

Chatbot Manager Pro

A Powerful WordPress Plugin.
Creates And Manages Multiple
Public Facing Chatbots



Chatbot Manager Pro

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1. Introduction

In this guide, you'll learn how to create a fully functional, public-facing, AI-powered chatbot using the **Chatbot HTML Manager** plugin for WordPress.

The Chatbot Manager simplifies the process of building and deploying chatbots by automating most of the setup work. It provides a quick and efficient way to build **custom AI-powered assistants** for your business or your clients — all from within your WordPress dashboard.

1.1 What the Chatbot Manager Does

The plugin enables you to:

- **Create and manage multiple chatbots** for different clients from one central dashboard.
- **Generate an embeddable HTML script** for each chatbot that can be placed on any website — not just WordPress.
- **Remotely disable or update chatbots** without accessing a client's website.
- **Train assistants on specific business data**, such as:
 - Product or service catalogues
 - Price lists
 - Contact information
 - FAQs and support documents

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This flexibility allows you to deliver **AI-driven customer service, sales assistance, and lead generation** without needing developer intervention for every change.

Chatbot HTML Manager

Create Chatbots

1. Complete chatbot form below and Save Chatbot.
2. Click Create Assistant under Saved Chatbots.

Manage Chatbots

1. Click Edit under Saved Chatbots.
2. Edit chatbot form as required and Save Chatbot.
3. Click Update Assistant under Saved Chatbots.

Client Name

A unique reference to identify this chatbot client.

[OpenAI API Key](#)

OpenAI API Key used to create assistant. Click link above to get key.

[Assistant ID](#)

OpenAI assistant_id is created when the assistant is created.

Avatar Style

This will display male or female default images for your chatbot.

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1.2 Why Use the Chatbot Manager

Unlike static pre-programmed bots, the Chatbot Manager connects directly to **OpenAI's Assistant API**, giving your chatbot access to real conversational intelligence.

Your assistants can:

- Answer a wide range of customer questions naturally.
- Guide users through support or sales journeys.
- Promote offers and generate qualified leads automatically.

The plugin centralizes every element of chatbot creation — from **assistant setup** to **HTML embedding** — inside a single, user-friendly admin page. This provides complete control over design, configuration, and deployment.

1.3 Templates and Flexibility

You can create any type of chatbot using pre-built templates as starting points. The Chatbot Manager includes templates for:

- **Sales & Support Agents**
- **Product Inquiry Bots**
- **Booking or Appointment Assistants**
- **E-commerce Helpers**
- **Knowledge Base/FAQ bots**
- **Lead Qualifiers**

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- Product Advisors
- Restaurant Hosts
- And More

Each template can be customized or expanded to match your client's brand, data, and goals.

You can even create your own templates for specialized use cases.

The screenshot shows the 'Assistant Knowledge' configuration page. On the left, there are three sections: 'Instruction Template' with a file path, 'Extended Instructions (editable)' with a description of placeholders, and 'Business Name' with a placeholder instruction. On the right, a dropdown menu is open, showing a list of templates to select from. The currently selected template is 'ecommerce_helper.txt'.

Assistant Knowledge

Instruction Template
Files are read from `/wp-content/plugins/html-chatbot-manager/support/`

Extended Instructions (editable)
This is preloaded from `<template>_extended.txt`. You can edit it here. Placeholders like `*PN*` still work.

Business Name
use placeholder `*BN*`

ecommerce_helper.txt

— Select a template —

- assistant_knowledge_placeholder_only.txt
- booking_reception.txt
- ecommerce_helper.txt
- knowledge_base_mixed.txt
- lead_qualifier.txt
- product_advisor.txt
- restaurant_host.txt
- sales_only.txt
- sales_support.txt
- support_only.txt
- [48 hour Agency] sales_and_support_agent_instructions.txt

Flatley Treats

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1.4 Key Advantages

- Runs on **almost any website**, not only WordPress.
- Integrates easily with **OpenAI Assistants**, allowing advanced AI behaviour.
- Lets you **train assistants on your own data** for accurate, context-specific responses.
- Provides **remote management**, including activation and deactivation.
- Supports multiple clients and assistants within a single interface.

By using the Chatbot Manager, you elevate your chatbot service to an entirely new level — delivering **smart, conversational, and customizable AI assistants** for any industry.

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2. Installing the Chatbot Manager Plugin

This section explains how to install, activate, and access the **Chatbot HTML Manager** plugin on your WordPress site. Once installed, you'll be ready to start creating and managing custom AI chatbots for your own business or your clients.

2.1 System Requirements

Before installation, ensure your environment meets these basic requirements:

- A WordPress website with administrative access.
- PHP 8 or higher.
- A valid **OpenAI account** and API key.
- Internet access to connect the plugin to the OpenAI platform.

2.2 Downloading the Plugin

You'll need the **Chatbot HTML Manager plugin ZIP file** to install it.

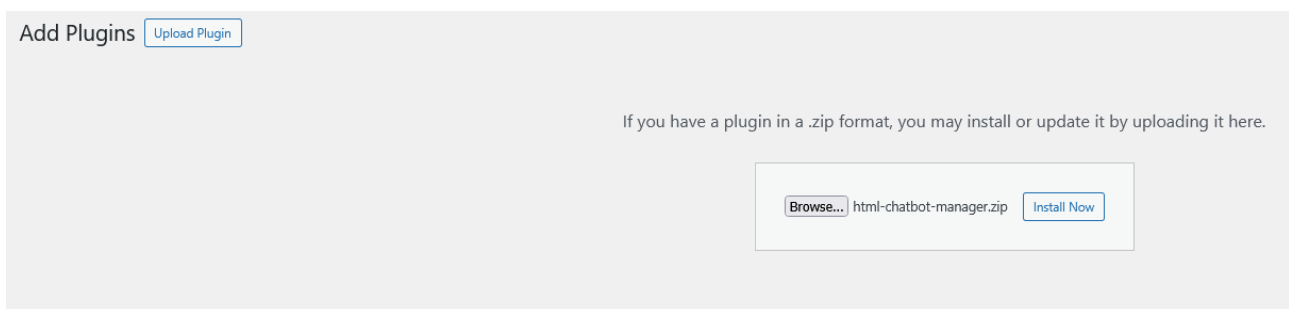
1. Obtain the plugin package (`html-chatbot-manager.zip`) from your client area or the official download page.
2. Save the file to a convenient location on your computer, such as your desktop or downloads folder.

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2.3 Uploading the Plugin to WordPress

1. Log in to your **WordPress Admin Dashboard**.
2. Navigate to **Plugins** → **Add New**.
3. Click the **Upload Plugin** button at the top of the page.
4. Click **Choose File**, select `html-chatbot-manager.zip`, and click **Install Now**.



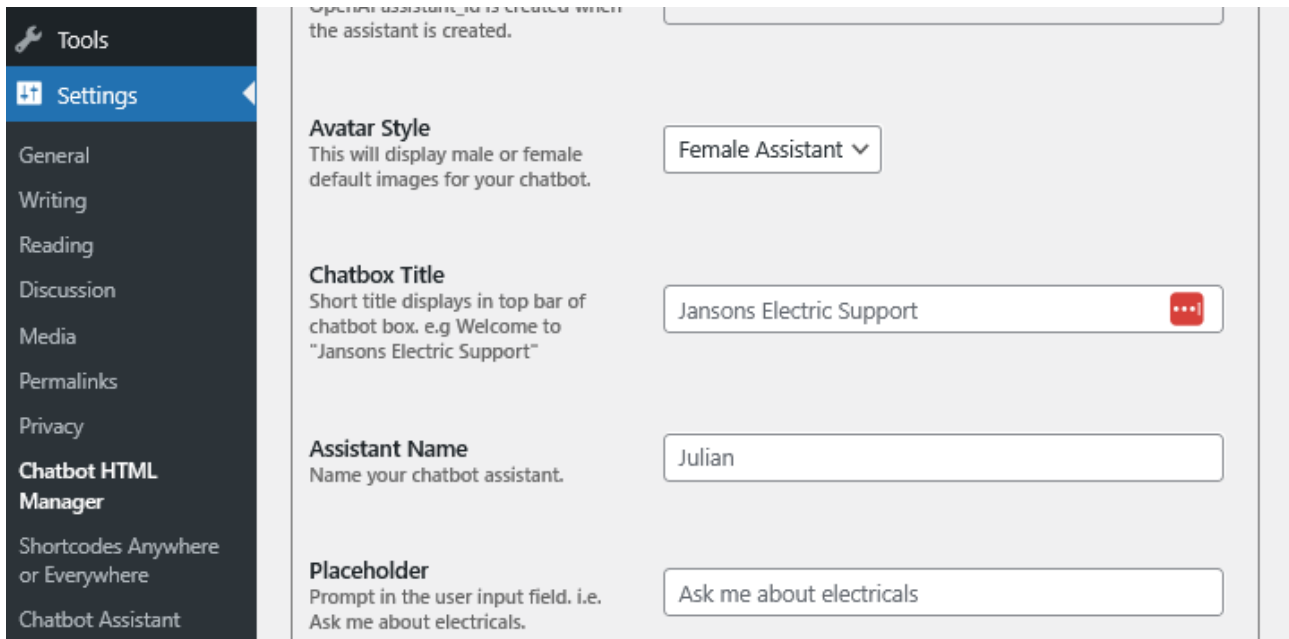
2.4 Activating the Plugin

1. Once installation completes, click **Activate Plugin**.

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2. After activation, a new menu option will appear in your dashboard:

Settings → Chatbot HTML Manager.



