How To Build Custom AI Sales & Support Agents

A complete guide to using the WordPress Chatbot Plugin To Create Custom Sales & Support Agents

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Introduction

In this guide I will take you through the practical steps to create a public facing AI powered fully conversational chatbot.

To do this I will be creating an OpenAI Assistant. This is a specific type of fully conversational AI chatbot that can be trained for specific functionality, purpose and business type etc.

It will use your own Sales and Support robot as a template, modified to suit any individual business.

With the Assistant created you can use the our TM chatbot WordPress plugin to connect to the Assistant you created and enable a chatbot to sit on your, or your clients, website. This is public facing and will be available to all website visitors.

You can use this to offer product and services sales, and customer support, specific to your clients. And as the chatbot is AI powered it is able to answer a much wider range of questions than a pre-programmed static chatbot.

It is able to learn from the website and be trained on specific subjects or data. Like price lists, product or service catalogues, contact details and more.

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To build a fully working Sales and Support Agent you will need to create an Assistant in OpenAI. Then install the chatbot WP plugin and connect the chatbot to the OpenAI assistant. And finally personalize the chatbot settings.

If you require further guidance there is a detailed video showing how to create your Sales agent here

The following are specific steps for your **Sales & Support Agent**.

Step 1: Create Your Assistant in OpenAI

1. Log into your OpenAI account
2. Go to the **Assistants** section.
   https://platform.openai.com/assistants
3. Click **Create Assistant**.

Step 2: Add System Instructions

Download and paste the sales and support agent Instructions into the **System Instructions** field.

In the **system instructions** field edit any of the top entries to make it specific to you and your website: i.e.

##Name:Jenny (personal name)

##Business Name : Local AI (business/website name)

##Promotion: 30 day free trial offer for AI Powered Sales & Support Agent.

##Promotion Link:https:/yourwebsite.com/ai-sales-support-agent/ (change yourwebsite to your own)

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##Sales phone number: [add number here]

##General support number:[add number here]

##Training Files: Sales & Support Agent User Guide.pdf, Onboarding Guide.odt, yourwebsite.com-assistant-data.json

1. The promotion wording and the promotion link should be edited to suit the business. It should be their primary product or service and their primary inbound email contact. That can be an existing sales funnel or if there isn't one then create a landing page and link that to the contact-us form.

2. The training files will be specific to your customer and their business. Later you will upload training files. Ensure that the name of any training files is included in the above list.

These should include:

Details and sales information of the promotion.

Product and/or services catalogue

Detailed descriptions of the products and services they provide.

Opening hours, address,

A website page json file that is generated by the plugin. Include About, contact, homepage, services. Products and any other relevant pages.

Generate **yourwebsite.com-assistant-data.json** from the Admin Menu > Chatbot Export > Select posts and pages you want the chatbot to access i.e. Contact, Services, About Us and Homepage.

FAQ, support documents etc.

Delivery terms and conditions.

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Any other documents specific to the business that may help the Sales & Support agent resolve visitors enquiries.

3. You can also add additional telephone numbers or contact points. Ensure they start with ## and detail what they are for i.e.

Delivery Support line:0752 1233445:If unable to resolve delivery enquiries.

In the above example I would expect that the delivery schedules and/or terms have been uploaded as a training file. If the Agent cannot answer the visitors questions satisfactorily it will ask them to call that number.

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Step 3: Training the Assistant with Website Content

To improve the chatbot's ability to answer business and website related queries, you can provide it with relevant content from your clients website. The TM Chatbot Assistant plugin includes a built-in tool for exporting text from selected pages and posts. This content can then be uploaded to OpenAI's Assistants platform to enhance the Sales & Support agents knowledge.

Exporting Website Content for Training

1. In the WordPress admin dashboard, go to **Settings > Chatbot Assistant**.
2. Click on the **Chatbot Export** tab.
3. A list of all website pages and blog posts will be displayed.
4. Select the pages and posts that contain useful, related information.
5. Click the **Generate and Download** button.

