

Admin Documentation

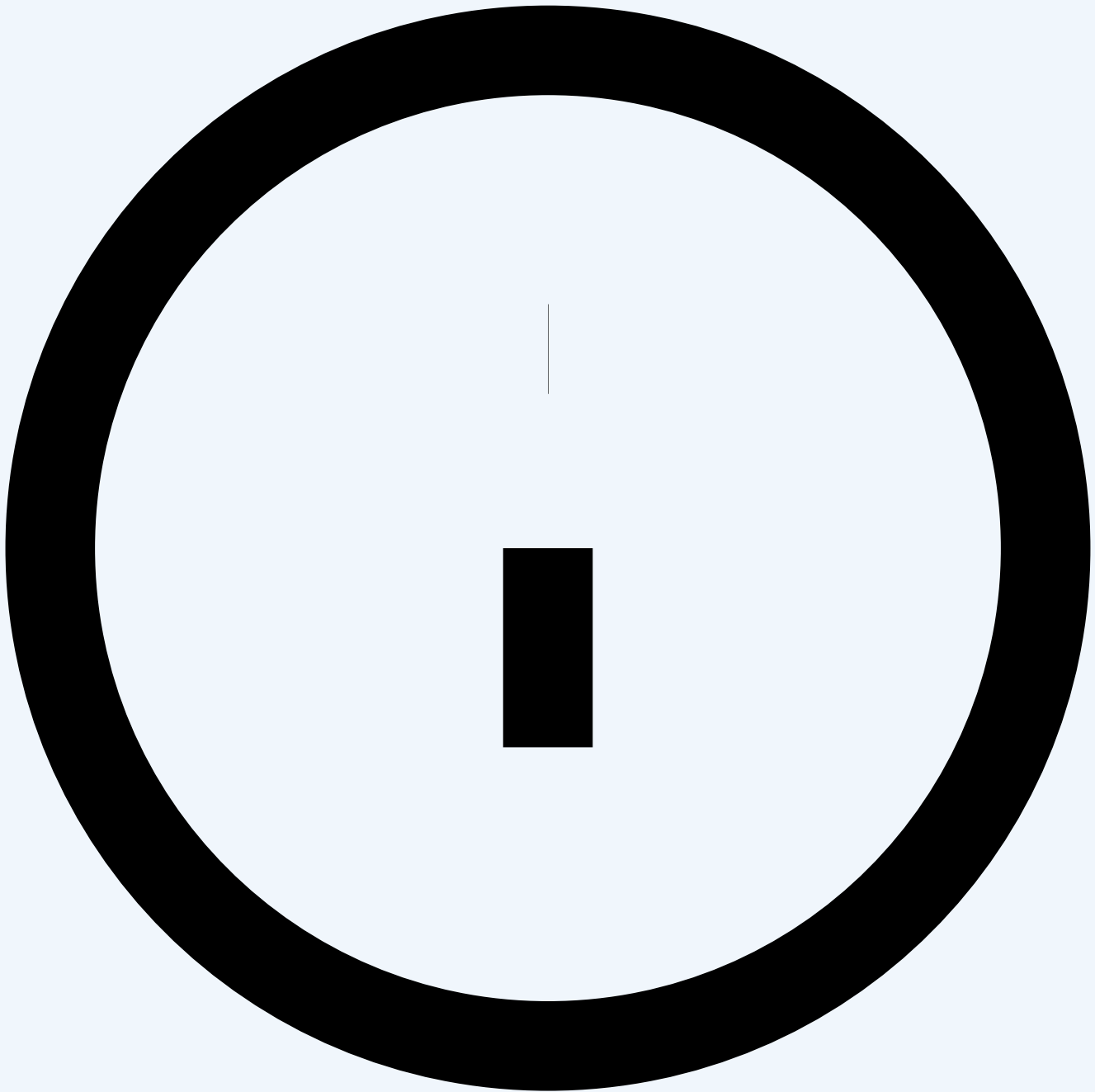
Tenant Setup & Configuration Guide

A complete walkthrough for creating and configuring a tenant — from basic information and AI model selection to personality, response behavior, and deployment mode.

