Setup Guideline and App Component Details
GentAI Bot - Sales and Service
For Shopify Store Websites
Ver 5.0; Product Release 5.0

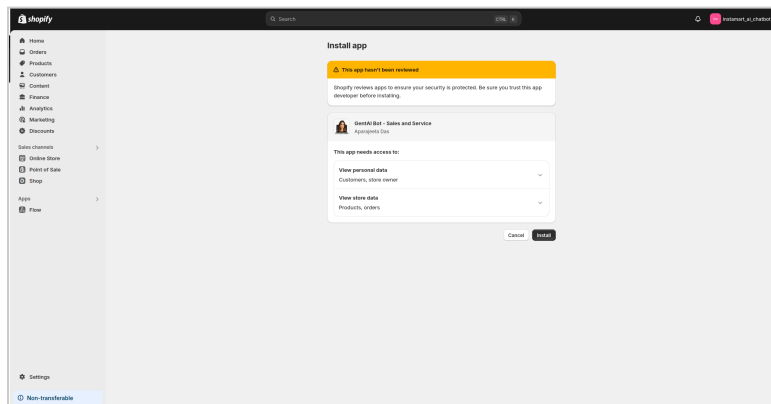# A.   Setup Guideline - Step by Step

Step 1: Installation and Sign In

Step 1.1: Install GentAI 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, "GentAI Bot - Sales and Service"; Then select the store. Click on Install;

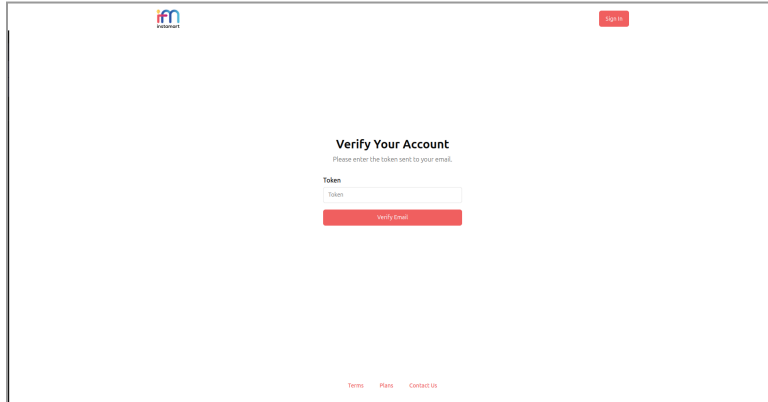It will take you to GentAI's Sign Up page along with oAuth.

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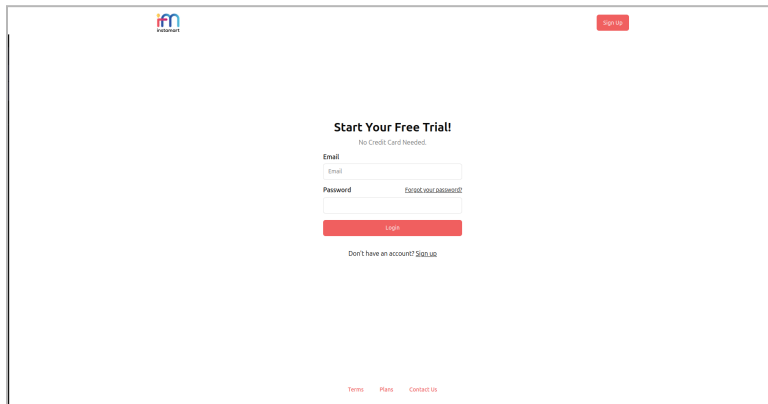
You will then be taken to the verification screen.
Check your inbox for the registration email. You will receive an email with the subject, "Welcome! Thank you for signing up to AI Chatbot!". In that email, you will get a Verification token and a Client Token.

