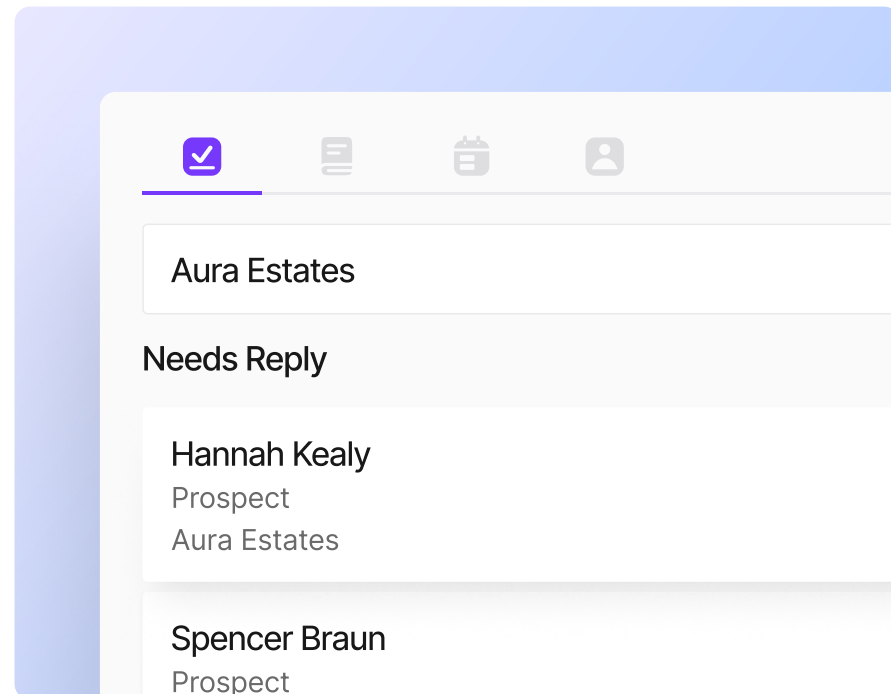


Elise Sidekick

Switch Tabs, Stay on Task with Elise Sidekick



Elise Sidekick is a sidebar extension that helps you easily access & respond to AI tasks, review pending knowledge, see calendar & tour details, and look up contacts - all without switching tabs.

Setup



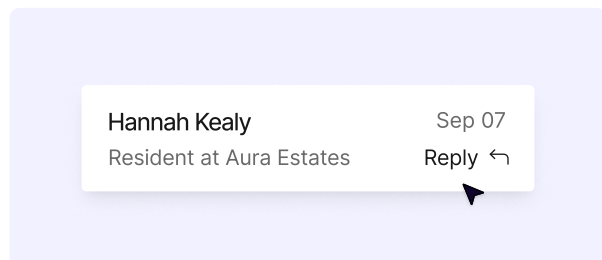
Download Elise Sidekick for [Microsoft Edge](#) or [Google Chrome](#)



Log in with your EliseCRM credentials

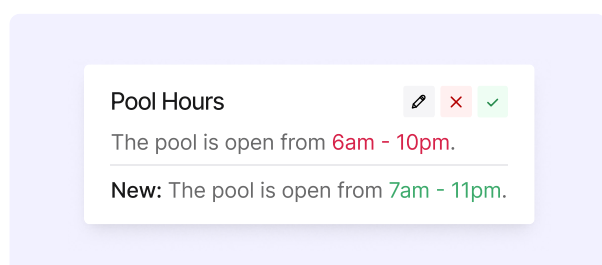


Click the Settings gear & toggle 'Task Notifications' to on



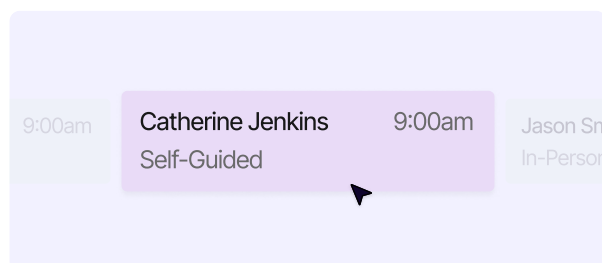
Tasks

Click 'Reply' to view the question and conversation history, then enter your response and click 'Send.' You can also add internal notes for team communication. If you dismiss a task, include an internal note explaining how it was handled offline.



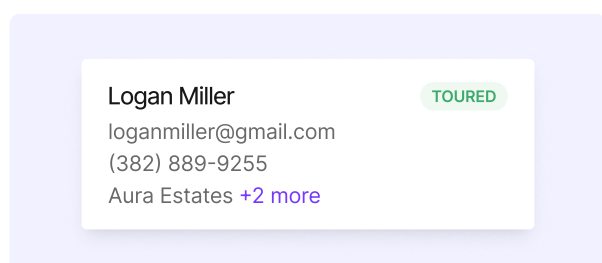
Pending Knowledge

Suggested knowledge is highlighted in green, and current knowledge (if applicable) in red. Select the [checkmark] to approve, [pencil icon] to edit before approval, or [x] to decline.



Calendar

Click on a tour appointment to access the prospect's conversation history, review tour details, and view their unit preferences for better insights.



Contacts

Search for a prospect or resident by name, email, or phone number, and click 'View' to access their conversation history and details. For prospects, you'll see unit preferences, and for residents, unit details. You can also filter by status, such as current, past, or future.