



● AI REVENUE DESK FOR MED SPAS

Kovy Desk User Manual

Premium Sales & Onboarding Manual — your complete guide to capturing every lead, following up automatically, and booking more clients with safety built in.

“Capture. Follow Up. Book More Clients.”

48

AI Agents

5

Language Support

1-Click

Setup

Secure

Enterprise-grade

Start Here

Three steps to activate your AI Revenue Desk.

1

Choose Your Plan

Starter (\$149/mo), Growth (\$299/mo), or Pro (\$499/mo). Start small, upgrade anytime.

2

Activate Kovya Copilot

One click. Copilot detects your plan and activates 3–13 AI modules automatically.

3

Review Your Dashboard

See your activation summary, readiness checklist, and import your first prospects.



Nothing is sent, booked, or charged until you explicitly go live. You stay in full control at every step.

WHAT KOVYA STARTS DOING FOR YOU



Missed Lead Follow-Up

Capture and recover calls your team missed.



WhatsApp AI Readiness

AI message drafting and conversation support.



Email Campaign Planning

Plan follow-up sequences and nurture campaigns.



Lead Lists & Segments

Organize, filter, and prioritize prospects.



Prospect Scoring

Every lead validated, scored, and tracked.



Safety Controls

12 safety gates, DNC protection, preview mode.

WHY MED SPAS CHOOSE KOVYA DESK

- ✓ Purpose-built for aesthetic clinics — not a generic CRM
- ✓ AI-powered lead recovery catches opportunities you're missing
- ✓ No technical skills required — anyone on your team can use it
- ✓ One-click Copilot setup eliminates manual configuration
- ✓ Preview mode protects your clinic's reputation
- ✓ Scales from a solo practice to a multi-location operation

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Kovya Desk does not provide medical, legal, or financial advice. This manual covers product usage only. Kovya Desk does not guarantee specific revenue results, bookings, or client numbers. All automation features operate within safety-controlled preview mode until explicitly activated by the customer.

Kovya Copilot

One-Click Activation

Stop configuring. Start growing. Copilot configures your workspace in under 3 seconds.

1

Plan Detection

Reads your subscription level.

2

Module Activation

Activates 3-13 AI modules.

3

Preview Ready

Everything ready in safe preview.

3

Starter — \$149/mo

8

Growth — \$299/mo

13

Pro — \$499/mo

— PRE-ACTIVATION CHECKS

- ✓ Subscription verified

✓ Acquisition subsystem ready

✓ Safety gates enforced
- ✓ Module access confirmed

✓ Compliance configured

✓ Data isolation (RLS) verified

✓ What Happens Right After Activation

1

Plan detected automatically

2

All modules activated (3, 8, or 13)

3

Workspace enters safe preview mode

4

Summary & readiness checklist

5

Ready to import prospects

💡 CHOOSE THE RIGHT PLAN FOR YOUR CLINIC

Plans that grow with you



Starter
\$149/mo
Solo clinics getting started

AI Modules	3
Prospects / mo	100
Lists	3
Imports / mo	5
Segments	—
Campaigns	—



Growth
\$299/mo
Growing multi-channel clinics

AI Modules	8
Prospects / mo	500
Lists	10
Imports / mo	20
Segments	10
Campaigns	5

★ **MOST POPULAR · BEST VALUE**



Pro
\$499/mo
Full-scale revenue operations

AI Modules	13
Prospects / mo	5,000
Lists	50
Imports / mo	100
Segments	50
Campaigns	25

📈 WHY UPGRADE TO GROWTH OR PRO?



Starter → Growth
For multi-channel outreach, 500 prospects/mo, WhatsApp AI, and dormant client reactivation.



Growth → Pro
For full orchestration, 5,000 prospects/mo, calendar automation, plus SEO & paid growth intelligence.



Start small, scale on your terms. All your data, lists, and configurations are preserved when you upgrade — anytime.

Your reputation, protected at every level



No unauthorized outreach

Nothing sent without your approval.



DNC protection

Do-Not-Contact lists always respected.



Opt-in required

Contacts must opt-in before automation.



Unsubscribe required

Every email includes an unsubscribe link.



No medical claims

AI never makes diagnoses or promises.