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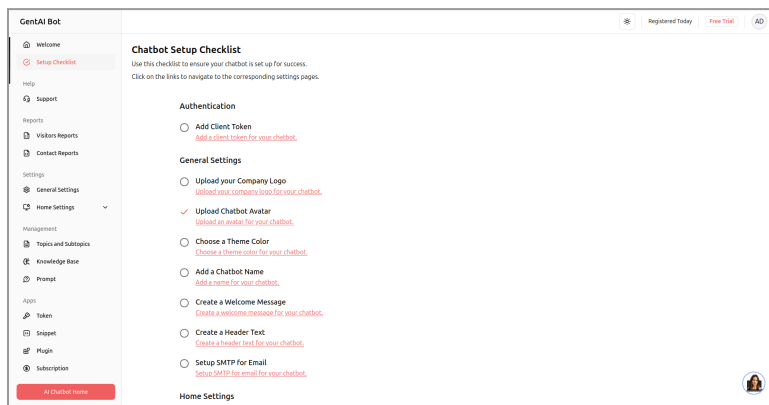

This will take you to the Sign In page.

Please Sign In.

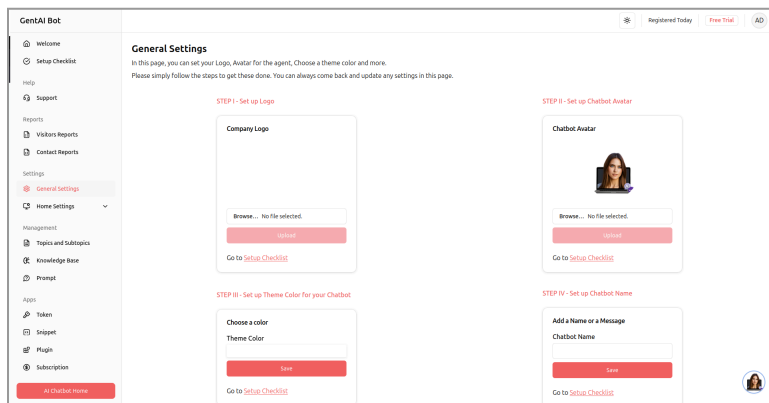# Step 2: Chatbot Content Setup and Bot Training

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.

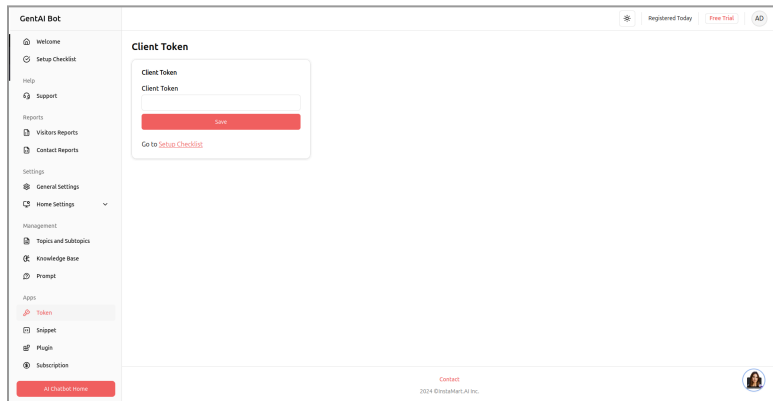Follow the Chatbot Setup Checklist and Populate all.

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

In order for the Chatbot to communicate and retrieve data from the backend, you will need to add the Client Token for authorization.
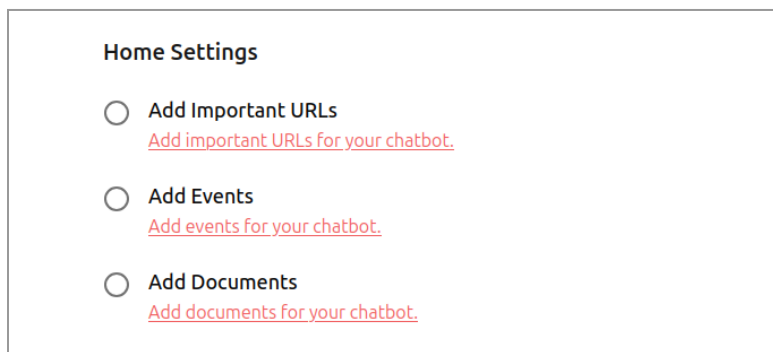
Copy the "Client Token" from your registration email and enter into Apps - > Token (Client Token field) and save.
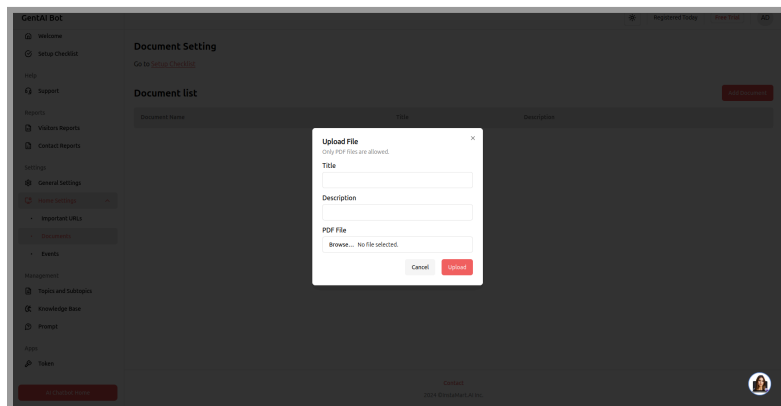

