation to the supported host.

☒ Menus	☒ Forms
☒ Clarification questions	☒ Order or case summaries
☒ Choice lists	☒ Confirmations
☒ Final results	
Card Render The Flow step that displays an Adaptive Card.	Card intent A natural-language description of the card Designer should generate.
Content block A visual element such as text, a heading, an image or an input.	Input A field through which the user supplies a value.
Action	Answer name The stable identifier used for a captured input value.

A button that submits data, opens a URL or routes to another Flow step.

Live preview

A rendered preview of the current card configuration.

Terminal card

A final card that ends the Flow after it is rendered.

Validation mode

How card-schema issues are treated at render time.

Card types

Most cards fall into one of a small number of recognisable patterns.

CARD TYPE	TYPICAL PURPOSE	EXAMPLE
Display card	Present structured information	Delivery-status summary
Menu card	Offer approved process choices	Track, return or report damage
Input card	Collect one or more values	Order number or clarification
Confirmation card	Ask the user to confirm an action	Confirm cancellation
Terminal card	Present a final result and end the Flow	Resolution completed

One card may combine more than one purpose. For example, an order-summary card may display information and include buttons for the next approved actions.

Continuous examples

This guide follows two related fictional ACME cards.

Clarification card

Ask for missing information when an Agentic Worker cannot confidently select the correct customer-service process. The captured answer in this demonstration is named `clarification_response`.

Track Your Order card

Display a prefilled fictional order number and let the customer either continue tracking or return to the main menu.

These are demonstration examples rather than required Greentic patterns. Card IDs, answer names and order numbers shown here are fictional.

On this page

Before you begin

A card is quicker to build when the surrounding process is already clear.

✔ Confirm that the correct workspace and Flow project are active.

✔ Define the card's single primary purpose.

✔ Identify the information the user should see.

✔ Identify the values the user must provide.

✔ Define stable names for every captured answer.

✔ Decide where each button should route.

✔ Decide whether the card is terminal.

✔ Prepare fictional test data.

✔ Define the Flow validation that should occur after submission.

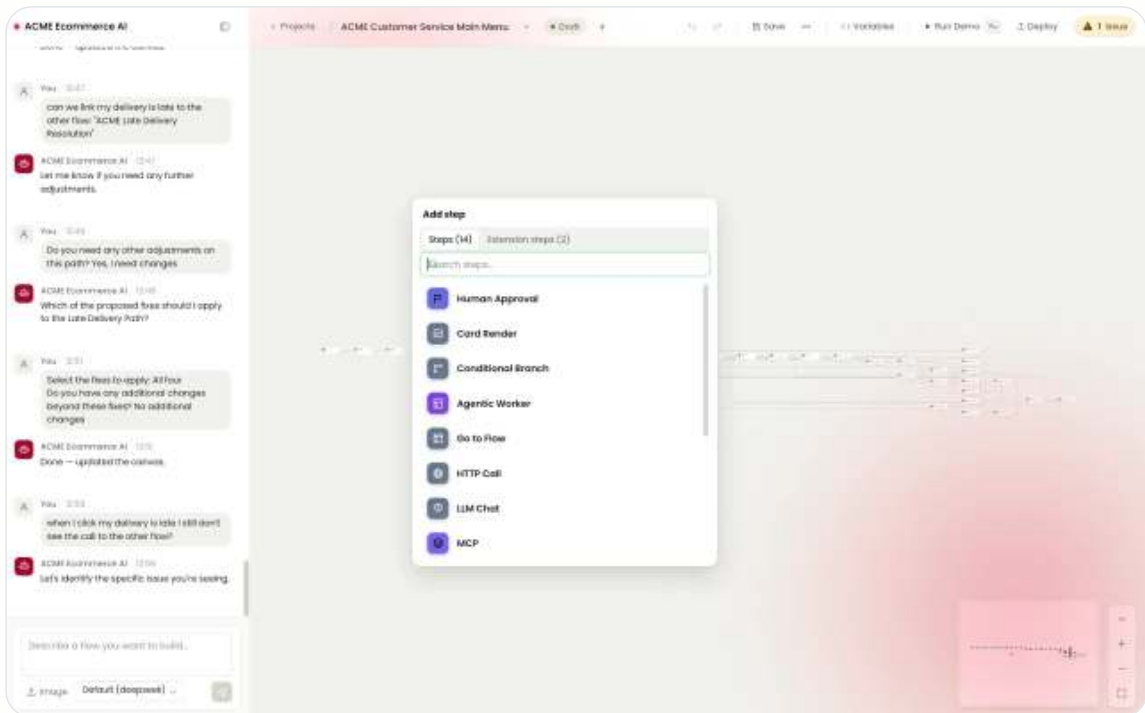
✔ Keep card text short enough to read comfortably.

🕒 Design the next action first

Before building the card, decide what each button should do and which values the following Flow step requires.

1. Add a Card Render step

Card Render is a built-in Flow step. Its incoming connection determines when the card is displayed, and its action routes determine what happens after the user responds.



Add Card Render when a Flow needs a structured user interface.

Open the Add Step dialog in the Flow Editor and select Card Render from the built-in steps. The step becomes part of the explicit Flow canvas.

- 1 Open the intended Flow project.
- 2 Select the point where the user interface is required.
- 3 Open Add Step.
- 4 Select Card Render.
- 5 Give the step a meaningful business name.
- 6 Connect the incoming Flow path.
- 7 Configure or generate the card.
- 8 Connect its button actions to the correct next steps.
- 9 Run the affected route in Demo.

🕒 Name the user interaction

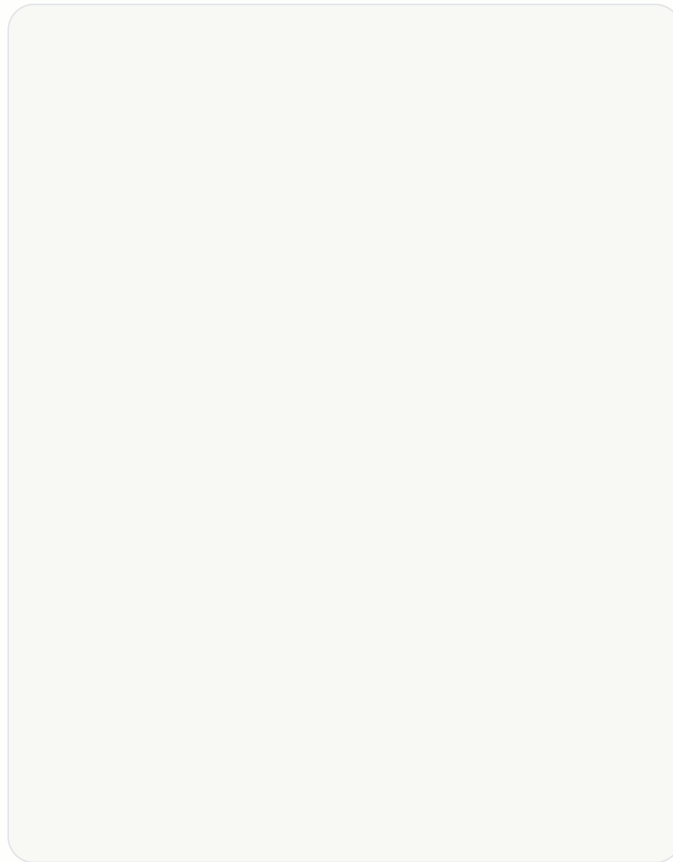
Prefer: Ask for order number · Clarify customer request · Present delivery options · Confirm cancellation · Show resolution summary.

Avoid: Card Render 1 · New Card · Input · Form 2.

For step connections, branches and canvas controls, see the **Flows guide**.

2. Describe the card intent

Card Render can generate a complete card from a natural-language instruction.



Card Render can generate a card from a natural-language instruction with optional data and host context.

Step name

The name used for the Card Render step on the Flow canvas.

Instruction

A natural-language description of the card to generate: its purpose, the information to display, the inputs required, the labels to use, the buttons required and the intended user outcome.

Data

Optional name-and-value pairs that provide design-time context to the card generator.

Host

Optional host context for card generation where supported.

Data is a design-time hint

The interface states that values placed in Data are copied into the generated card. Data should not be described as automatic runtime substitution.

Example instructions

Ask the customer for the missing information needed to route their support request. Include a clear heading, a short explanation, one multiline response field and a Submit button.

Show a Track Your Order card with the current order number, a Track this order button and a Return to menu button.

- 1 Select the Card Render step.
- 2 Enter a meaningful step name.
- 3 Describe the card in the Instruction field.

- 4 Add design-time Data entries only when they help generation.
- 5 Add Host context only when it is required and supported.
- 6 Generate or refresh the card.
- 7 Open Preview.
- 8 Refine the generated card in the visual editor.

🕒 Describe the information architecture

A useful card prompt explains the required hierarchy: heading, short explanation, input or information, primary action, secondary action.

🕒 Do not paste secrets into card data

Do not place credentials, API keys, access tokens or private customer information in Instruction, Data or Host.

3. Use runtime variables correctly

Design-time data and runtime values behave differently. The Card Render interface is explicit about this distinction.

✅ Data supplied to the card generator is a design-time hint.

✅ A direct node reference copied into generated card content may render empty.

✅ A `{{vars.<name>}}` reference can resolve when the card is rendered.

✅ The relevant Flow variable must already have been captured or set.

Previous Flow step
↓
Value captured into a Flow variable
↓
Card contains `{{vars.variable_name}}`
↓
Card Render resolves the variable

`{{vars.order_number}}`

The specific variable must exist before the Card Render step runs.

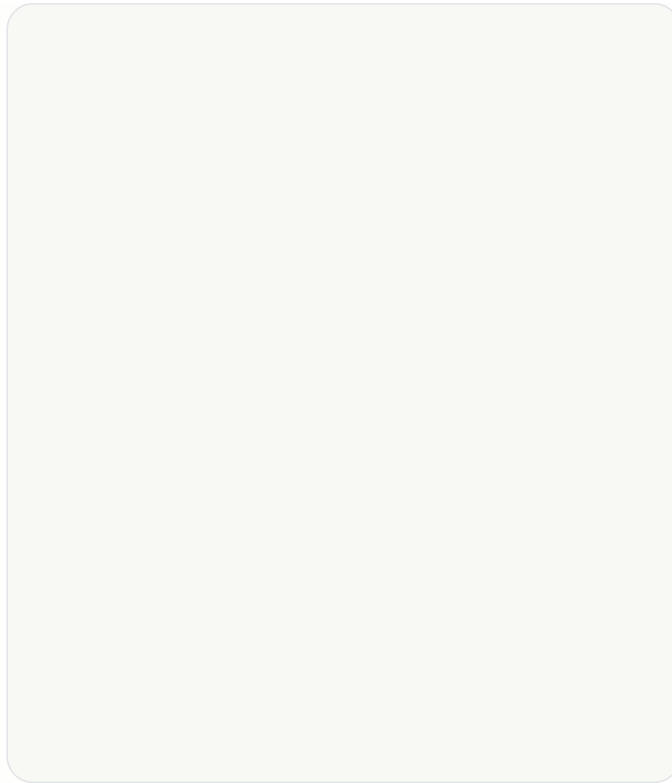
🕒 Do not reference arbitrary node output directly in card text

Prepare the value as a Flow variable first, then use the supported variable reference inside the card.

For Flow variables and process data, see the **Flows guide**.

4. Preview, validate and choose terminal behaviour

Preview the card, choose how schema issues are treated and decide whether the card ends the Flow.



Preview the card, choose schema-validation behaviour and decide whether it ends the Flow.

Preview

Shows the current card before running the complete Flow.

Edit card

Opens the full Adaptive Card Designer.

Card count

The interface summarises the number of content blocks and buttons. Treat the displayed count as an example only.

Validation: Off

Do not apply the card-schema validation behaviour at render time.

Validation: Warn

Report card-schema issues as warnings.

Validation: Error

Treat card-schema issues as errors.

Terminal

When enabled, the Flow ends after the card is rendered: there is no further routing and button navigation does not continue.

Use Terminal for a final result or confirmation card. Leave Terminal disabled when the user must select an action or supply information before the Flow continues.

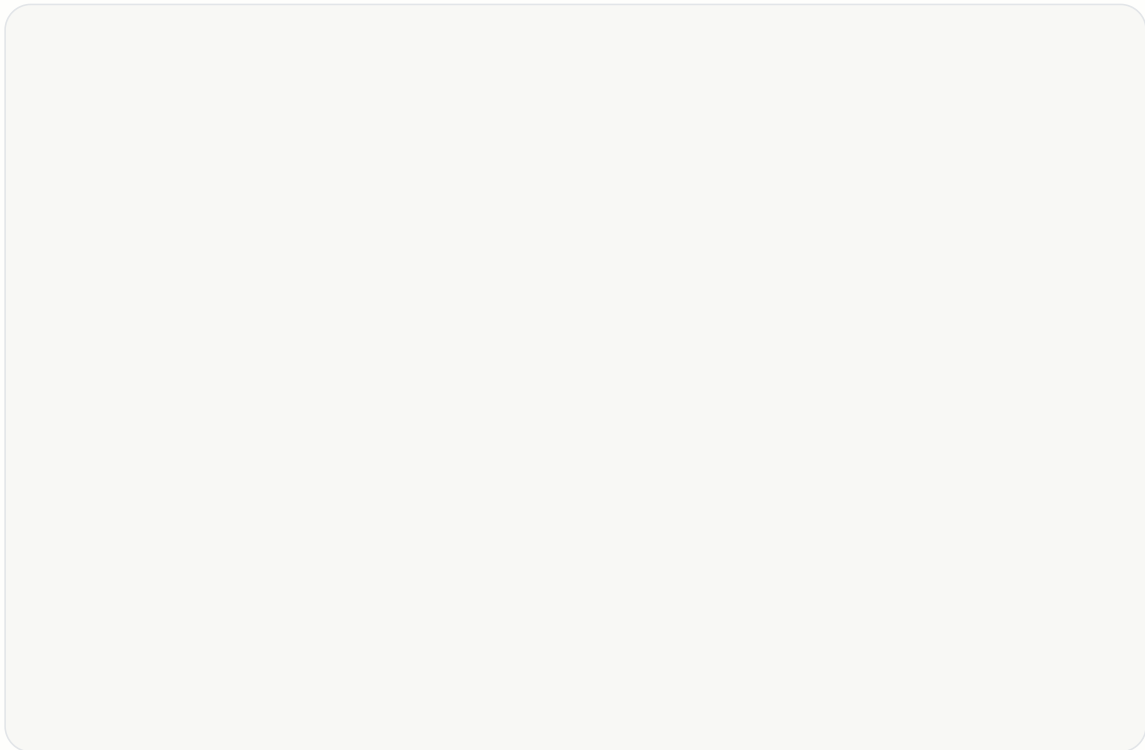
 A terminal card cannot continue the process

Do not enable Terminal on a clarification, menu or input card that must route to another step.

- 1 Open the Preview tab.
- 2 Review content hierarchy and labels.
- 3 Confirm that every input has a clear purpose.
- 4 Confirm that all required actions are visible.
- 5 Select an appropriate validation mode.
- 6 Enable Terminal only for a final card.
- 7 Select Edit card when visual or structural changes are required.

5. Build the card visually

Build mode combines an element palette, the ordered card structure and a live preview.



Build mode combines an element palette, ordered card structure and live preview.

Element palette

The current interface shows Text, Heading, Image, Chart, Facts, Rich text, Media, Container, Columns, Text input and Choice input, plus Submit button and Open URL button actions. Treat this as the current interface, not a permanent exhaustive list.

Card structure

The centre area contains content blocks and actions, with reordering, expand and collapse, duplicate, delete and add controls.

Live preview

The right side shows the card as it is currently rendered.

- 1 Open the Card Designer.
- 2 Stay in Build mode.
- 3 Add the required content elements.
- 4 Arrange them in a logical reading order.
- 5 Add the required inputs.
- 6 Add one clear primary action.
- 7 Add secondary actions only when they are useful.
- 8 Review the Live preview after each significant change.
- 9 Confirm that the card remains marked Valid.
- 10 Select Save card.

Keep the card focused

A card should help the user complete one clear task. Split an overly long interaction into multiple Flow steps rather than creating one crowded card.

Clear heading
Short explanation
Essential information or input
Primary button
Optional secondary button

6. Configure text inputs

Each input needs a stable identifier, a clear label and an intentional required state.

Each input needs a stable answer name, a clear label and an intentional required state.

Answer name

The stable identifier used to capture the submitted answer, for example `clarification_response`.

Label

The user-facing description of the information required. It should remain understandable when read without the surrounding paragraph.

Default value

An optional prefilled value. Use defaults only when the value is known, safe to show, reviewable and not misleading.

Required

Controls whether the interface expects the field to be completed before submission.

GOOD ANSWER NAMES

`order_number` · `clarification_response` ·
`resolution_choice` · `customer_email`

AVOID

`input1` · `answer` · `field` · `value2`

Use lowercase stable names, use underscores where helpful, describe the business value and do not reuse the same answer name for unrelated inputs.

ⓘ Required is not full business validation

The Required setting can ensure that a value is present. The following deterministic Flow should still validate format, length, allowed values, ownership and business eligibility.

- 1 Add a Text input.
- 2 Expand the input properties.

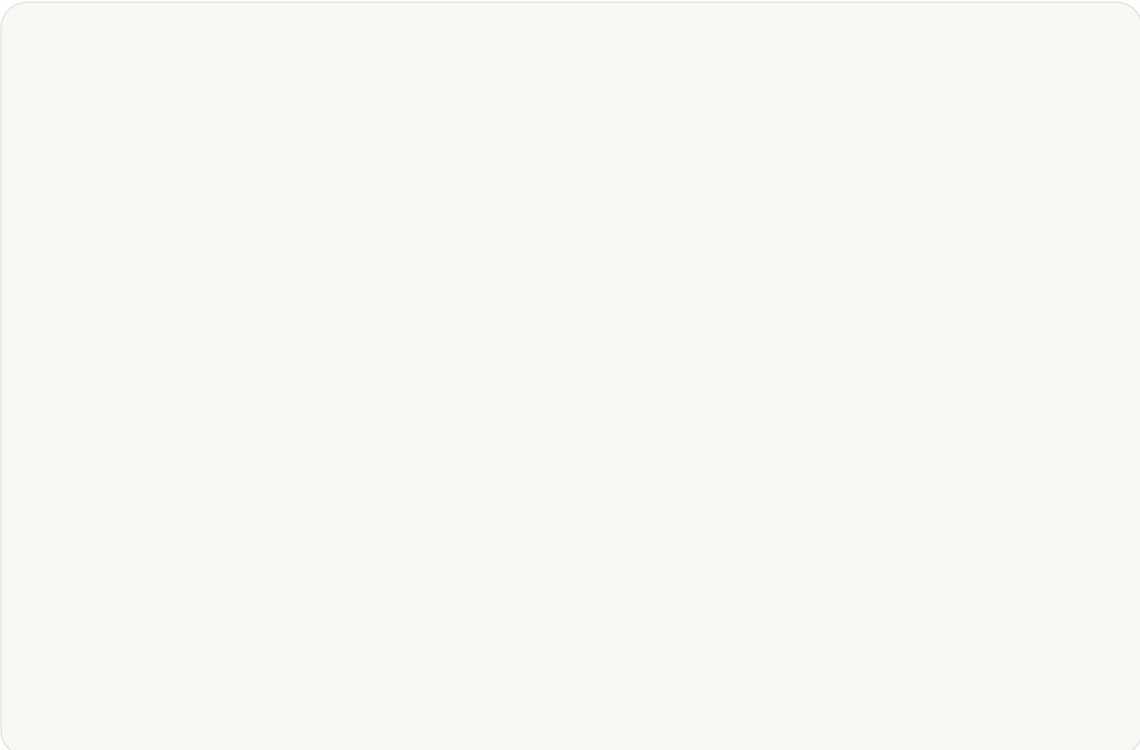
- 3 Enter a stable Answer name.
- 4 Add a concise Label.
- 5 Add a Default value only where justified.
- 6 Enable Required when the process cannot continue without the value.
- 7 Review the Live preview.
- 8 Save the card.
- 9 Validate the captured answer in the next Flow step.

 Use visible labels

Do not rely only on placeholder text to explain what the user must enter.

7. Configure Submit actions and routes

Submit actions have a user-facing title and follow the route connected in the Flow.



Submit actions have a user-facing title and follow the route connected in the Flow.

Button title

The text displayed on the button. Use action-oriented labels such as Submit, Continue, Track this order, Confirm cancellation or Return to menu.

Routes to

The Flow destination associated with the button. The interface explains that this is set automatically based on where the button goes.

Avoid unclear labels such as OK, Yes or Next unless the surrounding context makes the meaning unambiguous. The supplied example shows End of flow (no target), which is appropriate only when the action should complete the Flow. A card intended to continue must have its action connected to the relevant next step. Routes to is not an ordinary free-text field.

Submit button

↓

Connected card action

↓

Next Flow step

- 1 Add or select a Submit button.
- 2 Enter a clear Button title.
- 3 Return to the Flow canvas where necessary.

- 4 Connect the button outcome to the intended next step.
- 5 Reopen the card and confirm the displayed route.
- 6 Test the action in Run Demo.
- 7 Confirm that captured input is available to the receiving step.
- 8 Confirm that no action produces an unintended dead end.

ⓘ **End of flow is not a default continuation**

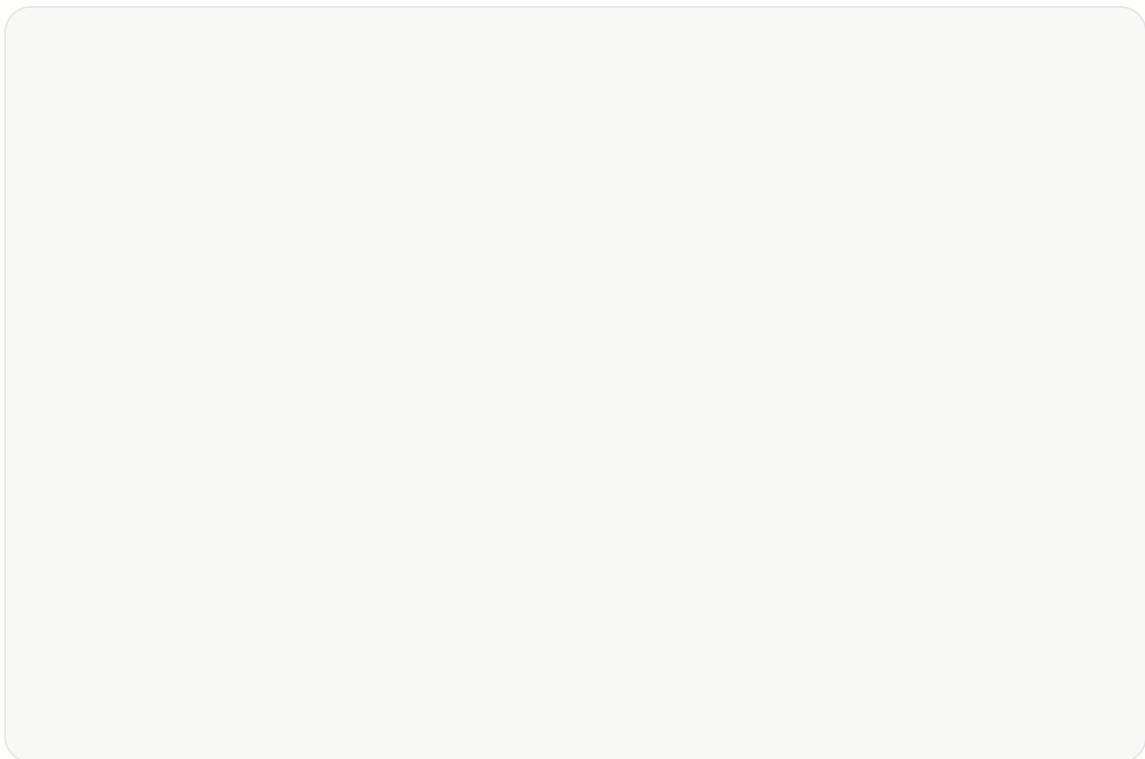
When Routes to shows End of flow (no target), the button does not lead to another process step.

ⓘ **Do not trust submitted input without validation**

Treat card input as user-supplied data and validate it before using it in business actions or external calls.

8. Edit the card in Code mode

Code mode exposes the underlying Adaptive Card JSON alongside the same live preview.



Code mode exposes the card JSON alongside the same live preview.

✓ Build is the visual editing mode.

✓ Code exposes the underlying Adaptive Card JSON.

✓ Format reformats the current JSON.

✓ Copy copies the JSON.

✓ Live preview remains available.

✓ Valid indicates whether the card passes the editor's schema check.

ⓘ **Valid does not mean complete**

A card can be schema-valid while still having confusing labels, broken business routing, missing validation, poor accessibility, incorrect runtime variables or misleading default values.

- 1 Save the visual structure before making advanced changes.
- 2 Select Code.

- 3 Review the generated JSON.
- 4 Make only the intended change.
- 5 Use Format to improve readability.
- 6 Review the Live preview.
- 7 Confirm that the card remains Valid.
- 8 Return to Build mode and confirm that the card is still editable.
- 9 Save the card.
- 10 Run the complete Flow again.

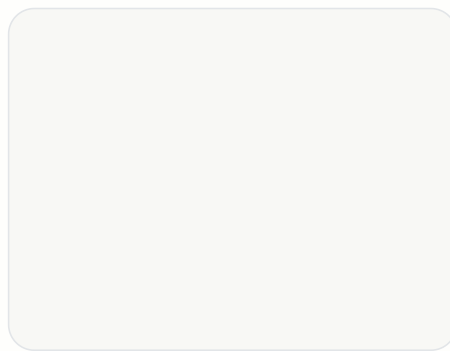
The schema version visible in one example card is not necessarily the only version supported by Greentic.

ⓘ Prefer Build mode for routine changes

Use Code mode when a required property cannot be expressed conveniently through the visual controls, or when reviewing the generated structure.

9. Use AI assistance

AI assistance can refine, analyse and review an existing card.



AI assistance can refine, analyse and review an existing card.

Clean up

Improve or simplify the current card structure or content.

Rewrite

Rewrite selected card wording.

Analyze

Review the card and identify potential improvements.

Accessibility check

Review the card for potential accessibility concerns.

ⓘ Assistance does not transfer responsibility

AI assistance can suggest improvements. The designer remains responsible for checking wording, routing, captured values, accessibility and business accuracy.

- 1 Build the first card.
- 2 Review it manually.
- 3 Open AI assist.
- 4 Choose the relevant action.
- 5 Review the proposed change.
- 6 Confirm that important labels and answer names remain correct.
- 7 Confirm that routing has not changed unexpectedly.
- 8 Review the Live preview.
- 9 Save the card.

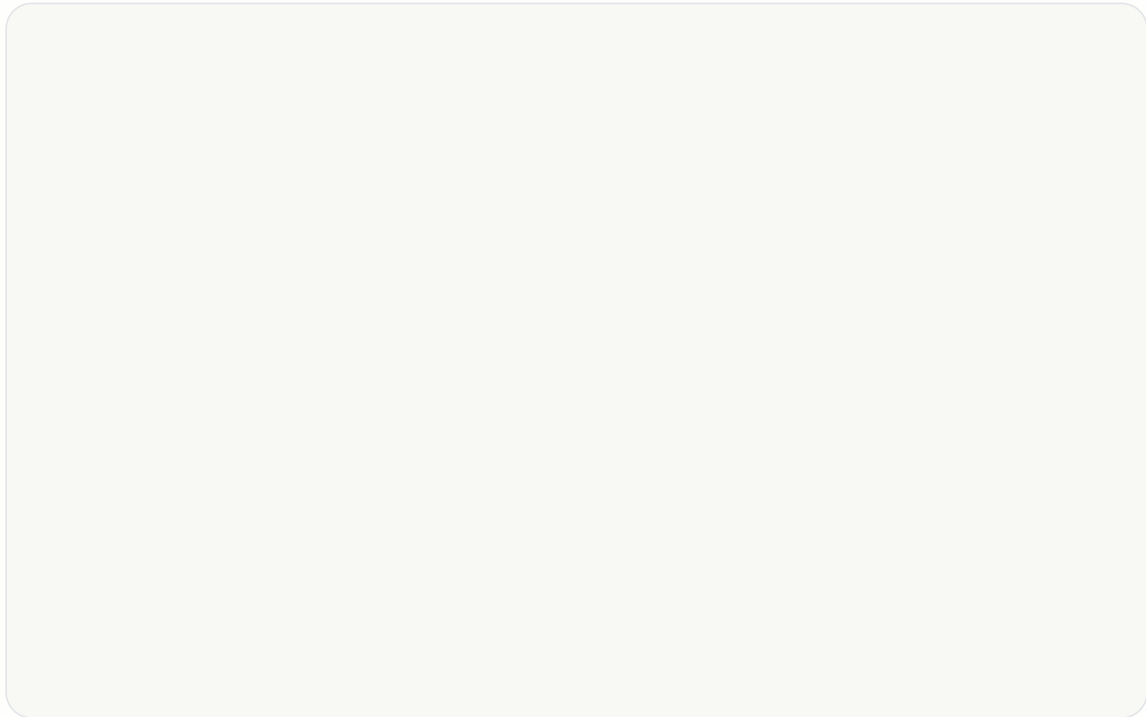
10 Run the card in the complete Flow.

 Generate with AI

The Generate with AI action can create a first card from a description. Review the generated card in Build and Preview, and do not assume generated inputs, labels or routes are correct.

10. Test the complete card interaction

Run Demo confirms that the card appears at the right moment and that every button keeps the user inside the controlled process.



Run Demo confirms that card buttons open the intended next card and keep the user inside the controlled Flow.

☒ The customer sees a structured service menu.

☒ The user selects the Track order action.

☒ The Flow follows the connected route.

☒ A Track Your Order card is displayed.

☒ The order-number input contains a fictional prefilled value.

☒ The card provides Track this order and Return to menu actions.

☒ Run Demo waits for the expected button action.

- 1 Save the card.
- 2 Return to the Flow Editor.
- 3 Open Run Demo.
- 4 Navigate to the card through the same route a user will follow.
- 5 Confirm that the correct card appears.
- 6 Confirm all runtime variables resolve.
- 7 Confirm prefilled values are correct.
- 8 Enter or change a value.
- 9 Select the primary button.
- 10 Confirm that the intended next step opens.
- 11 Restart the interaction.

- 12 Test every secondary action.
- 13 Test an empty required field.
- 14 Test invalid input.
- 15 Test the card at the end of the full business journey.

 Test from the previous step

Opening the card preview directly does not prove that the Flow passes the correct data into it. Test the route that leads to the card.

 Preview success does not guarantee runtime success

The preview may look correct while a runtime variable is missing, the wrong Flow route is connected, submitted input is not captured, the next step expects a different answer name or a button ends the Flow unexpectedly.

For execution inspection and diagnosis, see **Testing and troubleshooting**.

11. Accessibility and content quality

A card is only useful when every customer can read it, understand it and act on it.

Text

- Use short headings.
- Use plain language.
- Keep instructions concise.
- Avoid unexplained abbreviations.
- Make error and confirmation messages specific.

Inputs

- Give every input a visible label.
- Explain the expected format where necessary.
- Use Required intentionally.
- Do not rely only on placeholder text.
- Avoid unnecessary fields.

Actions

- Use action-oriented button labels.
- Make the primary action obvious.
- Avoid several visually equal actions.
- Provide a safe way back where appropriate.

Layout

- Use a logical reading order.
- Group related information.
- Avoid excessive columns.
- Check the card at narrow widths.
- Do not rely only on colour to communicate meaning.

-  Run the Accessibility check.

-  Review its suggestions.

-  Complete a manual check.

-  Test with realistic text lengths.

 Accessibility check is assistance, not certification

The AI check does not replace manual review, host-specific testing or the customer's accessibility requirements.

12. Recommended card design process

A repeatable sequence that keeps cards usable and the surrounding process correct.

```
Define purpose
↓
Define captured values
↓
Define button routes
↓
Write card intent
↓
Generate first card
↓
Refine in Build mode
↓
Review Preview
↓
Check validation and accessibility
↓
Test in Run Demo
↓
Validate submitted values in the Flow
```

- 1 Define the card's single primary purpose.
- 2 Define every answer name.
- 3 Define the next Flow route for every action.
- 4 Write the natural-language card intent.
- 5 Generate the first card.
- 6 Review the content and actions.
- 7 Refine inputs and labels in Build mode.
- 8 Use Code only where required.
- 9 Run AI analysis and accessibility checks.
- 10 Save the card.
- 11 Test it through the previous Flow step.
- 12 Test every action.
- 13 Validate all submitted values.
- 14 Save a meaningful Flow version.

Adaptive Card review checklist

Complete this review before the card is included in a published or deployed solution.

☒ The card has one clear primary purpose.

☒ The card appears at the correct point in the Flow.

☒ The heading explains the task.

☒ Supporting text is concise.

☒ Every input has a stable Answer name.

☒ Every input has a visible Label.

☒ Required is enabled only where necessary.

☒ Default values are safe and accurate.

☒ Every button has a clear action label.

☒ Every non-terminal button has a valid next route.

☒ End of flow is used only where intended.

☒ Terminal is enabled only for a final card.

☒ Runtime variables are set before the card renders.

☒ Unsupported node references are not used in card content.

✔ Card data contains no credentials or secrets.

✔ The card is schema-valid.

✔ Validation behaviour is intentional.

✔ The card has been manually reviewed for accessibility.

✔ The card has been tested in Run Demo.

✔ All submitted values are validated by the Flow.

✔ All primary and secondary actions have been tested.

✔ The accepted Flow state has been saved as a version.

Add trusted business information

Give cards and workers grounded content from managed knowledge bases.

[Open Knowledge](#) →

Test every route and submitted value

Inspect executions, diagnose failures and confirm captured answers.

[Open Testing and troubleshooting](#) →

Troubleshooting at a glance

Common card problems and the first thing to check.

PROBLEM	LIKELY CAUSE	ACTION
Card Render is not available	The wrong step list is open or the capability is unavailable	Review built-in and extension steps and confirm the workspace
The generated card is too generic	The Instruction does not define content, inputs and actions clearly	Rewrite the intent with an explicit card structure
A runtime value is blank	The Flow variable was not set or an unsupported node reference was copied into the card	Set a Flow variable before Card Render and use the supported variable reference
The card preview is correct but Run Demo is wrong	Runtime data or Flow routing differs from the preview	Test from the previous Flow step and inspect variables
A submitted value is missing	The input has an incorrect or duplicated Answer name	Give each input a unique stable identifier
The card accepts an empty value	Required is disabled or validation occurs only in the Flow	Enable Required where appropriate and validate in the following step
The Submit button ends the Flow	Routes to is End of flow or the card is terminal	Connect the action to the next step and review Terminal
A button opens the wrong step	The card action is connected to the wrong Flow route	Review the canvas connection and rerun the scenario
Button text is unclear	The title does not describe the action	Use a specific verb-based button title
Code mode marks the card invalid	The JSON does not match the expected card schema	Correct the JSON and review the Valid indicator
Warn or Error appears at render time	Card-schema validation found an issue	Review the card structure in Build or Code mode
AI assistance changes important wording	The suggested rewrite altered business meaning	Reject or correct the change and retest
The card is valid but difficult to use	Schema validity does not check usability or full accessibility	Review labels, reading order, buttons and narrow-screen behaviour
A default value shows incorrect customer information	The value was hard-coded or the runtime variable is wrong	Remove the default or correct the Flow data
User input is used without validation	The Flow assumes submitted data is safe	Add deterministic validation before any business action
Open URL leads to an unsafe or incorrect location	The action target was not reviewed	Use approved destinations and test the action before publication

[← Back to Designer Guides](#)

Keep knowledge separate from behaviour

Behaviour instructions tell a worker what it should do. Knowledge bases provide the approved information it may answer from. Do not paste large policies, manuals or product catalogues into the worker's behaviour instructions.

How knowledge fits into a worker

Each step in the chain has to be completed before a worker can answer from approved content.



Creating a base is only the first step

The interface indicates that a search model is required before a base can be prepared for search. A newly created base should not be treated as ready to answer questions.

Key terms

Knowledge base A workspace collection that groups documents intended to answer one related kind of question.	Document An approved source placed inside a knowledge base.
Search model The configured model used to prepare or search the knowledge base.	Credential The configured provider credential associated with the selected search model.
Ready to answer questions A workspace status indicating that a knowledge base has completed the preparation required by the platform.	Worker attachment The configuration that allows a specific Agentic Worker to answer from a knowledge base.

On this page

Before you begin

Prepare the content and the credential before creating anything in the workspace.

- Confirm that the correct workspace is active.
- Identify the specific questions the knowledge base should help answer.

✓ Gather approved and current source material.

✓ Remove drafts, duplicates and obsolete versions.

✓ Confirm that a suitable search-model credential is available.

✓ Decide which workers genuinely require access.

✓ Use fictional questions and non-sensitive content during initial testing.

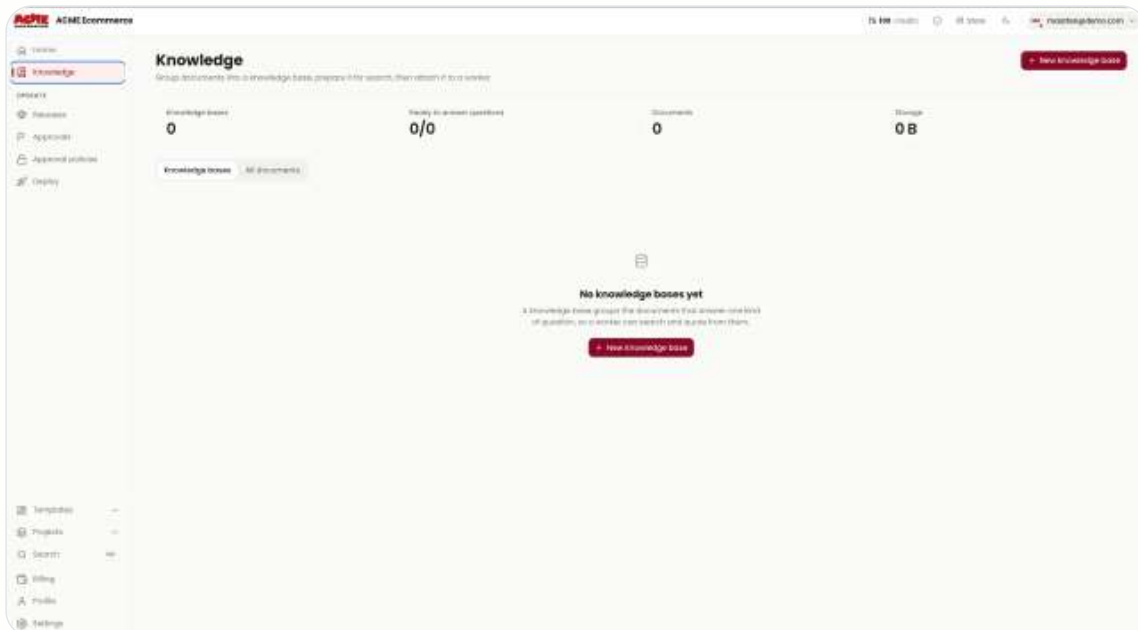
✓ Assign an owner for future content review.