The plugin will create a **.json** file containing the text from the selected posts and pages.

The exported file will be named using your website's domain name, for example:
yourwebsite.com-assistant-data.txt

In the example below I have selected Homepage, About Us, Services and Contact pages.

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You could include things like privacy policy, term & conditions and other pages that may hold information a visitor may request.

Export Website Content for Chatbot

Select all required pages and posts from the list below to create a JSON data file for training the assistant.
The training file contains page Title, Page URL and any text on that webpages.
Once downloaded, upload the file to the assistant in the OpenAI Assistants page: https://platform.openai.com/assistants.
Note that Assistants and API Keys now reside within an OpenAI Project. You can have multiple Assistants and API Keys in a pr

- [ ] **Select All**
- [ ] AI Sales & Support Agent
- [ ] How AI Can Personalize Customer Experiences and Drive Loyalty
- [ ] AI Cost Savings-How Automation Can Improve Your Bottom Line
- [ ] The Future of Local Business- Why AI Adoption is No Longer Optional
- [ ] AI-Powered Marketing. How Local Businesses Can Attract More Customers
- [ ] Automating Customer Service. AI Solutions for Faster and Smarter Responses
- [ ] Privacy Policy
- [ ] AI-Post-Poster
- [ ] How AI Chatbots Can Improve Customer Support and Boost Satisfaction
- [ ] Maintenance Plans
- [ ] Blog
- [x] Contact
- [x] Services
- [x] About Us
- [x] Homepage
- [ ] Portfolio Single
- [ ] Portfolio
- [ ] News & Tips

Generate and Download

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Best Practices for Content Selection

- Select Homepage, About and Contact pages
- Optionally, select **FAQ pages**, blog posts, product and service pages and any guides related to the specific business.
- Avoid pages with irrelevant content or marketing-heavy language.
- Keep the exported content concise and structured for better AI comprehension.

Once the content is uploaded, your Sales & Support agent will use it as reference material when responding to user enquiries, improving scope and the accuracy of it's answers.

Step 4: Upload Training Files

Upload the supporting documents that will teach your assistant about your service:

1. Customer specific files described above
2. yourwebsite.com-assistant-data.json

Generate and download file 2 using the Settings > Chatbot Export option in your website admin menu as described above.