Test your Chatbot on the right hand side bottom corner.

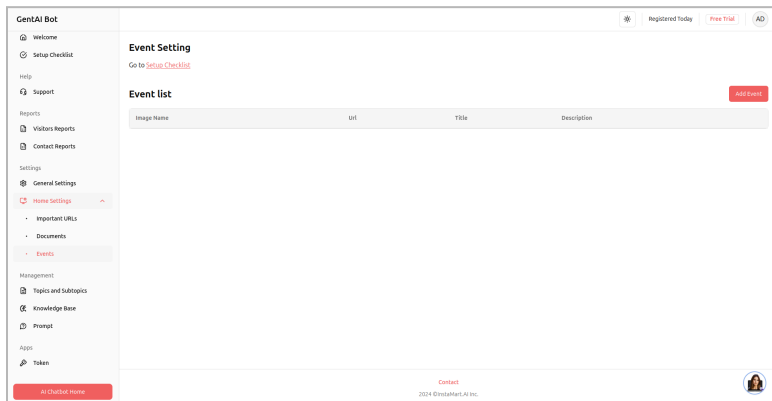## Step 2.2: Perform Home Settings using Setup Checklist

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.

Step 2.3: Train the AI Chatbot using Content Management Setup Checklist
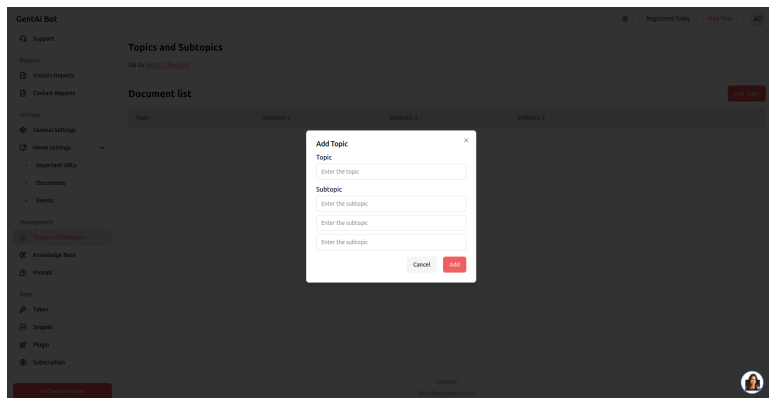
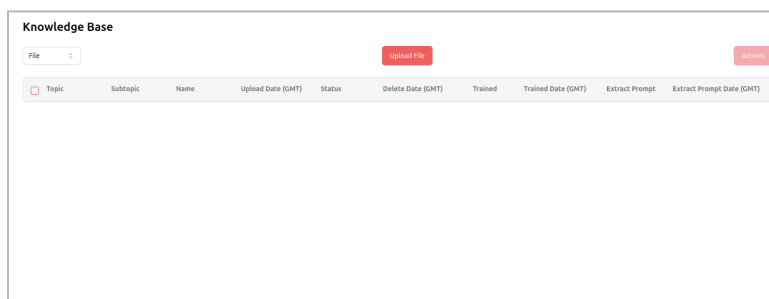Here is the Content Management settings checklist.