⌚ ~15 min setup

🔑 Admin access required

📖 9 Steps

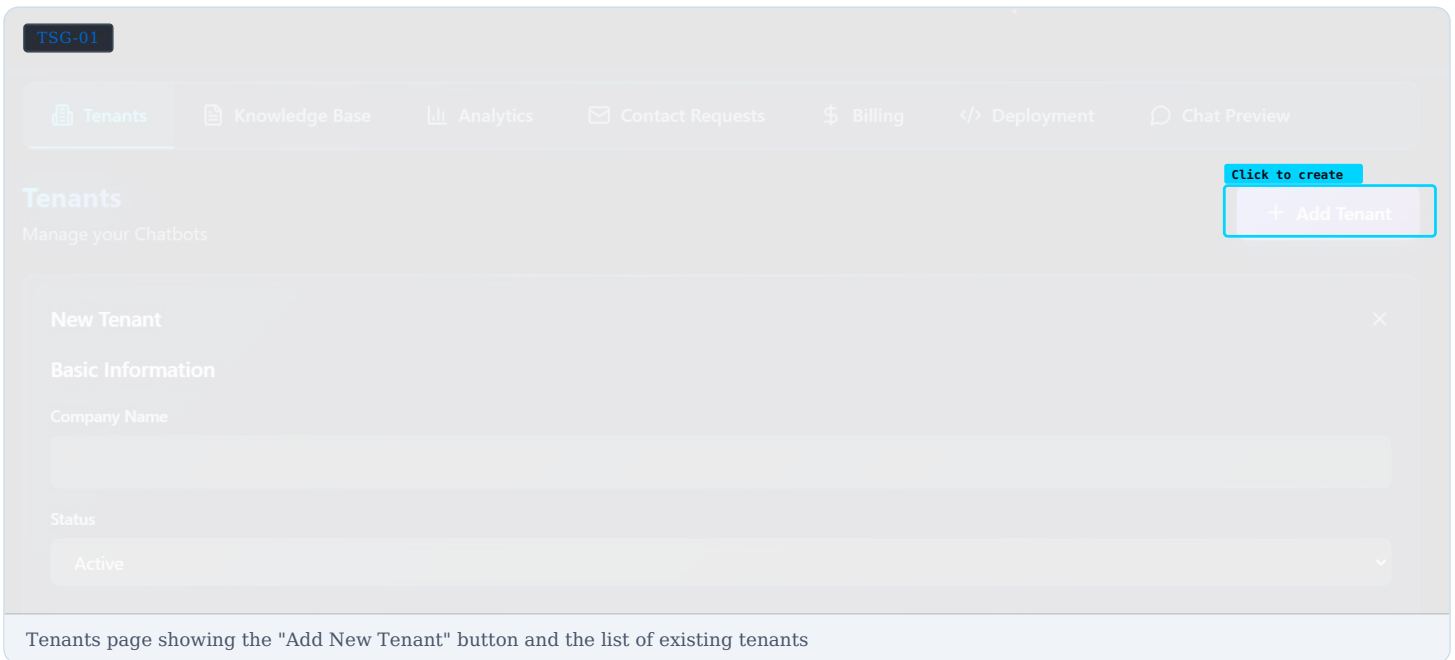


Overview A **tenant** represents a single client or organization on your platform. Each tenant has its own chatbot configuration, knowledge base, branding, and access settings. Follow this guide from start to finish to configure a tenant correctly before deploying any widget or internal portal.

STEP 01

Create a New Tenant

1. Log in to the platform as an **Admin**.
2. Navigate to **Tenants** from the main dashboard.
3. Click the **"Add New Tenant"** button.
4. The tenant configuration form will open — continue through each section below.



The screenshot displays the 'Tenants' management interface. At the top, a navigation bar includes 'Tenants', 'Knowledge Base', 'Analytics', 'Contact Requests', 'Billing', 'Deployment', and 'Chat Preview'. The 'Tenants' section is active, showing a 'Click to create' callout and a '+ Add Tenant' button. Below this, a 'New Tenant' form is open, featuring a 'Basic Information' section with a 'Company Name' text input field and a 'Status' dropdown menu currently set to 'Active'. A caption at the bottom of the screenshot reads: 'Tenants page showing the "Add New Tenant" button and the list of existing tenants'.

STEP 02

Basic Information



Company Name **Required**

Enter the full name of the client company. This name appears throughout the platform and in the chatbot header.

