



# Xrero AI Chatbot

## Website AI Assistant — User Manual



For website owners, support & sales teams

United Arab Emirates edition

Version 2.0 · May 2026 · Complete illustrated guide

# Table of Contents

1. Introduction & how it works
2. Getting Started & the menu
3. The Dashboard
4. The 4-step setup journey
5. Step 1 — AI Credentials & providers
6. AI Models
7. Step 2 — the Chatbot & its AI persona
8. Widget appearance
9. Pre-chat form & lead capture
10. Step 3 — Knowledge Base (documents)
11. Knowledge from your product catalogue
12. Image understanding (vision)
13. Step 4 — embed the widget
14. The chat experience
15. Product recommendations
16. Capturing a lead live
17. Human takeover
18. Conversations (Sessions)
19. Chats on Contacts & Leads
20. WhatsApp connector (advanced)
21. Security & access
22. Tips & best practices
23. Under the hood — how answers are retrieved
24. Answering in Arabic & other languages
25. Glossary
26. FAQ & troubleshooting

Every screen in this manual reproduces the live Xrero AI Chatbot module. All names and content shown are demonstration data.

# 1. Introduction & how it works

**Xrero AI Chatbot** puts an AI assistant on your website — a chat bubble visitors click to ask questions and get instant, human-like answers. You bring your own AI provider (OpenAI, Google Gemini, OpenRouter, or a local model), give the bot a personality, optionally **train it on your own documents and product catalogue**, and paste a small script onto your site. The bot then answers questions, recommends products, captures leads, and hands over to a human when needed — every conversation logged for follow-up.



Figure 1.1 — A visitor's question is answered by the AI using your knowledge, with product tips, lead capture and human hand-off.

This manual is for the **website owner** who sets the bot up and the **support / sales team** who watch conversations and take over chats. Setup is four short steps — add an **AI credential**, create a **chatbot**, (optionally) add a **knowledge base**, and paste the **widget** — each fully illustrated below.

## Good to know

You bring your own provider key, so you control the AI and the cost. Every conversation is stored in **your** Xrero database — nothing leaves your control.

# 2. Getting Started & the menu

Sign in to Xrero and open **AI Chatbot** from the apps menu. The top menu organises the whole module.

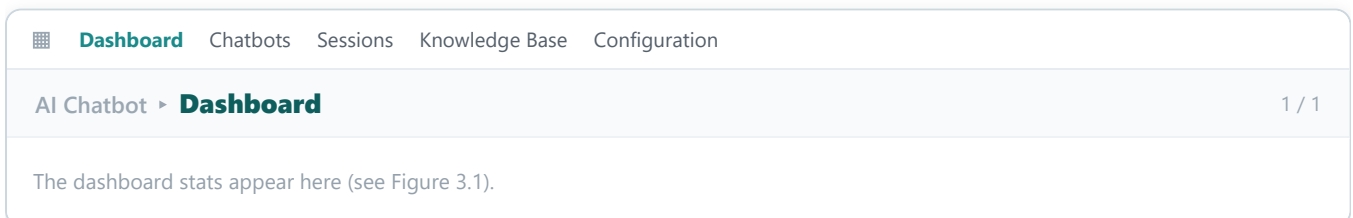


Figure 2.1 — The AI Chatbot menu.

Menu	What you'll find there
Dashboard	Headline stats — sessions, active bots, knowledge docs, leads.
Chatbots	Your assistant(s) and all their settings (the four tabs).
Sessions	Every conversation, with its full message history.
Knowledge Base	The documents and product data the bot is trained on.
Configuration	AI Credentials, AI Models and WhatsApp Connectors.

## 3. The Dashboard

Menu path: AI Chatbot ▶ Dashboard

The dashboard gives the headline numbers and your most recent conversations at a glance. The four cards are clickable, the chart shows the last week's activity, and the recent-sessions list opens any conversation.

