



Xrero AI Chatbot

Website AI Assistant — User Manual

For website owners, support & sales teams

United Arab Emirates edition

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

1. Introduction

Xrero AI Chatbot puts an AI assistant on your website — a chat bubble visitors click to ask questions and get instant, human-like answers. The bot answers using a leading AI model (OpenAI, Google Gemini, OpenRouter or a local model), can be **trained on your own documents and product catalogue**, recommends products, captures leads, and hands over to a human agent when needed. Every conversation is logged so you can review and follow up.

This manual is for the **website owner** who sets the bot up, and the **support / sales team** who monitor 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** onto your site.

Good to know

You bring your own AI provider key. The bot uses that provider's model to generate answers, grounded in the knowledge you give it. No conversation leaves your control — everything is stored in your Xrero database.

2. Getting Started

- 1 Sign in to Xrero and open `AI Chatbot` from the apps menu.
- 2 The top menu has **Dashboard**, **Chatbots**, **Sessions**, **Knowledge Base** and **Configuration**.

Menu	What you'll find there
Dashboard	Headline stats — sessions, active bots, knowledge docs, leads.
Chatbots	Your assistant(s) and all their settings.
Sessions	Every conversation, with its messages.
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 you the headline numbers and your most recent conversations at a glance. The four cards are clickable.

