Helix Chatbot: Customer Quick Start & User Guide

Your Interactive Assistant for Parts, Tracking, and Resources

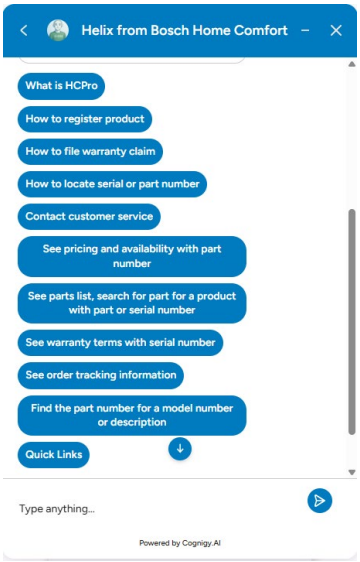
1. Welcome to Helix!

Helix is our intelligent digital chat agent designed to make your experience faster, smoother, and more efficient. Available 24/7, Helix can help you track your order shipment, check pricing and availability, locate parts, quickly access critical support resources, and answer simple questions, all in one place.

This guide is designed to help you get the most out of Helix, ensuring you know exactly how to structure your inputs for rapid and accurate answers.

2. Features Overview & How to Use Them

When you start a conversation with Helix, you will be presented with a menu of quick-action options. Below is an overview of each key feature:



- **What is HCPro:** Ask questions and learn about the HCPro partner program for contractors – the benefits and how to sign up.
- **How to Register a Product:** Receive instructions on how to register your equipment and link to registration form to ensure warranty coverage and reliable records as both homeowners and installers.
- **How to File a Warranty Claim:** Receive instructions on filing claims as homeowners, contractors, and distributors. Provides a link to our online claim portal, Home Comfort Claims.
- **How to Locate Serial or Part Number:** Receive PDF instructions on where to find crucial identification numbers on your physical unit.
- **Contact Customer Service:** View support desk hours, inquiry form link, and contact numbers if your query requires human assistance.
- **Quick Links:** Receive direct links to frequently viewed pages and resources.
- **Find Part Number with Model Number or Model Description:** Use this tool if you only know your unit's model number or description. It will help you find the correct part number to use in other search tools.

- **See Pricing and Availability:** Use part number to retrieve pricing and inventory information.
- **See Parts List & Search for Part:** Use part or serial number to retrieve exploded diagrams (if available) and display a searchable parts list.

> **PRO TIP:** *Because Helix's pricing and parts lookups require precise part numbers, use the 'Find Part Number with Model Number...' tool first if you only know your unit's model number or description. This ensures seamless database queries.*

- **See Warranty Terms:** Use a 26-character serial number, with input of use case, to retrieve warranty period / terms.
- **See Order Tracking:** Use specific combinations of sales order number, purchase order number, customer number, and incident number, to retrieve tracking information on shipment.

3. Advanced Features & Input Requirements

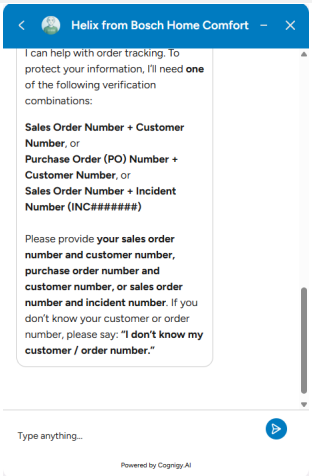
To provide accurate, real-time database results, some of Helix's tools require inputs formatted in specific ways. Please review the rules below:

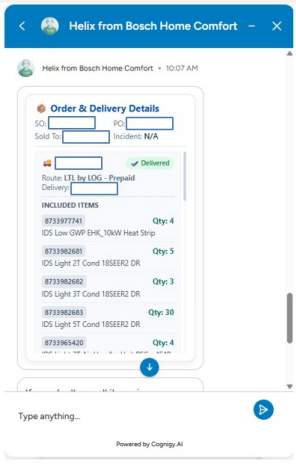
3.1 Order Tracking & Status

Check your order status securely without waiting for an agent. To protect your sensitive data, Helix requires you to provide one of the following exact verification combinations:

1. **Sales Order Number + Customer Number**
2. **Purchase Order (PO) Number + Customer Number**
3. **Sales Order Number + Incident Number**