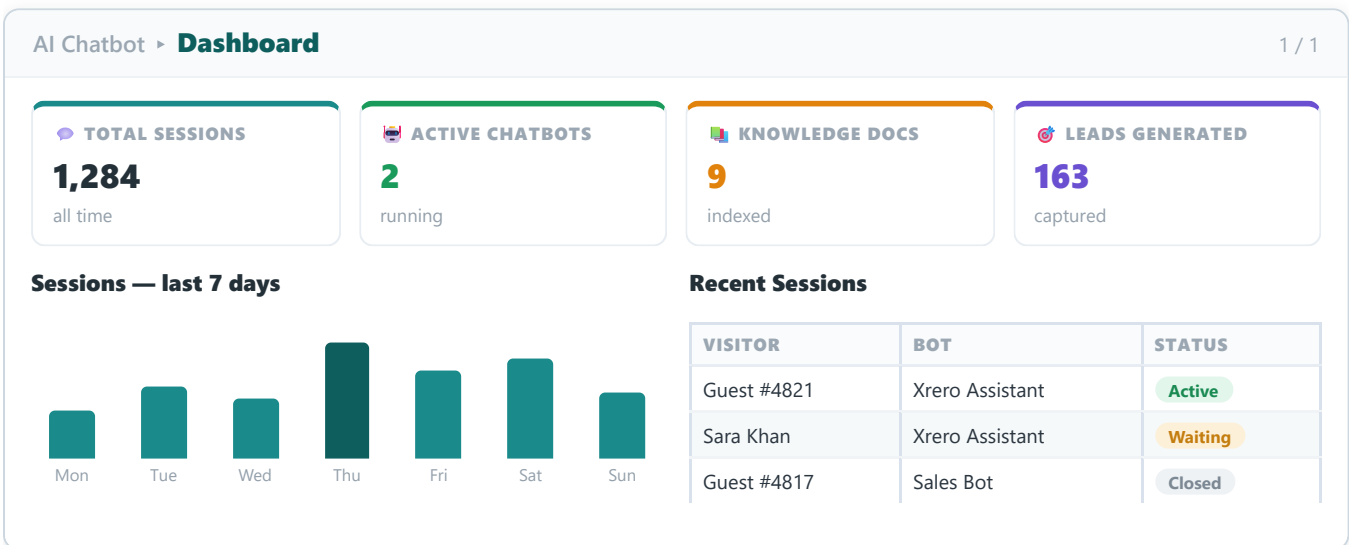


Figure 3.1 — The dashboard: key counters, a 7-day session trend and recent conversations.

## 4. The 4-step setup journey

Getting a bot live is four short steps. The rest of this manual walks through each in detail.

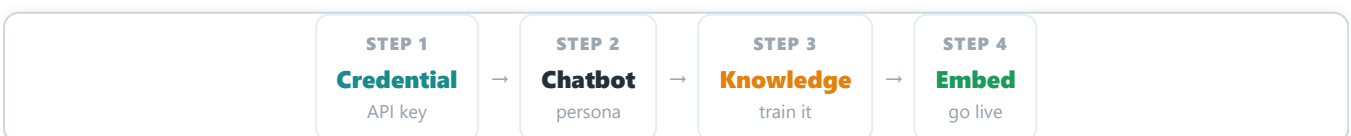


Figure 4.1 — Credential → Chatbot → Knowledge → Embed.

# 5. Step 1 — AI Credentials & providers

Menu path: AI Chatbot ▶ Configuration ▶ AI Credentials

A **credential** holds your AI provider and its API key — the bot's "brain". Xrero supports several providers, so you can choose on price, quality or data-residency.

Provider	Notes
OpenAI	GPT models; paste your API key.
Google Gemini	Gemini models; paste your key.
OpenRouter	One key, access to many models.
Ollama (Local)	A model running on your own server — no key, just a base URL.
OpenAI-Compatible	Any endpoint that speaks the OpenAI API (set a base URL).

- 1 Click `New`, set a **Name**, choose the **Provider**.
- 2 Paste the **API Key** (or, for Ollama/custom, set the **API Base URL**).
- 3 Optionally set the **Embedding Model** (used for the knowledge base).
- 4 Click `Test Connection`, then `Fetch Models` to load the available models.

