QUICKAPP AI

Your AI assistant for retail planning in Excel

Ask Claude or ChatGPT about your live QuickApp plans in plain language. Answers are calculated by QuickApp's own rules, changes are prepared for your approval, and your permissions apply to every request.

"Which brands are behind budget this season?" "Where did margin slip compared with last year?" "What if we raise this category's target by 5%?"

HOW IT WORKS

1 Ask

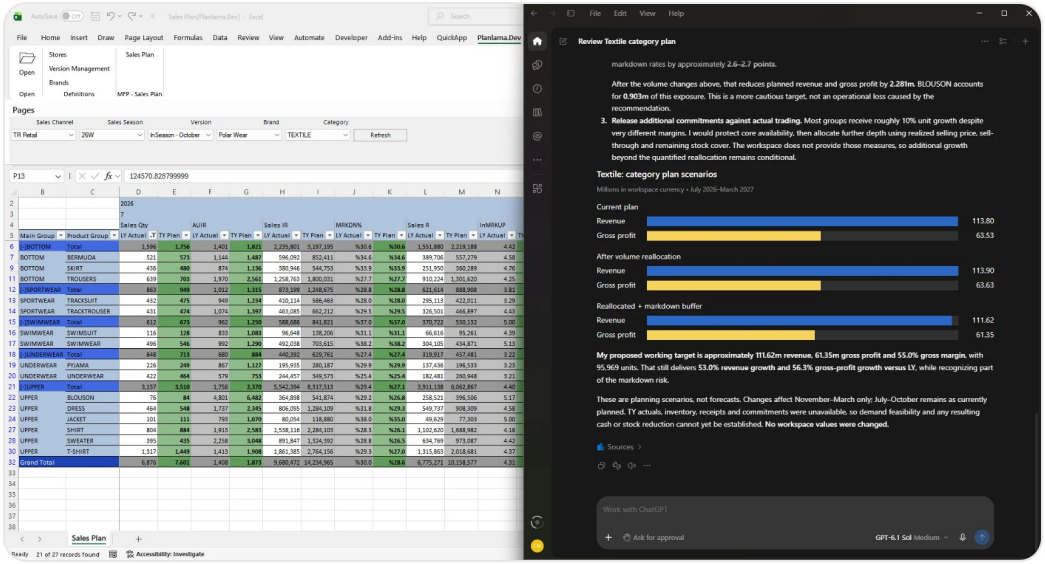
Ask in plain language. The assistant opens the workspace you need, chooses the application and sets the page selections.

2 Analyse

It works with the same view you see in Excel. Totals follow QuickApp's own rules. For data on no screen, it queries the reporting cubes your administrator opens to AI.

3 Prepare and approve

Ask it to build or revise a plan. It prepares the entries through QuickApp, checked against your rules. You review them in Excel and apply all, some or none.



ChatGPT Desktop next to a QuickApp workspace in Excel. Demo environment, sample data.

Watch a real session (1 min): three questions on a season plan, then a full-season revision of one product group, approved in Excel.

youtu.be/iqNGb3lfPmw

CONTROL

You decide what AI can see and do

Your permissions apply

Allowed, Read-only or Denied, for users and roles, checked again on every request. A revoked permission takes effect at once.

You approve the changes

By default, every change is shown in Excel before it is applied. You apply all, some or none. Locked cells and spreading rules still apply.

AI Datasets under your control

Administrators choose which cubes are open to AI, who can use each dataset, and which dimensions and metrics stay hidden.

No bulk copy to the AI provider

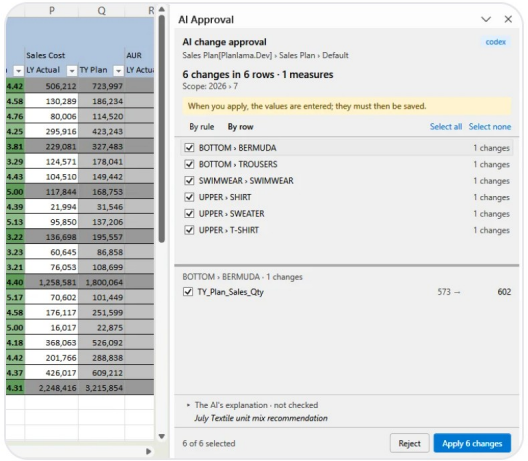
Your databases are never copied in bulk. For each question, the assistant receives only the results it needs, from data the user is allowed to access.

Changes are on record

Every AI action is recorded: who, which assistant, when, and how many changes were applied or rejected. Prompts, conversations and cell values are not stored.

Your choice of assistant

Results sent to the assistant are handled by the AI provider you choose, under your agreement with that provider.



The AI Approval pane in Excel: each row, its current and new value. You choose what is applied.

FOR IT TEAMS

Runs next to Excel

Installed with the QuickApp Excel add-in, on the user's Windows computer. Code-signed.

Supported assistants

Claude and ChatGPT desktop apps, Claude Code, Codex, VS Code and Cursor.

Turned on by your administrator

Permissions are granted per namespace and environment.

AI Datasets on Analysis Services

Defined on SQL Server Analysis Services cubes; users' own cube permissions apply.

See QuickApp AI with your own plans

Available from QuickApp 3.1. Contact us or your QuickApp consultant to turn it on.

Book a demo