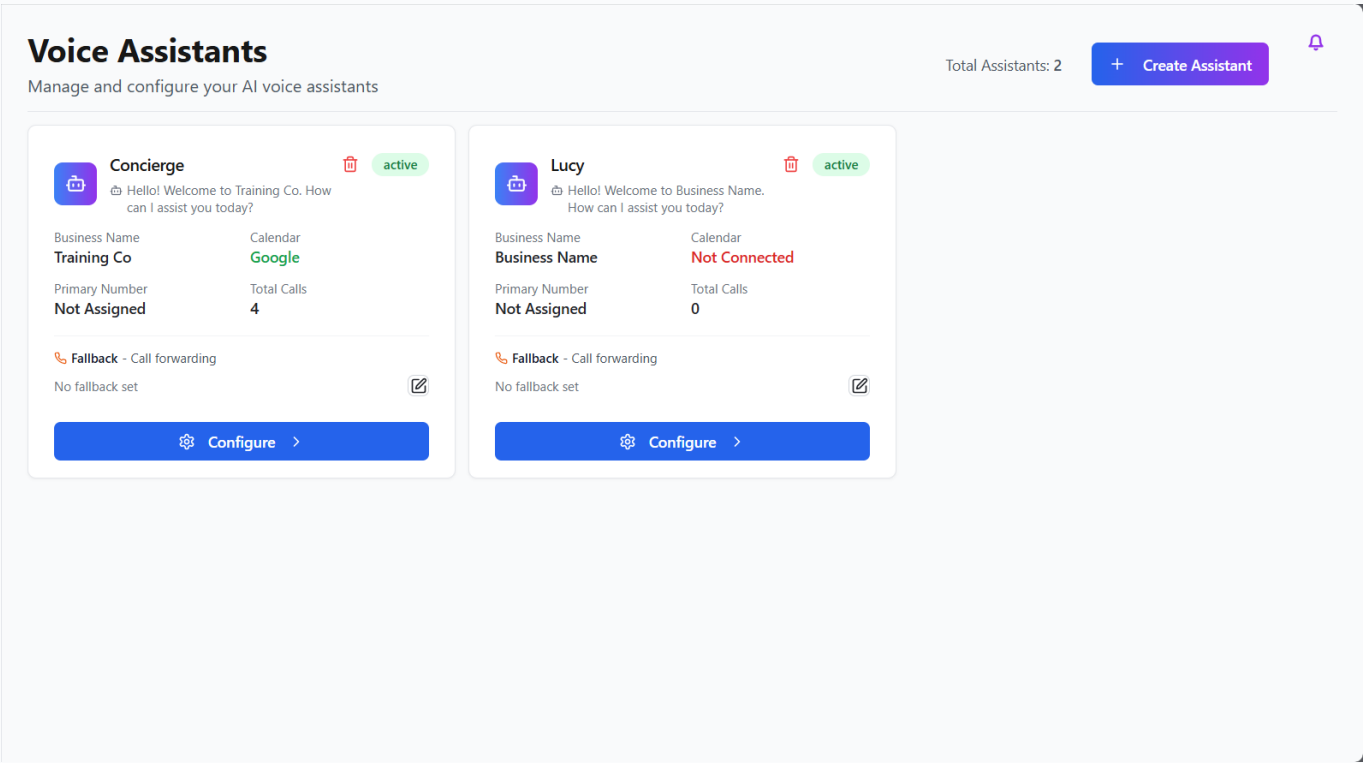


Assistants

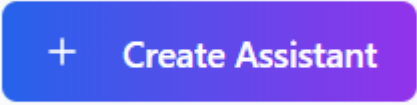
The Assistants section of the AI Concierge Portal is where you create and manage your AI assistants.

The Assistant Dashboard

This is the first page you see when you’ve clicked the AI Assistant section. This will show all of the AI assistants that you have built on your account.



To create a new assistant, click the + **Create Assistant** button in the top right.



Click Configure to access more information and options for a particular assistant. There are three pages for each assistant, which are outlined below.

Assistant Details

This section provides you with details on the AI assistant's performance, as well as a range of settings to configure.