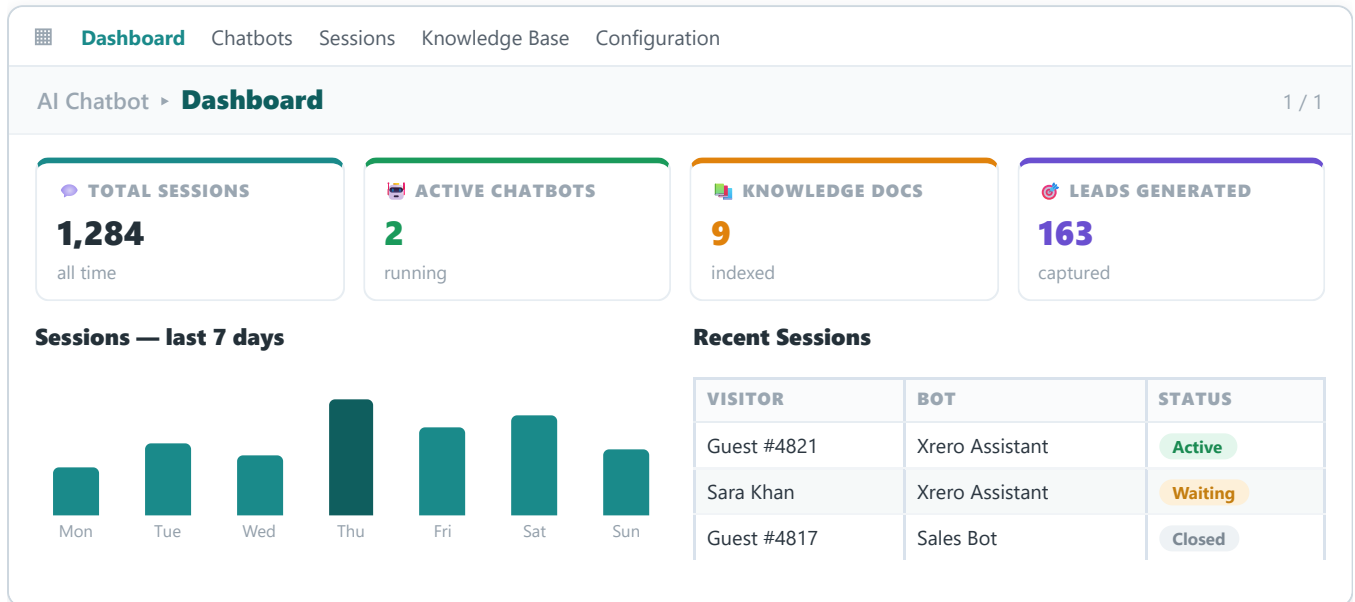


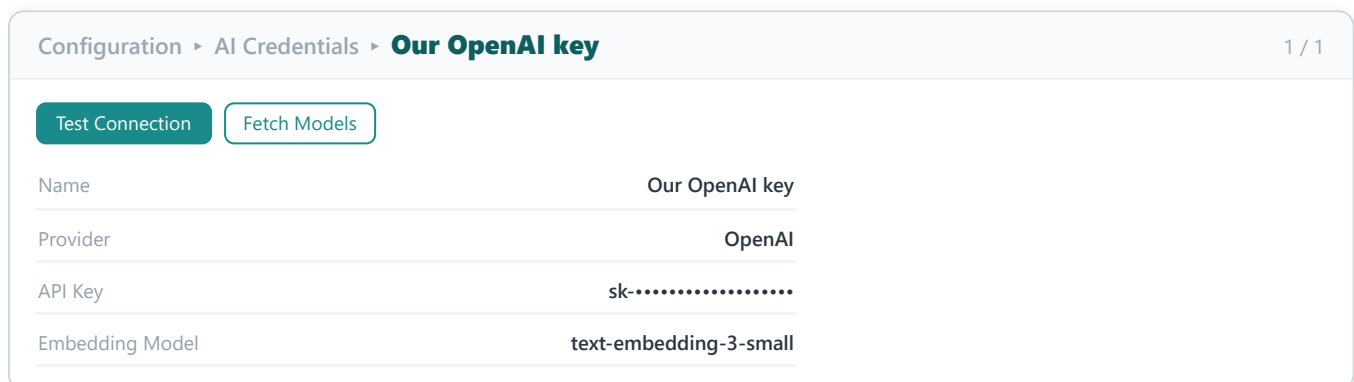
Figure 3.1 — The AI Chatbot dashboard: key counters, a 7-day session trend and recent conversations.

4. Step 1 — Add an AI Credential

Menu path: AI Chatbot ▶ Configuration ▶ AI Credentials

A **credential** holds your AI provider and its API key. This is where the bot's "brain" comes from.

- 1 Click `New`, give it a **Name** (e.g. "Our OpenAI key").
- 2 Choose the **Provider** — OpenAI, OpenRouter, Google Gemini, Ollama (Local) or OpenAI-Compatible.
- 3 Paste your **API Key**. (For Ollama / a custom endpoint, set the **API Base URL** instead.)
- 4 Click `Test Connection` to check it, then `Fetch Models` to load the list of available models.



The screenshot shows the configuration page for an AI credential named "Our OpenAI key". At the top, there are two buttons: "Test Connection" (highlighted in dark teal) and "Fetch Models". Below the buttons, the configuration details are displayed in a table-like format:

Name	Our OpenAI key
Provider	OpenAI
API Key	sk-.....
Embedding Model	text-embedding-3-small

Figure 4.1 — An AI Credential. Test the connection, then fetch the available models.

Keep keys safe

Your API key is sensitive — anyone with access to this app can see credentials. Limit who can open the AI Chatbot app.

