



giosg AI Assistant guide

Helping you get started with managing and monitoring your AI assistants



Content

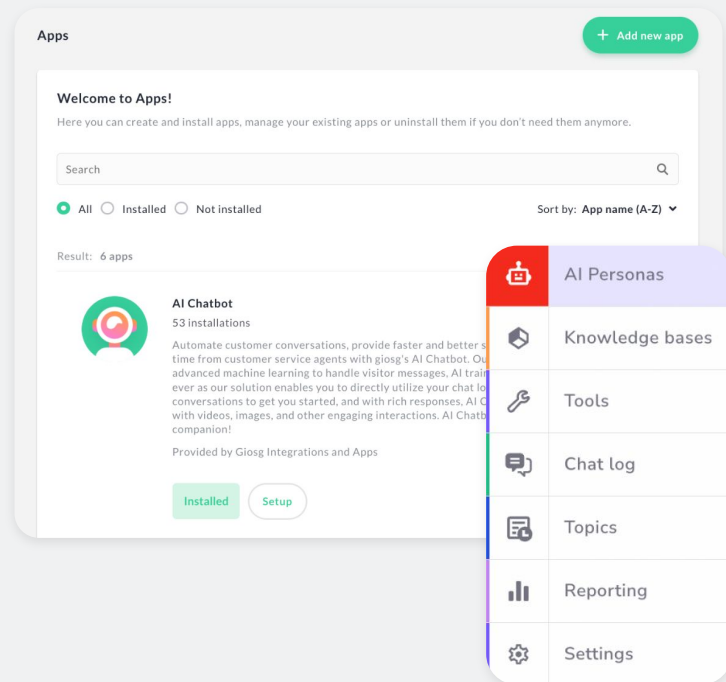
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- 2 AI Assistants and their personas
- 3 Knowledge bases with relevant data
- 4 Monitoring with Chat logs
- 5 Performance reporting

Getting started

1 Getting started

Accessing the Chatbot app

- Head to Settings → Apps → AI Chatbot → **Setup** or go directly to <https://chatbot.giosg.app/bots>
- In the Chatbot app, you will find all the settings, instructions and knowledge that has been assigned to your AI Assistant(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 Assistants and their personas

AI Personas overview

AI Persona settings

AI Personas overview







AI personas are individual AI Assistants with their defined service roles, instructions and sets of Knowledge bases. You can see them as your AI powered colleagues - with their own personalities, ways of working and knowledge!

Create new and manage existing AI Personas


- Get an overview of your different AI Personas
 - Which ones are live?
 - What kind of assistants are they working as?
 - Which rooms are they working in?
 - Which Knowledge bases do they use?
- Having many AI Personas allow you to have AI Assistants that work differently in different environments.

3 AI Personas in my organization

+ Add AI persona

	NAME	ROOMS	KNOWLEDGE BASES	
	Support Assistant CHATBOT & COPILOT	Bot room	FAQ Payment URLs Product questions Trivia document	
	Sales Assistant OFFLINE	No rooms selected	Product questions	
	Agent Assistant COPILOT	Chat room	FAQ	

AI Persona settings

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

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

AI Persona

NAME AND APPEARANCE

FIRSTNAME

Support

LASTNAME

Assistant

ALIAS

Andy the Assistant

SERVICES ONLINE

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

☒ Converse with visitors (Chatbot)

☒ Suggest replies to Service Agents (Copilot)

☐ Also Suggest replies to agents from partner organizations collaborating in the same room(s)

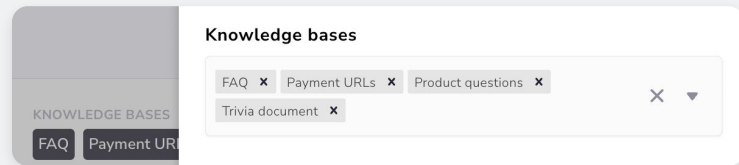
AI Persona settings

Knowledge bases

Determine which Knowledge bases the AI Assistant should use when it is answering questions (see slide [13](#)).

- The AI Assistant only has access to information that can be found in the Knowledge bases that have been assigned to it.
- The same Knowledge bases can be used by many AI Assistants or they can have their own individual ones.

AI Assistants are always powered by ChatGPT .



AI Persona settings

Fallback behavior

- The fallback behavior defines how your AI assistant acts when it can't find an answer to the visitor's question using the information in its knowledge bases.

Fallback behavior

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

Textual answer AI instructions

Interaction After answer action

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

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

TOOLS

Transfer chat to Human

Store search

+ Add Tool

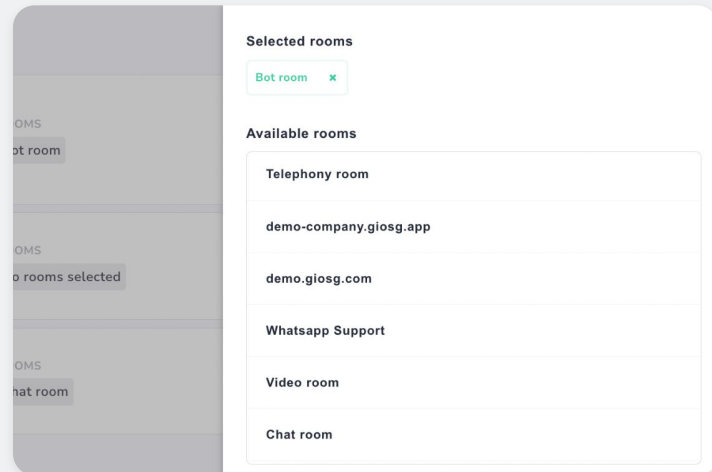
Fallback instructions depend heavily on the type of AI assistant you have and its configuration, and can look very different to these examples.

