

Effizientes Arbeiten mit epilot

Tipps & Tricks für den operativen Alltag

Agenda

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Ankommen & Kennenlernen

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epilot effizient nutzen: Funktionen, Tipps & direktes Ausprobieren

10 Minuten Pause

3

Roadmap Ausblick: Was erwartet euch als nächstes?

4

Offene Fragen & Feedback

Ankommen & Kennenlernen

Das Team für euren Workshop



Linda Rohde
Senior Onboarding Manager



Alexandra Kail
Onboarding Manager

Kennenlernen & gemeinsame Runde zum Einstieg

- ✓ Wer bist du & was ist deine Rolle?
- ✓ Nutzt du epilot konfigurativ oder operativ?
- ✓ Wie erfahren bist du?
- ✓ Was wünschst du dir vom heutigen Workshop?

Funktionen, Tipps & direktes Ausprobieren

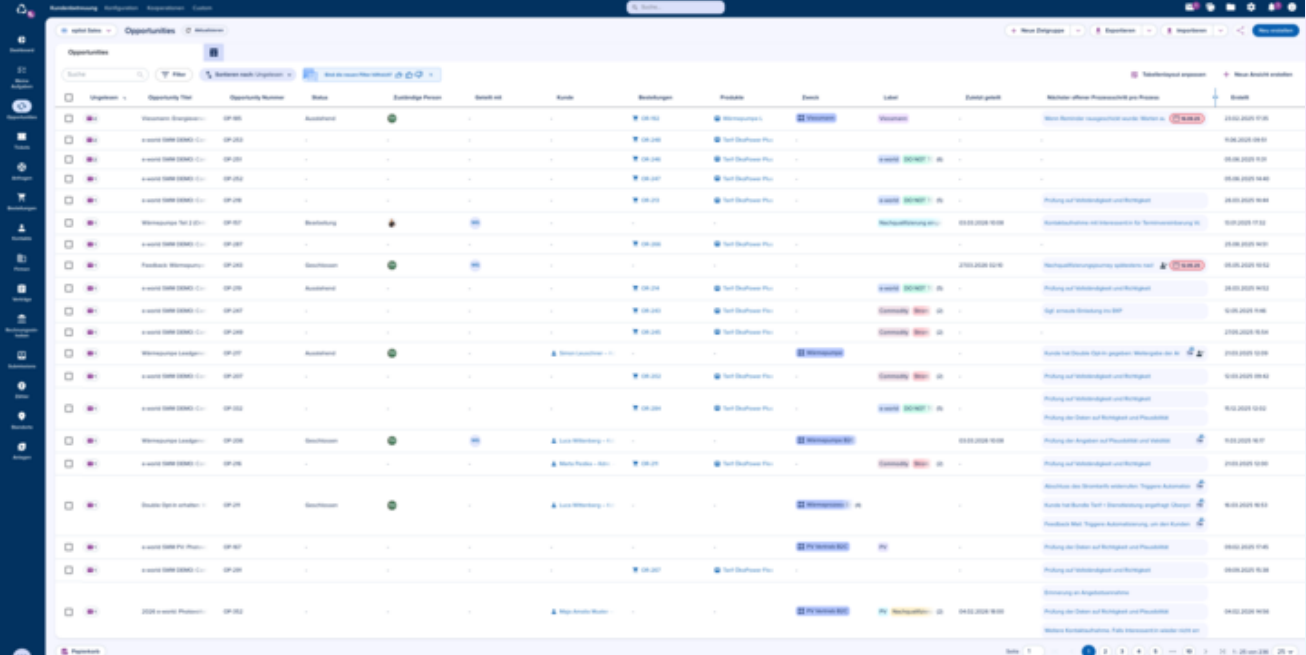
Das erwartet Euch heute



Ansichten

Was ist neu?

- Erweiterte Sortierungsmöglichkeiten
- Neue Filterfunktionen
- Und/Oder Filtermöglichkeiten über Gruppen
- Bulk Actions

