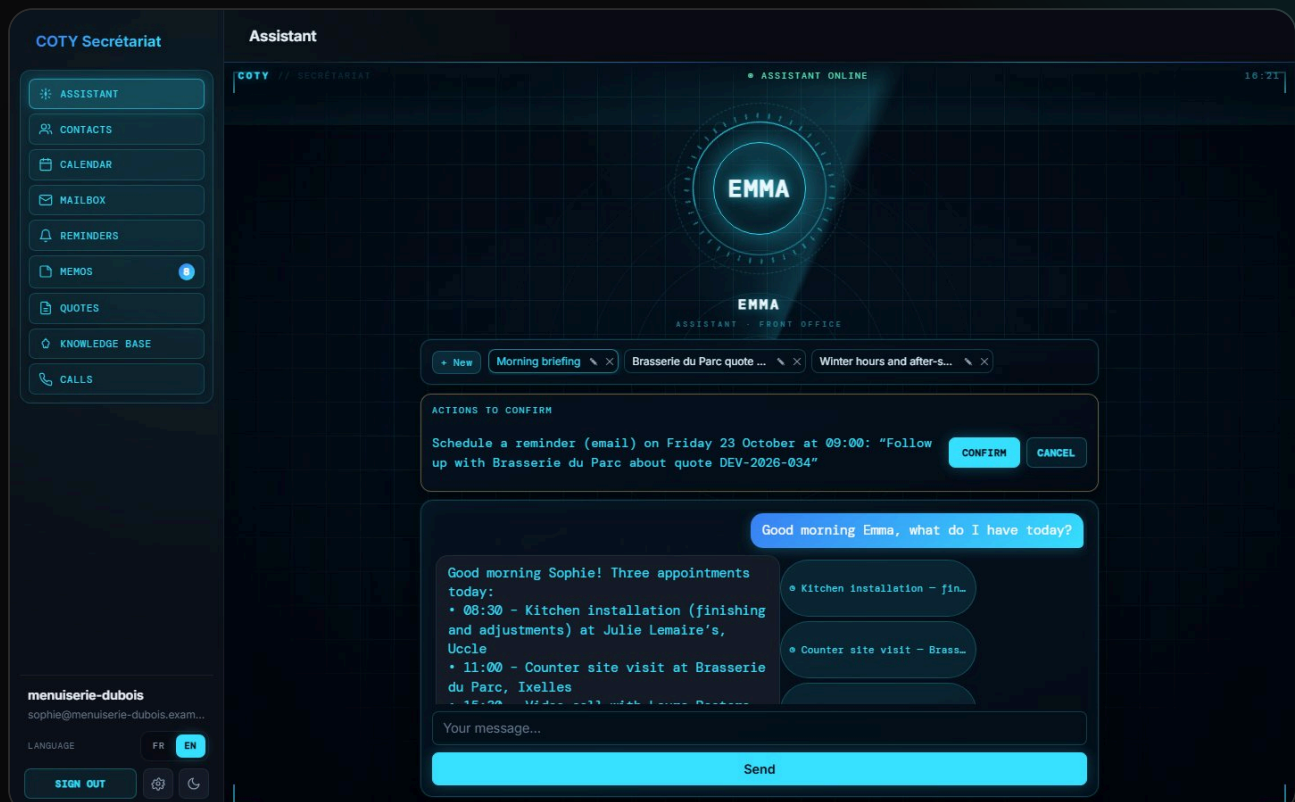


## USER GUIDE

# COTY Secrétariat

Your AI secretary: she sorts your email, keeps your calendar, prepares your quotes and answers the phone — and always asks for your approval before acting.



# Contents



## 01 Overview

What COTY Secrétariat does, and what it never does without you

---

## 02 Creating your account and signing in

Personal address, two-factor authentication, signing out

---

## 03 Getting to know the interface

Menu, settings, light or dark theme, language

---

## 04 The assistant

Conversations, topics, actions to confirm, quick notes

---

## 05 Contacts

---

## 06 Calendar

---

## 07 Mailbox

Read, sort, reply, forward, drafts

---

## 08 Reminders

---

## 09 Memos

---

## 10 Quotes

---

## 11 Knowledge base

Your business's memory

---

## 12 Calls and phone reception

---

## 13 Settings

Assistant, notifications, mailbox, company, telephony

---

## 14 Security and privacy

---

## 15 FAQ and troubleshooting

---

## 16 Support

---

## CHAPTER 01

# Overview

COTY Secrétariat is a virtual secretary for small businesses. You talk to her as you would to a colleague: she checks your email, calendar, contacts and quotes, then prepares the work. You stay in control of everything that goes out.

## What she does for you

| AREA                | EXAMPLES                                                                           |
|---------------------|------------------------------------------------------------------------------------|
| Mailbox             | Summarise pending messages, prepare a reply, forward, archive.                     |
| Calendar            | Tell you what is coming up, suggest a slot, book an appointment.                   |
| Contacts            | Find a phone number, create or complete a client record.                           |
| Quotes              | Prepare a quote with Belgian VAT, send it as a PDF, track its status.              |
| Reminders and memos | Schedule a reminder by email or text message, note a phone message, create a task. |
| Phone               | Answer, inform the caller, take a message, suggest an appointment.                 |
| Knowledge base      | Remember your opening hours, prices and work habits to answer better.              |

### TRUST FIRST

By default, anything that **sends** or **deletes** something (an email, a quote, a confirmed appointment) waits for your go-ahead in the "Actions to confirm" panel. Each business's data is isolated: nobody else can access it.

## What you need

- A recent browser (Chrome, Edge, Firefox or Safari) on a computer, tablet or smartphone.
- An authenticator app on your phone (Google Authenticator, Microsoft Authenticator, Authy...).
- Your business mailbox (Gmail, Outlook / Microsoft 365, OVH or any other host).

## CHAPTER 02

# Creating your account and signing in

Each business has its own address, for example `pme.coty.agency/dubois-joinery`. Signing in is protected by a password and a 6-digit code that changes every 30 seconds.

## Create your account

- 1 Open the sign-in page and choose the **Create an account** tab.
- 2 Enter your **business name**: it becomes your personal address (shown just below).
- 3 Enter your **email** and a **password** of at least 10 characters, with at least one letter and one digit.
- 4 A QR code appears: scan it with your authenticator app.
- 5 Type the 6-digit code shown by the app, then confirm. Your account is ready.



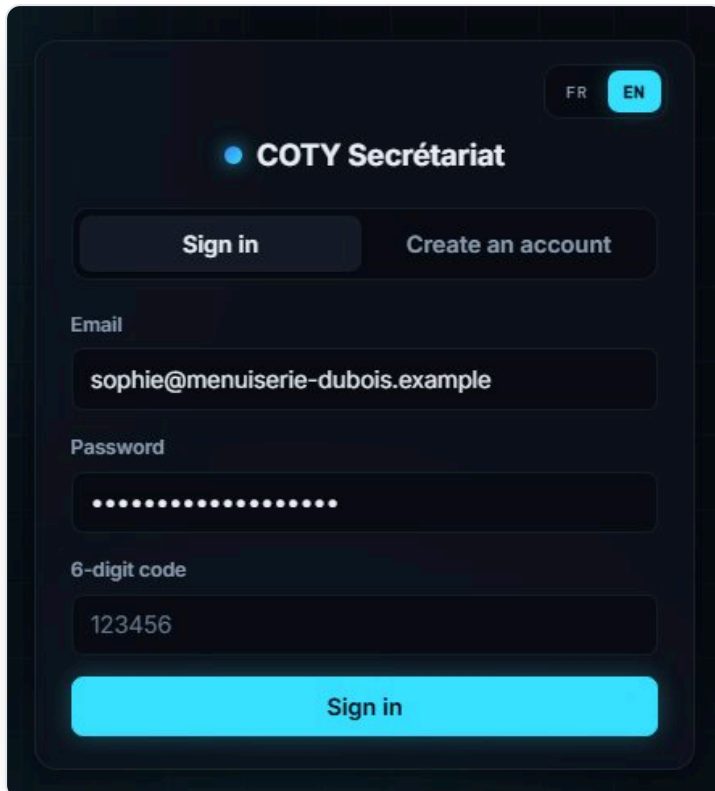
**Two-factor authentication.** Scan the QR code once; the app then generates your codes.

**IMPORTANT**

Keep your phone (or a backup of your authenticator app) safe. If you lose it, contact support to reset your two-factor authentication.

## Signing in

- 1 **Sign in** tab: enter your email and password.
- 2 Open your authenticator app and type the **6-digit code**.
- 3 Click **Sign in** : you land on the assistant's page.

The screenshot shows a dark-themed sign-in interface for 'COTY Secrétariat'. At the top right, there are language toggle buttons for 'FR' and 'EN', with 'EN' selected. Below the header, there are two buttons: 'Sign in' and 'Create an account'. The 'Sign in' button is highlighted. Below these buttons are three input fields: 'Email' with the value 'sophie@menuiserie-dubois.example', 'Password' with masked characters (dots), and '6-digit code' with the value '123456'. At the bottom, there is a large blue 'Sign in' button.

Sign-in screen. Email, password and security code.

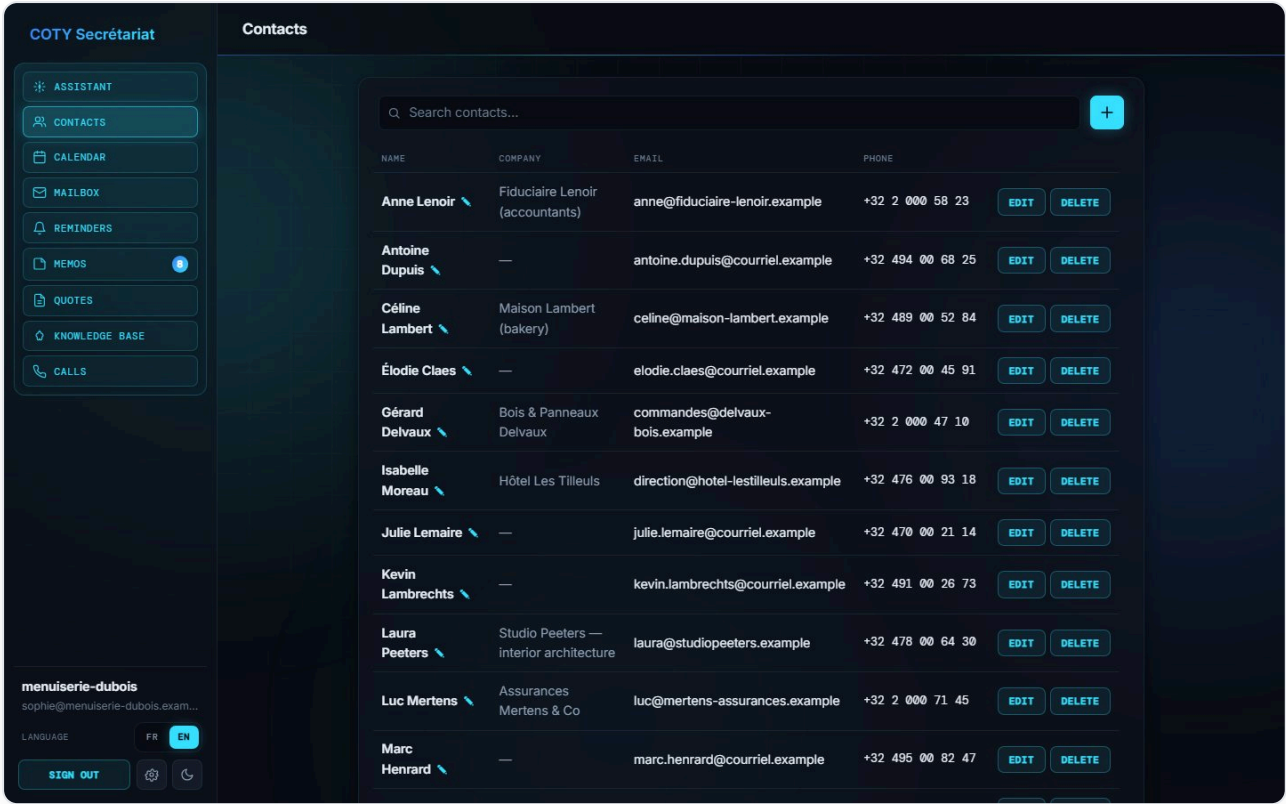
## Signing out

At the bottom of the left menu, click **Sign out** . Remember to do so on a shared computer.

