

Sales & Support Agent Customer Guide





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Following our recent consultation and agreement, your new **Sales & Support AI Agent** has now been prepared for your website.

This chatbot is designed to give your visitors instant answers, guide them toward the right products or services, and help capture new leads for your business.

The following is a short guide to how the Sales & Support Agent works, what it does and what your website visitors can expect.



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1. Introduction

Following our recent consultation and agreement, your new **Sales & Support AI Agent** has now been prepared for your website. This chatbot is designed to give your visitors instant answers, guide them toward the right products or services, and help capture new leads for your business.

Unlike a simple live chat tool, your Sales & Support Agent works **24 hours a day, 7 days a week**, providing consistent, reliable support even when your team is unavailable. It uses the business information you've already provided. Such as details from your website, FAQs, and service information, to deliver accurate and helpful responses.

The Sales & Support Agent is not here to replace your team. Instead, it acts as a **first point of contact**, handling common questions and routine enquiries so that your staff can focus on higher-value conversations and customer relationships.

Our agency will continue to manage and update the Sales & Support Agent on your behalf. Your role is simply to keep us informed of any business changes (such as new services, updated pricing, or promotions), so we can ensure the Sales & Support Agent always reflects the latest and most accurate information.

This manual will explain how the Sales & Support Agent works in practice, what you can expect from it, how your visitors will use it, and what you need to do to get the most out of it.



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2. What the Sales & Support Agent Can Do (and What It Cannot)

Your Sales & Support AI Chatbot is designed to help customers quickly find the information they need and guide them to the right place on your website. While it is a powerful tool, it's important to understand what it can and cannot do.

What the Sales & Support Agent Can Do

- **Answer Common Questions**

The Sales & Support Agent can provide instant responses about your business, such as opening hours, service details, pricing, or promotions.

- **Guide Visitors to the Right Page**

If a visitor wants to make a purchase, claim an offer, or contact sales, the Sales & Support Agent can share a direct link to the relevant web page, form, or button.

- **Support the Sales Process**

By pointing customers to the correct product page, enquiry form, or special offer, the Sales & Support Agent helps move visitors closer to a purchase or contact.

- **Provide Contact Options**

The Sales & Support Agent can give visitors your contact details (e.g. phone number, email address). This can be set up so visitors can make a one-click phone call or open an email message directly.



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What the Sales & Support Agent Cannot Do

- **Close Sales Directly**

The Sales & Support Agent cannot process payments or complete purchases inside the chat. Instead, it will provide a link to your checkout page or product page.

- **Collect and Store Customer Details**

The Sales & Support Agent does not record or forward information entered by a visitor. Instead, it guides them to your existing contact form, booking form, or provides your direct contact details (phone/email).

- **Replace Human Interaction**

For complex or personalised enquiries, the Sales & Support Agent will direct the visitor to your sales contact form or give them your team's contact details i.e. clickable phone number or email address.

- **Operate Outside the Website**

The Sales & Support Agent only communicates through text responses and clickable links. It cannot send emails, make phone calls, or carry out tasks outside the chat window.

How This Works in Practice

- A customer asks: *"I'd like to buy [product]."*
→ The Sales & Support Agent responds with: *"Great! You can purchase it directly here: [URL]."*
- A visitor says: *"I want to speak to sales."*
→ The Sales & Support Agent points them to the sales enquiry form on your site or gives them a clickable phone number.
- A customer asks about a special offer.
→ The Sales & Support Agent provides the link to the relevant page or button.



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- A visitor asks for your phone number.
→ The Sales & Support Agent replies with: *“You can call us directly here: [clickable phone link].”*

In short, the Sales & Support Agent acts as a **guide to the right action**. It helps customers find what they need quickly, but the final step (filling in a form, calling, emailing, or purchasing etc.) always happens through your website or contact channels.



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3. How It Works (Simple Explanation)

Your Sales & Support AI Chatbot has been set up to work directly with the information from your business. It is not a “general” chatbot, it has been trained specifically on your website content, your services, and the details you provided during setup. This means its answers are focused on **your business only**.

