Setup Guideline and App Component Details GentAl Bot - Sales and Service

For Shopify Store Websites

Ver 5.0; Product Release 5.0

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A. Setup Guideline - Step by Step

Step 1: Installation and Sign In

Step 1.1: Install GentAl Bot from the Shopify App Marketplace

Log in to the Shopify store admin account using your username and credentials.

Step 1.2: Install the App for Your Shopify Store

Click on the app, "GentAl Bot - Sales and Service"; Then select the store. Click on Install;

B shopily	Q. Search	en k	4 🧧 interart,al, chata
A Home		Install app	
Gorders		and the second se	
Ø Products		A This app hase'(been reviewed	
L Customers			
Content		Shopify reviews apps to ensure your security is protected. Be sure you trust this app developer before installing.	
di Analytics			
@ Markethey			
O Discounts		GentAl Bot - Sales and Service Aparaperts Das	
Sales channels >		This approveds access to:	
D Premier Sale		View personal data	
Shop		Customers, store owner	
		View store data	
Apps >		Products, orders	
E Fou			
		Court (1993)	1
 Settings Non-transferable 			

It will take you to GentAI's Sign Up page along with oAuth.

Step 1.3: Sign Up, Verify Email and Sign In

First, fill up the sign-up form. The Email field will be frozen in the sign-up form.

ff		
	Sign	Up
	First name U	ast name
	Aparajeeta	Das
	Email	
	aparajeetadas@gmail.com	
	Password	
	Confirm Password	
	I Accept the Terms and	Conditions.
	Sign u	P
	Already have an ac	count? <u>Sign in</u>
	Terms Plans	Contact Us

You will then be taken to the verification screen.

Check your inbox for the registration email. You will receive an email with the subject, "Welcome! Thank you for signing up to AI Chatbot!". In that email, you will get a Verification token and a Client Token.

Copy the Verification token and enter it into your verification page.

in the second seco	Signin
	Verify Your Account
	Please enter the token sent to your email.
	Token Token
	Verify Ernoll
	Terms Plans Contact Us

This will take you to the Sign In page.

in the second seco			Sign Up	
	Start Your	Free Trial!		
	No Credit Ca			
	Email			
	Email			
	Password	Forgot your password?		
	Log			
	Don't have an ac	count? <u>Sign up</u>		
	Terms Plans	Contact Us		

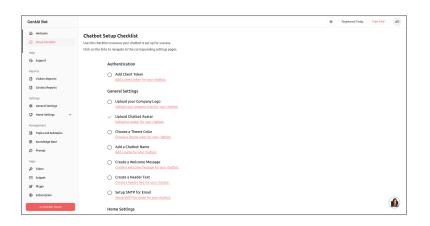
Please Sign In.

Step 2: Chatbot Content Setup and Bot Training

Step 2.1: Perform General Settings using Setup Checklist

Once you have successfully logged in, you will be taken to the admin panel. Click on Setup Checklist and follow the steps for General Settings. Note. General Settings are about populating the Bot with your Company Logo, your color, Welcome Messages, etc.

Follow the Chatbot Setup Checklist and Populate all.



Here is a sample of General Settings Page. Fill up each item.

GentAl Bot		* Registered Today Free Trial AD
Welcome	General Settings	
Setup Checklist	In this page, you can set your Logo, Avatar for the agent, Choose a theme color and more.	
Help	Please simply follow the steps to get these done. You can always come back and update any settings in this page	e.
63 Support	STEP I - Set up Logo	STEP II - Set up Chatbot Avatar
Reports		Chatbot Avatar
Visikors Reports	Company Logo	Chatbot Avatar
Contact Reports		
Settings		
General Settings		
C⊈ Home Settings ∽	Browse No file selected.	Browse No file selected,
Management	Upland	Upland
Topics and Subtopics		
(E Knowledge Base	Go to <u>Setup Checklist</u>	Go to Setup Checklist
D Prompt	STEP III - Set up Theme Color for your Chatbot	STEP IV - Set up Chatbot Name
Apps	STEP III - Sec up Theme Color for your Chatbot	Sharine Second and an and
	Choose a color	Add a Name or a Message
Snippet	Theme Color	Chatbot Name
Plugin Subscription		
(h) Proscubrou	Save	Seve
AI Chatbot Home	Go to Setup Checklist	Go to Setua Checklist

In order for the Chatbot to communicate and retrieve data from the backend, you will need to add the Client Token for authorization.