Human handoff

Complex cases escalated to your team.

12

safety gates are always enforced

Protecting your clinic from day one — automatically, with no configuration required.



Get there fast: app.kovyadesk.com → Dashboard → Copilot.
WhatsApp: +1 307 202 4142 | support@kovyadesk.com



Welcome to Kovya Desk

Welcome to Kovya Desk — your AI Revenue Desk designed specifically for med spas, aesthetic clinics, and wellness centers.

Kovya Desk was built to help clinics like yours recover the revenue that slips through the cracks every day. Whether it's a missed call that never gets returned, a DM that goes unanswered, a consultation that never gets booked, or a loyal client who simply hasn't been back — Kovya Desk helps you capture those opportunities before they're lost.

This manual will walk you through everything you need to know to get started, understand your features, and make the most of your subscription.



What Kovya Desk Does

Kovya Desk is a centralized AI-powered platform that manages your clinic's lead acquisition, follow-up, and client recovery workflows.

— CORE CAPABILITIES

- **Missed call recovery** — never lose a lead because no one answered
- **AI message drafting** — professional responses generated automatically
- **Lead capture & scoring** — every prospect validated and prioritized
- **Pipeline management** — organize, filter, and track every lead
- **Multi-channel readiness** — WhatsApp, Email, Calendar
- **Plan-based automation** — adapts to your subscription level



What makes Kovya different: Unlike generic CRMs, Kovya Desk was purpose-built for the med spa industry. It understands aesthetic clinic workflows, booking patterns, and the specific leads clinics handle. Every feature is designed with compliance and safety in mind — no medical claims, no aggressive automation, no surprises.



Who Kovya Desk Is For

— PRIMARY AUDIENCE

- Med spas and aesthetic clinics
- Botox and dermal filler clinics
- Laser treatment centers
- Skin care and rejuvenation clinics
- Weight loss and body contouring clinics
- Wellness and integrative health centers
- Any clinic that relies on appointment bookings and client follow-up

— WHO USES IT DAILY

Clinic owners, practice managers, front desk coordinators, and marketing managers. No technical background or coding skills are required — Kovya Desk is designed so that anyone on your team can use it confidently.



Quick Start After Purchase

After purchasing your subscription, getting started takes just a few minutes.

— STEP-BY-STEP

- 1 You'll receive a welcome email with your login credentials
- 2 Visit app.kovyadesk.com and sign in
- 3 Explore your Dashboard to see all available features
- 4 Navigate to **Dashboard** → **Copilot** and click "Activate Autopilot"
- 5 Kovya Copilot automatically configures your workspace based on your plan
- 6 Review the activation summary and readiness checklist
- 7 Start importing your prospect lists or explore the AI features



No technical setup is required. **Kovya Copilot does the heavy lifting for you.**



How to Access Your Dashboard

Your Dashboard is the central hub of Kovya Desk. After logging in, you'll see:

— DASHBOARD ELEMENTS

- **System health status** — confirm everything is running correctly
- **Quick navigation cards** — jump to any feature area
- **Agent count** — 48 specialized AI agents registered and ready
- **Subsystem status** — Stripe billing, data security, channel readiness
- **Admin Panel** access for management features
- **Clinic Dashboard** for day-to-day operations

— NAVIGATION

Use the sidebar or top navigation to access: Acquisition, Channels, Support, Settings, and Admin areas. Each section has clear labels and descriptions.



Understanding Your Plan

Kovya Desk offers three subscription plans, each designed for different clinic sizes and automation needs. Your plan determines how many features you can access, how many prospects you can manage, and how many automation modules are activated.



How plans work

When you subscribe, your account is immediately configured with the features and limits matching your plan. Upgrade anytime to unlock more modules and higher limits. All existing data, lists, and configurations are preserved when you upgrade.



Plan philosophy

Start with Starter to see how Kovya works for your clinic. Upgrade to Growth when ready for multi-channel follow-up. Choose Pro for the complete AI Revenue Desk with maximum automation and analytics.



What Each Plan Includes



Starter

\$149/month

3 automation modules:

MISSED CALL RECOVERY

LEAD CAPTURE & SCORING

FOLLOW-UP SEQUENCES

Limits: 100 prospects/month · 3 lists · 5 CSV imports. *Best for:* small clinics starting with lead recovery and basic follow-up planning.