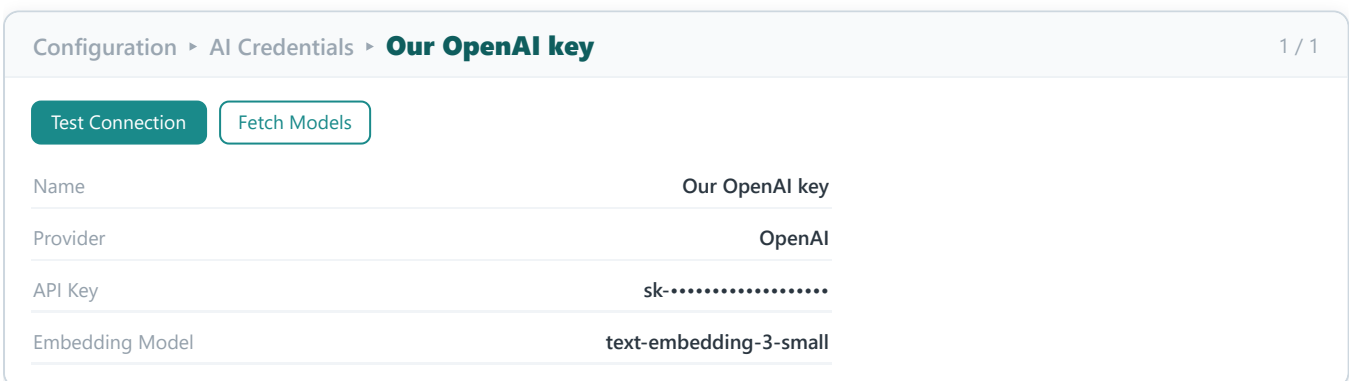


Figure 5.1 — An AI Credential: provider, key, then Test Connection and Fetch Models.

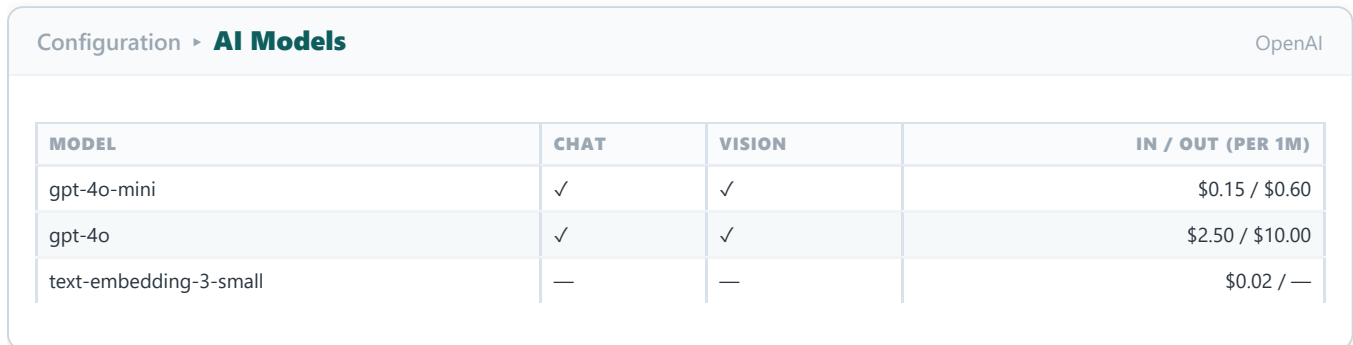
## Keep keys safe

The API key is sensitive and visible to anyone who can open this app — restrict who has access to the AI Chatbot app (Chapter 21).

## 6. AI Models

Menu path: AI Chatbot ▶ Configuration ▶ AI Models

This is the catalogue of models your credentials make available (filled by `Fetch Models`). Each model shows whether it's a **chat** model, whether it's **vision-capable** (can read images), and its input/output cost per million tokens — so you can balance quality against price.