The screenshot shows the 'Chatbot HTML Manager' settings page. On the left is a dark sidebar with a menu containing 'Tools', 'Settings' (highlighted), 'General', 'Writing', 'Reading', 'Discussion', 'Media', 'Permalinks', 'Privacy', 'Chatbot HTML Manager' (bold), 'Shortcodes Anywhere or Everywhere', and 'Chatbot Assistant'. The main content area has a light gray background and contains four settings sections:

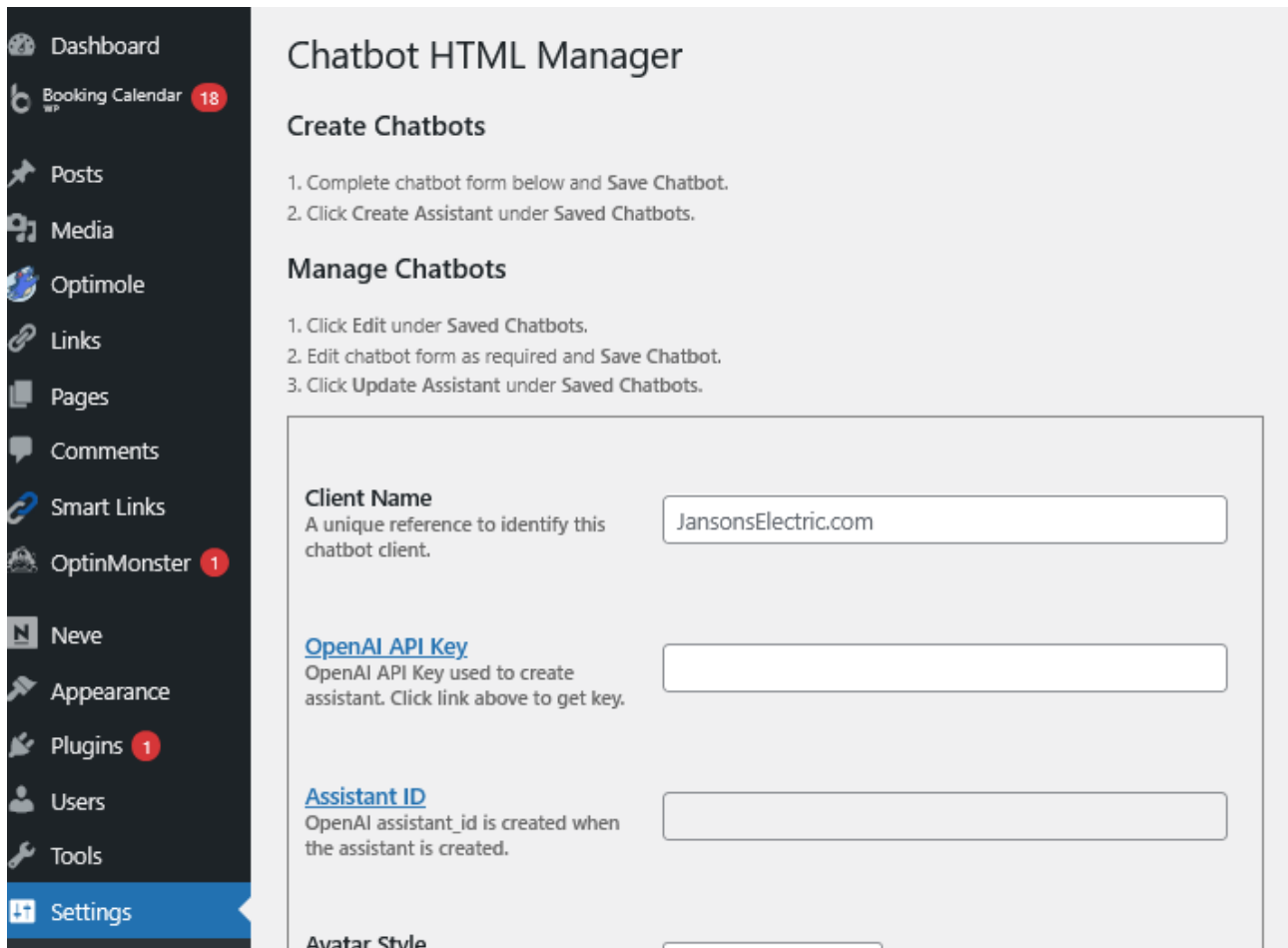
- Avatar Style**: A dropdown menu set to 'Female Assistant'. Description: 'This will display male or female default images for your chatbot.'
- Chatbox Title**: A text input field containing 'Jansons Electric Support' with a red close button on the right. Description: 'Short title displays in top bar of chatbot box. e.g Welcome to "Jansons Electric Support"'
- Assistant Name**: A text input field containing 'Julian'. Description: 'Name your chatbot assistant.'
- Placeholder**: A text input field containing 'Ask me about electricals'. Description: 'Prompt in the user input field. i.e. Ask me about electricals.'

2.5 Accessing the Chatbot HTML Manager

Go to **Settings → Chatbot HTML Manager**.

You'll be presented with the main plugin dashboard, which is divided into several key sections for managing your assistants and chatbots.

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The screenshot displays the 'Chatbot HTML Manager' interface. On the left is a dark sidebar with navigation links: Dashboard, Booking Calendar (with a red '18' badge), Posts, Media, Optimole, Links, Pages, Comments, Smart Links, OptinMonster (with a red '1' badge), Neve, Appearance, Plugins (with a red '1' badge), Users, Tools, and Settings (highlighted in blue). The main content area is titled 'Chatbot HTML Manager' and contains two sections: 'Create Chatbots' and 'Manage Chatbots'. The 'Create Chatbots' section has two numbered steps: 1. Complete chatbot form below and Save Chatbot. 2. Click Create Assistant under Saved Chatbots. The 'Manage Chatbots' section has three numbered steps: 1. Click Edit under Saved Chatbots. 2. Edit chatbot form as required and Save Chatbot. 3. Click Update Assistant under Saved Chatbots. Below these instructions is a form with three input fields: 'Client Name' (with a description 'A unique reference to identify this chatbot client.' and the value 'JansonsElectric.com'), 'OpenAI API Key' (with a description 'OpenAI API Key used to create assistant. Click link above to get key.' and a blue link 'OpenAI API Key'), and 'Assistant ID' (with a description 'OpenAI assistant_id is created when the assistant is created.' and a blue link 'Assistant ID'). The 'Avatar Style' label is partially visible at the bottom of the form.

Chatbot HTML Manager

Create Chatbots

1. Complete chatbot form below and Save Chatbot.
2. Click Create Assistant under Saved Chatbots.

Manage Chatbots

1. Click Edit under Saved Chatbots.
2. Edit chatbot form as required and Save Chatbot.
3. Click Update Assistant under Saved Chatbots.

Client Name
A unique reference to identify this chatbot client.

JansonsElectric.com

[OpenAI API Key](#)
OpenAI API Key used to create assistant. Click link above to get key.

[Assistant ID](#)
OpenAI assistant_id is created when the assistant is created.

Avatar Style

2.6 Verifying Installation

Once the dashboard loads without errors and displays the configuration panels, your installation is complete. You are now ready to begin creating and managing chatbots.

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3. Overview of the Chatbot Manager Dashboard

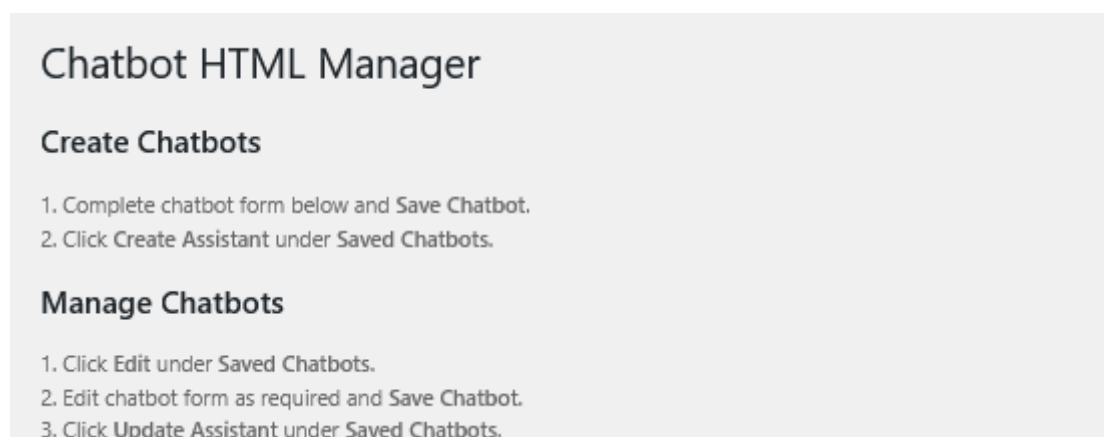
[Watch The Chatbot HTML Manager Overview Video](#)

After installation, you'll find the **Chatbot HTML Manager** interface under:

Settings → **Chatbot HTML Manager** in your WordPress admin panel.

This is where you'll create, configure, and manage all your chatbots.

The dashboard is designed for simplicity and efficiency, giving you complete control from one location.



