User Manual - Multi-Tenant Chatbot Platform

Introduction

Welcome to the **Multi-Tenant Chatbot Platform** — a powerful, easy-to-use SaaS solution for businesses to create, customize, and embed AI-powered chatbots on their websites. This manual covers everything you need to get started, from installation to advanced customization.

What You'll Learn

- How to install the chatbot widget on your website
- How to manage FAQs and build a knowledge base
- How to create guided conversation flows visually
- How to view and manage form submissions
- How to understand your analytics and manage your subscription

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Chapter 1: Getting Started

1.1 Dashboard Overview

When you log into the platform, you'll see the **Client Dashboard** with the following main sections:

- **Dashboard Home**: Shows key metrics about your chatbot's performance
  - Total Leads Captured
  - Leads Captured Today
  - Total Chats Started
  - Total FAQs Clicked
  - Total Chat Redirects (Form Submissions)
- **Your Plan Status**: Displays your current subscription plan, status (active/inactive), and expiration date
- **Navigation Menu**: Quick access to all features
  - Dashboard
  - FAQs & NLP (Knowledge Base)
  - Guided Flows (Visual Flow Builder)
  - Leads (Form Submissions)
  - Installation
  - Billing

1.2 Login and Authentication

1. Visit the login page of your chatbot platform
2. Enter your **Username** (your client account identifier)
3. Enter your **Password**
4. Click **Log In**
5. You'll be redirected to the Dashboard Home if credentials are correct

The system validates your authentication token on every login. If your session expires, you'll be redirected to login automatically.

Chapter 2: Installation - Getting the Widget on Your Website

2.1 Finding Your Installation Snippet

1. Click **Installation** in the main navigation menu
2. You'll see your unique chatbot widget code:

2.2 How to Install

1. **Copy the Snippet**: Click the **Copy** button next to the code to copy it to your clipboard
2. **Paste in Your Website**: Open your website's HTML file
3. **Place the Code**: Paste the snippet **right before the closing `</body>` tag** (at the bottom of your HTML file):
   </head>
   </html>
4. **Save and Test**: Save your changes and refresh your website. You should see a blue chat bubble in the bottom-right corner

2.3 The Chat Widget

Once installed, visitors to your website will see:

- **Chat Bubble**: A blue circular button in the bottom-right corner
- **Chat Window**: Clicking the bubble opens a chat interface where visitors can interact with your chatbot
- **Online Status**: A green dot indicates the chatbot is active and ready to chat

2.4 Testing Before Going Live

- Test on a staging/development site first if possible
- Check that the chat bubble appears
- Start a chat and verify messages display correctly
- Test on mobile devices to ensure responsiveness

Chapter 3: Building a Knowledge Base with FAQs

3.1 What is the FAQ Section?

The **FAQs & NLP** section is your chatbot's knowledge base. You add question-answer pairs here, and the bot uses them to respond intelligently to user questions.

3.2 Adding a New FAQ

1. Click **FAQs & NLP** in the main menu
2. You'll see a form titled **"Add New FAQ"** at the top
3. Fill in the fields:
    - **Users Question**: What the user might ask (e.g., "What services do you offer?")
    - **Bots Response Type**: Choose how the bot should respond:
        - **Simple Text**: A single text answer
        - **Rich Options**: A message with clickable buttons for the user to choose from
4. **For Simple Text Responses**:
    - Type the bot's answer in the **Bot's Answer** field
    - Example: "We offer web design, mobile apps, and AI solutions"
5. **For Rich Option Responses**:
    - Type the **Bot's Message** (the main text the bot says)
    - Click **Add Option** to add clickable buttons
    - For each option, enter:
        - **Button Text**: What the button says (e.g., "Web Design")
        - **Payload/Node ID**: The next step or action (e.g., "webdesign_info" or "welcomenode")
6. Click **Add FAQ** to save