> **IMPORTANT NOTE:** *The system does not support a combination of Sales Order Number and Purchase Order Number. Make sure you have your Customer Number or Incident Number ready! The information can be found on Order Receipt.*
> *If you do not see all items or order is not found, please keep in mind to allow 24 hours for information to update in system.*





3.2 See Pricing & Availability with Part Number

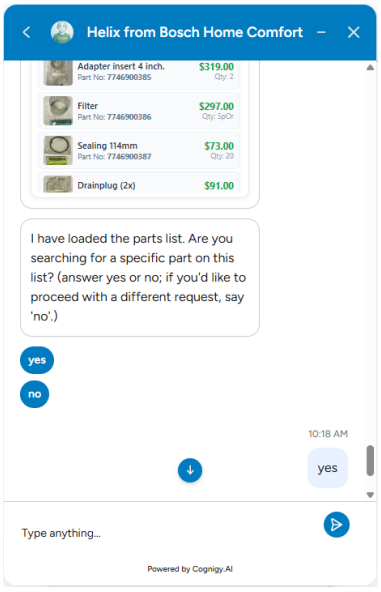
Instantly query stock levels and pricing.

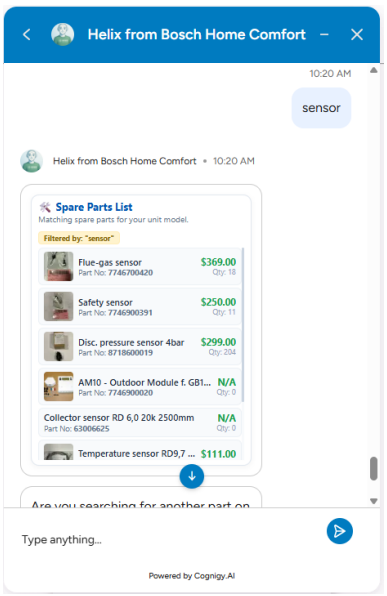
- **Input Rule:** This tool requires a **valid part number**.
- **Constraint:** It will **not** work with model numbers or model names. If you only have a model name/number, use the "Find Part Number with Model Number…" tool first to retrieve the correct part number.

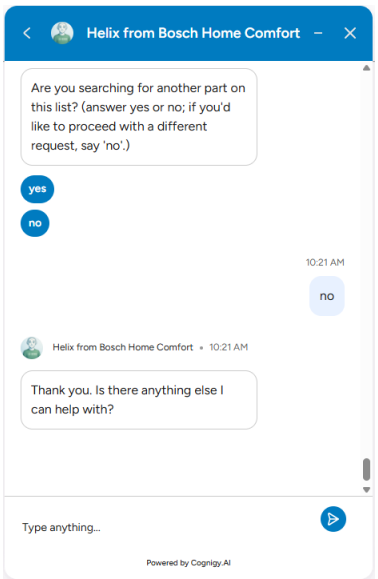
3.3 See Parts List & Search for Part

Retrieve exploded diagrams and searchable parts list.

- **For General Part Searches:** Parts list can be retrieved using a **valid part number or serial number** format for a unit, as long as it exists in our active database.
  - After parts list is pulled up, chatbot will prompt you with 'would you like to search for a part' question. Please prompt it with the name of the desired part, and parts list will be filtered based on the part name given.
- **For Exploded Diagrams:** Exploded diagrams can be retrieved using a **standard part number** or a **serial number** matching Bosch's current 26-character format (e.g., `399A-012-000012-0123456789`).
- **Constraint:** It will **not** work with model numbers or model names. If you only have a model name/number, use the "Find Part Number with Model Number…" tool first to retrieve the correct part number.







3.4 See Warranty Terms with Serial Number

Helix will check and display the warranty terms and duration for your product.

- **Constraint:** This feature only works with the modern Bosch **26-character serial number** format (e.g., `399A-012-000012-0123456789`).

4. Quick Links Hub

Selecting Quick Links in the Helix menu or simply type in ‘quick links.’ Helix will provide a menu to access to our most frequently accessed online resources:

- **Service & Support Resources**
- **General Product Information & Technical Documentation (Tech Docs)**
- **Rebates & Tax Credits**
- **Residential Installer & Commercial Rep Locators**
- **Aftermarket Resource Center (ARC)**
- **Partner Portal**
- **Claim Portal**
- **Trainings Page**