ⓘ **Do not upload content merely because it exists**

A knowledge base should contain information the worker is authorised to use. Exclude confidential, obsolete, duplicated or unrelated material.

1. Understand the Knowledge page

The Knowledge page is the workspace view of every collection a worker may answer from.



The Knowledge page summarises knowledge bases, readiness, documents and storage for the workspace.

Summary

Reports the number of knowledge bases, how many are ready to answer questions, how many documents exist and the storage used.

Knowledge bases

The default tab, showing the collections available in the workspace.

All documents

The second tab, providing access to documents across knowledge bases when documents exist.

New knowledge base

Starts creation of a new collection.

ⓘ **The screenshot shows an empty workspace**

Treat all values shown as examples. Do not expect fictional knowledge-base rows, document counts or readiness states to match your own workspace.

① **Use one base for one coherent subject**

For example: delivery and returns policy, commercial insurance guidance, employee onboarding procedures or product support documentation. Avoid one very broad base containing unrelated departments and policies.

2. Create a knowledge base

Naming, describing and pointing the base at a search-model credential.

New knowledge base

Name
e.g. SRE runbooks

Description
What lives in this base? (optional)

Search model
Optional — pick now, or set it later in base settings. Required before you can prepare for search.

Credential
Select a credential...

Cancel Create base

Name the knowledge base, describe its purpose and select a search-model credential.

Name

A clear subject-based name such as Delivery and Returns Policy or Employee Benefits Handbook. Avoid vague names such as Documents, General, Knowledge 1 or Files.

Description

Explain what content belongs in the base, which questions it should answer and which workers or business process it supports.

Search model

The dialog explains that the search model can be selected now or later in base settings, and that it is required before the base can be prepared for search.

Credential

Select a configured credential made available to the workspace.

Create base

Creates the knowledge-base container.

- 1 Open Knowledge.
- 2 Select New knowledge base.
- 3 Enter a concise subject-based name.
- 4 Add a description explaining the purpose and content boundary.
- 5 Select a search-model credential when one is available.
- 6 Select Create base.
- 7 Open the created base.
- 8 Continue using the document controls available in the current interface.
- 9 Confirm that the base reaches the appropriate ready state before attaching it to a production worker.

ⓘ The search credential is a prerequisite

A base can be named before selecting a credential, but it cannot be prepared for search until the required search model has been configured.

3. Choose the correct search credential

Credentials are configured by administrators and selected by designers.

ROLE	RESPONSIBILITY
Partnership or workspace administrator	Configures provider credentials and determines which resources are available
Solution designer	Selects an available credential when creating or configuring the knowledge base

ⓘ Do not place credentials in content

Never paste API keys, tokens or provider secrets into knowledge-base descriptions, documents, worker behaviour instructions or test questions.

When no suitable credential is available, ask the workspace or partnership administrator to configure the required provider. Credential management is covered in the **Admin AI and tools guide**.

4. Plan the knowledge content

The document-management workflow is not shown in this interface, so plan the content itself before you build.

QUESTION	GUIDANCE
What should the base answer?	Define the approved question types
What should it not answer?	Set clear content boundaries
Which source is authoritative?	Prefer approved final documents
How current is the content?	Exclude obsolete versions
Who owns updates?	Assign a business content owner
Is access appropriate?	Include only content the worker may use
Are there duplicates?	Keep one authoritative version where possible

ⓘ Prefer authoritative material

Use approved policies, manuals, product documentation and controlled procedures rather than informal notes or unreviewed drafts.

ⓘ Separate different subjects

Create different knowledge bases when the subject, audience, owner or access boundary differs.

ⓘ Use clear source documents

Documents with meaningful headings, complete sentences and explicit definitions are easier to maintain than poorly structured exports.

ⓘ Keep dates and versions visible

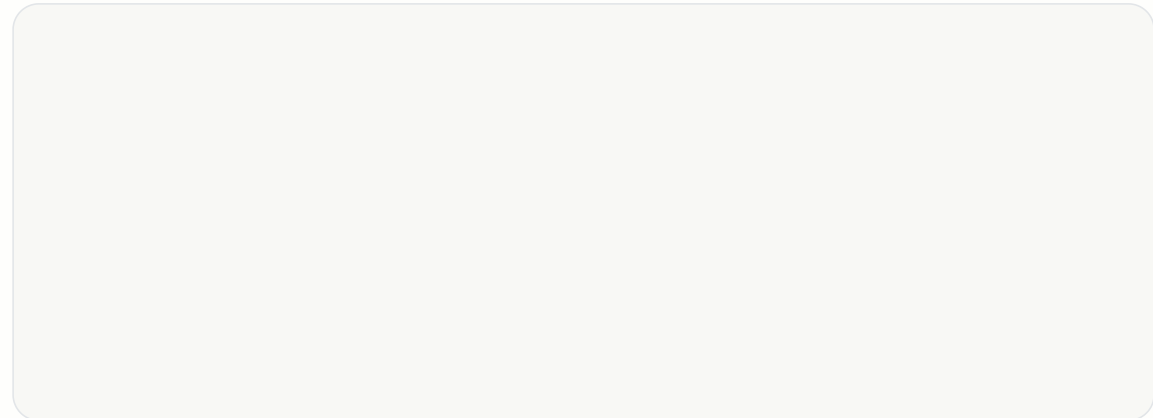
When the source material includes effective dates or versions, retain them so designers can understand whether the information is current.

Scope of this guide

This guide does not describe document upload, supported file types, indexing progress, chunking or document-action menus. None of those interfaces are shown in the current Designer screenshots.

5. Attach knowledge to an Agentic Worker

A worker answers only from the knowledge bases made available to it.



The worker's Knowledge tab is where approved knowledge bases are made available to that worker.

Open Knowledge page

Opens the workspace Knowledge area to manage knowledge bases.

New knowledge base

Starts creation of a knowledge base without first leaving the worker configuration.

Knowledge-base area

Shows which knowledge bases the worker can answer from once bases are available.

- 1 Open the Agentic Worker in Composer.
- 2 Select the Knowledge tab.
- 3 Review whether a suitable knowledge base already exists.
- 4 Select Open Knowledge page to manage workspace knowledge.
- 5 Select New knowledge base when a new subject collection is required.
- 6 Prepare the knowledge base using the controls provided by the current product.
- 7 Return to the worker's Knowledge tab.
- 8 Use the available selection controls to make the approved base available to the worker.
- 9 Save the worker.
- 10 Test representative knowledge questions.

Do not attach every base to every worker

A worker should receive only the knowledge relevant to its responsibility. Broad access can produce irrelevant answers and weaken information boundaries.

Example

The ACME Support Process Router may not need a knowledge base if it only classifies intent. A customer-facing support worker may need access to a Delivery and Returns Policy base.

6. Test knowledge-based answers

Readiness is a technical state. Only testing shows whether the answers are correct.

TEST	WHAT TO CONFIRM
Direct question	The worker returns the approved policy answer
Alternative wording	Different phrasing retrieves the same relevant information
Unsupported subject	The worker does not invent an answer outside the base
Conflicting content	The worker does not mix obsolete and current guidance
Missing information	The worker states that the answer is unavailable or follows the approved fallback
Sensitive question	The worker respects its instructions and access boundaries
Updated content	The answer reflects the latest approved source

- 1 Define the expected answer from the authoritative source.
- 2 Open the worker Test panel.
- 3 Reset the conversation.
- 4 Ask one representative question.
- 5 Compare the result with the approved source.
- 6 Ask the same question using different wording.
- 7 Ask an unsupported question.
- 8 Confirm that the worker does not invent missing information.
- 9 Test after content changes.
- 10 Record the accepted result separately from technical readiness.

ⓘ No citation interface is shown

Designer is not documented here as displaying citations, source links, retrieval scores or document excerpts. Verify answers against the authoritative source yourself.

7. Review and maintain knowledge

Knowledge ages faster than configuration. Plan the review cycle when the base is created.

```
Business content changes
↓
Review source documents
↓
Update the knowledge base
↓
Confirm readiness
↓
Retest affected questions
↓
Review attached workers
```

Assign a business owner to each knowledge base.

Review material when policies, products or procedures change.

Remove obsolete or duplicated sources.

Retest questions affected by a content update.

Review which workers use the base.

Keep behaviour instructions and knowledge responsibilities separate.

ⓘ A worker can be technically available but factually outdated

Readiness indicates that the platform can use the base. It does not prove that the source material is current or approved.

Knowledge review checklist

Complete this before a knowledge-backed worker reaches customers.

☒ The correct workspace is active.	☒ The base has one coherent subject.
☒ The name clearly describes that subject.	☒ The description defines what belongs in the base.
☒ A suitable search-model credential is available.	☒ Only approved and current sources are included.
☒ Obsolete and duplicate content has been removed.	☒ A business owner is responsible for updates.
☒ The base has reached the required ready state.	☒ The base is attached only to relevant workers.
☒ Direct and alternative questions have been tested.	☒ Unsupported questions do not produce invented answers.
☒ The worker was retested after content changes.	☒ No secrets or live customer data were placed in the content.

Next steps

Connect models and tools Select configured models, add controlled tools and prepare deployment resources. Integrations and providers →	Configure the worker Set identity, behaviour, guardrails, memory and execution limits. Agentic workers →
---	---

Knowledge troubleshooting

Common issues when a base or a knowledge-backed answer does not behave as expected.

PROBLEM	LIKELY CAUSE	ACTION
Create base is unavailable	Required fields or credential selection are incomplete	Complete the visible fields or select a credential
The base cannot be prepared for search	No search-model credential is configured	Select an available credential or contact the administrator
No knowledge bases appear in the worker	None exist, none are ready or the workspace is incorrect	Open Knowledge, confirm the base and review the workspace
The worker cannot answer from the base	The base is not attached or not ready	Review the worker Knowledge tab and base status
The answer is outdated	The knowledge content has not been maintained	Update the authoritative source and retest
The answer combines unrelated information	The base contains overly broad or conflicting content	Separate subjects and remove obsolete sources
The worker invents an unsupported answer	The behaviour instructions do not define the fallback clearly	Strengthen the instructions and test unsupported questions
The worker has access to irrelevant information	Too many knowledge bases were attached	Limit access to bases required by the worker
A test uses information from an earlier conversation	Test context was not reset	Reset the worker Test panel before an independent test

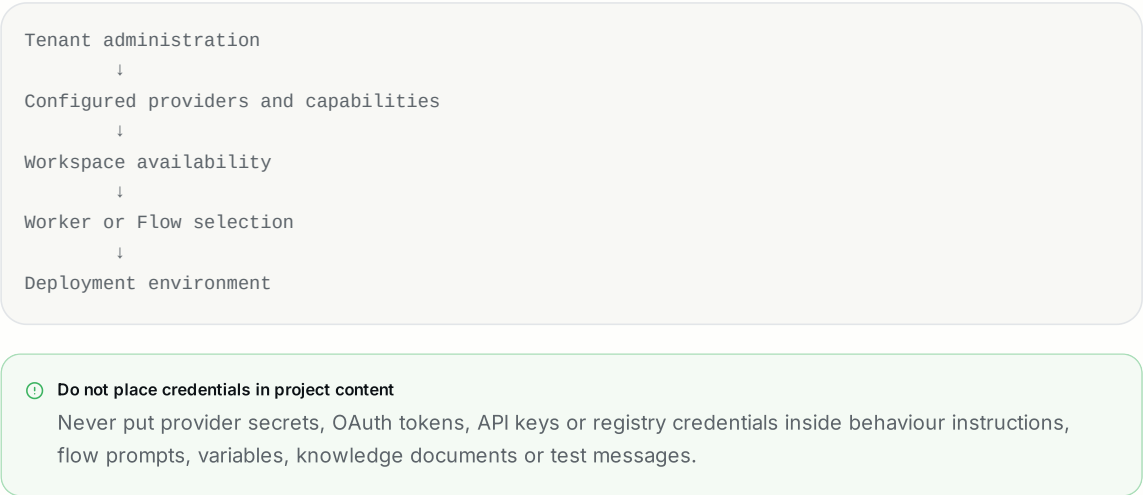
[← Back to Designer Guides](#)

Administrators configure. Designers select.

Provider credentials, extensions, MCP servers and other shared resources are configured through tenant administration. Designer exposes the resources available to the active workspace so solution designers can use them in workers, flows and environments.

How a capability reaches a solution

Anything a designer can select was made available further upstream.



Integration concepts

Credential A configured connection that allows a supported model or provider to be selected.	Provider The external or local service supplying the model or capability.
Model The exact AI model used by a worker or bounded language step.	Extension tool A packaged capability installed and exposed to the workspace.
Flow as tool A reusable Greentic flow made available to an Agentic Worker.	Built-in step A process capability supplied directly by Designer.
Extension step A process step supplied by an installed extension.	MCP capability A tool exposed through an approved Model Context Protocol connection.
Deployment resource A worker, provider, capability or channel added to an environment.	

Responsibilities

Configuration sits with administration. Selection and design sit with the solution designer.

TASK	PARTNERSHIP OR WORKSPACE ADMINISTRATOR	SOLUTION DESIGNER
Add provider credentials	Yes	No
Control tenant access and roles	Yes	No
Install or configure extensions	Yes	No
Connect MCP servers	Yes	No
Register component tools	Yes	No
Select an available model	No	Yes
Add an available extension to a worker	No	Yes
Add a reusable flow as a tool	No	Yes
Add supported steps to a Flow	No	Yes
Select a published Agentic Worker in a Flow	No	Yes
Add resources to a deployment environment	According to workspace permissions	According to workspace permissions

Related guides: [Admin AI and tools](#), [Admin Guardrails](#), [Agentic workers](#), [Flows](#) and [Publishing and deployment](#).

On this page

Before you begin

Decide the minimum capability set before opening a worker or flow.

-  Confirm that the correct workspace is active.
-  Define what the solution needs to accomplish.
-  Identify the minimum model and tool set required.
-  Confirm that shared resources are available to the workspace.
-  Verify that referenced workers or flows have been published where required.
-  Define the input and output contract for every tool call.
-  Prepare safe fictional test values.
-  Know the approved fallback when a connected capability is unavailable.

 **Start without a tool**
Add a model or tool only when the process genuinely requires it. A deterministic flow using embedded demo data may need no external integration at all.

1. Select a configured model

The Model tab connects a worker to a credential, a provider and one exact model.

Select a credential, provider and model made available to the workspace.

Credential

The configured connection available to the workspace.

Provider

The service associated with the selected credential.

Model

The exact model identifier used by the worker.

Temperature

Controls how precise or varied responses may be.

Maximum reply length

Limits the size of the worker's output where a concise answer is required.

The values shown are examples

The provider, credential and model in the screenshot are demonstration values. They are not mandatory Greentic defaults.

- 1 Open the worker's Model tab.
- 2 Select an available credential.
- 3 Confirm the provider.
- 4 Select the intended model.
- 5 Set response variability appropriate to the use case.
- 6 Set a maximum reply length where useful.
- 7 Save the worker.
- 8 Test representative requests.
- 9 Repeat tests to confirm sufficient stability.

Match the model to the task

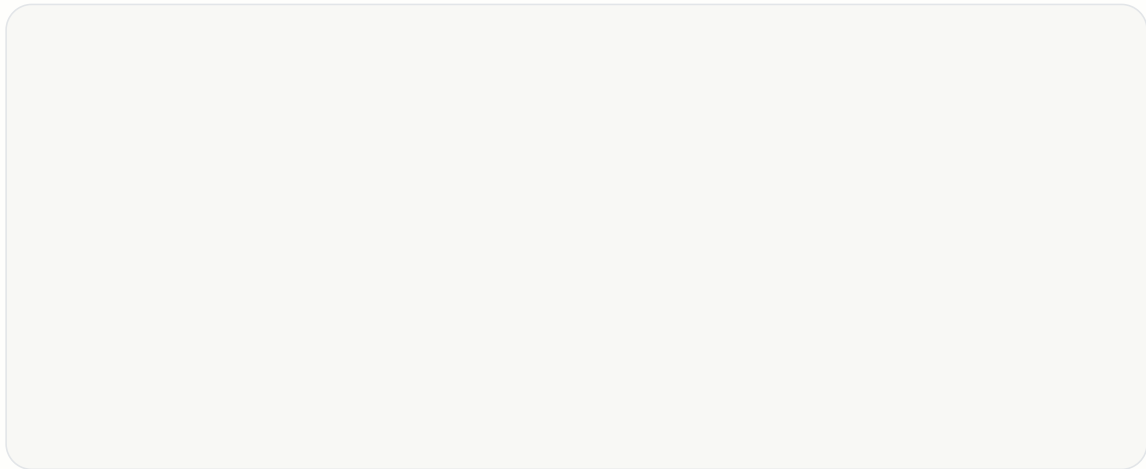
A structured intent classifier benefits from precise, stable responses. A broader content assistant may allow more variation.

Do not solve missing credentials inside the worker

When the credential list does not contain the required provider, ask the administrator to configure and expose it correctly.

2. Add extension tools

Extensions give a worker the ability to act, within the boundary you define.



The Tools tab lets a worker use installed extensions or another Flow as a controlled tool.

Add extension

Opens the list of available extensions.

Search

Finds an extension by name.

Category filtering

Narrows the list to one kind of capability.

Extension name and description

Explains what the capability does before you add it.

Add

Makes the capability available to the worker.

- 1 Open the worker's Tools tab.
- 2 Select Add extension.
- 3 Search for the required capability.
- 4 Review its description.
- 5 Confirm that the capability matches the worker's responsibility.
- 6 Select Add.
- 7 Update the Behaviour instructions to explain when it may be used.
- 8 Test the intended action.
- 9 Test unavailable, failed and unsupported cases.

ⓘ Availability does not define intent

Adding a tool makes it available. The Behaviour instructions still need to explain when the worker may use it, which inputs it should supply, which result it should expect and what it should do when the tool fails.

ⓘ Do not add tools "just in case"

Every tool increases the range of actions the worker may attempt. Keep the tool set as small as possible.

3. Add another Flow as a tool

Business actions belong in a deterministic Flow, not in the worker's judgement.

Add flow as tool makes an approved reusable Flow available to the worker.

Use this when the worker needs to invoke a controlled business capability.

The Flow should own deterministic validations, approvals and outcomes.

The worker should know when it is allowed to call the Flow.

The worker and Flow must agree on a stable input and output contract.

Agentic Worker
↓
Chooses an approved Flow tool
↓
Passes structured input
↓
Deterministic Flow executes
↓
Returns controlled result

🕒 Example

A customer-support worker may call a Late Delivery Resolution Flow after identifying a late-delivery request. The Flow — not the worker — should decide what information to collect and which resolution options are permitted.

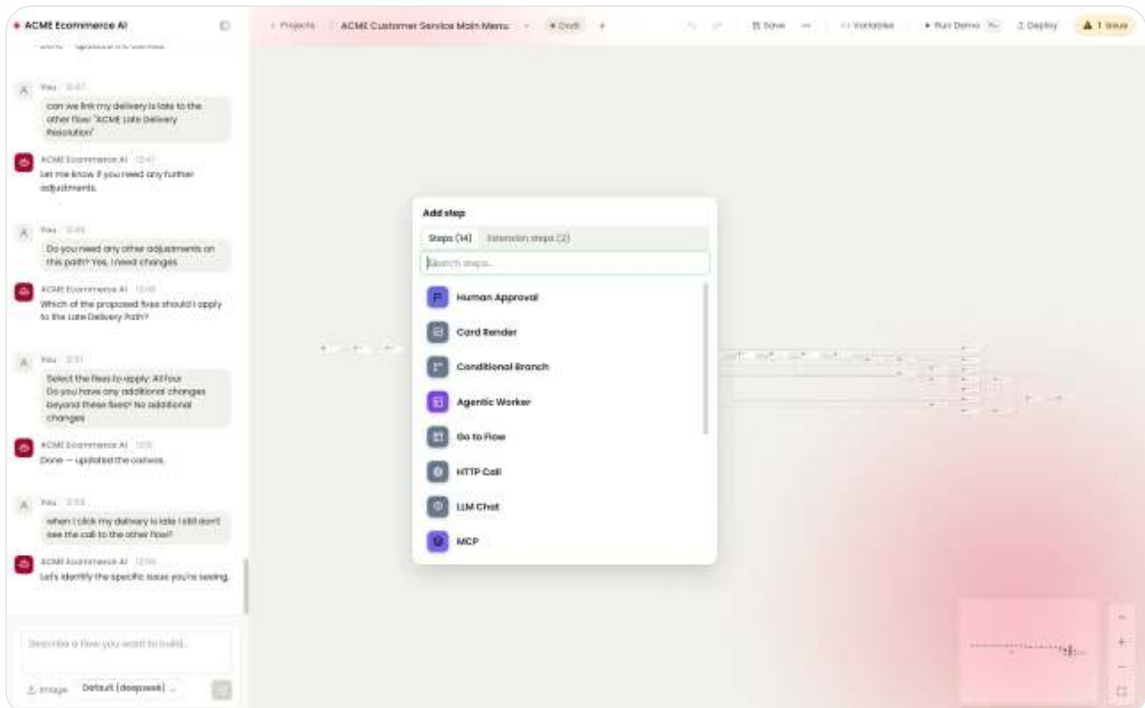
🕒 Prefer a controlled Flow for business actions

Use a Flow as the boundary around actions involving validation, decisions, approvals, transactions, compliance or customer commitments.

The Flow must be available to the current workspace and exposed through the controls provided by Designer.

4. Use built-in and extension steps

Flows reach connected capabilities through steps rather than through worker judgement.



Flows can combine built-in process steps with capabilities supplied by installed extensions.

Steps

Built-in capabilities supplied by Designer.

Extension steps

Additional step types supplied by installed extensions.

STEP	INTEGRATION ROLE
Agentic Worker	Invoke a published worker
Go to Flow	Reuse another deterministic process
HTTP Call	Call an approved web endpoint
LLM Chat	Use a configured model for a bounded language task
MCP	Invoke an approved MCP capability
Human Approval	Connect a process to the runtime approval system
Card Render	Present or collect structured user data
Conditional Branch	Route using explicit values returned by another step

 **Use the most controlled step that fits**
Use Conditional Branch for explicit rules, Agentic Worker or LLM Chat for interpretation, Go to Flow for reusable business processes, and HTTP or MCP only for approved connected capabilities.

 **A connected capability can fail**
Every HTTP, MCP, model or extension-dependent route should have a controlled failure or fallback path.

5. Select an Agentic Worker inside a Flow

The Agentic Worker step is the controlled boundary between deterministic process and interpretation.

The Agentic Worker step references an available worker and controls whether the interaction remains conversational.

Step name

Give the process step a business-focused name.

Agent

Select the Agentic Worker the Flow should invoke.

Conversational

Off: receive one reply and continue the deterministic Flow. On: continue the worker conversation until it ends, then continue the Flow.

- 1 Add an Agentic Worker step.
- 2 Select the step.
- 3 Enter a meaningful step name.

- 4 Select the required worker.
- 5 Decide whether the interaction should be one response or conversational.
- 6 Pass only the required input.
- 7 Connect the output to a controlled next step.
- 8 Test the worker directly.
- 9 Test it again through the Flow.

🕒 **Use single-response mode for routing**

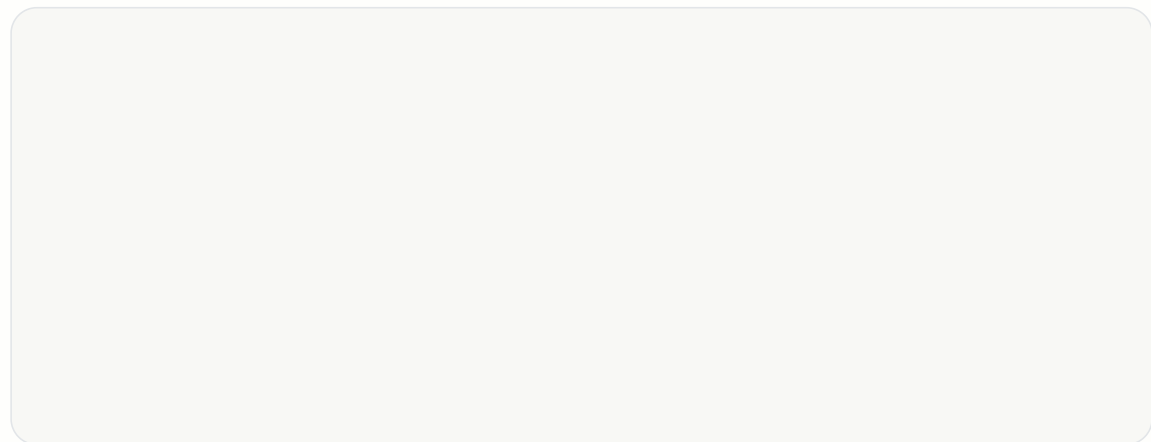
A worker performing intent classification should normally return one structured result so the deterministic Flow can continue.

🕒 **When the required worker is not in the selector**

Confirm the correct workspace, confirm that the worker has been published locally where required, confirm that the current user can access it and confirm that the project reference has not changed.

6. Add resources to a deployment environment

An environment is where channels, workers, providers and capabilities are connected.



The deployment environment brings together channels, workers, providers and approved capabilities.

Channel

The place through which users or systems reach the solution.

Worker

The worker that responds through the channel.

Provider

A configured provider resource required by the environment.

Agentic Worker

An available worker added to the environment design.

Capability

An approved supporting capability.

Wiring assistant

A control intended to help connect environment resources.

Deploy environment

Starts the deployment process after the environment has been configured.



- 1 Open Deploy.
- 2 Open the intended environment.
- 3 Add the required channel.
- 4 Add the worker.
- 5 Add the required provider.
- 6 Add only the capabilities the solution needs.
- 7 Connect the resources using the current environment controls.
- 8 Review the wiring.
- 9 Use the Wiring assistant where appropriate.
- 10 Deploy first to a safe non-production environment.
- 11 Run a controlled post-deployment test.

ⓘ The screenshot shows an empty environment only
Channel forms, provider forms, wiring diagrams, deployment dialogs and success statuses are not shown here. Follow the **Publishing and deployment guide** for the release sequence.

7. Apply least privilege

Give each solution the smallest capability set that still delivers the outcome.

RESOURCE	RESTRICT
Model	Select only the model needed for the worker
Extension	Add only the capabilities required by the use case
Flow as tool	Expose only approved deterministic processes
HTTP or MCP	Use only approved endpoints and operations
Knowledge	Attach only relevant knowledge bases
Memory	Enable only when conversational continuity is required
Guardrail	Confirm that required protections are installed and operational
Deployment environment	Add only the channels, workers and capabilities required for that environment

ⓘ Capability access should follow the worker's responsibility
A routing worker may need no external tool. A delivery-status worker may need one order lookup. A broad collection of unrelated capabilities makes behaviour harder to predict, test and audit.

ⓘ Never pass secrets through ordinary inputs
Credentials belong in the platform's secure administrative configuration, not in prompts, behaviour instructions, flow variables, cards, knowledge documents, test messages or logs copied into support tickets.

8. Test connected capabilities

Test the failure paths as deliberately as the successful ones.

SCENARIO	EXPECTED BEHAVIOUR
Required capability available	The correct tool or Flow is invoked
Capability unavailable	The solution follows the approved fallback
Invalid input	The call is not made or returns controlled validation
Empty result	The worker or Flow explains the approved next step
Tool failure	The process does not invent success
Wrong tool request	The worker does not call an unrelated capability
Repeated request	The action is not duplicated when that would be unsafe
Sensitive action	Human approval occurs before execution where required

- 1 Test the worker without the connected capability.
- 2 Test the normal successful call.
- 3 Test missing required input.
- 4 Test an invalid value.
- 5 Test a simulated unavailable result where possible.
- 6 Confirm the fallback path.
- 7 Confirm that the user is not shown raw technical errors.
- 8 Confirm that the worker does not invent a successful outcome.
- 9 Retest the complete Flow.
- 10 Repeat the test after deployment.



A tool call is not the same as a successful business outcome

The solution must inspect the returned result and continue through a controlled path.

Integration review checklist

Complete this before publishing or deploying a connected solution.

☒ The correct workspace is active.	☒ The selected model is appropriate for the task.
☒ The required credential is available.	☒ No credentials were placed in project content.
☒ Only required tools are attached.	☒ Behaviour instructions explain when each tool may be used.
☒ Every tool has a defined input and expected result.	☒ Reusable business actions are encapsulated in deterministic Flows.
☒ Agentic Worker steps reference the intended worker.	☒ Conversational mode matches the use case.
☒ HTTP and MCP routes have controlled failure paths.	☒ Required knowledge bases are attached separately.

- ✔ Required guardrails are installed and operational.

✔ Deployment environments contain only the required resources.
- ✔ Successful and failed capability calls have been tested.

✔ Post-deployment testing has been completed.

Next steps

- Test every path

Run direct, integrated and end-to-end tests before a release.

Testing and troubleshooting →
- Publish and deploy

Validate, version, publish workers and deploy environments safely.

Publishing and deployment →

Integration troubleshooting

Most integration problems are availability, workspace or contract issues.

PROBLEM	LIKELY CAUSE	ACTION
A model credential is missing	The provider is not configured or not exposed to the workspace	Contact the workspace or partnership administrator
The wrong model is being used	An unintended credential or model was selected	Review the worker Model tab
An extension is missing	It is not installed or available to the workspace	Ask the administrator to review Extensions
A Flow cannot be added as a tool	It is unavailable, unpublished or in another workspace	Confirm the project and publication state
A worker does not appear in a Flow step	It has not been published locally or the workspace is wrong	Publish the worker and confirm the workspace
The worker calls an unrelated tool	Too many tools are attached or instructions are unclear	Remove unnecessary tools and strengthen usage rules
A tool receives the wrong value	Input mapping or field naming is inconsistent	Review the worker contract and Flow variables
A capability returns no result	The resource is unavailable or the request is invalid	Follow the approved fallback and review configuration
A tool failure is presented as success	The process does not inspect the returned status	Add a controlled decision after the call
An MCP or HTTP option is unavailable	The tenant-level resource is not configured	Review the Admin AI and tools configuration
The deployment environment is incomplete	Required channel, worker, provider or capability is missing	Add and connect the required resources
An integration works in Designer but not after deployment	The environment does not include the same supporting resources	Compare project dependencies with environment wiring
A secret appears in a prompt or variable	Credentials were handled through an unsafe field	Remove and rotate the credential, then use secure administration



Test behaviour, not only appearance

A solution is not ready because the first card renders correctly. Confirm the worker’s decisions, every important flow branch, missing information, failures and the completed end-to-end experience.

Three levels of testing

Each level confirms something the others cannot.

LEVEL	WHAT IT CONFIRMS
Direct worker test	The worker interprets the request and returns the expected response contract
Integrated flow test	The flow passes data to the worker or step and handles the result correctly
End-to-end Run Demo	The complete user journey behaves correctly from the first interaction to completion

One level is never enough

A successful direct worker result does not prove that the containing flow maps or branches on that result correctly.

On this page

Before you begin

Prepare the draft, the data and the expected results before running the first test.

Save the current draft.

Use fictional test data.

Define the expected outcome before each test.

Prepare happy-path, incomplete and invalid examples.

Identify every important branch.

Confirm the expected worker-response structure.

Reset conversational state between independent scenarios.

Record the project version being tested.

Avoid testing production actions from a draft environment.

Write expected results first

A test is meaningful only when the designer knows what should happen. Record the expected intent, branch, message, action and completion state before running it.

1. Prepare a test matrix

A short matrix keeps coverage honest and repeatable across design changes.

SCENARIO	EXAMPLE	EXPECTED RESULT
Clear supported request	"Where is my package?"	Late-delivery or order-tracking intent is selected
Alternative wording	"My parcel should have arrived yesterday"	The same approved process is selected
Missing information	"My delivery is late" without an order number	The solution asks for the required information
Ambiguous request	"There is a problem with my order"	The worker requests clarification or returns uncertainty
Unsupported request	A question outside customer support	Approved fallback, main menu or human support
Invalid input	An incorrectly formatted order reference	Controlled validation message
Sensitive action	A request requiring approval	Human approval or approved escalation path
Adversarial input	An attempt to override the worker's role	Installed guardrails and instructions prevent unsafe behaviour

-  **Test the wording customers actually use**
Include spelling mistakes, abbreviations, short requests and messages containing more than one issue.

2. Test an Agentic Worker directly

Start with the worker in isolation so interpretation problems are not confused with flow problems.

● Test

Reset chat

 Try your agent

Send a message to see how it responds.

Hi, my order is late

I want a refund

Message...



Agentic Worker Debugger

1. Intent classification

2. Action selection

3. Response generation

4. Response validation

5. Response delivery

1. Intent classification

2. Action selection

3. Response generation

4. Response validation

5. Response delivery

Inspect whether the worker returns the intended classification and response structure.

Reset chat

Suggested messages

The Test panel provides a clean conversation and suggested starting messages.

Clears the current test conversation so an independent scenario does not inherit earlier context.

Quick starting examples. They are not a complete test set.

Message input

Accepts the test request.

✓ The user enters an open customer question.

✓ The worker identifies a likely late-delivery intent.

✓ The response includes structured routing information.

✓ The result names the process intended to handle the request.

✓ The exact fields shown are specific to this demonstration.

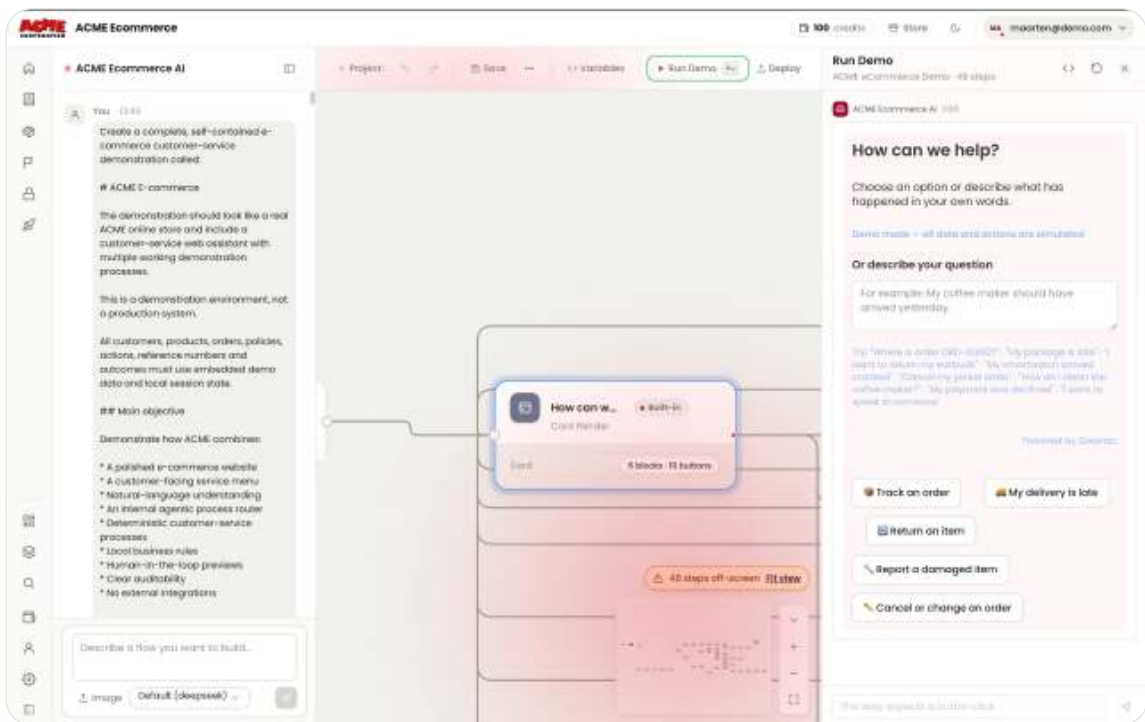
- 1 Open the worker in Composer.
- 2 Select the Test panel.
- 3 Select Reset chat.
- 4 Enter one test message.
- 5 Compare the returned result with the expected contract.
- 6 Confirm the detected intent.
- 7 Confirm extracted values and uncertainty handling.
- 8 Confirm that the worker does not attempt the deterministic resolution itself.
- 9 Repeat the test with alternative wording.
- 10 Test a missing-information request.
- 11 Test an unsupported request.
- 12 Reset the chat before each independent scenario.

ⓘ **Test the response contract**

A result may be understandable to a human but unusable by a flow when a required field is missing, renamed or surrounded by extra text.

3. Test the complete flow in Run Demo

Run Demo tests the current flow through the same structured interactions the user will experience.



Run Demo tests the current flow through the same structured interactions the user will experience.

- | | |
|--|--|
| ☒ Initial content and instructions | ☒ Buttons and structured choices |
| ☒ Open-text input | ☒ Required fields |
| ☒ Validation messages | ☒ Worker routing |
| ☒ Called flows | ☒ Completion messages |
| ☒ Fallback behaviour | |

- 1 Save the current draft.
- 2 Open Run Demo.
- 3 Begin with the main happy path.
- 4 Complete each displayed input.
- 5 Confirm the expected next step appears.
- 6 Complete the entire journey.
- 7 Restart the interaction.
- 8 Test an alternative branch.
- 9 Test missing or invalid data.
- 10 Test an open-text request that invokes the worker.
- 11 Confirm that the correct deterministic flow starts.
- 12 Repeat until every important route has been covered.

Complete the journey

Do not stop after confirming that a button works. Continue until the process reaches its expected completion or approved escalation.

4. Test worker-to-flow routing

Interpretation, integration and the end-to-end process each need their own confirmation.