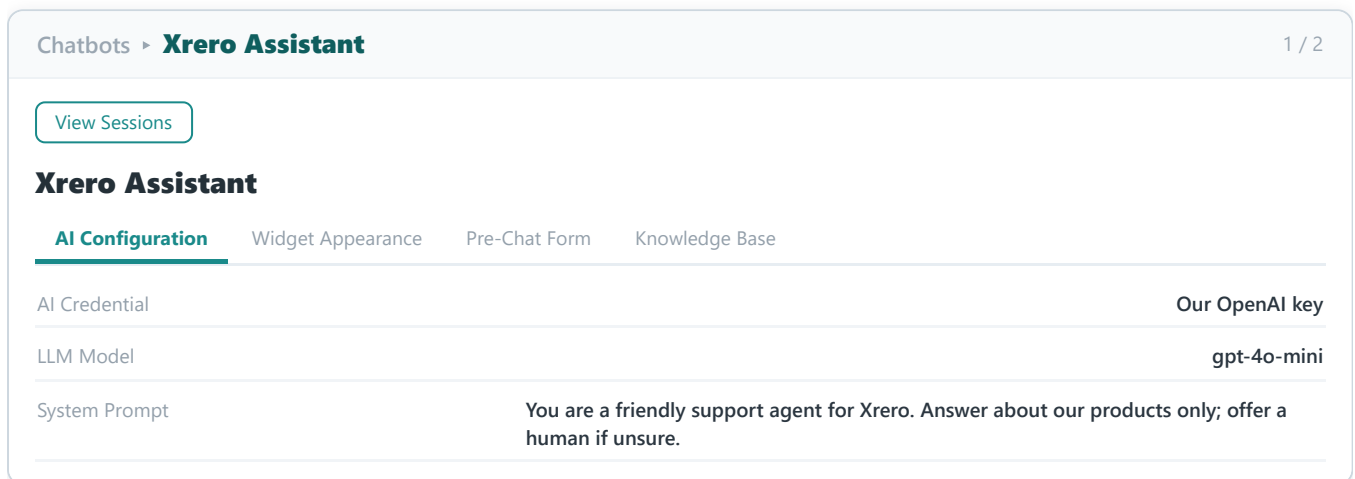
5. Step 2 — Create a Chatbot

Menu path: AI Chatbot ▶ Chatbots ▶ New

The chatbot record ties everything together. It has four tabs.

5.1 AI & persona

On the **AI Configuration** tab, pick the **AI Credential** and the **LLM Model** (the list is filtered to that provider). Then write the **System Prompt** — the bot's personality and rules. For example: "You are a friendly support agent for Xrero. Answer only about our products, in a warm, concise tone. If unsure, offer to connect a human."



The screenshot shows the configuration interface for a chatbot named "Xrero Assistant". At the top, there is a breadcrumb "Chatbots ▶ Xrero Assistant" and a page indicator "1 / 2". Below this is a "View Sessions" button. The main heading is "Xrero Assistant". There are four tabs: "AI Configuration" (which is selected and underlined), "Widget Appearance", "Pre-Chat Form", and "Knowledge Base". The "AI Configuration" tab contains three rows of configuration:

AI Credential	Our OpenAI key
LLM Model	gpt-4o-mini
System Prompt	You are a friendly support agent for Xrero. Answer about our products only; offer a human if unsure.

Figure 5.1 — The chatbot's AI Configuration tab: credential, model and the system prompt (persona).

5.2 Widget appearance

On the **Widget Appearance** tab, set the **Widget Title** ("Chat with us"), **Subtitle**, **Widget Color**, **Welcome Message**, an optional **Avatar**, and the branding text. This tab also shows the read-only **Installation Script** you copy onto your site (Step 4).

5.3 Pre-chat form & leads

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.

5.4 Knowledge

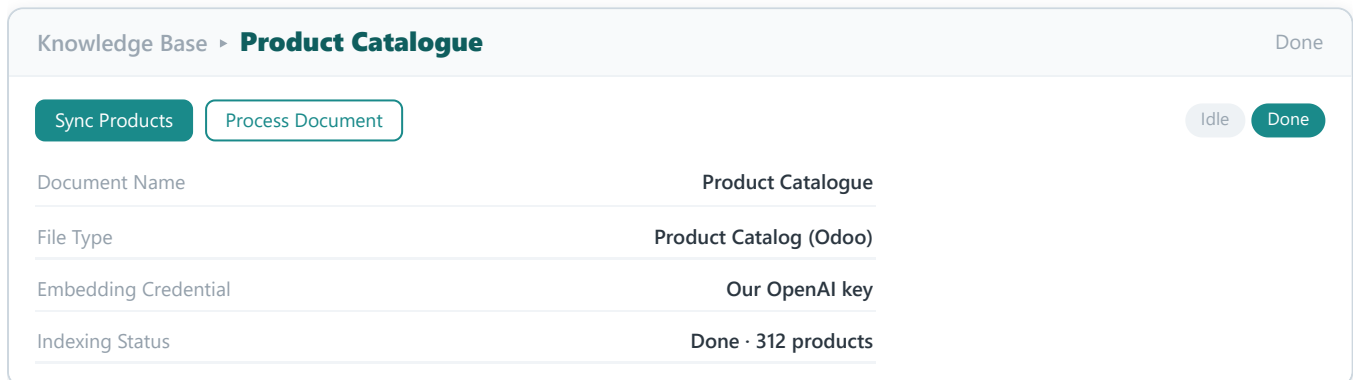
On the **Knowledge Base** tab, attach the documents/product data the bot should learn from (built in Step 3).