3.3 Viewing and Managing FAQs

Below the form, you'll see a **table of all FAQs** showing:

- **Question**: The user question
- **Type**: "Text" or "Rich" response type
- **Preview**: A snippet of the bot's response
- **Actions**:
    - **Edit**: Modify the FAQ
    - **Delete**: Remove it (careful — this cannot be undone)

3.4 Editing an FAQ

1. In the FAQ table, click the **Edit** button for the FAQ you want to change
2. The form fills with the current data
3. Update the question, response type, or message
4. Click **Update FAQ** to save changes

3.5 Deleting an FAQ

1. Find the FAQ in the table
2. Click the **Delete** button
3. Confirm when prompted
4. The FAQ is permanently removed from your knowledge base

3.6 How the Bot Uses FAQs

- When a user asks a question in the chat widget, the bot's NLP engine searches your FAQs
- It finds the closest matching FAQ and returns that answer
- If no good match is found, the conversation may be redirected to a Guided Flow or form

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Chapter 4: Creating Guided Conversation Flows

4.1 What are Guided Flows?

Guided Flows are the pathways your chatbot follows. Instead of relying only on FAQs, you design step-by-step conversations using a visual builder. Think of it like a flowchart where each box is a conversation step and lines show where the conversation goes next.

4.2 Accessing the Visual Flow Builder

1. Click **Guided Flows** in the main menu
2. You'll see:
   - A large **canvas** (dark area) in the middle where your flow lives
   - **Control buttons** at the bottom

4.3 Understanding the Canvas

On the canvas, you'll see white cards (nodes) that represent conversation steps:

- **Step Name** (top-left of card): The technical identifier for this step
- **Bot Message**: What the chatbot says at this step
- **Options/Buttons**: Clickable buttons the user can choose from
- **Connection Dots**:
  - Left side: Where arrows come *into* this step
  - Right side of each option: Where arrows go *to the next* step

4.4 Creating a New Step

1. Look at the **bottom control bar** of the canvas
2. Click the **blue "Add Node" button** (+ symbol)
3. A new white card appears on the canvas with a default name like "newnode_123"
4. **Drag it** to position it where you want it
5. The backend automatically saves the new step — no manual save needed

4.5 Editing a Step's Message

1. **Double-click** the white card you want to edit
2. A panel opens on the right side titled **"Editing [Step Name]"**
3. You'll see:
    - **Node ID** field: The technical name (read-only usually)
    - **Message** textarea: The bot's message — type or edit what the bot says here
    - **Options List**: Buttons below the message
4. **Edit or add options**:
    - Click **Add Button** to create a new option
    - For each option, enter:
        - **Button Text**: What users see
        - **Payload/Next Node ID**: Which step this option leads to
    - Delete options by clicking the **X** button
5. Click **Save Flow** to store changes, or **Cancel** to discard

4.6 Connecting Steps (Creating Arrows)

1. Find the option (button line) you want to link
2. **Hover over the small purple/colored dot** on the right end of that option line
3. **Click and drag** the dot toward the card you want to go to next
4. **Release the mouse** when over the target card
5. A curved arrow appears, showing the connection

Once connected, when users pick that option, they'll be directed to the connected step.

4.7 Rearranging Steps on the Canvas

1. Click and drag any white card to move it
2. Position is automatically saved
3. After moving many cards, click the **"Fit View"** button (bottom bar) to center and zoom to show all steps

4.8 Deleting a Step

1. Double-click the card to open the editor
2. Scroll to the bottom of the editor panel
3. Click the **Delete** button
4. Confirm when prompted
5. The card and all its connections are removed

Important: After deleting, check other steps to ensure their options still lead somewhere sensible.

