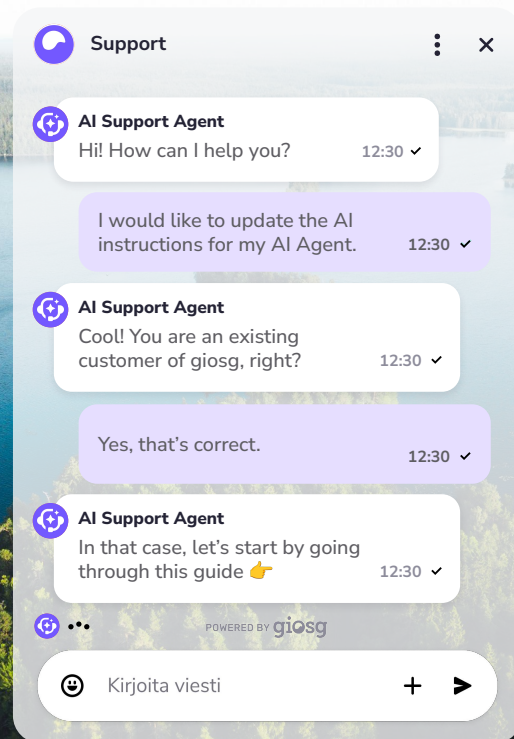




# giosg AI Agent guide

Helping you get started with setting up, monitoring, and customizing your AI Agents.



# Content

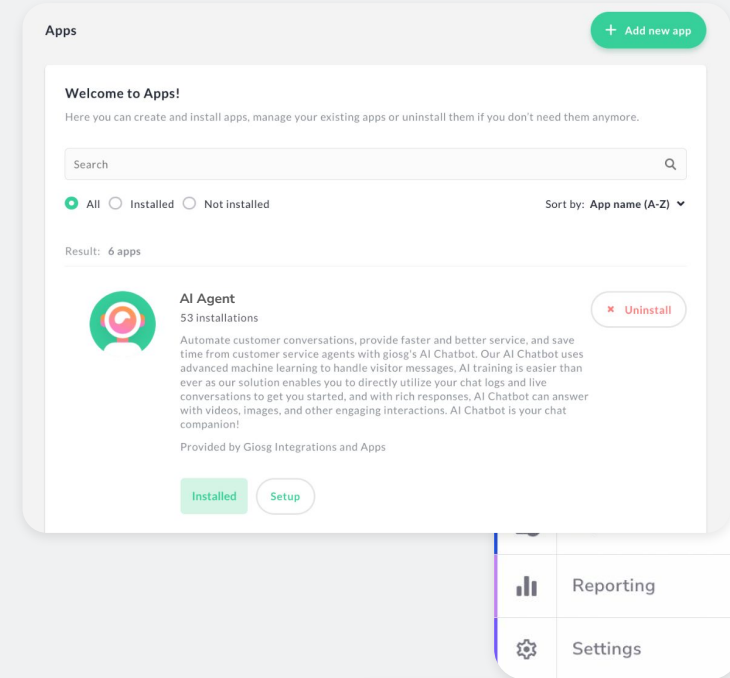
- 1 Getting started
- 2 AI Agent setup
- 3 Knowledge bases
- 4 Monitoring with Chat logs
- 5 Performance reporting
- 6 Visual look

# Getting started

## 1 Getting started

# Accessing the AI Agent app

- Head to Settings → Apps → AI Agents → **Setup** or go directly to <https://chatbot.giosg.app/bots>
- In the AI Agent app, you will find all the settings, instructions and knowledge that has been assigned to your AI Agent(s). You can also monitor its performance and improve it with time.




Can be accessed by users with **“AI Chatbot Admin”** permissions. Permissions can be granted from User management.


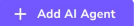
# AI Agent setup

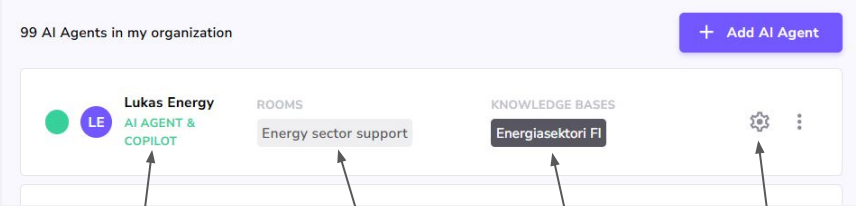
AI Agent overview  
AI Agent settings

## 2 AI Agents

# AI Agents overview

In the first page, you can see all of your AI Agents and their defined Service roles, connected Rooms, and sets of Knowledge bases they use. Once you click the  icon, you can access their settings, including their Fallback and general AI instructions.