Example: Acme Corporation



Status

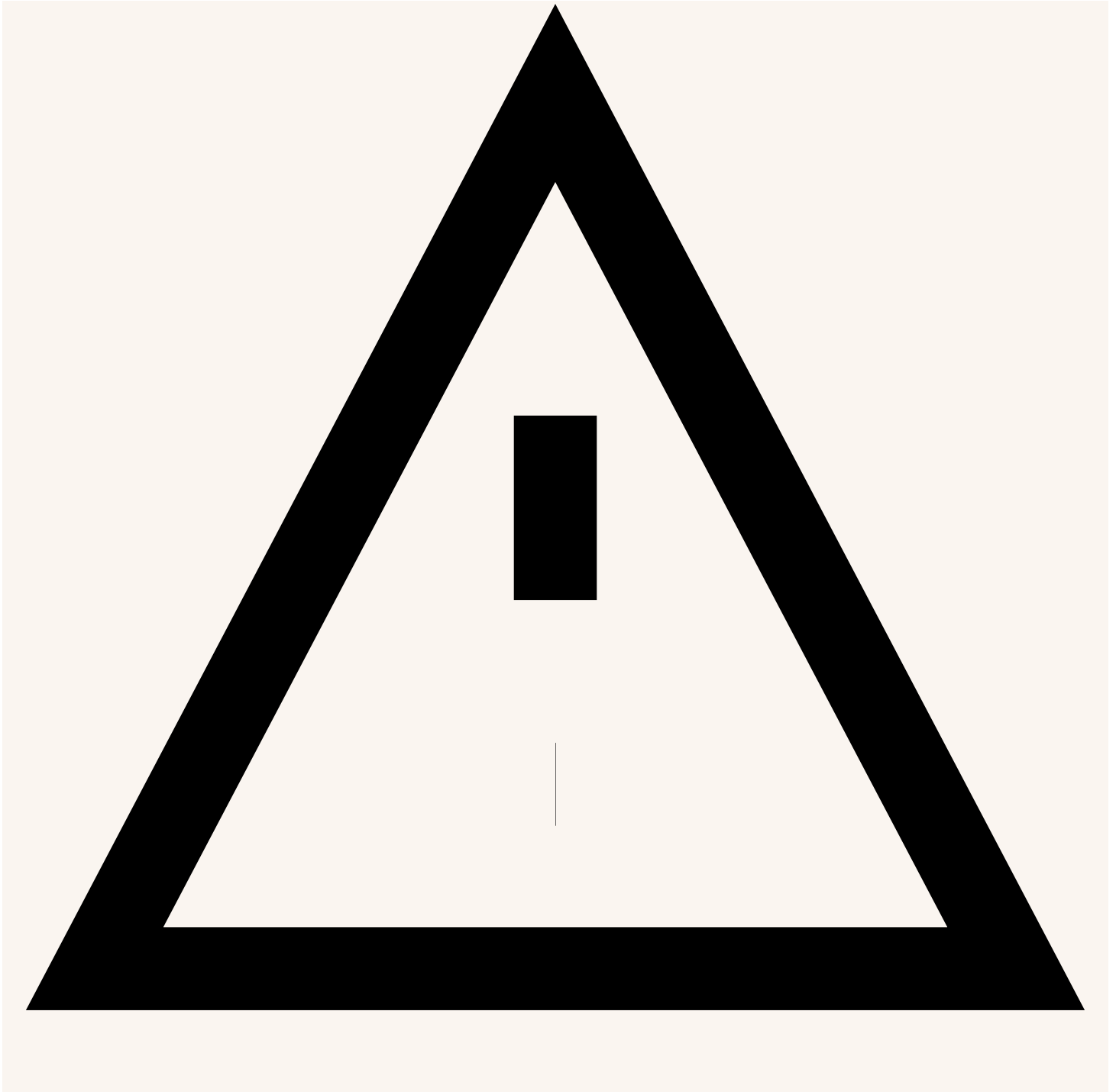
Controls whether the tenant is live and accessible.

Option	Description
Active	Tenant is live; chatbot responds normally
Inactive	Tenant is disabled; chatbot will not respond

Top of the tenant form showing the Company Name field and the Status dropdown set to "Active"

STEP 03

Company Information & Knowledge Context



Most Important Field The System Context is the single biggest factor in response quality. Invest time writing a thorough, accurate description of the client's business.

Write a detailed description of the company so the AI understands the business context. Include what the company does, who they serve, key products or services, important policies, and industry-specific terminology.

What to Include

- What the company does and who they serve
- Key products or services offered
- Important policies or processes customers frequently ask about
- Industry terminology or jargon specific to the business

[Example System Context](#)

We are an HR software company that provides employee onboarding tools for mid-size businesses. Our main product helps companies automate their hiring process, track new hire paperwork, and manage benefits enrollment. We serve companies with 50-500 employees in the US and Canada. Common questions involve benefits enrollment windows, I-9 documentation, and our onboarding portal login process.

TSG-03
About Your Company
 Tell your chatbot about your business, products, and services. This helps it give accurate, relevant answers.

Company Information

Example: We're an HR software company that provides employee onboarding tools for mid-size businesses. Our main product helps companies automate their hiring process...

Include: What you do, who you serve, key products/services, and any important policies or information

The System Context textarea filled in with an example company description

STEP 04

Chatbot Personality

Using a Template (Optional)

Toggle "**Use a template to get started faster**" to browse pre-built personality presets organized by industry. Selecting a template auto-fills the personality and instruction fields, which you can then customize.

TSG-04
Chat Assistant Personality
 Configure how your chat assistant greets visitors and responds to questions

Template shortcut

Use a template to get started faster

Personality Style

Professional - Courteous and business-like

Response Guidelines

Examples:

- Keep answers brief (2-3 sentences) unless asked for details
- Always be empathetic and understanding
- If you don't know something, admit it instead of guessing
- Offer to connect with our team for complex questions

Tell your chatbot how to respond: tone, length, what to do when uncertain, etc.

Template selector panel showing a grid of available chatbot templates organized by industry

Personality Style

Option	Description	Best For
Professional	Courteous and business-like	Customer support, B2B (recommended default)
Friendly	Warm and approachable	Retail, consumer brands
Casual	Relaxed and conversational	Lifestyle, community products
Technical	Precise and detail-oriented	Dev tools, SaaS, IT helpdesk

Response Guidelines

Use this field to give the chatbot specific behavioral instructions — how long answers should be, what to do when uncertain, topics to avoid, and escalation behavior.