4.9 Example: Building a Simple Flow

Scenario: Create a flow for a restaurant reservation chatbot

1. **Create Step 1 - Welcome**
    - Message: "Welcome! Would you like to make a reservation?"
    - Options: "Yes, make a reservation" → node_reservation
    - Options: "See our menu" → node_menu
2. **Create Step 2 - Reservation**

    - Message: "How many people?"
    - Options: "1-4 people" → node_time
    - Options: "5+ people" → node_large_group
3. **Create Step 3 - Time**
    - Message: "What time would you like?"
    - Options: "Lunch" → node_confirm
    - Options: "Dinner" → node_confirm
4. **Create Step 4 - Confirm**
    - Message: "Great! We'll contact you to confirm. May we have your name and phone?"
    - Options: "Submit contact info" → node_form
5. **Connect with arrows** from each option to the next step
6. **Rearrange cards** so arrows flow clearly left-to-right or top-to-bottom

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Chapter 5: Managing Form Submissions and Leads

5.1 What is the Leads Page?

The **Leads** (or "Form Submissions") page shows all the form data visitors have submitted through your chatbot. This includes:

- Name
- Email
- Phone number
- Message or inquiry text
- Submission date and time

5.2 Accessing Your Leads

1. Click **Leads** in the main navigation
2. You'll see a **table of all submissions**, showing:
    - **Submitted On**: Date and time
    - **Name**: Visitor's name
    - **Email**: Contact email
    - **Phone**: Phone number (if provided)
    - **Message**: The inquiry or message text

5.3 Using Lead Data

- **Export**: You can manually copy submission data from the table
- **Email Integration** (future feature): The platform may automatically email you new submissions
- **Follow Up**: Use the contact information to reach out to visitors
- **Track Patterns**: Look at message content to understand common questions or interests

5.4 Form Submission Flow

When a user fills out the lead capture form in your chatbot:

1. They enter Name (required), Email (required), Phone (optional), and Message (required)
2. They click "Send Message"
3. The form data is submitted to the backend
4. A confirmation message appears: "Thank you! Your message has been sent. Our team will get back to you shortly."
5. The submission appears in your Leads table

Chapter 6: Understanding Your Analytics

6.1 Dashboard Metrics

The **Dashboard Home** displays real-time metrics about your chatbot:

- **Total Leads Captured**: Cumulative count of all form submissions
- **Leads Captured Today**: New submissions from today only
- **Total Chats Started**: Number of times visitors opened the chat widget
- **Total FAQs Clicked**: How many times FAQ responses were used
- **Total Chat Redirects**: Number of form submission redirects

6.2 Using Analytics to Improve

- **High FAQ clicks** → Your FAQs are helpful; ensure they cover the right topics
- **Low chat starts** → The widget may not be visible or appealing; check placement
- **Many form submissions** → Leads are being captured; follow up promptly
- **Chat redirects** → Visitors want to provide more information; your form is working

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Chapter 7: Subscription and Billing

7.1 Accessing Billing

1. Click **Billing** in the main navigation
2. You'll see:
    - Your **current plan** with status (Active/Inactive)
    - Plan **features and limits** (number of FAQs, leads, etc.)
    - Available **pricing plans** to choose from
    - Expiration date of your current plan

7.2 Upgrading or Changing Plans

1. On the **Billing** page, view all available plans (e.g., Basic, Pro, Enterprise)
2. Click the button for the plan you want
    - If it's the current plan, the button is disabled
    - Otherwise, it shows "Subscribe for [price]/month"
3. Click the plan button
4. A confirmation dialog appears
5. Click **"Proceed to Payment"** to continue

6. You'll be directed to the Razorpay payment gateway
7. Complete payment using your preferred method
8. Payment confirmation is shown; your plan is immediately activated

7.3 Plan Features

Each plan may include:

- Maximum number of FAQs
- Maximum number of leads/submissions per month
- Custom branding options
- API access
- Priority support

Check your plan details on the Billing page.