CHAPTER 03

# Getting to know the interface

The screen has a menu on the left and the work area on the right.



Overview. The menu stays visible on every page.

## The menu

| ENTRY          | WHAT IT IS FOR                                               |
|----------------|--------------------------------------------------------------|
| Assistant      | Chat with your assistant and approve her actions.            |
| Contacts       | Your address book of clients and suppliers.                  |
| Calendar       | Your appointments, by day, week or month.                    |
| Mailbox        | Your emails, to handle or handled, and your drafts.          |
| Reminders      | Messages scheduled by email, text message or WhatsApp.       |
| Memos          | Messages taken for you and tasks to do.                      |
| Quotes         | Creating, sending and tracking your quotes.                  |
| Knowledge base | Your business knowledge (opening hours, prices, procedures). |
| Calls          | The log of calls received by phone reception.                |

## The bottom of the menu

- Your **workspace name** and the email of the signed-in account.
- The **gear wheel** opens the settings menu: Assistant settings, Notifications & reminders, Mailbox, My business (quotes), Telephony, or All settings.
- The **sun / moon** button switches between dark and light themes; your choice is remembered.
- The **FR | EN** switch changes the interface language instantly; it is also remembered.
- The [Sign out](#) link.

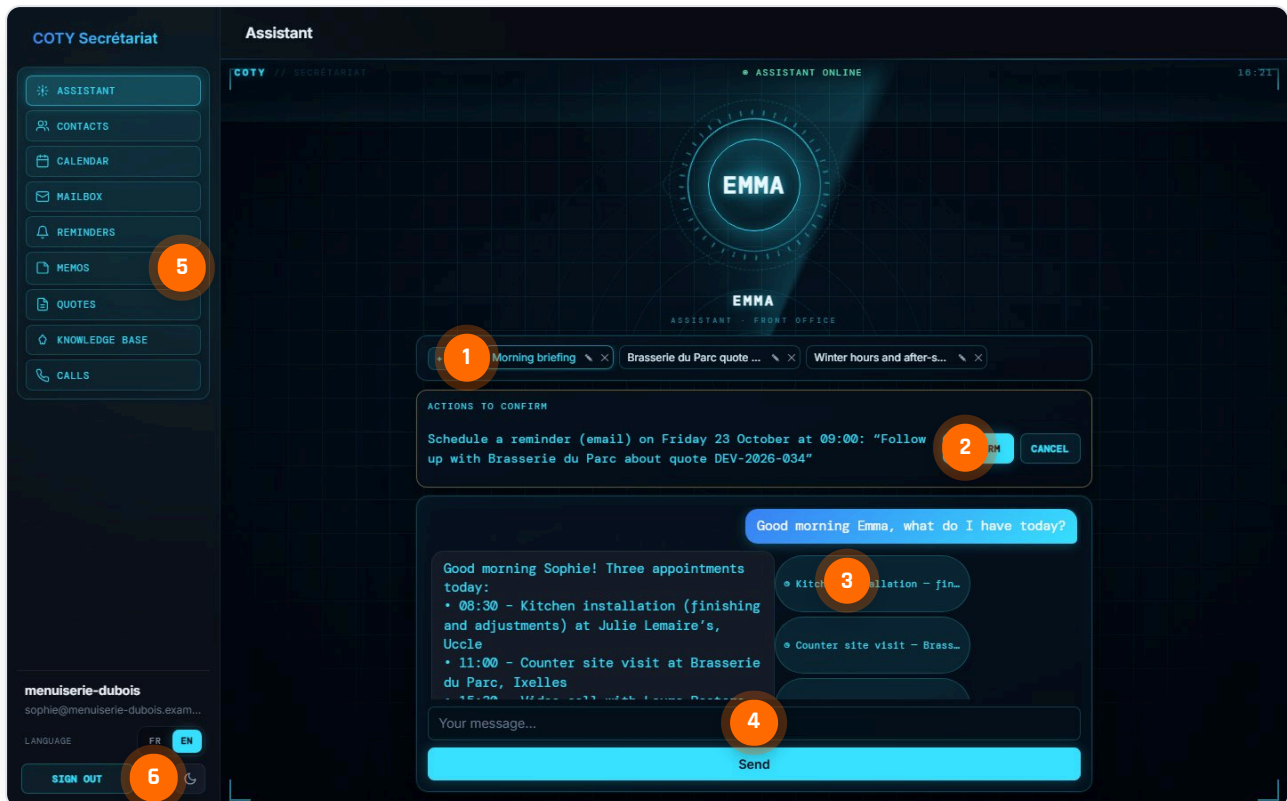
### TIP

The counter next to **Memos** shows how many memos are still open: one glance tells you whether anything is left to handle.

## CHAPTER 04

# The assistant

This is the heart of COTY Secrétariat. Write to your assistant as you would to a colleague: she understands everyday language, fetches the information from your tools and answers within seconds — in the language of your interface.



The Assistant page.

- 1 **Conversations:** new conversation, resume, rename, delete.
- 2 **Actions to confirm:** nothing goes out without your click.
- 3 **Topics cited:** one click opens the item's summary.
- 4 **Your message:** write as you would to a colleague.
- 5 **Counter** of open memos.
- 6 **Settings** (gear wheel) and light / dark theme.

## Asking a question or giving an instruction

Type your message in the **Your message...** field and press **Enter**. A few examples:

| YOU WRITE                               | SHE DOES                                             |
|-----------------------------------------|------------------------------------------------------|
| "What do I have tomorrow?"              | Lists tomorrow's appointments.                       |
| "Summarise the emails I need to handle" | Summarises the pending emails, most important first. |

|                                                           |                                                       |
|-----------------------------------------------------------|-------------------------------------------------------|
| "Which quotes are pending?"                               | Lists quotes sent without a reply, with their amount. |
| "Who called today?"                                       | Summarises today's calls and the messages left.       |
| "Book an appointment with Mr Renard on Thursday at 10 am" | Prepares the appointment and asks you to confirm.     |
| "Remind me to call the accountant on Friday at 9 am"      | Prepares a reminder and asks you to confirm.          |

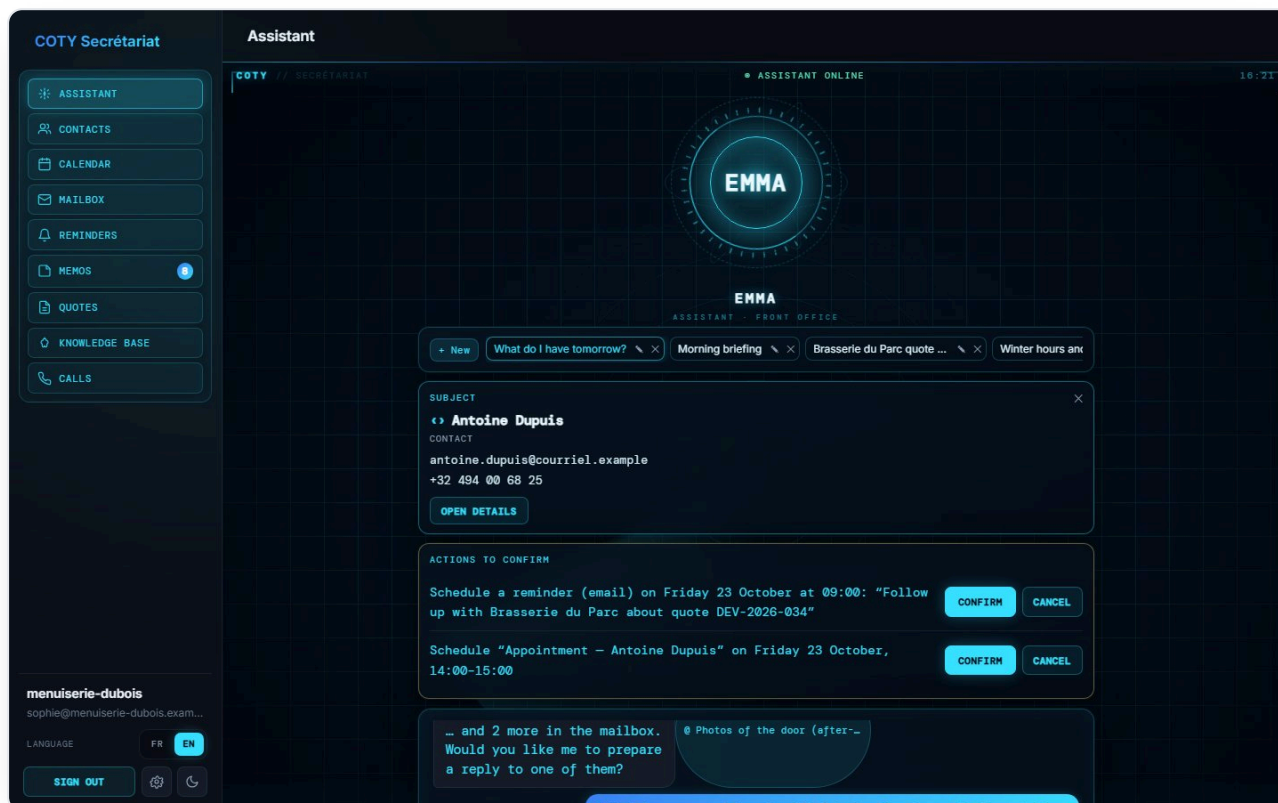
## Topics cited

Under each answer, small tags recall the items she used: a contact, an email, a quote, an appointment, a memo or a knowledge-base card. Click a tag to show its summary in the **Topic** panel, then **Open details** to go straight to the item.

## Actions to confirm

When the assistant wants to **create, send or delete** something, she does not do it right away: the action appears in the **Actions to confirm** panel, with a clear description.

- **Confirm** carries out the action immediately (the appointment is booked, the reminder scheduled...).
- **Cancel** drops it: nothing is done.



An action awaiting confirmation. Nothing goes out until you click "Confirm".