Example Response Guidelines

- Keep answers concise (2–3 sentences) unless the user asks for detail
- Always be empathetic and understanding
- If you don't know something, say so rather than guessing
- Collect the customer's name and email before escalating to support
- Never discuss competitor products or pricing

TSG-05 Chat Assistant Personality

Configure how your chat assistant greets visitors and responds to questions

Use a template to get started faster

Personality Style

Professional - Courteous and business-like

Response Guidelines

Examples:

- Keep answers brief (2-3 sentences) unless asked for details
- Always be empathetic and understanding
- If you don't know something, admit it instead of guessing
- Offer to connect with our team for complex questions

Tell your chatbot how to respond: tone, length, what to do when uncertain, etc.

Personality Style dropdown and Response Guidelines textarea filled in with example content

STEP 05

Advanced Settings — AI Provider & Model

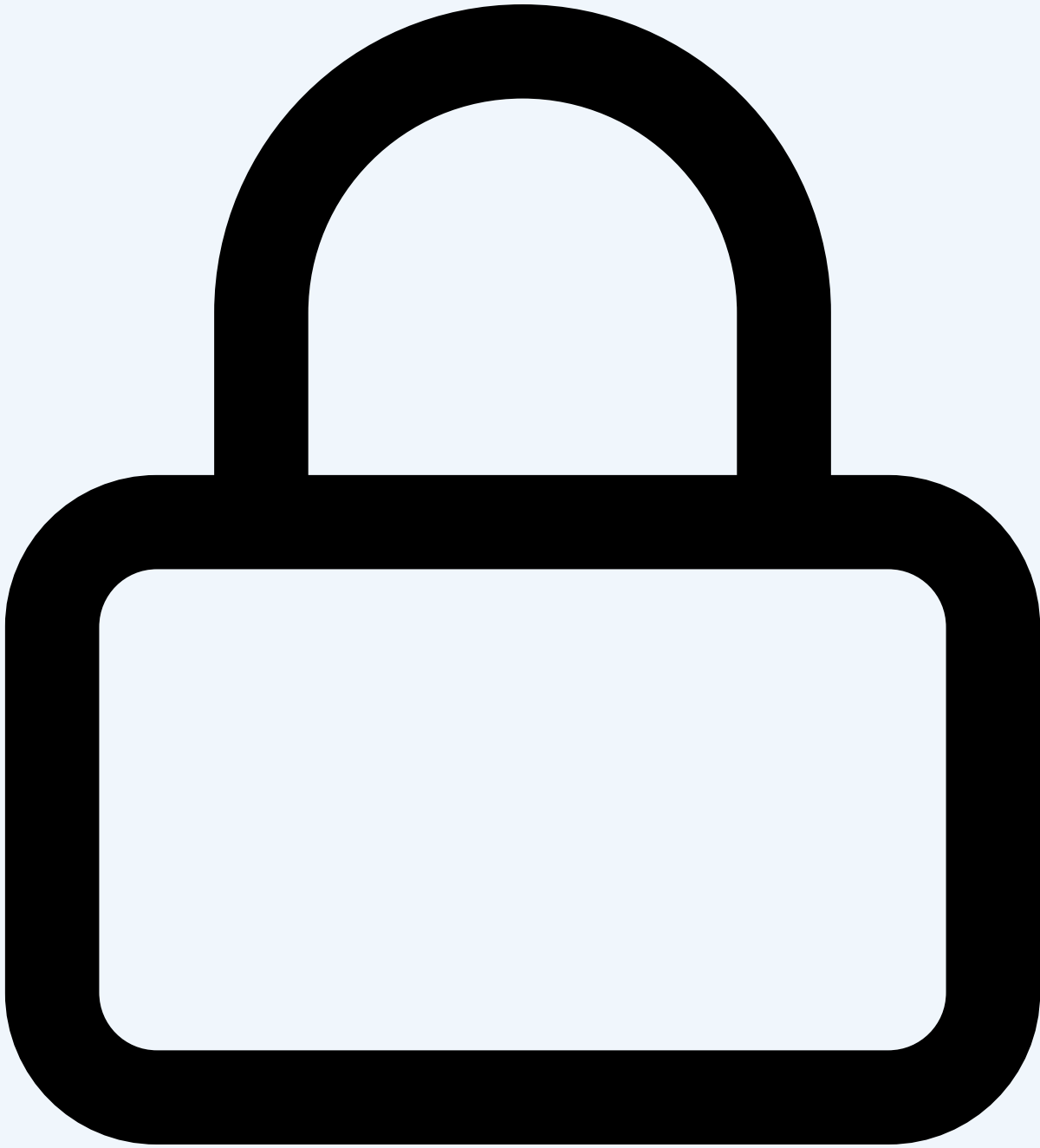
Click "**Advanced Settings**" to expand this section. Select which AI service powers this tenant's chatbot and which specific model to use.