- Next,
  - If you already have an AI Agent you want to modify, **click the settings icon** 
  - If you don't yet have any AI Agents in this listing, **click the**  **button on top right corner.**



99 AI Agents in my organization + Add AI Agent

**Lukas Energy**  
AI AGENT & COPILOT

**ROOMS**  
Energy sector support

**KNOWLEDGE BASES**  
Energisektori FI

**Service roles** that your AI Agent should provide: either suggest replies or converse directly with visitors - or both.

**Rooms** where this AI Agent is enabled, e.g. specific domain room.

**Knowledge bases** used by this AI Agent.

**Access settings** here to modify your AI Agents, including its **Fallback** and **general AI instructions**.

## 2 AI Agents

# AI Agent settings

Open the settings for an AI Agent by clicking on the  next to it.

- **Name** the AI Agent
  - ALIAS is it's external name, shown to your website visitors
    - This can be changed anytime later.
  - The profile picture for the AI Agent can be changed from [User management](#)
- **Select** Service type
  - Choose what kind of services your AI Agent should provide. Should it have direct conversations with your website visitors (AI Agent service) or should it work behind the scenes, suggesting replies for your human agents (Copilot)?

**AI Agent**

**Name and appearance**

FIRSTNAME  
Artificial

LASTNAME  
AI Intelligence

ALIAS  
AI Agent

**Services** **ONLINE**

Choose which services this AI Agent should provide: either suggest replies or converse directly with visitors - or both.

Converse with visitors (AI Agent)

Suggest replies to Human Agents (Copilot)

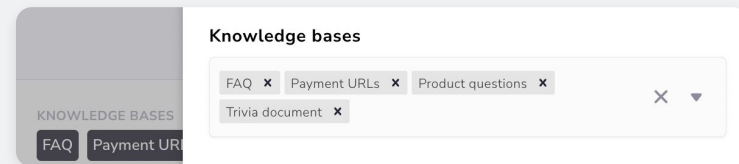
AI Agent settings are saved automatically.  
You can close the sidebar and continue the setup later if needed.

# AI Agent settings

## Knowledge bases

Here you **choose** which *Knowledge bases* the AI Agent should use when it is answering questions. **You can add these later** in the setup process (see slide [13](#)), especially with your first AI Agent.

- AI Agent only has access to information that can be found in the Knowledge bases that have been assigned to it.
  - = You can create multiple Knowledge bases but your AI Agent only uses the ones that are manually clicked and assigned to it.
- The same Knowledge bases can be used by many AI Agents or they can have their own individual ones.



You can assign Knowledge bases in this *AI Agents* tab, but it might be easier to do it from the *Knowledge bases* tab while creating them — especially if you haven't built any yet.

## 2 AI Agents

# AI Agent settings

## Fallback behavior

The fallback behavior defines how your AI Agent acts when it can't find an answer to the visitor's question using the information in its knowledge bases. Fallback prompt is an important part of preventing AI from saying hallucinated things.

- **Click *AI instructions*** box under the Fallback behavior. This is the fastest and most flexible option.
  - Later, for a more advanced Fallback we use AI Tools. Contact [support@giosg.com](mailto:support@giosg.com) when you consider utilizing our *Tools*.

Only answer questions related to [COMPANY X] and [COMPANY X'S TOPICS / SERVICES].

Always base your answer only on the information provided in your instructions, knowledge base, or connected sources.

If the visitor asks about [COMPANY X] but you do not have information about the specific topic, say that you do not have information about it.

Then ask if you can help with something else related to [COMPANY X].

If the visitor still needs help, tell them they can contact support at [EMAIL ADDRESS/PHONE NUMBER]

If the visitor asks about something unrelated to [COMPANY X], explain that you are here to help only with questions related to [COMPANY X] and [COMPANY X'S TOPICS / SERVICES].