**AUTONOMOUS MODE**

If you would rather the assistant act without asking, turn on **autonomous mode** in

**Settings** → **Assistant settings**. We recommend keeping “approval” mode for the first few weeks.

## Conversations

- **+ New** opens a blank conversation (handy for changing the subject).
- Click a conversation in the list to pick it up where you left off.
- The pencil lets you **rename** it, the bin **delete** it.

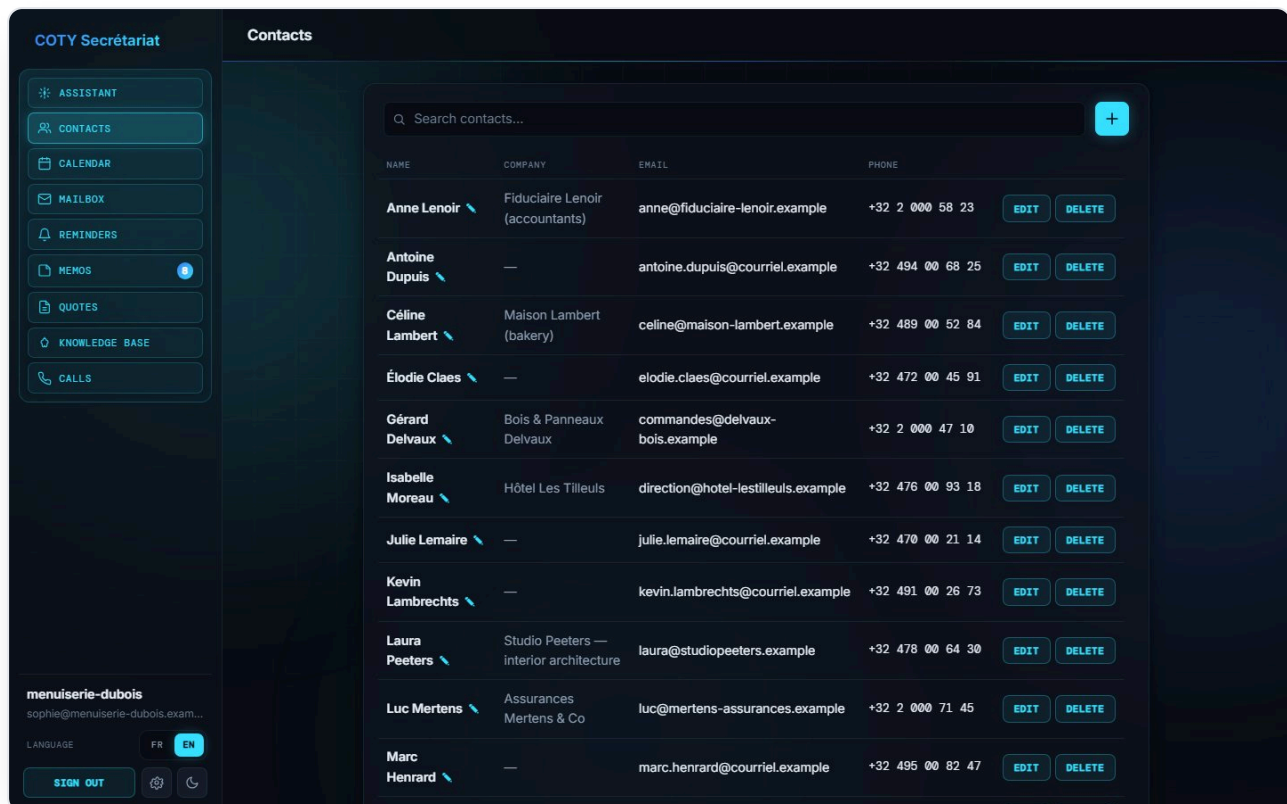
## Quick notes

Below the conversation, the **Quick notes** card works as a reminder pad: one line, **Enter**, done. These notes stay private to your workspace.

## CHAPTER 05

# Contacts

Your address book. The assistant uses it to find a client, pre-fill a quote or attach a phone message.



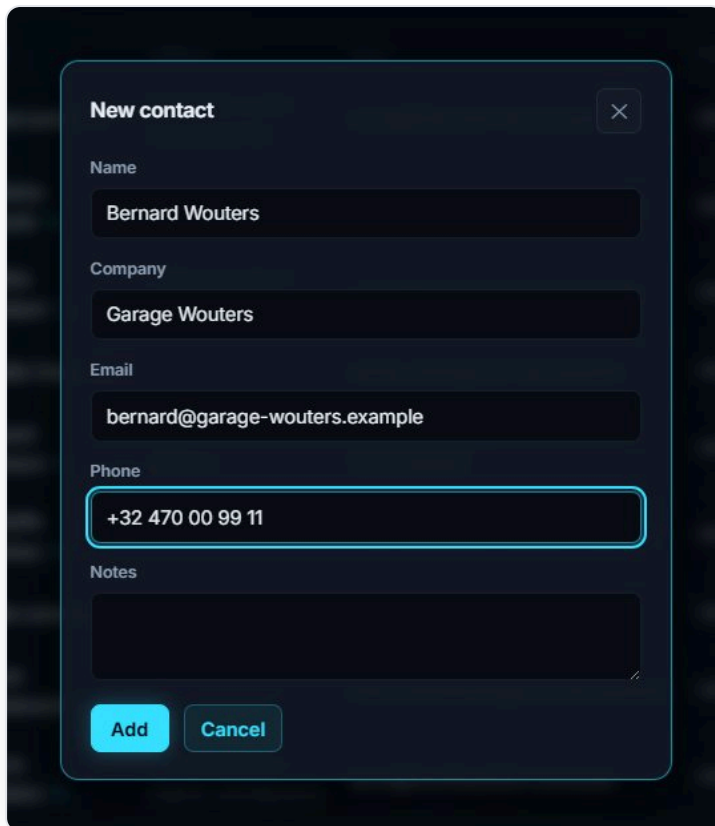
The contact list. Name, company, email and phone.

## Searching

Type a few letters in **Search contacts...** : the list filters on name, company, email or phone.

## Adding or editing a contact

- 1 Click the **+** button at the top right (or an existing row to edit it).
- 2 Fill in the **name** (required), company, email, phone and free notes.
- 3 Click **Add** (or **Save** when editing).



**New contact** ✕

Name  
Bernard Wouters

Company  
Garage Wouters

Email  
bernard@garage-wouters.example

Phone  
+32 470 00 99 11

Notes

**Add** **Cancel**

**Contact record.** Only the name is required.

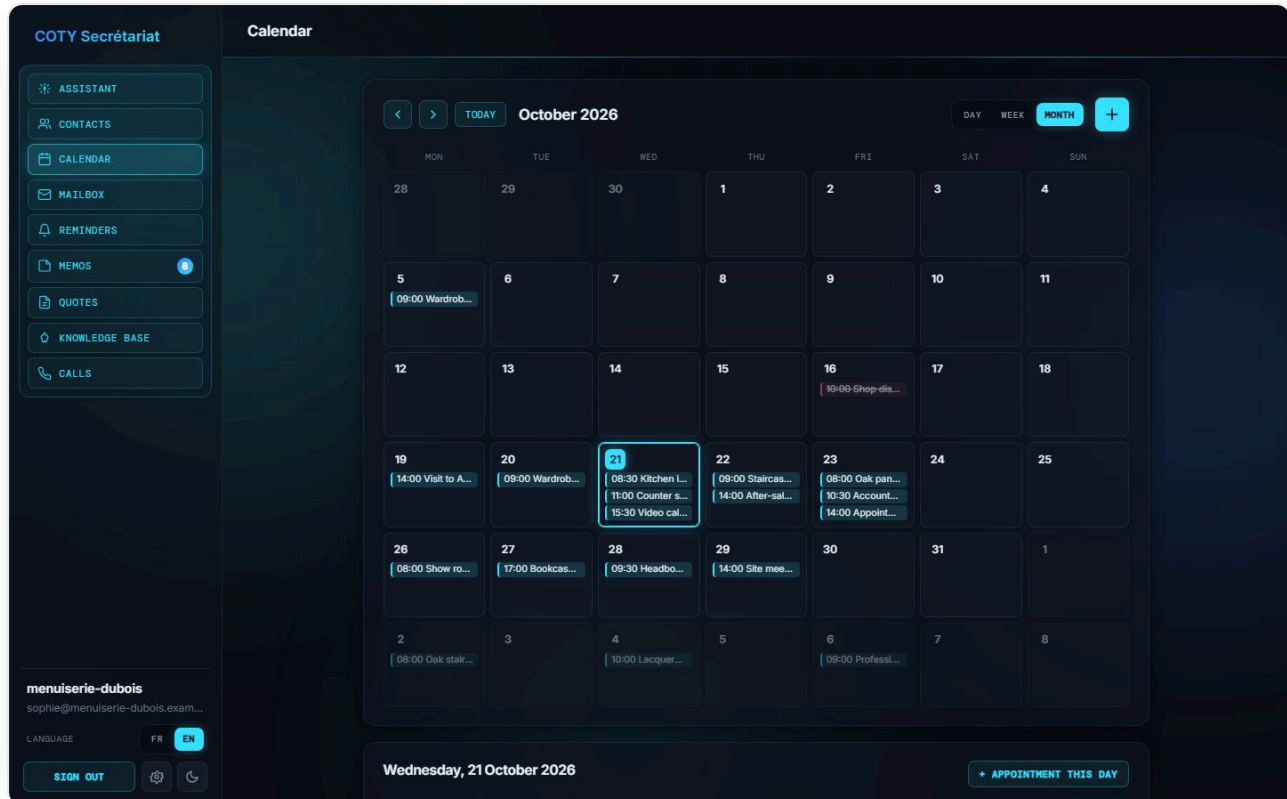
**TIP**

Just write to the assistant "Add Julie Martin, Park Bakery, 0478 12 34 56": she prepares the record and asks you to confirm.