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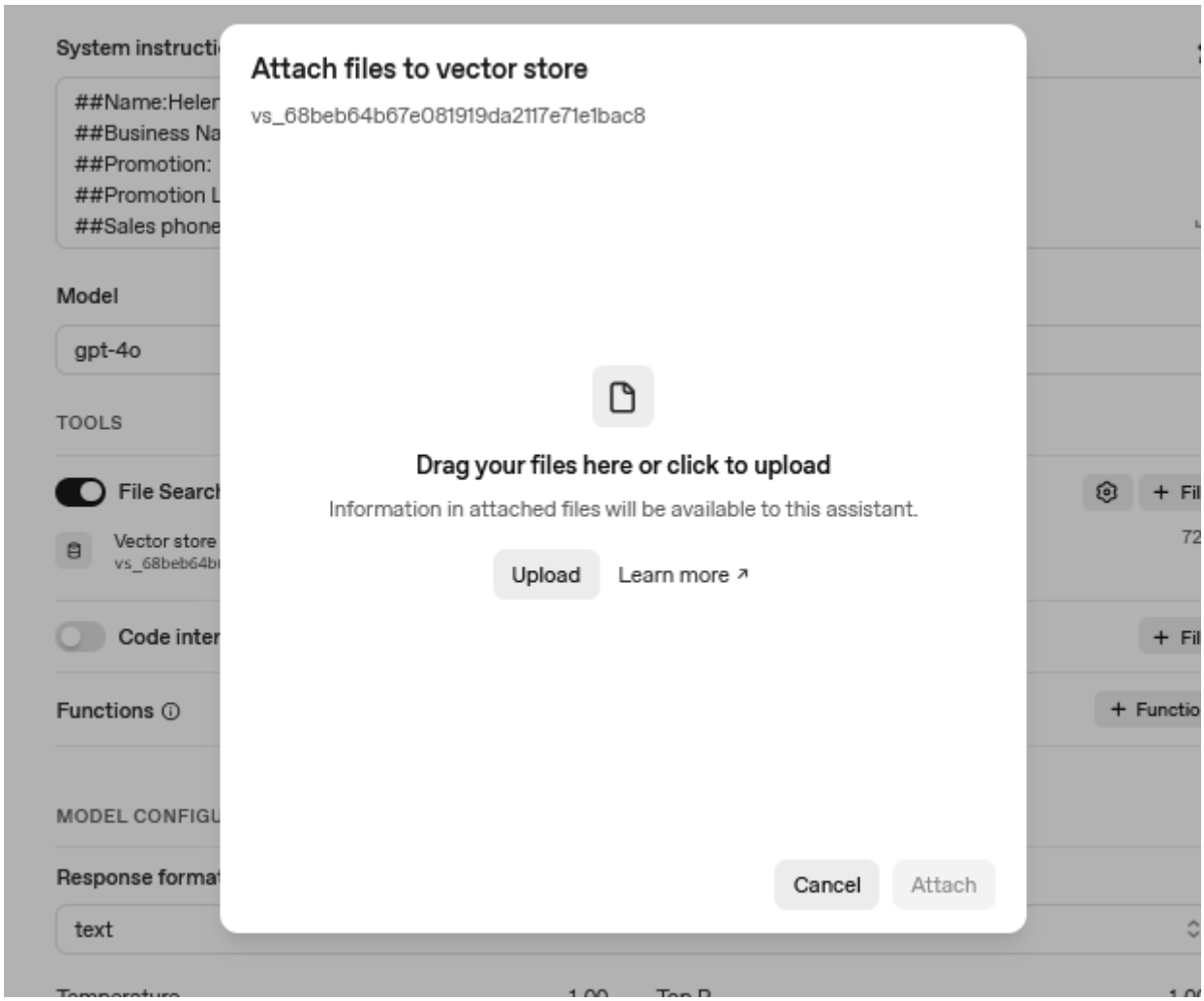
Ensure you upload to the File Search section, NOT Code Interpreter.



Select or drag the files you want to upload and click **Attach**.

Ensure these files are also listed in your **system Instructions.**

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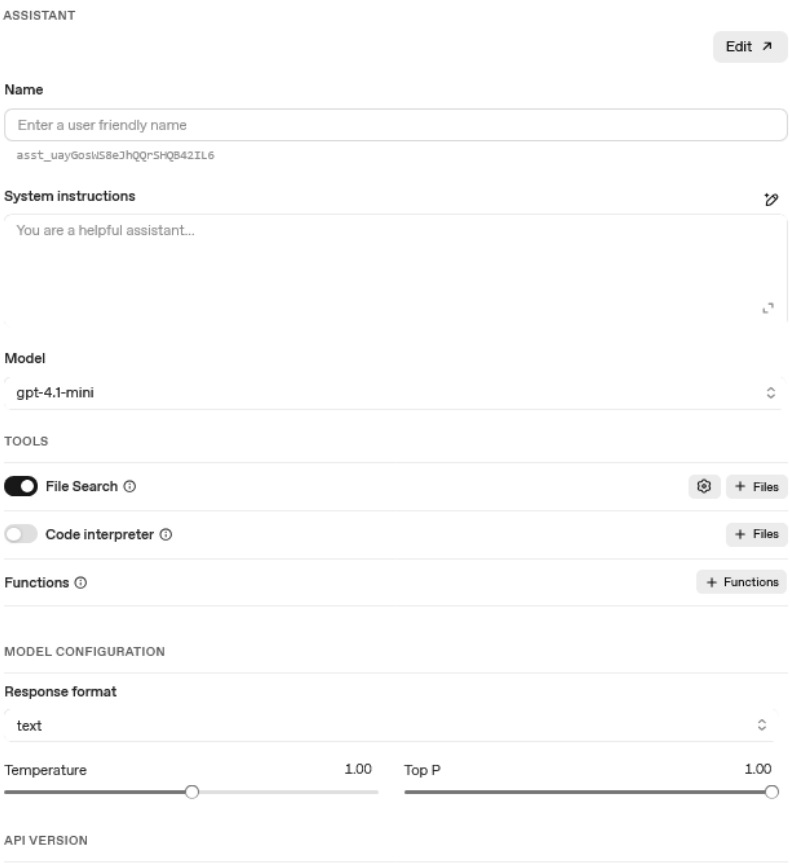
Step 5: Configure Model & Tools