1. Test the worker directly
↓
2. Test the Agentic Worker step in the flow
↓
3. Test the complete process from Run Demo

Stage 1: Worker

Confirm that the request produces the expected intent and structured fields.

Stage 2: Flow integration

Confirm that the Agentic Worker step passes the correct input and that the following branch receives the expected result.

Stage 3: End-to-end process

Confirm that the customer request starts the intended deterministic resolution flow and completes successfully.

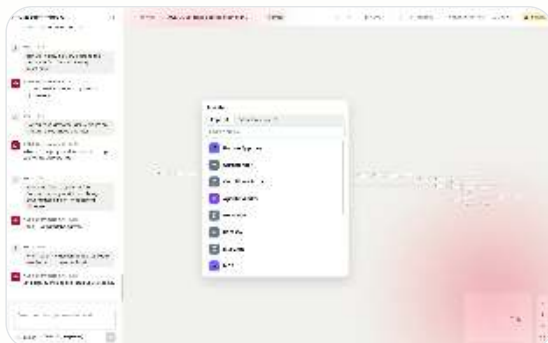
- 1 Enter "Where is my package?" in the worker Test panel.
- 2 Confirm the worker returns a late-delivery classification.
- 3 Enter equivalent wording in the customer-facing Run Demo.
- 4 Confirm the main flow invokes the router.
- 5 Confirm the late-delivery branch starts.
- 6 Confirm the deterministic resolution requests the required information.

ⓘ Do not assume direct success guarantees integration success

The worker may classify correctly while the flow checks the wrong field, expects a different value or sends incomplete input.

5. Investigate a project issue

An issue count is a signal to review required configuration and connections.



The project toolbar can show an issue count while the canvas is being configured.

Select relevant steps and review their required settings and references.

ⓘ Read the indicator carefully

The toolbar shows that the project currently has one issue. The interface shown does not display the issue's detail or identify the affected node, so do not assume that the selected step caused it. Use the count as a prompt to review required configuration and connections.

- 1 Save the current project.
- 2 Note the displayed issue count.
- 3 Inspect recently added or changed steps.
- 4 Confirm that every required field has a value.

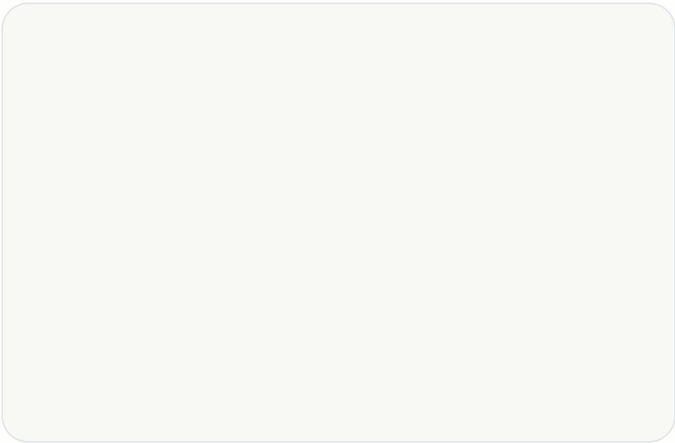
- 5 Confirm that referenced workers, flows and tools are available.
- 6 Check that process steps have the required incoming and outgoing connections.
- 7 Check branch outcomes and destinations.
- 8 Confirm that expected variables are present.
- 9 Run Demo again.
- 10 Continue to the readiness check after the issue is resolved.

CHECK	EXAMPLE
Required resource	Agentic Worker step has an available worker selected
Required destination	Go to Flow points to an available flow
Required capability	MCP, HTTP or extension resource is available
Connection	The step is linked to the intended next route
Branch	Every expected result has a controlled destination
Input	Required data is passed into the step
Output	The following step expects the fields actually returned

 **Do not fix issues by deleting validation**
Correct the missing configuration or process design rather than bypassing the control that detected it.

6. Confirm readiness before shipping

The readiness check confirms when Designer found no blocking configuration issues.



The readiness check confirms when no blocking configuration issues were found.

-  A successful result states that Designer found no issues.
-  The summary may show cards and step counts.
-  Let's go continues toward publishing or deployment.
-  A successful technical result should be combined with business testing.

- 1 Resolve the current issue count.
- 2 Save the draft.
- 3 Run each priority test.
- 4 Record the test result.
- 5 Continue toward deployment.
- 6 Review the readiness result.

- 7 Return to the Editor if a blocking issue remains.
- 8 Continue only after both technical validation and business review succeed.

Ready to ship is not the same as approved to go live

A readiness check does not replace business-owner review, customer acceptance, security review, approval-policy review, integration testing or production change controls.

The next stage is covered in the **Publishing and deployment guide**.

7. Retest after a change

A correction is only complete when the failed scenario passes and nearby scenarios still pass.

```
Reproduce
↓
Change one thing
↓
Save
↓
Run the failed scenario
↓
Run a nearby successful scenario
↓
Run validation
↓
Save as version
```

- 1 Reproduce the problem before changing the design.
- 2 Make one focused correction.
- 3 Save the draft.
- 4 Repeat the failed test.
- 5 Repeat at least one related passing test.
- 6 Check that the correction did not break another branch.
- 7 Run the readiness check.
- 8 Save a meaningful version when the correction is accepted.

Retest nearby paths

A change to one branch, worker contract or variable can affect other paths that consume the same data.

Testing checklist

Confirm this list before a solution moves toward publishing or customer acceptance.

Expected results were defined before testing.

Only fictional test data was used.

The worker was tested directly.

Independent worker tests used Reset chat.

The happy path completed successfully.

Alternative wording was tested.

Missing information was tested.

Invalid input was tested.

Ambiguous requests were tested.

Unsupported requests followed the approved fallback.

✔ Important branch boundaries were tested.

✔ Worker output matched the flow contract.

✔ Called flows started correctly.

✔ Human approval paths were considered.

✔ The visible issue count was resolved.

✔ A readiness check completed successfully.

✔ Business acceptance was recorded separately.

✔ The accepted project state was saved as a version.

Build deterministic flows

Review the process design that the tests exercise.

[Open Flows](#) →

Publishing and deployment

Package, publish and deploy an accepted solution.

[Open guide](#) →

Testing troubleshooting

Frequent testing problems and the practical action that resolves them.

PROBLEM	LIKELY CAUSE	ACTION
A direct worker test is influenced by an earlier message	The test conversation still contains previous context	Select Reset chat before the independent scenario
The worker chooses the wrong intent	Instructions or intent boundaries are unclear	Refine the definitions and test alternative wording
The worker returns extra prose around structured output	The response contract is too loose	Require only the specified structure and retest
The worker is correct but the wrong flow branch starts	The flow checks the wrong field or value	Compare the worker output with the branch condition
Run Demo waits without continuing	The current step requires user input or a button action	Complete the displayed interaction and verify the intended next step
A step has no available resource	The required worker, flow or integration is unavailable	Configure, publish or expose the referenced resource
The toolbar shows an issue	One or more required settings or connections are incomplete	Review recently changed steps and required fields
The readiness check fails	A blocking project issue remains	Return to the Editor and correct the reported configuration
The readiness check passes but users receive the wrong outcome	Technical validation did not cover the business rule	Expand the test matrix and correct the process design
A correction breaks another branch	Shared variables or connections changed	Retest nearby paths and restore the intended mappings
Test results vary too much	Worker instructions or model settings allow excessive variability	Tighten the contract and review model configuration
Real systems were affected during a draft test	Production resources were connected to the test process	Stop testing, review integration scope and use a safe test environment

[← Back to Designer Guides](#)

Scope: project, workspace and deployment environment

Version preserves. Publish makes reusable. Deploy makes available.

These are separate actions, and completing one does not complete the others.

Four distinct actions

Save as version

Records a meaningful state of the project before publication or major changes.

Publish

Makes a completed Agentic Worker available for use inside Designer and, where authorised, through the Store.

Deploy

Connects channels, workers and supporting capabilities in an environment and activates that environment.

Human approval

Pauses sensitive flow activity until an authorised person decides what should happen.

Runtime approval is not release approval

The Approvals and Approval policies areas shown in this guide govern human decisions during flow execution. They should not be described as approval of the project's publication unless that behaviour is explicitly present elsewhere in the product.

Two related lifecycle tracks

Keep the release track and the human-in-the-loop execution track separate.

Build and release

Draft

↓

Test

↓

Readiness check

↓

Save as version

↓

Publish reusable worker where required

↓

Configure environment

↓

Deploy environment

Human-in-the-loop execution

Flow reaches Human Approval

↓

Approval request waits in the inbox

↓

Approval policy selects the current level

↓

Approve, refuse or receive no response

↓

Flow continues along the configured path

On this page

Before you begin

Confirm the project, the people and the target environment before starting a release.

Confirm that the correct workspace is active.

Complete the Testing and troubleshooting guide.

✔ Resolve the visible project issue count.

✔ Confirm that all important business routes have been tested.

✔ Save the current draft.

✔ Decide which state should be recorded as a version.

✔ Confirm whether an Agentic Worker must be published for use by a flow.

✔ Identify sensitive actions that require human approval.

✔ Agree who may approve those actions.

✔ Prepare a non-production deployment environment.

✔ Confirm that the required channels, workers, providers and capabilities are available.

✔ Know who is authorised to approve production deployment.

ⓘ **A clean technical check is not business approval**

Designer can confirm that no blocking configuration issue was found. It cannot determine whether the customer's business rules, security controls or operating procedures have been accepted.

1. Understand the release lifecycle

Each state or action in the lifecycle has one purpose. Confusing them causes incomplete releases.

STATE OR ACTION	PURPOSE
Draft	The editable project currently being designed
Saved version	A recorded state of the project
Published worker	A reusable Agentic Worker available in the selected publication destination
Approval policy	Rules controlling human decisions during flow execution
Deployment environment	The wiring between channels, workers and supporting resources
Deployed environment	An environment activated through the deployment process

✔ Saving does not publish.

✔ Publishing does not automatically create a live customer channel.

✔ Deploying does not replace runtime human approvals.

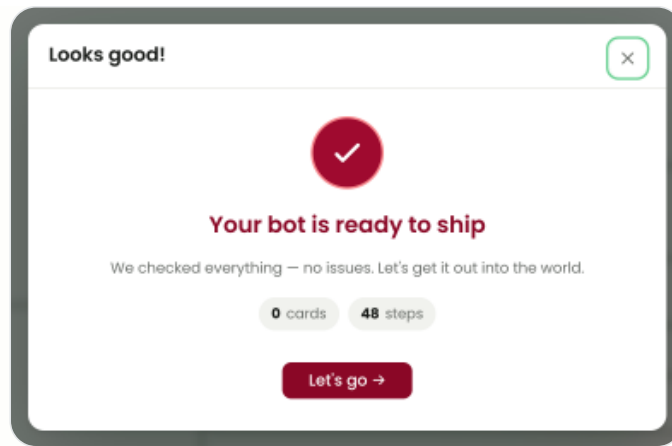
✔ A Human Approval step does not approve the project release.

✔ A worker may need to be published before it can be selected by a flow.

✔ An environment must contain the required resources and connections before deployment.

2. Validate the project

The readiness check confirms that Designer found no blocking configuration issue.



A successful readiness check confirms that Designer found no blocking project issues.

✓ The readiness check runs as the project moves toward publication or deployment.

✓ A successful result says that no issues were found.

✓ The summary may include the number of cards and process steps.

✓ Let's go continues to the next stage.

✓ The figures shown belong only to the ACME demonstration.

✓ The dialog uses the word "bot"; this guide refers to the project or solution.

- 1 Save the current draft.
- 2 Complete representative Run Demo tests.
- 3 Resolve the visible issue count.
- 4 Start the deployment or publication journey.
- 5 Review the readiness result.
- 6 Return to the Editor if an issue remains.
- 7 Continue only when technical validation and business review have both succeeded.

ⓘ **Validation does not test every business outcome**

A project may pass the readiness check while still containing an incorrect business rule, misleading customer message or unsuitable approval path.

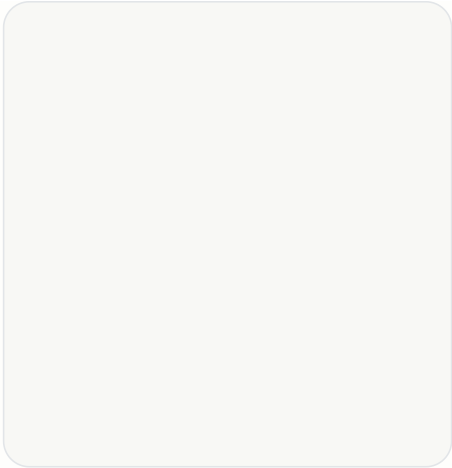
Testing and troubleshooting

Build the test coverage that the readiness check cannot provide.

[Open guide →](#)

3. Save and review versions

Record the exact state that passed testing before publishing or making further changes.



Record a project version before publication or significant changes.

Version history

Review the project versions currently available.

Save as version

Record the current state as a meaningful version.

Auto-layout

Rearrange the visual canvas. This changes presentation, not the purpose of versioning.

Import flow

Import supported flow content.

Export flow

Export the flow through the supported Designer format.

Export to GitHub

Send supported project content to a connected GitHub destination.

- 1 Complete the intended design changes.
- 2 Save the draft.
- 3 Run the priority test scenarios.
- 4 Complete the readiness check.
- 5 Open the project actions menu.
- 6 Select Save as version.
- 7 Add a meaningful version label or description where requested.
- 8 Review Version history to confirm that the state was recorded.
- 9 Continue editing in the draft when further changes are required.

Version before publishing

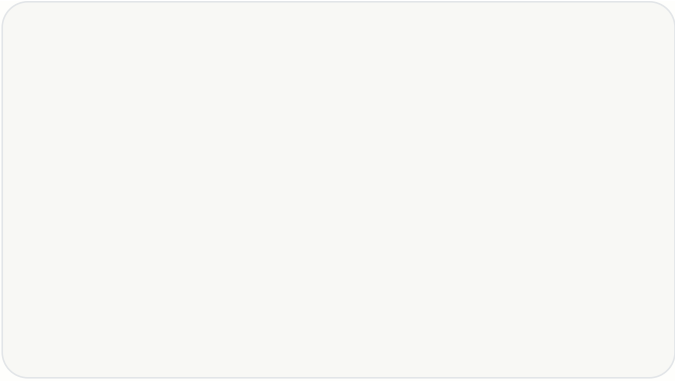
Record the exact project state that has passed testing and business review. Avoid publishing from an unrecorded draft after unrelated changes have been added.

Only the shown actions are documented

The current interface does not show comparison, rollback, restoration or branching controls, and it does not specify import or export file formats or GitHub repository behaviour.

4. Publish an Agentic Worker

Publication makes a completed worker selectable by flows and, where authorised, available in the Store.



Publish an Agentic Worker locally for use in Designer or additionally to the Store when authorised.

Local only

Saves the worker to this Designer so it appears in the Agentic Worker flow step. Use this when the worker is intended for solutions in the current Designer context.

Local and publish to Store

Saves the worker locally and also publishes it to the Store. The dialog shows that Store sign-in is required in this state.

- 1 Open the Agentic Worker in Composer.
- 2 Complete direct worker testing.
- 3 Confirm the model, tools, guardrails, memory and limits.
- 4 Save the accepted project state as a version.
- 5 Select Publish.
- 6 Review the version displayed in the dialog.
- 7 Select Local only when the worker is required inside the current Designer.
- 8 Select the Store option only when signed in and Store distribution is intended.
- 9 Select Publish.
- 10 Confirm that the worker is available to the intended Flow project.

ⓘ Local publication is not deployment

Publishing locally makes the worker reusable in Designer. It does not connect the worker to a customer-facing channel or activate a deployment environment.

ⓘ Do not assume the Store workflow

The dialog does not show listing metadata, Store visibility, pricing, commercial terms, review or moderation, publication permissions or version-update behaviour. Confirm those separately before promising them to a customer.

Agentic workers

Review the worker configuration that publication packages.

[Open guide](#) →

5. Understand runtime human approvals

Approvals pause sensitive flow activity until an authorised person decides what happens next.

The Approvals inbox shows work that is waiting for a human decision.

✓ The Approvals page is the operational inbox for work paused while waiting for approval.

✓ A request can be created when a flow reaches a configured Human Approval step.

✓ The screenshot shows an empty inbox.

✓ An empty inbox means no request is currently visible in the shown workspace state.

✓ It does not prove that approval policies are absent.

✓ It does not prove that no flow contains a Human Approval step.

```
Flow reaches Human Approval
      ↓
Flow references an Approval Policy
      ↓
Request appears in Approvals
      ↓
Authorised person responds
      ↓
Flow continues
```

ⓘ When an expected approval is not in the inbox

Confirm that the correct workspace is active, that the flow reached the Human Approval step, that the flow references the intended Policy ID, that the request has not already been answered or exhausted, and that the current user satisfies the policy's approver rules.

6. Configure an approval policy

A policy defines its identity, its purpose and whether the requester may approve their own request.

An approval policy defines its identity and whether the requester may approve their own request.

✓ About this policy

✓ Levels

✓ If nobody responds

✓ Channels

Name

The human-readable name operators see in the list and on paused work.

Policy ID

The identifier a flow uses to reference the policy. The interface states it cannot be changed after the policy is created.

Description

Explains the policy's business purpose and when it should be used.

Requester cannot self-approve

When enabled, the person who requested the action may not approve it. When disabled, the policy itself does not prohibit self-approval, although the requester must still satisfy any other approver rules.

Summary

The right-hand panel summarises the number of levels, the requester self-approval state, what happens when all levels are exhausted and the configured channels.

Automatic saving

Changes save automatically in the interface shown.

- 1 Open Approval policies.
- 2 Create a policy or open the policy to configure.
- 3 Enter a clear operator-facing name.
- 4 Choose the Policy ID carefully.
- 5 Add a description explaining the protected action.
- 6 Decide whether the requester may approve their own request.
- 7 Review the Summary panel.
- 8 Continue to Levels.

 Choose the Policy ID before the flow uses it

The interface states that the identifier cannot be changed after creation. If an incorrect ID is created, a new policy and updated flow reference may be required.

 Use separation of duties for sensitive actions

For financial, compliance, security or high-impact actions, consider preventing the person who requested the action from approving it. This is a judgement per workflow, not a universal requirement.

7. Configure approval levels

Levels define who may respond, how many approvals are needed and when the request escalates.

Approval levels define who may respond, how many approvals are needed and when to escalate.

☒ Each level is asked in sequence.

☒ If a level receives the required approvals, the request can continue.

☒ If a level reaches its time limit without an answer, the request moves to the next level.

☒ What happens after the final level is controlled by If nobody responds.

Who may approve

The current interface supports choices such as administrators only or any member of the workspace. Treat these as examples from the current interface.

Approvals needed

The number of approvals required at that level.

Named approvers

Optionally limit the level to specified people. Naming people narrows the level to exactly those approvers.

Escalate after

The number of minutes the level waits before moving to the next level. Left blank, the level waits indefinitely instead of escalating automatically.

Add level

Adds another approval level for escalation or additional review.

Ordering

Use Move up and Move down where available to control the level sequence.

Zero approvals creates an open gate

The interface states that a level requiring zero approvals is an open gate. Use zero only when that behaviour is explicitly intended and approved.

- 1 Open the Levels tab.
- 2 Choose who may approve Level 1.
- 3 Set the number of approvals required.
- 4 Add named approvers only when the level must be limited to specific people.
- 5 Enter an escalation time where automatic movement to the next level is required.
- 6 Leave the escalation field blank only when indefinite waiting is intentional.
- 7 Select Add level when another approval stage is required.
- 8 Order the levels from first response group to final escalation group.
- 9 Review the Summary panel.

① **Start with the simplest policy that meets the control**

Use one level where one level is enough. Add escalation levels only when the business process requires them.

① **Two notes on the shown state**

The lower part of the screen includes an incomplete “Only when” control whose full configuration is not shown, so its behaviour is not documented here. The note that the member directory is unavailable and names must be typed is the state of this demonstration, not a permanent platform limitation.

8. Decide what happens when nobody responds

An exhausted request is either refused or treated as timed out. Neither outcome approves it.

Choose whether an exhausted approval request is refused or treated as timed out.

Deny

The request is turned down and the flow continues along its refused path. The interface states that every flow has a refused path.

Time out

The request expires and continues along the flow's timed out path. The interface states that only some flows have a timed-out path.

① **A missed deadline is not consent**

Neither option approves the request.

- 1 Open If nobody responds.
- 2 Review the process risk.
- 3 Choose Deny when the safe fallback is to refuse the action.
- 4 Choose Time out only when the flow has a defined timed-out path.
- 5 Confirm that the receiving flow handles the selected outcome.
- 6 Review the Summary panel.

① **Confirm the flow path before choosing Time out**

Do not select Time out unless the flow has a controlled destination for the timed-out result.

① **Do not auto-approve by inaction**

An unanswered approval must not be interpreted as permission to continue a sensitive action.

9. Review approval channels

Channel preferences are recorded with the policy, but approvals are answered from the inbox today.

Channel preferences are stored with the policy, but the current interface says approvals are answered from the inbox.

✓ The Channels tab records a preferred delivery order.

✓ No channels are configured in the state shown.

✓ A channel name can be entered and added.

✓ The interface states that preferences are saved but not yet acted on.

✓ Approvals are currently answered from the Approvals inbox.

ⓘ **Use the Approvals inbox today**

Do not tell users that adding a channel name will send an operational notification. The current interface explicitly says that these preferences are not yet acted on, so no notification behaviour should be promised.

ⓘ **Recording a preference is future readiness**

Recording preferences can prepare a policy for future supported notification behaviour, but it does not replace the current inbox workflow.

10. Configure a deployment environment

An environment connects the places customers reach you to the workers and capabilities that answer them.

A deployment environment connects customer channels to the workers and capabilities that answer them.

Environment

The screenshot shows an example environment name. Treat it as demonstration data, not as a default environment.

Add a channel

Adds the place through which users or systems reach the solution.

Add a worker

Adds the worker intended to respond through the environment.

Additional resources

The top Add controls show resources such as Provider, Agentic Worker and Capability.

Wiring assistant

A control offered by the environment. Its internal workflow is not shown, so it is not documented here.

Deploy environment

Starts the environment deployment process after the required resources and connections have been prepared.

Channel



Worker



Provider and approved capabilities



Deployed environment

- 1 Open Deploy.
- 2 Open the intended non-production environment.
- 3 Review the environment name.
- 4 Select Add a channel.
- 5 Add the worker intended to handle that channel.
- 6 Add any required provider or capability resources.
- 7 Connect the resources according to the environment design.
- 8 Review the wiring.
- 9 Use the Wiring assistant where appropriate.
- 10 Select Deploy environment.
- 11 Complete the deployment prompts presented by the product.
- 12 Perform a controlled test after deployment.

ⓘ An empty environment cannot serve requests

The environment must contain the required channel, worker and supporting resources before it can provide a complete solution.

ⓘ Deploy to a safe environment first

Validate new workers, capabilities and channels in a non-production environment before making them available to real users. The channel selector, resource configuration, wiring result, deployment prompts and deployed status are not shown here, so confirm them in the product rather than assuming their fields.

11. Recommended deployment sequence

A repeatable order that keeps technical validation, publication and business authorisation distinct.

- 1 Complete worker and flow design.
- 2 Run direct worker tests.
- 3 Run end-to-end Flow tests.
- 4 Resolve the project issue count.
- 5 Complete the readiness check.
- 6 Save the accepted project state as a version.
- 7 Publish Agentic Workers locally where a Flow must select them.
- 8 Confirm approval policies and Policy IDs.
- 9 Test Human Approval paths using safe data.
- 10 Open the target non-production environment.
- 11 Add channels, workers and supporting resources.

- 12 Review environment wiring.
- 13 Deploy the environment.
- 14 Complete a post-deployment test.
- 15 Obtain the required business approval before production use.
- 16 Repeat the controlled process for the production environment where available.

 Change one layer at a time

When possible, avoid changing the worker, flow, approval policy and deployment environment simultaneously. Smaller releases are easier to test and diagnose.

12. Update a published or deployed solution

Repeat the controlled cycle rather than editing a live solution informally.

```
Edit draft
↓
Test changed behaviour
↓
Run nearby regression tests
↓
Complete readiness check
↓
Save as a new version
↓
Republish affected worker where required
↓
Review environment wiring
↓
Redeploy
↓
Complete a post-deployment test
```

- 1 Make the change in the editable draft.
- 2 Test the changed scenario.
- 3 Retest related paths.
- 4 Run the readiness check.
- 5 Record a new version.
- 6 Republish any Agentic Worker whose published configuration changed.
- 7 Review approval policies when the change affects a sensitive action.
- 8 Review the target environment.
- 9 Redeploy using the supported deployment process.
- 10 Confirm the solution still behaves correctly.

 Only documented controls

Rollback, promotion, environment copying and version comparison are not shown in the current interface, so do not plan a release around them.

Review before going live

Confirm this list before a solution is made available to real users.

 The correct workspace is active.

 Priority worker tests pass.

Important Flow branches pass.	Missing and invalid inputs are controlled.
The project issue count is resolved.	The readiness check succeeds.
The accepted state is saved as a version.	Required Agentic Workers are published locally.
Store publication is used only when intentionally required.	Approval policies use the correct immutable Policy IDs.
Requester self-approval matches the business control.	Approval levels contain the correct roles and approvers.
No level accidentally requires zero approvals.	Escalation timing is intentional.
The no-response outcome matches a valid flow path.	Operators know to use the Approvals inbox.
The deployment environment contains the required channel and worker.	Required providers and capabilities are present.
The environment wiring has been reviewed.	A non-production deployment was tested.
Production authorisation has been obtained separately.	No real customer data was used in unsafe testing.
Correct a project issue Diagnose failures and resolve the visible issue count. Open Testing and troubleshooting →	Review Flow approval steps Check where the process pauses for a human decision. Open Flows →
Update a worker Change worker configuration before republishing. Open Agentic workers →	Configure tenant-wide providers and tools Set up the providers, extensions and tools an environment relies on. Open AI and tools →

Troubleshooting at a glance

Frequent release problems and the practical action that resolves them.

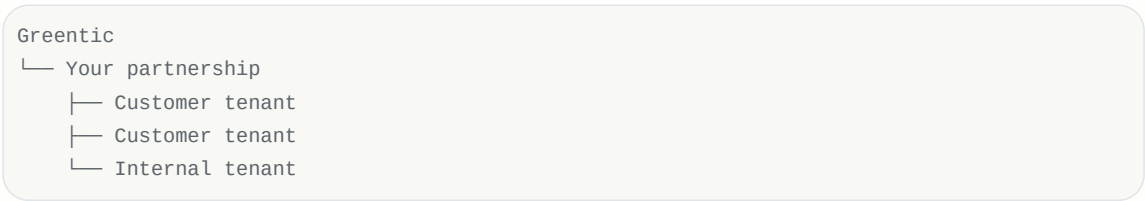
PROBLEM	LIKELY CAUSE	ACTION
The readiness check does not pass	A blocking project setting or connection remains incomplete	Return to the Editor, resolve the issue and run the check again
The readiness check passes but the process is wrong	Technical validation does not verify every business rule	Expand business testing and correct the process
The accepted project state cannot be identified	The draft was not recorded as a version	Save the accepted state using Save as version
A worker does not appear in an Agentic Worker Flow step	It has not been published locally or the wrong workspace is active	Publish it locally and confirm the workspace
Store publication is unavailable	The user is not signed in to the Store	Sign in only when Store publication is genuinely required
Publishing locally did not create a live customer experience	Publication and deployment are separate	Configure and deploy an environment
The Approvals inbox is empty	No request is pending, the Flow did not reach approval or the wrong workspace is active	Check the Flow path, Policy ID and workspace
The requester can approve their own action	Requester cannot self-approve is disabled	Enable the setting when separation of duties is required
The wrong people may approve	The role or named-approver settings are too broad	Review the policy level and narrow the approvers
An approval level requires no decision	Approvals needed is set to zero	Set the intended positive approval count unless an open gate is deliberate
A request never escalates	Escalate after is blank	Add an approved time limit or accept indefinite waiting
A request is refused after all levels	If nobody responds is set to Deny	Confirm that the Flow handles the refused path
A timed-out request has nowhere to go	Time out was selected but the Flow lacks a timed-out path	Add a controlled path or select Deny
Approval notifications do not arrive in another channel	Channel preferences are not yet acted on in the shown interface	Use the Approvals inbox
The deployment environment is empty	No channel or worker has been added	Add and connect the required resources
Deploy environment cannot produce a complete solution	A worker, provider, capability or connection is missing	Review all environment resources and wiring
A deployment change breaks another route	Several layers changed at the same time	Isolate the change and retest related paths
A sensitive change went live without business approval	Technical deployment was confused with organisational approval	Reinstate the required change-control process

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Partnerships and tenants

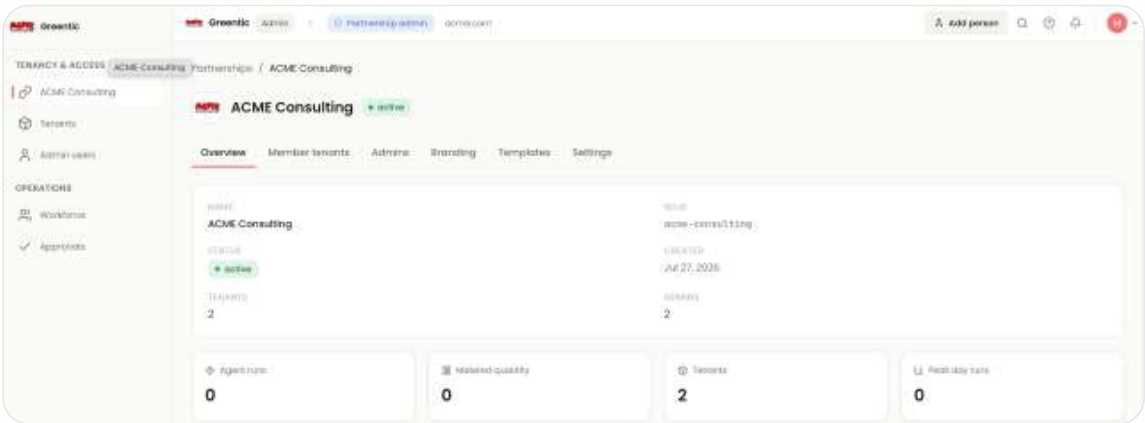
A partnership represents your organisation in Greentic. It contains shared settings, administrators, branding, templates and member tenants.

A tenant represents an individual customer, business unit or isolated environment. Each tenant has its own identity, access controls, environments, AI capabilities, guardrails and usage.



 **Scope of a partner administrator**

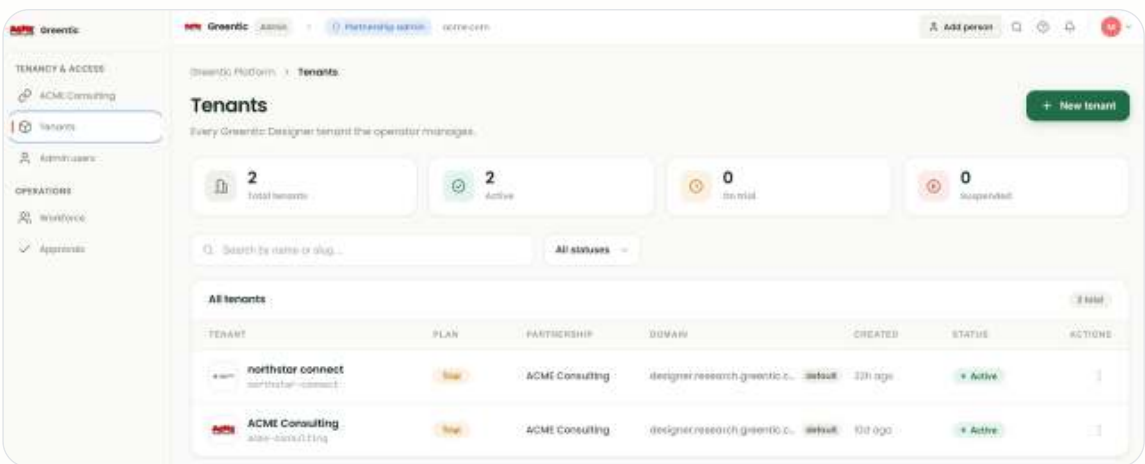
Partner administrators manage their own partnership and its member tenants. They do not administer the entire Greentic platform.



Your partnership is the parent organisation from which you manage member tenants, administrators, branding and shared resources.

Manage customer environments

The Tenants page lists every tenant managed by your partnership. From here, you can create tenants, review their plans and status, search by name or slug and open their configuration.

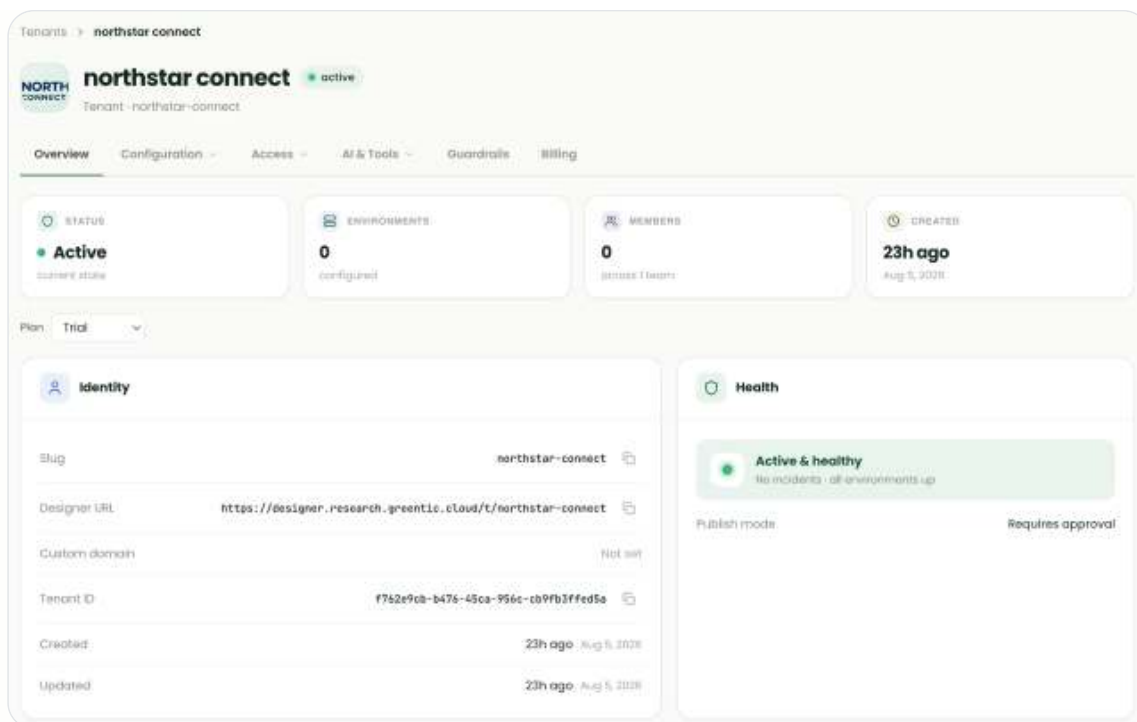


Each tenant is an isolated customer or internal environment managed by the partnership.

Create and manage tenants →

Configure each tenant independently

Each tenant has its own overview and configuration areas. Partner administrators can manage deployment environments, branding, features, access, AI providers, guardrails and billing independently for each tenant.



The tenant overview provides access to identity, deployment, access, AI, governance and billing settings.

Overview

Review status, plan, Designer URL and health.

Configuration

Manage environments, branding and features.

Access

Configure sign-in, SSO, teams, roles, domains, provisioning and users.

AI & Tools

Connect providers, OAuth apps, extensions, MCP servers and external tools.

Guardrails

Create and enforce policies for tenant activity.

Billing

Review credits, usage, spend and wallet configuration.

Recommended setup journey

- 1 **Review your partnership** →
Confirm the partnership identity, member tenants and administrators.
- 2 **Create the customer tenant** →
Enter its name and slug, choose a plan, upload a logo and select a primary colour.
- 3 **Review the tenant overview** →
Confirm the tenant status, Designer URL and health.
- 4 **Configure an environment** →
Choose Greentlc-hosted deployment or a supported customer cloud.
- 5 **Configure access** →
Enable password login or configure SSO, users, teams and roles.
- 6 **Connect AI and tools** →

Add the required AI providers, APIs, MCP servers and extensions.

- 7

Configure guardrails

Apply governance and policy controls before production use.

→
- 8

Add credits and review usage

Fund the tenant and monitor consumption.

→
- 9

Open Greentic Designer

Use the tenant's Designer URL to start creating solutions.

→

Quick links

- Create a tenant

→
- Configure branding

→
- Add an environment

→
- Configure access

→
- Connect AI and tools

→
- Review billing

→

Scope: your partnership and its member tenants

What a partnership is

A partnership represents your organisation in Greentic. It does not provide access to the entire Greentic platform. Partnership administrators manage only their own partnership and the tenants connected to it.

What you can manage

The partnership workspace is organised into six tabs.

Overview

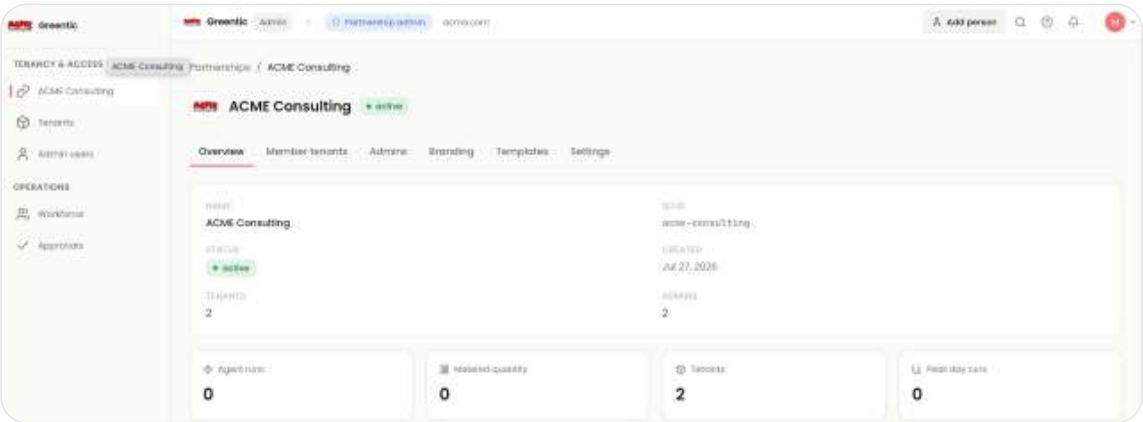
Member tenants

Admins

Branding

Templates

Settings



The partnership workspace brings identity, tenants, administrators, branding, templates, settings and aggregate usage together.