Here’s how it works in simple terms:

1. **Visitor asks a question**

When someone visits your website and types a question into the chatbot, the chatbot instantly analyses the request.

2. **The chatbot finds the best match**

Using the business information we provided during installation (website pages, FAQs, product details, and any extra notes you supplied), the chatbot generates a natural, conversational answer.

3. **Guidance through links**

If the visitor needs to take action, such as buying a product, filling in a form, or contacting you, the chatbot will provide a **clickable link** or contact detail to guide them to the right place.

4. **Always text only**

The chatbot can only respond in text. It does not process payments, make calls, or send emails. Instead, it provides the information and links the visitor needs to continue.

Who Keeps It Up to Date?

- Our agency handles all the technical work, training, and updates for you.
- If you add a new product, service, or promotion, simply let us



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know and we'll make sure the chatbot reflects it.

- This ensures your chatbot always provides **current and accurate information** without you needing to manage anything directly.

Does the Chatbot Learn Over Time?

- The chatbot does not “learn” on its own from conversations.
- Instead, it relies on the business information provided by us during setup and updates.
- If visitors ask questions it cannot answer, we can review this and update the chatbot's knowledge so it performs better over time.

In short: **Your role is simply to keep us informed of changes in your business. We handle everything else.**



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4. Your Role as the Business Owner

The chatbot has been designed to run in the background with very little effort from you. Our agency manages the technical setup, training, and ongoing updates. Your main responsibility is simply to keep us informed about changes in your business.

What You Need to Do

- **Keep Information Current**

If your services, pricing, opening hours, promotions, or offers change, let us know so we can update the chatbot.

- **Share New Materials**

If you create new FAQs, brochures, or special pages on your website, pass these on to us. We'll use them to improve the chatbot's responses.

- **Tell Us About Gaps**

If you notice the chatbot doesn't answer a certain type of question well, inform us. We can adjust its knowledge so it handles those queries better in the future.

- **Decide When a Human Should Step In**

You set the rules for when enquiries should move from the chatbot to your sales or support team. For example, complex orders, large purchases, or sensitive enquiries can be directed to your contact form or team member.

What You Do *Not* Need to Do

- You don't need to train the chatbot yourself.
- You don't need to manage software or upload files.
- You don't need to troubleshoot, that's our job.



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Summary

Your role is to act as the **source of truth** for your business information. Keep us updated, and we'll make sure your chatbot always gives accurate, helpful, and professional responses to your customers.



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5. How Visitors Use the Chatbot

From a visitor's point of view, the chatbot is simple and easy to use. It appears as a small avatar on your website, in the lower right corner of the screen, and is available on every page where it has been installed.

It is opened, and a conversation started, by clicking the avatar.

If it is not clicked within 5 seconds of the visitor opening the web page, it will prompt the visitor with a speech bubble and offer to help.

The Visitor Journey

1. Starting a Chat

A visitor clicks on the chat icon or box to open the conversation window. They can then type a question just like they would in a messaging app.

A default question is displayed immediately under the chat box and if clicked will automatically start the conversation.

2. Getting Instant Answers

The chatbot responds immediately with information from your business — such as opening hours, services, pricing, or directions to the right place or page.

3. Taking Action

If the visitor wants to do something specific (buy a product, request a quote, claim an offer, or contact sales), the chatbot provides a **link, button, or contact detail** to enable the visitor to what they asked.

- Clicking the link takes them directly to the relevant page or form.



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- If it's a phone number or email address, one click can start a call or open a new email message.

4. Continuing the Conversation

The visitor can ask follow-up questions and the chatbot will keep answering as long as they need.