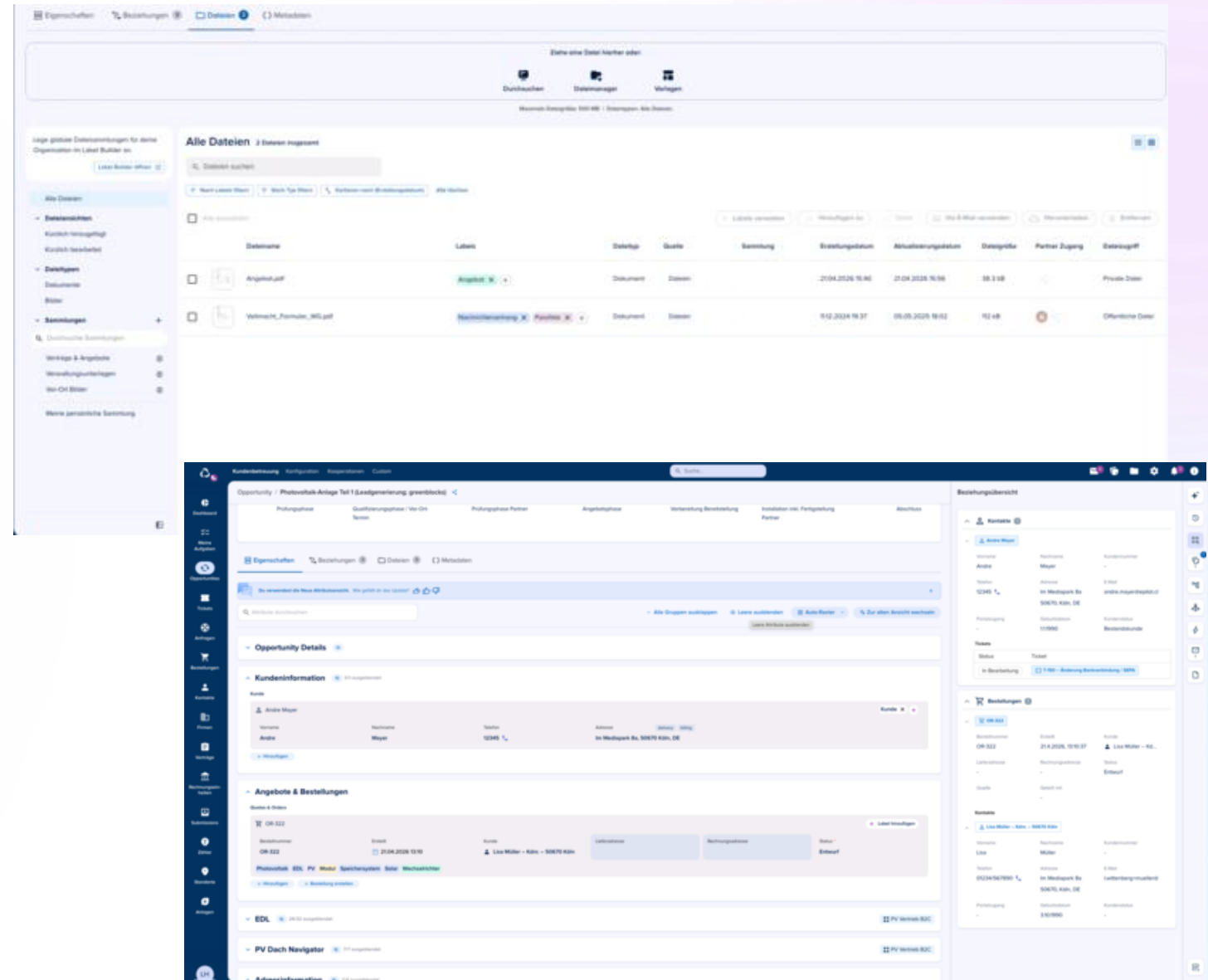


The screenshot displays the 'Opportunities' view in the epiLot CRM. The interface includes a search bar at the top, a sidebar with navigation icons, and a main table of data. The table has the following columns: 'Umgang', 'Opportunity Title', 'Opportunity Number', 'Status', 'Endliche Phase', 'Startzeit', 'Kunde', 'Belegungen', 'Probleme', 'Ziele', 'Lider', 'Erster gesch.', 'Mitarbeiter', and 'Erstellt am'. The table contains multiple rows of opportunity records, each with a status indicator (e.g., green circle for 'Aktuell', red circle for 'Beendet') and various action buttons. The bottom of the screen shows a pagination bar with 'Seite 1' and a total of '28' items.

Entitätenansicht

Was ist neu?