Growth

\$299/month

8 automation modules — everything in Starter, plus:

AI INBOX

WHATSAPP FOLLOW-UP

DORMANT CLIENT REACTIVATION

NO-SHOW PREVENTION

EMAIL CAMPAIGN PLANNING

Limits: 500 prospects/month · 10 lists · 20 CSV imports · 10 segments · 5 campaigns. *Best for:* growing clinics that want comprehensive acquisition and multi-channel follow-up.



Pro

\$499/month

13 automation modules — everything in Growth, plus:

FULL AGENT ORCHESTRATION

PAID GROWTH INTELLIGENCE

SEO AGENT REPORTS

ADVANCED ANALYTICS

CALENDAR BOOKING ASSISTANT

Limits: 5,000 prospects/month · 50 lists · 100 CSV imports · 50 segments · 25 campaigns. *Best for:* established clinics that want the complete AI Revenue Desk with maximum automation.



Kovya Copilot / Autopilot Activation

Kovya Copilot is your guided automation assistant — activate your entire workspace with a single click. No manual configuration, no technical setup, no guesswork.

Think of Kovya Copilot as your personal setup assistant that knows exactly which features your plan includes and prepares everything for you automatically.



Where to find it

Navigate to **Dashboard → Copilot** (route: /dashboard/autopilot). You'll see a prominent activation button with a clear description of what happens when you click it.



Why it exists

Most SaaS products require manual configuration of dozens of settings before you can start. Kovya Copilot eliminates that friction entirely. One click, and your workspace is ready.



How One-Click Activation Works

When you click "Activate Autopilot," Kovya Copilot performs three automated steps:



Plan Detection

Detects your active subscription and plan level — determining which modules activate.



Module Configuration

Activates all modules in your plan (3 / 8 / 13), each with safe defaults in preview mode.



Preview Preparation

Workspace prepared in safe preview — no real messages, emails, or calendar events.



Duration: the entire activation process takes approximately 2–3 seconds, with an animated progress bar throughout.



What Happens After Copilot Is Activated

After activation, you'll see a comprehensive activation summary.

— ACTIVATION RESULTS

- All activated modules with current status
- A readiness checklist of what's ready & what needs attention
- Current usage compared to plan limits
- All 12 safety gates with enforcement status
- Clear next steps for connecting channels

— WHAT TO DO NEXT

- 1 Review activated modules to see what's available
- 2 Check the readiness checklist for items needing attention
- 3 Import your first prospect list to build your pipeline
- 4 Explore each module in preview mode
- 5 When ready, connect channels to transition to live mode



Safety Checks Before Activation

Kovya Copilot runs **13 readiness checks** before activating your workspace, then enforces **12 safety gates** at all times.

— 13 READINESS CHECKS

- Plan subscription verification
- Module access by plan level
- Acquisition subsystem readiness
- Channel integration status
- Compliance configuration review
- DNC list status
- Consent tracking · Runtime status
- Outbound messaging · Safety gates
- Data isolation (RLS) · Agent registry · Billing health

— 12 SAFETY GATES

- 1 Opt-in required before automated messages
- 2 DNC lists always respected
- 3 Unsubscribe links required in all emails
- 4 Quiet hours enforced (8PM–9AM)
- 5 No medical claims or diagnoses
- 6 No guaranteed revenue or ROI promises
- 7 No fake testimonials or reviews
- 8 No unauthorized data scraping
- 9 No hard deletes — soft-delete only
- 10 Outbound gate · Runtime gate
- 11 No live API calls in preview mode



Why Some Features Appear as Preview-Only

When you first activate Kovya Desk, most features operate in preview-only mode. This is intentional and designed to protect your clinic.



What preview means

The system generates outputs for your review but does not execute real actions:

- AI drafts messages, but does not send them
- Bookings are previewed, not created
- Campaigns are planned, not delivered
- Sequences are simulated, not triggered



Transition from preview to live

- 1 Connect WhatsApp (Meta Cloud API or Twilio)
- 2 Connect email (Resend/SendGrid) & verify domain
- 3 Connect calendar (Google Calendar)
- 4 Upload and verify your DNC list
- 5 Complete the compliance review checklist
- 6 Enable the runtime toggle
- 7 Enable the outbound toggle



Why this protects you: no messages are accidentally sent, no appointments accidentally created, and no emails go out before you've reviewed and approved every workflow.