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.
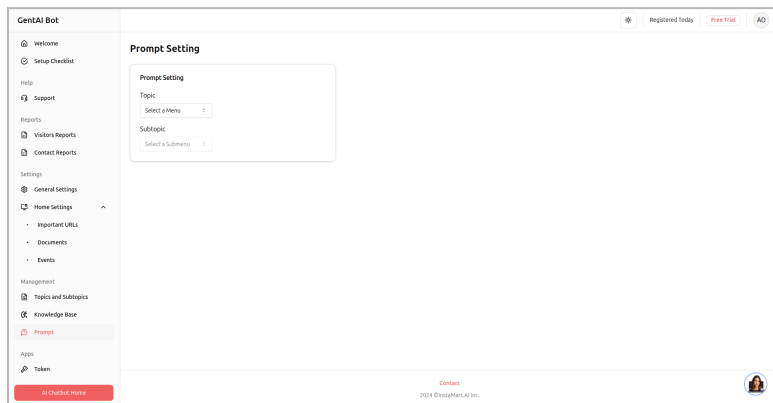

In the Knowledge Base page, click on the Menu **FILE** button to toggle between File and URL, click on the **Upload File or Upload URL** button which opens Dialog to upload **File / URL.**

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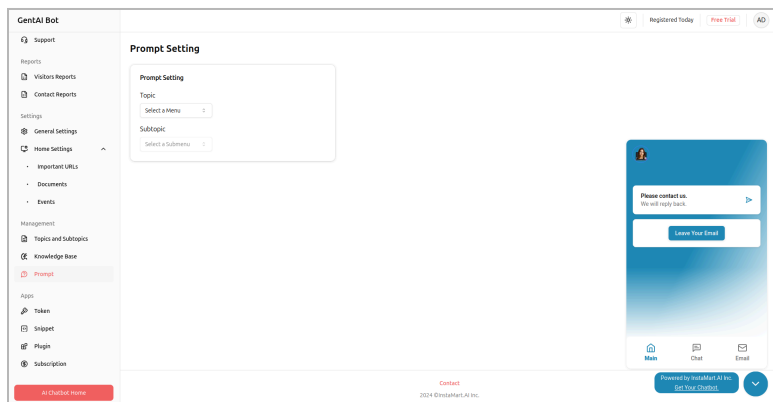
Here is the Prompt Setting page. You can check the automated generated prompt/s by selecting your topic and subtopics. Prompts will be generated based on the amount and quality of content you have uploaded in the Knowledge Base and trained with.
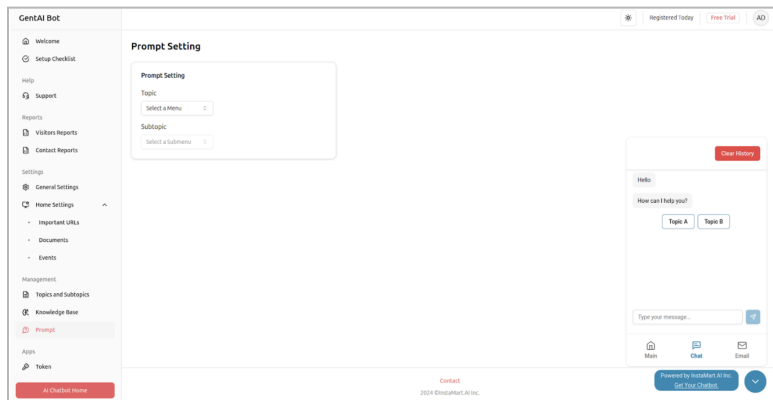