- 360° Ansicht
- Neue Attributansicht
- Collections



E-Mails

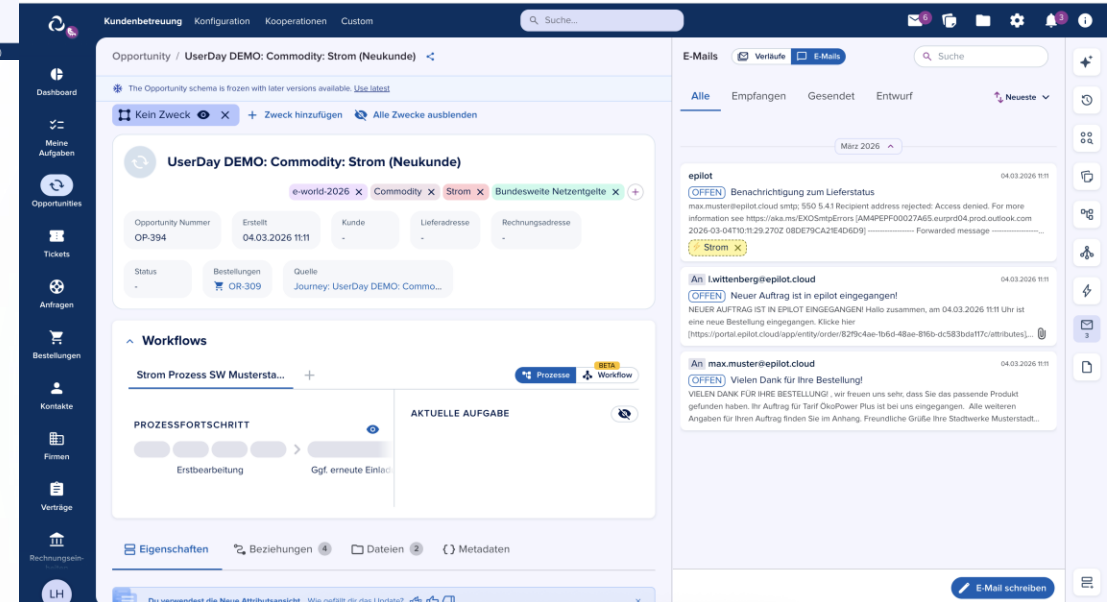
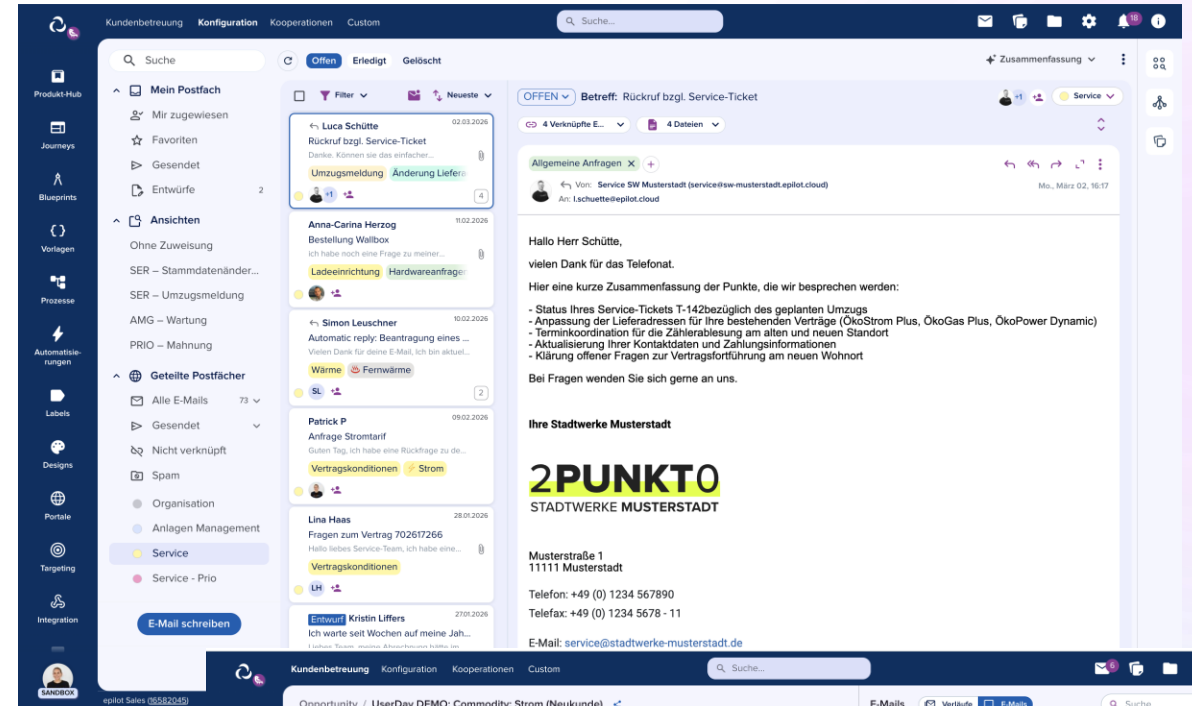
Was ist neu?