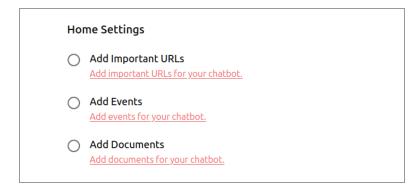
Copy the "Client Token" from your registration email and enter into Apps - > Token (Client Token field) and save.

ientAl Bot		* Registered Today Free Trial A
 Welcome 	Client Token	
3 Setup Checklist		
telp	Client Token	
à Support	Client Token	
reports		
Visitors Reports	Save	
Contact Reports	Go to <u>Setup Checklist</u>	
ettings 8 General Settings		
3 Home Settings	*	
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Topics and Subtopics		
E Knowledge Base		
Prompt		
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Subscription		
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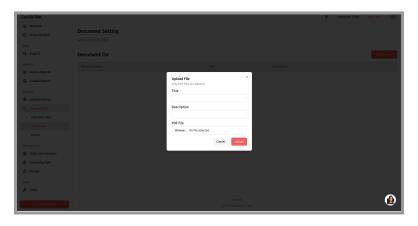
Test your Chatbot on the right hand side bottom corner.

Step 2.2: Perform Home Settings using Setup Checklist

Follow the Home Settings links in the Setup Checklist and visit each setting from the links given.



In the URL Settings Page, Click on the Add URL button which opens this Dialog to Add URL.

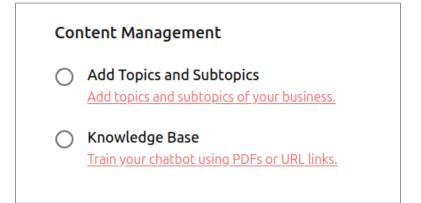


Similarly you can add documents and events from the respective pages. Here is the screen for settings of your upcoming events.

entAl Bot					- Registered Today	Free Trial A
a) Welcome 3) Setup Checklist Irolp	Event Setting Go to Setup Checklist					
) Support	Event list					Add Even
eports) Visitors Reports) Contact Reports	Image Name	un	Title	Description		
ittings 8 General Settings						
Home Settings						
Documents Events						
anagement Topics and Subtopics						
E Knowledge Base Prompt						
ops > Token						
AI Chatbot Home			Contact 2024 DirectMart.Al Inc.			

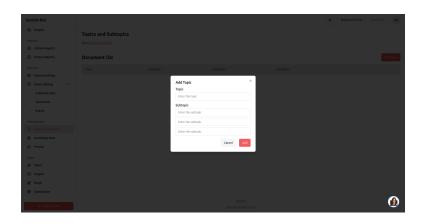
Step 2.3: Train the AI Chatbot using Content Management Setup Checklist

Here is the Content Management settings checklist.



Click each link to train the Bot.

In the Topics and Subtopics page, click on the **Add Topic** button which opens this Dialog to Add Topic and its Subtopics.



In the Knowledge Base page, click on the Menu **FILE** button to toggle between File and URL, click on the **Upload File or Upload URL** button which opens Dialog to upload **File / URL**.

Here is the Knowledge Base Management Page. Remember for each File / URL upload, you need to select each File / URL at a time and Click on Button Action - > Train. You need to do the same for generating Prompts/Questions for each File / URL.

nowledge B	Base								
ile o					Upload File				Actio
Topic	Subtopic	Name	Upload Date (GMT)	Status	Delete Date (GMT)	Trained	Trained Date (GMT)	Extract Prompt	Extract Prompt Date (GMT

Here is the Prompt Setting page. You can check the automated generated prompt/s by selecting your topic and subtopics. Prompts will be generated based on the amount and quality of content you have uploaded in the Knowledge Base and trained with.

GentAl Bot		∰. Registe	red Today Free Trial AD
 Welcome Setup Checklist 	Prompt Setting		
telp	Prompt Setting		
3 Support	Торіс		
ports	Select a Menu :		
Visitors Reports	Subtopic		
Contact Reports	Select a Submenu 0		
ttings			
General Settings			
8 Home Settings 🔷			
Important URLs			
Documents			
- Events			
anagement			
Topics and Subtopics			
Knowledge Base			
Prompt			
pps			
> Token			
		Contact	

Step 3: Test Your AI ChatBot

On the right-hand side bottom area of your page, you will see your chatbot.

Step 3.1: Test the Home tab.

ientAl Bot		송 Registered Today Pree Trial /
6 Support	Prompt Setting	
leports	Prompt Setting	
Visitors Reports	Prompt Setting	
Contact Reports	Topic	
ttings	Select a Menu :	
General Settings	Subtopic	
5 Home Settings	Select a Submenu 0	0
 Important URLs 		20
Documents		
Events		Please contact us. We will reply back.
anagement		
Topics and Subtopics		Leave Your Email
Knowledge Base		1.
) Prompt		
005		
ppo Tokan		
5 Snippet		
P Plagin		
Subscription		Main Chat Ernal
		Powered by Instaliant AJ Inc.