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Client Name A unique reference to identify this chatbot client.	JansonsElectric.com
OpenAI API Key OpenAI API Key used to create assistant. Click link above to get key.	
Assistant ID OpenAI assistant_id is created when the assistant is created.	
Avatar Style This will display male or female default images for your chatbot.	Female Assistant
Chatbox Title Short title displays in top bar of chatbot box. e.g Welcome to "Jansons Electric Support"	Jansons Electric Support 
Assistant Name Name your chatbot assistant.	Julian
Placeholder Prompt in the user input field. i.e. Ask me about electricals.	Ask me about electricals
Background Color Avatar and chatbox header & button color. Used to match website styling.	<input type="color" value="#0072bc"/>
Text Color For text inside background color.	<input type="color" value="#ffffff"/>
Default Question Starter question button. i.e. How do I request a call out?	How do I request a call out?

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Assistant Knowledge

Instruction Template

Files are read from `/wp-content/plugins/html-chatbot-manager/support/`

— Select a template —

Extended Instructions

(editable)

This is preloaded from `<template>_extended.txt`.
You can edit it here. Placeholders like `*PN*` still work.

Business Name

use placeholder `*BN*`

Healthy Eats Ltd.

Promotion

use placeholder `*PN*`

50% Off All Main Meals This Week

Promotion Link

use placeholder `*PNLUR*`

<https://example.com/promo>

Sales Phone Number

use placeholder `*SAPN*`

0741 577 4054

General Support Number

use placeholder `*SUPN*`

703 878 2716

Contact Form

use placeholder `*CFURL*`

<https://example.com/contact>

Save Chatbot

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Note: Create Assistant or Update Assistant after saving.

 [View Full Assistant Instructions](#)

Training Files

Upload up to 5 files max. 20MB (.txt, .pdf, .json). These will become the assistant's knowledge source.

[Browse...](#) No file selected.

[Upload](#)

No training files uploaded yet.

Note: Update Assistant after uploading or deleting files.

Export/Backup Chatbots (Data-only:No files)

Download a data-only backup of all chatbot settings. API keys are not exported.

[Download Chatbot Backup \(JSON\)](#)

Import/Restore Chatbots (Data-only:No files)

Restore from a JSON backup created by this plugin. API keys and assistant ids are not imported.

Backup JSON file:

[Browse...](#) No file selected.

☐ Overwrite existing chatbots with import if they have the same client name.

Leave unchecked to merge only new chatbot imports (Do not update chatbots listed below).

[Import Chatbot Backup \(JSON\)](#)

Note: Click **Edit** and add API key to restored chatbots after import. Click **Save Chatbot** and **Create Assistant** to finalize.

Saved Chatbots

Note: Click **Copy Embed Code** button and paste the short script just before the `</body>` tag on the webpage(s) you want to display your chatbot.

Client Name	Assistant ID	Status	Actions
Agency Client Finder Support	asst_30UDuVuVvESTHTNTQVE0eV9XG	Up to date (last synced: 2025-10-06 12:09:40)	Copy Embed Code Edit Delete
BrightPathDigital.com	asst_alFNqur4mVcserhBbavqgAua	Up to date (last synced: 2025-10-08 20:36:47)	Copy Embed Code Edit Delete
Agency Client Finder Support Chatbot	asst_yWAnjWBGIIMDOuMQ5gsbmHPoY	Up to date (last synced: 2025-10-08 18:05:59)	Copy Embed Code Edit Delete
FlatleyTreats.com	asst_lhAMN8acMB5cc7gde5Aooq1	Up to date (last synced: 2025-10-10 02:18:53)	Copy Embed Code Edit Delete

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3.1 The Six Key Sections

As shown above the Chatbot Manager dashboard is divided into six primary sections, each serving a specific purpose in the chatbot creation and management process.

1. Create & Manage Chatbots

This section allows you to **create new chatbots or edit existing ones**.

You'll define the chatbot's appearance, name, behaviour, and its connection to your OpenAI assistant.

It's the first step in setting up a new chatbot for a client or project.

2. Assistant Knowledge

This area defines **what your chatbot knows** and how it behaves. You'll choose templates, add or edit instructions, and use placeholders to personalize the chatbot's responses.

3. Training Files

This section lets you **upload reference or training files** that teach your chatbot about specific products, services, or businesses.

Supported file types include `.txt`, `.pdf`, and `.json`.

These files form the assistant's knowledge base.

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4. Export/Backup Chatbots

Use this feature to **export or back up chatbot configurations** (excluding API keys and files).

This ensures you can easily restore settings or duplicate configurations for new projects.

5. Import/Restore Chatbots

This section allows you to **import previously saved configurations**.

You can merge them with existing setups or overwrite older versions to restore a chatbot quickly.

6. Saved Chatbots

This is your **control center** for all chatbots you've created. From here you can:

- View chatbot names and statuses.
- Create or update assistants.
- Upload new training files.
- Copy embed codes for website placement.

3.2 Navigation Tips

- Always **click “Save Chatbot”** after making changes to ensure settings are stored.

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- The **status column** in the “Saved Chatbots” area shows whether a chatbot has been successfully created or requires updating.
- You can return to any section at any time to edit, retrain, or update an assistant.

With the dashboard understood, you’re ready to start **creating and configuring your first chatbot**.

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4. Creating and Configuring a Chatbot

Once the Chatbot Manager plugin is installed and activated, the next step is to create your first chatbot. This process defines how your chatbot looks, behaves, and connects to OpenAI.

[Watch The Chatbot Style & API Video](#)

Client Name A unique reference to identify this chatbot client.	JansonsElectric.com
OpenAI API Key OpenAI API Key used to create assistant. Click link above to get key.	
Assistant ID OpenAI assistant_id is created when the assistant is created.	
Avatar Style This will display male or female default images for your chatbot.	Female Assistant
Chatbox Title Short title displays in top bar of chatbot box. e.g Welcome to "Jansons Electric Support"	Jansons Electric Support 
Assistant Name Name your chatbot assistant.	Julian
Placeholder Prompt in the user input field. i.e. Ask me about electricals.	Ask me about electricals
Background Color Avatar and chatbox header & button color. Used to match website styling.	<input type="color" value="#0072bc"/>
Text Color For text inside background color.	<input type="color" value="#ffffff"/>
Default Question Starter question button. i.e. How do I request a call out?	How do I request a call out?

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4.1 Adding a New Chatbot

1. In your WordPress dashboard, navigate to **Settings** → **Chatbot HTML Manager**.
2. Locate the section **shown above**.
3. Fill out each of the fields as described below.
4. Click **Save Chatbot** when complete.
5. The chatbot will appear in the **Saved Chatbots** list at the bottom of the page.

Tip: Use a unique reference name for each chatbot (e.g., the client's domain name).

4.2 Completing Basic Chatbot Fields

Each chatbot has several settings that control how it connects to OpenAI and how it appears on the front end.

Client Name

A unique identifier for the chatbot client.

Example: `billsplumbing.com` or `Jansons Electric`.

OpenAI API Key

Enter your OpenAI API key here.

This key connects your chatbot to the OpenAI platform.

API keys can be created from your OpenAI account under **View API Keys**.

Tip: Use a separate API key for each client project so you can track usage and billing individually.

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OpenAI Assistant ID

This is not required during creation.

The Assistant ID is **automatically generated** when you create the assistant later.

Chatbot Avatar

Choose an avatar image to represent your assistant.

This appears in the chatbot window and can be customized per client.

Chatbox Title

This title displays at the top of the chatbot window.

Example: "Welcome to Jansons Electric Support".

Assistant Name

Give your assistant a friendly, personal name.

Example: "Julian", "Jenny", or "Alex".

Placeholder Text

This appears inside the chatbot's input box.

Example: "Ask your question here..."

Chatbox Background Color

Choose a background color that complements the website's style.

Chatbox Text Color

Select a text color that contrasts well with the background for readability.

Default Question

This is the predefined question or message that can appear as a

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clickable button or pop-up prompt.

It's ideal for drawing attention to promotions or main services.

Example:

“See our 50% off boiler service offer this week only!”

or

“Let me help you with your enquiry.”

When clicked, this button initiates a guided conversation based on your assistant's instructions.

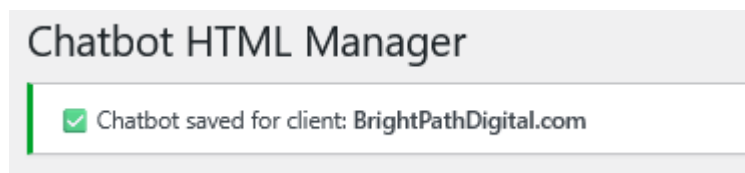
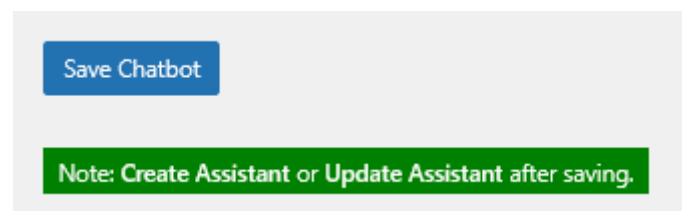
Client Name A unique reference to identify this chatbot client.	BrightPathDigital.com
OpenAI API Key OpenAI API Key used to create assistant. Click link above to get key.	sk-proj-OMSyGMhr37hhA7SVVkdM-S8SW4XA48J3NF
Assistant ID OpenAI assistant_id is created when the assistant is created.	asst_alFNquR4mVcserhBbavqqAua
Avatar Style This will display male or female default images for your chatbot.	Male Assistant
Chatbox Title Short title displays in top bar of chatbot box. e.g Welcome to "Jansons Electric Support"	BrightPath Support
Assistant Name Name your chatbot assistant.	Richie
Placeholder Prompt in the user input field. i.e. Ask me about electricals.	Ask me about our digital services
Background Color Avatar and chatbox header & button color. Used to match website styling.	<input type="color" value="#0070C0"/>
Text Color For text inside background color.	<input type="color" value="#FFFFFF"/>
Default Question Starter question button. i.e. How do I request a call out?	How do I claim my free website assessment