Provider	Description	Trial Access
OpenAI	Powered by GPT model family	Available
Anthropic	Powered by Claude model family	Upgrade Required

OPENAI MODELS	
GPT-5.2 Pro	Highest
GPT-5.2	High
GPT-5	High
GPT-5 Mini	Medium
GPT-4o	Medium
GPT-4o Mini	Low
GPT-5 Nano	Lowest

ANTHROPIC (CLAUDE) MODELS	
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Claude Opus 4.5	Highest
Claude Sonnet 4.5	Medium
Claude Haiku 4.5	Low
Claude 3.5 Sonnet	Medium
Claude 3.5 Haiku	Low



Trial Plan Restriction Trial accounts are locked to **GPT-5 Nano**. A lock icon will appear next to these fields. Upgrade your subscription to unlock all models and providers.

Custom API Keys (Optional)

Leave these fields empty to use the platform's shared API key (recommended for most deployments). Provide a client's own API key only if they require separate billing or usage isolation.

OpenAI Key

Starts with `sk-...`

Anthropic Key

Starts with `sk-ant-...`

TSG-06 Advanced Settings
AI model, API keys, and response behavior

AI Provider & Model

AI Provider
OpenAI (GPT)

AI Model
GPT-5 Nano

More advanced models provide better responses but cost more per message.

OpenAI API Key (Optional)
sk-...

Leave empty to use system default

Anthropic API Key (Optional)
sk-ant-...

Leave empty to use system default

The AI Provider dropdown set to "OpenAI" and the AI Model dropdown open showing the full model list with the recommended option starred

STEP 06

Response Behavior

Response Creativity (Temperature)

A slider from 0.0 to 1.0 that controls how varied or predictable the AI's responses are. Default is **0.7**.

Range	Effect	Recommended For
0.0 - 0.3 <small>Low</small>	Very consistent, same-style answers	Legal, compliance, factual support bots
0.4 - 0.6 <small>Medium</small>	Balanced — slightly varied but reliable	General customer support
0.7 - 1.0 <small>High</small>	More creative, varied phrasing	Conversational assistants, brand voices

Smart Summaries

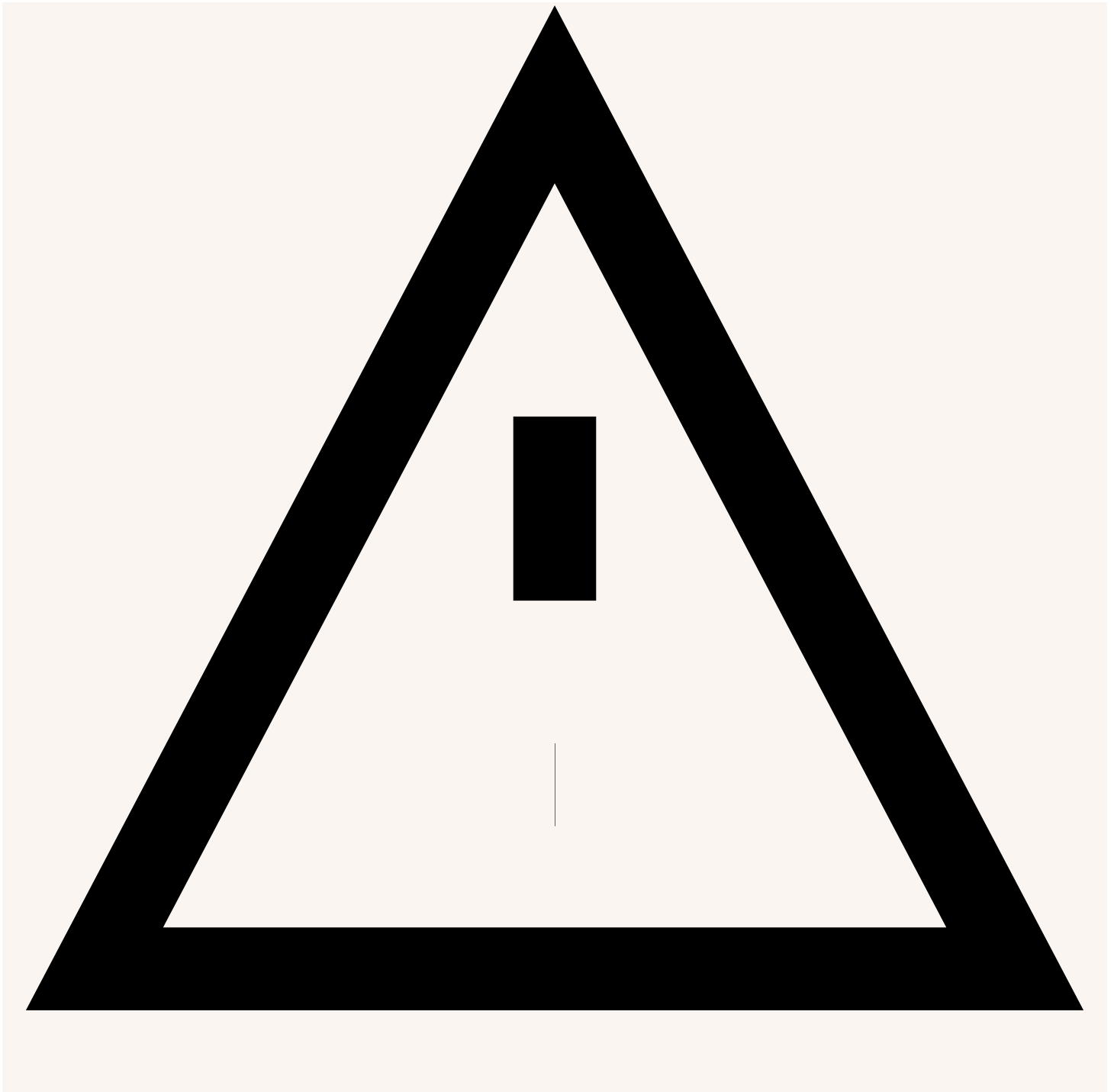
When enabled, the chatbot reads your knowledge base and explains information **in its own words**. When disabled, it quotes directly from the source material.

