



AI Conversational Search

Empower your team to spend more time listening by providing critical real-time guidance. With Sidekick's AI Conversational Search, your agents have compliant snippets of information at their fingertips. Reduce AI hallucinations and maintain human-in-the-loop oversight.



Feature FAQs

You asked. We've got the answers.

What is Sidekick's AI Conversational Search all about?

AI Conversational Search is a powerful tool built on top of Panviva's core, and is available as our Sidekick browser extension for Google Chrome and Microsoft Edge. Our Sidekick with AI Conversational Search chatbot is powered by Agentic Retrieval Augmented Generation (aka RAG) and exclusively uses Panviva knowledge—the same content that powers our existing users—to provide conversational answers. With RAG + LLM, instead of getting generic or inaccurate responses, frontline workers get answers grounded in your actual documentation, policies, and data.

With Sidekick's AI Conversational Search, your team has compliant snippets of information at their fingertips. Panviva already provides a traditional user interface via our "the guide on the side" using a keyword-based search with formatted, human-reviewed and approved content. With Sidekick 2.0, now users can ask questions in plain English, just like asking a colleague or trusted friend.

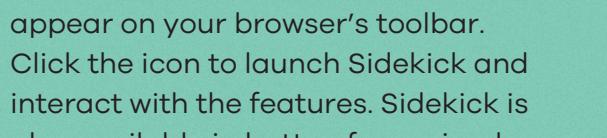
No keywords, no complex training, and no system changes required. Just ask questions in natural language and get instant answers grounded in your trusted knowledge.

What GenAI does Sidekick use?

Sidekick uses the AWS (Amazon Bedrock) cloud-hosted model Hikai 3.0.

When will this update be available?

Sidekick's AI Conversational Search update will be officially launching as "Sidekick 2.0" on Feb. 10, 2026.



Is there a way to provide feedback?

Yes, you can do it in-app! In the next phase of Sidekick, you will be able to see and analyze the feedback provided.

How can I download Sidekick?

Installing Sidekick is fast and easy. Simply visit your browser's extension store (Google Chrome, Microsoft Edge, etc.), search for "Sidekick," and click "Install" or "Add to Browser." Once installed, the Sidekick extension icon will appear on your browser's toolbar. Click the icon to launch Sidekick and interact with the features. Sidekick is also available in button form: simply click to expand and get started.

Key Access & Usage Information:

- Panviva's Knowledge Anywhere and Digital Orchestrator features are required to use Sidekick
- For new users, your organization must request access at: panviva-support@uplandssoftware.com
- Organizations must provide:
 - Organization name
 - Tenant ID: Found in the URL used to access Panviva
 - Example of a Tenant ID: [tenant ID].supportpoint.com

What makes AI Conversational Search so different?

Unlike AI tools that search across uncontrolled sources, ours only accesses our customer's existing, human-reviewed and approved Panviva knowledge base. With our hybrid approach of RAG + LLM, frontline workers get answers grounded in your actual knowledge documentation. Team members have compliant snippets of information at their fingertips. This ensures the same level of accuracy and compliance that you already trust, while providing both document discovery and information extraction in a single conversational interface.

How can my organization use it?

When you visit compatible websites, Sidekick displays the response against the searched keyword in a clean, compact format. You can click on Sidekick to view more details or ask a question.

Utilize AI Conversational Search by asking questions, no keywords needed. It's really that easy! Sidekick responds with intelligent, AI-powered answers taken directly from your Panviva knowledge base.

Users can let Sidekick know if the information provided was helpful (or not), open Panviva to view the source document, or copy responses from Sidekick into "Notes" or "Case" by simply clicking **copy** within Sidekick. Then users can find copied information on their clipboard and paste it anywhere they'd like.

What is the difference between the first iteration of Sidekick from 2025, and this version of Sidekick that includes AI Conversational Search?

"Sidekick 1.0" utilized keywords to find the right documents on the fly. It relied on Azure AI Search to sort through knowledge housed in Panviva and served it up via Smart Snippets in a simple, easy-to-use interface. AI Conversational Search, aka "Sidekick 2.0" removed the need of having Smart Snippets ready to go, which can be a timely process for teams, by tapping into agentic RAG, which allows for a natural language flow. AI Conversational Search uses a hybrid model, giving you the speed of AI with the safety of human oversight. Our hybrid approach combines AI efficiency with mandatory human-approved response cards, ensuring regulatory requirements and essential elements are always included.

How much does Sidekick cost?

Sidekick is included in Panviva's Premium Anywhere tier. Current customers can reach out to your Customer Success Manager to learn more.

Does the latest Sidekick release have Roles & Permissions?

Yes! Team members only receive answers from knowledge they're already authorized to access, maintaining your security and compliance standards. Frontline workers will never see information that they shouldn't.



Ready to see Sidekick in action?

Request a demo