- The first section has **Business Name** and **Assistant Name** fields that can be edited to personalise your assistant. Type the **Business Name** and **Assistant Name** you want in the respective text box, then click the **edit button** (the paper and pencil icon) to save the change.
- Next to this is the **First Message** section, which allows you to customise the initial greeting message used to welcome callers. Click the edit icon to add and save your new welcome message.

← Back

Concierge active

Delete

Talk to Assistant

Assistant Details

Knowledge Base

Embed Code

Assistant Details

Edit business name and assistant name.

Business Name

Training Co

Assistant Name

Concierge

First Message

Set the initial greeting message for your assistant.

Hello! Welcome to Training Co. How can I assist you today?

Performance

Call statistics and success metrics for this assistant.

4

Total Calls

4

Successful

100%

Success Rate

Phone

Primary phone number for incoming calls to this assistant.

Not assigned

Assign

Fallback

When the AI assistant can't handle a call, it will be forwarded to this number.

Not set

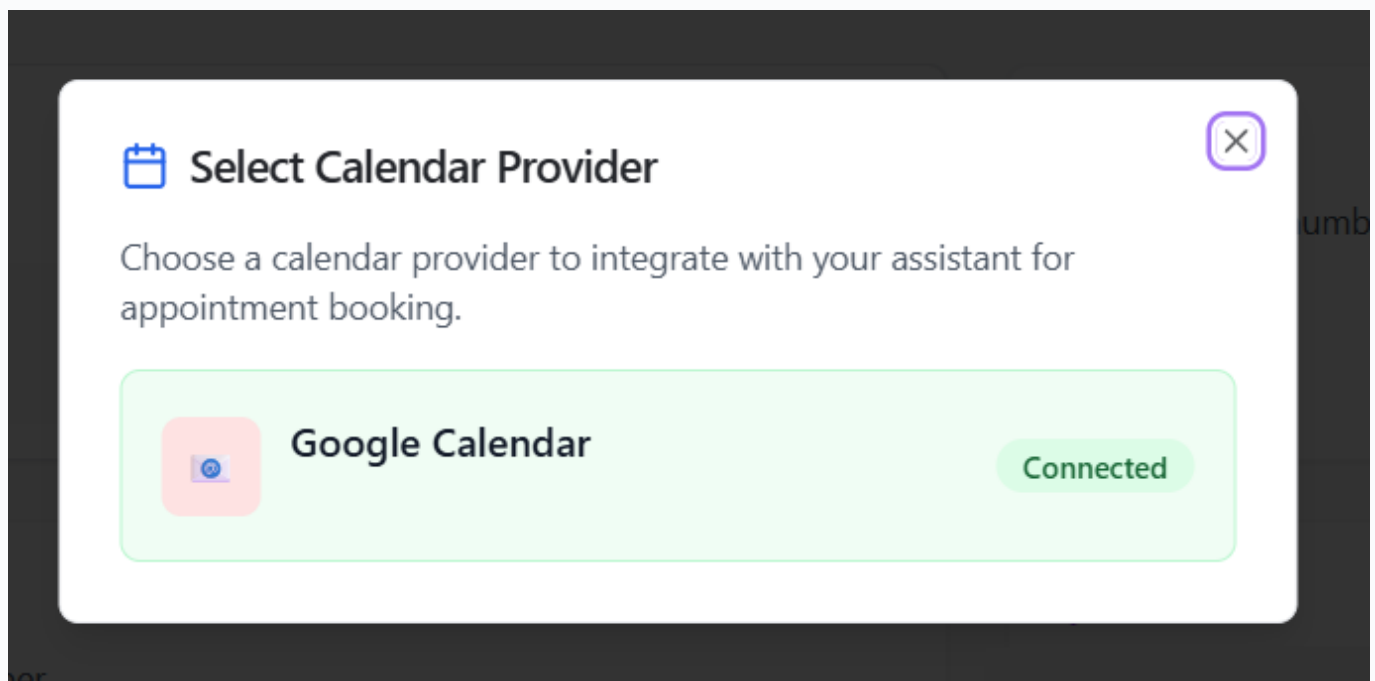
Postcode

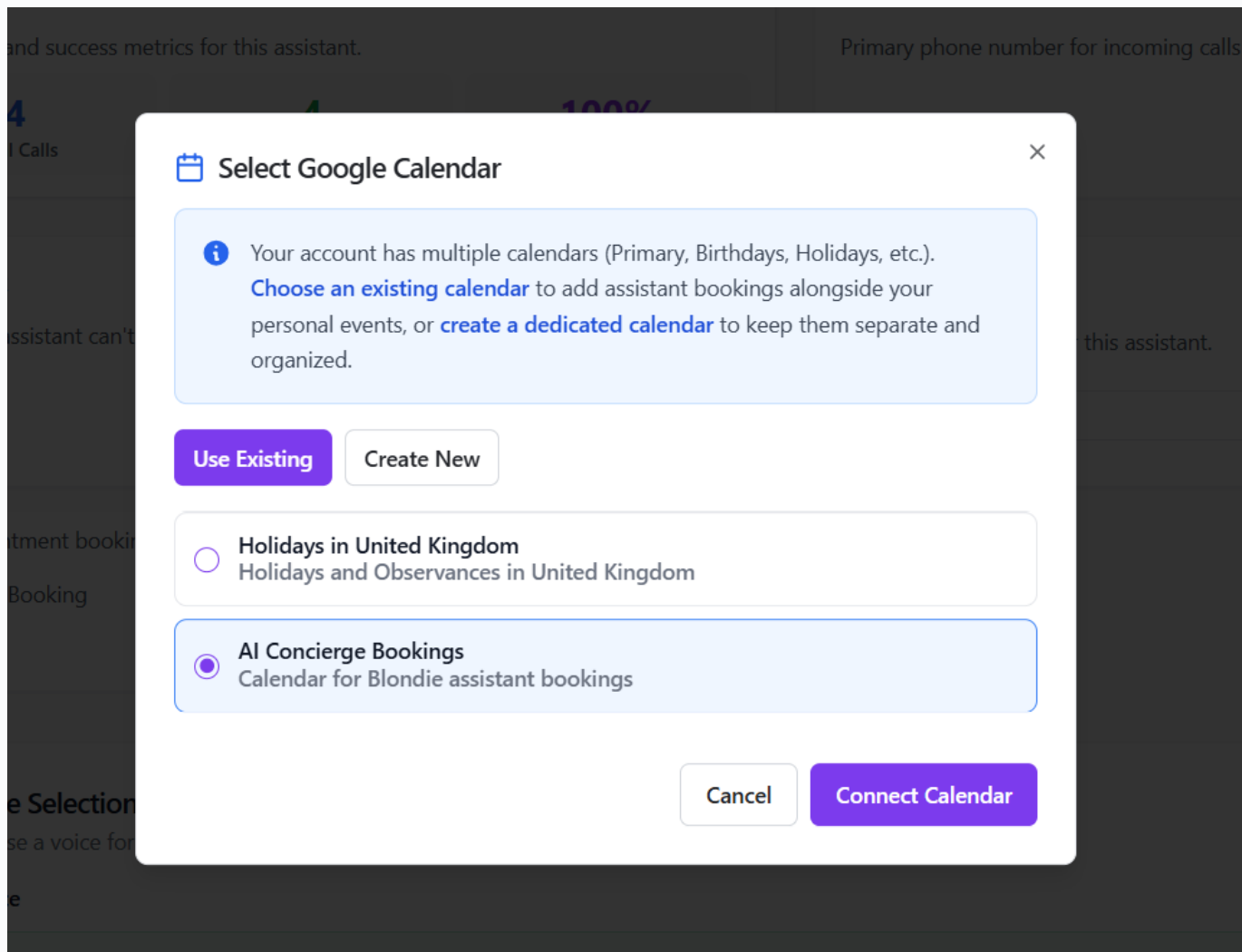
Update the postcode for this assistant.

- The percentage of successful calls with this specific assistant can be tracked within the **Performance** section.
- Click **Assign** to create and attach a new number to the AI assistant. You can then point the customer's public number to the AI assistant so that they answer all incoming calls or utilise an IVR to specify the calls it will handle. This could be calls for a particular department or team, for example.
- If you want the assistant to be able to route calls it cannot handle to an alternative number, the use the **Fallback** section. Press the **edit icon** to add a number.