## CHAPTER 06

# Calendar

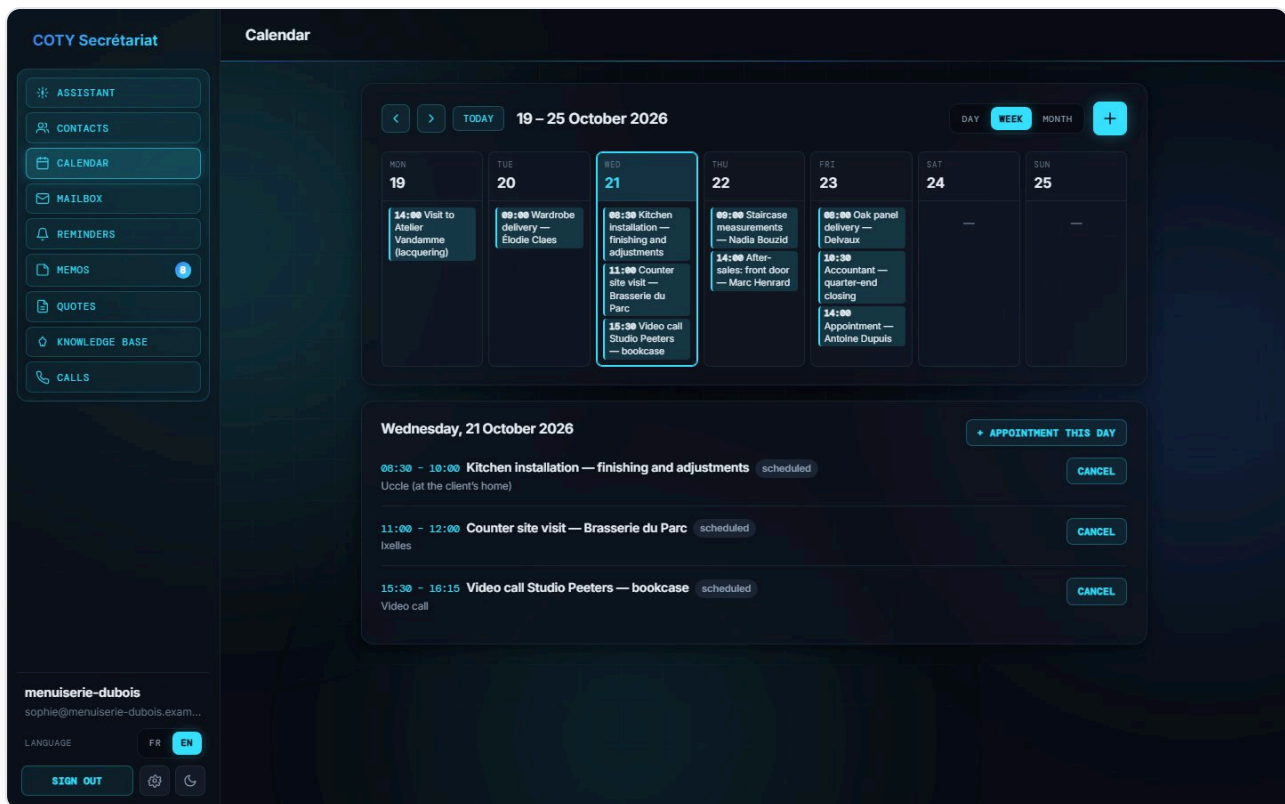
All your appointments, those you book yourself and those the assistant suggests.



**Month view.** Click a day to show its details on the right.

## Navigating

- Choose the **Day**, **Week** or **Month** view.
- The **<** **>** arrows move forward or back; **Today** returns to the current date.
- The right-hand panel details the selected day: time, title, location.



Week view. Ideal for planning the week on Monday morning.

## Adding an appointment

- 1 Click **+** (or the "+" on a specific day).
- 2 Enter the **title**, **start**, **end** and, if needed, the **location**.
- 3 Click **Add**.

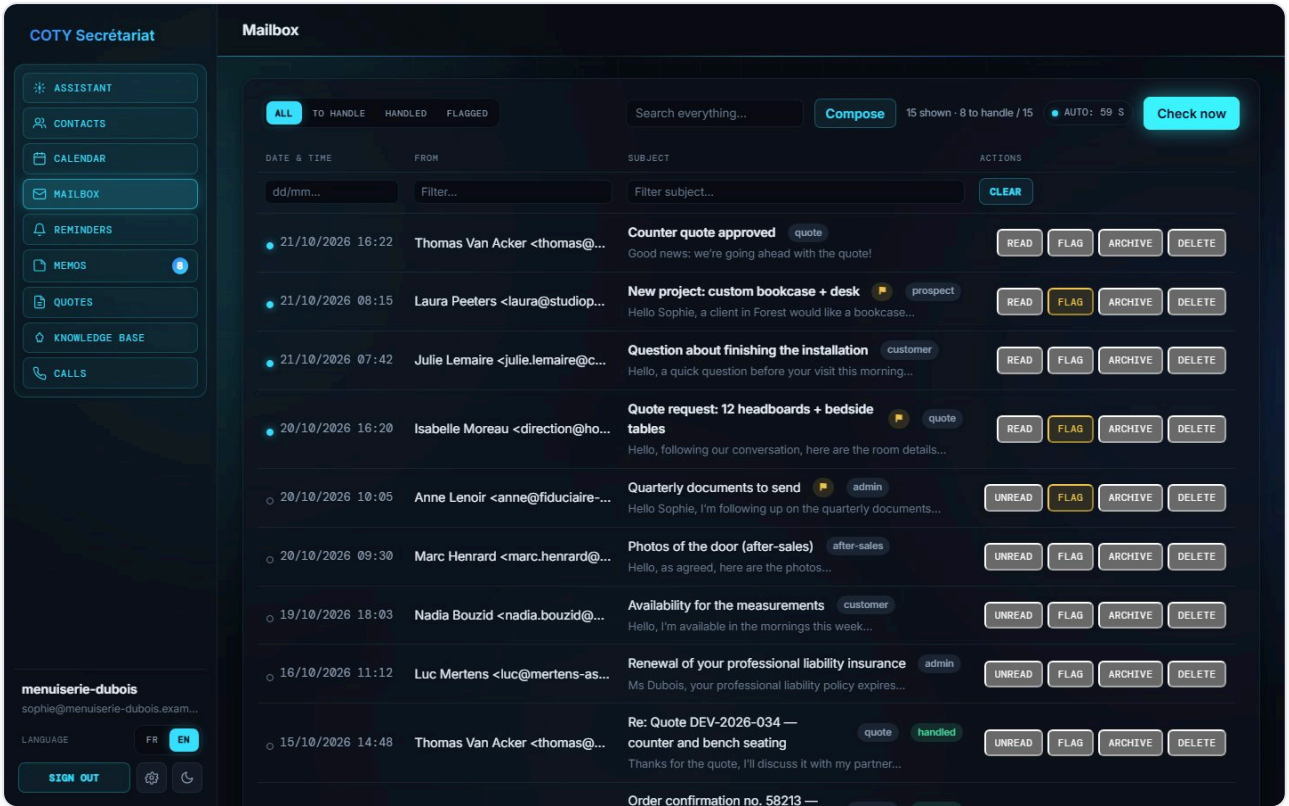
## Suggested appointments

An appointment taken over the phone by the assistant shows the status **proposed**: it still needs your approval. To cancel an appointment, open the day and click **Cancel**.

CHAPTER 07

# Mailbox

COTY Secrétariat checks your business mailbox every 60 seconds. You follow what is to **handle** and what is **handled**, without leaving the app.



The mailbox. Filters at the top, column filters in the table header.

## Sorting and finding an email

- The **All**, **To handle**, **Handled** and **Flagged** filters show the right batch of messages, with their count.
- **Search everything...** searches the date, sender, subject and message preview.
- The fields under the column titles filter by **date**, **sender** or **subject**.
- The countdown shows the next check; **Check now** checks immediately.

## Actions on each row

| ACTION                      | EFFECT                                                  |
|-----------------------------|---------------------------------------------------------|
| <b>Read</b> / <b>Unread</b> | Changes the read status.                                |
| <b>Flag</b>                 | Flags the message so you can find it in "Flagged".      |
| <b>Archive</b>              | Removes the message from the list, without deleting it. |

**Delete**

Moves the message to the trash, after confirmation.

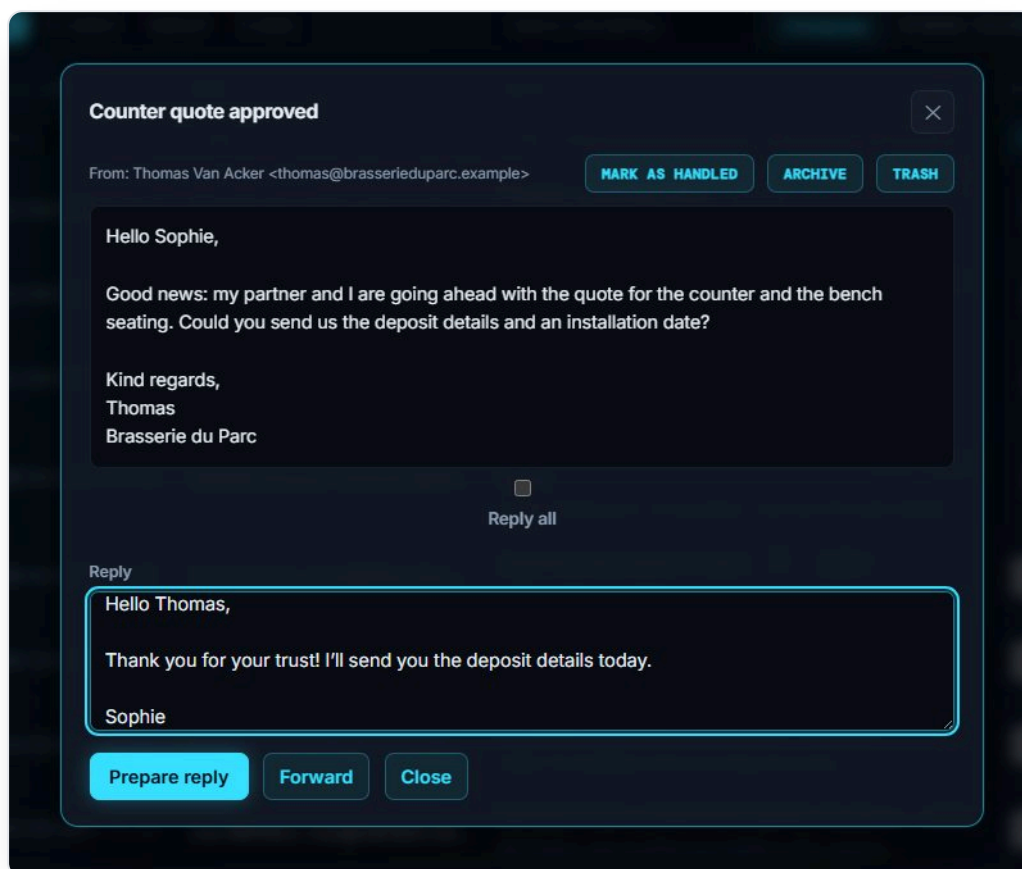
## Reading, replying and forwarding

Click a message to open it: it is automatically marked as read.

- 1 Write your text in **Reply** . Tick **Reply all** to include the people in copy.
- 2 Click **Prepare reply** : the reply is saved as a **draft**.
- 3 To forward, click **Forward** , enter the recipient and an optional note, then **Create forward draft** .
- 4 **Mark as handled** files the message once the matter is settled; **Archive** and **Trash** are also available here.

### NOTHING GOES OUT WITHOUT YOU

Replies, forwards and new messages always go through the **Drafts** section, below the list: review them, then click **Send** .



Reading an email. Reply, forward and file it in one place.

## Writing a new message

**Compose** opens the **New message** window (To, Cc, Bcc, subject, message). **Create draft** saves it as a **draft**: find it in the **Drafts** section below the list and click **Send** when it is ready.

COTY Secrétariat

ASSISTANT

CONTACTS

CALENDAR

MAILBOX

REMINDERS

MEMOS

QUOTES

KNOWLEDGE BASE

CALLS

menuiserie-dubois

sophie@menuiserie-dubois.exam...

LANGUAGE

FR

EN

SIGN OUT

Mailbox

ALL TO HANDLE HANDLED FLAGGED

Search everything...