Configuration ▶ **AI Models** OpenAI

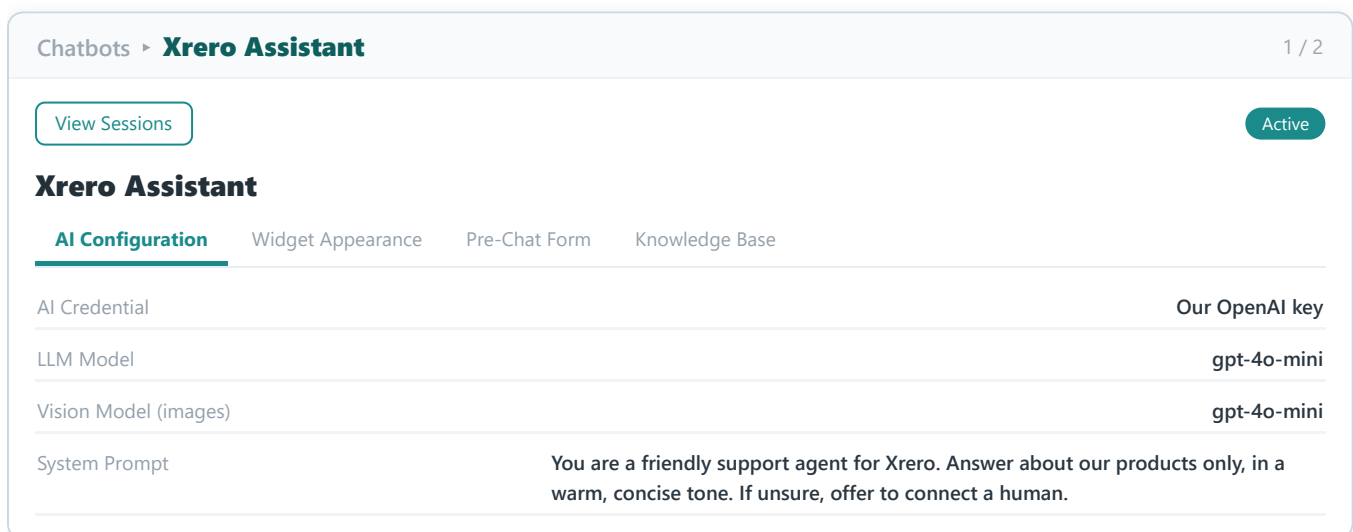
MODEL	CHAT	VISION	IN / OUT (PER 1M)
gpt-4o-mini	✓	✓	\$0.15 / \$0.60
gpt-4o	✓	✓	\$2.50 / \$10.00
text-embedding-3-small	—	—	\$0.02 / —

Figure 6.1 — The models catalogue with chat/vision flags and token costs.

## 7. Step 2 — the Chatbot & its AI persona

Menu path: AI Chatbot ▶ Chatbots ▶ New

The chatbot record ties everything together; it has four tabs (this and the next two chapters). On the **AI Configuration** tab, pick the **AI Credential** and the **LLM Model** (filtered to that provider), and write the **System Prompt** — the bot's personality and rules.



Chatbots ▶ **Xrero Assistant** 1 / 2

[View Sessions](#) Active

### Xrero Assistant

**AI Configuration** | Widget Appearance | Pre-Chat Form | Knowledge Base

---

AI Credential Our OpenAI key

---

LLM Model gpt-4o-mini

---

Vision Model (images) gpt-4o-mini

---

System Prompt You are a friendly support agent for Xrero. Answer about our products only, in a warm, concise tone. If unsure, offer to connect a human.

Figure 7.1 — The AI Configuration tab: credential, model, vision model and the system prompt.

### Tip — a good system prompt

Tell the bot **who it is**, **what it may talk about**, the **tone**, and **what to do when unsure** (e.g. "offer a human"). A clear prompt is the single biggest lever on answer quality.

## 8. Widget appearance

The **Widget Appearance** tab controls how the chat bubble looks to visitors — and gives you the script to install it.

Field	Sets
Widget Title / Subtitle	The header text ("Chat with us" / "Typically replies in minutes").
Widget Color	The bubble & header colour (match your brand).
Welcome Message	The first message a visitor sees.
Avatar / Branding	An optional avatar image and "Powered by" text.
Installation Script	The read-only snippet you paste onto your site (Step 4).

