■ Assistant Creation & Knowledge Base Update Guide

1. Assistant Creation Process

Step 1 — Enter Assistant Name

This will be the unique identifier for your AI assistant. Choose a clear and descriptive name so you can easily find it later.
Example: Sales Assistant, Customer Support Bot, Crypto News Advisor

Step 2 — Set First Message

This is the opening greeting your assistant sends when a conversation starts. Keep it friendly, professional, and relevant to your assistant's role.
Example: "Hello! ■ I'm here to help you with your sales queries."

Step 3 — Define System Prompt

The system prompt is the set of instructions that guide your assistant's behavior and knowledge. Use clear and concise instructions, including tone, boundaries, and goals.
Example: You are a helpful sales assistant who answers queries about our products. Always provide accurate and concise information. If you don't know the answer, politely say so.

2. Updating the Knowledge Base

Step 1 — Access Knowledge Base

Open the assistant's knowledge base management section. This contains documents, FAQs, and reference files that the assistant uses to answer questions.

Step 2 — Add or Update Content

To add: Upload relevant documents (PDF, DOCX, TXT) and add FAQs or structured text data. To update: Edit existing documents, remove outdated content, and replace with the latest information.

Step 3 — Save & Re-index

After adding or editing content, save changes and re-index so the assistant can use the new information immediately.

Step 4 — Test the Assistant

Ask questions related to the new knowledge base entries. Ensure the assistant responds accurately and uses the updated data.

■ Tip: Keep your knowledge base organized by categories (Products, Policies, Procedures, etc.) so updates are easier to manage.