Compose

15 shown · 8 to handle / 15

AUTO: 53 s

Check now

| DATE & TIME      | FROM                              | SUBJECT                                                                                                                                                | ACTIONS                    |
|------------------|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|
| dd/mm/...        | Filter...                         | Filter subject...                                                                                                                                      | CLEAR                      |
| 21/10/2026 16:22 | Thomas Van Acker <thomas@...      | Counter quote approved <span>quote</span><br>Good news: we're going ahead with the quote!                                                              | UNREAD FLAG ARCHIVE DELETE |
| 21/10/2026 08:15 | Laura Peeters <laura@studiop...   | New project: custom bookcase + desk <span>prospect</span><br>Hello Sophie, a client in Forest would like a bookcase...                                 | READ FLAG ARCHIVE DELETE   |
| 21/10/2026 07:42 | Julie Lemaire <julie.lemaire@c... | Question about finishing the installation <span>customer</span><br>Hello, a quick question before your visit this morning...                           | READ FLAG ARCHIVE DELETE   |
| 20/10/2026 16:20 | Isabelle Moreau <direction@ho...  | Quote request: 12 headboards + bedside tables <span>quote</span><br>Hello, following our conversation, here are the room details...                    | READ FLAG ARCHIVE DELETE   |
| 20/10/2026 10:05 | Anne Lenoir <anne@fiduciaire-...  | Quarterly documents to send <span>admin</span><br>Hello Sophie, I'm following up on the quarterly documents...                                         | UNREAD FLAG ARCHIVE DELETE |
| 20/10/2026 09:30 | Marc Henrard <marc.henrard@...    | Photos of the door (after-sales) <span>after-sales</span><br>Hello, as agreed, here are the photos...                                                  | UNREAD FLAG ARCHIVE DELETE |
| 19/10/2026 18:03 | Nadia Bouzid <nadia.bouzid@...    | Availability for the measurements <span>customer</span><br>Hello, I'm available in the mornings this week...                                           | UNREAD FLAG ARCHIVE DELETE |
| 16/10/2026 11:12 | Luc Mertens <luc@mertens-as...    | Renewal of your professional liability insurance <span>admin</span><br>Ms Dubois, your professional liability policy expires...                        | UNREAD FLAG ARCHIVE DELETE |
| 15/10/2026 14:48 | Thomas Van Acker <thomas@...      | Re: Quote DEV-2026-034 — counter and bench seating <span>quote</span> <span>handled</span><br>Thanks for the quote, I'll discuss it with my partner... | UNREAD FLAG ARCHIVE DELETE |
| 15/10/2026 09:02 | Gérard Delvaux <commandes...      | Order confirmation no. 58213 — delivery on Thursday <span>supplier</span> <span>handled</span><br>Hello, we confirm your order of oak panels...        | UNREAD FLAG ARCHIVE DELETE |
| 14/10/2026 20:31 | Élodie Claes <elodie.claes@co...  | Thank you for the wardrobe! <span>customer</span> <span>handled</span><br>Hello, a big thank you to the whole team...                                  | UNREAD FLAG ARCHIVE DELETE |
| 13/10/2026 08:50 | Pieter Vandamme <pieter@atel...   | RAL colours confirmed? <span>supplier</span> <span>handled</span><br>Hello Sophie, could you confirm the colours...                                    | UNREAD FLAG ARCHIVE DELETE |
| 12/10/2026 12:17 | Kevin Lambrechts <kevin.lamb...   | Re: Oak staircase — deposit paid <span>customer</span> <span>handled</span><br>Hello, the 30% deposit was paid this morning...                         | UNREAD FLAG ARCHIVE DELETE |
| 09/10/2026 15:00 | Salon Habitat & Bois <info@sal... | Your exhibitor badges — 2027 edition <span>info</span> <span>handled</span><br>Your stand is confirmed (hall 3)...                                     | UNREAD FLAG ARCHIVE DELETE |
| 08/10/2026 10:40 | Sarah Willems <sarah@lespetit...  | Furniture for the new section <span>prospect</span> <span>handled</span><br>Hello, we're opening a baby section in January...                          | UNREAD FLAG ARCHIVE DELETE |

Drafts (4)

- Bookcase video call — Thursday sent

To: laura@studiopeeters.example

Hello Laura, Would a video call on Thursday at 10 am suit you? Sophie
- Re: Counter quote approved draft

To: thomas@brasserieuparc.example

Hello Thomas, Thank you for your trust! I'll send you the deposit details today. Sophie

SEND
- Re: Quarterly documents to send draft

To: anne@fiduciaire-lenoir.example

Hello Anne, Here are the quarterly documents: Delvaux invoices, expense reports and statements. I'll bring the originals to our meeting. Have a good day, Sophie

SEND
- Measurements — slot confirmation draft

To: nadia.bouzid@courriel.example

Dear Ms Bouzid, We confirm the measurements for your staircase on Thursday 22 October at 9 am. Please allow about an hour. Kind regards, The Menuiserie ...

SEND

**Drafts:** review, then send.

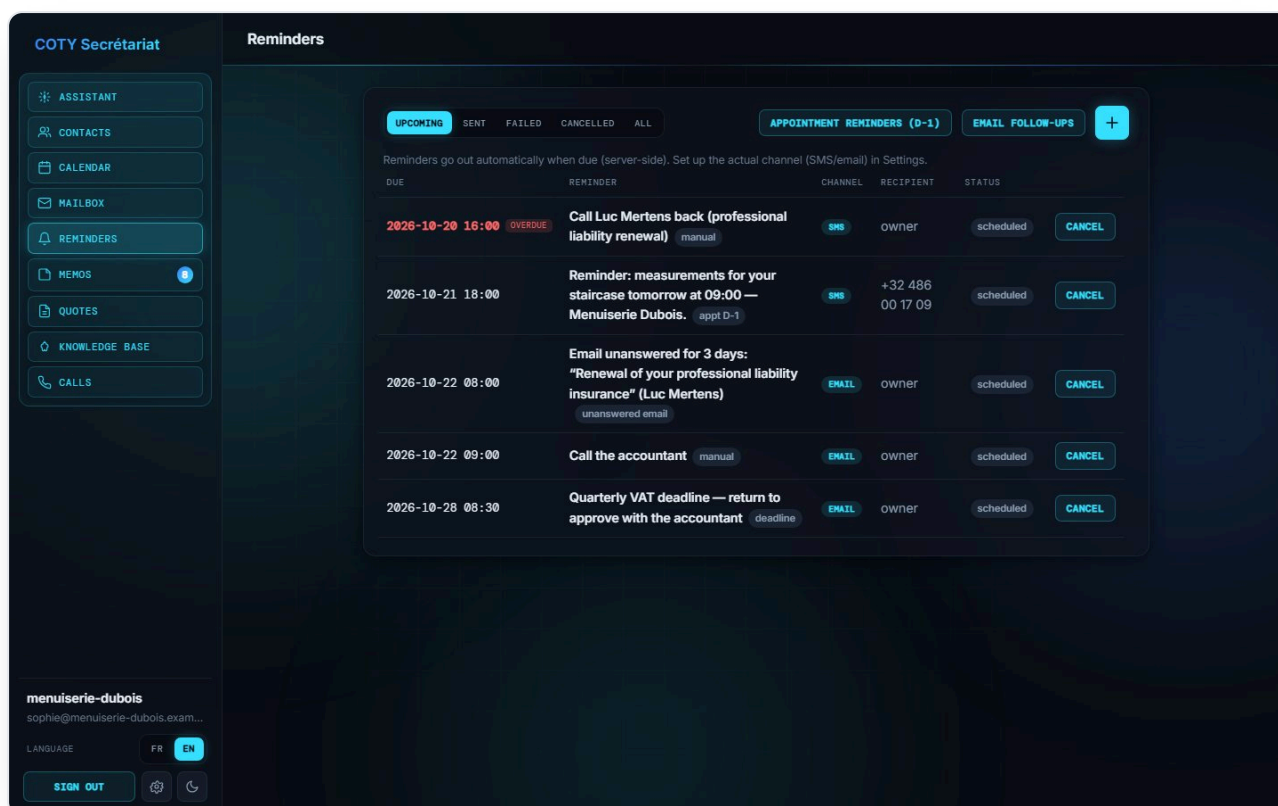
### MAILBOX DISCONNECTED

If a "Mailbox disconnected" banner appears (password changed, authorisation expired), click **Reconnect** and follow your provider's steps. No message is lost.

## CHAPTER 08

# Reminders

A reminder is a scheduled message that goes out by itself at the planned time, by email, text message or WhatsApp — for you or for a client.



Reminders, sorted by due date. Overdue reminders are flagged.

## Creating a reminder

- 1 Click **+**.
- 2 Write the **message**, choose the **channel** (email, text message, WhatsApp) and the **due date**.
- 3 Leave the **recipient** empty to send it to yourself; otherwise enter an email or a number.
- 4 Click **Schedule**.

## Automatic reminders

- **Appointment reminders (D-1)** schedules a reminder the day before each upcoming appointment linked to a contact.
- **Email follow-ups** sends you a reminder for each email left unhandled for 3 days.

## Tracking delivery

The **Upcoming**, **Sent**, **Failed**, **Cancelled** and **All** filters sort the reminders. An upcoming reminder can be **cancelled**; a failed reminder shows the reason (invalid number, for example) and can be **retried** in one click.

The screenshot displays the 'Reminders' section of the COTY Secrétariat application. On the left is a sidebar with navigation options: ASSISTANT, CONTACTS, CALENDAR, MAILBOX, REMINDERS (selected), MEMOS, QUOTES, KNOWLEDGE BASE, and CALLS. The main area shows a list of reminders under the 'FAILED' filter. Two reminders are listed:

| DUE              | REMINDER                                                                       | CHANNEL | RECIPIENT                           | STATUS                                                                                |
|------------------|--------------------------------------------------------------------------------|---------|-------------------------------------|---------------------------------------------------------------------------------------|
| 2026-10-16 18:00 | Reminder: visit to Atelier Vandamme tomorrow at 14:00. <small>appt D-1</small> | SMS     | owner                               | <b>failed</b> SMS not sent: no mobile number on the contact record. <b>RETRY</b>      |
| 2026-10-20 09:00 | Follow-up: show room schedule <small>manual</small>                            | EMAIL   | direction@hotel-lestilleuls.example | <b>failed</b> Address rejected by the recipient's server (mailbox full). <b>RETRY</b> |