2 AI Personas

AI Persona settings

Room(s) the AI Assistant will work in

- Choose which room(s) the AI Assistant will work in and add them to Selected rooms.
- When the Service type (see slide [Z](#)) has been selected and rooms have been defined, your AI Assistant starts joining new conversations and working in them.



If you want your AI Assistant to serve as an external chatbot also when humans are available, also add it to the [Router](#) of the room. Read more [here](#).

AI Persona settings

Instructions for the AI Assistant

- The instructions are the description of your AI Assistant and of 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 Assistant is there and what is it striving for
 - Basic useful knowledge about the organization it represents
 - The kind of language and tone to use in its replies
 - Specific procedures or restrictions to follow



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 provided tools. You respond in Spanish, French, or English, based on the visitor's language. If another language is used, reply in English. Use emojis sparingly and write no more than 4 sentences per message. Answer only using your internal database. If you don't have the answer, follow fallback guidelines. Never compare Company X to competitors or comment on political, religious, or social issues. In such cases, explain that you're here to assist with Company X questions only.

Delete

Delete this AI Persona and all its connections



Delete AI Persona

Knowledge bases with relevant data

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 Assistants use when serving visitors. KBs include information that is specific to your organization and its products and services.

- KBs can consist of Q&A pairs but also information from your website or uploaded text documents.
- KBs can be specific to one AI Assistant or they can be used by several Assistants if they all need access to the same information.
- giosg AI Assistants are always powered by ChatGPT .



4 Knowledge bases in my organization

+ Add Knowledge base

? FAQ

? Add Q&A manually

Payment URLs

Use chat logs

? Product questions English

Import data

Trivia document English

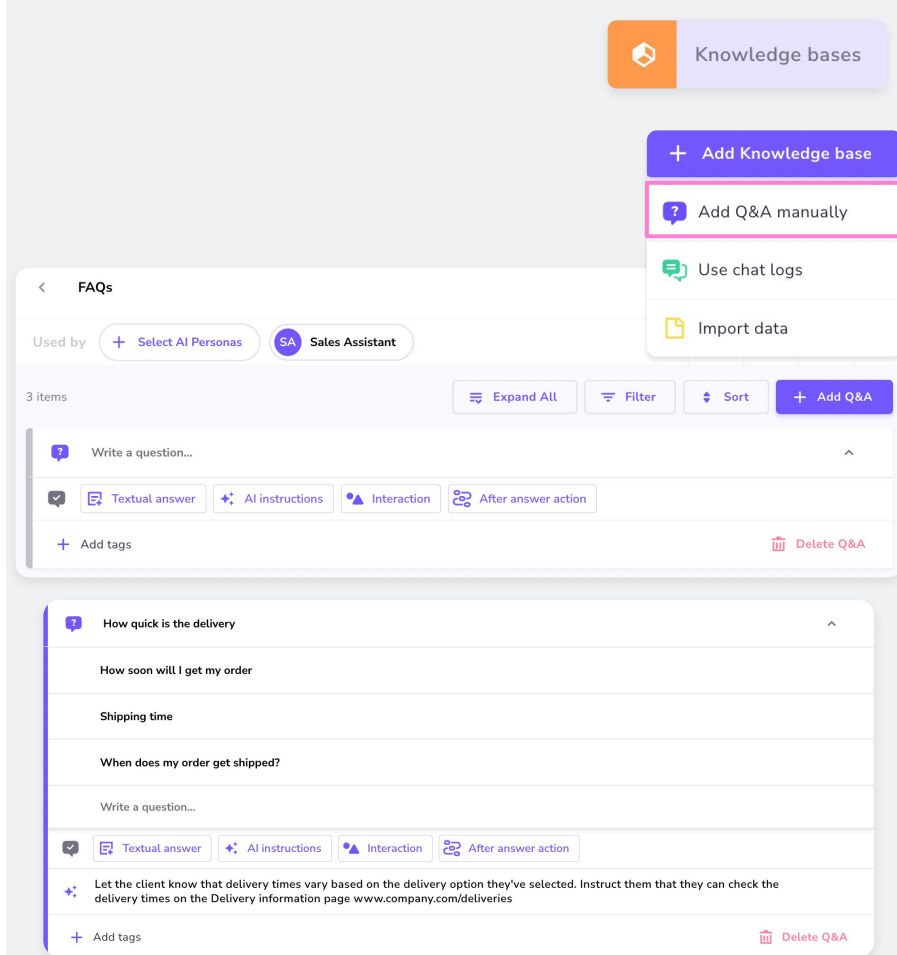
KBs go live only when you assign them to an AI persona, allowing you to build a more extensive KB and launch it only when it's ready enough.