Examples of Common Uses

- Asking: *"What time do you open tomorrow?"*
→ Chatbot replies: *"We open at 9:00 AM. You can see full opening hours here: [link]."*
- Asking: *"I want to buy [product]."*
→ Chatbot replies: *"You can purchase it here: [product page link]."*
- Asking: *"Can I speak to sales?" (out of hours)*
→ Chatbot replies: *"Of course. Please fill in this form and our team will contact you: [sales enquiry form link]."*
- Asking: *"Can I speak to sales?" (in hours)*
→ Chatbot replies: *"Of course. If you are on a mobile phone just click this number [sales enquiry telephone number]."*

Key Point

The chatbot always **guides visitors to the right action**, but the final step (purchasing, booking, contacting your team) happens on your website or through your existing contact channels.



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6. Benefits to Your Business

Your Sales & Support AI Agent is designed to make life easier for both your customers and your team. Here are the main benefits you can expect:

24/7 Availability

The chatbot is always online, ready to answer questions day or night. Customers don't have to wait until your business is open to get the information they need.

Instant, Consistent Responses

Every visitor gets an immediate reply, with answers that are clear and consistent. This reduces confusion and ensures everyone receives the same level of service.

Reduced Workload for Staff

By handling common questions. Such as opening hours, pricing, and basic enquiries, the chatbot frees up your staff to focus on more complex or valuable customer interactions.

Increased Customer Engagement

Visitors are more likely to stay on your website if they can quickly get answers. The chatbot helps guide them towards the right pages, offers, or products, improving the chances of converting them into customers.

Better Lead Direction

Instead of losing a potential customer because they couldn't find the right place to act, the chatbot points them directly to your contact form, product page, or special offer.



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Simple Maintenance

You don't need to manage the chatbot yourself. Our agency updates it for you whenever your business information changes, so it stays accurate with minimal effort on your part.

In short: The chatbot acts as an **extra team member**, providing round-the-clock support, answering questions instantly, and directing visitors towards an action. All while reducing the workload for your staff.



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7. Support & Maintenance

Your Sales & Support AI Chatbot has been designed to run smoothly in the background with very little input from you. Our agency is responsible for all technical setup, updates, and ongoing maintenance.

What We Do (Agency Responsibilities)

- **Setup & Configuration**
We install the chatbot on your website and connect it to your business information.
- **Training & Updates**
We keep the chatbot accurate by updating it when your services, pricing, or offers change.
- **Monitoring & Improvements**
We can review chatbot conversations to identify gaps and improve responses over time.
- **Technical Support**
If any issues occur, we handle all troubleshooting and fixes.

What You Need to Do (Your Responsibilities)

- **Provide Business Updates**
Let us know when something changes in your business (e.g. new services, updated pricing, or special promotions).
- **Report Issues or Gaps**
If you notice the chatbot isn't answering something correctly, tell us, we'll fix it.
- **Use the Chatbot as a Guide**
Remember, the chatbot directs visitors to your contact forms,



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product pages, or contact details. It does not replace these tools, so they should remain up to date.

How to Get Support

If you need changes, updates, or encounter any issues, simply contact our support team. We'll handle the technical work for you . There's no need to adjust the chatbot yourself.

In summary, **we take care of the chatbot, you take care of keeping us informed.**



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8. FAQs for You (the Customer)

Q1. What if the chatbot gives the wrong answer?

If you notice an incorrect or unclear response, just let us know. We'll update the chatbot with the right information.

Q2. Can the chatbot be turned off?

Yes. If you want the chatbot temporarily disabled (for example, during a promotion change) contact us and we can hide or pause it.

Q3. How do I update my business information in the chatbot?

You don't need to update it yourself. Simply send us the changes (new services, prices, offers, etc.) and we'll make sure the chatbot reflects them.

Q4. Can the chatbot take bookings or payments?

No. The chatbot cannot process transactions. Instead, it provides visitors with links to your booking page, product pages, or payment system.

Q5. Does the chatbot store customer details?

No. It does not collect or keep customer information. Instead, it directs visitors to your website forms, contact details, or other channels where details can be collected securely.

Q6. Will I see what people ask the chatbot?

No, the Sales & Support agent does not save any conversations or customer details. This ensures you stay compliant with any GDPR or other data protection requirements in your country.



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Q7. Does the chatbot learn automatically?

No. It doesn't change on its own. All improvements are managed by us, based on your updates and customer feedback.