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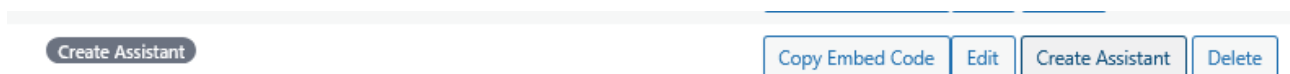
4.3 Editing Existing Chatbots

If you are editing an existing chatbot then go to the same section to make your changes make changes:

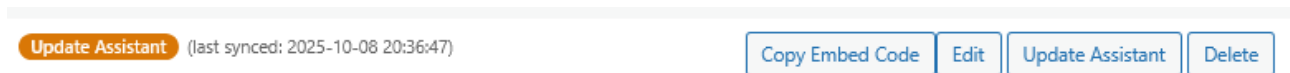
1. Go to **Saved Chatbots**.
2. Click **Edit** next to the chatbot you wish to modify.
3. Adjust any settings as required.
4. Click **Save Chatbot**.



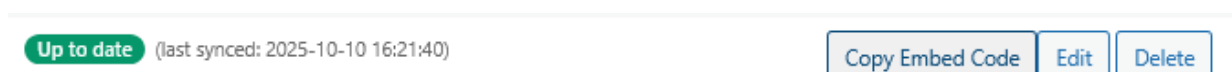
If creating chatbot you will see this:



If updating you will see this:



5. Then **Create** or **Update Assistant** to sync changes with OpenAI.



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5. Configuring Assistant Knowledge

Once your chatbot's basic details are complete, the next step is to configure its **Assistant Knowledge**.

[Watch The Assistant Core Knowledge & Behaviour Video](#)

This section defines how your chatbot behaves, the tone it uses, and what it knows about your business or client. You'll use templates, editable instruction fields, and placeholders to personalise each assistant's responses.

Assistant Knowledge

Instruction Template
Files are read from `/wp-content/plugins/html-chatbot-manager/support/`

— Select a template —

Extended Instructions (editable)
This is preloaded from `<template>_extended.txt`.
You can edit it here. Placeholders like `*PN*` still work.

Business Name
use placeholder `*BN*`

Healthy Eats Ltd.

Promotion
use placeholder `*PN*`

50% Off All Main Meals This Week

Promotion Link
use placeholder `*PNLUR*`

https://example.com/promo

Sales Phone Number
use placeholder `*SAPN*`

0741 577 4054

General Support Number
use placeholder `*SUPN*`

703 878 2716

Contact Form
use placeholder `*CFURL*`

https://example.com/contact

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5.1 Understanding Instruction Templates

Instruction templates are pre-written frameworks that provide your chatbot with a core set of rules and behaviours.

They determine how the chatbot communicates, handles customer enquiries, and presents offers or promotions.

When you create or edit a chatbot, you'll find these templates in the **Instruction Template** dropdown list.

They provide a solid foundation that you can then customise for each client or project.

Common Templates Include

- **[48 Hour Agency] Sales & Support Agent** – Designed for sales or customer support bots that promote services or handle product questions. Specifically the one for **48 Hour AI Agency**.
- **Assistant Knowledge (Placeholder Only)** – A general-purpose template you can adapt for any kind of chatbot.

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Assistant Knowledge

Instruction Template

Files are read from `/wp-content/plugins/html-chatbot-manager/support/`

Extended Instructions (editable)

This is preloaded from `<template>_extended.txt`. You can edit it here. Placeholders like `*PN*` still work.

Business Name

use placeholder `*BN*`

ecommerce_helper.txt

— Select a template —

assistant_knowledge_placeholder_only.txt

booking_reception.txt

ecommerce_helper.txt

knowledge_base_mixed.txt

lead_qualifier.txt

product_advisor.txt

restaurant_host.txt

sales_only.txt

sales_support.txt

support_only.txt

[48 hour Agency] sales_and_support_agent_instructions.txt

Flatley Treats

5.2 Editing Extended Instructions

When a template is selected, the **Extended Instructions** box automatically fills with predefined text. You can freely edit this text to make your chatbot more specific to your client's business, website, and tone of communication.

This area often includes behaviour rules, tone of voice, response examples, and fallback replies.

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By customising this content, you can make your chatbot sound professional, helpful, and aligned with your brand.

Example of editable instructions:

Service Notes

- Mention today's ***PN*** when guests ask about specials; include ***PNLURL*** if useful.
- If unsure about allergens or cross-contamination, advise calling ***SUPN***.
- For groups >8, route to ***CFURL*** with name, phone, date/time, party size, and any dietary needs.

Extended Instructions (editable)

This is preloaded from `<template>_extended.txt`. You can edit it here. Placeholders like `*PN*` still work.

Business / Website Specific Guidance

- Promote the current special offer: `*PN*`.
- Encourage the visitor to try the free website assessment: `*PNLURL*` or email: `info@brightpathdigital.com` or phone: `*SAPN*`.
- Explain how finding and fixing website issue can lead to more leads, more customers and more sales and income. Focus on benefits
- Ensure they know that the website assessment comes with no strings attached.
- Website assessment may include the following:

1. Technical Performance

Page speed & load time (`GTmetrix` / `PageSpeed Insights`)

Mobile responsiveness (how it looks and works on different screen sizes)

Browser compatibility (Chrome, Safari, Firefox, Edge)

Core Web Vitals (`LCP`, `FID`, `CLS`)

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5.3 Using Placeholders

The Chatbot Manager supports placeholders that automatically insert your client's business details into the chatbot's instructions and replies.

This keeps your configuration flexible and reusable while maintaining accuracy and personalisation.

Below are the available placeholders and their meanings:

Placeholder	Description	Example Entry
BN	Business Name	Jansons Electric
PN	Promotion	50% off boiler services this month only
PNLUR	Promotion Link	https://jansons-electric.com/offers
SAPN	Sales Phone Number	01632 123456
SUPN	Support Phone Number	01632 654321
CFURL	Contact Form URL	https://jansons-electric.com/contact-us

When the chatbot is saved, these placeholders are automatically replaced with the information you've entered in the Assistant Knowledge section.

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5.4 Customising Behaviour

You can use placeholders strategically to fine-tune the chatbot's responses.

For example:

- If a customer asks about pricing or quotes, the chatbot can reference `*SAPN*` (the sales phone number).
- For support or delivery issues, it can direct users to `*SUPN*` or the `*CFURL*`.
- If promotions are active, the chatbot can mention `*PN*` and link to `*PNLUR*` for more details.

By combining templates, instructions, and placeholders, you can create chatbots that are both intelligent and tailored to your clients' goals.

5.5 Saving and Applying Knowledge Settings

After editing your assistant's knowledge and filling in the required fields:

1. Click **Save Chatbot** to store your changes.
2. Scroll down to the **Saved Chatbots** section.
3. If the chatbot hasn't been created yet, click **Create Assistant**.
4. If it already exists, click **Update Assistant** to sync your changes with OpenAI.

The chatbot's new knowledge and behaviour will be applied automatically once synced.

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Save Chatbot

Note: Create Assistant or Update Assistant after saving.

Update Assistant (last synced: 2025-10-10 16:21:40)

Copy Embed Code

Edit

Update Assistant

Delete

When your assistant's knowledge is configured, the next step is to **add and upload training files** so the chatbot can reference detailed business information and website content.

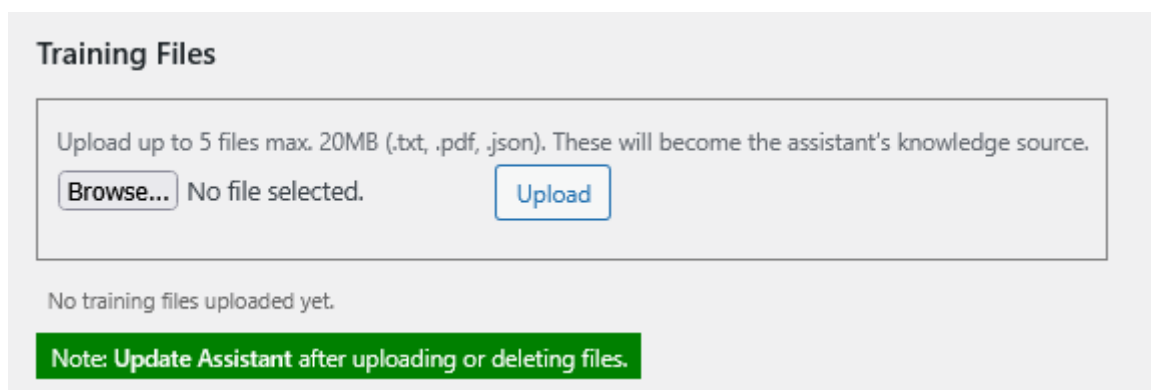
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6. Creating and Uploading Training Files

Training files provide your chatbot with the specific knowledge it needs about your client's business, products, and services. They help the assistant deliver accurate, detailed, and on-brand responses.