Step 3: Test Your AI ChatBot

On the right-hand side bottom area of your page, you will see your chatbot.
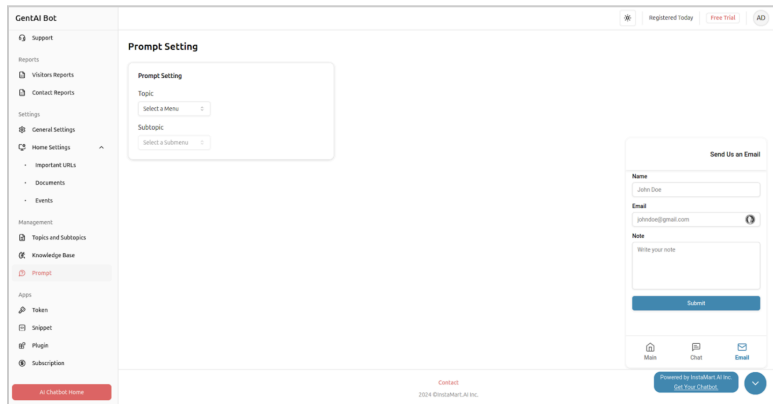
Step 3.1: Test the Home tab.
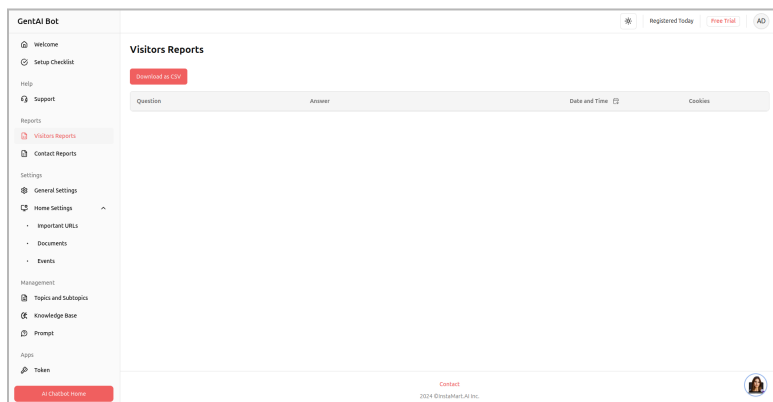
Step 3.2: Test the Chat tab.
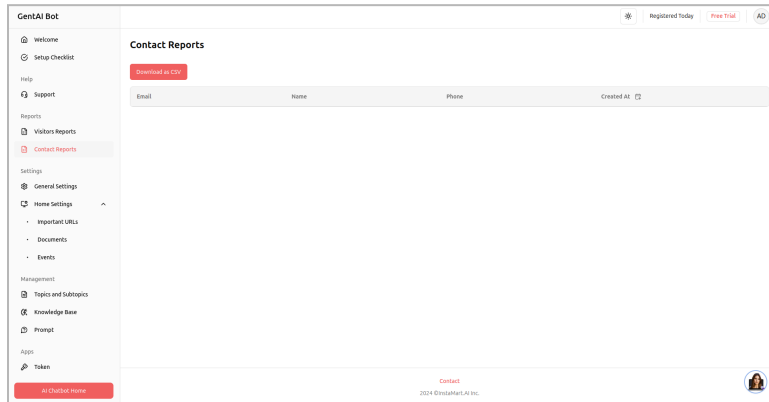

Step 3.3: Test the Email tab.

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

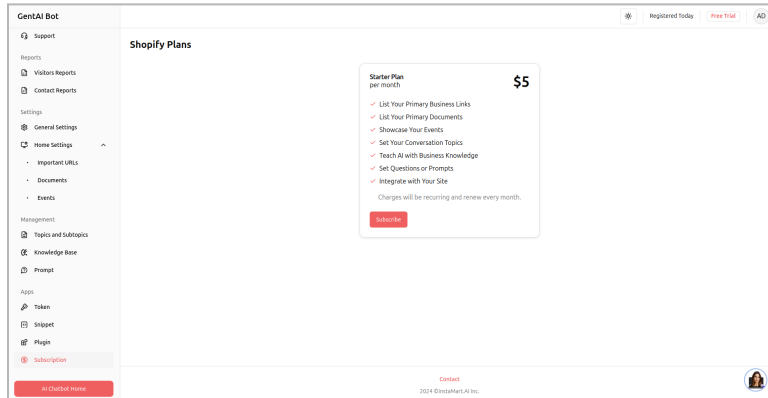**Step 4.1:** Click on Visitors menu item to access Visitors' Report

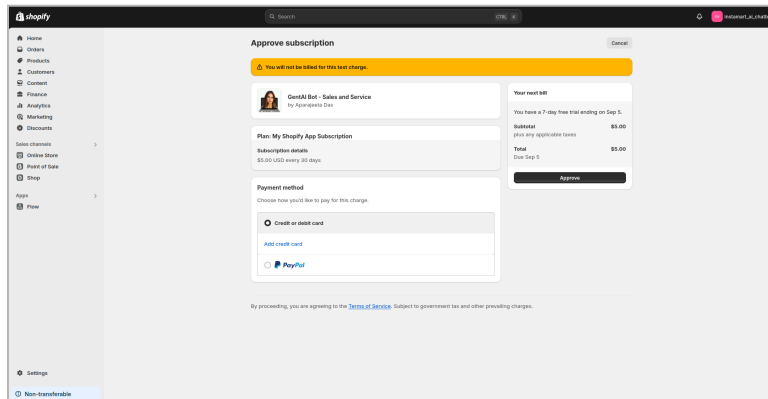**Step 4.2:** Click on Contacts menu item to access Contacts' Report

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.