Overview

Review partnership identity, activity, usage and billing roll-up.

Member tenants

View customer tenants, create new tenants and manage partnership membership.

Admins

Manage the people who can administer the partnership.

Branding

Set the default identity inherited by member tenants.

Templates

Offer reusable solutions to every tenant in the partnership.

Settings

Control partnership-wide branding governance and copy branding from a member tenant.

Partnership guides

Each guide covers one area of the partnership workspace.

Understand your partnership

Review partnership identity, status, member tenants, administrators and aggregate usage.

Manage member tenants

View, create and organise the tenants connected to your partnership.

Manage partnership administrators

Control who can administer the partnership and its shared resources.

Coming next

Configure shared branding

Set the default logo, colours, title, theme and typography inherited by member tenants.



Manage partnership templates

Offer reusable store templates or signed custom bundles to member tenants.

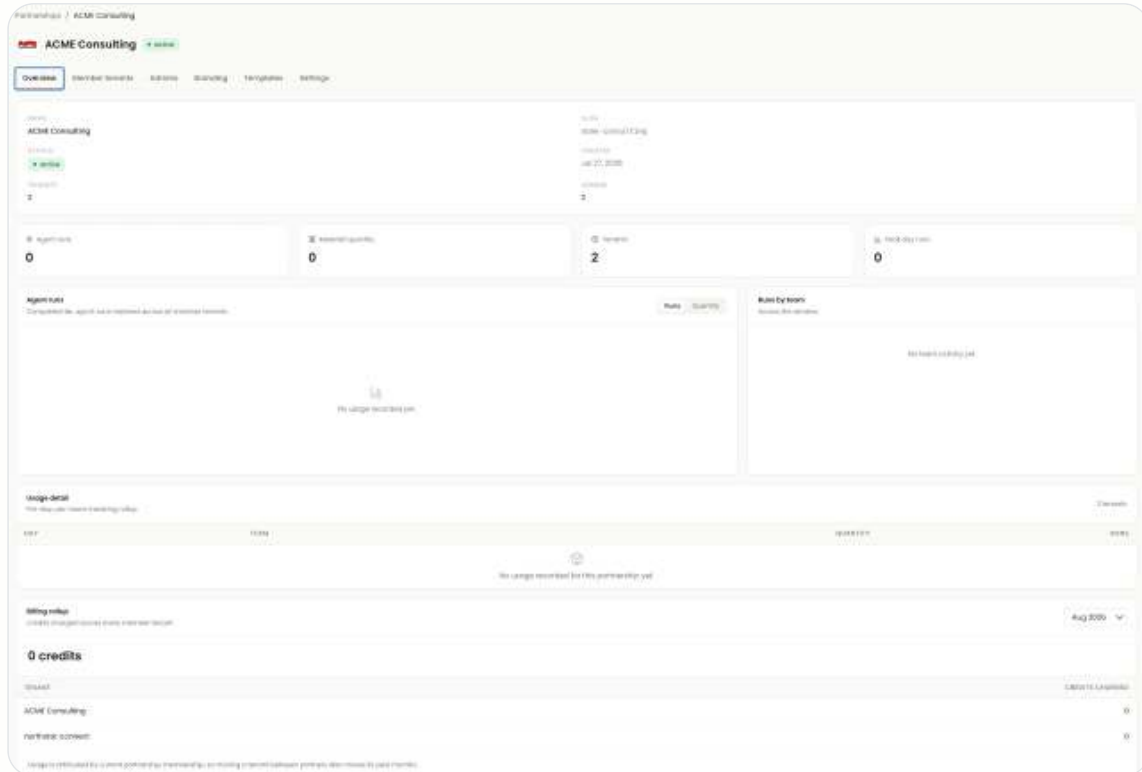


Configure partnership settings

Lock member-tenant branding or seed partnership branding from an existing tenant.

Review partnership identity and usage

The Overview tab summarises who the partnership is and how much its member tenants are using.



Partnership Overview: identity, activity, usage detail and billing roll-up.

Partnership name

The name of your organisation in Greentec.

Slug

The stable identifier used for the partnership.

Active status

Whether the partnership is currently active.

Creation date

When the partnership was created.

Member tenants

The number of tenants connected to the partnership.

Administrators

The number of partnership administrators.

Agent runs

Completed digital-worker or agent activity metered across member tenants.

Metered quantity

The usage quantity recorded across the partnership.

Tenants

The current number of member tenants.

Peak day runs

The highest recorded run volume during the selected reporting period.

Agent runs chart

Shows aggregate partnership activity over time.

Runs by team

Shows activity grouped by team where available.

Usage detail

Provides daily and per-team usage information.

Billing roll-up

Shows credits charged across current member tenants.

ⓘ Aggregated view

Usage and billing shown here are aggregated across the partnership's current member tenants. Tenant-level details remain available inside each tenant's own Billing section.

ⓘ Attribution follows membership

Historical usage is attributed according to current partnership membership. Moving a tenant between partnerships may also move how prior usage is presented.

Manage member tenants

The Member tenants tab lists the customer and internal tenants connected to the partnership.

The screenshot shows the 'Tenants' management page in the Greento Platform. The left sidebar contains navigation links for 'TENANCY & ACCESS' (ACME Consulting, Tenants), 'OPERATIONS' (Admin users, Resource, Approvals), and 'Add person'. The main content area is titled 'Tenants' and includes a '+ New tenant' button. It displays summary cards for 'Total tenants' (2), 'Active' (2), 'On trial' (0), and 'Suspended' (0). Below these is a search bar and a table of tenants. The table has columns for Tenant, Plan, Partnership, Domain, Created, Status, and Actions. Two tenants are listed: 'northstar connect' and 'ACME Consulting', both on 'Free' plans, associated with 'ACME Consulting' partnership, and in 'Active' status.

Tenant	Plan	Partnership	Domain	Created	Status	Actions
northstar connect	Free	ACME Consulting	designer.research.greento.c...	32h ago	Active	
ACME Consulting	Free	ACME Consulting	designer.research.greento.c...	1d ago	Active	

Member tenants connected to the partnership.

Tenant name

The customer-facing name of the tenant.

Tenant slug

The stable identifier used in tenant URLs.

Status

The current state of the tenant.

Actions

The operations available for that tenant row.

View a tenant

Select or open the tenant to manage its configuration, access, AI tools, guardrails and billing.

Create a tenant

Use Add tenant to create a new tenant directly inside the partnership.

Remove a tenant

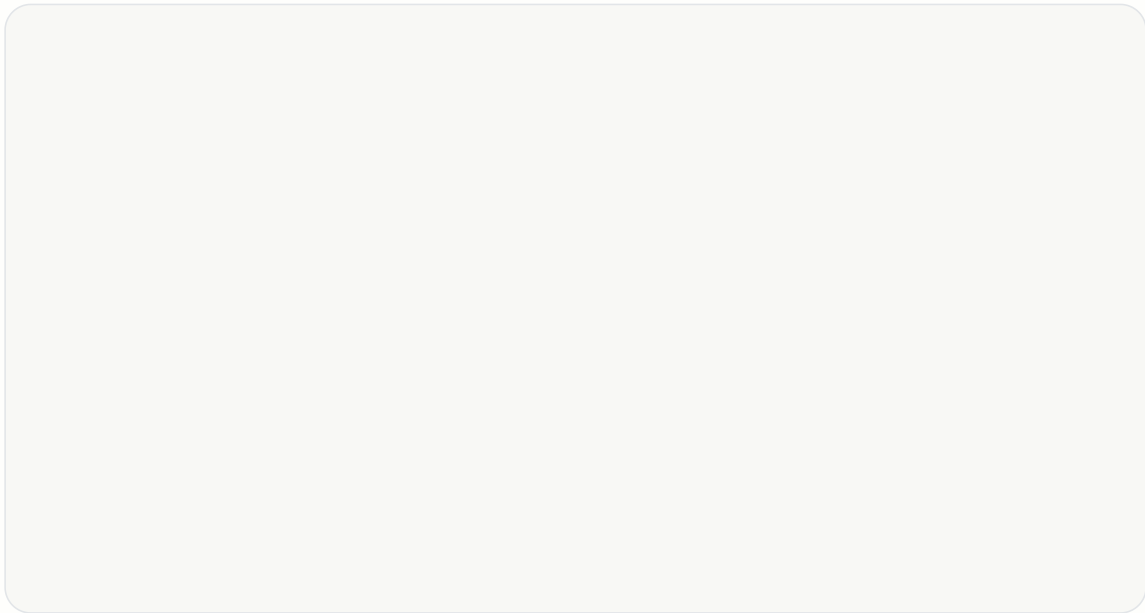
Disconnect an existing tenant from the partnership where the action is available.

ⓘ Remove is a membership action

Treat Remove as a partnership-membership action. Do not assume it deletes the tenant unless the product confirmation explicitly states that.

Create a new member tenant

Add a customer environment directly from the partnership.



The New tenant dialog opened from Member tenants.

- 1 Open the partnership.
- 2 Select Member tenants.
- 3 Select Add tenant.
- 4 Enter the tenant name.
- 5 Review or edit the generated slug.
- 6 Choose the tenant's primary colour.
- 7 Upload an optional logo.
- 8 Select the initial plan.
- 9 Select Create tenant.
- 10 Copy and securely store the generated starter API key when it appears.

Name

The customer-facing tenant name.

Slug

The stable identifier used in tenant URLs and internal references.

Primary colour

The initial tenant brand colour.

Logo

The initial customer or product identity.

Plan

The commercial or trial plan assigned at creation.

ⓘ Protect the starter API key

A starter API key is generated during tenant creation and displayed once. Store it securely. Never place it in documentation, source control or public screenshots.

[Continue to Create and manage tenants →](#)

Share reusable solutions with member tenants

The Templates tab offers reusable starting points across the partnership.

Default templates, catalog templates and custom template upload.

Default templates

Templates offered or automatically provisioned to every tenant in the partnership.

Add from catalog

Select a published store template and make it available as a partnership default.

Upload custom template

Upload a signed .gtxtpl bundle directly to the partnership.

Delivery

Controls how the template is offered or delivered to member tenants. Choose from the options available in the live dropdown.

Template file

Accepts a signed .gtxtpl template bundle.

- 1 Open the partnership.
- 2 Select Templates.
- 3 Add a published template from the catalog, or upload a signed custom template.
- 4 For a custom template, select the delivery behaviour.
- 5 Upload the .gtxtpl file.
- 6 Select Upload.
- 7 Confirm that the template appears under Default templates.

Reusable starting points

Partnership templates provide reusable starting points across member tenants. They do not automatically replace tenant-specific solutions unless the chosen delivery option explicitly does so.

Learn how reusable solutions are created in the **Designer Guides**.

Control partnership-wide branding behaviour

Settings governs whether member tenants may change their own branding.

Lock branding for member tenants and copy branding from an existing tenant.

Lock branding for member tenants

Prevents member tenants from overriding fields on their own Branding tab. This does not change the partnership's own branding.

Copy from a member tenant

Seeds the partnership branding from the appearance currently rendered by a selected member tenant, replacing every field configured on the partnership Branding tab.

When to lock branding

The partner must enforce one consistent white-labelled identity.

Customer tenants should inherit the partnership brand.

Local tenant branding changes need to be prevented.

ⓘ Locking restricts tenant autonomy

Enabling this setting restricts member-tenant branding autonomy. Confirm the intended commercial and customer experience before switching it on.

- 1 Open Partnership Settings.
- 2 Select a member tenant.
- 3 Select Copy.
- 4 Review the resulting values on the Partnership Branding tab.
- 5 Save or adjust the branding as required.

ⓘ Copying replaces existing branding

Copying from a member tenant replaces the branding fields currently configured for the partnership. Review the selected tenant carefully before confirming the action.

Understand **branding inheritance**.

Set the default identity for member tenants

Partnership branding becomes the default identity for member tenants that do not define their own overrides.

Partnership branding settings inherited by member tenants.

[Open the Branding guide →](#)

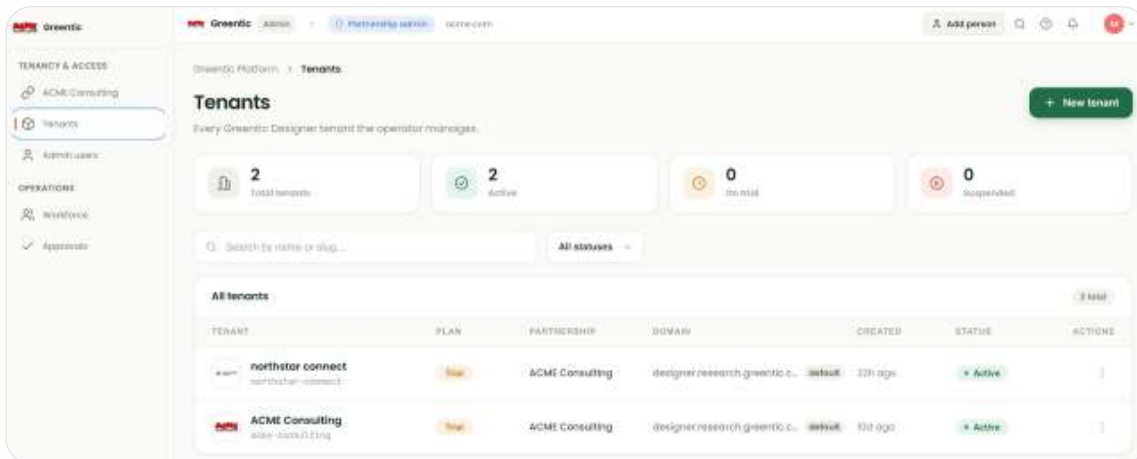
Recommended partnership setup order

- 1 Review the partnership Overview.
- 2 Confirm the partnership status, slug and administrators.
- 3 Configure partnership branding.
- 4 Decide whether member tenants may override branding.
- 5 Create or connect the first customer tenant.
- 6 Add partnership administrators.
- 7 Add reusable default templates.
- 8 Review aggregate activity and billing regularly.

Quick reference

TASK	LOCATION
Review partnership usage	Overview
Create a customer tenant	Member tenants → Add tenant
Manage partnership administrators	Admins
Set default branding	Branding
Share reusable solutions	Templates
Lock tenant branding	Settings
Copy branding from a tenant	Settings

[← Back to Admin Guides](#)



The Tenants page lists every tenant managed by your partnership.

Guides in this section

Each guide below covers one task. Detailed step-by-step content is being published progressively.

Understand tenants

What a tenant is and what it isolates.

COMING SOON

Create a tenant

Use the New tenant form to add a customer environment.

COMING SOON

Choose a tenant name and slug

Pick a clear name and a stable slug used in URLs.

COMING SOON

Choose a plan

Select the plan applied when the tenant is created.

COMING SOON

Upload a logo and primary colour

Give the tenant its own identity at creation time.

COMING SOON

Save the starter API key

Store the key generated during tenant creation.

COMING SOON

Review tenant status and health

Check status, Designer URL and health indicators.

COMING SOON

Open the tenant Designer

Use the tenant Designer URL to start building.

COMING SOON

Suspend or reactivate a tenant

Change tenant status when access should pause or resume.

COMING SOON

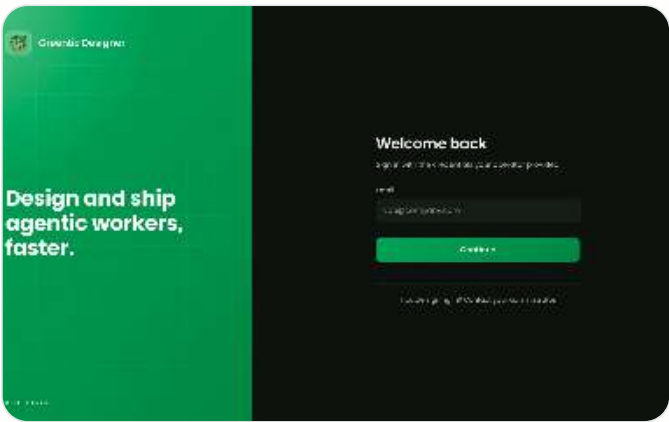
Store the starter API key

A starter API key is generated during tenant creation and shown once. Store it securely when it appears.

← Back to Admin Guides

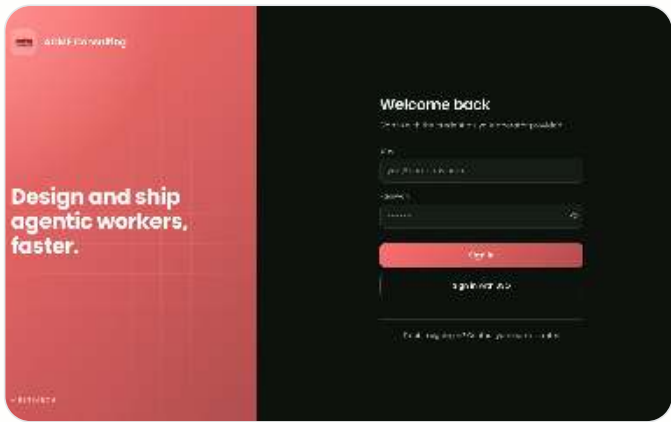
One platform, multiple identities

Greentec Designer can use the default Greentec identity, a partner identity or an individual customer identity. Each organisation can have its own app title, logo, colours and sign-in experience.



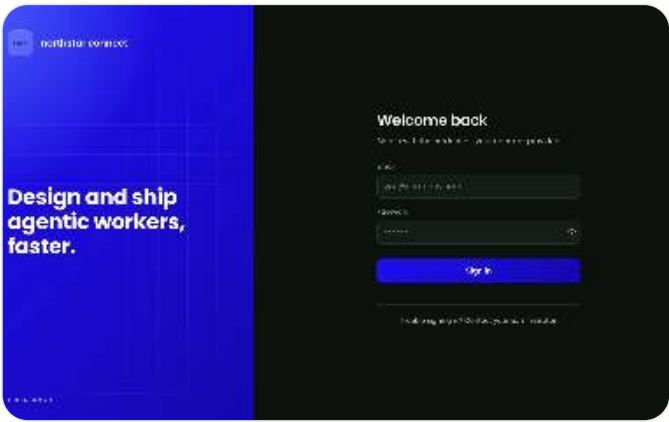
Greentec platform

The default identity used when no partnership or tenant override exists.



Partner identity

A partnership can provide its own branded Designer experience to member tenants.

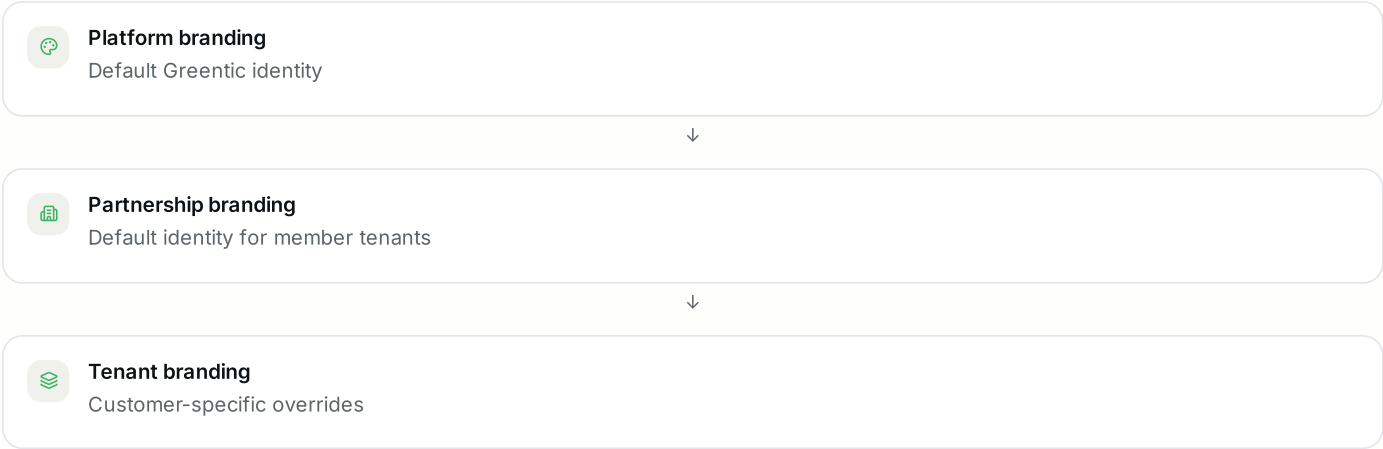


Tenant identity

An individual tenant can override the partnership branding with its own identity.

How branding inheritance works

Branding is resolved from the most specific level available. A tenant can override selected fields while continuing to inherit the remaining values from its partnership or the Greentec platform.



- 🕒 Greentic resolves branding field by field. For example, a tenant can use its own logo and primary colour while continuing to inherit the partnership font and interface skin.

Example

ACME Consulting partnership

- └─ ACME Consulting tenant – inherits ACME branding
- └─ Northstar Connect – overrides the logo, title and primary colour

Northstar Connect and ACME Consulting are both member tenants of the ACME Consulting partnership. The ACME Consulting tenant renders the partnership identity, while Northstar Connect replaces selected fields with its own identity — as shown in the sign-in comparison above.

Branding guides



How branding inheritance works

Understand how platform, partnership and tenant branding are resolved.

🕒 4 min read



Brand a partnership

Create the default visual identity inherited by member tenants.

🕒 5 min read



Brand an individual tenant

Give one customer environment its own identity without changing the partnership default.

🕒 4 min read



Logos, colours and typography

Understand the app title, logo, primary colour, accent colour, logo background, skin and font settings.

🕒 5 min read



Inherit, replace or clear

Understand how to override a value, restore inheritance or explicitly display no logo.

🕒 3 min read



Preview your branded experience

Review how your branding appears across the sign-in experience and Designer interface.

🕒 3 min read



Branding and custom domains

Understand the difference between the visual identity and the URL through which users access it.

🕒 3 min read



Branding checklist

Review the logo, contrast, inheritance and responsive experience before launch.

🕒 3 min read



Troubleshooting

Resolve common logo, colour, inheritance and sign-in branding issues.

🕒 4 min read

Brand a partnership

Partnership branding becomes the default identity for every member tenant that does not define its own override.

CME Consulting active

Member tenants Admins **Branding** Templates Settings Domain

Branding

Member tenant with no branding of its own renders what you set here. A field left inherited keeps following the platform default.

Y

3

ntic Admin

 Replace

Remove

from platform

inherit Clear — show no logo

5

color

#fb6f6f

inherit

Accent color

#f9aeb6

Reset to inherit

Logo background

#fb6f6f

Reset to inherit

GRAPHY

Font family

from platform

poppins

Inherited from platform

WHAT MEMBER TENANTS SEE BY DEFAULT



Greentic Admin

Sample card

This is how a worker's Designer chrome looks with the current branding.

Primary action

- 1 Open Partnerships.
- 2 Select the partnership.
- 3 Open the Branding tab.
- 4 Enter the app title.
- 5 Upload the partnership logo.
- 6 Configure the primary, accent and logo-background colours.
- 7 Select the interface skin and font family.
- 8 Review the preview.
- 9 Select Save.

 Any field left inherited continues to follow the Greentic platform default. Member tenants may later override individual values.

[Read the partnership branding guide →](#)

What each setting controls

App title

The name displayed beside the logo and throughout the branded Designer experience.

Logo

The organisation or product identity displayed on the sign-in page and in supported Designer areas.

Primary colour

The main brand colour used for prominent branded surfaces, primary actions and key interface highlights.

Accent colour

A supporting colour used for lighter highlights and complementary interface states.

Logo background

Skin

The colour placed behind a logo when additional contrast is required.

Controls whether supported interface areas use a light or dark visual treatment.

Font family

Controls the typeface used throughout supported branded areas.

Inherit, replace or clear a value

Branding settings can be inherited from a parent, replaced at the current level or explicitly cleared.

ACTION	RESULT
Replace	Configure and use a new value at the current level.
Reset to inherit	Remove the local override and use the value from the parent partnership or platform.
Show no logo	Explicitly display no logo, even when the parent has one.

Important

Reset to inherit does not leave the value blank. It restores the value configured at the parent level.

Example

ACME Consulting has a partnership logo. For Northstar Connect:

- Replace displays the Northstar logo.
- Reset to inherit displays the ACME logo.
- Show no logo displays no logo.

Preview before you save

Check how the app title, logo, colours, typography and actions work together before applying the branding to users.

✓ The logo is clear and not cropped.

✓ The app title remains readable at smaller screen sizes.

✓ Text has sufficient contrast against the primary colour.

✓ Primary actions remain easy to identify.

✓ The selected skin works with the logo.

✓ Inherited values come from the expected parent.

✓ Tenant overrides affect only the intended tenant.

✓ The sign-in experience works on desktop and mobile.



Compare the full sign-in examples at the top of this page.

Branding controls appearance. Domains control access.



Branding controls

- Logo



Custom domains control

- The URL users visit

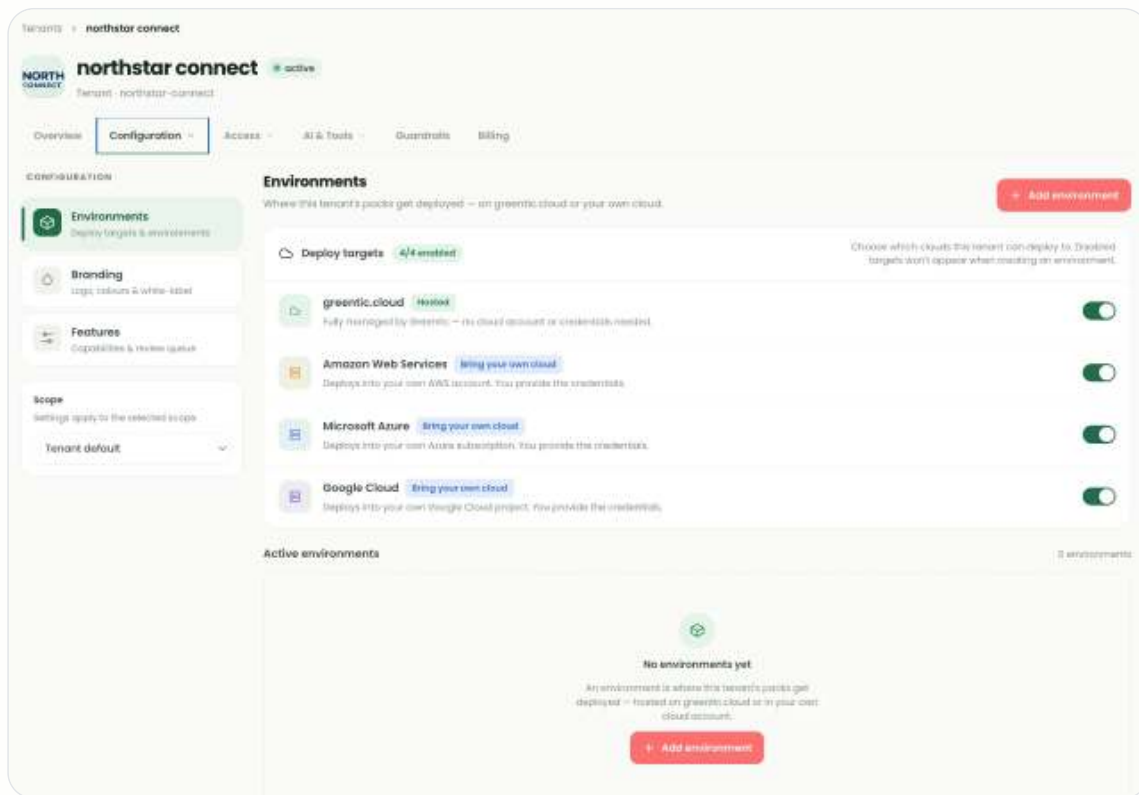
- App title
- Colours
- Skin
- Typography

- DNS configuration
- Routing
- Domain verification

Example — Branding: Northstar Connect logo and colours. **Domain:** designer.northstarconnect.com

[Explore custom domain guides →](#)

[← Back to Admin Guides](#)



Deploy targets control which clouds a tenant can deploy to; disabled targets do not appear when creating an environment.

Guides in this section

Each guide below covers one task. Detailed step-by-step content is being published progressively.

Understand deployment targets and environments

How targets and environments relate to each other.
COMING SOON

Use Greentic-hosted deployment

Deploy on greentic.cloud with no cloud account required.
COMING SOON

Bring your own AWS account

Deploy into the customer's AWS account with supplied credentials.
COMING SOON

Bring your own Azure subscription

Deploy into the customer's Azure subscription.
COMING SOON

Bring your own Google Cloud project

Deploy into the customer's Google Cloud project.
COMING SOON

Enable or disable deployment targets

Control which clouds appear when creating an environment.
COMING SOON

Add an environment

Create the destination where a tenant's packs get deployed.
COMING SOON

Troubleshoot deployment configuration

Resolve common target and environment issues.
COMING SOON

[← Back to Admin Guides](#)

Scope: individual tenant

 Access settings apply to the selected tenant

A partnership administrator can configure each member tenant independently according to the customer's identity and governance requirements.

How tenant access is organised

Tenant access is split across three related areas.

1. Sign-in and identity

Control password login, single sign-on, email domains, provisioning and local users.

2. Teams

Group users for membership and solution-level scoping.

3. Roles

Control which Designer capabilities each user may access.

```
graph TD
    A[User identity] --> B[Sign-in or SSO]
    B --> C[Tenant user]
    C --> D[Team membership]
    D --> E[Designer roles]
```

 Authentication determines who the user is. Teams organise where the user belongs. Roles determine what the user can use.

```
graph LR
    A[Access] --- B[SSO & users]
    A --- C[Teams]
    A --- D[Roles]
    B --- E[Sign-in]
    B --- F[SSO]
    B --- G[Domains]
    B --- H[Provisioning]
    B --- I[Users]
```

Access and identity guides



Choose a sign-in method

Enable local password login or prepare the tenant for single sign-on.

 4 min read



Configure single sign-on

Use Greentic-managed SSO or connect an external OpenID Connect identity provider.

 5 min read



Configure email domains

Route users from recognised company domains to the tenant's SSO configuration.

 4 min read



Add and manage users

Create local tenant users and review identities provisioned through the identity service.

 4 min read



Configure SCIM provisioning

Connect an identity provider for directory provisioning and synchronise tenant users.

🕒 5 min read



Create and manage teams

Group users for membership and tenant-level scoping.

🕒 3 min read



Assign Designer roles

Control which users may access agentic workers, the Flow Editor and other Designer surfaces.

🕒 4 min read



Troubleshoot access

Resolve common sign-in, provisioning, domain and role-assignment issues.

🕒 5 min read

Choose how users sign in

A tenant can use local password accounts, single sign-on or a combination allowed by its configuration.

Password login

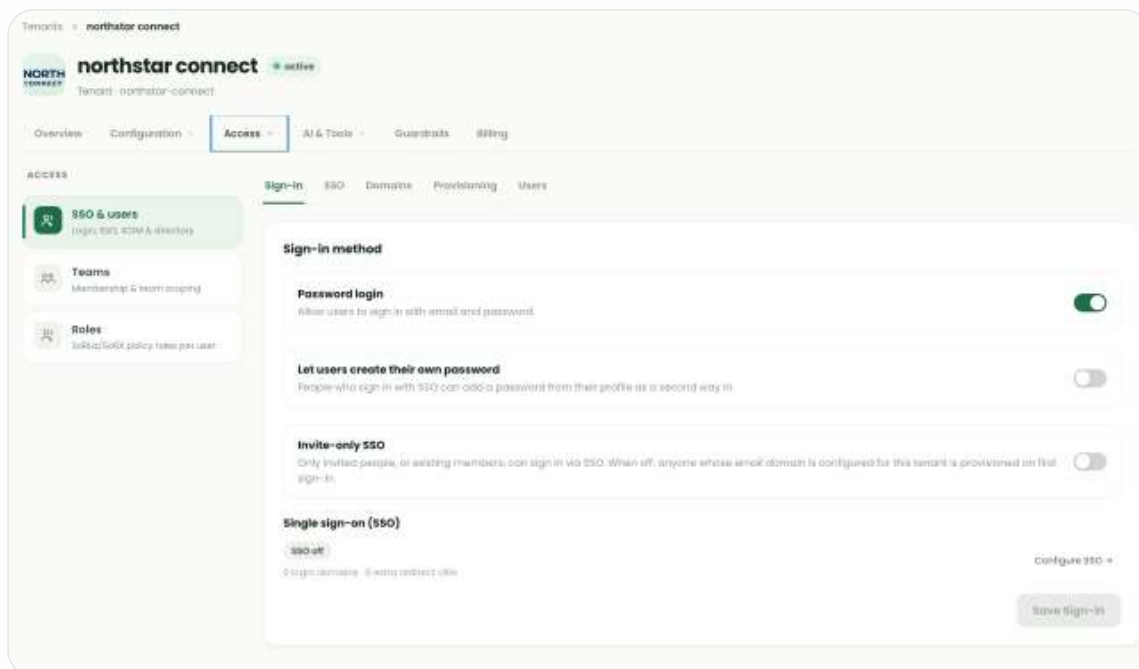
Users sign in using an email address and password stored for the tenant.

Greentec SSO

Greentec operates the identity service and manages the tenant's OIDC client.

External OIDC

The tenant connects to a customer-managed OpenID Connect identity provider.



The Sign-in tab controls password login and SSO entry rules.



Recommendation

Use local password accounts for initial testing or a small controlled user group. For customer production environments, configure the organisation's preferred single sign-on method where available.

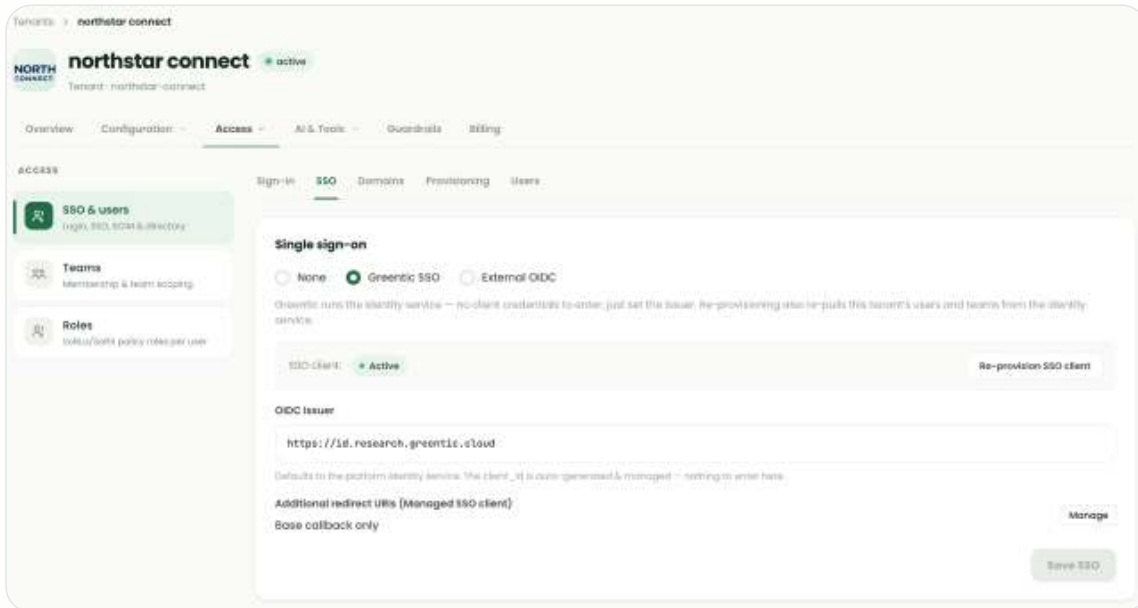
The Sign-in tab also controls

- Whether password login is enabled
- Whether SSO users may create a password
- Whether SSO access is restricted to invited or existing users

[Read the sign-in guide →](#)

Connect single sign-on

The SSO tab determines which identity service the tenant uses.



Greentec SSO with the managed SSO client in the Active state.

None

The tenant does not use SSO.

Greentec SSO

Greentec manages the OIDC client. The administrator selects the identity service and activates or re-provisions the tenant client.

External OIDC

The customer supplies and manages its own OpenID Connect configuration.

- 1 Open the tenant.
- 2 Select Access.
- 3 Open SSO & users.
- 4 Select the SSO tab.
- 5 Choose Greentec SSO.
- 6 Confirm the OIDC issuer.
- 7 Save the SSO configuration.
- 8 Provision or re-provision the SSO client when required.
- 9 Confirm that the SSO client status is Active.

ⓘ Do not treat SSO as ready too early

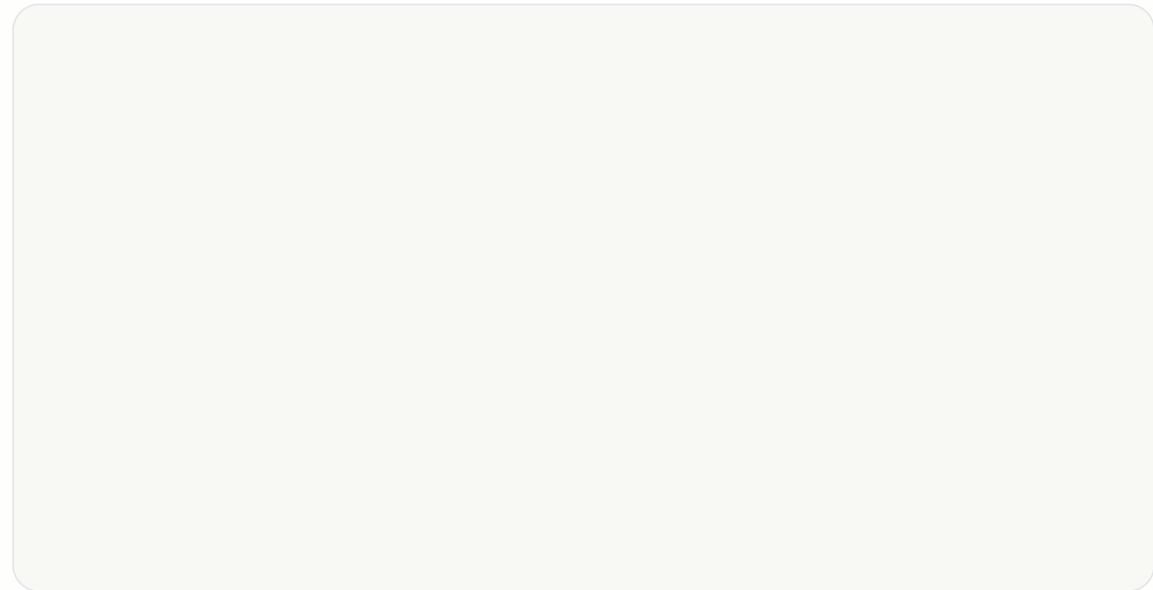
SSO is not usable until the SSO client shows an Active status.