Please note: The fallback number will be used should the customer reach their monthly minutes cap (including their percentage amount, if enabled). To ensure business continuity this must be filled in with a relevant number.

- You can link the postcode for the business' address to the AI assistant via the **Postcode** section.
- The **Calendar** toggle allows you to enable calendar integration and configure these settings. First you will choose the specific calendar service, then the specific preexisting calendar in that service. Alternatively, you can create a new calendar to use exclusively for bookings via your AI assistant.





- The final section of this page allows you to choose the voice for your AI assistant.

Knowledge Base

The **Knowledge Base** section will show the results of the initial data scrape and compile the discovered information into categories.

- You can view each category and edit the information within as needed. Click **View** on the information you wish to change, then **Edit**, then save your changes.
- You can also scrape additional URL here, though please note they must be from the same domain as the original site.
- Finally, you can upload text and PDF files to the Knowledge Base, which will be scanned for further information and used when answering calls.

Concierge active

← Back Delete Talk to Assistant

⚙ Assistant Details **Knowledge Base** <> Embed Code

Knowledge Base 8 files <https://www.gamma.co.uk> Scrape Upload

Text and PDF Files Accepted
You can upload .txt and .pdf files to the knowledge base.

Document Type	ID	Description	Chars	Action
Contact Information	ID: 1b2751f2-2dc2-4896-9fb5-d8d9674f7fa7	Gamma Communications can be contacted through various channels. They have a dedicated sales contact ...	1882	View
Business Overview	ID: a783fd50-8d68-4751-bdfe-f2d453a4672d	Gamma Communications is a leading provider of unified communications services, offering a comprehens...	3722	View
Company Overview	ID: a544133a-8f63-44da-a903-7b5477457ee6	Gamma Communications has established itself as a prominent player in the communications industry, wL...	2851	View
Policies	ID: 499a17f8-befc-4800-a1d7-d9a1dcfe4d7f	The content does not provide specific details about Gamma Communications' policies. However, we full...	309	View
Services & Products	ID: a6f70928-7970-4396-bf76-2895785ed3c0	Gamma Communications offers a wide array of services and products designed to meet the diverse commu...	3630	View
Pricing	ID: 1ee99873-49b5-446c-a930-5a015c853945	The content does not provide specific pricing information for Gamma Communications' services and pro...	1288	View
FAQ	ID: 33a5e5ad-c493-4e9c-aac9-5a15e4c18006	The content does not include a dedicated FAQ section. However, potential questions that businesses m...	1055	View
Summary	ID: b2520589-a873-425c-85bb-8ed3bafddfc2	Gamma Communications stands out as a leading provider of unified communications solutions, offering ...	2960	View

Embed Code

You may wish to include the AI assistant as part of your website. You can do this by embedding the

code displayed on this page.

- Click **Copy Code** to obtain the embed script, then add the code to your site's body section of the HTML page.
- You may also need to add the permissions policy for audio and microphone use in the HTML header section.
- It is important to note that the AI assistant will only work on secure websites (those that use HTTPS standard).

```
File    Edit    View

<head>
<meta http-equiv="Permissions-Policy" content="microphone=*, camera=*, autoplay=*">
</head>
<body>
<!-- Voice Assistant Widget - Secure Embed -->
<script src="https://voice-builder.zupees.app/widget-production.js?v=1764068055445"
        data-tenant-id="7df9c77d-8e15-4e54-8ac4-f70d8a3cc319"
        data-assistant-id="bd4fd721-16ad-4aec-9e81-5a2b9e90038b"
        data-api-base="https://voice-builder-backend.zupees.app"></script>
<h1>Hello this is my website.</h1><br>
<h2>Please click the phone icon to talk to our AI assistant.</h2>
</body>
```

Ln 1, Col 1 | 553 characters | Plain text

This example is using a text document in place of an actual website. By saving this as a .html file it can be opened in your web browser for quick testing.

This is a test website.

Please click the phone icon to talk to our AI assistant.



Opening the above 'site' in a web browser shows the active AI assistant, which can be clicked and called as expected.