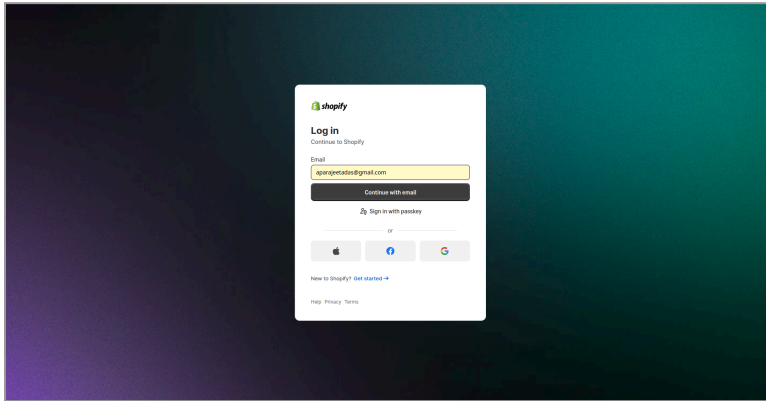## **Step 5.2:** Payment Authorization using Shopify Billing

You can approve the payment authorisation.

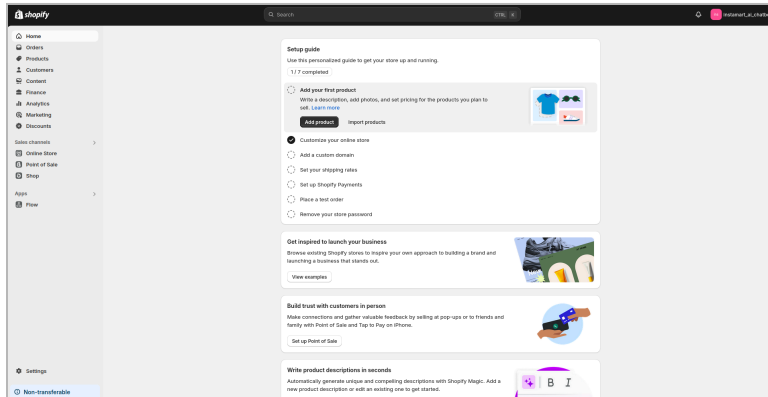# Step 6: Deploy the Bot to Shopify Store's Website

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

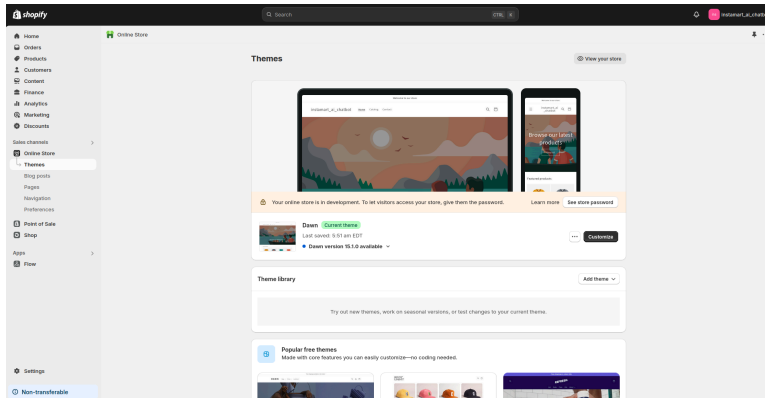(i.e.https://admin.shopify.com/store/instamart-ai-chatbot).