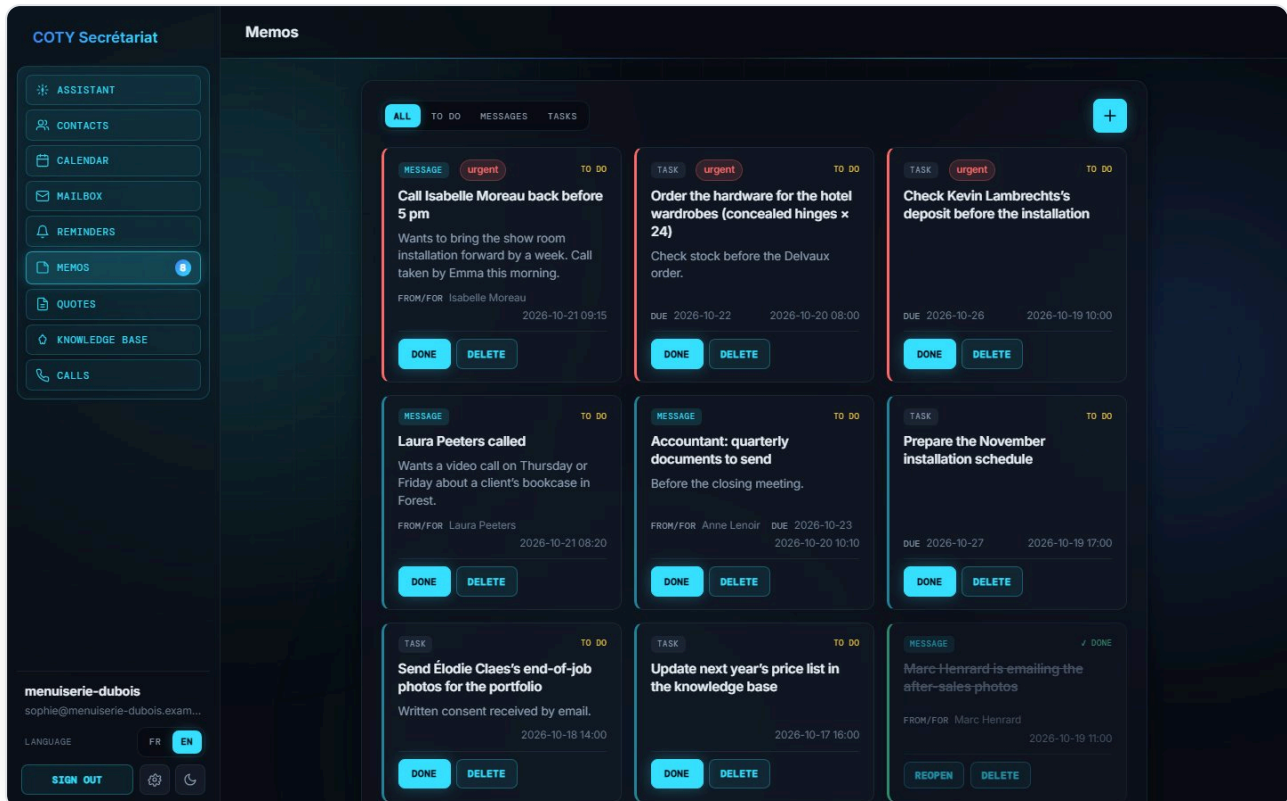
At the bottom left, the user profile for 'menuiserie-dubois' is shown with the email 'sophie@menuiserie-dubois.exam...'. There are also language selection buttons for FR and EN (selected), and a 'SIGN OUT' button.

**Failed** tab: the reason is shown, **Retry** sends the reminder again.

## CHAPTER 09

# Memos

The board of things not to forget: **messages** taken for you (on the phone in particular) and **tasks** to do.



**Memos.** Messages in cyan, tasks in grey, urgent items highlighted.

## Creating a memo

- 1 Click **+** and choose the type: **Task** or **Message for the boss**.
- 2 Choose the **priority** (normal or urgent) and write the **subject**.
- 3 For a message: choose the contact concerned or type the caller's name. For a task: add a due date if needed.
- 4 Click **Add**.

## Handling memos

Filter by **All**, **To handle**, **Messages** or **Tasks**. Click **Done** once it is settled (the menu counter goes down); **Reopen** puts it back in progress, **Delete** removes it.

## CHAPTER 10

# Quotes

Create clean, compliant quotes with Belgian VAT in a few clicks — or ask the assistant to do it.

| NUMBER       | CUSTOMER                                            | SUBJECT                                               | TOTAL INCL. VAT | STATUS   |
|--------------|-----------------------------------------------------|-------------------------------------------------------|-----------------|----------|
| DEV-2026-038 | Sarah Willems<br>Crèche Les Petits<br>Pas           | Baby section<br>furniture —<br>cubbies and<br>benches | €4,997.30       | draft    |
| DEV-2026-037 | Isabelle<br>Moreau · Hôtel<br>Les Tilleuls          | Headboards and<br>bedside tables<br>— 12 rooms        | €16,950.16      | draft    |
| DEV-2026-036 | Antoine Dupuis                                      | Under-stairs<br>bookcase                              | €5,421.37       | sent     |
| DEV-2026-035 | Céline Lambert<br>· Maison Lambert<br>(boulangerie) | Bakery display<br>stands                              | €4,026.88       | declined |
| DEV-2026-034 | Thomas Van<br>Acker · Brasserie<br>du Parc          | Bar counter and<br>bench seating                      | €15,795.34      | sent     |
| DEV-2026-033 | Julie Lemaire                                       | Light oak fitted<br>kitchen                           | €14,087.93      | accepted |
| DEV-2026-032 | Kevin<br>Lambrechts                                 | Quarter-turn<br>staircase in solid<br>oak             | €9,413.33       | accepted |

Quotes, with their number, client, subject, total incl. VAT and status.

## Creating a quote

- 1 Click **+**. The next number is assigned automatically.
- 2 Choose the **client** from your contacts or enter their name and email.
- 3 Enter the **subject** (e.g. "Made-to-measure wardrobe").
- 4 Add the **lines**: description, quantity, unit price excl. VAT, VAT rate (21% by default, editable per line: 6%, 12%...) and any discount in %. **+ Line** adds one.
- 5 Add your **terms** (validity, deposit...), check the estimated total, then **Create quote**. The quote is created as a **draft**.

New quote DEV-2026-039

Customer

Bernard Wouters (Garage Wouters)

Subject

Garage reception counter

| DESCRIPTION                     | QTY | UNIT € EXCL. | VAT % | DISC. % |              |
|---------------------------------|-----|--------------|-------|---------|--------------|
| Oak reception counter + storage | 1   | 2450         | 21    | 0       | <div>×</div> |
| Installation                    | 6   | 58           | 21    | 10      | <div>×</div> |

+ LINE

Estimated total excl. VAT: €2,763.20

Terms

E.g. quote valid for 30 days, 30% deposit...

Create quote

Cancel

The quote form. The total excl. VAT updates as you type.

### A quote's life cycle

| STATUS   | WHAT YOU CAN DO                                                                                                       |
|----------|-----------------------------------------------------------------------------------------------------------------------|
| Draft    | <div>Edit</div> , <div>Delete</div> , preview, send.                                                                  |
| Sent     | The client has received the PDF by email. Click <div>Accepted</div> or <div>Declined</div> depending on their answer. |
| Accepted | The quote is signed: time to deliver.                                                                                 |
| Declined | Kept in the history, for your statistics.                                                                             |

- Preview

 shows the quote exactly as the client will see it.
- PDF

 downloads the document.
- Send

 emails it to the client, PDF attached, after your confirmation.

**Menuiserie Dubois**

SRL  
Rue des Ébénistes 12, 1070 Anderlecht  
+32 2 000 12 34 · contact@menuiserie-dubois.example · www.menuiserie-dubois.example  
Company no. 0123.456.789 · VAT BE0123.456.789

**QUOTE**

DEV-2026-039

Date **21/10/2026**  
Valid until **20/11/2026**

PREPARED FOR  
**Bernard Wouters**  
Garage Wouters  
bernard@garage-wouters.example

**Subject:** Garage reception counter

| DESCRIPTION                     | QTY | UNIT PRICE EXCL. VAT | VAT | DISCOUNT | AMOUNT EXCL. VAT |
|---------------------------------|-----|----------------------|-----|----------|------------------|
| Oak reception counter + storage | 1   | €2,450.00            | 21% | —        | €2,450.00        |
| Installation                    | 6   | €58.00               | 21% | 10%      | €313.20          |
| Total excl. VAT                 |     |                      |     |          | <b>€2,763.20</b> |
| VAT 21% (base €2,763.20)        |     |                      |     |          | <b>€580.27</b>   |
| <b>Total incl. VAT</b>          |     |                      |     |          | <b>€3,343.47</b> |

- Quote valid for 30 days from its date of issue.
- 30% deposit on order, balance on completion of the work.
- 6% VAT subject to the client's certificate (home over 10 years old).

**Quote preview.** Your company header, lines, VAT per rate and legal mentions.

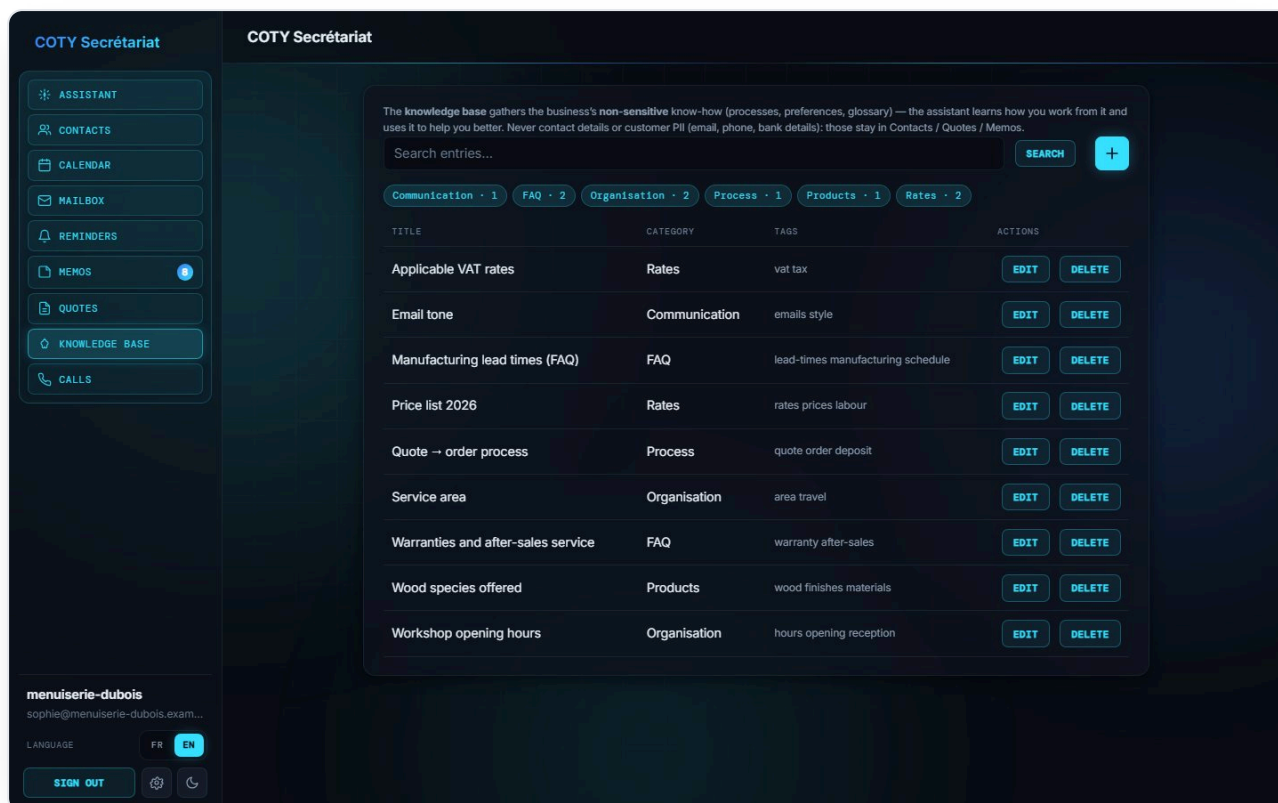
**TIP**

Fill in **Settings → My business** first: your company name, company number, VAT number and IBAN will appear automatically on all your quotes.