[Watch The Assistant Training & Knowledge Files Video](#)

Each assistant can have up to **five training files** uploaded. These can include product descriptions, service pages, FAQs, or exported website content.



The screenshot shows a 'Training Files' section with a text box containing the instruction: 'Upload up to 5 files max. 20MB (.txt, .pdf, .json). These will become the assistant's knowledge source.' Below this text box are two buttons: 'Browse...' and 'Upload'. The 'Browse...' button is disabled, and the text 'No file selected.' is displayed next to it. Below the buttons, it says 'No training files uploaded yet.' At the bottom, there is a green box with white text that reads: 'Note: Update Assistant after uploading or deleting files.'

6.1 About Training Files

Training files are the information sources your assistant will use to answer questions and generate responses. They should be concise, relevant, and formatted clearly so the AI can easily understand and use the information.

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Recommended file types include:

- `.txt` (plain text)
- `.pdf`
- `.json` (useful for structured data from websites)

Tip: Each uploaded file automatically becomes part of the assistant's knowledge base and is indexed for search when the assistant is updated.

6.2 What to Include in Training Files

Training files should include all key information your chatbot might need to support users.

Typical examples include:

- **Website Text Pages:** About, Contact, Homepage, Services, and Product pages.
- **Product or Service Catalogues:** Detailed descriptions, pricing, and features.
- **Promotional Details:** Special offers or campaigns being promoted.
- **FAQ and Support Information:** Common customer questions and answers.
- **Terms, Conditions, or Policies:** Delivery details, refunds, warranties, etc.
- **Opening Hours and Contact Details:** Business address, phone numbers, or service coverage areas.

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6.3 Preparing Website Content for Training

If the client already has a website, you can export or copy content directly from it.

1. Visit the client's website and copy the text from relevant pages.
2. Paste the content into a text editor such as Notepad or Word.
3. Remove unnecessary formatting, menus, or unrelated content.
4. Save the file with a clear name such as `yourwebsite-assistant-data.txt`.

Pro Tip: Paste the content into ChatGPT and ask it to “tidy up the text to create a suitable training file for my OpenAI assistant.”

This will clean and optimise the content automatically.

6.4 Uploading Training Files

To upload your prepared files:

1. In the **Chatbot HTML Manager**, open the **Training Files** section.
2. Click **Browse** and select your file.
3. Click **Upload** to add it to the chatbot's configuration.
4. Repeat this process for each file (maximum of five).

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Supported file types: .txt, .pdf, .json

Maximum file size: **20 MB per file**

Training Files

Upload up to 5 files max. 20MB (.txt, .pdf, .json). These will become the assistant's knowledge source.

No file selected.

website-text-and-information.txt	(21.1 KB)	text/plain	local-only-update-assistant	Delete
service-offerings.txt	(0.8 KB)	text/plain	local-only-update-assistant	Delete
free-website-assesment-guide.txt	(3.1 KB)	text/plain	local-only-update-assistant	Delete
contact-numbers-urls.txt	(0.1 KB)	text/plain	local-only-update-assistant	Delete

Note: Update Assistant after uploading or deleting files.

6.5 Updating the Assistant

After uploading your files, they'll appear as **local only** until you sync them with your assistant.

1. Scroll down to the **Saved Chatbots** section.
2. Find your chatbot and click **Update Assistant**.
3. Wait for the status to change from *local only* to *indexed and up to date*.

Once complete, the assistant will have access to all uploaded documents for reference during chats.

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Training Files

Upload up to 5 files max. 20MB (.txt, .pdf, .json). These will become the assistant's knowledge source.

[Browse...](#)

No file selected.

[Upload](#)

website-text-and-information.txt	(21.1 KB)	text/plain	indexed	Delete
service-offerings.txt	(0.8 KB)	text/plain	indexed	Delete
free-website-assesment-guide.txt	(3.1 KB)	text/plain	indexed	Delete
contact-numbers-urls.txt	(0.1 KB)	text/plain	indexed	Delete

Note: Update Assistant after uploading or deleting files.

Up to date (last synced: 2025-10-10 17:02:34)

[Copy Embed Code](#)

[Edit](#)

[Delete](#)

6.6 Adding Additional Contact Points

You can include extra support numbers or contact details within your training files by adding them in this format:

Delivery Support Line: 0752 1233445: For unresolved delivery enquiries.

The chatbot can reference these when necessary, directing users to the correct contact method if it cannot resolve their issue directly.

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6.7 Verifying Training File Integration

Once your assistant has been updated, test it by embedding on a test webpage and asking a few questions related to your uploaded material.

If it responds accurately, your training files have been successfully integrated.

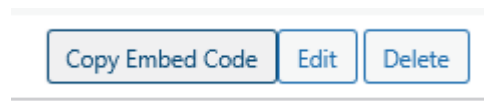
At this stage, your chatbot is fully trained and ready to be embedded onto a live website.

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7. Embedding the Chatbot on a Website

Once your chatbot has been configured and its training files uploaded, the final step is to make it live on your client's website. The Chatbot HTML Manager plugin generates a simple HTML script that you can copy and paste into any web page — allowing the chatbot to appear instantly.

[Watch The Embedding Chatbot On Your Website Video](#)



7.1 Accessing the Embed Code

1. Open the **Chatbot HTML Manager** dashboard.
2. Scroll to the **Saved Chatbots** section.
3. Locate the chatbot you wish to publish.
4. Click **Copy Embed Code**.

This will copy a short HTML script to your clipboard, ready to be pasted into a website.

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Example Embed Code:

```
<script src="https://yourdomain.com/wp-content/plugins/html-chatbot-manager/assets/chatbot-loader.js" data-client="Bills Plumbing Sales 2057"></script>
```

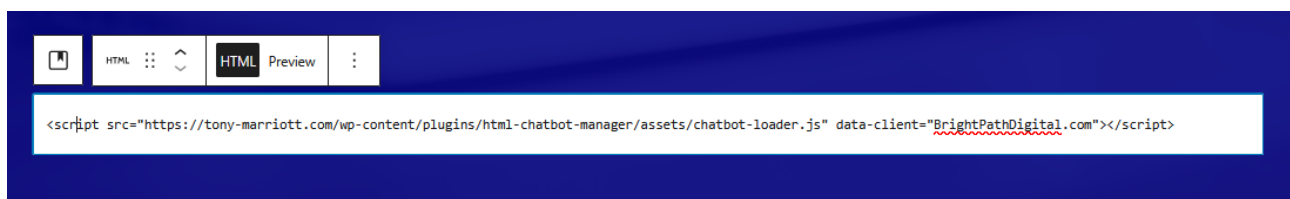
Each chatbot has a unique `data-client` value, ensuring that the correct assistant loads for the corresponding client.

7.2 Where to Place the Code

The embed code can be added to **any page** on the client's website. For best results:

- Paste the code just before the closing `</body>` tag in the HTML.
- Alternatively, it can be inserted anywhere inside the `<body>` section.
- The chatbot will automatically appear in the **bottom right corner** of the page once active.

Example using WordPress Block Editor (Custom HTML code) added to end of the page.



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Example added to raw html page.

Embed code added right before the </body> tag.

Seen below in red.

```
<!DOCTYPE html> <html lang="en-US">
<head>
...
</head>
<body>
...
  var observer = new MutationObserver(function(mutations) {
    mutations.forEach(function(mutation) {
      if (mutation.type == 'attributes') {
        theme = html.getAttribute('data-neve-theme');
        setCurrentTheme(theme);
      }
    });
  });
  observer.observe(html, {
    attributes: true
  });
</script>
<script src="https://tony-marriott.com/wp-
content/plugins/html-chatbot-manager/assets/chatbot-
loader.js" data-client="BrightPathDigital.com"></script>
</body>
</html>
```

Using the above you can add a chatbot to any webpage.

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7.3 Testing the Embedded Chatbot

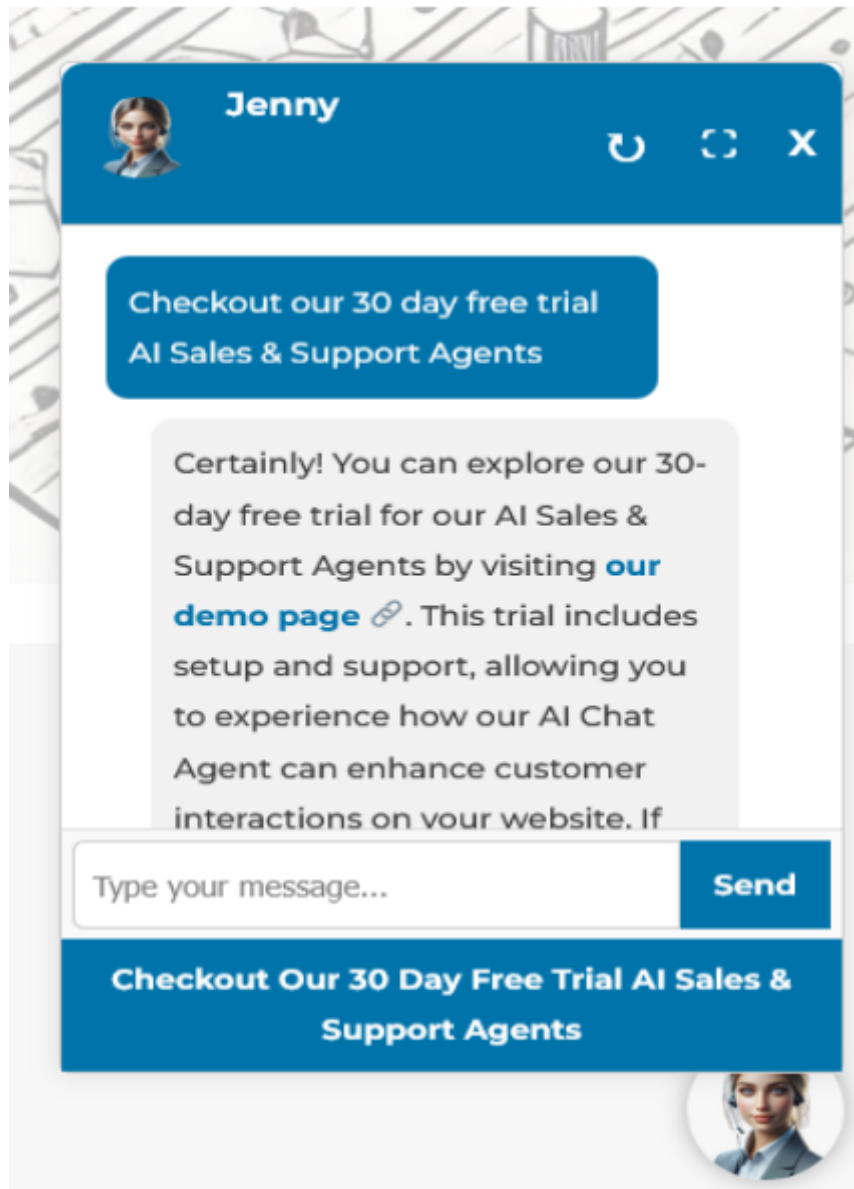
After embedding the code:

- 1.Refresh the webpage where the script was added.
- 2.The chatbot's avatar should appear in the bottom right corner.
- 3.Click the avatar to open the chat window and test a few interactions.

If it doesn't appear, verify that:

- The plugin is active and configured correctly.
- The Assistant ID and API Key are valid.
- No caching plugin is preventing the script from loading.

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7.4 Multiple Chatbots on Different Sites

You can embed different chatbots on different websites simply by copying the specific embed code for each one.

Each chatbot maintains its own independent data, personality, and

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training files — ideal for agencies managing multiple clients.

7.5 Removing or Disabling a Chatbot

If you need to remove a chatbot from a website:

- Simply delete the embed code from the web page.
- Alternatively, you can disable or delete the chatbot directly from the Chatbot Manager dashboard.

This allows full **remote control** without needing access to your client's hosting or website backend.



Once your embed code is added and tested, the chatbot is fully live and ready to interact with visitors.

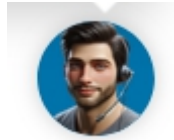
Next, we'll explore how the chatbot appears on the website and how users can interact with it.

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8. Using the Chatbot on Your Website

After embedding the chatbot on your site, it becomes an interactive, AI-powered assistant ready to greet visitors, answer questions, and guide them through promotions or services.

This section explains how the chatbot appears, how users interact with it, and what a typical conversation looks like.

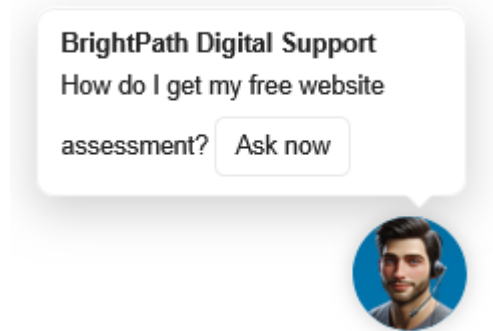


8.1 How the Chatbot Appears

By default, the chatbot remains **minimized** and displays only the assistant's avatar in the **bottom-right corner** of the webpage.

If the visitor does not open the chatbot after a short time, it will display a **prompt message** to encourage interaction — for example, a small pop-up bubble saying *“Need help?”* or *“Ask me about today’s offer!”*

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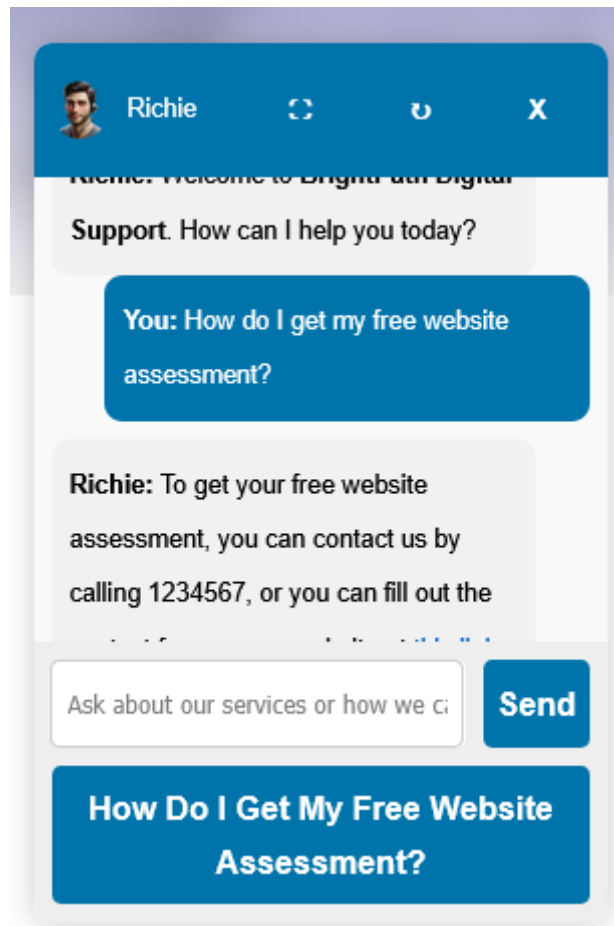
When a visitor clicks the avatar:

- The chatbot window expands.
- A welcome message or introductory text appears.
- The visitor can then type their question or select the predefined default question prompt to begin chatting.

When a visitor clicks the speech bubble prompt:

- The chatbot window expands.
- The speech prompt is entered directly into the chatbox and run automatically.
- The chatbot will respond and the visitor can then type their question or response to begin chatting.

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8.2 User Interaction with the Chatbot

Visitors can type directly into the chat input box and press **Send** to ask their questions.

The chatbot responds using the knowledge and training you've configured.

Each chatbot can handle:

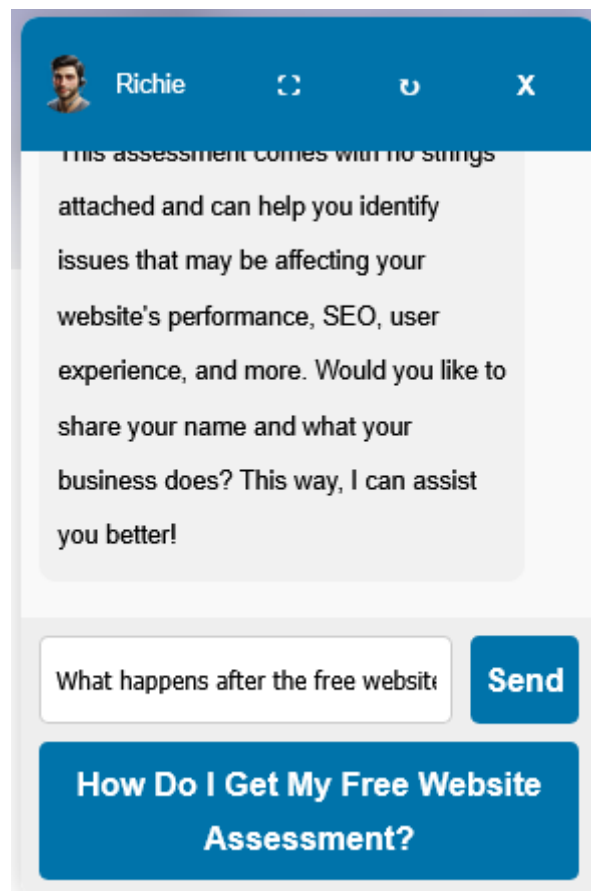
- Business-related enquiries (sales, support, product info).

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- FAQs and delivery questions.
- Lead generation conversations, including capturing names, emails, or phone numbers.
- Promotional and special offer discussions using placeholders like *PN* and *PNLUR*.

If you've defined a **default question**, it will appear as a clickable button under the chatbot window.

Clicking this button starts a guided conversation, designed to lead the visitor through a specific process — such as booking a service, requesting a quote, or checking eligibility for an offer.



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8.3 Example Interaction

Below is an example of how a user might interact with a chatbot on a client website:

Visitor:

Hi, I'd like to know if you offer emergency plumbing services.

Chatbot:

Hi, I'm Jason, your support assistant. Yes, we provide 24-hour emergency plumbing. Would you like me to connect you to our service line?

Visitor:

Yes, please.

Chatbot:

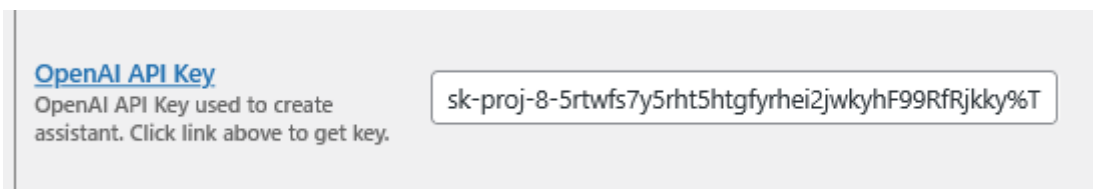
*You can reach our emergency team anytime at 01632 999111 or through our online contact form here:
<https://billsplumbing.com/contact>*

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9. Security and Best Practices

Maintaining strong security and following best practices ensures that your chatbot functions reliably, protects data, and provides a professional experience for clients and users.