Zentrales Postfach

- Geteilte Postfächer
- KI-Funktionalitäten
- Journeys in der Seitenleiste

Auf der Entität

- Verlauf vs. E-Mail Ansicht



Zeit für die Anwendung in epilot!

The screenshot displays the epilot CRM application interface on a laptop. The main content area is titled "Opportunities" and shows a list of tasks under the heading "Meine Opportunities (modified)". The interface includes a search bar, filters, and a table of tasks with columns for "Opportunity Number", "Next Open Workflow Task Per Workflow", "Purposes", and "Opportunity Title".

Ungesehen	Opportunity Number	Next Open Workflow Task Per Workflow	Purposes	Opportunity Title
<input type="checkbox"/>	OP-185	Angaben auf Vollständigkeit und Plausibilität prüfen	Hausanschluss Fernwärme	OP-185 Formular Arbeitsbescheinigung
<input type="checkbox"/>	OP-221	Dokumente/ Fotos aus Vor-Ort-Termin über verknüpfte Klickstrecke hochladen.	PV Vertrieb B2C	OP-221 Photovoltaik-Anlage Teil 1 (Leadgenerierung) 2024
<input type="checkbox"/>	OP-211	Während des Vor-Ort-Termins: Zusätzliche Informationen und Fotos einholen - Daten ub	PV Vertrieb B2C	Photovoltaik-Anlage Teil 1 (Leadgenerierung) 5
<input type="checkbox"/>	OP-180	Angaben auf Vollständigkeit und Plausibilität prüfen in 8 days	Hausanschluss Fernwärme	OP-180 Formular Arbeitsbescheinigung
<input type="checkbox"/>	OP-181	Netzanschluss und Anschlussobjekt vorhanden? in 8 days	Hausanschluss Strom	OP-181 Hausanschluss Strom
<input type="checkbox"/>	OP-217	Prüfung der Daten auf Richtigkeit und Plausibilität AW	PV Vertrieb B2C	OP-217 Photovoltaik-Anlage Teil 1 (Leadgenerierung) 2024
<input type="checkbox"/>	OP-105	Überprüfe die Kundendaten auf ihre Richtigkeit 14.11.24 Kontaktaufnahme nicht erfolgreich - Automatisierung ausführen, ur 22.11.24	PV Vertrieb	OP-105 Unterschriebener Lieferungs- oder Leistungsvertrag
<input type="checkbox"/>	OP-216	Prüfung der Daten auf Richtigkeit und Plausibilität	PV Vertrieb B2C	OP-216 Photovoltaik-Anlage Teil 1 (Leadgenerierung) 2024
<input type="checkbox"/>	OP-173	Prüfen, ob Hardware bestellt werden muss	Ladesäulen Vertrieb	OP-173 B2B Ladesäulen
<input type="checkbox"/>	OP-175	Überprüfe die Bestellung auf Vollständigkeit der Kundendaten und D in 8 days Durchführung der Bonitätsprüfung in 8 days	Ladestrom Wallbox B2	OP-175 B2B Ladesäulen

Roadmap Ausblick

Notizen auf E-Mails

The screenshot displays the epilot CRM interface, which is designed to integrate customer communication channels. The main view is a 'My inbox' for 'Darrell Steward' with a subject line 'R: Repair'. The interface is divided into several sections:

- Left Sidebar:** A navigation menu with icons for Dashboard, Opportunities, Orders, Contacts, Accounts, Contracts, Submissions, and Meters.
- Top Bar:** Contains navigation tabs for 'Customer Relations', 'Configuration', and 'Cooperations', along with a search bar and utility icons for mail, folders, settings, and notifications.
- Main Content Area:**
 - Left Panel (Email List):** A list of email threads with details like sender (e.g., 'Darrell Steward'), subject ('R: Repair'), and status icons.
 - Center Panel (Email Content):** Displays the selected email's content, including a 'Delivery Status Notification' and a comment from 'Joseph Reiner' stating: 'Technician successfully installed the house connection for Mrs. Müller. She was informed that the connection is now operational. She requested a confirmation of completed work by email.'
 - Right Panel (Notes):** A 'Notes' window that mirrors the email content, allowing for additional annotations and actions like 'Add label' and 'Email thread'.
- Bottom Panel (Email Thread):** Shows a detailed view of an email thread with a subject 'Subject: Unsere letzte auftrag', sender 'Frank Duras', and recipient 'James Frost'. It includes a 'Add label' button and navigation arrows.