- ⓘ Re-provisioning refreshes the managed client and may also re-pull the tenant's users and teams from the identity service.

[Read the SSO guide →](#)

Route company domains to SSO

Email domains associate company email addresses with the tenant's SSO configuration.



Domains route recognised company email addresses to the tenant's SSO.

Unverified domain

Users from the domain can be routed to SSO, but domain ownership has not been confirmed.

Verified domain

The required DNS record has been published and confirmed. Depending on the tenant configuration, users from the domain may self-onboard.

- 1 Configure and activate SSO first.
- 2 Open Access → SSO & users → Domains.
- 3 Enter the customer's email domain, such as acme.com.
- 4 Select Add domain.
- 5 Save the domain list.
- 6 Start domain verification.
- 7 Copy the generated DNS TXT record.
- 8 Ask the customer's domain administrator to publish it.
- 9 Verify the domain again after DNS propagation.

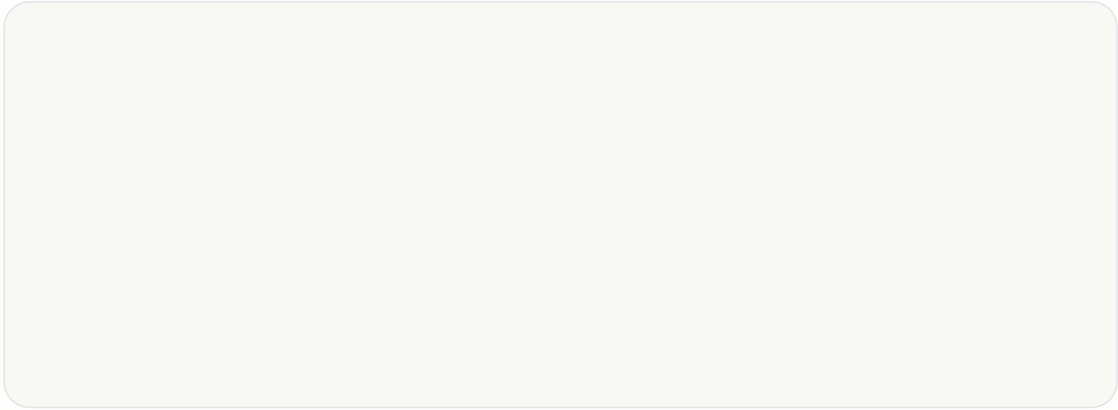
ⓘ Email domains are not web domains

Email domains are used for identity routing. They are not the same as the custom web domain used to access the branded Designer. **See custom domains.**

[Read the domains guide](#) →

Add local users

The Users tab lists identities available within the tenant. Local users can be created directly when password login is enabled, while SSO or provisioned users may arrive through the configured identity service.



The Users tab lists tenant identities.



Add user creates a local password account.

- 1 Open Access → SSO & users → Users.
- 2 Select Add user.
- 3 Enter the user's email address.
- 4 Optionally enter a display name.
- 5 Select the initial role available in the form.
- 6 Create a secure password that meets the displayed requirements.
- 7 Select Create user.

1 Prefer centrally managed identity

Only create local password users when they are required by the tenant's chosen sign-in model. Prefer centrally managed identity for larger customer deployments.

2 Show merged

When supported by the tenant configuration, merged results can help display identities collected from multiple identity or provisioning sources.

[Read the users guide →](#)

Provision users from an identity provider

SCIM provisioning enables a customer identity provider, such as Microsoft Entra ID or Okta, to create and update users in the tenant directory.

Provisioning exposes the SCIM base URL, token generation and user sync.

Inbound SCIM provisioning

Use the SCIM base URL and a generated token to connect the customer's identity provider.

User synchronisation

Pull tenant users from the connected identity service manually or on the platform schedule.

- 1 Open Access → SSO & users → Provisioning.
- 2 Copy the SCIM base URL.
- 3 Enter a descriptive token label, such as "Customer Entra ID".
- 4 Generate the provisioning token.
- 5 Copy and store the token securely when it is shown.
- 6 Configure the customer identity provider using the SCIM URL and token.
- 7 Use Sync now to test user synchronisation.
- 8 Enable scheduled auto-sync where appropriate.

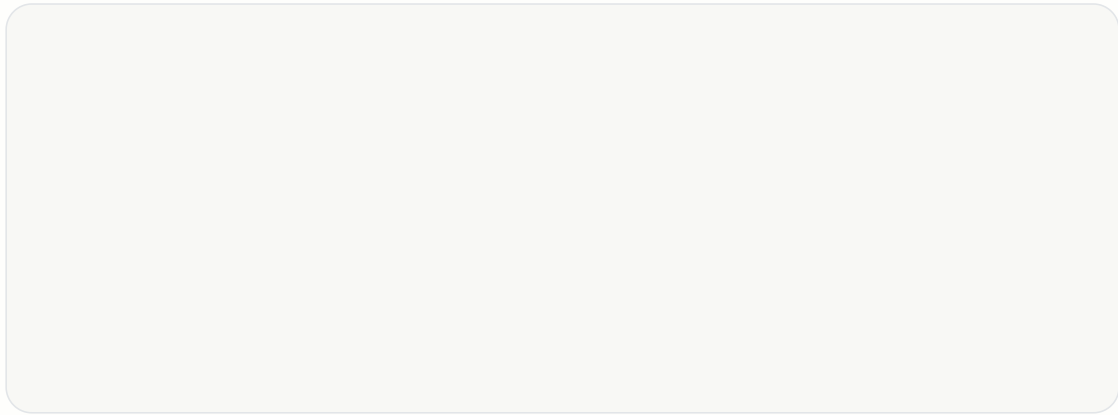
3 Treat SCIM tokens as secrets

Do not place them in documentation, screenshots, source control or unsecured messages.

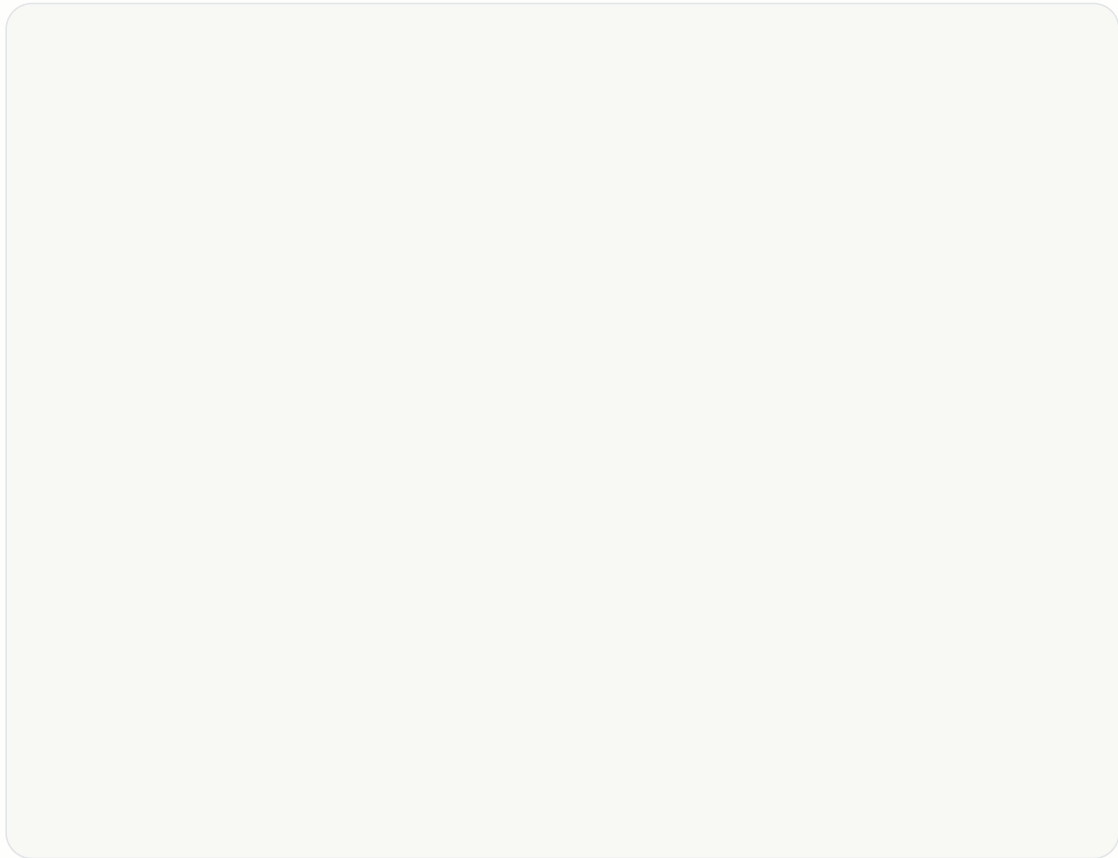
[Read the provisioning guide →](#)

Organise users into teams

Teams group tenant users for membership and solution-level scoping. Every tenant may include a default General team, and additional teams can be created for business units, projects or customer groups.



Teams list membership and scoping groups for the tenant.



Add team asks for a slug and a display name.

- 1 Open Access → Teams.
- 2 Select Add team.
- 3 Enter a stable slug.
- 4 Enter the user-facing team name.
- 5 Select Save.
- 6 Open Members for the team.
- 7 Add the relevant tenant users.

 Use concise, stable slugs because they may be referenced by policies or integrations. Use clear display names that users and administrators will recognise.

General

Customer Service

Default tenant membership.

Users responsible for customer support solutions.

Operations

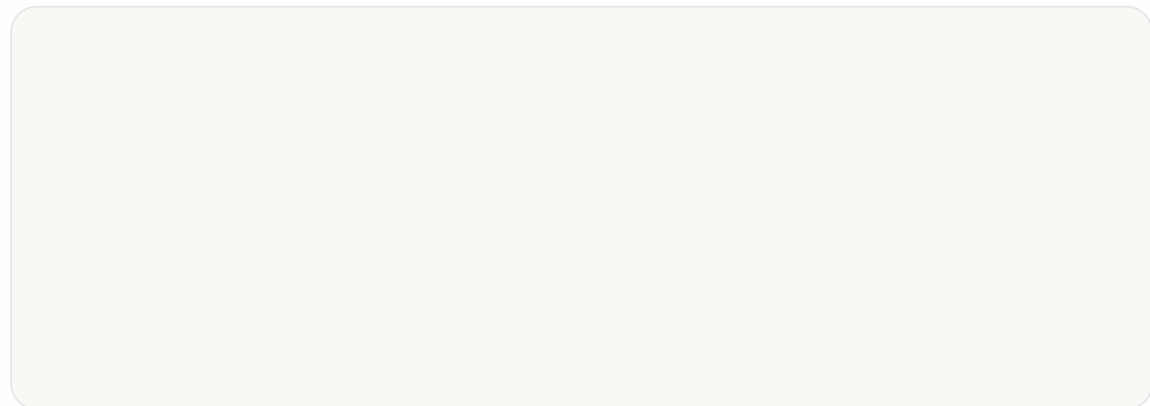
Users responsible for operational workflows.

These are examples only. Apart from a default team, teams are not created automatically.

[Read the teams guide →](#)

Control access to Designer capabilities

Roles determine which Designer surfaces and capabilities each tenant user can access.



Roles are assigned per user, per capability.

Agentic Worker

Access to agentic worker capabilities.

Flow Editor

Access to deterministic flow-design functionality.

SoRLa

Access to supported SoRLa composition capabilities.

OperaLa

Access to supported OperaLa composition capabilities.

Telco-X Playbook

Access to the Telco-X Playbook Composer where enabled.

- 1 Open Access → Roles.
- 2 Find the user by name or email.
- 3 Select the capabilities the user requires.
- 4 Remove access that is not needed.
- 5 Confirm that the role changes have been saved or applied.

ⓘ Grant least privilege

Grant only the capabilities required for the user's responsibilities. Review role assignments when users change teams, projects or responsibilities.

[Read the roles guide →](#)

Recommended identity setup order

- 1 Decide whether the tenant will use passwords, SSO or both.

- 2 Configure and activate the SSO client where required.
- 3 Add and verify customer email domains.
- 4 Configure SCIM provisioning or add initial local users.
- 5 Synchronise and confirm the tenant user list.
- 6 Create the required teams.
- 7 Add users to teams.
- 8 Assign the minimum required Designer roles.
- 9 Test sign-in using a non-administrator account.
- 10 Review the configuration before production launch.

 Always test with a normal user account

An administrator's existing session may hide routing, permissions or onboarding problems.

Troubleshooting at a glance

PROBLEM	LIKELY CAUSE	ACTION
SSO client is not provisioned	Greentec SSO was selected but the managed client has not been activated.	Save the SSO configuration and provision or re-provision the client.
The domain page says Awaiting SSO	An email domain was added before SSO became active.	Configure and activate SSO, then return to the Domains tab.
Users do not appear	Provisioning has not run, sync is disabled or the identity provider is not connected.	Review the SCIM configuration and use Sync now.
A user can sign in but cannot use a Designer capability	The required capability role has not been assigned.	Open Roles and grant the minimum required capability.
A user appears in the tenant but not in the expected team	Identity provisioning and team membership are separate.	Open Teams and review the team's Members list.

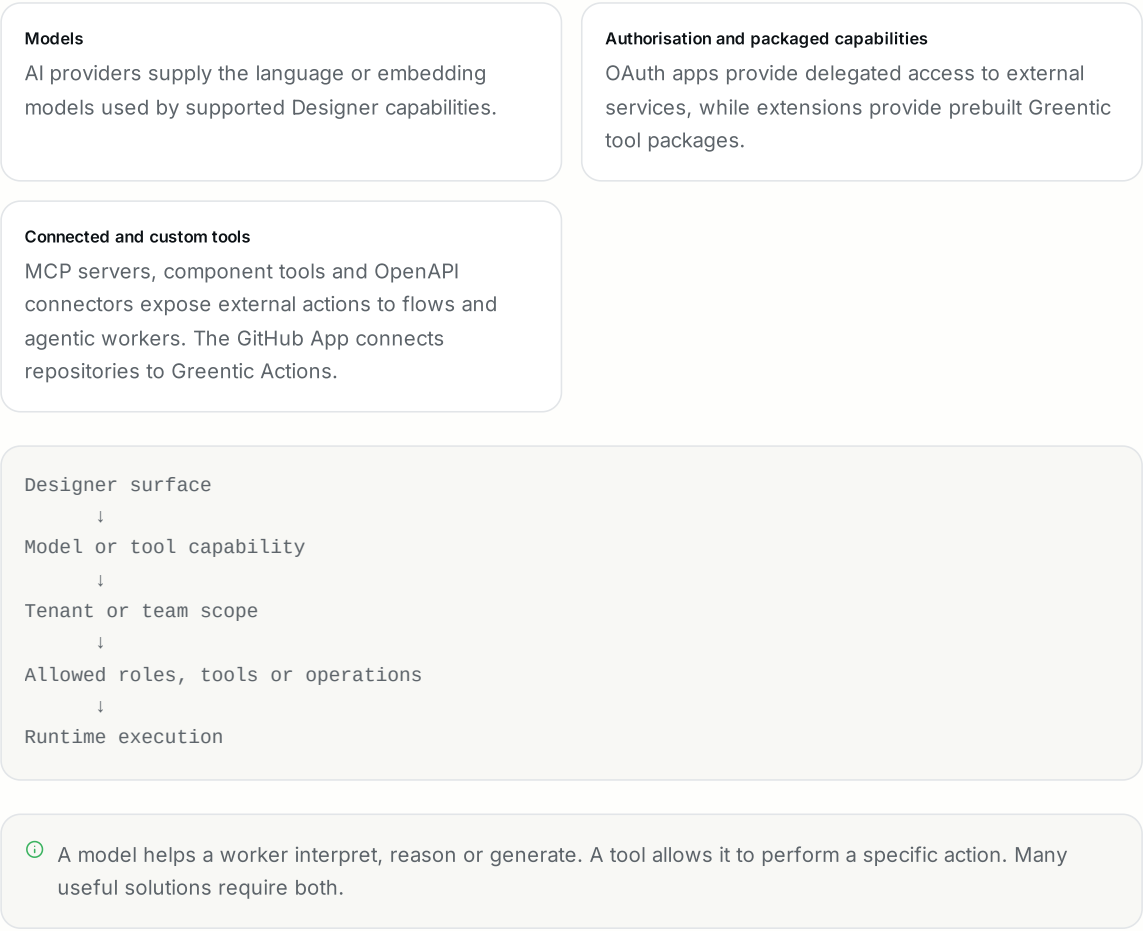
[Read the troubleshooting guide](#) →

[← Back to Admin Guides](#)

Scope: individual tenant

How AI and tools fit together

AI & Tools brings together three related layers.



Manage extensions →

Find, configure, enable and scope installed tool extensions.

Connect an MCP server →

Add a remote server, restrict its tools and choose its Designer surfaces.

Register a component tool →

Expose selected operations from a gtc or Wasm component.

Create an OpenAPI connector →

Generate a connector component from an OpenAPI or Swagger specification.

Connect the GitHub App →

Understand the deployment prerequisite and connect repositories when available.

Before you begin

- Open the correct customer tenant before changing AI & Tools settings.
- Confirm whether the capability should be tenant-wide or limited to a team.
- Obtain the required provider credentials, OAuth configuration, server URL, component reference or API specification.
- Decide which Designer surfaces genuinely require access.
- Use test credentials and non-production integrations while validating a new setup.

🛡️ Protect credentials

API keys, client secrets, registry tokens and MCP authentication tokens are secrets. Never place them in documentation, screenshots, source control or unsecured messages. Saved values may be sealed completely or displayed only in masked form.

Add an AI provider

AI providers connect an LLM or embedding model to the tenant. Provider roles determine which supported Designer surfaces may use that provider.

The screenshot displays the 'AI & Tools' configuration page in the Northstar Connect interface. The page is for the 'northstar connect' tenant, which is marked as 'active'. The 'AI & Tools' tab is selected in the top navigation bar. On the left, a sidebar lists various configuration options: AI providers (selected), OAuth apps, Extensions, MCP servers, Component tools, OpenAPI connectors, and GitHub App. The main area shows a table of AI providers. The table has columns: TYPE, PROVIDER, LABEL, BASE URL, STATUS, ROLES, and ACTIONS. One provider is listed: 'deepseek' with type 'LLM', label 'deepseek', and status 'enabled'. To the right of the table, there is a list of roles that can be assigned to the provider: 'Agentix Worker', 'Flow Editor', 'Sella Composer', 'Operato Composer', and 'Talon-X Playback Composer'. A '+ Add provider' button is in the top right corner. A note at the bottom states: 'Roles control which Designer surfaces they can use with provider. Changes apply immediately.'

TYPE	PROVIDER	LABEL	BASE URL	STATUS	ROLES	ACTIONS
LLM	deepseek	deepseek		enabled	Agentix Worker, Flow Editor, Sella Composer, Operato Composer, Talon-X Playback Composer	

Provider rows show the model status and the Designer capabilities allowed to use it.

Choose the provider and model, then add tenant-specific credentials and access settings.

Type

Select the model capability being connected, such as an LLM or embedding provider.

Provider

Select the model provider. Treat the providers visible in the screenshot as examples rather than a permanent list.

Model

Enter the exact model identifier supported by that provider.

Label

Give the connection a clear administrative name.

Base URL

Leave the default where appropriate, or set the endpoint required by a compatible service, gateway or self-hosted model.

API key

Enter the credential issued for this tenant or environment.

Tenant access

Control whether teams or individual flows may override the tenant default.

Designer roles or surfaces

Grant the provider only to the capabilities that require it.

- 1 Open the tenant.
- 2 Select AI & Tools.
- 3 Open AI providers.
- 4 Select Add provider.
- 5 Choose the provider type and provider.
- 6 Enter the exact model identifier.
- 7 Add a descriptive label.
- 8 Review the base URL.
- 9 Enter the API key.
- 10 Choose the tenant access policy.
- 11 Select the required Designer roles or surfaces.

- 12 Create the provider.
- 13 Confirm that it appears as enabled and has the expected roles.

Use precise model identifiers

The display name of a model and its API identifier may be different. Use the identifier expected by the provider.

Grant the minimum required roles

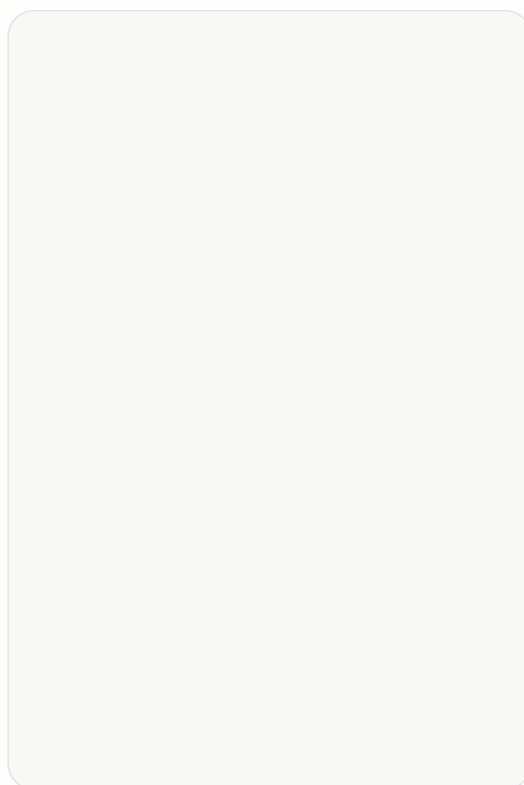
A provider does not need to be exposed to every Designer capability. Limit access to the surfaces that actually use it.

Credential behaviour

Provider secrets are encrypted at rest. After saving, the interface may expose only a small masked portion of the value.

Configure an OAuth app

An OAuth app registers the customer or provider application Greentic uses when a user authorises an agent to act through an external service. Creating the OAuth app does not by itself grant access to a user's account; the user authorisation step still needs to occur where supported.



OAuth app configuration stores the provider's client settings, access scope and authorisation endpoints.

Provider identifier

The external service being registered.

OAuth application kind

The credential model used by that provider.

Optional team slug

Limits the configuration to a single team when required.

Tenant access policy

Whether teams or flows may override the tenant default.

Client credentials

Requested scopes

The client ID and secret issued by the external provider.

The permissions requested during user authorisation.

Authorisation URL

The endpoint where the user grants access.

Token URL

The endpoint used to exchange and refresh tokens.

- 1 Open AI & Tools → OAuth apps.
- 2 Select Add OAuth app.
- 3 Enter the provider identifier.
- 4 Select the appropriate OAuth application kind.
- 5 Add a team slug only when the configuration should be team-specific.
- 6 Choose the tenant access policy.
- 7 Enter the client credentials.
- 8 Add only the scopes required by the intended tools.
- 9 Confirm the authorisation and token endpoints.
- 10 Create the OAuth app.
- 11 Complete a test user authorisation before relying on it in a solution.

 OAuth scopes are permissions

Request the narrowest set of scopes that allows the required actions. Avoid broad administrative scopes unless the use case genuinely requires them.

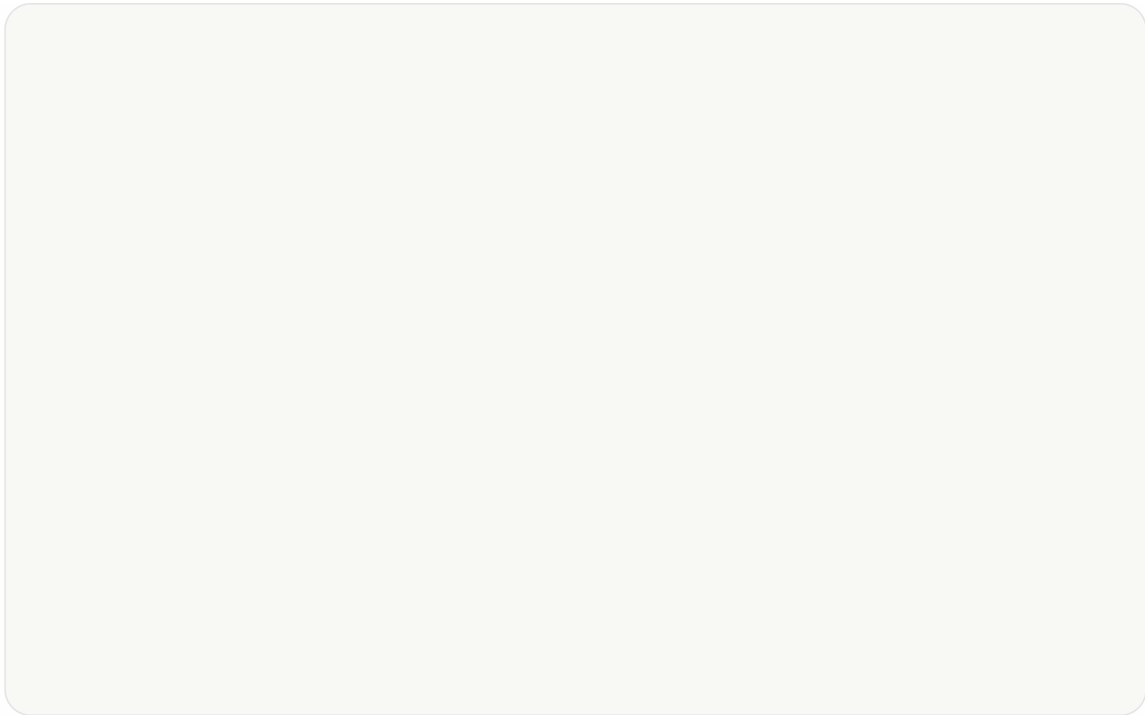
 Team-specific configuration

Use the optional team scope when different business units require separate applications, credentials or permissions.

-  Callback, authorisation and token values differ for every provider. Use the values supplied by the external provider and by the Greentic deployment rather than assuming a standard pattern.

Manage extensions

Extensions are prebuilt Greentic tool packages installed for a tenant. Treat visible extension names, counts and versions as examples only.



Installed extensions can be searched, filtered, configured and enabled for the selected scope.

Scope

Selects the tenant default or another supported scope.

Search and filters

Help administrators find an extension by name, publisher, domain or status.

Browse store

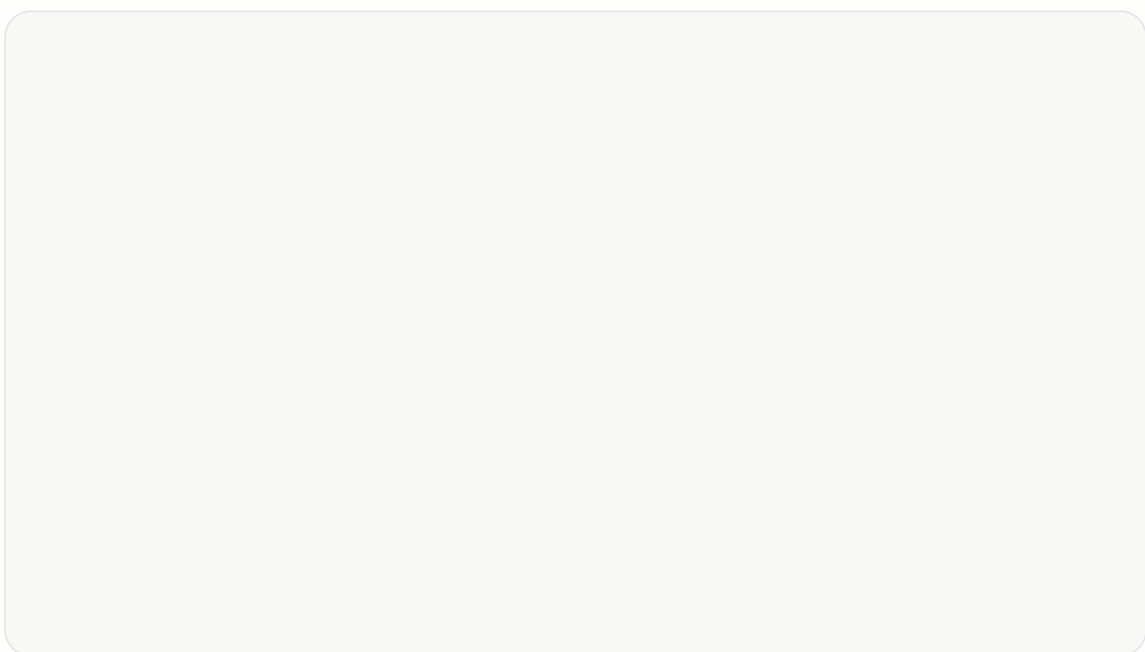
Used to discover available extensions.

Setup

Opens extension-specific deployment and credential settings.

Toggle

Controls whether the extension is enabled for the selected scope.



Configure the deploy pack and required credentials before enabling an extension.

Team

Environment

Select tenant-wide or a supported team scope.

Choose the relevant runtime environment.

Deploy pack ID

Enter the pack identifier expected by the runtime.

Credentials

Add the aliases and secret values required by that extension.

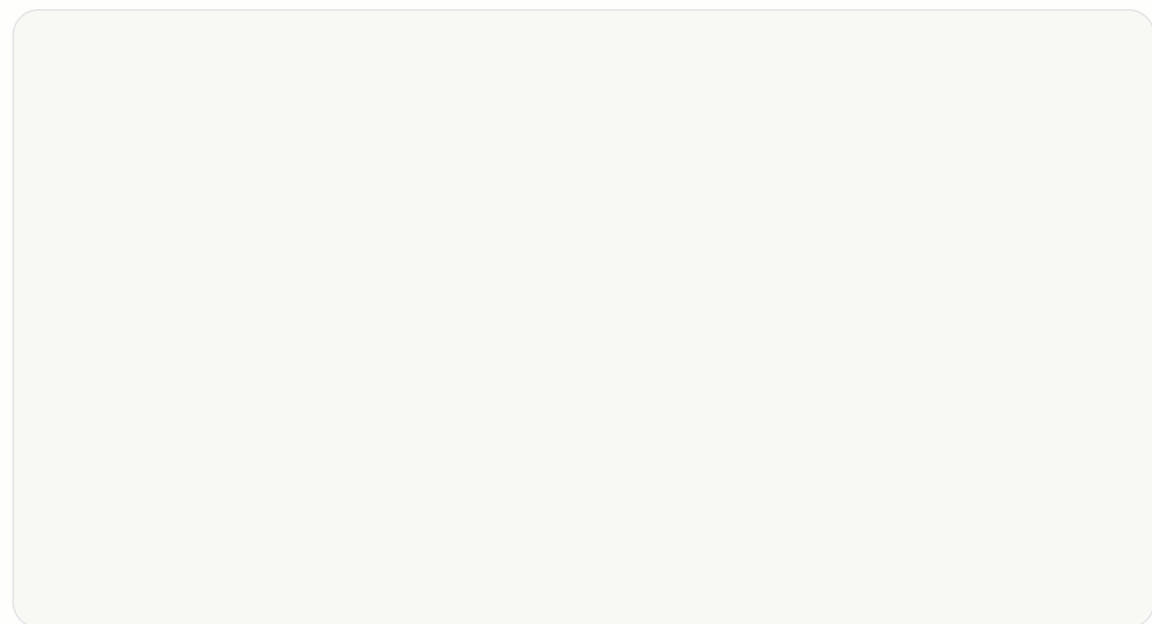
- 1 Open AI & Tools → Extensions.
- 2 Select the correct scope.
- 3 Search for the extension or select Browse store.
- 4 Install the required extension where it is not already installed.
- 5 Select Setup.
- 6 Choose the team and environment.
- 7 Enter and save the deploy pack ID.
- 8 Add the required credentials.
- 9 Close the setup dialog.
- 10 Enable the extension.
- 11 Test one representative tool operation.

ⓘ Configure before enabling

An extension may require a deploy pack ID and credentials before it can be activated successfully. Do not assume that switching on the toggle completes its setup.

Connect an MCP server

MCP servers expose remote tools to the tenant's Designer surfaces.



Add a remote MCP server directly or choose a packaged server from the store.

Add from store

Select a packaged MCP integration where available.

Add server

Connect a remote MCP endpoint manually.

The two screenshots below are the upper and lower parts of the same Add server form.

Name the server, enter its transport URL and choose its tenant or team scope.

Restrict the exposed tools and choose the Designer surfaces that may use the server.

Name A stable administrative name for the server.	Transport URL The remote MCP endpoint.
Scope Tenant default or a selected team.	Tenant access Whether teams or flows may override the tenant default.
Authentication header name	Authentication token

The HTTP header expected by the server.

The sealed credential sent to the server. It may be left blank for a public tokenless server.

Allowed tools

A tool allow-list. An empty value exposes every tool reported by the server.

Enabled

Controls whether the server is available.

Designer surfaces

Select Flow Editor, Agentic Worker or both where supported.

 How scope resolution works

A team-scoped MCP server with the same name overrides the tenant default for that team only.

- 1 Open AI & Tools → MCP servers.
- 2 Select Add server.
- 3 Enter a clear server name.
- 4 Enter the transport URL.
- 5 Choose tenant-wide or team scope.
- 6 Review the tenant access policy.
- 7 Add the authentication header and token where required.
- 8 Restrict the allowed tools where possible.
- 9 Enable the server.
- 10 Select the Designer surfaces allowed to use it.
- 11 Create the server.
- 12 Confirm its status and test a permitted tool.

 Prefer an allow-list

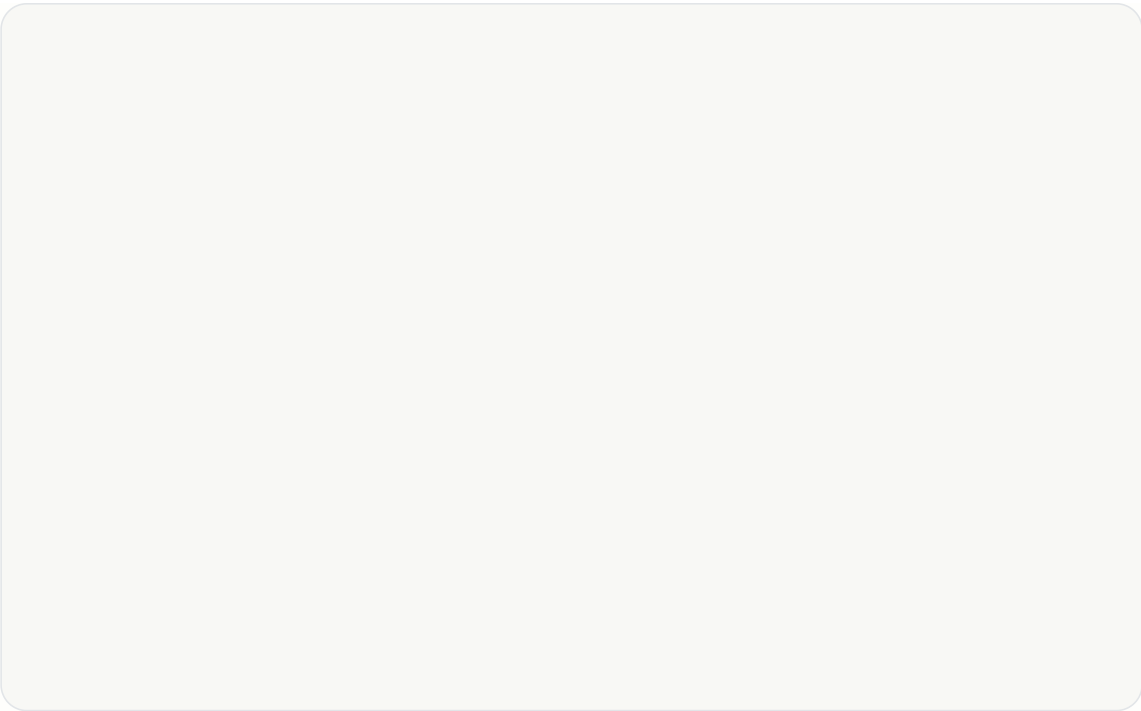
Leaving Allowed tools empty exposes every tool advertised by the MCP server. For production use, explicitly list the tools the solution requires.

 A successful connection is not sufficient

Also confirm that the correct Designer surface is selected and that the required tool has not been excluded by the allow-list.

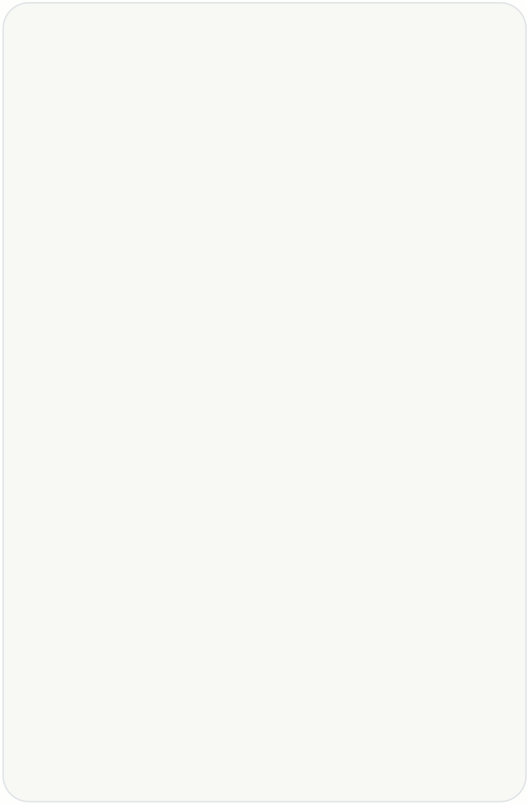
Register a component tool

Component tools register a gtc or Wasm component from a store, OCI registry or repository URL. Greentic inspects its operations and exposes permitted operations as tools.