## CHAPTER 11

# Knowledge base

The knowledge base is your business's memory: opening hours, prices, procedures, habits. The assistant consults it to give the right answer — including on the phone — and adds to it when she learns something lasting.



Knowledge base cards, organised by category and tags.

## Adding a card

- 1 Click [+](#), give a **title** and a **category**.
- 2 Add **tags** (e.g. [clients](#), [prices](#) ) to find it easily.
- 3 Write the **content**. To link two cards, write the other card's title in double brackets: [\[\[Opening hours\]\]](#) .
- 4 Click [Create](#) .

### NO SENSITIVE DATA

The knowledge base automatically refuses email addresses, phone numbers, IBANs, VAT or card numbers. That information belongs in contacts and quotes, where it is encrypted.

## CHAPTER 12

# Calls and phone reception

When phone reception is on, the assistant picks up, answers out loud, takes a message or suggests an appointment. Every call is summarised here.

**COTY Secrétariat**

**Calls**

ACTIVE ARCHIVED REFRESH CONFIGURE

Log of incoming calls. The assistant picks up and answers; it takes a message or proposes an appointment (for you to approve). Turn it on in Settings → Telephony.

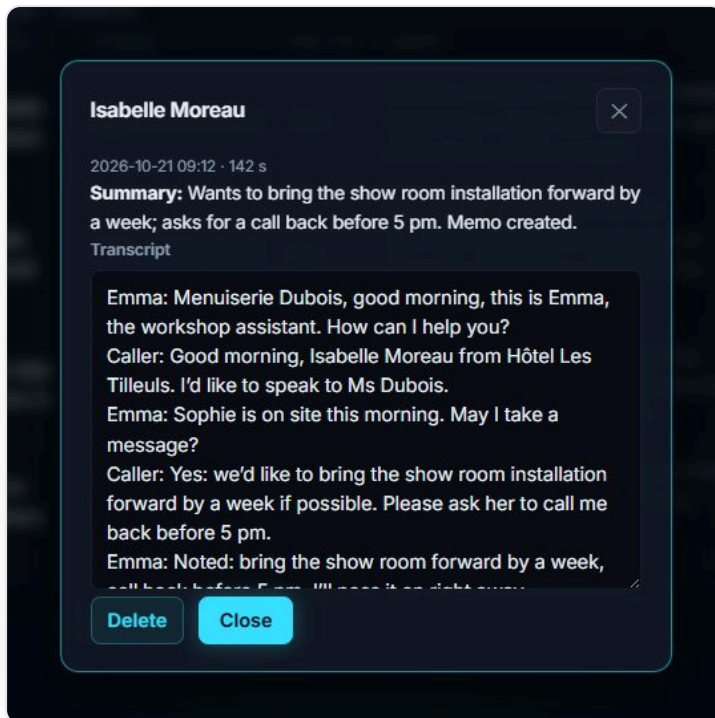
| CALLER           | STARTED          | DURATION | SUMMARY                                                                                                        |                                                                     |
|------------------|------------------|----------|----------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|
| Isabelle Moreau  | 2026-10-21 09:12 | 142 s    | Wants to bring the show room installation forward by a week; asks for a call back before 5 pm. Memo created.   | <a href="#">VIEW</a> <a href="#">ARCHIVE</a> <a href="#">DELETE</a> |
| Nadia Bouzid     | 2026-10-20 16:40 | 96 s     | Requests measurements for her staircase; appointment proposed on Thursday 22 October at 9 am (to be approved). | <a href="#">VIEW</a> <a href="#">ARCHIVE</a> <a href="#">DELETE</a> |
| +32 498 00 54 21 | 2026-10-20 11:05 | 48 s     | Asked about the workshop opening hours; answered (Mon-Fri 7:30 am-4:30 pm, Saturday by appointment).           | <a href="#">VIEW</a> <a href="#">ARCHIVE</a> <a href="#">DELETE</a> |
| Laura Peeters    | 2026-10-19 14:22 | 75 s     | Wants a video call on Thursday or Friday about a custom bookcase (client in Forest).                           | <a href="#">VIEW</a> <a href="#">ARCHIVE</a> <a href="#">DELETE</a> |

menuiserie-dubois  
sophie@menuiserie-dubois.exam...  
LANGUAGE FR EN  
SIGN OUT

The call log: caller, date, duration and summary.

## Reviewing a call

Click [View](#) to read the **summary** written by the assistant and the full **transcript** of the conversation. You can then **archive** it ( [Archived](#) tab) or **delete** it.



**Call details:** summary and transcript.

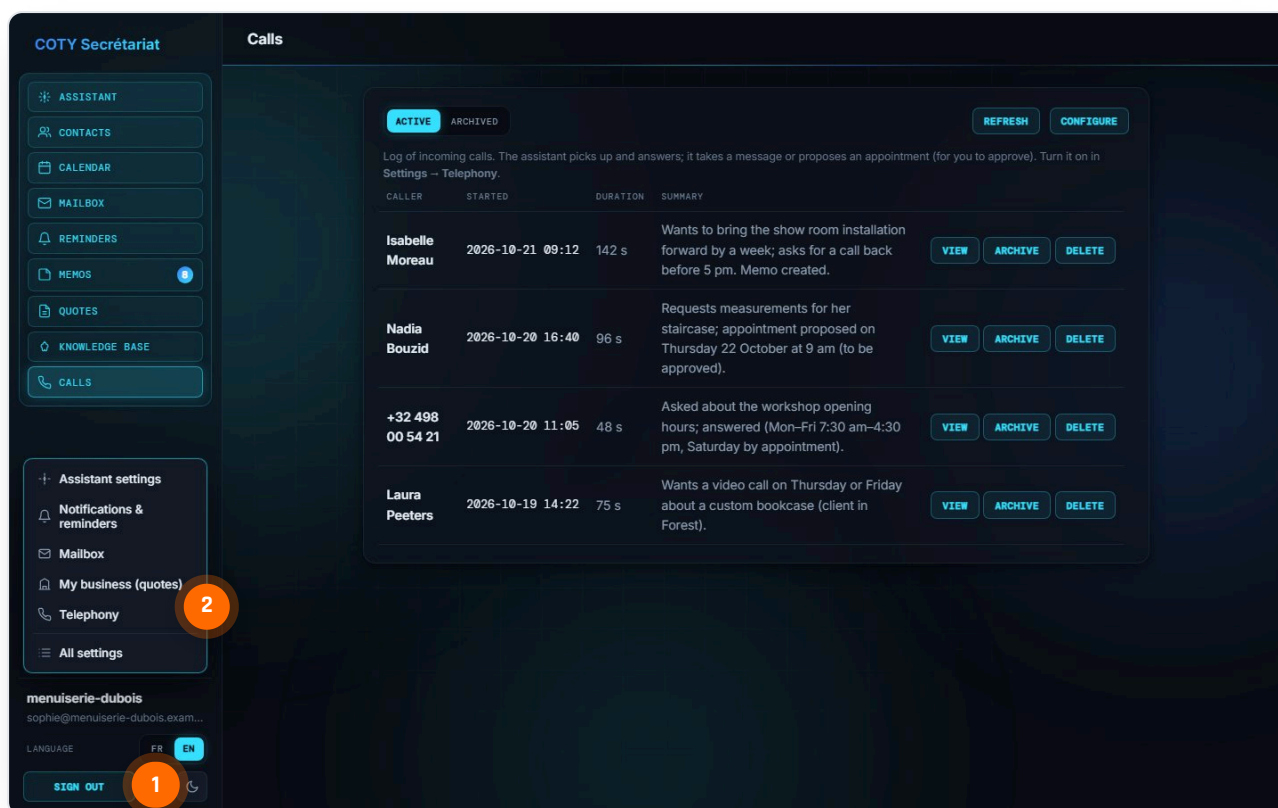
#### WHAT THE ASSISTANT DOES ON THE PHONE – AND WHAT SHE DOES NOT

On the phone, she stays careful: she informs (opening hours, services), takes a message and suggests an appointment **for you to approve**. She never sends an email or a quote during a call.

## CHAPTER 13

# Settings

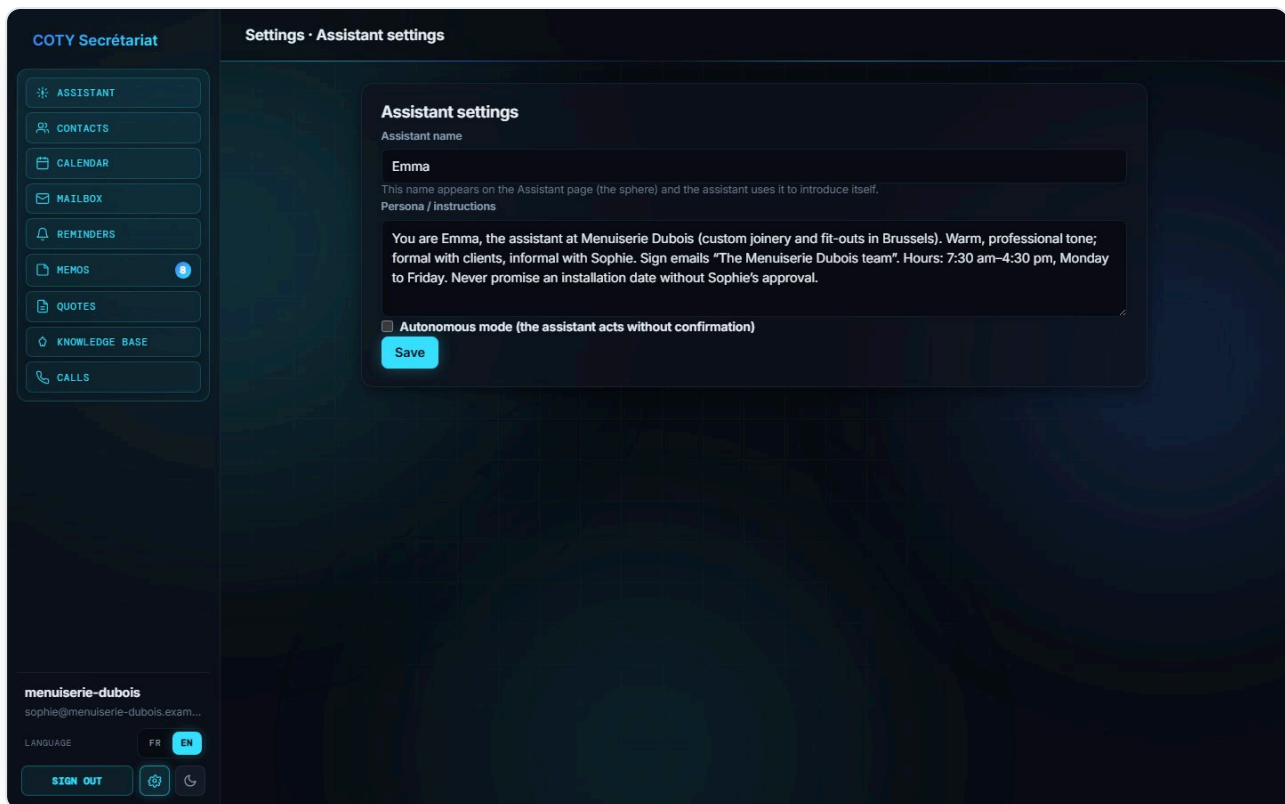
Settings open from the gear wheel at the bottom of the menu: choose a section, or **All settings**. Each section is saved separately with its own **Save** button.