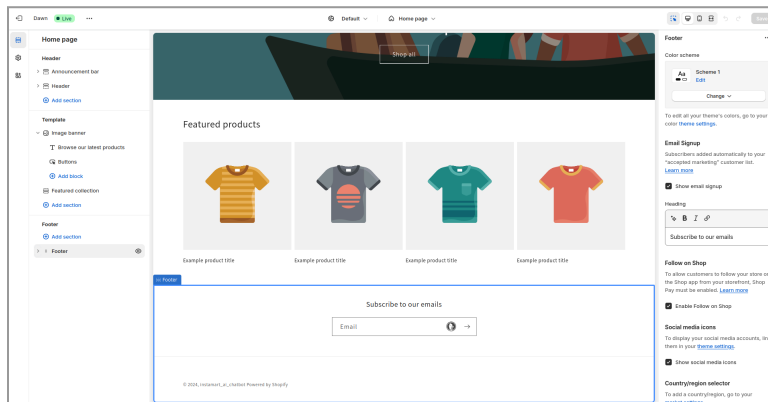## Step 6.2: Enable Theme App Extension

Open Online Store by clicking on "Online Store" menu option on the left-hand side menu.
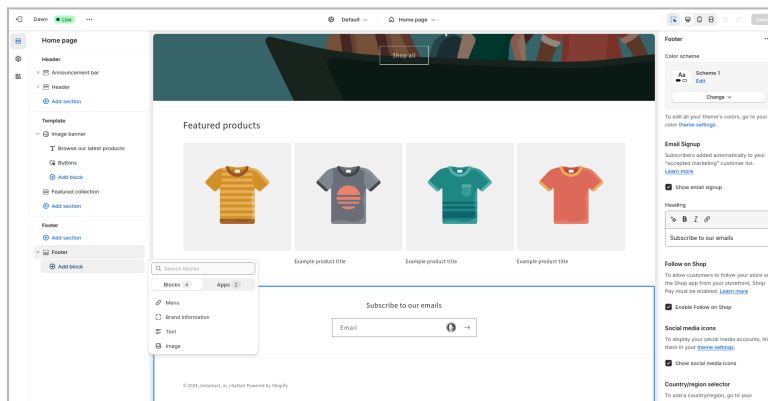
Click on the "Customize" button on the right-side panel (around in right mid-section).
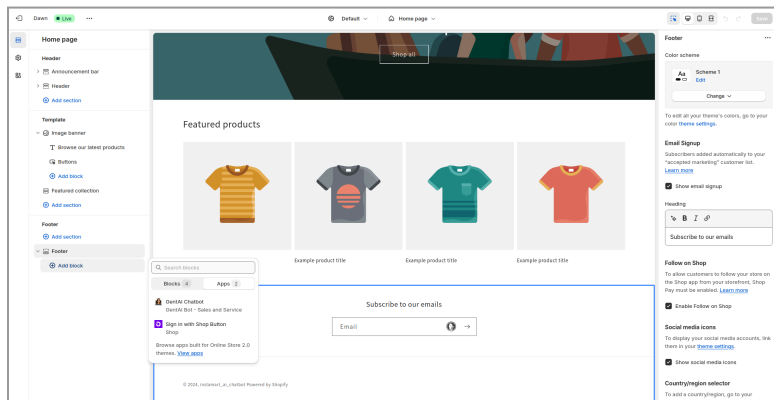

Next, click on the "Footer" menu on the left-hand side menu. Then click on the "Apps" Submenu.

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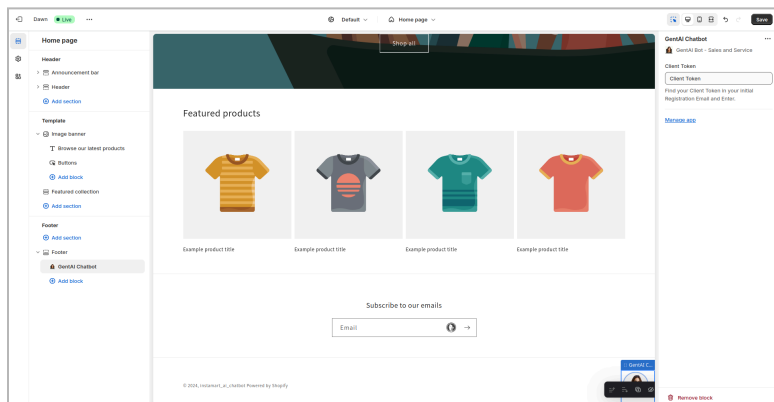
You will see the GentAI Chatbot App in the list. Click on it and it will add the chatbot to your site.