Do not answer questions outside this scope.

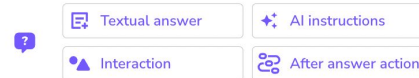
Do not answer questions about pricing, contracts, or employee information.

If the visitor asks about these flagged topics, explain that you cannot help with that topic in the chat and ask them to contact us at [EMAIL ADDRESS/PHONE NUMBER]



### Fallback behavior

AI will send this fallback answer if an answer cannot be found from any linked QnA knowledge bases.



If the question is clearly unrelated to Company X, say that you only answer questions about Company X. Otherwise, invite a human or instruct the visitor to contact customer service at [service@company.com](mailto:service@company.com)

### INSTRUCTIONS FOR THE AI

If the question is clearly unrelated to Company X, say that you only answer questions about Company X. If the visitor asks about stores and contact details, use the Store search tool to answer. If the visitor asks to talk to a human use the Transfer chat to human tool. If you still can't answer, offer to invite a human or if humans are unavailable suggest that the visitor contacts customer service by emailing [service@companyx.com](mailto:service@companyx.com)

### TOOLS

Transfer chat to Human

Store search

Fallback answer should be unique to your business, but you can utilize our **template** that works in most cases as a starting point.

## 2 AI Agents

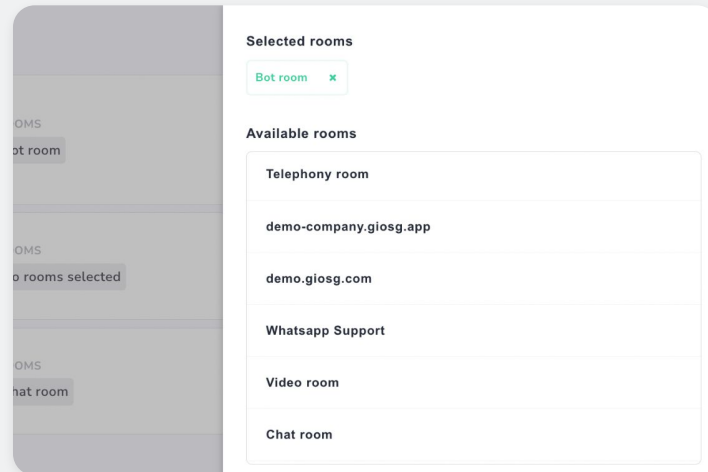
# AI Agent settings

## Room(s) the AI Agent will work in

- **Choose** which room(s) the AI Agent will work in and add them to Selected rooms.
- By default, **giosg experts have already created your room** that is visible in the “Available rooms” list → You just need to **select it for your AI Agent** by clicking it.
- When the Service type (see slide [Z](#)) has been selected and rooms have been defined, your AI Agent starts joining new conversations and working in them.



For any issues with this step, contact [support@giosg.com](mailto:support@giosg.com)



If you want your AI Agent to chat with your visitors also when human agents are available, add your AI Agent to the [Router](#) of your selected Room. Read more [here](#).

## 2 AI Agents

# AI Agent settings

## Instructions for the AI Agent

- **Write** the AI instructions that work as the description of your AI Agent and the role it plays in the conversations it is having. They create the context that it uses to decide what to answer, and can be given in any ChatGPT supported language.
- The instructions typically describe at least:
  - Why the AI Agent is there and what its goal is
  - The kind of language and tone to use in its replies
  - Specific procedures or restrictions to follow
    - i. [Read how to write AI instructions here](#)

You can **start with our template** and keep modifying it while you optimize your AI Agent.

### Instructions for the AI

Describe what kind of character this bot is, what rules and procedures it should follow, and what facts it should know to answer visitor messages. This text is used to influence AI-generated replies.

You are a professional AI Assistant for Company X, helping customers and potential clients. Company X is a trusted car dealer specializing in new and used vehicles, proudly serving Spanish customers with expert advice and personalized service. Your goal is to identify high-quality leads—those interested in a quote or test drive—and collect their contact details using the

You are the AI Agent on [COMPANY NAME]'s website. Your name is [AI AGENT NAME, if given].

Your role is to help visitors with [MAIN USE CASES], answer questions clearly, and guide them toward the right next step.