Xrero Assistant > **Widget Appearance** 2 / 4

Widget Title	Chat with us
Widget Color	<span style="color: #1A8A8A;">■</span> #1A8A8A
Welcome Message	Hello! How can I help you today?
Installation Script	<code>&lt;script src=".../widget.js"&gt;...&lt;/script&gt;</code>

Figure 8.1 — The Widget Appearance tab, including the installation script to copy.

## 9. Pre-chat form & lead capture

On the **Pre-Chat Form** tab, turn on **Enable Lead Generation** to ask visitors for their details before chatting. Choose the **Target Model** (a Contact or a CRM Lead), the **Fields to Collect** (name, email, phone...), and whether to **link or create** the record. Captured details flow into your Contacts / CRM automatically.

Xrero Assistant ▸ **Pre-Chat Form** 3 / 4

Enable Lead Generation	✓ On
Target Model	CRM Lead
Fields to Collect	Name, Email, Phone
Mode	Link existing or create new

Figure 9.1 — The Pre-Chat Form tab: collect visitor details into a Lead or Contact.

## 10. Step 3 — Knowledge Base (documents)

Menu path: AI Chatbot ▸ Knowledge Base ▸ New

The knowledge base is what makes the bot answer about **your** business, not just general knowledge. Upload documents and the bot reads, chunks and indexes them, then answers from them.

- 1 Click New, set a **Document Name** and the **Embedding Credential**, and link the **Chatbots** that should use it.
- 2 Choose a **File Type** — **Text, PDF, Word, Excel** or **Markdown** — and upload the file.
- 3 Set **Chunk Size / Overlap** (defaults are fine), then click Process Document.
- 4 When **Indexing Status** reads **Done**, the bot can answer from this source.

Knowledge Base ▸ **Delivery & Returns Policy.pdf** Done

Process Document
Idle
Done

File Type	PDF Document (.pdf)
Embedding Credential	Our OpenAI key
Chunk Size / Overlap	1000 / 200
Indexing Status	Done · 42 chunks

Figure 10.1 — A PDF policy document, processed and indexed for the bot.

## 11. Knowledge from your product catalogue

Choose file type **Product Catalog** to teach the bot your products. Optionally limit by category, then click Sync Products — it indexes each product's name, price, stock, category and description, so the bot can answer "do you have...?" and "how much is...?" accurately.

Knowledge Base > **Product Catalogue** Done

**Sync Products** **Index Images**

File Type	Product Catalog
Product Categories	All
Indexing Status	Done · 312 products
Last Sync	2026-05-22 10:14

Figure 11.1 — Syncing the product catalogue so the bot knows your stock and prices.

## 12. Image understanding (vision)

If your model is **vision-capable**, the bot can **describe product images** automatically (handy when products lack written descriptions) and understand pictures a visitor sends. Set a vision model and prompt, then click **Index All Images** to generate AI image descriptions across the catalogue (runs in the background).

**Image indexing**

Vision Model	gpt-4o-mini
Progress	Running · 240 / 312

77%

Figure 12.1 — AI generating descriptions of product images in the background.

## 13. Step 4 — embed the widget

On the chatbot's **Widget Appearance** tab, copy the read-only **Installation Script** and paste it into your website's HTML, just before the closing `</body>` tag. The chat bubble then appears on every page where the script loads — on your Xrero website **and** external sites (WordPress, a landing page, etc.).

**Installation Script**

```
<script src="https://xrero.com/ai_chatbot/widget.js"></script>
<script>initXreroAIChatbot({chatbotId: 3, baseUrl: "https://xrero.com"});
</script>
```

Figure 13.1 — The installation snippet: paste it once before `</body>` and you're live.

## 14. The chat experience

Visitors see a floating **chat bubble**. Clicking it opens a window with your bot's avatar, title and the welcome message. They type a question and get an answer in seconds, grounded in your knowledge base.