Step 3.2: Test the Chat tab.

GentAl Bot		Negistered Today Free Trial
ⓐ Welcome ⊙ Setup Checklist	Prompt Setting	
Help	Prompt Setting	
G Support	Topic	
teports	Select a Menu 0	
Visitors Reports	Subtopic	
Contact Reports	Select a Submenu 0	Clear History
ttings		Hello
General Settings		How can I help you?
\$ Home Settings ^		
 Important URLs 		Topic A Tapic B
- Documents		
Events		
Aunagement		
Topics and Subtopics		
Knowledge Base		Type your message
D Prompt		
lpps		Main Chat Email
🖉 Token		Powered by InstaMart Al Inc.
	Contact	Get Your Charbot

Step 3.3: Test the Email tab.

SentAl Bot		We Registered Today Free Trial
G Support	Prompt Setting	
Reports		
Visitors Reports	Prompt Setting	
Contact Reports	Topic	
Settings	Select a Menu 0	
Ceneral Settings	Subtopic	
🕼 Home Settings 🔷 🗠	Select a Submenu 0	Send Us an Emi
Important URLs		Send Us an Emi
Documents		Name
Events		John Doe
		Email johndoe@gmail.com
Management		
Topics and Subtopics		Note Will your note
🐇 Knowledge Base		while your nove
Prompt		
Apps		Submit
Ø Taken		SLEMA
Snippet		
g ^o Plugin		â 🖻 🖻
Subscription		Main Chat Email
	Contact	Powered by InstaMart Al Inc. Get Your Chatbot
AI Chatbot Home	2024 DiristaMar	

Step 4: Access Reports on your Visitors' chats and Contacts.

Step 4.1: Click on Visitors menu item to access Visitors' Report

ientAl Bot				· (4)	gistered Today Free Trial Al
Welcome Welcome	Visitors Reports				
3 Setup Checklist					
telp	Download as CSV				
3 Support	Question	Answer		Date and Time 🔅	Cookies
eports					
Visitors Reports					
Contact Reports					
ettings					
B General Settings					
🖇 Home Settings 🔷 🥎					
Important URLs					
Documents					
· Events					
fanagement					
Topics and Subtopics					
🛠 Knowledge Base					
9 Prompt					
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			Contact		(1

Step 4.2: Click on Contacts menu item to access Contacts' Report

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> Tokan	

Step 5: Payment Setup

Step 5.1: Subscription Selection

Please select the available plan and it will take you to the Shopify page for payment approval.

GentAl Bot		🔆 Registered Today Free Trial AC
G Support	Shopify Plans	
Voltan Report Volta	Starting \$\$ 14 Nor Hinay Docensits - 14 Nor Hinay Docensits - 14 Nor Hinay Docensits - 15 North Hinay Docensits - 16 North Hinay Docensits - 17 North Hinay Docensits - 18 Nort Hi	
AI Chatbot Home	Contact	

Step 5.2: Payment Authorization using Shopify Billing

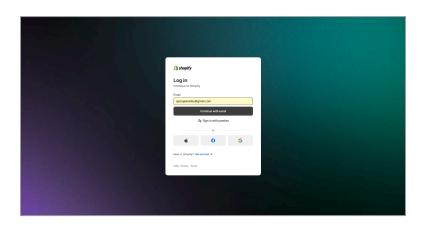
You can approve the payment authorisation.

🖨 shopify	Q. Search	CTR, K
 Home Orders 	Approve subscription	Cancel
Products Customers	A You will not be billed for this set charge.	
 Content Enance Analytics 	CentAl Bot - Sakes and Service by Appropriate Day	Your next bill
Marketing Discounts	Plan. My Shepity App Subscription	You have a 7-stay free trial ending on Sep 5. Subtestal \$5.00 plus any oppricable taxes
Sales channels > Cinine Store Point of Sale	SLODe UGD www.jb daye	Total \$5.00 Due Sep 5
රි Shop Ages > ම Prov	Present central Character age prices and to project that subseque. Character acade concet Acade concet Concet concet Concet concet Concet concet	Аданон
	By proceeding, you are supposed to the <u>"Similar Calences</u> Subject to government to an electric p	orwalling charges.
Ø Settings		
Non-transferable		

Step 6: Deploy the Bot to Shopify Store's Website

Step 6.1: Sign In to Your Store's Admin Page

(i.e.https://admin.shopify.com/store/instamart-ai-chatbot).