Component tools and private-registry credentials are managed separately.

The page has two areas: Component tools, where components are registered, and Registry credentials, where private-registry access is stored.



Register a component by source and optionally restrict the operations exposed to the agentic worker.

Name A clear administrative name for the component.	Source URL The store, OCI or repository URL of the component.
Component reference Optional reference identifying the component.	Version Optional component version.
Digest Optional digest that pins an exact build.	Allowed operations

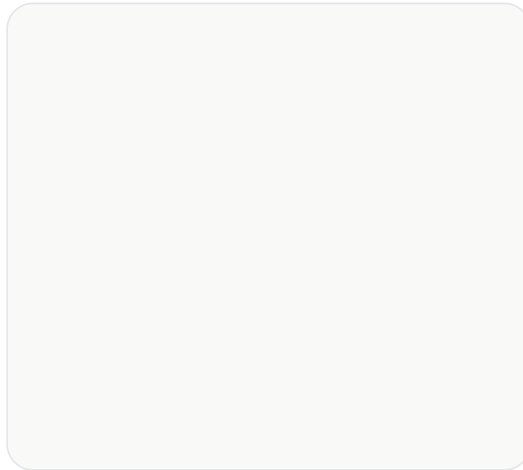
An empty value exposes every operation reported by the component, while an explicit list limits what is available.

Enabled status

Controls whether the component tool is available.

- 1 Open AI & Tools → Component tools.
- 2 Add a registry credential first when the source is private.
- 3 Select Add component tool.
- 4 Enter a clear name.
- 5 Enter the store, OCI or repository source URL.
- 6 Add the component reference, version or digest where required.
- 7 Restrict the allowed operations.
- 8 Enable the component.
- 9 Create the component tool.
- 10 Confirm that its operations can be inspected and exposed.

Access a private component registry



Private-registry credentials allow Greentic to inspect and pull protected components.

Registry host

The host serving the private packages.

Username

The service or bot account used for the pull.

Registry token

A token with only the required package-read permissions.

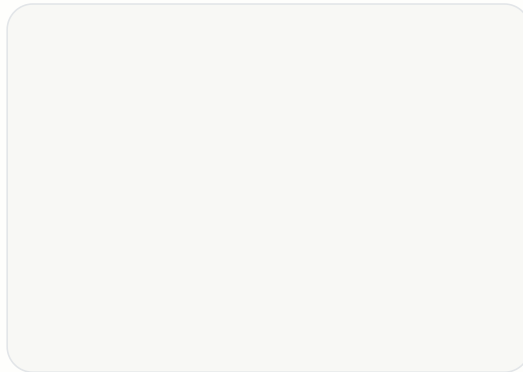
- 1 Select Add credential.
- 2 Enter the registry host.
- 3 Enter the service or bot username.
- 4 Enter a token with only the required package-read permissions.
- 5 Create the credential.
- 6 Return to the component tool and retry registration.

Registry tokens are write-only secrets

Once saved, registry tokens are not displayed again. Store the original securely and rotate it according to the customer's credential policy.

Create an OpenAPI connector

This feature generates a connector component from a specification. It is not the same as connecting directly to a remote MCP server. The resulting component can subsequently be registered and exposed as a tool.



Upload an OpenAPI or Swagger specification to build a connector component.

- 1 Open AI & Tools → OpenAPI connectors.
- 2 Select New connector.
- 3 Enter a concise connector name.
- 4 Select a supported OpenAPI or Swagger specification file.
- 5 Select Upload spec.
- 6 Review the generated connector's status and component information after processing.
- 7 Correct the specification and upload it again if validation fails.
- 8 Register or configure the resulting component as required by the tenant.

Use a clean specification

The specification should describe operations and schemas consistently. Resolve validation errors before using the generated connector in a customer solution.

Do not embed secrets

Do not place working API keys, passwords or access tokens inside the uploaded specification. Configure runtime credentials separately through the supported credential mechanism.

Connect the GitHub App

The GitHub App connects repositories to Greentic Actions so supported repository activity, such as pushes, can trigger flows.

Tenant connection is unavailable until the deployment's GitHub App is configured by a platform administrator.

Platform administrator

Configures the deployment-level GitHub App credentials.

Partnership administrator

Can connect the tenant only after that prerequisite is complete.

The state shown

The screenshot represents an unavailable prerequisite state, not a successful connection.

- 1 Open AI & Tools → GitHub App.
- 2 Review the displayed status.
- 3 Select refresh to check the deployment configuration again.
- 4 When the page says the GitHub App is not configured on the deployment, contact the Greentic platform administrator.
- 5 Ask the platform administrator to configure the App ID, app slug and private key.
- 6 Return to the tenant and refresh the status.
- 7 Continue with the repository connection controls that become available after the deployment prerequisite is satisfied.

ⓘ This cannot be fixed from the tenant page

When deployment-level GitHub App credentials are missing, a partnership administrator cannot resolve the issue by changing tenant settings.

Recommended setup order

- 1 Add and validate the required AI provider.
- 2 Decide which capabilities are tenant-wide and which are team-specific.
- 3 Configure OAuth or other credentials.
- 4 Install and configure prebuilt extensions.
- 5 Connect MCP servers or register custom components.
- 6 Generate OpenAPI connectors where an existing API specification is available.
- 7 Restrict roles, tools, scopes and operations.
- 8 Test every capability from the Designer surface that will use it.
- 9 Test using a normal tenant user where possible.
- 10 Review secrets and permissions before production use.

 Test from the actual surface

An integration can appear enabled in Admin but still be unavailable to a flow or agentic worker because of its scope, allowed-tool list, operation restrictions or Designer surface assignment.

Troubleshooting at a glance

PROBLEM	LIKELY CAUSE	ACTION
A model does not appear in Designer	The provider is disabled or the required Designer role was not selected	Edit the provider and review its status and role assignments
An OAuth connection fails	Incorrect client credentials, scopes or provider endpoints	Compare the app configuration with the external provider's settings
An extension cannot be enabled	Deploy pack ID or required credentials are missing	Open Setup, save the deploy pack and add the required credentials
An MCP server connects but its tools are missing	Allowed tools excludes them or the required Designer surface is not selected	Review the allow-list and surface checkboxes
A component cannot be inspected	The source reference is invalid or the private registry cannot be accessed	Check the source URL, version and registry credential
An OpenAPI connector fails to build	The uploaded specification is invalid or inconsistent	Validate and correct the specification, then upload it again
A saved secret is no longer visible	Secrets are intentionally sealed or masked	Replace the credential when necessary rather than expecting to retrieve it
The GitHub App cannot be connected	Deployment-level GitHub App credentials are absent	Contact the platform administrator and refresh after configuration

[← Back to Admin Guides](#)

Scope: individual tenant

Guardrails apply to the selected tenant

Each tenant has its own guardrail policies. Always confirm the tenant name before adding, changing, enabling or exporting a policy.

How guardrails work

A guardrail capability is the underlying control. A guardrail policy is how that control is configured for one tenant.

Guardrail capability

The underlying control, such as prompt-injection protection, PII masking or topic restriction.

Guardrail policy

The tenant-specific configuration that selects a capability, optionally limits it to an environment and supplies any capability-specific settings.

```
Tenant interaction
↓
Matching environment policy
↓
Guardrail capability
↓
Monitor or enforce
↓
Status and violation indicators
```

Saving a guardrail policy does not automatically prove that the selected capability is available or enforcing. Review its Availability, Mode and Enabled status after it has been created.

Status definitions

Active guardrails

Policies currently active for the tenant.

Enforcing

Policies operating in enforcement mode rather than monitoring-only mode.

Violations (7d)

The number of recorded policy violations during the previous seven days, when violation data is available.

Availability

The platform-reported availability status for the selected guardrail capability.

Monitor

Observes or records matching activity without applying the full enforcement behaviour, where supported.

Enforce

Actively applies the configured policy behaviour.

Enabled

Controls whether the individual policy is switched on.

Start cautiously

Where Monitor mode is available, use it to test a new policy with representative traffic before changing it to Enforce. This helps identify overly broad rules and false positives.

Guides in this section

Understand guardrail status →

Read the active, enforcing, availability and violation indicators.

Add a built-in guardrail →

Select a capability, target an environment and configure its rules.

Configure guardrail capabilities →

Understand the settings used by PII, prompt-injection, profanity and topic controls.

Add a custom guardrail →

Register an approved capability ID with raw JSON configuration.

Review and export policies →

Search, filter and export the tenant's policy configuration.

Troubleshoot guardrails →

Resolve unavailable capabilities, permission errors and policies that do not apply as expected.

Before you begin

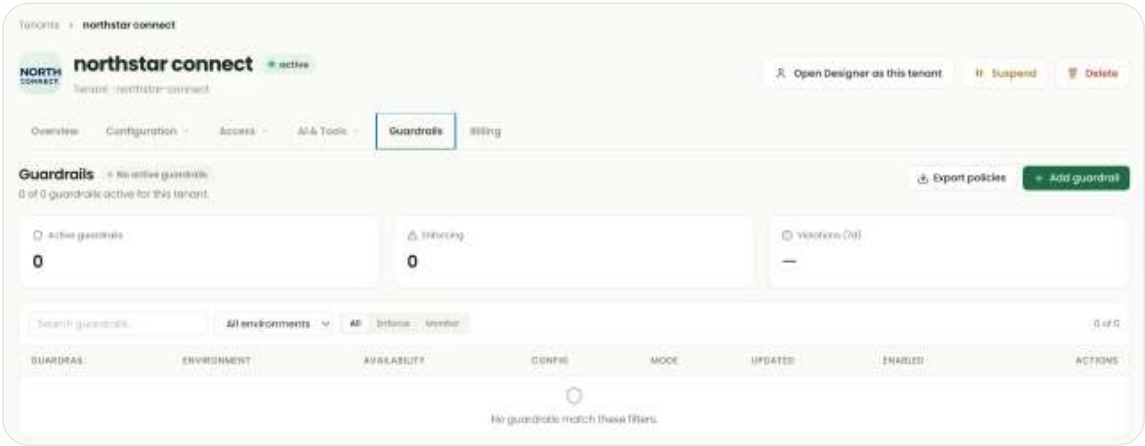
- Open the correct customer tenant.
- Decide whether the policy applies to every environment or one named environment.
- Identify the guardrail capability required by the customer use case.
- Prepare any blocked words, additional masked words or allowed topics.
- For a custom guardrail, obtain the exact approved capability ID and configuration schema.
- Decide whether the policy should initially monitor or enforce.
- Prepare representative test inputs, including acceptable content and content that should be flagged.

Guardrails complement access controls

Guardrails govern eligible tenant interactions. They do not replace user permissions, tool allow-lists, deterministic workflow validation or secure handling of credentials.

Review the Guardrails page

The Guardrails page is the single view of policy status, filters and policy actions for the tenant.



The Guardrails page summarises policy status and provides filters, policy actions and export controls.

Active guardrails

Shows the number of active policies for the tenant.

Enforcing

Shows how many policies are operating in enforcement mode.

Violations (7d)

Status label

Shows the recent violation count when data is available.

The label beside the page title summarises whether the tenant currently has active guardrails.

Filters

- Search for a guardrail by name or capability.
- Filter by environment.
- Filter by All, Enforce or Monitor.
- Clear filters when an expected policy is missing from the table.

COLUMN	SHOWS
Guardrail	The policy and the capability it uses
Environment	The environment the policy is limited to, when one is set
Availability	The platform-reported availability of the capability
Config	The configuration supplied for the policy
Mode	Whether the policy monitors or enforces
Updated	When the policy was last changed
Enabled	Whether the individual policy is switched on
Actions	The row actions available in the current deployment

The overview screenshot above represents a tenant with no configured guardrails. It is an example of the interface, not an example of a configured policy set.

ⓘ A dash is not necessarily zero

When the Violations card displays a dash rather than 0, do not interpret it as a confirmed absence of violations. First confirm that guardrail status and violation data are available.

Add a built-in guardrail

The Add guardrail form changes according to the selected capability, so complete only the fields it shows.

- 1 Open the customer tenant.
- 2 Select Guardrails.
- 3 Select Add guardrail.
- 4 Choose the required capability.
- 5 Enter an environment when the policy should apply only to that environment.
- 6 Leave Environment blank when the policy should apply to all environments.
- 7 Complete the capability-specific settings.
- 8 Select Save.
- 9 Find the saved policy in the table.
- 10 Review its Availability, Mode and Enabled columns.
- 11 Test the policy with representative inputs.
- 12 Move to enforcement only after confirming that expected interactions continue to work.

ⓘ Blank Environment means all

Only enter an environment when the policy should be limited to that exact environment. A policy with no environment value applies across the tenant's environments.

ⓘ "Availability not checked" is not an enabled status

The capability selection shown in the form has not yet had its availability confirmed. After saving, inspect the Availability column before relying on the policy.

Configure built-in capabilities

Different guardrail capabilities expose different configuration fields. Configure only the settings shown for the selected capability.

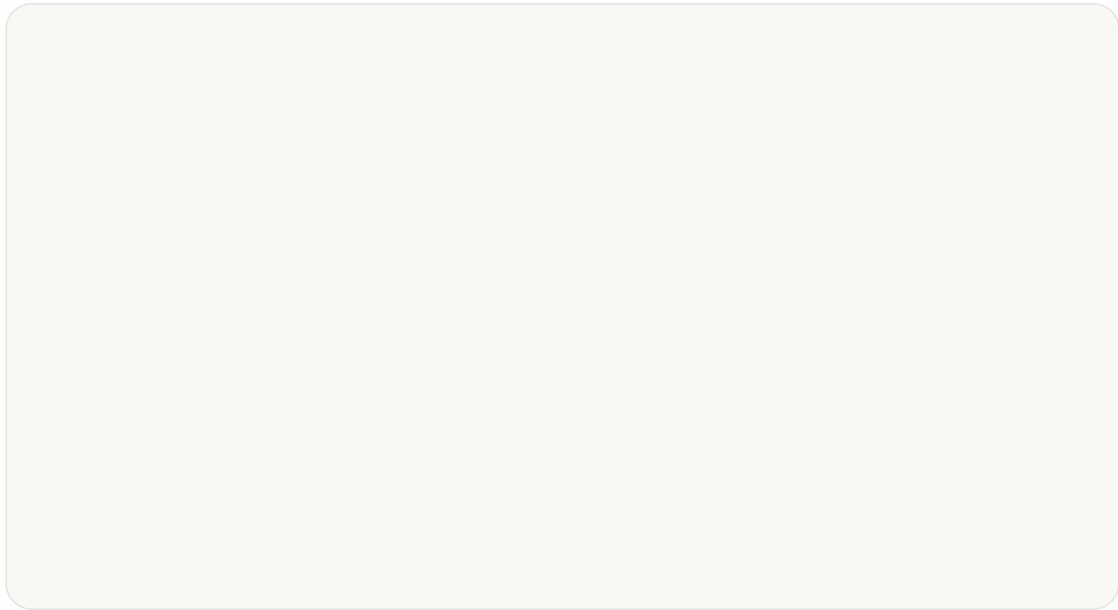
PII masking can be combined with a blocklist of words or phrases that cause a message to be blocked.

PII masking

- Select PII masking as the capability.
- Optionally target one environment.
- Enter one blocked word or phrase per line.
- Leave the blocklist empty when no additional terms are required.
- Test the policy using fictional data rather than real personal information.

Do not use real personal data for testing

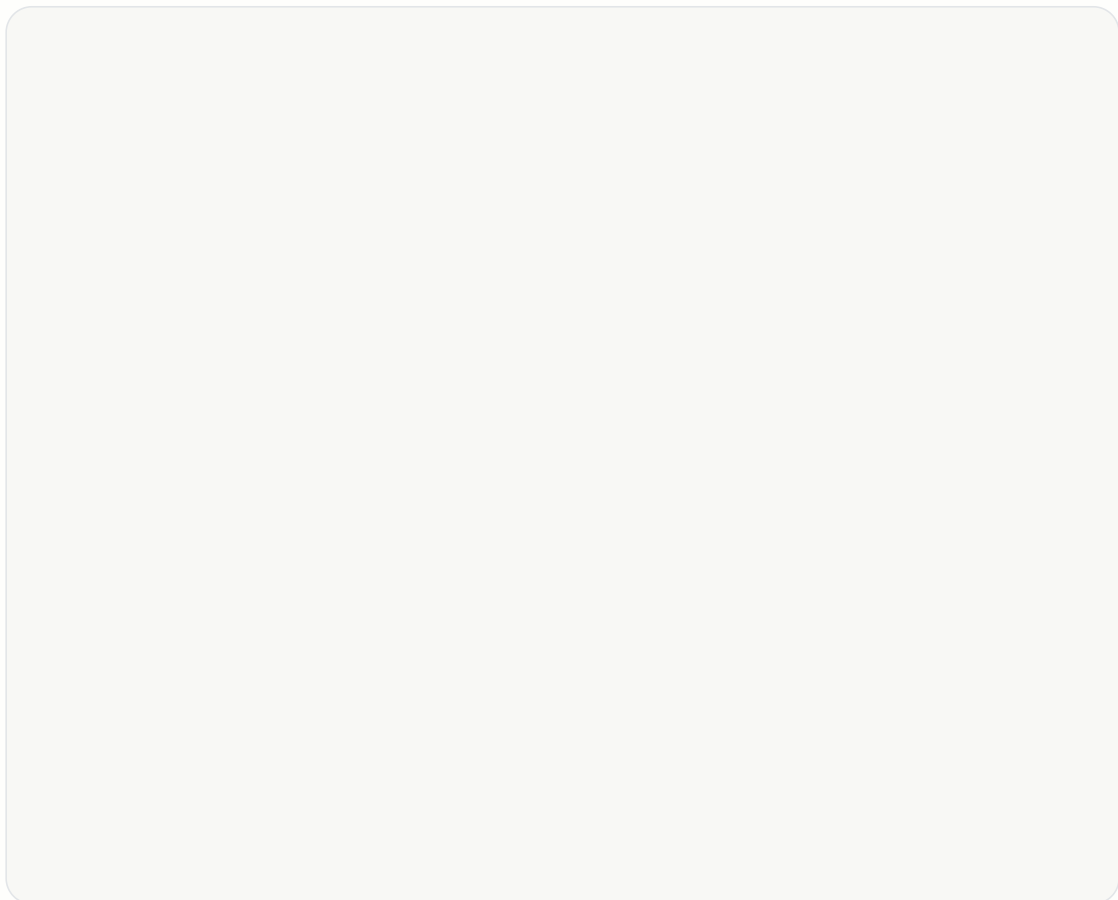
Use fictional names, addresses, account numbers and contact details when checking PII controls. The blocklist is an additional field exposed by this form, not the complete PII-detection configuration.



The prompt-injection guard requires only capability and optional environment selection in the form shown.

Prompt-injection guard

- Select Prompt-injection guard.
- Enter an environment only when the control should be environment-specific.
- Save the policy.
- Confirm availability before enabling enforcement.
- Test with normal user requests as well as representative attempts to override instructions or expose restricted behaviour.



The profanity filter can extend its built-in list with tenant-specific words.

Profanity filter

- The capability includes a built-in list.
- Use Extra words to add tenant-specific terms.
- Enter one word per line.

- Added terms are masked in addition to the built-in list.
- Consider language, regional usage and legitimate business terminology before adding a term.

 Avoid overly broad terms

A word may be inappropriate in one context but legitimate in another. Test additional terms against realistic customer conversations before enforcing the policy.

Allowed keywords define the subjects the assistant may discuss.

Topic and scope guard

- Enter one allowed keyword or topic per line.
- The assistant may discuss content matching the configured topics.
- A longer message matching none of the configured terms may be denied as off-topic.
- Include important synonyms, abbreviations, product names and common customer wording.
- Test both legitimate edge cases and clearly unrelated questions.

 A narrow topic list can block valid requests

Include the different phrases customers genuinely use. Review the list when products, terminology or supported services change.

CAPABILITY	ADMINISTRATOR CONFIGURES	TYPICAL PURPOSE
PII masking	Optional environment and blocklist	Protect sensitive information and block specified terms
Prompt-injection guard	Optional environment	Guard against attempts to manipulate assistant instructions
Profanity filter	Optional environment and extra words	Mask built-in and tenant-specific inappropriate terms
Topic/scope guard	Optional environment and allowed keywords	Keep interactions within approved subjects
Custom	Capability ID, optional environment and raw JSON	Configure an approved capability not represented by a built-in form

Capability names and available fields may evolve. Treat the screenshots as examples of the current interface rather than a permanent inventory.

Add a custom guardrail

Custom guardrails require an approved capability ID and valid raw JSON configuration.

Capability ID

The exact identifier of the approved guardrail capability, for example one supplied by the platform administrator or capability owner.

Environment

Optional environment restriction. Leave blank to apply the policy across environments.

Config (raw JSON)

The capability-specific configuration object. It must be valid JSON and conform to the schema expected by the capability.

- 1 Confirm that the capability is approved and available on the deployment.
- 2 Obtain the exact Capability ID.
- 3 Obtain the supported configuration schema and a safe example.
- 4 Select Custom from the Capability list.
- 5 Enter the Capability ID exactly.
- 6 Add an environment only when required.
- 7 Enter valid JSON in Config.
- 8 Review the JSON for syntax errors.
- 9 Select Save.
- 10 Confirm the saved policy's Availability status.
- 11 Test it in a controlled environment before enforcement.

ⓘ Custom guardrails are advanced configuration

Do not guess a capability ID or configuration schema. An accepted JSON object may still be ineffective if it uses unsupported fields.

ⓘ Do not place secrets in configuration

Do not add API keys, passwords, access tokens, personal data or customer content to the raw JSON field unless a documented capability explicitly requires a secure supported mechanism.

Review active and enforcing policies

Use the table and filters to confirm what is actually applied to the tenant.

- 1 Open Guardrails for the tenant.
- 2 Clear the search field.
- 3 Select the required environment or All environments.
- 4 Select All, Enforce or Monitor.
- 5 Review the Availability status.
- 6 Confirm the expected Mode.
- 7 Confirm that Enabled has the intended value.
- 8 Review the Updated date after making a change.
- 9 Use the row actions available in the current deployment to inspect or change the policy.
- 10 Test the affected tenant interaction after changing enforcement.

 Configured is not the same as enforcing

A policy may exist in the table while being unavailable, disabled or configured in Monitor mode. Review all three states before assuming the policy actively blocks or changes an interaction.

Understand the violations indicator

- The summary card reports violations during the previous seven days when data is available.
- Use the indicator to identify whether a policy may need further review.
- A sudden increase may indicate a real threat, an overly broad configuration or a change in user behaviour.
- Compare violation patterns with recent policy or environment changes.

Export policies

Exports support governance review, audit handover and comparison of the tenant's policy configuration.

- 1 Open the correct tenant.
- 2 Select Guardrails.
- 3 Review the policies and environment filters.
- 4 Select Export policies.
- 5 Save the downloaded export in an approved customer or partner location.
- 6 Record the tenant and export date when the file will be used for governance review.

 Export only

The interface provides policy export. Do not assume an exported file can be imported, restored or applied to another tenant unless that workflow is available in the deployment you are using.

Recommended guardrail rollout

A cautious sequence that reduces false positives and gives the customer confidence in the result.

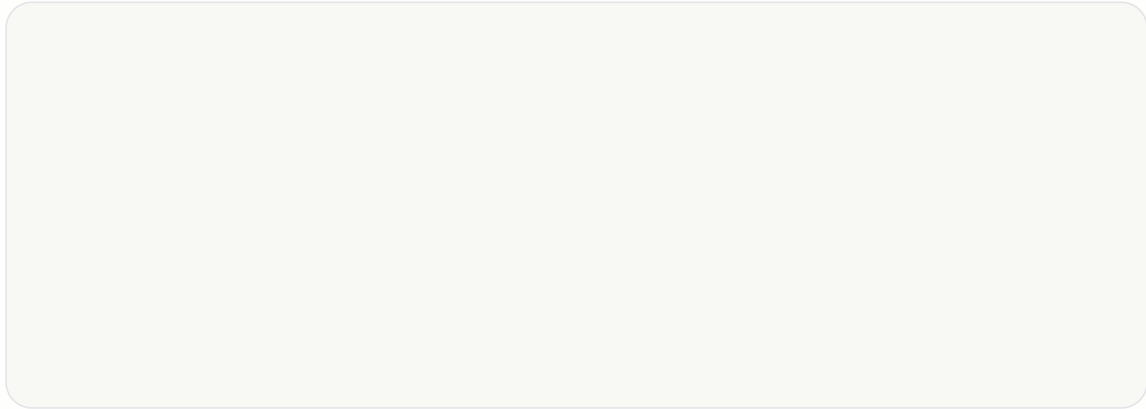
- 1 Agree the customer's governance objective.
- 2 Select the smallest relevant capability.
- 3 Target a non-production environment first where one is available.
- 4 Configure only the required words, phrases or topics.
- 5 Save the policy.
- 6 Confirm capability availability.
- 7 Enable Monitor mode where supported.
- 8 Test acceptable, borderline and unacceptable inputs.
- 9 Refine the configuration to reduce false positives.
- 10 Enable enforcement when the customer approves the behaviour.
- 11 Review the seven-day violation indicator.

① **Test what should pass as well as what should fail**

A guardrail is not ready merely because it blocks an unsafe test. Confirm that ordinary customer interactions still work correctly.

Troubleshoot unavailable guardrails

A forbidden or unavailable state means the policy data could not be retrieved, not that the tenant has no guardrails.



A forbidden or unavailable status indicates an access, platform configuration or loading problem—not an empty guardrail configuration.

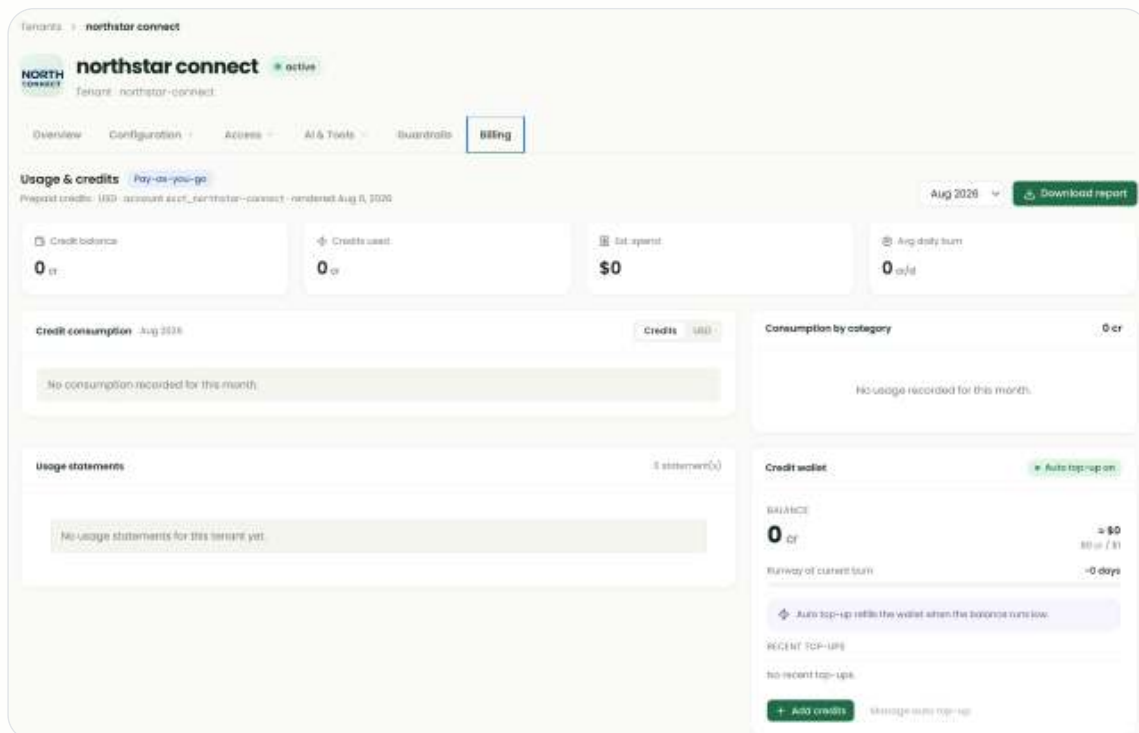
Troubleshooting example only. This screenshot represents a permissions or loading error, not a working guardrail configuration.

- 1 Confirm that the administrator opened the intended tenant.
- 2 Confirm that the account has partnership administrator access.
- 3 Refresh the Guardrails page.
- 4 Return to the tenant overview and reopen Guardrails.
- 5 Check whether other tenant administration pages load normally.
- 6 Do not add or change policies while the current policy state cannot be retrieved.
- 7 Contact the Greentec platform administrator when the forbidden or unavailable state persists, including the tenant identifier, time of the error and a screenshot without sensitive data.

Troubleshooting at a glance

PROBLEM	LIKELY CAUSE	ACTION
The page shows Forbidden or Status unavailable	The administrator lacks access, the service is unavailable or the tenant data could not be loaded	Confirm tenant permissions, refresh and contact the platform administrator if it persists
The form says availability not checked	The selected capability has not yet had its availability confirmed	Save only when appropriate, then review the Availability column
A saved policy is not enforcing	It is disabled, unavailable, in Monitor mode or does not match the current environment	Review Availability, Mode, Enabled and Environment
No policies appear in the table	Search, environment or mode filters exclude them	Clear the search field and reset all filters
A legitimate request is blocked as off-topic	The allowed-keyword list is too narrow	Add relevant synonyms, abbreviations and common customer phrasing
A prohibited term is not detected	The term is absent, entered differently or the policy is not applied to the environment	Review the configuration and test the exact target environment
A custom policy cannot be saved	The JSON is invalid or the capability ID or schema is unsupported	Validate the JSON and confirm the capability documentation
The violation card shows a dash	Violation data or guardrail status is not available in the displayed state	Confirm policy availability and page status before interpreting the result
A policy creates too many violations	The rules are too broad or the policy was enforced without sufficient testing	Return to Monitor where supported, refine the configuration and retest

[← Back to Admin Guides](#)



Usage and credits show balance, consumption, estimated spend and wallet configuration.

Guides in this section

Each guide below covers one task. Detailed step-by-step content is being published progressively.

Understand credits and usage

How prepaid credits and metered consumption work.

COMING SOON

Review credit balance

Check the credits currently available to the tenant.

COMING SOON

Review credits used

See the credits consumed in the selected period.

COMING SOON

Understand estimated spend

Read the estimated cost shown for the period.

COMING SOON

Monitor daily burn

Track average daily consumption and runway.

COMING SOON

Review consumption by category

See where credits are being consumed.

COMING SOON

Download a usage report

Export usage for the selected month.

COMING SOON

Review usage statements

Access statements issued for the tenant.

COMING SOON

Add credits

Fund the tenant credit wallet.

COMING SOON

Configure auto top-up

Refill the wallet automatically when the balance runs low.

COMING SOON

[← Back to Admin Guides](#)

Resolved from the most specific level

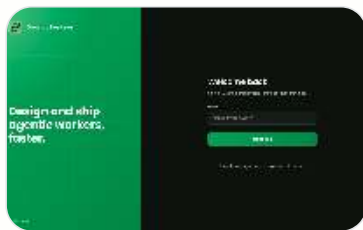
Branding is resolved from the most specific level available. A tenant can override selected fields while continuing to inherit the remaining values from its partnership or the Greentic platform.

Platform branding — default Greentic identity
↓
Partnership branding — default identity for member tenants
↓
Tenant branding — customer-specific overrides

📘 Greentic resolves branding field by field. For example, a tenant can use its own logo and primary colour while continuing to inherit the partnership font and interface skin.

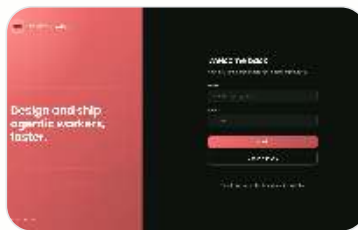
Example

ACME Consulting partnership
├─ ACME Consulting tenant — inherits ACME branding
└─ Northstar Connect — overrides the logo, title and primary colour



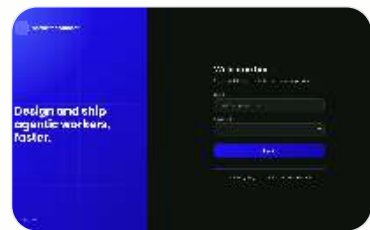
Greentic platform

The default identity used when no partnership or tenant override exists.



Partner identity

A partnership can provide its own branded Designer experience to member tenants.



Tenant identity

An individual tenant can override the partnership branding with its own identity.

Related guides



Brand a partnership

Create the default visual identity inherited by member tenants.



Brand an individual tenant

Give one customer environment its own identity without changing the partnership default.



Logos, colours and typography

Understand the app title, logo, primary colour, accent colour, logo background, skin and font settings.

← Back to Branding

Set the default identity for member tenants

Partnership branding becomes the default identity for every member tenant that does not define its own override.

The screenshot shows the 'Branding' tab for 'ACME Consulting'. The interface includes a navigation bar with 'Member tenants', 'Admins', 'Branding' (highlighted), 'Templates', 'Settings', and 'Domain'. The main content area has a text input for the app title, a logo upload section with 'Replace', 'Remove', and 'Inherit' options, and color selection for 'Primary color' (#19aeb6), 'Accent color' (#19aeb6), and 'Logo background' (#19aeb6). There are also dropdowns for 'Skin' (set to 'SAPPHIRE') and 'Font family' (set to 'poppins'). A preview section on the right shows 'WHAT MEMBER TENANTS SEE BY DEFAULT' with a sample card.

- 1 Open Partnerships.
- 2 Select the partnership.
- 3 Open the Branding tab.
- 4 Enter the app title.
- 5 Upload the partnership logo.
- 6 Configure the primary, accent and logo-background colours.
- 7 Select the interface skin and font family.
- 8 Review the preview.
- 9 Select Save.

Any field left inherited continues to follow the Greentic platform default. Member tenants may later override individual values.

Related guides



How branding inheritance works

Understand how platform, partnership and tenant branding are resolved.



Brand an individual tenant

Give one customer environment its own identity without changing the partnership default.



Logos, colours and typography

Understand the app title, logo, primary colour, accent colour, logo background, skin and font settings.

[← Back to Branding](#)

Override the partnership default for one customer

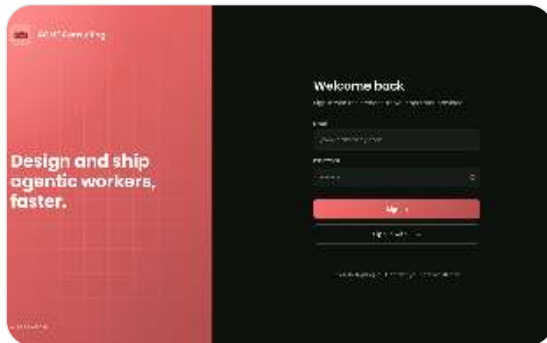
A tenant can define its own identity without changing the partnership default. Only the fields you replace change; everything else keeps following the partnership or platform value.

- 1 Open the partnership and select Member tenants.
- 2 Select the tenant you want to brand.
- 3 Open the Branding tab.
- 4 Replace the fields the tenant should own, such as the app title, logo or primary colour.
- 5 Leave every other field inherited.
- 6 Review the preview.
- 7 Select Save.

Important

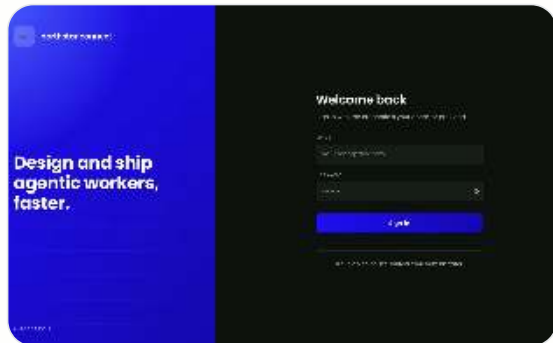
Tenant overrides affect only that tenant. Other member tenants of the same partnership continue to render the partnership identity.

Example



Inherits the partnership identity

ACME Consulting tenant renders the partnership branding.



Overrides the partnership identity

Northstar Connect replaces the logo, title and primary colour.

Related guides



How branding inheritance works

Understand how platform, partnership and tenant branding are resolved.



Brand a partnership

Create the default visual identity inherited by member tenants.



Logos, colours and typography

Understand the app title, logo, primary colour, accent colour, logo background, skin and font settings.

[← Back to Branding](#)

What each setting controls

App title

The name displayed beside the logo and throughout the branded Designer experience.

Logo

The organisation or product identity displayed on the sign-in page and in supported Designer areas.

Primary colour

The main brand colour used for prominent branded surfaces, primary actions and key interface highlights.

Accent colour

A supporting colour used for lighter highlights and complementary interface states.

Logo background

The colour placed behind a logo when additional contrast is required.

Skin

Controls whether supported interface areas use a light or dark visual treatment.

Font family

Controls the typeface used throughout supported branded areas.

Where you configure them

Partnerships / ACME Consulting

ACME Consulting active

Overview Member tenants Admins **Branding** Templates Settings Domain

Branding

Every member tenant with no branding of its own renders what you set here. A field left inherit will keep following the platform default.

IDENTITY

App title
Oreatic Admin

Logo
 Replace
Inherited from platform
Reset to inherit Clear — show no logo

COLORS

Primary color
 #fba8d1  Reset to inherit

Accent color
 #ff9a8d  Reset to inherit

Logo background
 #fba8d1  Reset to inherit

TYPOGRAPHY

Skin
light

Font family
poppins

WHAT MEMBER TENANTS SEE BY DEFAULT

 Oreatic Admin

Sample card

This is how a worker's Designer chrome looks with the current branding.

 Primary action

Save

Branding tab

App title, logo, colours, skin, font family and the live preview of what member tenants see by default.

Related guides



How branding inheritance works

Understand how platform, partnership and tenant branding are resolved.



Brand a partnership

Create the default visual identity inherited by member tenants.



Brand an individual tenant

Give one customer environment its own identity without changing the partnership default.

[← Back to Branding](#)

Inherit, replace or clear a value

Branding settings can be inherited from a parent, replaced at the current level or explicitly cleared.

ACTION	RESULT
Replace	Configure and use a new value at the current level.
Reset to inherit	Remove the local override and use the value from the parent partnership or platform.
Show no logo	Explicitly display no logo, even when the parent has one.