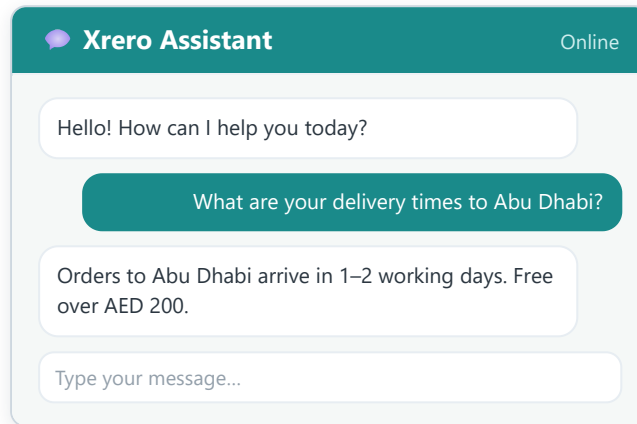


Figure 14.1 — The website chat widget answering from the knowledge base.

## 15. Product recommendations

When the bot suggests products, it renders them as **clickable product cards** — image, name, price, stock — linking straight to the shop page. Great for turning a question into a sale.

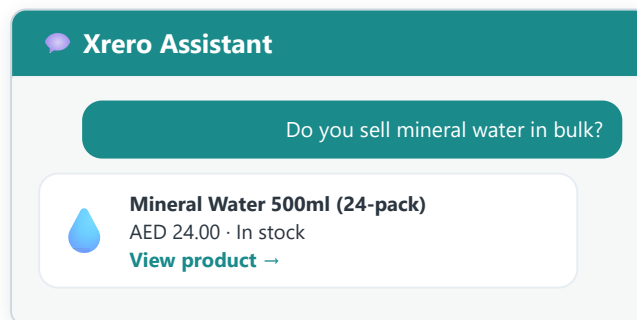


Figure 15.1 — A product card the bot shows in answer to a product question.

## 16. Capturing a lead live

If lead generation is on, the widget shows a short **pre-chat form** first. The visitor enters their details and they're saved as a Contact or CRM Lead, linked to the conversation — so your sales team can follow up even if the chat ends.

The image shows a pre-chat form with a teal header containing a speech bubble icon and the text "Before we start...". Below the header are three white input fields with light gray borders, labeled "Name", "Email", and "Phone". At the bottom of the form is a teal button with white text that says "Start chat".

Figure 16.1 — The pre-chat form captures a lead before the conversation begins.

## 17. Human takeover

When a visitor asks for a person — or the bot decides to escalate — the session is flagged **Waiting for Human**. An agent can then **Join** the chat from the backend; the AI stops replying and the visitor talks to your agent live. The visitor's status dot shows it: green "Online", amber "Waiting for agent", blue "Agent connected".

The image shows a chat interface with a teal header. On the left is a speech bubble icon and the text "Xrero Assistant". On the right is a status indicator: a teal dot followed by "Agent connected". Below the header is a teal message bubble with white text: "Can someone call me about a bulk order?". Underneath is a gray notification bar with white text: "— Layla from Sales joined the chat —". At the bottom is a light blue message bubble with white text: "Hi, this is Layla 🙌 I can help with bulk pricing — what quantity do you need?".

Figure 17.1 — After an agent clicks Join, the AI steps aside and the visitor chats with a person.

## 18. Conversations (Sessions)

Menu path: AI Chatbot ▶ Sessions

Every conversation is stored as a **session** with all its messages. Open one to read the full transcript and act on it. A session moves through **Active** → **Waiting for Human** → **Joined by Human** → **Closed**, and the buttons let you jump in or follow up.

Sessions ▸ **Guest #4821** Active

Join Chat
Create Lead
Create Contact
Close Chat
Active
Waiting
Joined
Closed

**Messages**

ROLE	MESSAGE
User	Do you have mineral water in bulk?
Assistant	Yes! Mineral Water 500ml (24-pack), AED 24...
User	Can someone call me?

Figure 18.1 — A session: transcript, status flow, and buttons to join, close or convert to a lead/contact.