Step 6.2: Enable Theme App Extension

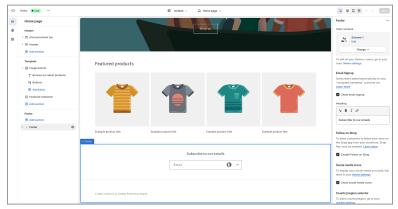
Open Online Store by clicking on "Online Store" menu option on the left-hand side menu.



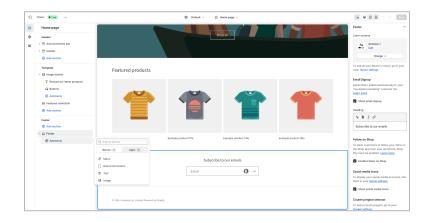
Image: Control (Control (Con

Click on the "Customize" button on the right-side panel (around in right mid-section).

Next, click on the "Footer" menu on the left-hand side menu. Then click on the "Apps" Submenu.



Click on the "Add Block" menu option; There will be a pop-up with options to add Blocks or Apps. Click on the "Apps" option.



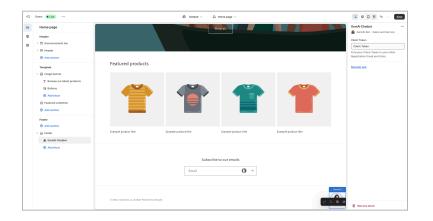
You will see the GentAl Chatbot App in the list. Click on it and it will add the chatbot to your site.

Ð	Dawn Dwe		B Default ∨	S 🛛 🖓 🖓 🖓 🖓 😵 🖓 😵
8	Home page		Shop all	Factor "
\$ \$	Header Header Header Announcement bar Add section		3109.40	Coordinations 1
	Template	Featured products		To edit all your theme's colors, go to your color theme settings.
	T Browse our latest products G Buttons G Add block Featured collection G Add section	*		Exaki Siyang Secretarian salida katamatikah ta year "acception manaking" catamatikah "acception manaking" catamatikah Lann han Con enan kapap Hauding
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	~ 🔛 Footer	Example produ	act title Example product title Example produ	
	And block	C, Search Decks Blocks 4 Apps 2	nie one onenine booker and	CTIDE Follow on Shop To allow customers to follow your store or the Shop app from your storethent, Shop Pay must be enabled. Learnmore
		OvertAl Chattoot OvertAl Bot - Soles and Service	Subscribe to our emails	Enable Follow on Shop
		Sign in with Shop Button	Email O →	Social media icona
		Browse apps built for Online Store 2.0 therees. <u>View apps</u>		To display your social media accounts, lin them in your theme settings.
				Show social media icons
		© 2024, Instanaet_ac, chatted Powered by Shopify		Country/region selector

By now you will see a Chatbot skeleton on the right-hand side bottom corner.

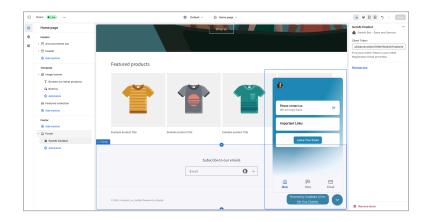
Step 6.3: Authenticate the Bot and You are Done!

Click on GentAl Chatbot App on the left-hand side menu. It will ask for a Client Token.



Refer to your very first email during the registration process. It had two tokens. One was for email verification and another was for the Client Token. Copy the client token from your registration email and paste it Into the "client token" field.

With this step, the bot can communicate with the server. Now, you can verify further your populated and intelligent Chatbot on the right hand bottom corner of your shopify store's website.



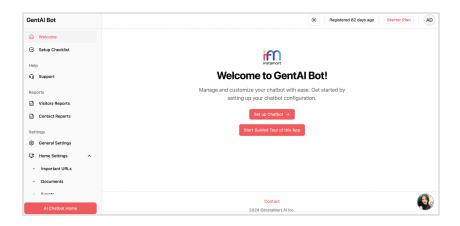
Congratulations! You did a great job! Your chatbot is added to your website!

You can also refer to the video with setup instructions here.

B. App Component Details - Admin Panel and Reports

Component 1 : Admin Panel

Description : This panel is your home for doing settings of your chatbot. The settings include General Settings, Home Settings, AI training management, Security, Payment and Deployment. You can also test your app in the same panel before deployment.



Admin Panel includes a Setup Checklist and a Product Tour

The Setup Checklist is the step by step wizard to guide a user into setting up the Chatbot for General settings till AI training. The Product Tour is the step by step tour guide which walks through the primary components of the admin panel.

Here is the Setup Checklist.