- **Default: Enabled** — recommended for most deployments
- Disable only if verbatim accuracy is required (legal, compliance, regulated industries)

The screenshot shows a configuration panel for 'Response Behavior'. It includes a 'Response Creativity' slider set to 0.7, a 'Focus' dropdown menu, and a checked checkbox for 'Smart Summaries (Recommended)'. Below the checkbox, there is a note: 'Chat assistant understands and explains in its own words. If disabled, it quotes directly from knowledge base.' A caption at the bottom of the screenshot states: 'The Response Creativity slider set to 0.7 and the Smart Summaries checkbox in the enabled state'.

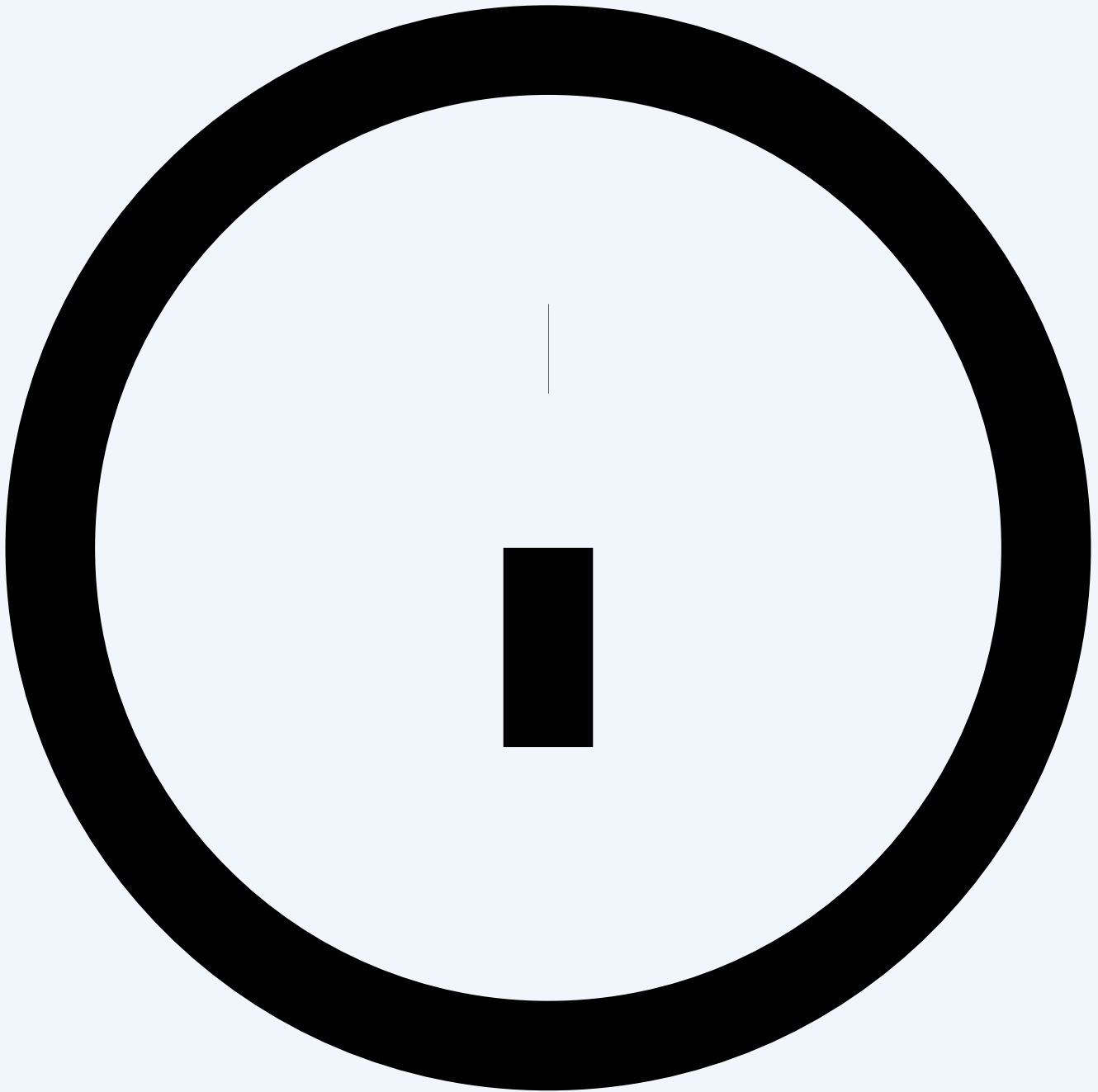
STEP 07

Deployment Mode

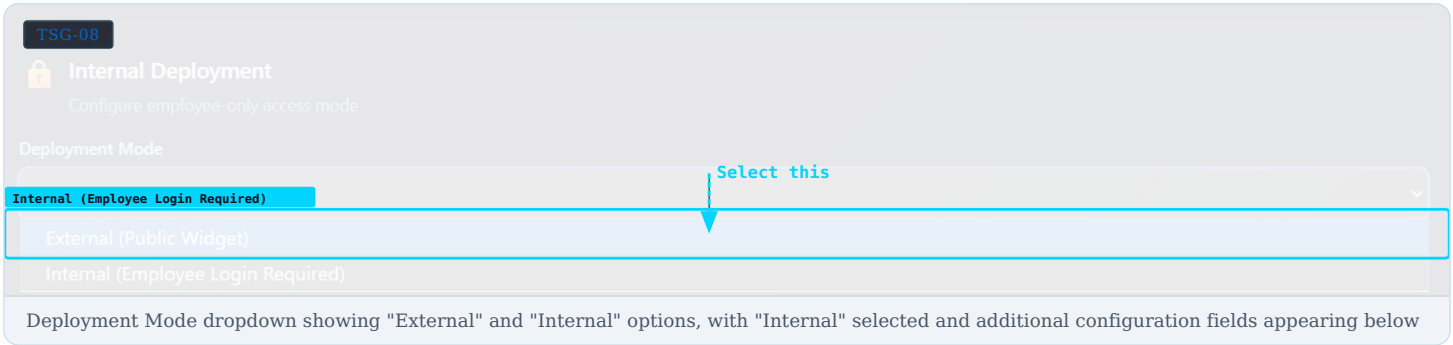


Important Choice This setting determines how customers or employees access the chatbot and drives the rest of your setup. Choose carefully — the platform currently supports one mode per tenant.

Mode	Best For	Access Method
External Default	Public-facing customer support, sales chat on a website	Embedded widget or standalone URL
Internal	Private employee portal — HR, IT helpdesk, onboarding	Login-protected portal with access codes



Need Both Modes? Create two separate tenants — one set to External, one set to Internal. Each operates independently with its own knowledge base and configuration.