1. Select **GPT-4o, GPT-4.1** or try **GPT-4.1-mini.**
2. Generally select the most recent model. That is usually on the top of the selection list. However using the mini-version will significantly reduce API call costs and generally be suitable for your agent.
3. Enable **File Search** so the assistant can reference the uploaded documents.
4. Leave everything else as default but see notes on temperature below.



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Temperature: Try 0.5 but can test 0.4-0.6

The temperature setting has a big impact on how your assistant responds.

In the context of a **sales & support agent chatbot**:

- **Low temperature (0.0 – 0.3)**
  - Responses are more **accurate, consistent, and factual**.
  - Best for **customer support** where reliability and clarity matter more than creativity.
  - Example: Answering FAQs, explaining product features, or troubleshooting.
- **Medium temperature (0.4 – 0.6)**
  - Adds a bit more **flexibility and natural tone** while staying mostly grounded.
  - Good balance if your chatbot needs to handle both **support** and some **light sales conversations**.
- **Higher temperature (0.7 – 1.0+)**
  - More **creative, varied, and persuasive** answers.
  - Useful if your chatbot is heavily focused on **sales**, engaging prospects, or suggesting upsells.
  - But this can risk answers that drift away from strict accuracy.

So, the higher the temperature the more “salesy” (imaginative) it will be. The lower the temperature the more accurate support you will get.

So your exact setting may depend on the customer requirements.

Feel free to test your agent at various teperatures.

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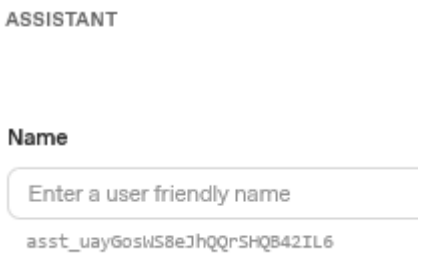
Step 6: Copy the Assistant ID

1. After saving, copy the unique **Assistant ID**. (asst_******)
2. You'll need this for your website setup.



Step 7: Configure the Chatbot on Your Website

If you need more guidance, you can refer to this video that shows a general guide to setting up your Chatbot plugin.

Plugin Installation Guide

This section will guide users through **installing, activating, and setting up** the WP Chatbot Assistant plugin in WordPress.

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Installing the WP Chatbot Assistant Plugin

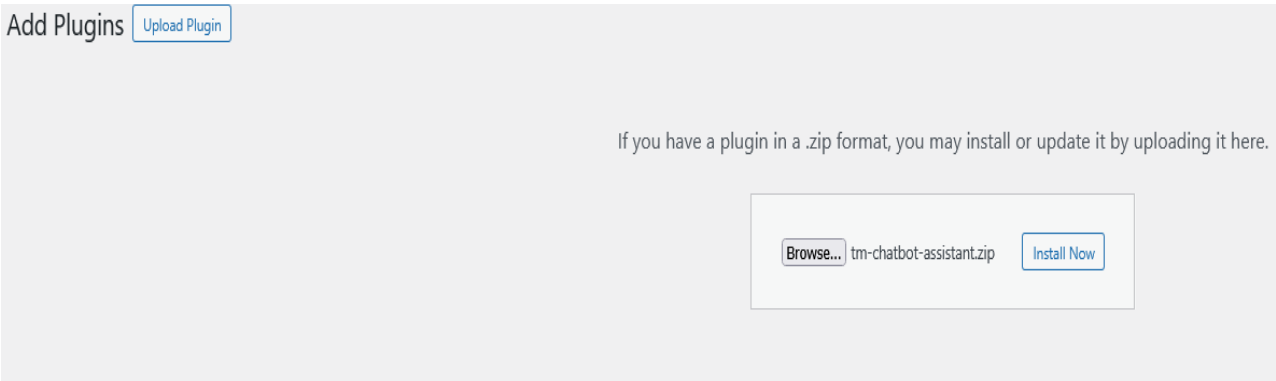
To use the WP Chatbot Assistant, you need to upload and activate it in your WordPress dashboard. Follow these steps:

1. Download the Plugin

Ensure you have the plugin's ZIP file (**tm-chatbot-assistant.zip**) ready for upload.

2. Upload the Plugin to WordPress

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



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3. Activate the Plugin

1. Once the installation is complete, click **Activate Plugin**.
2. After activation, a new settings page will be available under **Settings > Chatbot Assistant**.

1. Go to: **Settings → Chatbot Assistant**.
2. On the configuration page, add or edit the following fields:
   - **Chatbot Avatar:** Choose an image for your assistant.
   - **OpenAI Assistant ID:** Paste the **Assistant ID** you just created**. If needed get** ID from OpenAI Assistants under **Assistant ID** field**.**
   - **OpenAI API Key:** Enter your OpenAI API key (from your OpenAI account). Get from link for API key under API Key field. API keys can be created under different projects. All API keys under one product can be used for that project only. Use this to segregate different customers. i.e. one API Key per project for each client. That way you can track api usage per client.
   - **Chatbox Title:** Add the business name (or website name) . i.g. Bill's Plumbers.
   - **Assistant Name:** Choose a personal name for your chatbot (e.g. Jenny).

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- **Chatbox Place Holder:** Use default or edit to explain what to do with the chat input box. e.g. Ask your questions here.
- **Initial Default Question:** This should relate to primary the Promotion. Or the primary subject the client needs addressing. e.g. See our 50% PVC front doors this week only. Or Let me help you.

  It will be displayed as a button in the chatbot and as a pop-up prompt if the chatbot is not invoked by the visitor. Users can click this prompt or button to ask the chatbot the predefined question without typing.

  This would start a specific process where the chatbot leads the conversation to get the results.
- **Chatbox Background Color**: Select to suite web page style.
- **Chatbox Text Color:** Select to suite web page style.
- **Thread Persistence:** Default 30 minutes. This defines how long a conversation thread will last. It will be closed after this time. Stops multiple conversations being left open.

3. Click the **Save Changes** button to ensure your settings have been stored.

See example of a completed setting form below.