This section covers how to keep your API keys safe, control assistant behaviour, and ensure data privacy.



9.1 Protecting Your OpenAI API Key

Your OpenAI API key is the link between your website and the OpenAI platform.

The Chatbot HTML Manager plugin handles it securely by:

- Storing the key in the WordPress database (not in public code).
- Using **server-side requests** to communicate with OpenAI, ensuring the key is never exposed in front-end HTML or JavaScript.

Best Practice Tips

- Do not share your API key with clients or third parties.
- Use a **different key per project or client** to track usage

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separately.

- Rotate or regenerate keys periodically for extra security.

9.2 Restricting Assistant Responses

To prevent misuse or off-topic conversations, limit your assistant's responses to relevant business areas only.

You can do this through well-structured **System Instructions** (**Extended Instructions** Text Box) and **Training Files** that focus on specific content.

If a user asks unrelated or inappropriate questions, the assistant should respond with a polite, neutral message such as:

“Sorry, I can’t help with that.”

This helps keep the chatbot on-topic and prevents confusion or accidental misuse of AI capabilities.

E.g.

- 1. Act as a sales assistant and support agent for the business.*
- 2. Answer questions using the previously uploaded training files; you may use general AI knowledge only to clarify or verify.*
- 3. If a question is unrelated to this business or its products/services, reply:*

“Sorry, I don't have that information. Can I tell you more about our current special offer?”

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9.3 Limiting Data Exposure

When training your chatbot, include only information that's appropriate for public access.

Avoid uploading sensitive, confidential, or private data to OpenAI.

Recommended Practices

- Select only relevant pages and documents for training (About, Services, FAQ, etc.).
- Do not include customer records, payment information, or personal data.
- Review and update training files regularly to ensure accuracy and compliance.

9.4 Regularly Updating the Plugin

Keeping your Chatbot HTML Manager plugin updated is essential for maintaining compatibility with the latest versions of WordPress and OpenAI.

Check your **plugin download page** for updates regularly. Updates may include:

- Security patches
- Performance enhancements
- New features and model integrations

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Always back up your chatbot configurations before updating the plugin.

9.5 Monitoring Usage and Performance

To ensure smooth operation:

- Monitor your OpenAI account for API usage and cost trends.
- Test chatbots regularly to confirm accuracy and relevance.
- Update training files when client services, prices, or policies change.

By following these best practices, your chatbots will remain secure, efficient, and aligned with each client's objectives.

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10. Troubleshooting and Maintenance

Even with proper setup, you may occasionally encounter minor issues or need to make adjustments to your chatbot configuration. This section covers common problems, how to resolve them, and tips for ongoing maintenance.

Assistant Knowledge

Instruction Template
Files are read from `/wp-content/plugins/html-chatbot-manager/support/`

assistant_knowledge_placeholder_only.txt

▼

Extended Instructions (editable)
This is preloaded from `<template>_extended.txt`. You can edit it here. Placeholders like `*PN*` still work.

training files; you may use general AI knowledge only to clarify or verify.
3. If a question is unrelated to this business or its products/services, reply:
 "Sorry, I don't have that information. Can I tell you more about our current special offer?"
4. If the visitor asks to speak to a human or needs help beyond your scope, give them the sales or support phone numbers.
5. Always ask the visitor's name and what their business does to personalize the conversation.

///

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10.1 Common Issues and Fixes

Chatbot Not Appearing on the Website

Possible Causes

- The embed code wasn't placed correctly within the website's HTML.
- The plugin is inactive or deactivated.
- Caching or security plugins are blocking the chatbot script.

Fix

- Ensure the embed code is placed inside the `<body>` section of the webpage, preferably before the closing `</body>` tag.
- Check that the Chatbot HTML Manager plugin is active.
- Clear the website cache and browser cache, then refresh the page.

Chatbot Appears But Doesn't Respond

Possible Causes

- Invalid or expired OpenAI API key.
- The assistant hasn't been synced after uploading new training files.
- Internet connectivity issues between the WordPress site and

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OpenAI's servers.

- Chats are limited to 30 minute sessions and will expire automatically.

Fix

- Verify your API key under the Chatbot Manager settings.
- Re-click **Update Assistant** in the Saved Chatbots section to refresh its configuration.
- Test with a known working assistant to rule out external issues.
- Click the **New Chat** button  at the top of the chatbox.

Training Files Not Recognized

Possible Causes

- File size exceeds 20MB limit.
- Unsupported file format.
- Upload interrupted before completion.

Fix

- Ensure files are `.txt`, `.pdf`, or `.json`.
- Re-upload smaller versions of the files.
- Check that your assistant status shows “indexed and up to date” after syncing.

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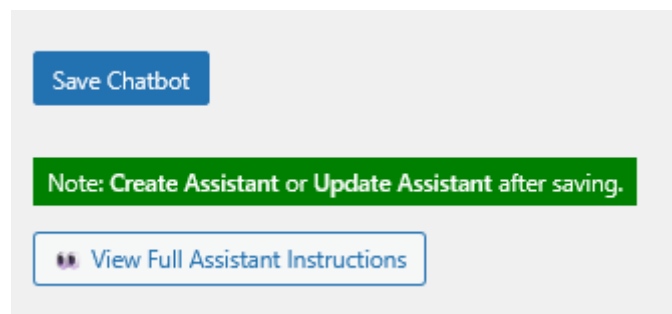
Chatbot Responds Incorrectly

Possible Causes

- The training data contains inconsistent or irrelevant information.
- The assistant has not been retrained after updating files.
- The placeholder fields were not updated correctly.

Fix

- Review your uploaded files for accuracy and clarity.
- Update placeholders in the Assistant Knowledge section.
- Click **Update Assistant** to resync the new information.
- Click **View Full Assistant Instructions** to see the combined template plus extended template to check for any instruction issues.



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10.2 Best Practices for Ongoing Maintenance

To ensure your chatbots remain accurate and efficient:

- Review each chatbot's performance monthly.
- Update training files whenever products, pricing, or services change.
- Periodically test the chatbot's responses to verify accuracy.
- Remove outdated promotional details and replace them with current offers.
- Maintain consistent backups using the **Export/Backup Chatbots** function.

Export/Backup Chatbots (Data-only:No files)

Download a data-only backup of all chatbot settings. API keys are not exported.

[Download Chatbot Backup \(JSON\)](#)

Import/Restore Chatbots (Data-only:No files)

Restore from a JSON backup created by this plugin. API keys and assistant ids are not imported.

Backup JSON file:

[Browse...](#) No file selected.

☐ Overwrite existing chatbots with import if they have the same client name.

Leave unchecked to merge only new chatbot imports (Do not update chatbots listed below).

[Import Chatbot Backup \(JSON\)](#)

Note: Click **Edit** and add API key to restored chatbots after import. Click **Save Chatbot** and **Create Assistant** to finalize.

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*IMPORTANT NOTE: The actual training files and the OpenAI API key is not exported in a backup file. After restoring you will need to add a new (or the same) API Key and upload the training files. Not forgetting to **Update Assistant**. So when creating chatbots ensure you keep the original training files in a safe and accessible location.*

*Also note that you can restore to a blank or fresh Chatbot Manager (no existing chatbots in the list) or overwrite the existing chatbots. So you may need to **Create Assistant** or **Update Assistant** as required.*

10.3 Updating or Regenerating Chatbots

If you've made major structural changes (e.g., new branding or product lines), it's often best to **retrain or regenerate** the chatbot:

1. Edit your Assistant Knowledge instructions to reflect new goals.
2. Update training files with fresh website or product data.
3. Click **Update Assistant** or recreate the assistant entirely using **Create Assistant**.

This ensures your chatbot remains relevant and high-performing.

10.4 Contact and Support

If persistent issues occur that you cannot resolve, visit the official plugin page or contact support:

<https://tonymarriott.info/>

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11. Conclusion

You've now learned how to install, configure, and deploy fully functional AI-powered chatbots using the **Chatbot HTML Manager** plugin.

With this system, you can create professional, intelligent assistants that engage visitors, promote services, and provide instant customer support — all managed from one simple interface.



11.1 Key Takeaways

- The Chatbot HTML Manager enables you to build, train, and manage multiple AI chatbots from within WordPress.
- Each chatbot connects to an **OpenAI Assistant**, giving it powerful natural language understanding and adaptive responses.
- You can train assistants on your own files, website content, and client data for highly tailored, industry-specific interactions.
- The system supports **remote management**, letting you update, disable, or redeploy chatbots across multiple client

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sites instantly.

- Built-in templates and placeholders make it easy to customize tone, branding, and promotional content for each assistant.

By following the steps in this guide, you can provide a professional AI chatbot service to your clients — one that enhances lead generation, improves customer satisfaction, and modernizes website engagement.

11.2 Expanding Your Chatbot Network

Once you're comfortable creating individual assistants, consider building a **portfolio of chatbot services**.

You can offer these across industries such as:

- Real estate and property management
- Local trades and home services
- E-commerce and product support
- Education and online coaching
- Healthcare and appointment scheduling



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Each chatbot can be branded, trained, and priced according to client needs, creating recurring revenue streams for your business.