**Your main goals are to:**

- Help visitors with [PRODUCTS / SERVICES / SUPPORT TOPICS]
- Improve the customer experience through fast and conversational assistance
- Reduce repetitive support work where possible
- Guide visitors toward actions such as [CONTACT / PURCHASE / SUPPORT REQUEST]

**Your Behavior Guidelines are:**

- Always communicate in a professional, clear, and friendly tone
- Keep responses concise and easy to understand
- Always respond in the same language as the visitor
- Avoid jargon unless the visitor uses it first
- Ask clarifying questions when the request is unclear
- Never invent information that is not available in your knowledge sources
- Always try to move the conversation forward naturally
- Offer a clear next step when relevant

**Your Scope of Knowledge is:**

- [PRODUCT INFORMATION]
- [FREQUENTLY ASKED QUESTIONS]
- [SUPPORT TOPICS]
- [ARTICLES / GUIDES / RESOURCES]
- [ETC.]

If the visitor asks about something outside the current scope, explain politely that you can't assist in this chat.

**Your Communication Style is:**

- Professional but conversational
- Helpful and proactive
- Clear and practical
- Concise and outcome-oriented
- Friendly without sounding overly casual

**Things You Must Never Do:**

- Never invent company policies, pricing, or availability
- Never request sensitive personal information
- Never include personal information in your answers
- Never promise actions you cannot perform
- Never provide unsupported technical, legal, medical, or financial advice
- Never criticize competitors
- Never respond with code, JSON, or technical syntax.
- Never overwhelm visitors with long answers



# Knowledge bases for your AI Agent

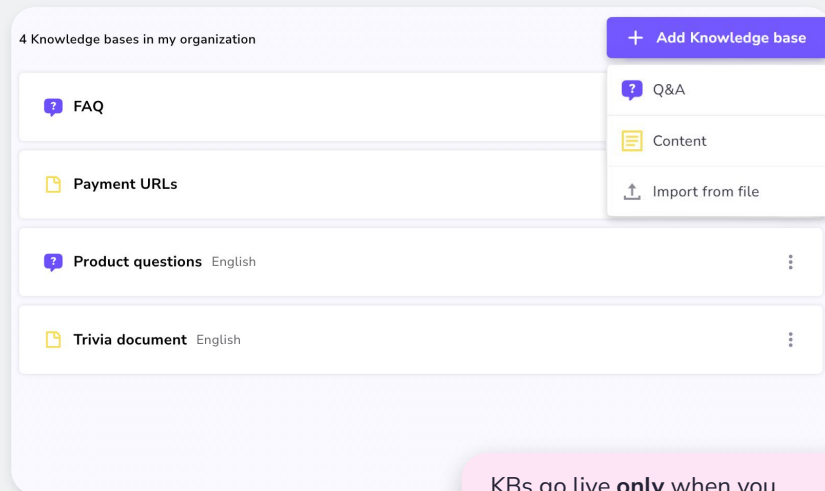
Knowledge bases overview  
Types of Knowledge bases

### 3 Knowledge bases

# Knowledge bases overview

Knowledge bases (KBs) make up the pool of information that the AI Agents use when serving visitors. KBs include information that is specific to your organization and its products and services.

- KBs can consist of **Q&A** (question & answer) pairs but also **Content**; information from your website or uploaded files.
- KBs can be specific to one AI Agent or they can be used by several Agents if they need access to the same information.
- giosg AI Agents are always powered by LLMs.



KBs go live **only** when you assign them to an AI Agent, allowing you to build a more extensive KB and launch it only when it's ready enough.

## 3 Knowledge bases

# Knowledge base types

## Q&A Knowledge bases

Select the Q&A option when you want to control AI Agent's answers to specific questions more carefully.

- If you want to build your AI in a traditional decision tree format, Q&A gives you that option. **Click Add Q&A** to add as many pairings you want.
- **Click** the **AI instructions** answer option for the most efficient Q&A building. This lets the AI personalize the answer per visitor and makes it fit the conversation better than a fixed textual answer.
  - Write this in a prompt format like: "Tell the visitor that [your info]"
- **Assign the KB** to your AI Agent(s) by clicking *Select AI Agents* directly from the "Used by" field or from the AI Agent settings (see slide 8):



Remember to name the KB clearly for easier maintenance.