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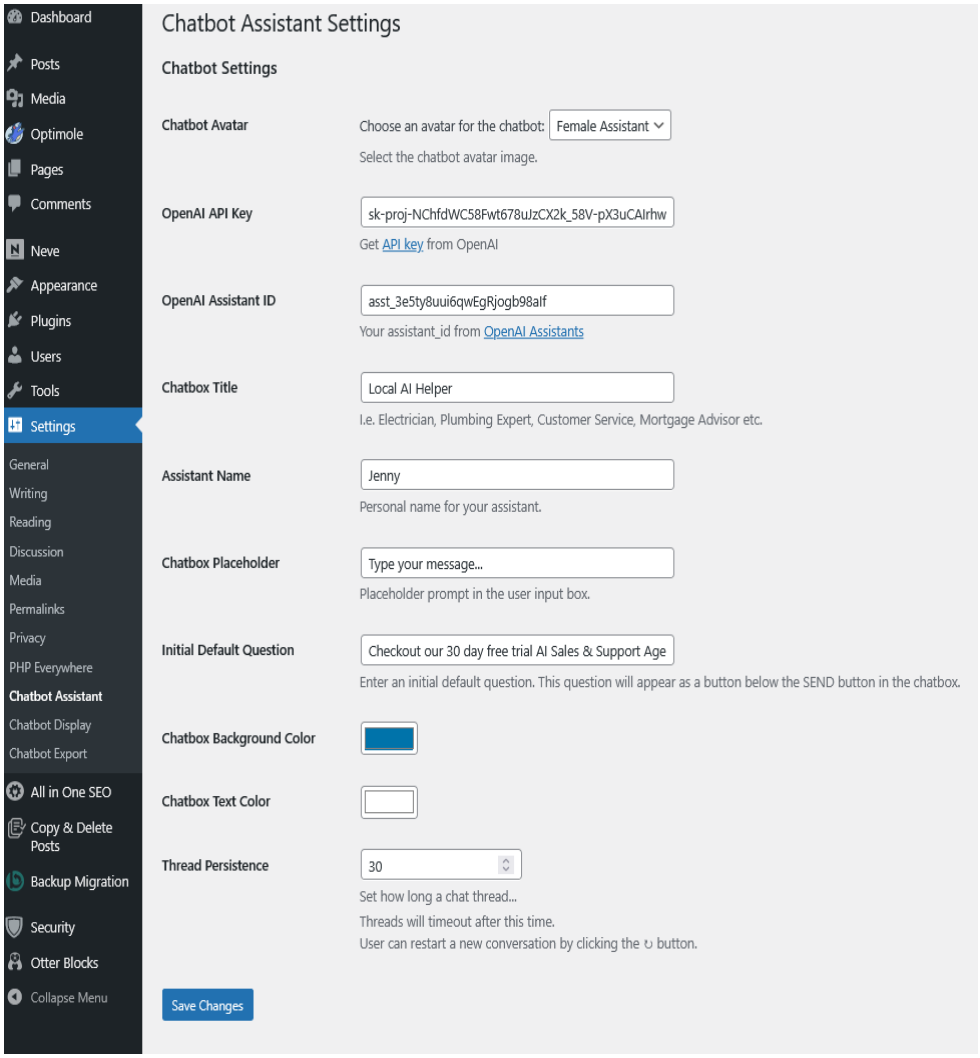

Your Sales & Support Agent is now live on your website, greeting visitors, answering questions, pre-selling and guiding them to the offer.

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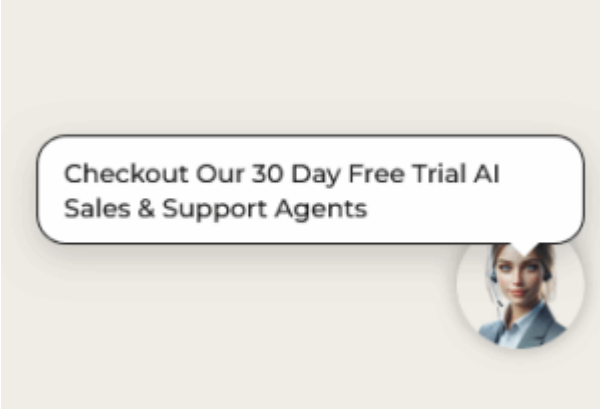
Step 8: Using the Chatbot on Your Website

Once the plugin is installed, configured, and connected to an OpenAI Assistant, visitors can start interacting with the chatbot on your website. This section explains how the chatbot works and how users can engage with it.

How the Chatbot Appears on the Website

- The chatbot remains **hidden by default**, displaying only the assistant's avatar.
- If the visitor does not open the agent after a short time, it will display a prompt.



- Clicking on the **avatar** opens the chatbot interface.
- Clicking the prompt will start a conversation automatically.
- The chatbot will display an **intro message** explaining its purpose or respond to the question.