Button	What it does
Join Chat	Take over from the AI and reply live.
Send Reply	Send your message to the visitor (when joined).
Create Lead / Contact	Turn the visitor into a CRM lead or a contact.
Close / Reopen Chat	End or re-activate the conversation.

## 19. Chats on Contacts & Leads

Wherever a conversation is linked to a person, an **AI Chats** smart button appears on their **Contact** and **CRM Lead** records, so your sales team can read what a prospect asked the bot before they call — full context, no guesswork.

Contacts ▸ **Sara Khan** 1 / 1

AI Chats 3
Meetings
Sales

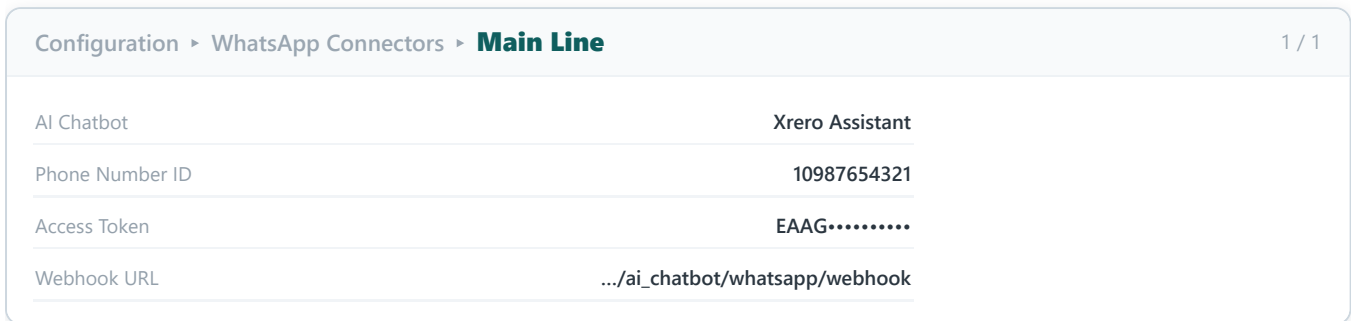
Name	Sara Khan
Email	sara.khan@example.ae
Phone	+971 50 123 4567

Figure 19.1 — The "AI Chats" smart button on a contact opens every conversation that person had with the bot.

## 20. WhatsApp connector (advanced)

Menu path: AI Chatbot ▸ Configuration ▸ WhatsApp Connectors

As an advanced option, the bot can answer on **WhatsApp** via the Meta WhatsApp Business (Graph) API. A connector stores the **Phone Number ID**, **Access Token** and a **Verify Token**, and gives you a **Webhook URL** to register in your Meta app. This needs a configured Meta Business account — set it up with your administrator.



The screenshot shows a configuration page for a WhatsApp connector. The breadcrumb navigation is 'Configuration > WhatsApp Connectors > Main Line'. The page number is '1 / 1'. The configuration details are as follows:

Field	Value
AI Chatbot	Xrero Assistant
Phone Number ID	10987654321
Access Token	EAAG.....
Webhook URL	.../ai_chatbot/whatsapp/webhook

Figure 20.1 — A WhatsApp connector (optional advanced integration).

### Note

WhatsApp is optional and requires Meta setup. The core product is the website chat widget covered above.

## 21. Security & access

Any internal Xrero user who can open the AI Chatbot app can see and manage chatbots, **credentials (including API keys)**, sessions and knowledge bases. Because the keys are sensitive, **restrict who can open the app** to trusted staff. The website widget itself is public — visitors need no login to chat.



The screenshot shows the 'Access Rights' configuration for a user named 'Layla (Sales)'. The breadcrumb navigation is 'Settings > Users > Layla (Sales)'. The configuration details are as follows:

Resource	Access Rights
AI Chatbot	User
Sales	User: Own Documents
Administration	—

Figure 21.1 — Grant the AI Chatbot group only to trusted staff, since credentials are visible inside the app.

## 22. Tips & best practices

- **Write a sharp system prompt** — scope, tone and "offer a human if unsure". It's the biggest quality lever.
- **Feed it real knowledge** — your FAQ, policies and product catalogue. The bot is only as good as what it knows.

