

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.

The screenshot displays the 'Voice Assistants' dashboard. At the top left, the title 'Voice Assistants' is followed by the subtitle 'Manage and configure your AI voice assistants'. On the top right, it shows 'Total Assistants: 2' and a '+ Create Assistant' button. Below this, two assistant cards are visible. The first card, 'Concierge', is active and associated with 'Training Co' and 'Google' for its calendar. The second card, 'Lucy', is also active but shows 'Not Connected' for its calendar. Both cards include a 'Fallback - Call forwarding' section and a 'Configure' button.

Assistant Name	Status	Business Name	Calendar	Primary Number	Total Calls
Concierge	active	Training Co	Google	Not Assigned	4
Lucy	active	Business Name	Not Connected	Not Assigned	0

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

+ Create Assistant

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

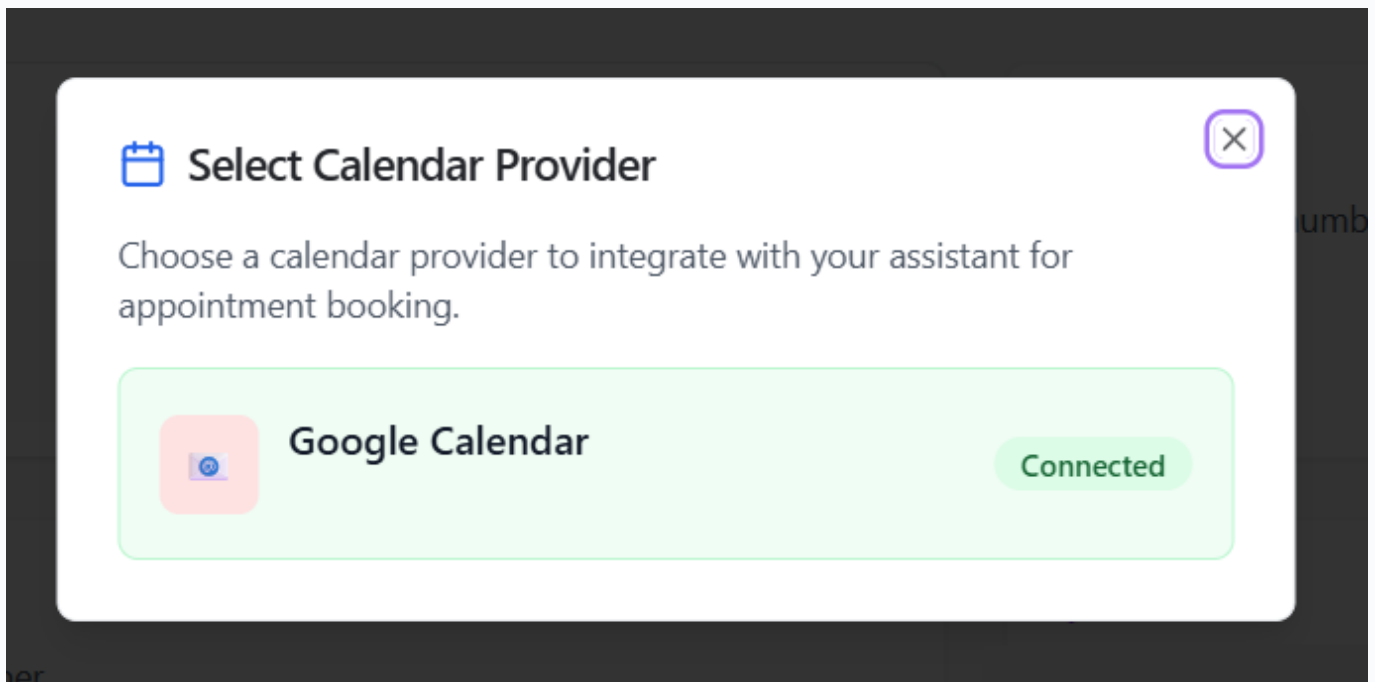
Fallback
When the AI assistant can't handle a call, it will be forwarded to this number.
Not set ✎