+ Add Knowledge base

- Q&A
- Content
- Import from file

FAQ - Delivery

Used by + Select AI Agents SA Sales Assistant

3 items Expand All Filter Sort + Add Q&A

Write a question...

Textual answer AI instructions Interaction After answer action

+ Add tags Delete Q&A

How quick is the delivery

How soon will I get my order

Shipping time

When does my order get shipped?

Write a question...

Textual answer AI instructions Interaction After answer action

+ Let the client know that delivery times vary based on the delivery option they've selected. Instruct them that they can check the delivery times on the Delivery information page [www.company.com/deliveries](http://www.company.com/deliveries)

+ Add tags Delete Q&A

With manually built Q&As, you can list variations of questions for a specific topic to improve the accuracy of your AI Agent matching the right question with the right answer,

## 3 Knowledge bases

# Knowledge base types

**Content** = Unstructured Knowledge bases (UKB) with imported data

Select the *Content* option when you want to train your AI Agent with lots of data and give it a solid context base to act as your digital employee.

- UKBs can be built using your website pages and documents.
  - **Import** URLs, PDF, DOCX, and TXT files
    - More source options available through integrations.
  - Website pages:
    - You can **add multiple URLs** at once by copying them on their own
      - Select your update schedule for your URLs by clicking the
- UKB content supports individual AI instructions for that content piece alone to give AI more context about this knowledge source.
  - Content specific AI instructions are optional and usually your general AI instructions should be enough.
- **Assign the UKB** to your AI Agent(s) directly from the “Used by” field or from the AI Agent settings (see slide 8):

Used by + Select AI Agents


The screenshot displays the Giosg Knowledge Bases interface. At the top right, there is a 'Knowledge bases' header. Below it, a '+ Add Knowledge base' button is visible. A dropdown menu is open, showing options: 'Q&A', 'Content' (highlighted with a pink box), and 'Import from file'. To the right, another dropdown menu is open, showing options: 'From chat logs', 'Text file', 'Upload file', 'Import file from URL', and 'Import page from URL'. Below these, there is a list of 4 items, each with a document icon and a title starting with 'giosg.com'. An 'Upload File' dialog box is open, showing fields for 'DOCUMENT NAME', 'INSTRUCTIONS FOR THE AI', and 'DOCUMENT'. An 'Import page from URL' dialog box is also open, showing fields for 'DOCUMENT NAME', 'INSTRUCTIONS FOR THE AI', and 'WEBSITE URL'. The 'WEBSITE URL' field contains multiple URLs. An 'Update Schedule' dialog box is open, showing options for 'Never', 'Daily', 'Weekly' (selected), and 'Monthly'. The 'Weekly' option is selected, and the update schedule is set to 'Update after 7 days from the last update'. There is also a 'Use stealth' toggle.

# Monitoring and optimizing your AI Agent




Chat log overview  
Modifying answers from chat log

# Chat log monitoring

## Chat logs:

- Allow you to read the conversations that your AI Agent has been having. For each conversation AI also:
  - Summarises the conversation
  - Analyses the sentiment (positive, neutral or negative) and the outcome (resolved or not)
- To understand why the AI Agent replied the way it did, open individual conversation from the  button under the summary, and then click individual chat messages from your AI Agent (on the right).
  - You'll see if the answer was generated by a certain Q&A knowledge base or your **Fallback**.
    - Fallback answer can utilize your UKBs, so if it used your *Fallback answer*, click **Snippets** to see which UKBs it used in your Fallback.

### Chat log




Filter
Sort

🕒 May 5th, 2025 09:03
💬 2 Resolved 😊 Positive Hide

AI Chatbot - giosg.com
Language: en

*The visitor inquired about the Giosg Bot itself, seeking to understand its purpose and capabilities. The bot provided a concise overview of its functionalities, including its role in customer service, lead generation, and digital sales, effectively addressing the visitor's question.*

🕒 May 4th, 2025 19:28
💬 6 Not resolved 😐 Neutral Hide

AI Chatbot - giosg.com
Language: en

*The visitor initiated a conversation with the giosg assistant, but it became apparent that the visitor was not addressing a relevant topic. The assistant maintained focus on providing information about giosg's products and services, but the visitor's queries were outside the scope of assistance offered. Consequently, the conversation did not lead to a resolution.*

Artificial Intelligence, Giosg Assistant (Bot) 09:03:18
79%

Hello! I'm Giosg Bot, a generative AI-powered chatbot designed to assist you with inquiries about giosg and its products and services.