Lead Capture & Missed Call Recovery



Missed call recovery

When a potential client calls and no one answers, that lead is at risk of going to a competitor. Kovya tracks these missed opportunities and creates follow-up workflows to re-engage the caller — via AI-drafted responses, SMS, or email (once channels are connected and outbound is enabled).



Lead scoring

Every lead is automatically scored on data completeness (name, email, phone, website, location, niche). Higher scores indicate stronger, more actionable leads — helping you prioritize the leads most likely to convert.



Prospect & Lead Management

Prospects are the core data records in Kovya Desk. Each prospect represents a potential client or business lead.

— PROSPECT FIELDS

- Clinic / business name
- Website URL
- Instagram handle
- Email address
- Phone number
- City and state
- Owner / manager name
- Category / niche
- Notes & contact status
- Data quality score
- Priority level
- Compliance flags (DNC, consent)

— FILTERING AND SEARCH

Filter prospects by any field: status, priority, niche, state, city, quality score, source, or DNC status. Use filters to quickly find specific records or groups.



Importing Prospects & Client Lists



Upload process

- 1 Prepare a CSV (name, website, IG, email, phone, city, state, owner, niche, notes)
- 2 Admin → Acquisition → Import
- 3 Upload your CSV file
- 4 System validates every record



Validation

- Checks for required fields
- Detects duplicate records
- Scores data quality per record
- Assigns priority levels
- Flags compliance concerns



Preview & commit

Preview every record before committing. Data enters your database only after you confirm. Limits enforced —
Starter 5/mo · Growth 20 · Pro 100.



Lists and Segments

Organize your prospects into named lists and dynamic segments for targeted outreach.



Lists

Named groups of prospects. Create lists to organize by source, campaign, or any criteria you choose. Add or remove members at any time.

Plan limits: Starter 3 · Growth 10 · Pro 50.



Segments

Dynamic filters that automatically group prospects by status, priority, niche, state, or quality score. Unlike lists, segments update in real-time as your data changes.

Available on Growth and Pro plans.



Campaign Assignments

The Campaign Assignment Manager links segments to outreach campaigns for organized acquisition planning.



How it works

- 1 Select a segment or list
- 2 Choose a campaign type
- 3 Create the assignment
- 4 DNC contacts automatically excluded

Available on Growth (5) and Pro (25 campaigns).



Current mode

Campaign assignments currently operate in **planning mode**. Assignments are created and organized, but no outbound messages are sent until runtime and outbound are explicitly enabled by you.



WhatsApp AI Autoresponder

Manage inbound WhatsApp conversations with AI-powered intelligence.

- **Conversation Command Center** — view all inbound WhatsApp conversations in one place, each classified by intent (booking, price inquiry, complaint, follow-up) and given a priority.
- **AI draft replies** — the AI generates a professional draft for each message. Drafts are for your review — NOT sent automatically.
- **Human handoff** — complex, sensitive, or high-priority conversations are flagged for human review. Never sends medical advice or clinical claims.
- **Current status** — preview-only; no real WhatsApp messages are sent. To go live, connect your provider (Meta Cloud API or Twilio) and enable outbound.



Email Follow-Up Readiness



What's available

- Email template preview
- Campaign planning with segments
- Provider readiness (Resend or SendGrid)
- Domain verification status (SPF/DKIM)
- Preview mode — planned, not delivered, until you connect a provider



Getting ready for live email

- 1 Choose your provider (Resend or SendGrid)
- 2 Add provider API credentials in Channel settings
- 3 Verify your sending domain (SPF & DKIM)
- 4 Enable outbound messaging
- 5 Test with a preview send before going live



Calendar & Booking Readiness



What's available

- Availability preview — see how bookings would look
- Booking workflow preview — simulated appointment creation
- Provider readiness checks (Google Calendar)
- Preview mode — no real calendar events created until you connect a provider



Getting ready for live bookings

- 1 Connect your Google Calendar account
- 2 Set availability windows
- 3 Configure booking confirmation messages
- 4 Enable the booking workflow
- 5 Test with a preview booking before going live



Customer Support AI Agent

The Customer Support AI Agent provides instant help within the app. Navigate to **/support** and type your question — the AI searches a 20-article knowledge base and provides clear, contextual answers.