- **Re-sync after changes** — update the knowledge base when prices, products or policies change.
- **Watch the sessions** — read real conversations weekly to spot gaps and improve the prompt/knowledge.
- **Pick a cost-effective model** — a small model (e.g. gpt-4o-mini) is fast and cheap for most support chat.
- **Turn on lead capture** — even an unfinished chat becomes a follow-up in CRM.

## 23. Under the hood — how answers are retrieved

When you upload a document, the bot doesn't just "read it each time". It splits the text into small **chunks**, turns each chunk into an **embedding** (a numeric fingerprint of its meaning) and stores them. When a visitor asks a question, the bot embeds the question too, finds the **closest-matching chunks**, and passes only those to the AI model along with your system prompt — so the answer is grounded in **your** content. This technique is called **RAG** (retrieval-augmented generation).

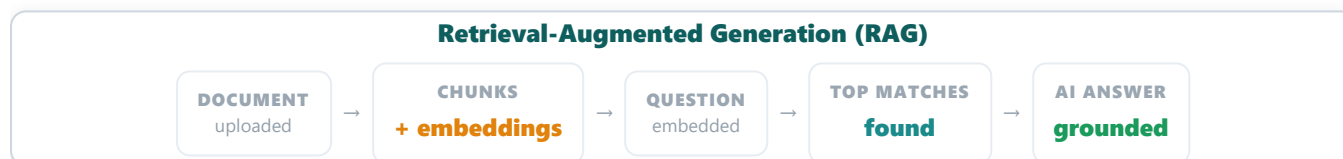


Figure 23.1 — Your documents are chunked and embedded; each question pulls the most relevant chunks into the answer.

### Why this matters

Because only the most relevant chunks are sent, the bot stays accurate and costs stay low — and it can cite information it was never explicitly asked about, as long as it's in your knowledge base.

## 24. Answering in Arabic & other languages

The underlying AI models are **multilingual**, so the bot replies in whatever language the visitor writes in — including **Arabic**. A visitor can ask in Arabic and get an Arabic answer, then switch to English mid-chat. To make this reliable, write your **system prompt** to allow it (for example, "reply in the visitor's language") and, ideally, add your key knowledge documents in both languages.



Figure 24.1 — The same bot answering an Arabic question in Arabic — ideal for UAE audiences.

## 25. Glossary

Term	Meaning
Chatbot	The configured AI assistant (persona, model, knowledge, widget).
AI Credential	Your AI provider and its API key.
LLM Model	The AI model that generates answers.
System Prompt	Instructions that set the bot's personality & rules.
Knowledge Base	Your documents/product data the bot is trained on.
Embedding	How text is indexed for the bot to search (RAG).
Session	One conversation with a visitor.
Lead capture	Collecting visitor details into Contacts / CRM.
Human takeover	An agent joining a chat to reply in person.
Widget	The chat bubble embedded on your website.

## 26. FAQ & troubleshooting

### The bot replies "I can't connect" or errors.

Open the **AI Credential**, click `Test Connection`, check the key is valid and has credit, then `Fetch Models` and re-select the model on the chatbot.

## The bot doesn't know about my products / policies.

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Add a **Knowledge Base** source and index it (Chapters 10–11), and make sure it's linked to the chatbot on its Knowledge Base tab.

## The chat bubble isn't on my website.

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Copy the **Installation Script** from the Widget Appearance tab into your site's HTML before `</body>`, and make sure the chatbot is **active**.

## How do I take over a conversation?

---

Open the session and click `Join Chat`; the AI stops and your replies go to the visitor. Click `Close Chat` when finished.

## How do I capture leads?

---

On the chatbot's **Pre-Chat Form** tab, enable lead generation and choose the target model and fields.

## Answers are slow or expensive.

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Pick a smaller, cheaper model in **AI Models** and keep the knowledge base focused — fewer, better documents beat many noisy ones.

### Need help?

Contact your Xrero administrator or visit [xrero.com](https://xrero.com).