6. Step 3 — Build the Knowledge Base

Menu path: AI Chatbot ▶ Knowledge Base ▶ New

The knowledge base is what makes the bot answer about **your** business, not just general knowledge. You can feed it documents or your product catalogue.

- 1 Click **New**, set a **Document Name** and the **Embedding Credential**, and link the **Chatbots** that should use it.
- 2 Choose the **File Type**:
 - **Text / PDF / Word / Excel / Markdown** — upload the file, then click **Process Document** (it reads, chunks and indexes the text).
 - **Product Catalog (Odo)** — optionally limit by category, then click **Sync Products** to index product names, prices, stock and descriptions.
- 3 The **Indexing Status** shows progress; when it reads **Done**, the bot can answer from this source.



The screenshot shows the 'Knowledge Base' interface for a 'Product Catalogue'. At the top right, it says 'Done'. Below the title, there are two buttons: 'Sync Products' (highlighted in teal) and 'Process Document'. On the right side, there are two status buttons: 'Idle' (grey) and 'Done' (teal). Below these are four rows of information:

Document Name	Product Catalogue
File Type	Product Catalog (Odo)
Embedding Credential	Our OpenAI key
Indexing Status	Done · 312 products

Figure 6.1 — A Product Catalogue knowledge source, fully indexed.

Tip

Add an FAQ or policy document (PDF/Word) so the bot can answer common questions — opening hours, delivery, returns — in your own words.

7. Step 4 — Add the Widget to Your Website

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

Note

The widget is a self-contained script, so it works on your Xrero website **and** on external sites (WordPress, a landing page, etc.). Paste once and you're live.

8. 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; the bot can show **product cards** (image, price, link) and, if lead generation is on, ask for their details first.

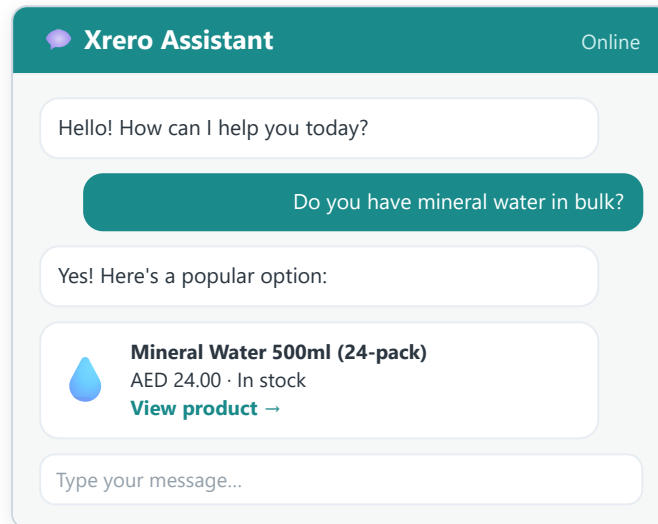


Figure 8.1 — The website chat widget: welcome message, a visitor question, and an answer with a product card.