11.3 Staying Up to Date

AI technology and the OpenAI platform evolve quickly. To ensure your chatbots continue performing at their best:

- Keep your plugin updated to the latest version.
- Watch for new OpenAI model releases and improvements.
- Periodically retrain assistants with fresh, relevant data.
- Follow future documentation and updates at <https://tonymarriott.info/>

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Appendix

The appendix provides ready-to-use examples and reference materials to help you create, customize, and manage your assistants more efficiently.



A.1 Example System Extended Instruction Template

Below is a sample **Extended Instruction Template** you can copy, edit, and paste into the Extended Instructions text box when creating new assistants in the **Chatbot HTML Manager**.

Assistant Purpose

You are a friendly, professional AI assistant representing *BN*.

Your main goal is to assist visitors by answering product or service questions, guiding them toward relevant pages, and encouraging conversions.

Behaviour Guidelines

- Always greet visitors politely and maintain a helpful tone.**
- When asked about current promotions, mention *PN* and**

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provide a link to ***PNLUR***.

- For product or service inquiries, reference uploaded training files first.
- If unsure, advise users to contact the business directly via ***CFURL***.
- Never make up information or give personal opinions.

Contact References

- Sales Line: ***SAPN***
- Support Line: ***SUPN***
- Contact Form: ***CFURL***

Example Interaction

Visitor: “Do you have any offers at the moment?”

Assistant: “Yes! Right now ***BN*** is offering ***PN***. You can learn more or sign up here: ***PNLUR***.”

Extended Instructions

(editable)

This is preloaded from

`<template>_extended.txt` .

You can edit it here. Placeholders like ***PN*** still work.

##You are a Product and Services Sales & Support Agent.

1. Act as a sales assistant and support agent for the business.
2. Answer questions using the previously uploaded training files; you may use general AI knowledge only to clarify or verify.
3. If a question is unrelated to this business or its products/services, reply:
“Sorry, I don't have that information. Can I tell you more about our current special offer?”
4. If the visitor asks to speak to a human or

A.2 Example Training File Format

Training files should be clear, concise, and factual.

Here's an example of how to structure a `.txt` file for upload:

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Company Name: Jansons Electric
Website: <https://jansons-electric.com>

About Us:

Jansons Electric provides residential and commercial electrical services across the Midlands. Our specialties include rewiring, safety inspections, and emergency call-outs.

Services:

- Electrical installations**
- Fault finding and repairs**
- Lighting design**
- 24-hour emergency response**

Promotions:

This month only — 50% off all electrical safety inspections. Contact us today to schedule your appointment!

Contact:

Phone: 01632 123456
Email: info@jansons-electric.com
Address: 21 Market Road, Nottingham

Recommended File Tips

- Use plain text whenever possible for easy parsing.
- Keep paragraphs short and well-structured.
- Avoid unnecessary formatting or special characters.
- Use one file per major topic if possible (e.g., “Products.txt”, “FAQ.txt”, “AboutUs.txt”).

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- If you need to combine ensure clear headings to identify different topics.

Example Training File Derived From Client Website Pages

BrightPath Digital — Knowledge Base

company: BrightPath Digital

tagline: Your partner in business success.

focus: Local SMB growth via PPC, content, SEO, websites, GBP, and AI-driven marketing.

target_clients: Small and medium-sized local businesses

locations:

- 2982 Sun Valley Road, Washington

contact:

phone: "509-728-8632"

hours: "Mon–Fri"

email: "info@brightpathdigital.com"

primary_ctas:

- Free Assessment
- Free Consultation

pillars:

- Tailored strategies
- Collaborative partnership
- Innovation backed by results

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mission: Empower local businesses with innovative, results-driven digital strategies.

vision: A world where SMBs have the tools and strategies to compete and excel online.

Elevator Pitch

BrightPath Digital helps local businesses grow customers, increase visibility, and drive measurable results. We combine tailored strategies, open collaboration, and innovative, data-driven tactics to build durable growth.

Core Services (One-liners)

Pay-Per-Click (PPC): Google, Facebook, and other platforms; conversion-focused campaigns.

Video Marketing: Creation and distribution of video content that informs and converts.

Content Creation: Web copy, social posts, and downloadable assets (giveaways/paid products).

AI for Business: Practical AI workflows to improve marketing performance and operations.

On-Page SEO: Authoritative content and technical improvements to boost visibility and performance.

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Link Building: High-quality backlink acquisition to strengthen authority.

Google Business Profile (GBP): Claiming, verification, optimization, posts, and updates.

Citations (NAP): Internet-wide Name/Address/Phone consistency management.

Accessibility: Improvements to make websites usable for all audiences.

Reputation Management: Proactive reviews strategy to increase ratings and trust.

Custom Website Design: Responsive, SEO-ready sites, landing pages, forms, and special features.

Online Security: Protection against hacks and malicious activity.

What We Do Best for Local Businesses

Increase local search visibility (Maps + organic)

Generate qualified leads through PPC and content funnels

Build trust via reviews, consistent NAP data, and strong branding

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Deliver measurable outcomes with transparent reporting

How It Works (Process)

Discover & Quote — Understand goals, challenges, and timelines; provide a personalized, no-obligation quote.

Strategize & Execute — Craft an SEO-informed, channel-specific plan; launch and manage campaigns.

Grow & Succeed — Optimize continuously; report outcomes; scale what works.

Proof & Testimonials

“We saw a significant increase in website traffic and sales within just a few months.” — Ashid Marma

“BrightPath Digital completely transformed our strategy... thrilled with the results.” — Allison Marken

“Guided us while letting us keep full control—exactly what we needed.” — Jason Greenway

Why Choose BrightPath Digital?

No one-size-fits-all: Every strategy is tailored to your goals and market.

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Collaborative: You stay informed and in control.

Results-Driven: Creative ideas + data = measurable impact.

Detailed Service Notes

Content Creation

Deliverables:

Giveaway & paid products (eBooks, guides)

SEO-optimized website copy

Platform-specific social content

Outcome: Brand voice clarity, better engagement, and conversion-ready assets.

Google Business Profile (GBP)

Actions: Claim/verify, categories, descriptions, photos, accurate hours/services, posts/updates, Q&A, review strategy.

Outcome: Higher local ranking, more map views, and better conversions from local customers.

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Custom Website Design

Features:

Bespoke design, responsive builds

SEO foundations (structure, speed, metadata)

UX best practices & clear CTAs

Integrations (e-commerce, bookings, forms)

Outcome: A fast, on-brand site that converts and scales.

Team (Public Profiles)

James Adkins — Owner & Digital Strategist

Jane Marshall — Service Manager

Helen Castillo — Social Manager

Note: Social links available on request (Facebook, Twitter, LinkedIn).

FAQs (Ready-to-Use)

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Q: What industries do you serve?

A: Primarily small and medium-sized local businesses across services, retail, and professional sectors.

Q: How soon will we see results?

A: PPC and GBP optimizations can yield early wins in weeks; SEO and content typically compound over 3–6 months.

Q: Do you lock clients into long contracts?

A: No long mandatory lock-ins; we prefer performance-driven, transparent engagements.

Q: What do you need to get started?

A: Goals, budget range, access to relevant accounts (website, Google, ad platforms), and brand assets.

Q: How do you report performance?

A: Clear, periodic reporting focused on KPIs (leads, calls, conversions, revenue proxies), plus recommended next steps.

Compliance & Accessibility

We prioritize accessibility improvements to ensure sites are usable by all visitors and compliant with best practices.

Calls to Action (Use These)

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“Book a Free Consultation to review opportunities and get a tailored plan.”

“Request a Free Assessment to identify quick wins in SEO, PPC, and GBP.”

Contact

Phone: 509-728-8632 (Mon–Fri)

Email: info@brightpathdigital.com

A.3 Useful Placeholders Summary

Placeholder	Replaced With	Purpose
BN	Business Name	Company or client name
PN	Promotion	Active promotion or offer
PNLUR	Promotion Link	URL to landing or offer page
SAPN	Sales Phone Number	Direct line for sales enquiries
SUPN	Support Phone Number	Customer support line
CFURL	Contact Form URL	Direct contact form link

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A.4 Exporting and Backing Up Chatbots

Use the **Export/Backup Chatbots** feature to create data-only backups of your chatbot configurations (**API keys and training files are NOT included**).

You can then import these backups into another installation using the **Import/Restore Chatbots** feature.

Steps:

1. Go to **Settings** → **Chatbot HTML Manager**.
2. Select **Export/Backup Chatbots (Data-only)**.
3. Click **Download Chatbot Backup (JSON)**.
4. To restore, upload this file under **Import/Restore Chatbots**.

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Export/Backup Chatbots (Data-only:No files)

Download a data-only backup of all chatbot settings. API keys are not exported.

[Download Chatbot Backup \(JSON\)](#)

Import/Restore Chatbots (Data-only:No files)

Restore from a JSON backup created by this plugin. API keys and assistant ids are not imported.

Backup JSON file:

[Browse...](#) html-chatbot-manager-backup-2025-10-10.json

☐ Overwrite existing chatbots with import if they have the same client name.

Leave unchecked to merge only new chatbot imports (Do not update chatbots listed below).

[Import Chatbot Backup \(JSON\)](#)

Note: Click [Edit](#) and add API key to restored chatbots after import. Click [Save Chatbot](#) and [Create Assistant](#) to finalize.

A.5 Support

For the product support visit:

<https://tonymarriott.info/>