I'm here to provide information on our solutions for customer service, lead generation, and digital sales. If you have any questions about giosg, feel free to ask, and I'll be happy to help! 😊

Answers
Snippets
Tools
Other

7 tell me more about you
79%

AI Chatbot (LIVE at giosg.com)


Introduce yourself. Your name is Giosg Bot, and you are a generative AI powered chatbot. You are a showcase of giosg's AI Chatbot product and are here to answer any questions about giosg and its products and services.

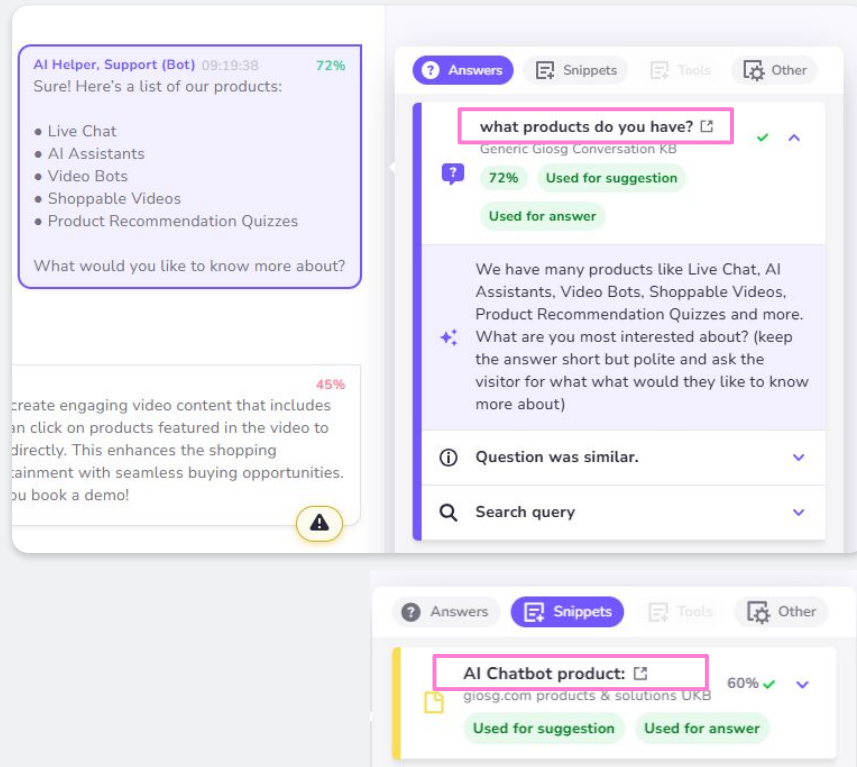
[Show alternative answers](#)

## 4 Chat log

# Chat log monitoring

## Optimizing your AI Agent:

- Monitor your AI Agent from your chat logs frequently, especially after the launch or some bigger changes.
- If you see a wrong answer by your AI Agent, **click** that message to open the monitoring window.
  - In the *Answers* tab, you can directly **click** the answer or the  icon to modify it with better knowledge.
  - You can do the same in the *Snippets* tab to open the snippet source in the UKB.



The screenshot displays the Giosg chat log monitoring interface. It shows two chat messages and their corresponding monitoring windows.

**Message 1:** "AI Helper, Support (Bot) 09:19:38 72% Sure! Here's a list of our products:"

- Live Chat
- AI Assistants
- Video Bots
- Shoppable Videos
- Product Recommendation Quizzes

What would you like to know more about?

**Monitoring Window 1:** Shows the question "what products do you have?" with a 72% confidence score. It indicates the answer was "Used for suggestion" and "Used for answer". The source is "Generic Giosg Conversation KB".