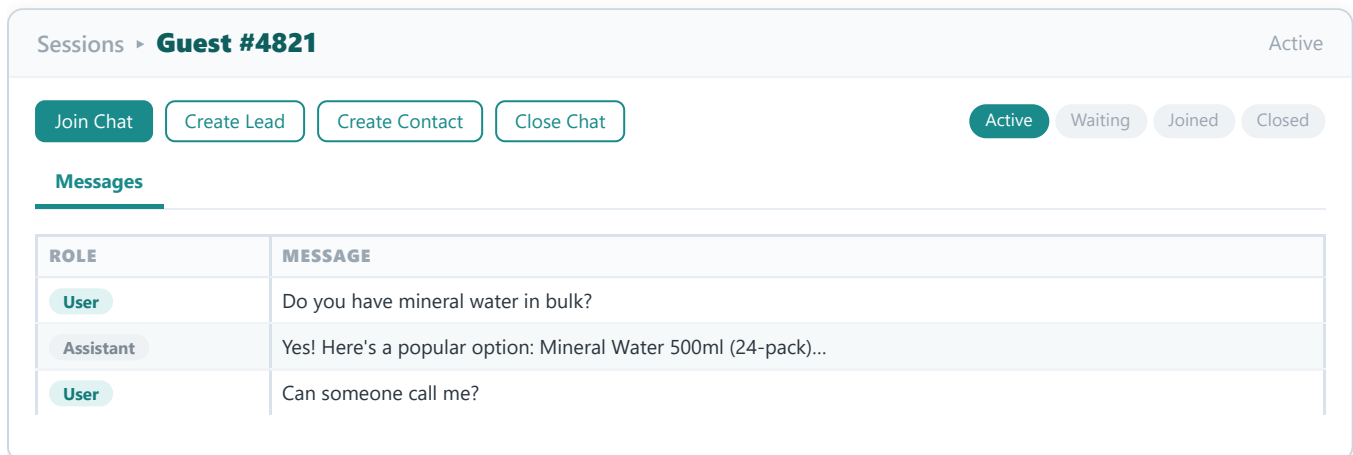
Human takeover

If 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.

9. 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**.



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! Here's a popular option: Mineral Water 500ml (24-pack)...
User	Can someone call me?

Figure 9.1 — A session: the transcript, the status flow, and buttons to join, close or convert it to a lead/contact.

From a session you can [Join Chat](#) to reply live, [Create Lead](#) or [Create Contact](#) to follow up in CRM, and [Close Chat](#) when done. Sessions also appear on the related Contact and Lead via an **AI Chats** button.

10. AI Models

Menu path: AI Chatbot ▶ Configuration ▶ AI Models

This is the catalogue of models available from your credentials (populated by `Fetch Models`). Each shows whether it is a **chat** model, whether it is **vision-capable** (can read images), and its input/output cost per million tokens, so you can pick a model that balances quality and price.

11. WhatsApp (optional)

Menu path: AI Chatbot ▶ Configuration ▶ WhatsApp Connectors

As an advanced option, the bot can answer messages 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 requires a configured Meta Business account; set it up with your administrator.

Note

WhatsApp is optional. The core product is the website chat widget described in this manual.

12. Glossary

Term	Meaning
Chatbot	The configured AI assistant (persona, model, knowledge, widget).
AI Credential	Your AI provider and its API key.
LLM Model	The specific AI model that generates answers.
System Prompt	The instructions that set the bot's personality and rules.
Knowledge Base	Your documents/product data the bot is trained on.
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.

13. FAQ & Troubleshooting

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

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

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

Add a **Knowledge Base** source and index it (Step 3), and make sure it is linked to the chatbot on its Knowledge Base tab.

The chat bubble isn't on my website.

Copy the **Installation Script** from the Widget Appearance tab and paste it into your site's HTML before `</body>`. 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 live; click **Close Chat** when finished.

How do I capture leads?

On the chatbot's **Pre-Chat Form** tab, enable lead generation, pick the target model (Contact or Lead) and the fields to collect.

Need help?

Contact your Xrero administrator or visit xrero.com.