— WHAT IT CAN HELP WITH

- Understanding features and how they work
- Navigating the dashboard and settings
- Troubleshooting common issues
- Plan limits and upgrade options
- Preview mode and safety controls
- Guiding you through import & setup

— SAFETY PROTECTIONS

The Support AI includes prompt injection protection, secret-probing detection, and content safety scanning. It never provides medical, legal, or financial advice.



Admin Support & Human Handoff

When AI support isn't enough, Kovya Desk provides human handoff.



How escalation works

- The AI detects when a question is beyond its knowledge base
- A handoff is created with full conversation context
- You receive confirmation the issue has been escalated
- Our team reviews and responds via email or WhatsApp



Direct contact

Email: support@kovyadesk.com

WhatsApp: +1 307 202 4142

In-app: /support → escalate to human



App Updates & Notifications



Updates Center

Navigate to **Admin → Updates** to see the latest app updates, new features, and milestone announcements. Each update includes a version number, date, and description of changes.



How to stay current

Check the Updates Center after each login. Major updates may include new modules, integrations, or automation capabilities that become available on your plan **without additional cost**.



Plan Limits & Usage Tracking



Usage dashboard

Settings → Plan & Usage:

- Current plan name & price
- Prospects / lists / imports used vs. limit
- Segments & campaigns used vs. limit
- Visual progress bars per resource



At limits

- System shows "plan_limit_reached"
- Additional actions for that resource are blocked
- Existing data is never affected or deleted
- Upgrade anytime to increase limits



Feature availability

If a feature requires a higher plan, the system shows "feature_not_available_on_plan" with a clear explanation and upgrade path.



Privacy, Safety, Consent, Opt-Out & DNC

— ALWAYS ENFORCED

- Opt-in required before automated messages
- DNC lists always respected
- Quiet hours: no messages 8PM–9AM
- Unsubscribe links in all emails
- Content safety scanning · no medical claims
- No guaranteed revenue / fake reviews / scraping
- No hard deletes — soft-delete only

— DATA ISOLATION

Row-Level Security (RLS) policies ensure complete data isolation between tenants. No customer can access another's data — your lists, conversations, and configs are fully private.

— CONSENT TRACKING

Every contact has a consent status. Kovya tracks whether consent was obtained, when, and how. DNC flags cannot be overridden by AI agents or automation rules.



Troubleshooting

Can't import more prospects

You may have reached your plan's monthly import limit. Check Settings → Plan & Usage. Consider upgrading for more capacity.

Everything shows "preview-only"

Normal before connecting providers. Preview mode lets you validate workflows safely. Connect providers and enable outbound to go live.

Segments show 0 matches

Segments require imported prospects. Import your first CSV, then create segments. Try broader filter criteria if still empty.

Need to connect WhatsApp

You need a Meta Cloud API or Twilio account. Configure credentials in Admin → Channels → WhatsApp. Contact support for setup assistance.

Can't find a feature

Some features are only available on Growth or Pro plans. Check Settings → Plan & Usage to see what's included in your plan.

? Frequently Asked Questions



The most common questions from Kovya Desk customers are answered in the dedicated FAQ section that follows — covering activation, automation, privacy, plan limits, and going live.



Best Practices for Better Results



Data quality

- Import clean, complete prospect data
- Include email and phone whenever possible
- Categorize by niche for segmentation
- Remove duplicates before importing
- Regularly update contact statuses



Follow-up speed

- Respond within 5 minutes when possible
- Use AI drafts as starting points, then personalize
- Set up sequences for different stages
- Don't wait — faster follow-up, higher conversion



Compliance

- Always maintain your DNC list
- Honor opt-out requests immediately
- Use Kovya's consent tracking features
- Review AI content before sending
- Never make medical claims in outreach



Upgrade Path: Starter → Growth → Pro



Upgrade to Growth when...