 **Important**
Reset to inherit does not leave the value blank. It restores the value configured at the parent level.

Example

ACME Consulting has a partnership logo. For Northstar Connect:

- Replace displays the Northstar logo.
- Reset to inherit displays the ACME logo.
- Show no logo displays no logo.

Related guides

 **How branding inheritance works**
Understand how platform, partnership and tenant branding are resolved.

 **Brand a partnership**
Create the default visual identity inherited by member tenants.

 **Brand an individual tenant**
Give one customer environment its own identity without changing the partnership default.

[← Back to Branding](#)

Preview before you save

Check how the app title, logo, colours, typography and actions work together before applying the branding to users.

✓ The logo is clear and not cropped.

✓ The app title remains readable at smaller screen sizes.

✓ Text has sufficient contrast against the primary colour.

✓ Primary actions remain easy to identify.

✓ The selected skin works with the logo.

✓ Inherited values come from the expected parent.

✓ Tenant overrides affect only the intended tenant.

✓ The sign-in experience works on desktop and mobile.

Preview in the Branding tab

Partnerships / ACME Consulting

ACME Consulting active

Overview Member tenants Admins **Branding** Templates Settings Domain

Branding

Every member tenant with no branding of its own renders what you set here. A field left interface keeps following the platform default.

IDENTITY

App title
Oreantic Admin

Logo
 Replace
Remove
Inherited from platform
Reset to inherit Clear — show no logo

COLORS

Primary color  #f68a8f 
Reset to inherit

Accent color  #f6a086 
Reset to inherit

Logo background  #f68a8f 
Reset to inherit

TYPOGRAPHY

Skin  light

Font family  poppins

WHAT MEMBER TENANTS SEE BY DEFAULT

 Oreantic Admin

Sample card

This is how a worker's Designer chrome looks with the current branding.

 Primary action

Save

What member tenants see by default

The preview panel shows the branded header and a sample card with the primary action.

Related guides



How branding inheritance works
Understand how platform, partnership and tenant branding are resolved.



Brand a partnership
Create the default visual identity inherited by member tenants.



Brand an individual tenant
Give one customer environment its own identity without changing the partnership default.

[← Back to Branding](#)

Branding controls appearance. Domains control access.

Branding defines the visual identity. A custom domain defines the URL through which users reach it.

Branding controls

- Logo
- App title
- Colours
- Skin
- Typography

Custom domains control

- The URL users visit
- DNS configuration
- Routing
- Domain verification

Example — Branding: Northstar Connect logo and colours. **Domain:** designer.northstarconnect.com

[Explore custom domain guides →](#)

Related guides



How branding inheritance works

Understand how platform, partnership and tenant branding are resolved.



Brand a partnership

Create the default visual identity inherited by member tenants.



Brand an individual tenant

Give one customer environment its own identity without changing the partnership default.

[← Back to Branding](#)

Branding checklist

Review the logo, contrast, inheritance and responsive experience before launch.

✓ The logo is clear and not cropped.

✓ The app title remains readable at smaller screen sizes.

✓ Text has sufficient contrast against the primary colour.

✓ Primary actions remain easy to identify.

✓ The selected skin works with the logo.

✓ Inherited values come from the expected parent.

✓ Tenant overrides affect only the intended tenant.

✓ The sign-in experience works on desktop and mobile.

Related guides



How branding inheritance works

Understand how platform, partnership and tenant branding are resolved.



Brand a partnership

Create the default visual identity inherited by member tenants.



Brand an individual tenant

Give one customer environment its own identity without changing the partnership default.

[← Back to Branding](#)

Common branding issues

The logo does not appear.

Check whether the value is set to show no logo at the current level. Reset to inherit restores the parent logo.

The wrong logo appears for one customer.

The tenant is inheriting the partnership logo. Replace the logo on that tenant to give it its own identity.

Colours look different from what was configured.

A more specific level is overriding the value. Check the tenant branding before the partnership branding.

Text is hard to read on the primary colour.

Choose a primary colour with stronger contrast, or use the logo background colour to separate the logo from the surface.

The sign-in page still shows the previous branding.

Confirm the changes were saved and reload the sign-in page.

ACTION	RESULT
Replace	Configure and use a new value at the current level.
Reset to inherit	Remove the local override and use the value from the parent partnership or platform.
Show no logo	Explicitly display no logo, even when the parent has one.

Related guides



How branding inheritance works

Understand how platform, partnership and tenant branding are resolved.



Brand a partnership

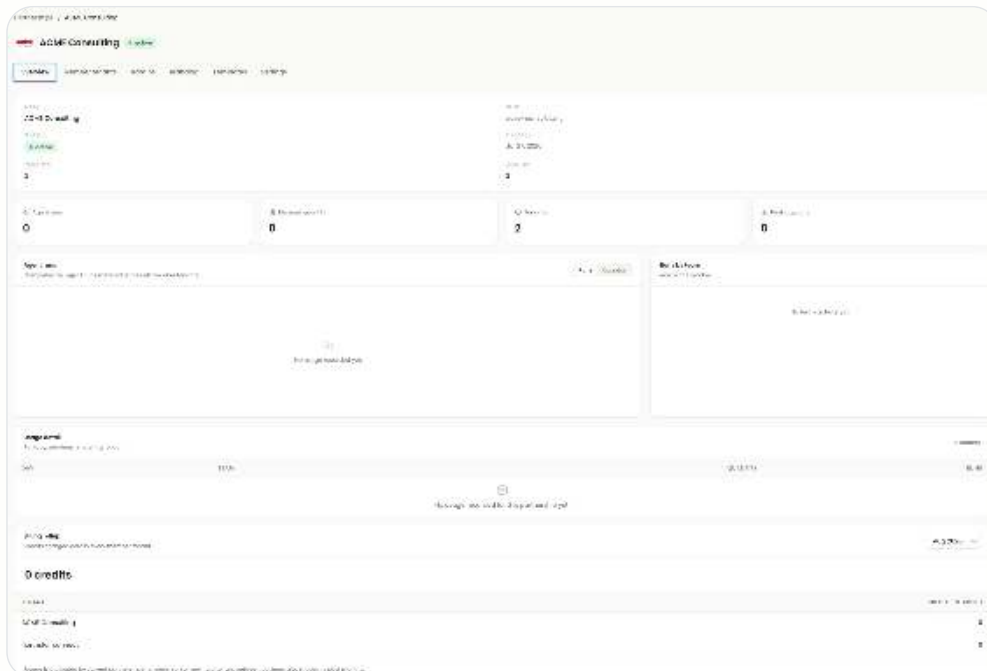
Create the default visual identity inherited by member tenants.



Brand an individual tenant

Give one customer environment its own identity without changing the partnership default.

[← Back to Branding](#)



Partnership Overview: identity, activity, usage detail and billing roll-up.

Partnership summary

The top of the Overview tab confirms who the partnership is and how large it currently is.

Partnership name The name of your organisation in Greentic.	Slug The stable identifier used for the partnership.
Active status Whether the partnership is currently active.	Creation date When the partnership was created.
Member tenants The number of tenants connected to the partnership.	Administrators The number of partnership administrators.

Usage and activity

The remainder of the tab aggregates activity across member tenants.

Agent runs Completed digital-worker or agent activity metered across member tenants.	Metered quantity The usage quantity recorded across the partnership.
Tenants The current number of member tenants.	Peak day runs The highest recorded run volume during the selected reporting period.
Agent runs chart Shows aggregate partnership activity over time.	Runs by team Shows activity grouped by team where available.
Usage detail	Billing roll-up

Provides daily and per-team usage information.

Shows credits charged across current member tenants.

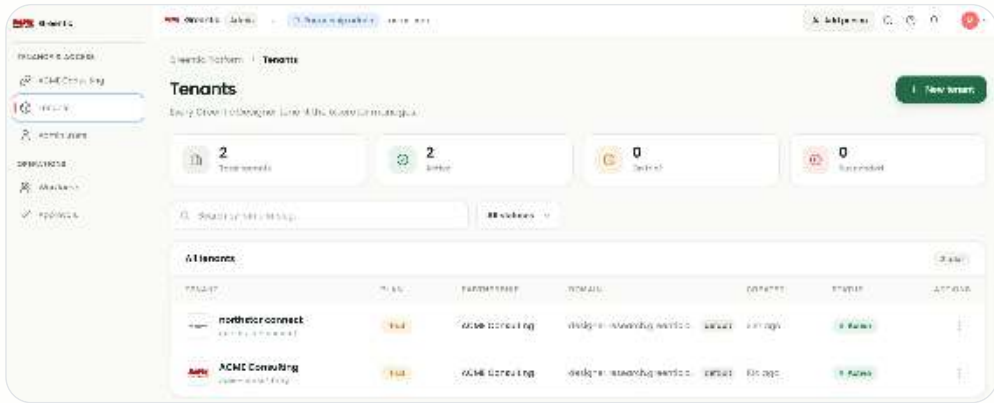
① **Aggregated view**

Usage and billing shown here are aggregated across the partnership's current member tenants. Tenant-level details remain available inside each tenant's own Billing section.

① **Attribution follows membership**

Historical usage is attributed according to current partnership membership. Moving a tenant between partnerships may also move how prior usage is presented.

[← Back to Manage your partnership](#)



The Member tenants tab lists the customer and internal tenants connected to the partnership.

What the list shows

Tenant name The customer-facing name of the tenant.	Tenant slug The stable identifier used in tenant URLs.
Status The current state of the tenant.	Actions The operations available for that tenant row.

Common tasks

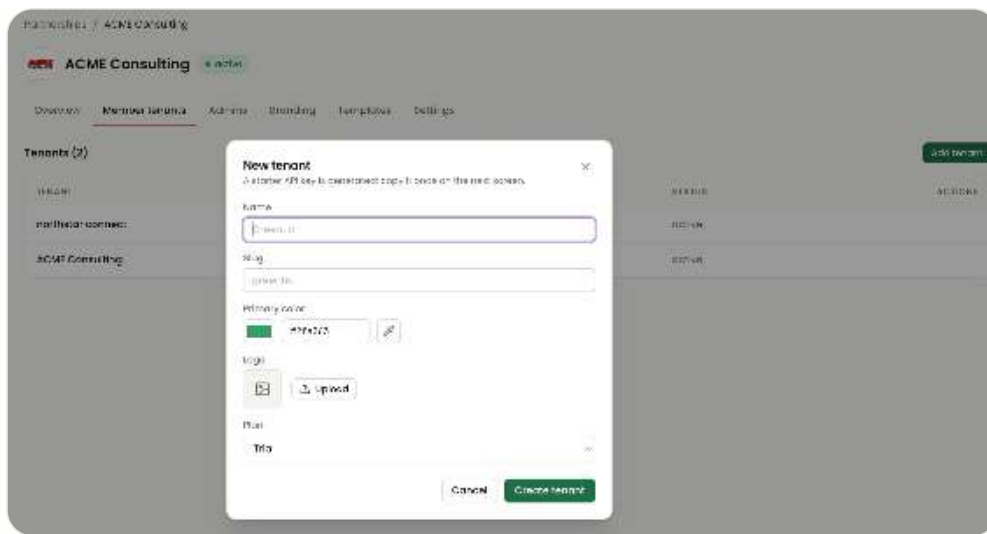
View a tenant Select or open the tenant to manage its configuration, access, AI tools, guardrails and billing.	Create a tenant Use Add tenant to create a new tenant directly inside the partnership.
Remove a tenant Disconnect an existing tenant from the partnership where the action is available.	

Remove is a membership action

Treat Remove as a partnership-membership action. Do not assume it deletes the tenant unless the product confirmation explicitly states that.

Create a new member tenant

Add a customer environment directly from the partnership.



The New tenant dialog opened from Member tenants.

- 1 Open the partnership.
- 2 Select Member tenants.
- 3 Select Add tenant.
- 4 Enter the tenant name.
- 5 Review or edit the generated slug.
- 6 Choose the tenant's primary colour.
- 7 Upload an optional logo.
- 8 Select the initial plan.
- 9 Select Create tenant.
- 10 Copy and securely store the generated starter API key when it appears.

Name

The customer-facing tenant name.

Slug

The stable identifier used in tenant URLs and internal references.

Primary colour

The initial tenant brand colour.

Logo

The initial customer or product identity.

Plan

The commercial or trial plan assigned at creation.

🕒 Protect the starter API key

A starter API key is generated during tenant creation and displayed once. Store it securely. Never place it in documentation, source control or public screenshots.

[Continue to Create and manage tenants →](#)

[← Back to Manage your partnership](#)



The Admins tab lists the people who can administer the partnership.



Manage partnership administrators

Control who can administer the partnership, its member tenants and shared resources.

Detailed guidance will be added after the administrator-management interface is documented.

[← Back to Manage your partnership](#)

does so.

Learn how reusable solutions are created in the **Designer Guides**.

[← Back to Manage your partnership](#)



Lock branding for member tenants and copy branding from an existing tenant.

Lock branding for member tenants

Prevents member tenants from overriding fields on their own Branding tab. This does not change the partnership's own branding.

The partner must enforce one consistent white-labelled identity.

Customer tenants should inherit the partnership brand.

Local tenant branding changes need to be prevented.

Locking restricts tenant autonomy

Enabling this setting restricts member-tenant branding autonomy. Confirm the intended commercial and customer experience before switching it on.

Copy from a member tenant

Seeds the partnership branding from the appearance currently rendered by a selected member tenant. It replaces every field currently configured on the partnership Branding tab.

- 1 Open Partnership Settings.
- 2 Select a member tenant.
- 3 Select Copy.
- 4 Review the resulting values on the Partnership Branding tab.
- 5 Save or adjust the branding as required.

Copying replaces existing branding

Copying from a member tenant replaces the branding fields currently configured for the partnership. Review the selected tenant carefully before confirming the action.

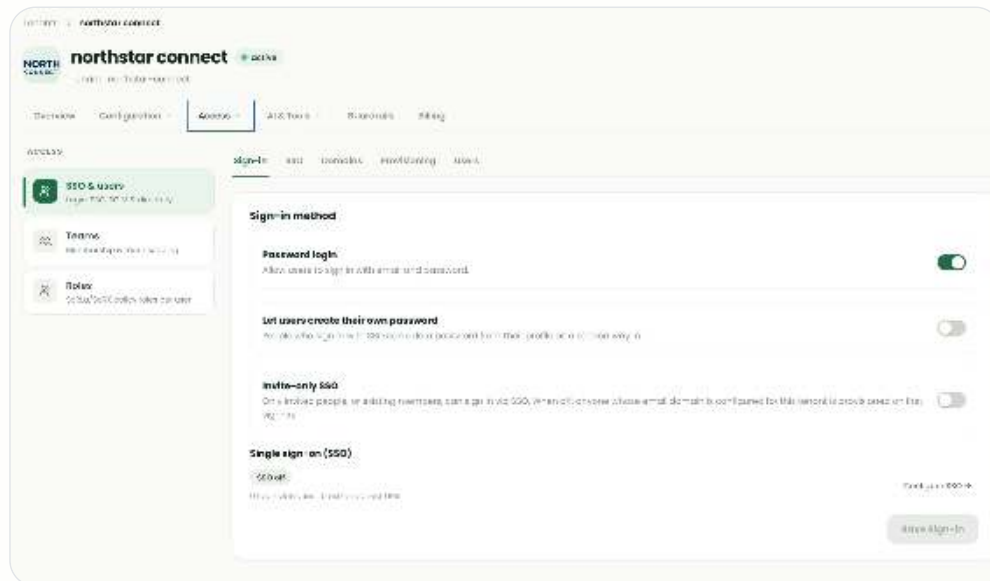
Quick reference

TASK	LOCATION
Review partnership usage	Overview
Create a customer tenant	Member tenants → Add tenant
Manage partnership administrators	Admins
Set default branding	Branding
Share reusable solutions	Templates
Lock tenant branding	Settings
Copy branding from a tenant	Settings

Understand **branding inheritance**.

[← Back to Manage your partnership](#)

Scope: individual tenant



The Sign-in tab controls password login and SSO entry rules for the tenant.

Sign-in options

A tenant can use local password accounts, single sign-on or a combination allowed by its configuration.

Password login

Users sign in using an email address and password stored for the tenant.

Let users create their own password

People who sign in with SSO can add a password from their profile as a second way in.

Invite-only SSO

Restricts SSO sign-in to invited people or existing members of the tenant.

Configure the sign-in method

- 1 Open the tenant.
- 2 Select Access → SSO & users.
- 3 Open the Sign-in tab.
- 4 Enable or disable password login.
- 5 Decide whether SSO users may create their own password.
- 6 Decide whether SSO access is invite-only.
- 7 Select Save Sign-in.

🕒 Recommendation

Use local password accounts for initial testing or a small controlled user group. For customer production environments, configure the organisation's preferred single sign-on method where available.

Related guides



Configure single sign-on



Configure email domains

Use Greentec-managed SSO or connect an external OpenID Connect identity provider.

🕒 5 min read

Route users from recognised company domains to the tenant's SSO configuration.

🕒 4 min read



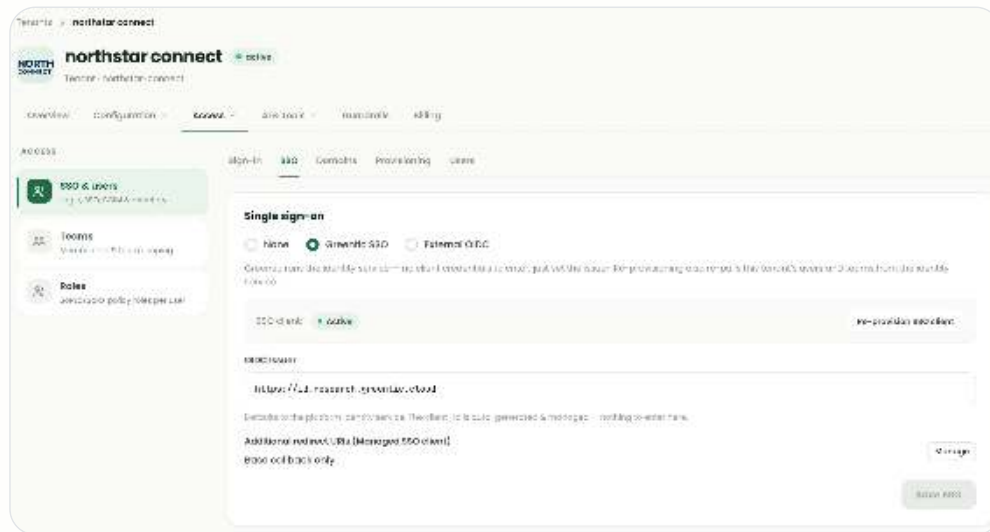
Add and manage users

Create local tenant users and review identities provisioned through the identity service.

🕒 4 min read

[← Back to Access and sign-in](#)

Scope: individual tenant



Greentic SSO with the managed SSO client in the Active state.

Identity service options

The SSO tab determines which identity service the tenant uses.

None

The tenant does not use SSO.

Greentic SSO

Greentic manages the OIDC client. The administrator selects the identity service and activates or re-provisions the tenant client.

External OIDC

The customer supplies and manages its own OpenID Connect configuration.

Configure Greentic SSO

- 1 Open the tenant.
- 2 Select Access.
- 3 Open SSO & users.
- 4 Select the SSO tab.
- 5 Choose Greentic SSO.
- 6 Confirm the OIDC issuer.
- 7 Save the SSO configuration.
- 8 Provision or re-provision the SSO client when required.
- 9 Confirm that the SSO client status is Active.

⌚ Do not treat SSO as ready too early

SSO is not usable until the SSO client shows an Active status.

- ⌚ Re-provisioning refreshes the managed client and may also re-pull the tenant's users and teams from the identity service.

Related guides



Choose a sign-in method

Enable local password login or prepare the tenant for single sign-on.

🕒 4 min read



Configure email domains

Route users from recognised company domains to the tenant's SSO configuration.

🕒 4 min read



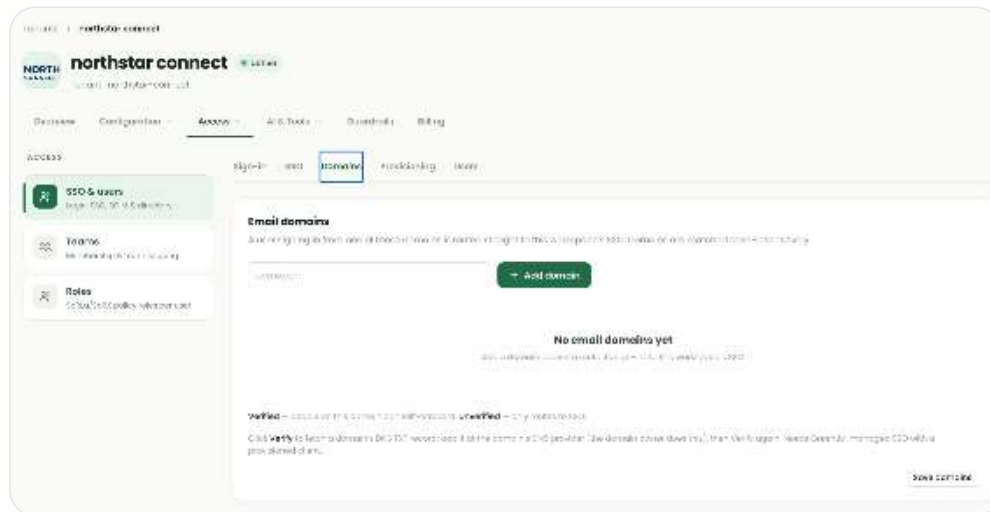
Add and manage users

Create local tenant users and review identities provisioned through the identity service.

🕒 4 min read

[← Back to Access and sign-in](#)

Scope: individual tenant



Email domains route recognised company addresses to the tenant's SSO.

Verified and unverified domains

Email domains associate company email addresses with the tenant's SSO configuration.

Unverified domain

Users from the domain can be routed to SSO, but domain ownership has not been confirmed.

Verified domain

The required DNS record has been published and confirmed. Depending on the tenant configuration, users from the domain may self-onboard.

Add and verify a domain

- 1 Configure and activate SSO first.
- 2 Open Access → SSO & users → Domains.
- 3 Enter the customer's email domain, such as acme.com.
- 4 Select Add domain.
- 5 Save the domain list.
- 6 Start domain verification.
- 7 Copy the generated DNS TXT record.
- 8 Ask the customer's domain administrator to publish it.
- 9 Verify the domain again after DNS propagation.

ⓘ Email domains are not web domains

Email domains are used for identity routing. They are not the same as the custom web domain used to access the branded Designer. See [branding and custom domains](#).

Related guides



Choose a sign-in method

Enable local password login or prepare the tenant for single sign-on.

⌚ 4 min read



Configure single sign-on

Use Greentix-managed SSO or connect an external OpenID Connect identity provider.

⌚ 5 min read



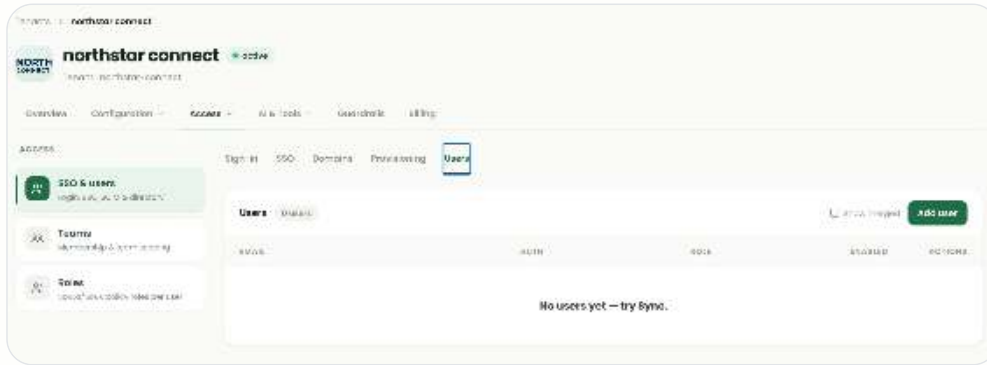
Add and manage users

Create local tenant users and review identities provisioned through the identity service.

🕒 4 min read

[← Back to Access and sign-in](#)

Scope: individual tenant



The Users tab lists the identities available within the tenant.

Create a local user

Local users can be created directly when password login is enabled, while SSO or provisioned users may arrive through the configured identity service.

- 1 Open Access → SSO & users → Users.
- 2 Select Add user.
- 3 Enter the user's email address.
- 4 Optionally enter a display name.
- 5 Select the initial role available in the form.
- 6 Create a secure password that meets the displayed requirements.
- 7 Select Create user.

The 'Add user' dialog box is shown, titled 'Add user' with a close button. It contains the instruction 'Create a local password user in this tenant.' and several input fields: 'Email' (with 'user@company.com' entered), 'Display name (optional)', 'Role' (a dropdown menu with 'member' selected), and 'Password' (with a strength indicator 'At least 8 chars, a letter and a digit'). At the bottom are 'Cancel' and 'Create user' buttons.

The Add user dialog creates a local password account.

① Prefer centrally managed identity

Only create local password users when they are required by the tenant's chosen sign-in model. Never share credentials or record passwords in documentation.

① Show merged

When supported by the tenant configuration, merged results can help display identities collected from multiple identity or provisioning sources.

Related guides



Choose a sign-in method

Enable local password login or prepare the tenant for single sign-on.

🕒 4 min read



Configure single sign-on

Use Greentic-managed SSO or connect an external OpenID Connect identity provider.

🕒 5 min read



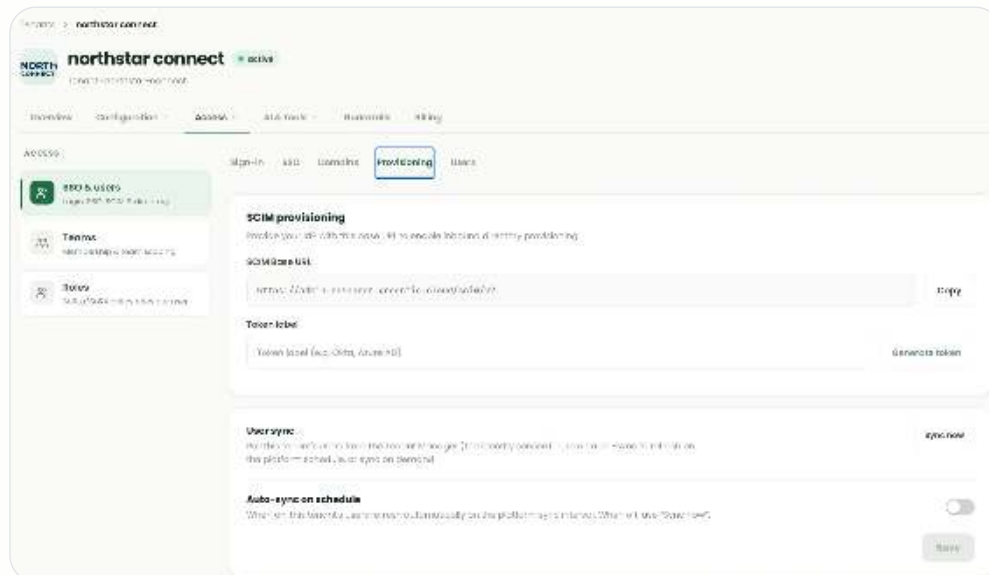
Configure email domains

Route users from recognised company domains to the tenant's SSO configuration.

🕒 4 min read

[← Back to Access and sign-in](#)

Scope: individual tenant



Provisioning exposes the SCIM base URL, token generation and user sync.

What provisioning covers

SCIM provisioning enables a customer identity provider, such as Microsoft Entra ID or Okta, to create and update users in the tenant directory.

Inbound SCIM provisioning

Use the SCIM base URL and a generated token to connect the customer's identity provider.

User synchronisation

Pull tenant users from the connected identity service manually or on the platform schedule.

Connect an identity provider

- 1 Open Access → SSO & users → Provisioning.
- 2 Copy the SCIM base URL.
- 3 Enter a descriptive token label, such as "Customer Entra ID".
- 4 Generate the provisioning token.
- 5 Copy and store the token securely when it is shown.
- 6 Configure the customer identity provider using the SCIM URL and token.
- 7 Use Sync now to test user synchronisation.
- 8 Enable scheduled auto-sync where appropriate.

ⓘ Treat SCIM tokens as secrets

Do not place them in documentation, screenshots, source control or unsecured messages.

Related guides



Choose a sign-in method

Enable local password login or prepare the tenant for single sign-on.

🕒 4 min read



Configure single sign-on

Use Greentec-managed SSO or connect an external OpenID Connect identity provider.

🕒 5 min read



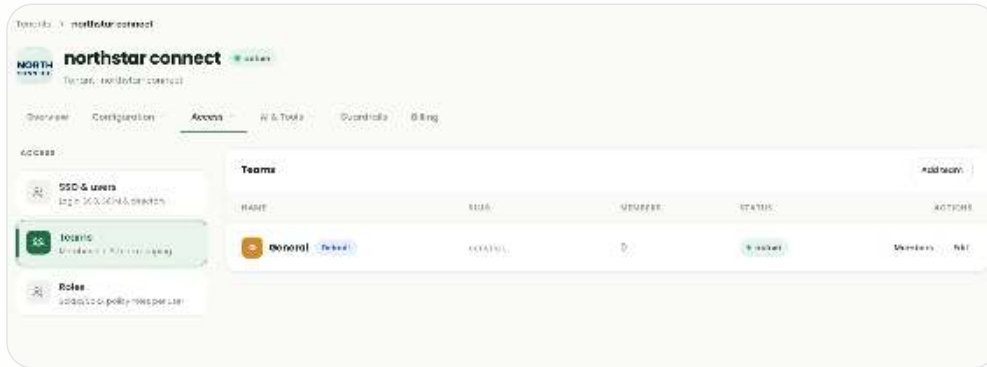
Configure email domains

Route users from recognised company domains to the tenant's SSO configuration.

🕒 4 min read

[← Back to Access and sign-in](#)

Scope: individual tenant



Teams group tenant users for membership and solution-level scoping.

Create a team

Every tenant may include a default General team, and additional teams can be created for business units, projects or customer groups.

- 1 Open Access → Teams.
- 2 Select Add team.
- 3 Enter a stable slug.
- 4 Enter the user-facing team name.
- 5 Select Save.
- 6 Open Members for the team.
- 7 Add the relevant tenant users.

Add team asks for a slug and a display name.

- 🕒 Use concise, stable slugs because they may be referenced by policies or integrations. Use clear display names that users and administrators will recognise.

Example team structure

General

Default tenant membership.

Customer Service

Users responsible for customer support solutions.

Operations

Users responsible for operational workflows.

These are examples only. Apart from a default team, teams are not created automatically.

Related guides



Choose a sign-in method

Enable local password login or prepare the tenant for single sign-on.

🕒 4 min read



Configure single sign-on

Use Greentic-managed SSO or connect an external OpenID Connect identity provider.

🕒 5 min read



Configure email domains

Route users from recognised company domains to the tenant's SSO configuration.

🕒 4 min read

[← Back to Access and sign-in](#)

Scope: individual tenant



Roles are assigned per user, per capability.

Capability roles

Roles determine which Designer surfaces and capabilities each tenant user can access.

Agentic Worker

Access to agentic worker capabilities.

Flow Editor

Access to deterministic flow-design functionality.

SoRLa

Access to supported SoRLa composition capabilities.

OperaLa

Access to supported OperaLa composition capabilities.

Telco-X Playbook

Access to the Telco-X Playbook Composer where enabled.

Assign roles

- 1 Open Access → Roles.
- 2 Find the user by name or email.
- 3 Select the capabilities the user requires.
- 4 Remove access that is not needed.
- 5 Confirm that the role changes have been saved or applied.

Grant least privilege

Grant only the capabilities required for the user's responsibilities. Review role assignments when users change teams, projects or responsibilities.

Related guides

Choose a sign-in method

Enable local password login or prepare the tenant for single sign-on.

4 min read

Configure single sign-on

Use Greentix-managed SSO or connect an external OpenID Connect identity provider.

5 min read

Configure email domains

Route users from recognised company domains to the tenant's SSO configuration.

🕒 4 min read

[← Back to Access and sign-in](#)

Scope: individual tenant

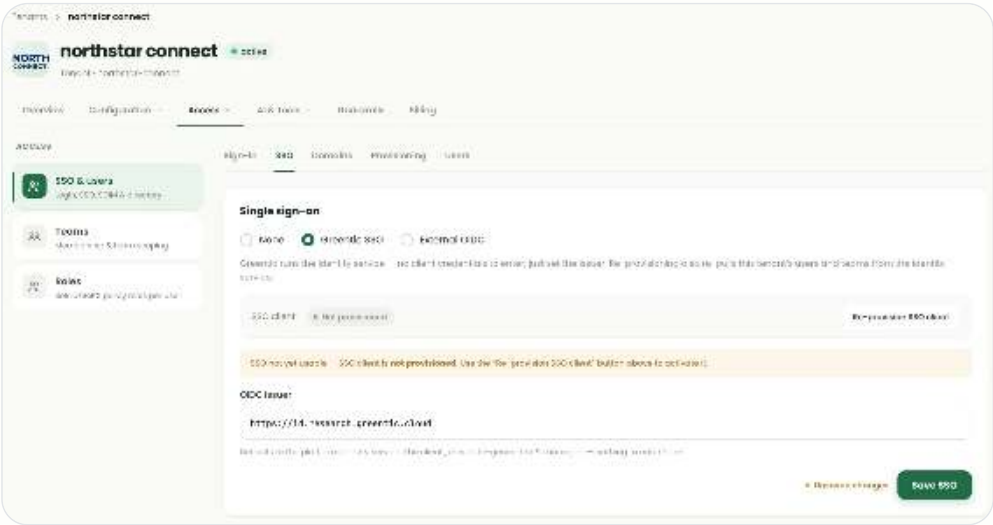
Common access problems

Work through the most likely cause before changing the tenant's identity configuration.

PROBLEM	LIKELY CAUSE	ACTION
SSO client is not provisioned	Greentic SSO was selected but the managed client has not been activated.	Save the SSO configuration and provision or re-provision the client.
The domain page says Awaiting SSO	An email domain was added before SSO became active.	Configure and activate SSO, then return to the Domains tab.
Users do not appear	Provisioning has not run, sync is disabled or the identity provider is not connected.	Review the SCIM configuration and use Sync now.
A user can sign in but cannot use a Designer capability	The required capability role has not been assigned.	Open Roles and grant the minimum required capability.
A user appears in the tenant but not in the expected team	Identity provisioning and team membership are separate.	Open Teams and review the team's Members list.

SSO client is not provisioned

Greentic SSO has been selected but the managed client has not been activated, so sign-in through SSO will not work.

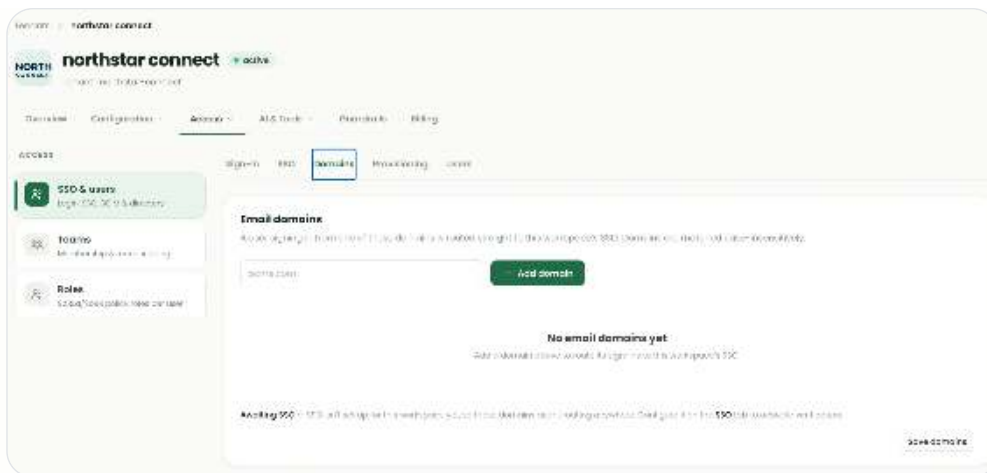


Troubleshooting example only — the SSO client is not provisioned.

- 1 Open Access → SSO & users → SSO.
- 2 Confirm that Greentic SSO is selected.
- 3 Save the SSO configuration.
- 4 Select Re-provision SSO client.
- 5 Confirm that the SSO client status becomes Active.

The Domains tab says Awaiting SSO

An email domain was added before SSO became active, so the domain is not routing anywhere yet.



Troubleshooting example only — domains configured before SSO is ready.

- 1 Configure and activate SSO for the tenant.
- 2 Return to Access → SSO & users → Domains.
- 3 Confirm that the Awaiting SSO notice has cleared.
- 4 Start domain verification.

Always test with a normal user account

An administrator's existing session may hide routing, permissions or onboarding problems.

Related guides



Choose a sign-in method

Enable local password login or prepare the tenant for single sign-on.

🕒 4 min read



Configure single sign-on

Use Greentric-managed SSO or connect an external OpenID Connect identity provider.

🕒 5 min read



Configure email domains

Route users from recognised company domains to the tenant's SSO configuration.

🕒 4 min read

[← Back to Access and sign-in](#)

USE CASES

A practical library of business problems Greentic can solve.

Greentic use cases are built around real business journeys. The best opportunities are not abstract AI ideas. They are repeatable processes where customers, employees or managers need guidance, information needs to be collected, decisions need context and people need better handovers.



Greentic use cases start with real business pain.

Slow processes, repetitive work, missing information, messy handovers and AI experiments that have not yet become operational value. This library helps partners spot good first opportunities, shape demos and propose focused proof-of-value projects.

SECTION 1

How to choose a good first use case

A good first use case should be visible, valuable and achievable. It should be easy for the customer to recognise the pain and easy for the partner to demonstrate a better guided journey.



Repeatable

The process happens often enough for improvement to matter.



Painful

Users, staff or managers clearly feel the friction today.



Guided

The journey can be improved by asking the right questions, showing clear choices and explaining the next step.



Controlled

There are clear rules, approval points or escalation moments where the business needs confidence.



Demonstrable

The process can be shown with realistic sample data in a demo or proof of value.



Expandable

The first journey can lead to more opportunities in the same department, industry or customer account.



Avoid starting with the most complex process in the organisation. Start with a journey that customers understand quickly and where success can be shown clearly.