The settings menu: the gear wheel (1) opens the list of sections (2).

## Assistant settings

- **Assistant's name:** shown on the Assistant page; she uses it to introduce herself.
- **Persona / instructions:** tone, signature, opening hours, house rules ("always be formal", "sign as The Dubois team"...).
- **Autonomous mode:** when ticked, the assistant acts without asking for confirmation.



Assistant settings.

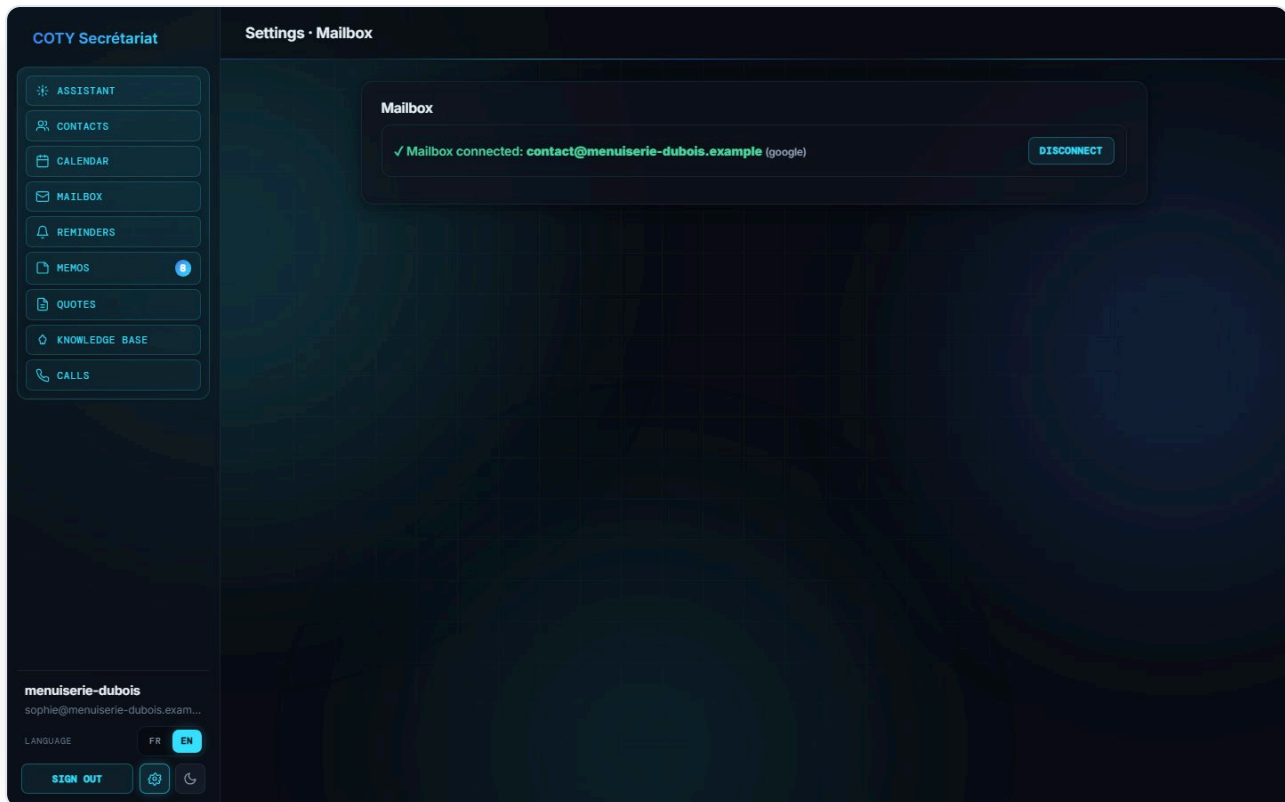
## Notifications & reminders

Enter the **boss's email** and **phone**: they are the default recipients of reminders and follow-ups. Text messages and WhatsApp use a sending account set up when the service is installed.

## Mailbox

**Recommended:** click **Connect Gmail** or **Connect Outlook** and accept the requested permissions. No password is stored.

**Other host (OVH...):** choose the matching preset; the servers fill in by themselves. Enter your address and mail password, then click **Test connection** — no email is sent during the test.



Connecting the mailbox: in one click (Gmail, Outlook) or manually (IMAP/SMTP).

#### EMAIL

With manual setup, Gmail requires an “app password” (2-Step Verification turned on). The one-click connection avoids this step.

## My business (quotes)

Company name, legal form, address, email, phone, website, company number (BCE), VAT number, IBAN, default VAT rate and legal mentions. The **VAT scheme** drives the VAT on quotes: **VAT-registered** (VAT applied) or **exemption** (small business, VAT not applicable, legal mention added).

COTY Secrétariat

ASSISTANT

CONTACTS

CALENDAR

MAILBOX

REMINDERS

MEMOS

QUOTES

KNOWLEDGE BASE

CALLS

menuiserie-dubois

sophie@menuiserie-dubois.exam...

LANGUAGE

FR

EN

SIGN OUT

Settings · My business

My business (quote header)

This information appears on your quotes. The VAT scheme drives VAT (registered = VAT charged; exemption = small business, VAT not applicable).

Company name

Menuiserie Dubois

Legal form

VAT no.

SRL

BE0123.456.789

Company no. (BCE)

IBAN

0123.456.789

BE71 0961 2345 6769

Address

Rue des Ébénistes 12

Postcode

City

1070

Anderlecht

Email

Phone

contact@menuiserie-dubois

+32 2 000 12 34

Website

www.menuiserie-dubois.example

VAT scheme

Default VAT rate (%)

VAT-registered (VAT charged)

21

Legal notices

(one per line, page footer)

Quote valid for 30 days from its date of issue.

30% deposit on order, balance on completion of the work.

6% VAT subject to the client's certificate (home over 10 years old)

Save

**My business:** this information forms the header of your quotes.

## Telephony

| RECEPTION MODE                 | BEHAVIOUR                                                                                       |
|--------------------------------|-------------------------------------------------------------------------------------------------|
| The assistant answers          | The assistant picks up every call directly.                                                     |
| Ring first, then the assistant | Your phone rings for the chosen number of seconds; if nobody answers, the assistant takes over. |
| Forward immediately            | The call is forwarded to your number, without the assistant.                                    |

- **Greeting message:** the sentence spoken at the start of the call.
- **Record calls:** only turn this on if you inform your callers (GDPR requirement).
- The number, the voice and the technical credentials are set up by COTY Agency when the service is installed.

© 2026 COTY Agency — screenshots contain fictitious data

29 / 34

COTY Secrétariat

ASSISTANT

CONTACTS

CALENDAR

MAILBOX

REMINDERS

MEMOS

QUOTES

KNOWLEDGE BASE

CALLS

menuiserie-dubois

sophie@menuiserie-dubois.exam...

LANGUAGE

FR

EN

SIGN OUT

Settings · Telephony

Telephony (voice reception)

The assistant answers calls to your Twilio number by voice. On the phone it only does safe things: give information, take a message, propose an appointment (for you to approve) — never emails or quotes. Secrets encrypted, never shown again.

☒ Enable phone reception

Answering mode

Ring first, then the assistant

Forwarding number

+32 470 00 18 18

Ring time (s)

20

Greeting

Hello, you've reached Menuiserie Dubois. I'm Emma, the workshop assistant. How can I help you?

☐ Record calls (callers must be informed under GDPR)

Twilio number

+32 460 00 42 42

Voice (ElevenLabs ID)

empty = default voice

Twilio — Account SID

AC5d0e7c1f9a2b4d6e8f0a1c3e5b7d9f2a4c

Twilio — Auth Token

\*\*\*\* (already set)

Save

In the Twilio console, on your number → A call comes in → Webhook (HTTP POST):

[https://voix.coty.agency/api/telephony/voice/vt\\_8f3c21d9a7e44b6c](https://voix.coty.agency/api/telephony/voice/vt_8f3c21d9a7e44b6c)

COPY

**Telephony:** activation, reception mode and greeting message.

© 2026 COTY Agency — screenshots contain fictitious data

30 / 34

## CHAPTER 14

# Security and privacy

---

- **Mandatory two-factor authentication:** a password alone is never enough to get in.
- **Isolated data:** each business has its own sealed workspace; another client can neither see nor guess your data.
- **Encryption:** contacts, emails, quotes and technical credentials are encrypted. Passwords and keys are never displayed again.
- **Human approval:** in the default mode, nothing is sent or deleted without your click.
- **Knowledge base without sensitive data:** a safeguard refuses contact details and banking identifiers.
- **GDPR:** you remain responsible for your clients' data; COTY Agency acts as a processor. Recording calls requires informing callers.

**GOOD PRACTICE**

Use a unique password, sign out on a shared computer, and alert support immediately if you lose your phone or notice suspicious access.

## CHAPTER 15

# FAQ and troubleshooting

**My 6-digit code is rejected.**

Make sure your phone's time is set automatically: codes depend on the exact time. Wait for the next code and try again.

**I lost my phone.**

Contact support: once your identity is verified, we reset your two-factor authentication and you scan a new QR code.

**My emails no longer arrive in the app.**

Check whether a "Mailbox disconnected" banner is shown and click "Reconnect". With manual setup, run "Test connection" again in Settings → Mailbox.

**The assistant does not do what I ask.**

Rephrase with who, what and when ("an appointment with Mr Renard on Thursday at 10 am at the workshop"). Also check the "Actions to confirm" panel: the action may be waiting for your approval.

**A reminder failed.**

Open the "Failed" filter to read the reason (invalid address or number, for example), correct it if needed, then click "Retry".

**The quote PDF shows the wrong address.**

Complete Settings → My business, then generate the PDF again.

**Can I use COTY Secrétariat on my phone?**

Yes, the interface adapts to small screens. For writing quotes, a computer remains more comfortable.

**Some messages from the server are in French.**

A few technical error messages are not translated yet. Contact support if one of them is unclear.

**Who can see my data?**

Only you and the people you give access to. COTY Agency only accesses it for support, at your request.

## CHAPTER 16

# Support



A question, a problem, an idea for improvement? Write to us:

- Email: [contact@coty.agency](mailto:contact@coty.agency)
- Form: [coty.agency/en/contact.html](https://coty.agency/en/contact.html)
- Online demo: [coty.agency/demo-cotysecre](https://coty.agency/demo-cotysecre)

We reply within one business day. To speed things up, include your workspace name, what you were doing and, if possible, a screenshot — but never send us a password or a security code.



# COTY Agency



Tailor-made automation and AI for SMEs.

coty.agency · [contact@coty.agency](mailto:contact@coty.agency)

The screenshots in this guide come from the public demo and contain only fictitious data.