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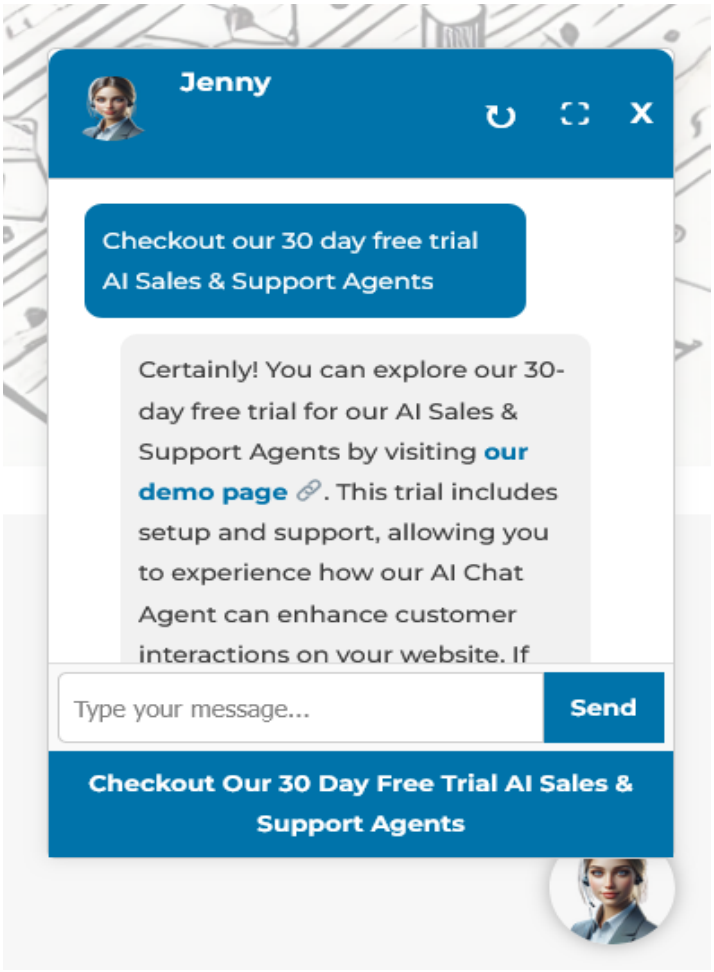

User Interaction with the Chatbot

- Visitors can **type questions** in the chat input box and click **Send** to submit them.
- The chatbot responds based on its training and OpenAI Assistant settings.
- Users can also click the **default question button** to quickly check mortgage eligibility. This will prompt the chatbot to take control of the conversation and ask you what it needs to complete the task.

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Example Interaction

1. A visitor clicks the chatbot avatar to open the chat.
2. The chatbot greets the user:
   "Hi, I'm Jason, your mortgage assistant."
3. The user types: **a question** or clicks the **"Check if I qualify for a mortgage"** button.
4. The chatbot guides the user through questions about **income, credit score, and loan amount** or answers the specific questions.
5. If applicable, the chatbot offers to **generate a mortgage estimate** as a PDF or text file.

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Step 9: Security and Best Practices

To ensure the WP Chatbot Assistant functions securely and efficiently, follow these best practices when using the plugin.

Protecting Your OpenAI API Key

- The plugin securely stores the API key in the WordPress database and uses server-side requests to communicate with OpenAI so your API key is never revealed in the public facing code.

Restricting Assistant Responses

- The chatbot only answers business related **queries**, as defined in the assistant's instructions.
- If users ask unrelated questions, The agent responds with: **"Sorry, I can't help with that."**
- This prevents misuse and ensures the chatbot stays on-topic. It is important to ensure that users cannot abuse the AI power available so restricting to a narrow subject is required.

Limiting Data Exposure

- Only select **relevant posts and pages** when exporting website content to train the assistant.
- Avoid including **sensitive or private data** in the uploaded training files.

Regularly Updating the Plugin

- Keep the plugin updated to ensure compatibility with **new OpenAI API versions**. Check your download page for updates.
- Future updates may include **performance improvements, security enhancements and additional functionality.**

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By following these steps, you can ensure that the chatbot remains secure, reliable, and aligned with business objectives.

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