AI Agent Configuration Form

Complete this form to define your AI agent's behavior and capabilities

1. Agent Name

Give your AI agent a unique identifier

Agent Name:

Examples: "Maya - Customer Support Assistant", "SalesBot Pro", "TechHelper 3000"

2. Agent Description

Provide a brief overview of what this agent does and its primary purpose

Description (2-3 sentences):

Example: "This agent handles customer inquiries for our e-commerce store, providing product information, order status updates, and resolving common issues. It operates 24/7 to ensure customers always receive prompt assistance."

3. Persona & Role

Define the character, responsibilities, and communication style of your agent

3.1 Role Being Played

What role does this agent represent?

3.2 Key Responsibilities

List the main tasks and responsibilities:

1.
2.
3.
4.

5.

3.3 Response Style & Tone

Communication Tone	☐ Formal ☐ Professional ☐ Friendly ☐ Casual
Language	☐ English ☐ Hebrew ☐ Arabic ☐ Other: _____
Use Emojis	☐ Yes, frequently ☐ Occasionally ☐ Never
Response Length	☐ Concise ☐ Moderate ☐ Detailed

3.4 Personality Traits

Describe the agent's personality (e.g., helpful, patient, enthusiastic, empathetic):

4. Skills - Functions & Processes

Define the features, workflows, and how the agent should respond in different scenarios

4.1 Core Capabilities

What can this agent do? Check all that apply:
- ☐ Answer FAQs
- ☐ Collect user information (lead generation)
- ☐ Process orders/bookings
- ☐ Provide product recommendations
- ☐ Troubleshoot technical issues
- ☐ Schedule appointments
- ☐ Transfer to human agent
- ☐ Other: _____

4.2 Workflow Scenarios

Describe how the agent should handle specific scenarios:

Scenario 1: Initial Greeting

When a user starts a conversation, the agent should:

Scenario 2: User Needs Help

When a user asks for help or has a question:

Scenario 3: Agent Cannot Help

When the agent cannot answer or resolve an issue:

Scenario 4: User is Frustrated/Angry

When a user shows signs of frustration or anger:

Additional Scenarios (if applicable):

5. Product & Service Information

Provide detailed information about your products/services that the agent needs to know

5.1 Products/Services Overview

List your main products/services and brief descriptions:

5.2 Specifications & Details

Key specifications, features, or technical details:

5.3 Pricing Information

Pricing, packages, or payment options:

5.4 Booking/Ordering Options

How can customers book/order? Include links if applicable:

5.5 Helpful References & Resources

Links to documentation, FAQs, guides, or other resources:

☐ **I will provide additional documentation separately (FAQ sheets, product catalogs, etc.)**

6. Constraints & Limitations

Define what the agent should and should NOT do to maintain appropriate boundaries

6.1 Topics the Agent SHOULD Discuss

List topics and questions the agent should answer:

6.2 Topics the Agent Should NOT Discuss

List topics and questions the agent should REFUSE to answer:

6.3 Confidential Information

Information the agent must NEVER reveal:

6.4 Behavioral Restrictions

Actions or behaviors the agent should avoid:
☐ Never make promises about delivery times
☐ Never provide legal/medical/financial advice
☐ Never discuss competitors

☐ Never share internal pricing/discounts without approval
☐ Other: _____

6.5 Escalation Rules

When should the agent immediately escalate to a human?