GentAl Bot	* Registered 82 days ago Starter Plan AD
Welcome	Chatbot Setup Checklist
Setup Checklist	Use this checklist to ensure your chatbot is set up for success.
Help	Click on the links to navigate to the corresponding settings pages.
ලි Support	Authentication
Reports	Add Client Token
Visitors Reports	Add a client token for your chatbot.
Contact Reports	General Settings
Settings	
General Settings	Upload your Company Logo Upload your company logo for your chatbot.
C Home Settings ^	V Upload Chatbot Avatar
Important URLs	Upload an avatar for your chatbot.
Documents	✓ Choose a Theme Color
. Evente	Choose a theme color for your chatbot.
Al Chatbot Home	Add a Chatbot Name Add a name for your chatbot.

Here is the Product Tour component.

GentAl Bot	* Registered 82 days ago Starter Plan AD
(i) Welcome	
Setup Checklist	
Help	instamort
This is your chatbot setup checklist. Click on it to check your setup progress here.	Welcome to GentAl Bot!
it to check your setup progress here.	Manage and customize your chatbot with ease. Get started by
Skip Next (1/40)	setting up your chatbot configuration.
Contact Reports	Set up Chatbot ⇒
Settings	Start Guided Tour of this App
General Settings	
C Home Settings	
Important URLs	
Documents	
Events	
Al Chatbot Home	Contact
Architect rome	2024 @InstaMart.Al Inc.

Component 2 : Reports

Description : The admin panel has two types of reports at this point. These are shopify store owner's data which they can download as these are excellent sales lead generation related datasets. You can download these datasets anytime using the download button.

Here is the first report : Visitor's Report

GentAl Bot			🔆 Registere	d 82 days ago Starter Plan AD
(m) Welcome	Visitors Reports			
Setup Checklist	•			
Help	Download as CSV			
G Support	Question	Answer	Date and Time 🛱	Cookies
Reports		The Client Token is essential for authorization and		
Visitors Reports	What is the significance of adding the Client Token in the Apps	authentication of the Al Chatbot. It is used to connect the Chatbot to the platform and enable it to function	2024-09-	_gid=GA1.2.1338149416.1718596975; _ga_86VEJCYHVY=GS1.1.1718800766.39.0 _ga=GA1.2.388760075.1716579534;
Contact Reports	section for setting up Home Features in the Al Chatbot?	properly. Without the Client Token, the Chatbot will not be able to access the necessary resources and data to operate effectively.	01T05:42:58	_ga=Gh12:388760075171657954; _gat_gtag_UA_295544578_1=1; _ga_9WH5VV5ZGY=GS1.1.1718818296.54
8 General Settings		GentAl will meet and greet customers by providing		_gid=GA1.2.1338149416.1718596975;
C Home Settings	How will GentAI meet and greet?	training and customer service 24/7, helping save money and providing assistance in orienting with business services quickly.	2024-09- 01T05:32:09	_ga_86VEJCYHVY=GS1.1.1718800766.39.0 _ga=GA1.2.388760075.1716579534; _ga_9WH5VV5ZGY=GS1.1.1718818296.54.
Important URLs		GentAl will meet and greet customers by providing		_gid=GA1.2.1338149416.1718596975;
Documents	How will GentAI meet and greet?	training, customer service 24/7, and orienting them with business services quickly through an Al Chatbot	2024-08- 30T06:38:43	_ga_86VEJCYHVY=GS1.1.1718800766.39.0 _ga=GA1.2.388760075.1716579534;
Events		on a website.		_ga_9WH5VV5ZGY=GS1.1.1718818296.54.
Al Chatbot Home	What are the benefits of offering a	By offering a 7-day free trial without requiring a credit card, users can enjoy the trial without the risk of being	2024-08-	_gid=GA1.2.1338149416.1718596

Here is the second report : Contact Report

GentAl Bot			-i¢:- Regi	stered 82 days ago Starter Plan
 Welcome Setup Checklist 	Contact Report	S		
Help	Download as CSV			
බ Support	Email	Name	Phone	Created At
Reports				
Visitors Reports	••• 🖸 🗸 Scr	een Shot 2024-09-04 at 11.1 ි	Q 1 2 - 1 0 Qs	earch
Contact Reports Settings General Settings C. Home Settings		(
Important URLs		You'v	e gone Incognito	
Documents Events		won't change how data is collected by	your activity, so you can browse more privately. T r websites you visit and the services they use, incl sading list items will be saved. <u>Learn more</u>	
AI Chatbot Home		Chrome won't save: • Your browsing history • Cookies and site data	Your activity might still be visible to: • Websites you visit • Your employer or school	