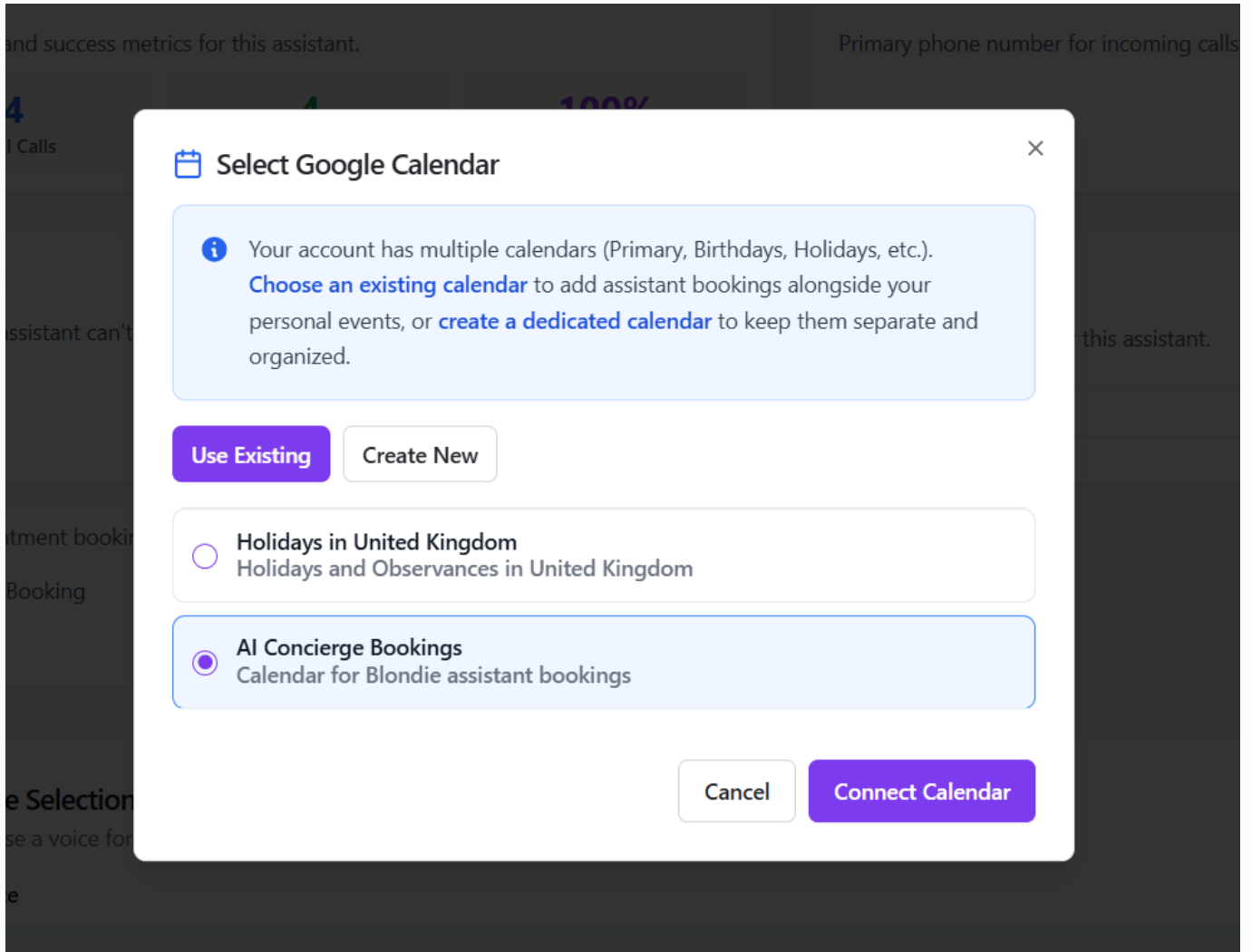
Postcode ✎
Update the postcode for this assistant.

- 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.

The screenshot shows the Concierge Knowledge Base interface. At the top, there's a navigation bar with 'Concierge active', a search bar, and buttons for 'Delete' and 'Talk to Assistant'. Below this is a secondary navigation bar with 'Assistant Details', 'Knowledge Base' (selected), and 'Embed Code'. The main content area is titled 'Knowledge Base' and shows a list of documents. A blue banner at the top of the document list states 'Text and PDF Files Accepted' and 'You can upload .txt and .pdf files to the knowledge base.' Below this, there are seven document cards, each with a title, ID, a brief description, and a 'View' button. The cards are: Contact Information (1882 chars), Business Overview (3722 chars), Company Overview (2851 chars), Policies (309 chars), Services & Products (3630 chars), Pricing (1288 chars), and FAQ (1055 chars).

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.