3 Knowledge bases

Knowledge base types

Q&A Knowledge bases

- Q&A KBs give you the chance to enter precise knowledge and instructions, giving you more exact control of how the AI works with particular inquiries.
- With manual Q&As you list variations of questions for a specific topic and instruct your AI Assistant on answering them.
 - If you want it to always use an exact answer, you can provide an exact textual answer.
- Remember to name the KB clearly for easier maintenance. You can assign the KB to your AI Assistant(s) directly from the “Used by” field in the KB or from the AI Persona settings (see slide [8](#)).

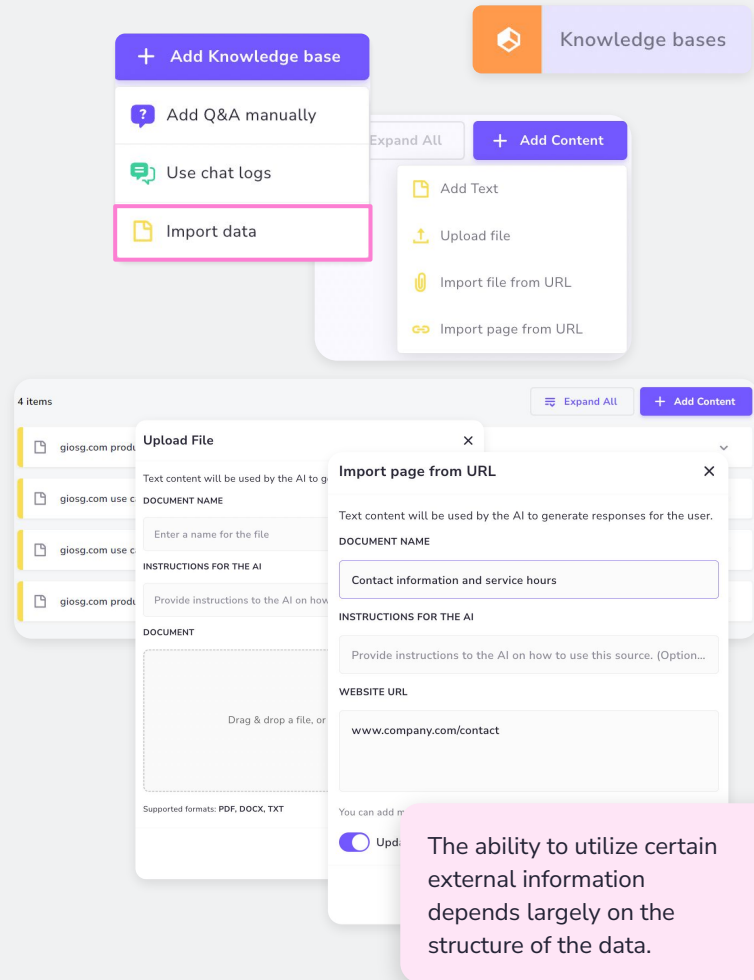


3 Knowledge bases


Knowledge base types

Unstructured Knowledge bases with imported data

- KBs can be built with data that is available on your website and in separate documents.
 - Create text files or directly upload your own files
 - Give the AI Assistant access to web page content by importing selected URLs
- Unstructured KBs can be assigned to the AI Assistant directly with necessary instructions, and/or be instructed in Q&A instructions.



Monitoring with Chat logs

- Allow you to read the conversations that your AI Assistant has been having. For each conversation AI also:
 - Summarises the conversation
 - Analyses the sentiment (positive, neutral or negative) and the outcome (resolved or not)
- Help you understand why the AI Assistant replied the way it did, when you click on the  icon.
 - You'll see if the answer was generated by a certain Q&A, from the fallback

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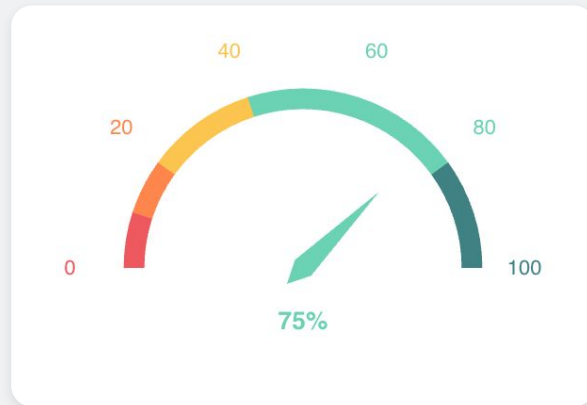
Track AI Assistant performance

5 Reporting

Performance reporting

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

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



TIME	CHATBOT ONLY %	CHATBOT & AGENT %	AGENT ONLY %	CHATBOT-SUPPORTED CHATS RATIO %	"CHATBOT ONLY" EXCLUDING AGENT ONLY CONVERSATIONS %
2025-04-28	75	25	0	100	75

Got questions?

Reach out to us in our chat or by emailing
support@giosg.com