At the bottom of the interface, there is a footer with the text 'epilot test internal *org 66* (66)', '© Copyright epilot 2025', and links for 'Imprint', 'Privacy Policy', and 'Terms and Conditions'.

Activity Feed innerhalb des E-Mail-Verlaufs

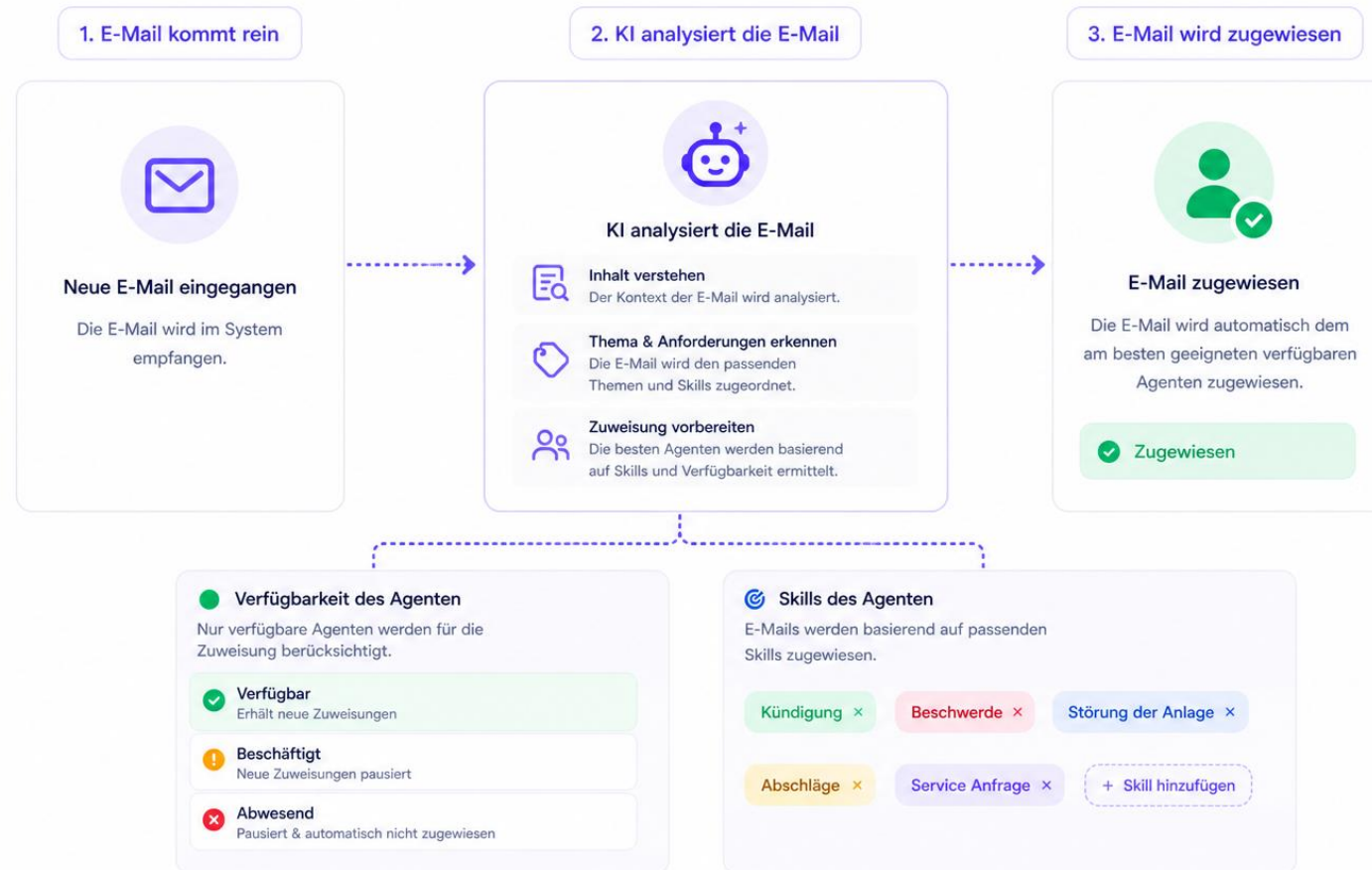
The screenshot displays a CRM email client interface. The top navigation bar includes 'Customer Relations', 'Configuration', and 'Cooperations', along with a search bar and utility icons. A left sidebar contains navigation options like 'Dashboard', 'Opportunities', 'Orders', 'Contacts', 'Accounts', 'Contracts', 'Submissions', and 'Meters'. The main content area is divided into three sections:

- My inbox:** A list of email folders including 'Assigned to me' (2), 'Favorites', 'Sent', 'Drafts', 'Views' (Urgent, Cologne), and 'Shared inboxes' (All mail, Unlinked, Organization, Meter readings, Sales, Support). A 'Write Email' button is located at the bottom of this section.
- Delivery Status Notification:** A detailed view of an email with the subject 'Subject: Unsere lätzte auftrag'. It shows the sender 'Frank Duras' and recipient 'James Frost'. The email body contains placeholder text 'Lorem ipsum dolor...' and a list of actions: 'Opportunity linked by Michael Scott', 'Meter linked by Michael Scott', 'Label "Huawei-Aktion" added by Michael Scott', and 'Moved to Support by [icon] Linked with keyword'. A 'Show less' button is present.
- Activity Feed:** A list of recent email interactions with the following entries:
 - Darrell Steward** (22.11.2023): R: Repair. Hello, I'm having trouble using a feature on the site... (4 replies)
 - Jerome Bell** (22.11.2023): R: Incident on the document... Hello, I'm having trouble using a feature on the site... (4 replies)
 - Bessie Cooper** (22.11.2023): Intervention. Hi, I'm having trouble setting up my account. Can y... (3 replies)
 - Darlene Robertson** (22.11.2023): R: Intervention. Hey, I accidentally unsubscribed from your newslet... (3 replies)
 - Kristin Watson** (22.11.2023): R: Order_017926. Hi, I accidentally deleted some important files from... (5 replies)
 - Eleanor Pena** (22.11.2023): Order_027715. Hi, I'm trying to make a purchase but I'm getting an... (2 replies)
 - Theresa Webb** (22.11.2023): R: Installation assistance. Hello, I'm interested in upgrading my account to a... (2 replies)
 - Floyd Miles** (22.11.2023): [Partial entry]

Automatische Zuweisung von E-Mails

Automatische Zuweisung von E-Mails

KI analysiert Inhalte, berücksichtigt Verfügbarkeit und Skills – und findet den richtigen Agenten.



Entitäten im Kanban Board

Kanban Board

Energy sector task management

- Backlog** (2)
 - T-1039: Schedule site inspection (HD, Apr 14)
 - T-1040: Check EnWG compliance (MK, Apr 15)
- To Do**
 - T-1038: Send grid connection request (LS)
 - T-1035: Upload permit documents (AW)

Schedule site inspection

Helya Doering | Apr 14 | Medium

Description: Coordinate with the EnWG Energie Dresden facility manager to schedule an on-site inspection. Confirm roof load capacity and cable routing before installation.

Task Notes: Facility manager available Apr 16-18. Need to confirm with our installation crew. (HD • Apr 8)

Write note

Linked Entity: Status: Qualification; Shared With: Vattenfall; Power: 120 kWp

Open entity | Mark as done

Kanban Board

Energy sector task management

- Backlog** (2)
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Attributes

Search attributes... | Filter by label

PINNED FIELDS

Opportunity Stage: Qualification

Probability: 50%

Expected Close Date: Jun 30, 2026

ALL ATTRIBUTES

Contact Information | Location & Installation | Administrative

Show more attributes

Offene Fragen & Feedback

Produkttester

**Du möchtest Produkttester werden?
Dann registriere dich hier!**



Offene Fragen & Feedback

- ✓ Was habe ich heute gelernt?
- ✓ Wo gibt es noch offene Fragen?
- ✓ Was ist euer Feedback zu den Funktionalitäten?
- ✓ Wurden Eure Erwartungen des Workshops erfüllt?
- ✓ Was können wir beim nächsten Mal besser machen?

Feedback



Linda Rohde

Senior Onboarding Manager
linda.rohde@epilot.cloud

Let's connect
on LinkedIn



Alexandra Kail

Onboarding Manager
alexandra.kail@epilot.cloud

Let's connect
on LinkedIn



**Wie hat dir der Workshop
gefallen? Dein Feedback zählt!**



Feedback



Linda Rohde

Senior Onboarding Manager
linda.rohde@epilot.cloud

Let's connect
on LinkedIn



Alexandra Kail

Onboarding Manager
alexandra.kail@epilot.cloud

Let's connect
on LinkedIn



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