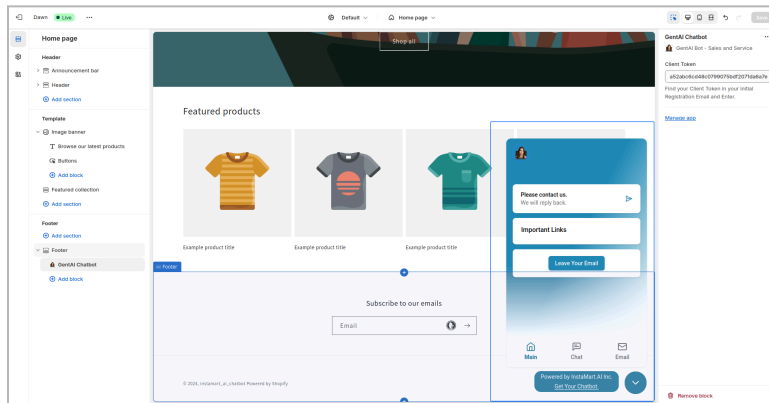By now you will see a Chatbot skeleton on the right-hand side bottom corner.

Step 6.3: Authenticate the Bot and You are Done!

Click on GentAI 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.
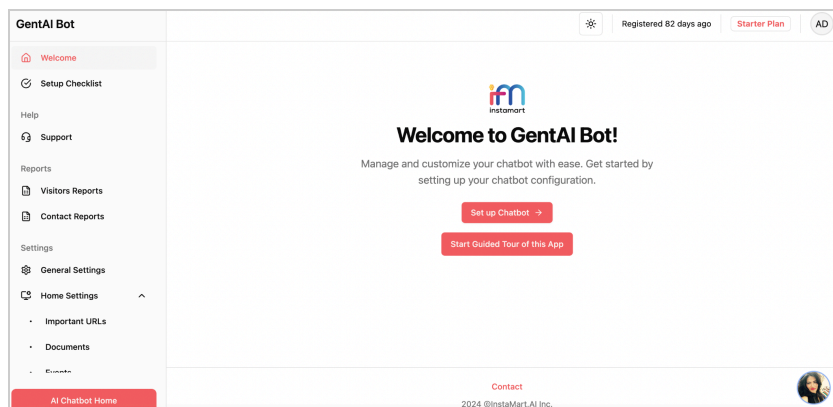

Congratulations! You did a great job! Your chatbot is added to your website!

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

B.   App Component Details - Admin Panel and Reports
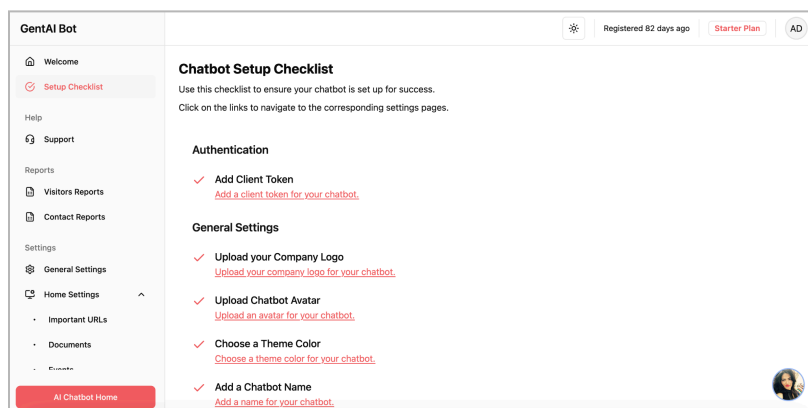
Component 1 : Admin Panel

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.
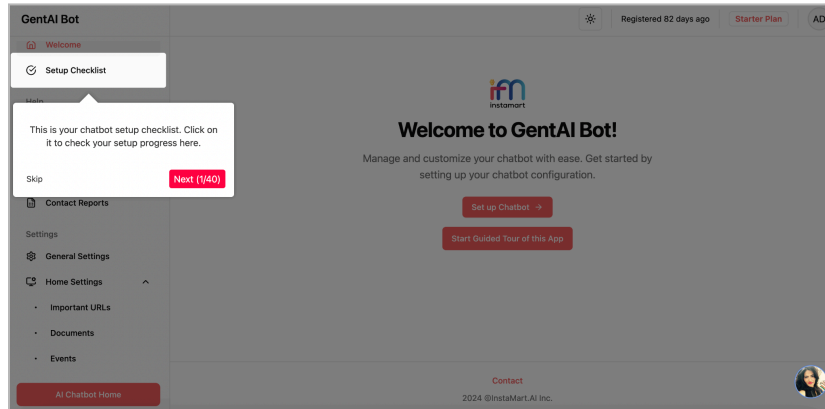

Admin Panel includes a Setup Checklist and a Product Tour

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.

Here is the Product Tour component.

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

Here is the second report : Contact Report