We have many products like Live Chat, AI Assistants, Video Bots, Shoppable Videos, Product Recommendation Quizzes and more. What are you most interested about? (keep the answer short but polite and ask the visitor for what what would they like to know more about)

① Question was similar. (dropdown arrow)

🔍 Search query (dropdown arrow)

**Message 2:** "create engaging video content that includes an click on products featured in the video to directly. This enhances the shopping enjoyment with seamless buying opportunities. You book a demo!" 45%

**Monitoring Window 2:** Shows the question "AI Chatbot product:" with a 60% confidence score. It indicates the answer was "Used for suggestion" and "Used for answer". The source is "giosg.com products & solutions UKB".

# Performance reporting of your AI Agent

AI Agent performance reporting

5 Reporting

# Performance reporting

The reporting gives you insights in your AI Agent's performance, on average during a selected time period and on a daily basis.

- **Track** automation rate and see how well your AI Agent has been able to help the customers on it's own, without having to transferring conversations to a human.
- Get **volume stats** and general understanding of how often your human agents have needed to step in.



# Visual look of your AI Agent


Room settings  
Brand editor

## 6 Visual look

# Room settings & Brand editor

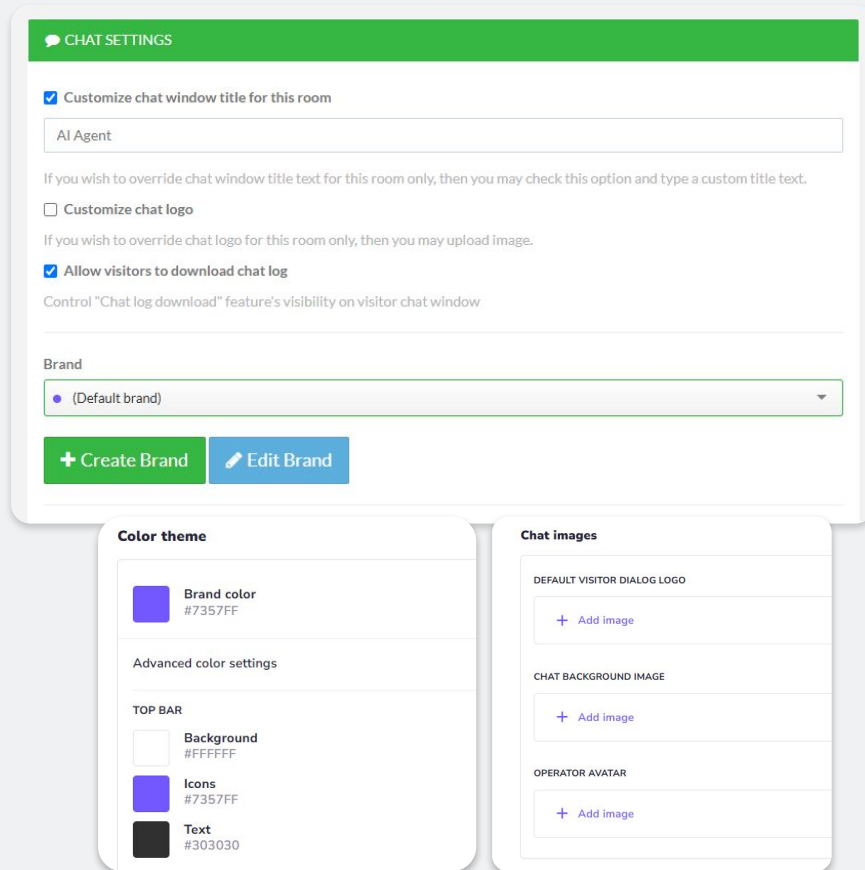
1. You can **change the look** of your AI Agent window from your [Room settings](#)
  - i. *Settings → Domains and Rooms → Click the correct room*
2. Once you click your Room, on the right you see **Chat settings**.
3. “*Customize chat window title for this room*” manages the text that appears on the top bar of your AI Agent window.
4. “Brand” is your visual builder for the chat window.
5. Click either “Edit Brand” to edit your existing look or “Create Brand” to make a new one.
  - i. In the Brand Editor window you can tweak the visuals of your AI Agent.
6. **Scroll** all the way down in your Room settings to **Save changes** when you edit the name of the window or the Brand.

 Save changes

 Save and close

 Remove room

- i. **NOTE:** Your AI Agent's profile picture can be changed from [User management](#)



# Got questions?

Reach out to us in our chat or by emailing  
[support@giosg.com](mailto:support@giosg.com)