- You need 100+ prospects/month
- You want WhatsApp follow-up
- You need dormant client reactivation
- You want email campaign planning
- You need dynamic segments



Upgrade to Pro when...

- You need 500+ prospects/month
- You want full agent orchestration
- You need advanced analytics
- You want calendar booking automation
- You need SEO & paid growth intelligence



How upgrading works

- 1 Settings → Plan & Usage
- 2 Select your new plan
- 3 Confirm via Stripe checkout
- 4 Workspace instantly reconfigured
- 5 All data preserved
- 6 Run Copilot again to activate new modules



Final Onboarding Checklist



Essential steps

- ☐ Log in to app.kovyadesk.com
- ☐ Explore the Dashboard
- ☐ Verify your plan in Settings → Plan & Usage
- ☐ Activate Kovya Copilot (Dashboard → Copilot)
- ☐ Review the activation summary
- ☐ Import your first prospect list via CSV
- ☐ Create at least one list
- ☐ Explore the WhatsApp AI Command Center
- ☐ Check Channel Integration readiness
- ☐ Visit Support and test the AI agent
- ☐ Review Safety & Compliance
- ☐ Bookmark the manual for reference



When ready for live operations

- ☐ Connect WhatsApp provider
- ☐ Connect email provider & verify domain
- ☐ Connect calendar provider
- ☐ Upload DNC list
- ☐ Complete compliance checklist
- ☐ Enable runtime
- ☐ Enable outbound
- ☐ Test with a preview send before going live
- ☐ Monitor first 24 hours closely

You're ready to recover revenue.

Quick answers, before you start

? Is setup difficult?

No. Kovya Copilot configures everything with one click.

? Is the system safe?

12 safety gates always enforced.
Nothing happens without your approval.

? Can I upgrade later?

Yes, anytime. All data and configurations are preserved.

? Do I need to hire someone?

No. Designed for busy clinic owners — AI handles the heavy lifting.

? FREQUENTLY ASKED QUESTIONS

Q: What happens when I click Activate Autopilot?

Kovya Copilot detects your plan, activates all allowed modules, and prepares your workspace in preview mode. No real messages are sent. You can review everything before going live.

Q: Can Kovya send WhatsApp replies automatically?

When configured with a connected WhatsApp provider and enabled runtime/outbound, yes. In preview mode, AI drafts are created but not sent automatically.

Q: Does Kovya send emails automatically?

Only after connecting an email provider, verifying your sending domain, and enabling outbound. Until then, email campaigns operate in planning/preview mode.

Q: Does Kovya book appointments automatically?

Only after connecting a calendar provider and enabling the booking workflow. Until then, booking availability is previewed but no real events are created.

Everything else, answered

Q: What happens if I reach my plan limit?

The system blocks additional actions for that resource and shows "plan_limit_reached." Existing data is not affected. Upgrade your plan to increase limits.

Q: Can I upgrade my plan later?

Yes, upgrade from Starter to Growth or Pro at any time. Your existing data and configurations are preserved.

Q: Is my data private and separated from other customers?

Yes. Kovya Desk uses Row-Level Security (RLS) policies for complete data isolation. No customer can access another customer's data.

Q: Do I need technical skills to use Kovya Desk?

No. Kovya Desk is designed for non-technical users. Kovya Copilot handles setup automatically, and the interface is designed to be intuitive.

Q: What is preview-only mode?

Preview mode means the system generates AI outputs, draft messages, and workflow previews for review — but does not execute real actions. No messages sent, no emails delivered, no bookings created.

Q: How do I get help?

In-app: /support for AI-assisted help. Email: support@kovyadesk.com. WhatsApp: +1 307 202 4142.



READY WHEN YOU ARE

Ready to Start Recovering Revenue?

Activate Kovya Copilot, import your first leads, and see AI-powered follow-up in action.

→ Activate Kovya Copilot to auto-configure your workspace

→ Import your first prospect list

→ Explore the Acquisition Dashboard

→ Connect channels when you're ready to go live

→ Contact our team for personalized setup support

Compare plans & upgrade anytime at app.kovyadesk.com



KOVYA DESK

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