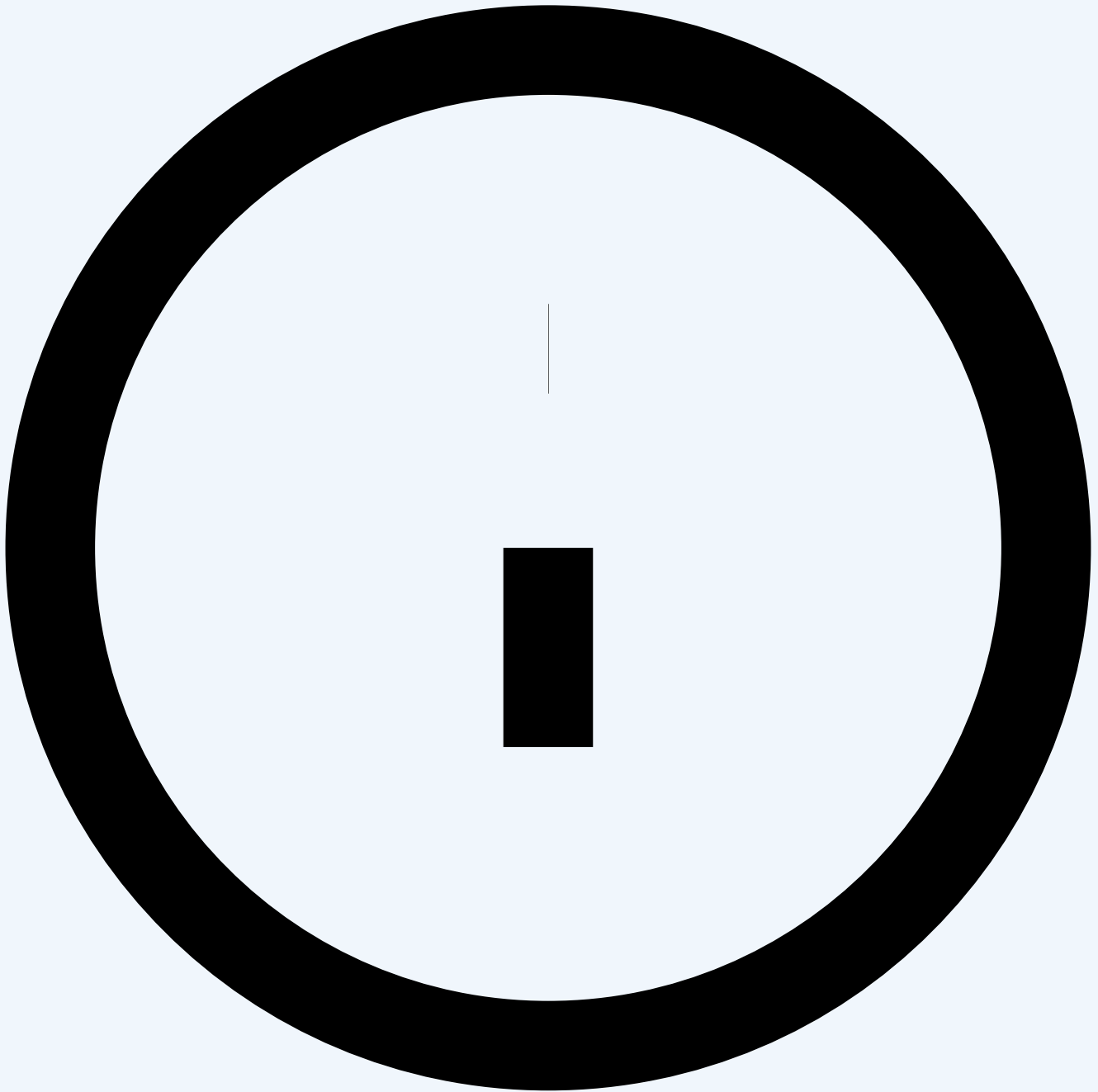


STEP 08

Internal Deployment Settings

These fields only appear when Deployment Mode is set to **Internal**.

Field	Description	Example
Allowed Email Domains	Restrict portal access to employees with company email addresses. Enter one or more domains separated by commas. Leave empty to allow any email (not recommended).	company.com , subsidiary.com
Employee Self-Registration	When enabled, employees can initiate sign-in with their email. When disabled, only admins can provision access.	Default: Enabled
Internal Portal Title	Heading shown on the employee login page. Defaults to the tenant's company name if left empty.	Employee Knowledge Assistant
Internal Portal Subtitle	Short tagline shown below the title on the login page.	Ask questions about HR policies, IT support, and more



Access Codes are Created Separately After saving the tenant, individual employee access codes are managed in the **Access Code Management** section. See the *Internal Employee Portal Setup Guide* for full instructions.

TSG-09 Internal Deployment
Configure employee-only access mode

Deployment Mode

Internal (Employee Login Required)

External: Public widget for website visitors
Internal: Private portal for employees only

Allowed Email Domains
Allowed email domains
company.com, subsidiary.com

Self-registration domains can access. Separate multiple domains with commas.
 Allow employee self-registration
Self-registration only available for internal deployment

Portal Title
Internal Portal Title
Employee Knowledge Assistant


Portal Subtitle
Internal Portal Subtitle
Ask questions about company policies, HR, IT support

The Internal Deployment settings section showing all four fields filled in with example values

STEP 09

Save the Tenant

- Click **"Create Tenant"** for new tenants, or **"Update Tenant"** when editing an existing one.