SECTION 2

Horizontal use cases

These use cases apply across many industries and are often good starting points for partners.



1. Customer support automation

BUSINESS PROBLEM

Customers ask repeated questions, provide incomplete information and wait too long for help.

DIGITAL WORKER IDEA

A guided customer service digital worker that identifies the request, asks the right follow-up questions, suggests next steps and escalates with context.

BUSINESS VALUE

Faster support, fewer repetitive questions, better handover to agents and improved customer experience.

PROOF-OF-VALUE IDEA

Use 30–50 common support scenarios and show how the digital worker collects details, guides the customer and prepares escalation.

BEST BUYER

Customer service leaders, contact centre leaders and operations teams.



2. HR onboarding

BUSINESS PROBLEM

New employees and managers ask repeated questions and struggle to follow onboarding steps.

DIGITAL WORKER IDEA

A guided HR onboarding digital worker that answers common questions, explains next steps, collects missing information and supports task completion.

BUSINESS VALUE

Less repetitive HR admin, smoother onboarding and better employee experience.

PROOF-OF-VALUE IDEA

Create a guided journey for a new starter's first week, including policies, documents, equipment, manager tasks and escalation to HR.

BEST BUYER

HR leaders, people operations teams and internal service teams.



3. IT helpdesk triage

BUSINESS PROBLEM

IT tickets are often unclear, misrouted or missing key information.

DIGITAL WORKER IDEA

A guided IT support digital worker that collects diagnostics, understands the issue, suggests basic steps and routes the request with a clear summary.

BUSINESS VALUE

Better ticket quality, faster routing, fewer follow-up questions and improved service desk productivity.

PROOF-OF-VALUE IDEA

Use common IT scenarios such as password problems, laptop issues, access requests, software problems and connectivity issues.

BEST BUYER

IT leaders, service desk managers and operations teams.



4. Invoice approval support

BUSINESS PROBLEM

Invoice approvals are slow because information is spread across emails, systems and documents.

DIGITAL WORKER IDEA

A guided finance digital worker that summarises invoice details, highlights missing information, supports approval decisions and escalates exceptions.

BUSINESS VALUE

Faster approvals, clearer decisions, fewer email chains and better auditability.

PROOF-OF-VALUE IDEA

Use 20–30 sample invoice scenarios covering normal approvals, missing purchase orders, mismatched amounts and exception handling.

BEST BUYER

Finance leaders, shared services teams and operations leaders.



5. Procurement request guidance

BUSINESS PROBLEM

Employees do not always know how to request goods or services, what information is required or who needs to approve.

DIGITAL WORKER IDEA

A guided procurement digital worker that helps users select the right request type, collect required details and route approvals.

BUSINESS VALUE

Clearer requests, fewer procurement delays, better compliance and reduced manual clarification.

PROOF-OF-VALUE IDEA

Demonstrate common request types such as software purchase, supplier onboarding, equipment request and contract renewal.

BEST BUYER

Procurement leaders, operations leaders and finance teams.



6. Sales qualification assistant

BUSINESS PROBLEM

Sales teams lose time qualifying leads, preparing follow-ups and gathering customer context.

DIGITAL WORKER IDEA

A guided sales assistant that captures lead details, suggests next actions, prepares summaries and helps sales teams follow a consistent process.

BUSINESS VALUE

Better lead qualification, more consistent follow-up and less manual preparation.

PROOF-OF-VALUE IDEA

Use sample lead scenarios and show how the digital worker prepares qualification notes and next-step recommendations.

BEST BUYER

Sales leaders, revenue operations teams and account managers.



7. Compliance evidence collection

BUSINESS PROBLEM

Compliance processes often require users to collect evidence, answer questions and escalate exceptions, but the journey is unclear.

DIGITAL WORKER IDEA

A guided compliance digital worker that helps users follow required steps, collect evidence, identify exceptions and escalate when needed.

BUSINESS VALUE

More consistent evidence collection, clearer exceptions and better compliance confidence.

PROOF-OF-VALUE IDEA

Use one compliance journey such as supplier due diligence, policy attestation, risk review or internal control evidence collection.

BEST BUYER

Compliance leaders, risk teams, audit teams and operations leaders.



8. Knowledge and policy assistant

BUSINESS PROBLEM

Employees spend time searching policies, documents and internal knowledge bases, then still need help applying the information.

DIGITAL WORKER IDEA

A guided knowledge assistant that helps users find relevant information, explains it in context and guides them to the next step.

BUSINESS VALUE

Faster answers, fewer repeated questions and better use of internal knowledge.

PROOF-OF-VALUE IDEA

Use a small set of HR, IT, finance or compliance policies and show how the digital worker answers questions and guides next actions.

BEST BUYER

HR, IT, compliance, operations and internal service leaders.

SECTION 3

Industry use cases

Partners can create stronger campaigns by packaging digital worker journeys around the language and pain points of a specific industry.



1. Banking and financial services

COMMON PAIN

Customers and staff need guidance through regulated processes, approvals, documentation and service requests.

DIGITAL WORKER OPPORTUNITIES

- 🕒 Customer service request guidance
- 🕒 Account servicing support
- 🕒 Complaints intake
- 🕒 KYC information collection
- 🕒 Internal policy assistant
- 🕒 Relationship manager support
- 🕒 Risk and compliance evidence collection

PROOF-OF-VALUE IDEA

Start with a guided customer service or internal policy journey where information must be collected consistently and escalated with context.

PARTNER ANGLE

Position Greentic as practical AI with business control for regulated operations.



2. Insurance

COMMON PAIN

Insurance journeys often involve forms, evidence, policy questions, claims updates and handovers between teams.

DIGITAL WORKER OPPORTUNITIES

- 🕒 Claims intake guidance
- 🕒 Policy query support
- 🕒 Broker support

- 🕒 Renewal preparation
- 🗣️ Complaint handling support
- 🔍 Evidence collection
- 👤 Internal underwriting assistant

PROOF-OF-VALUE IDEA

Create a claims intake journey that guides the customer, collects missing details and prepares a structured handover.

PARTNER ANGLE

Focus on faster service, clearer handover and better customer experience.



3. Telecoms

COMMON PAIN

Customers contact support repeatedly for service issues, billing questions, orders, faults and account changes.

DIGITAL WORKER OPPORTUNITIES

- 🕒 Fault triage
- 🗣️ Billing query guidance
- 📄 Order status support
- 📄 Contract change guidance
- 📄 Field service appointment support
- 👤 Customer retention support
- 👤 Internal agent assistant

PROOF-OF-VALUE IDEA

Demonstrate a guided fault triage journey that collects symptoms, checks basic information and escalates with context.

PARTNER ANGLE

Focus on reducing repetitive support work and improving first-contact resolution.



4. Manufacturing

COMMON PAIN

Manufacturing teams deal with maintenance issues, supplier requests, quality checks, approvals and operational handovers.

DIGITAL WORKER OPPORTUNITIES

- 🕒 Maintenance request intake
- 🗣️ Quality issue reporting
- 📄 Supplier onboarding
- 📄 Procurement support
- 📄 Safety incident guidance
- 📄 Shift handover support
- 👤 Operations knowledge assistant

PROOF-OF-VALUE IDEA

Create a guided maintenance or quality issue journey that collects the right information before escalation.

PARTNER ANGLE

Focus on faster operational response, clearer issue reporting and reduced manual coordination.



5. Healthcare

COMMON PAIN

Healthcare organisations manage many information-heavy journeys where clarity, handover and control are critical.

DIGITAL WORKER OPPORTUNITIES

- 🗣️ Patient service guidance
- 📄 Staff onboarding
- 📄 Internal policy assistant
- 📄 Appointment preparation support
- 📄 Referral information collection
- 📄 Incident reporting guidance
- 📄 Administrative request handling

PROOF-OF-VALUE IDEA

Start with an internal administrative or staff guidance journey rather than a clinical decision-making process.

PARTNER ANGLE

Focus on administrative efficiency, staff support and controlled AI adoption.



6. Education

COMMON PAIN

Students, parents and staff ask repeated questions and need guidance through processes, deadlines and support requests.

DIGITAL WORKER OPPORTUNITIES

- 🕒 Student support guidance
- 🕒 Admissions query support
- 🕒 Parent communication assistant
- 🕒 Staff policy assistant
- 🕒 IT support for students
- 🕒 Timetable or process guidance
- 🕒 Safeguarding escalation guidance

PROOF-OF-VALUE IDEA

Create a student support or admissions query journey using realistic FAQs, forms and escalation paths.

PARTNER ANGLE

Focus on better service, reduced admin and clearer journeys for students and staff.



7. Legal and professional services

COMMON PAIN

Teams handle document-heavy, process-heavy work where clients and staff need guidance, summaries and clear next steps.

DIGITAL WORKER OPPORTUNITIES

- 🕒 Client intake guidance
- 🕒 Matter opening support
- 🕒 Document request guidance
- 🕒 Internal knowledge assistant
- 🕒 Compliance evidence collection
- 🕒 Billing query support
- 🕒 Case status update support

PROOF-OF-VALUE IDEA

Create a client intake or matter opening journey that collects required details and prepares a summary for the professional team.

PARTNER ANGLE

Focus on reducing admin, improving client experience and preparing better handovers.



8. Public sector and government

COMMON PAIN

Citizens, staff and caseworkers often deal with complex services, forms, eligibility questions and multi-step processes.

DIGITAL WORKER OPPORTUNITIES

- 🕒 Citizen service guidance
- 🕒 Case intake support
- 🕒 Internal policy assistant
- 🕒 Appointment preparation
- 🕒 Evidence collection
- 🕒 Complaint handling guidance
- 🕒 Staff support journeys

PROOF-OF-VALUE IDEA

Start with one citizen service journey that helps users understand what information is needed and when to escalate.

PARTNER ANGLE

Focus on accessibility, consistency, service quality and controlled use of AI.

SECTION 4

Use-case scoring guide

Partners can use this simple scoring guide to prioritise which opportunity to demo or propose first.

Score each criterion from 1 to 5.

Criterion	1	5
Business pain	Minor inconvenience	High frustration, cost or delay
Repeatability	Rare process	Frequent process
Demo clarity	Hard to explain	Easy to show in a simple demo
Data availability	Difficult to get examples	Realistic examples easy to create or provide
Control need	Low need for approvals or boundaries	Clear need for business control, approvals or escalation
Expansion potential	One-off use case	Can expand to many processes or departments



Prioritise use cases with high business pain, high repeatability, clear demo value and manageable first scope.

SECTION 5

Best use cases for a first proof of value

Five recommended journeys that consistently make strong first proof-of-value projects.



Customer support journey

Easy for customers to understand, often high volume and good for showing better handover.



HR onboarding journey

Strong internal use case with clear users, repeated questions and visible employee experience improvement.



IT helpdesk triage

Good for showing better information collection, routing and reduced follow-up questions.



Invoice approval support

Good for demonstrating approval, exception handling and better decision context.



Policy or knowledge assistant

Good for customers with many repeated internal questions and documents.



The best first proof of value is not always the biggest opportunity. It is the opportunity most likely to prove value quickly.

SECTION 6

Turning use cases into partner offers

Partners should not only present use cases as ideas. The growth opportunity is to package them into offers that customers can understand and buy.



Customer Service Digital Worker Starter

INCLUDES

- Use-case discovery workshop
- Guided support journey
- Realistic demo or proof of value
- Escalation handover design



HR Digital Worker Starter

INCLUDES

- Onboarding or policy journey selection
- Guided employee experience
- HR escalation design
- Sample scenarios

 Success criteria and next-step plan



Finance Approval Digital Worker Starter

INCLUDES

-  Approval journey selection
-  Sample invoice scenarios
-  Exception handling design
-  Manager decision screens
-  Proof-of-value report

 Expansion plan



IT Support Digital Worker Starter

INCLUDES

-  Common request selection
-  Guided diagnostics
-  Ticket quality improvement
-  Routing and handover design
-  Pilot plan



Industry Digital Worker Starter

INCLUDES

-  Industry-specific process selection
-  Sector language and examples
-  Compliance-aware journey design
-  Proof-of-value scope
-  Repeatable solution roadmap

SECTION 7

What to avoid when choosing use cases

Common missteps that weaken first demos and slow down proof-of-value projects.



Avoid vague AI use cases

'Use AI to improve operations' is too broad. Pick one process and one journey.



Avoid the most complex process first

Complex, highly political or heavily integrated processes can slow down the first success.



Avoid use cases with no business owner

If no one owns the process, it will be hard to prove value or move forward.



Avoid purely technical demos

Business buyers need to see the journey, pain and outcome.



Avoid unrealistic autonomy

Do not position the digital worker as replacing all human judgement.



Avoid hidden value

If the customer cannot easily see what improved, it is not a good first demo.



Ready to choose the first use case?

Start with a process customers recognise, a journey that can be demonstrated and a business outcome worth measuring.

 [View Demo Guidance](#)

[Explore Proof of Value](#) →

Proof of Value

A proof of value is the safest way for a customer to see whether a Greentic-powered digital worker can improve a real business process. Instead of trying to automate everything at once, the partner and customer choose one journey, test it with realistic examples and agree what success should look like.



The goal is not to build a full production system immediately. The goal is to prove whether the journey is useful, controlled and valuable enough to take further.

DEFINITION

What is a proof of value?

A Greentic proof of value is a focused engagement that shows how one manual or confusing process could become a guided digital worker journey.



Would this improve the user experience?



Would it reduce repetitive work?



Would it collect better information?



Would it improve handover to people?



Would the business trust the level of AI control?



Is this worth developing into a pilot or deployment?



A proof of value should create confidence, not complexity.

TIMING

When to propose a proof of value



After a strong demo

The customer understands the idea and wants to see how it could apply to their own process.



When the customer has a clear pain

There is a repeated process where users get stuck, information is missing or staff waste time chasing details.



When AI interest is high but trust is low

The customer is interested in AI, but needs evidence that it can be controlled inside business operations.



When integration is not ready yet

The customer may not be ready for full system integration, but can still validate the journey using realistic sample data.



When stakeholders need evidence

A proof of value gives business leaders something concrete to review before approving a wider project.



When the partner sees repeatable potential

The first process could become a reusable solution for other departments, customers or industries.

SCOPE

What makes a good scope?

A good proof-of-value scope has:



One business process



One main user journey

✓ One primary user group

✓ A clear business owner

✓ Realistic sample scenarios

✓ Clear success criteria

✓ A visible before-and-after comparison

✓ At least one point where the business remains in control

✓ At least one human handover or escalation example

✓ A clear recommendation at the end

⚠ If the proof of value needs every system, every exception and every user group included from day one, the scope is too broad.

BOUNDARIES

What to include — and what to leave out

✓ Include

- One focused process
- Realistic sample data
- A clear guided user journey
- Key questions and choices
- A business control or approval moment
- A human escalation or handover example
- Basic success measures
- Stakeholder feedback
- Recommendation for next steps

⊗ Leave out for now

- Every process variation
- Every production integration
- Full enterprise rollout
- Complex exception handling
- Replacing all human judgement
- Large-scale data migration
- Advanced reporting
- Long implementation scope
- Anything that distracts from proving the first journey

The proof of value should be strong enough to prove the direction, but small enough to complete without becoming a full transformation project.

DELIVERY

Proof-of-value delivery flow

Select → Scope → Design → Build Demo → Validate → Report → Decide

1

Select

Choose the process that has the right mix of pain, visibility and achievability.

ACTIVITIES

- Identify candidate processes
- Score them against business pain and demo clarity
- Pick one journey
- Confirm the business owner

OUTPUT

Selected proof-of-value use case.

2

Scope

Agree exactly what will be shown, tested and measured.

ACTIVITIES

- Define included user journey
- Define excluded areas
- Agree sample scenarios
- Agree success criteria
- Confirm stakeholder review group

OUTPUT

Clear proof-of-value scope.

3

Design

Design the improved guided journey.

ACTIVITIES

- Map the current manual journey
- Identify where users get stuck
- Define questions, choices and summaries
- Define approval or control points
- Define human handover

OUTPUT

Target guided digital worker journey.

4

Build demo

Create the proof-of-value experience using realistic examples.

ACTIVITIES

- Build the guided journey
- Add realistic sample data
- Prepare before-and-after story
- Prepare presenter notes
- Prepare test scenarios

OUTPUT

Working proof-of-value demonstration.

5

Validate

Test the journey with stakeholders and realistic examples.

ACTIVITIES

- Run selected scenarios
- Capture feedback
- Check whether the journey is clearer
- Check whether information collection improves
- Check whether handover is useful
- Review AI control and business confidence

OUTPUT

Validated findings and improvement points.

6

Report

Summarise what was proven and what remains to be decided.

ACTIVITIES

- Document outcomes
- Compare against success criteria
- Capture stakeholder feedback
- Highlight risks and assumptions
- Recommend next steps

OUTPUT

Proof-of-value summary report.

7

Decide

Agree whether to progress to pilot, deployment, wider discovery or no further action.

ACTIVITIES

- Review business value
- Confirm production requirements
- Agree next scope
- Identify expansion opportunities
- Decide commercial next step

OUTPUT

Customer decision and next-step plan.

MEASUREMENT

Example success criteria

Success criteria should be agreed before the proof of value starts. They should focus on business improvement, not just whether the demo works.



User experience

Can the user understand what to do next more easily than in the current process?



Information quality

Does the digital worker collect the right information before work is handed to a person or team?

EXAMPLE MEASURE

Stakeholder review confirms the guided journey is clearer than the current approach.



Manual effort

Does the journey reduce repetitive questions, chasing or handovers?

EXAMPLE MEASURE

Stakeholders identify specific manual steps that could be reduced or removed.

EXAMPLE MEASURE

Test scenarios show fewer missing details compared with the current process.



Control and trust

Does the business feel comfortable with where AI is used and where human control remains?

EXAMPLE MEASURE

Business owner approves the control, approval and escalation points.



Handover quality

When escalation happens, does the person receive useful context?

EXAMPLE MEASURE

Reviewers confirm the summary and collected information would help them act faster.



Expansion potential

Could the same approach be reused for other processes or departments?

EXAMPLE MEASURE

Stakeholders identify at least two related journeys that could be explored next.

INPUTS

What the customer needs to provide

A proof of value can often start with anonymised, simplified or realistic sample data. The customer does not need to provide full production access at the beginning.

Example requests

Example emails or tickets

Example forms

Example approval scenarios

Example invoices or documents

Common FAQs or policies

Current process description

Current pain points

Escalation rules

Approval rules

Example successful and failed journeys

Stakeholders for review



Use anonymised or synthetic examples where needed. The important thing is that the scenarios feel realistic to the business.

PACKAGES

Example proof-of-value packages



Customer Service PoV

Improve one support journey from customer request to resolution or escalation.

EXAMPLE SCENARIOS

- Delivery issue
- Billing question
- Product fault
- Account change
- Complaint intake

WHAT TO PROVE

- Better issue identification
- Better information collection
- Better escalation summary
- Faster route to next step



HR Onboarding PoV

Guide a new employee or manager through a common onboarding journey.

EXAMPLE SCENARIOS

- First-week checklist
- Equipment request
- Policy questions
- Missing documents
- Manager onboarding tasks

WHAT TO PROVE

- Less repetitive HR admin
- Clearer employee journey
- Better task completion
- Better escalation to HR



IT Helpdesk PoV

Improve ticket quality and routing for common IT requests.

EXAMPLE SCENARIOS

- Password problem
- Laptop issue
- Software access request
- Connectivity issue
- New starter IT setup

WHAT TO PROVE

- Better diagnostics
- Fewer missing details
- Faster routing
- Better handover to IT



Invoice Approval PoV

Support invoice review, exception handling and approval preparation.

EXAMPLE SCENARIOS

- Matching invoice
- Missing purchase order
- Amount mismatch
- Duplicate invoice risk
- Approval request

WHAT TO PROVE

- Clearer approval context
- Faster manager review
- Better exception handling
- Reduced email chasing



Policy or Knowledge Assistant PoV

Help users find and apply internal knowledge in a guided way.

EXAMPLE SCENARIOS

- HR policy question
- IT process question
- Finance expense question
- Compliance requirement
- Internal procedure

WHAT TO PROVE

- Faster answers
- Better next-step guidance
- Reduced repetitive questions
- Clear escalation for uncertainty

TEMPLATE

Proof-of-value template

A copy-friendly structure you can adapt for any customer engagement.

TITLE

[Process name] Digital Worker Proof of Value

OBJECTIVE

To test whether a guided digital worker can improve [business process] by helping [target users] complete [journey] more easily, with better information collection, clearer handover and appropriate business control.

SCOPE — INCLUDED

- [User journey]
- [Target user group]
- [Sample scenarios]
- [Guided experience]
- [Control or approval point]
- [Escalation or handover example]

SCOPE — EXCLUDED

- [Full production integration]
- [All process variations]
- [Full rollout]
- [Advanced reporting]
- [Anything outside the first journey]

CUSTOMER INPUTS

- [Sample requests]
- [Process description]
- [Example documents]
- [Approval or escalation rules]
- [Stakeholder reviewers]

SUCCESS CRITERIA

- [User journey is clearer]
- [Information collected is more complete]
- [Manual chasing is reduced]
- [Handover is more useful]
- [Business control is acceptable]
- [Next-step decision can be made]

DELIVERABLES

- Guided digital worker proof-of-value demo
- Sample scenarios
- Stakeholder review session
- Findings summary
- Recommendations for pilot or deployment
- Suggested next-step scope

TIMELINE

A proof of value is typically scoped as a focused short engagement. The exact timeline depends on customer availability, sample data, review cycles and complexity.

DECISION AFTER POV

→ Progress to pilot

→ Progress to production planning

→ Expand discovery

→ Test another process

→ Pause because value was not strong enough

REPORT

Final report structure

At the end of the proof of value, partners should give the customer a clear summary that supports a decision.

1 Executive summary

What was tested and what was learned?

2 Process reviewed

What current process or journey was selected?

3 Current pain points

What manual effort, delay, missing information or handover issues exist today?

4 Digital worker journey

How did the proof of value improve the journey?

5 Success criteria review

What criteria were met, partly met or not met?

6 Stakeholder feedback

What did business users, managers or reviewers say?

7 Risks and assumptions

What needs to be checked before pilot or deployment?

8 Recommended next step

What should the customer do next?

9 Expansion opportunities

What similar journeys could be improved later?

PITFALLS

What to avoid



Avoid vague scope

Everyone should know what is included and what is excluded.



Avoid trying to prove everything

The proof of value should prove one journey well, not ten journeys badly.



Avoid unrealistic data

Sample data should still feel recognisable to the customer.



Avoid hiding human control

Show where a person approves, reviews or takes over.



Avoid overpromising AI autonomy

Do not imply that AI will run business-critical work without boundaries.



Avoid measuring only technical completion

A working demo is not enough. The question is whether it creates business confidence.



Avoid ending without a decision

The proof of value should lead to a clear recommendation and next step.



Ready to define the first proof of value?

Choose one business process, one guided journey and one clear outcome. Prove value first, then scale.

[Explore Use Cases →](#)

[View Demo Guidance](#)

Training

Greentic partner training is designed to help partners move from understanding the story to confidently selling, demoing, delivering and scaling digital worker solutions. The goal is not only to learn the platform, but to build a repeatable partner capability around practical AI adoption.



Partners should be able to explain Greentic in business language, identify the right first use cases, run compelling demos, deliver focused proof-of-value projects and package successful journeys into repeatable offers.

GOALS

What partner training should achieve



Explain Greentic clearly

Partners should be able to explain Greentic, guided digital workers and AI with business control in simple business language.



Spot good opportunities

Partners should know how to identify processes where customers feel real pain and where a guided digital worker could prove value quickly.



Run confident demos

Partners should be able to show a business journey, not just a technology screen.



Scope proof-of-value projects

Partners should understand how to start small, define success criteria and avoid overly broad first engagements.



Deliver with control

Partners should know how to design guided journeys with approval points, boundaries and human handover.



Build repeatable offers

Partners should learn how to turn successful projects into reusable department or industry solutions.

LEARNING PATH

The Greentic partner learning path

Understand → Position → Demo → Prove → Deliver → Package → Grow

1

Understand

Learn what Greentic is, what digital workers are and why businesses need guided AI adoption.

LEARNING FOCUS

- What Greentic helps partners do
- What a guided digital worker is
- Why AI needs business control
- How Greentic differs from chatbots, RPA and pure autonomous AI

OUTCOME

Partner can explain the Greentic concept clearly.

2

Position

Learn how to connect Greentic to customer problems and business outcomes.

LEARNING FOCUS

- Customer pain points
- Buyer personas
- Business outcomes
- Objection handling
- Discovery questions

OUTCOME

Partner can lead an early sales conversation.

3

Demo

Learn how to demonstrate a better business journey.

LEARNING FOCUS

- Demo storytelling
- Before-and-after framing
- Realistic sample data
- Guided user journeys

OUTCOME

Partner can run a compelling first demo.

- Control and escalation moments
- Closing with next steps

4

Prove

Learn how to define a focused proof of value.

LEARNING FOCUS

- Use-case selection
- Scope control
- Success criteria
- Customer inputs
- Stakeholder review
- Final recommendations

OUTCOME

Partner can propose a clear proof-of-value engagement.

5

Deliver

Learn how to move from demo to pilot or deployment.

LEARNING FOCUS

- First workshop structure
- Process discovery
- Journey design
- Acceptance testing
- Go-live checklist
- 30/60/90-day adoption plan

OUTCOME

Partner can support a first customer engagement successfully.

6

Package

Learn how to turn repeatable journeys into partner offers.

LEARNING FOCUS

- Department-specific offers
- Industry-specific offers
- Reusable templates
- Repeatable demos
- Expansion planning

OUTCOME

Partner can create repeatable solutions, not just one-off projects.

7

Grow

Learn how to scale capability across the partner organisation.

LEARNING FOCUS

- Training sales teams
- Training delivery teams
- Building internal champions
- Measuring pipeline and conversion
- Expanding customer accounts

OUTCOME

Partner can build a sustainable Greentic-powered business motion.

MODULES

Suggested training modules



MODULE 1

Greentic basics

Understand what Greentic is and how to explain it to customers.

TOPICS

- What Greentic is
- What guided digital workers are
- Why businesses need practical AI adoption
- Key differences from chatbots, traditional automation and pure autonomous AI
- Core partner opportunity

PRACTICAL EXERCISE

Write a 30-second Greentic explanation for a business buyer.



MODULE 2

Digital worker opportunity discovery

Learn how to identify good first customer opportunities.

TOPICS

- Recognising manual process pain
- Finding repeated requests
- Spotting missing information and messy handovers
- Choosing visible, valuable and achievable use cases
- Avoiding overly complex first projects

PRACTICAL EXERCISE

Score three possible customer processes and choose the best first proof-of-value candidate.



MODULE 3

Sales positioning and objection handling

Help partners lead early customer conversations confidently.

TOPICS



MODULE 4

Demostorytelling

Learn how to run demos that show business value.

TOPICS

- Customer pain points
- Business outcomes
- Buyer personas
- Discovery questions
- Objection handling
- AI with business control

PRACTICAL EXERCISE

Role-play a first meeting with a customer service, HR, finance or IT buyer.

- Before-and-after story
- Guided journey design
- Realistic sample data
- Main menu and clear choices
- Business control moments
- Human handover
- Closing with proof-of-value next steps

PRACTICAL EXERCISE

Prepare and present a five-minute demo story for one selected use case.



MODULE 5

Proof-of-value scoping

Learn how to turn interest into a focused first engagement.

TOPICS

- What a proof of value is
- Scope included and excluded
- Customer inputs
- Success criteria
- Stakeholder review
- Final report and next-step decision

PRACTICAL EXERCISE

Create a one-page proof-of-value scope for a selected customer process.



MODULE 6

Delivery method

Learn how to deliver the first engagement successfully.

TOPICS

- Discover, Design, Demo, Validate, Deploy, Scale
- First customer workshop
- Process discovery checklist
- Guided journey design
- Acceptance testing
- Go-live checklist
- Adoption plan

PRACTICAL EXERCISE

Create a delivery plan for a first proof-of-value project.



MODULE 7

AI control and business trust

Learn how to explain and design AI with business control.

TOPICS

- Where AI should help
- Where the business must stay in control
- Approval points
- Escalation rules
- Human judgement
- Avoiding overpromised autonomy
- Building customer trust

PRACTICAL EXERCISE

Identify AI assistance points and human control points in a sample journey.



MODULE 8

Building repeatable partner offers

Learn how to package successful journeys into reusable services.

TOPICS

- Turning one project into a repeatable offer
- Department-specific starter packages
- Industry-specific solution packaging
- Reusable demos and templates
- Customer expansion plans
- Partner growth metrics

PRACTICAL EXERCISE

Design a named partner offer for one department or industry.

ROLES

Training tracks by partner role



Sales teams

RECOMMENDED MODULES

- Greentic basics
- Opportunity discovery
- Sales positioning and objection handling
- Demo storytelling
- Proof-of-value scoping

WHAT THEY SHOULD BE ABLE TO DO

Explain Greentic clearly, qualify opportunities, handle objections and guide customers towards a focused proof of value.



Demospecialists

RECOMMENDED MODULES

- Greentic basics
- Demo storytelling
- Digital worker opportunity discovery
- AI control and business trust
- Proof-of-value scoping

WHAT THEY SHOULD BE ABLE TO DO

Run business-focused demos that show a better guided journey, not just an AI conversation.



Delivery teams

RECOMMENDED MODULES



Partner leaders

RECOMMENDED MODULES

- Greentic basics
- Proof-of-value scoping
- Delivery method
- AI control and business trust
- Building repeatable partner offers

WHAT THEY SHOULD BE ABLE TO DO

Run workshops, design guided journeys, validate proof-of-value projects and support controlled deployments.

- Greentic basics
- Building repeatable partner offers
- Sales positioning and objection handling
- Proof-of-value scoping
- Partner growth planning

WHAT THEY SHOULD BE ABLE TO DO

Build a repeatable Greentic business motion, choose target markets and develop packaged offers.



Industry specialists

RECOMMENDED MODULES

- Greentic basics
- Opportunity discovery
- Demo storytelling
- Proof-of-value scoping
- Building repeatable partner offers

WHAT THEY SHOULD BE ABLE TO DO

Translate Greentic into industry-specific digital worker solutions using customer language and sector pain points.

READINESS

Suggested partner readiness levels



These readiness levels can be used as an internal partner development path. They can later become formal certifications if Greentic chooses to introduce a certification programme.



Greentic Sales Ready

A partner is Sales Ready when they can:

- ✓ Explain Greentic in simple business language
- ✓ Describe guided digital workers
- ✓ Position Greentic against chatbots, traditional automation and pure autonomous AI
- ✓ Identify good first use cases
- ✓ Ask discovery questions
- ✓ Handle common objections
- ✓ Propose a proof-of-value next step



Greentic Demo Ready

A partner is Demo Ready when they can:

- ✓ Run a business-focused demo
- ✓ Tell the before-and-after story
- ✓ Use realistic sample data
- ✓ Show guided choices and next steps
- ✓ Show business control and escalation
- ✓ Connect the demo to measurable outcomes
- ✓ Close with a proof-of-value proposal



Greentic Delivery Ready

A partner is Delivery Ready when they can:

- ✓ Run a first customer workshop
- ✓ Map the current process
- ✓ Design the guided digital worker journey
- ✓ Define scope and success criteria
- ✓ Validate with realistic scenarios
- ✓ Support controlled rollout
- ✓ Recommend next steps



Greentic Solution Builder

A partner is Solution Builder ready when they can:

- ✓ Turn repeated use cases into named offers
- ✓ Create reusable messaging
- ✓ Reuse demo scripts and proof-of-value templates
- ✓ Build department or industry-specific starter packages
- ✓ Plan customer expansion
- ✓ Measure partner growth

EXERCISES

Practical exercises for partner teams

1

Explain Greentic in 30 seconds

TASK

Write and practise a short explanation for a business buyer.

SUCCESS LOOKS LIKE

The explanation avoids jargon and clearly explains the business value.

2

Choose the best first use case

TASK

Compare three possible customer processes and score them for pain, repeatability, demo clarity, control need and expansion potential.

SUCCESS LOOKS LIKE

3 Build the demostory

TASK

Create a before-and-after demo story for one customer journey.

SUCCESS LOOKS LIKE

The demo shows the current pain, the guided journey, the control moment and the business outcome.

The team can explain why one use case is the best first proof-of-value candidate.

4 Scope a proof of value

TASK

Create a one-page proof-of-value scope with objective, included scope, excluded scope, customer inputs, success criteria and next-step decision.

SUCCESS LOOKS LIKE

The scope is focused enough to be achievable and clear enough for the customer to approve.

5 Identify AI control points

TASK

Review a sample digital worker journey and decide where AI can help, where approvals are needed and when a person should take over.

SUCCESS LOOKS LIKE

The team can explain how AI adds value without removing business control.

6 Package a repeatable offer

TASK

Turn one successful use case into a named partner offer.

SUCCESS LOOKS LIKE

The offer has a target buyer, clear problem, expected outcome, proof-of-value scope and expansion path.

RESOURCES

Training resources partners should build



Internal pitch deck

A short deck that explains Greentec, target use cases, business value and proof-of-value approach.



Demoscripts

Repeatable scripts for customer service, HR, finance, IT, sales or industry-specific journeys.



Discovery checklist

A list of questions sales and delivery teams use in the first customer meeting.



Proof-of-value template

A standard template for objective, scope, success criteria, customer inputs and next-step decision.



Objection-handling guide

A guide for answering common questions about chatbots, automation, autonomous AI, control and integration.



Use-case scorecard

A simple scoring method for choosing the best first customer opportunity.



Customer expansion map

A template for identifying the next department, process or channel after the first success.

PLAN

30/60/90-day partner enablement plan



First 30 days: Foundation

- Review the starter kit
- Train core sales and delivery leads
- Choose target customer segments
- Select first three use cases
- Prepare the first demo story
- Create a basic discovery checklist

OUTCOME



Days 31–60: Customer conversations

- Run discovery calls
- Deliver first demos
- Refine messaging
- Identify proof-of-value candidates
- Practise objection handling
- Build first proof-of-value scopes

OUTCOME



Days 61–90: Repeatability

- Deliver first proof-of-value projects
- Capture lessons learned
- Package the strongest use case
- Train more team members
- Create campaign messaging
- Build an expansion plan

OUTCOME

The partner can start confident customer conversations.

The partner has active customer opportunities and repeatable sales material.

The partner has the foundation for a repeatable Greentic growth motion.

METRICS

How to measure training success



People trained

How many team members can explain Greentic confidently?



Pitches practised

How many people can deliver the 30-second and 2-minute pitch?



Demos delivered

How many team members can run a clear business-focused demo?



Use cases identified

How many qualified customer opportunities have been identified?



Proof-of-value scopes created

How many focused PoV proposals have been prepared?



Objections handled

How confidently can the team answer questions about chatbots, automation, autonomous AI and business control?



Repeatable offers created

How many packaged department or industry offers has the partner created?



Customer progress

How many trained conversations lead to demos, proof-of-value projects or deployments?

PITFALLS

What to avoid



Avoid starting with technical detail

Most partner teams first need the business story, not product internals.



Avoid generic AI messaging

Train teams to explain practical business improvement, not vague AI transformation.



Avoid feature memorisation

Partners should understand customer problems, journeys and outcomes before memorising features.



Avoid demoing without a story

A screen walkthrough is less powerful than a business before-and-after journey.



Avoid overpromising autonomy

Partners must explain AI with control, not uncontrolled AI decision-making.



Avoid skipping proof-of-value scoping

Interest should turn into a focused next step, not a vague 'let's keep talking' conversation.



Avoid treating training as one-off

Partner capability improves through practice, feedback, repeated demos and customer conversations.



The best Greentic partners are not only trained on a product. They are trained to identify business pain, tell a clear digital worker story, prove value quickly and package what works into repeatable customer solutions.



Ready to build partner capability?

Start by training a small core team to explain, demo and scope Greentic opportunities.
Then expand capability as customer demand grows.

[Explore Starter Kit →](#)

[Explore Use Cases](#)

[Explore Proof of Value](#)

FAQ

Use these answers to explain Greentic clearly in customer conversations. The aim is to keep the message simple: Greentic helps organisations turn manual processes into guided digital workers that improve everyday work while keeping AI under business control.



These FAQs are written for business conversations, not technical deep dives.

FOUNDATIONS



Greentic basics

What is Greentic?



What is a digital worker?



What problems does Greentic help solve?



Who is Greentic for?



Who uses Greentic inside a customer organisation?



POSITIONING



How Greentic is different

Is Greentic just a chatbot?



How is Greentic different from traditional RPA?



How is Greentic different from pure autonomous AI agents?



Why not just use ChatGPT or another AI assistant?



What does "AI with business control" mean?



OUTCOMES



Business value

What business outcomes can Greentic support?



How can Greentic improve customer experience?



How can Greentic improve employee experience?



How does Greentic reduce manual work?



Does Greentic replace people?



GETTING STARTED



Starting with a proof of value

What is a proof of value?



Why start with a proof of value?



What makes a good first use case?



Does a proof of value need full production integration?



What should a proof of value prove?



TRUST



AI control, trust and governance

How do we stop AI going off track?



Can humans stay in the loop?



Can approvals be kept with managers?



Is Greentic suitable for regulated industries?



Can Greentic support auditability?



EXPERIENCE



Channels and user journeys

Where can users interact with a Greentic digital worker?



Does Greentic only work through chat?



Why are guided experiences important?



Can Greentic work for both customers and employees?



PARTNERS



Partner opportunity

How can partners make money with Greentic?



What types of partners are a good fit?



Can partners create their own solutions?



How should partners start?



What makes a partner successful?



SALES



Common sales objections

"We already have a chatbot."



"We already use automation tools."



"We are not ready for AI in operations."



"This sounds too broad."



"Will this be expensive to start?"



"How quickly can we get value?"



SELECTION



Choosing the first opportunity

Which use cases are best for a first demo?



Which use cases should partners avoid first?



What if the customer wants to automate everything?



How do we know if a use case is worth pursuing?



Greentic is easiest to explain when partners start with the business journey. What is slow, manual or confusing today? How could a guided digital worker make it easier, faster and more controlled? Start there, prove value with one focused journey and expand from success.



Ready to answer customer questions with confidence?

Use the starter kit, demo guidance and proof-of-value approach to turn early interest into clear next steps.

[Explore Starter Kit →](#)

[View Use Cases](#)

[Explore Proof of Value](#)