- A green success message confirms the save: *"Tenant created successfully!"*
- If an error occurs, a red message will describe the issue.

 **TSG-10**
Screenshot

The form submit button and the green success notification after saving the tenant

NEXT

After Setup — What to Do Next

Build the Knowledge Base

Upload documents, add URLs, or enter text so the chatbot has accurate information to draw from.

Deploy the Widget

Generate a deployment token and get embed code. See the *External Widget Deployment Guide*.

Set Up Internal Portal

Create employee access codes and share the portal URL. See the *Internal Portal Setup Guide*.

Review Analytics

Monitor chat volume, session quality, and handoff rates after the tenant goes live.

Common Questions

?

Can I change the AI model after the tenant is live?

Yes. Go back to the tenant settings at any time and update the AI Provider or Model. Changes take effect immediately on the next chat message — no downtime required.

?

What happens if I leave the API key fields empty?

The platform's default API key is used. This is the recommended approach for most deployments, unless the client requires their own billing or usage isolation.

?

Can I have both an external widget and an internal portal for the same tenant?

Deployment Mode must be set to either External or Internal per tenant. If you need both, create two separate tenants — one for each mode. Each operates independently with its own knowledge base and settings.

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What does deleting a tenant do?

Deleting a tenant permanently removes all associated data: knowledge base documents, chat history, widget tokens, and access codes. **This action cannot be undone.** A confirmation prompt will appear before deletion proceeds.