7.4 Subscription Status

Your plan status shows:

- **Active**: Your subscription is current and the chatbot is fully functional
- **Inactive**: Subscription has expired; reactivate by selecting a new plan

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Chapter 8: Advanced Usage

8.1 Node IDs in Guided Flows

Each step in your flow has a **Node ID** — a unique technical name like:

- `welcomenode` (built-in welcome step)
- `showform` (built-in form step)
- `webdesign_info`, `pricing_faq`, etc. (custom steps you create)

When connecting options to steps, you reference the Node ID.

8.2 Core Built-In Nodes

The platform includes two core nodes that cannot be deleted:

- **welcomenode**: The initial greeting step when the chat starts
- **showform**: The form submission step for lead capture

Ensure options from other steps properly route to or from these core nodes.

8.3 Payload Field in FAQs

In rich option FAQs, the **Payload/Node ID** field determines which guided flow step loads when that option is clicked. Examples:

- `welcomenode` → Go back to the welcome step
- `node_support_ticket` → Route to a support ticket creation flow
- `callback_request` → Route to a callback request form

8.4 Testing Your Chatbot

After building flows and FAQs:

1. **On your website**: Click the chat bubble in the bottom-right
2. **Test user paths**:
    - Ask questions covered in FAQs
    - Follow guided flow options to ensure they lead to the right steps
    - Submit a test form to verify lead capture
3. **Check edge cases**:
    - What happens if a user goes off-script?
    - Do all options connect to valid steps?
    - Are messages clear and helpful?

Chapter 9: Widget Customization

9.1 Appearance and Styling

The chat widget includes professional styling:

- **Color Scheme**: Blue gradient (can be customized via backend)
- **Position**: Fixed to bottom-right corner of viewport
- **Responsive**: Works on mobile, tablet, and desktop
- **Animation**: Smooth fade-in effect when opened

9.2 Mobile-Friendly Design

The widget is fully responsive:

- On mobile devices, the chat window expands to full screen
- Touch-friendly buttons and input fields
- Optimized font sizes and spacing for small screens

Chapter 10: Troubleshooting

10.1 Chat Bubble Not Appearing

Problem: You installed the snippet, but the chat bubble doesn't show on your website.

Solutions:

1. Verify the `<script>` tag is placed **before the closing `</body>` tag**
2. Check that your **Client ID** in the `data-client-id` attribute is correct
3. Clear your browser cache and refresh the page
4. Check browser console (F12 → Console tab) for error messages
5. Verify your subscription is **Active** on the Billing page

10.2 Chatbot Not Responding

Problem: The chat window opens, but the bot doesn't respond to messages.

Solutions:

1. Refresh the page and try again
2. Check your internet connection
3. Ensure your **plan is active** (not expired)
4. Verify **FAQs and flows** are properly created and saved
5. Check if the backend server is accessible (test the API endpoints)

10.3 Forms Not Submitting

Problem: Users click "Send Message" but the form doesn't submit.

Solutions:

1. Ensure all **required fields** (Name, Email, Message) are filled in
2. Check that the **showform** node exists and is accessible in your flow
3. Verify your plan allows form submissions
4. Check browser console for error messages
5. Test with a new form submission from a different browser/device

10.4 Lost Connection During Chat

Problem: The chat crashes or disconnects mid-conversation.

Solutions:

1. Refresh the page and start a new chat
2. Check your internet connection
3. Verify the backend API is running and accessible
4. Try again in a few moments (temporary server issues may self-resolve)

10.5 FAQ Not Found

Problem: You added an FAQ, but the bot doesn't respond when users ask that question.

Solutions:

1. Verify the **question phrasing**. The bot's NLP looks for similar wording, not exact matches
2. Add **variations** of the question as separate FAQs (e.g., "What services?", "Services offered?")
3. Ensure the **response type** is correct (Text vs. Rich)
4. Check that the FAQ is **saved** (you should see it in the table)

Appendix A: Keyboard Shortcuts and Tips

Canvas Navigation

- **Drag Background**: Move around the flow canvas
- **Zoom In** (Bottom bar): Get closer view
- **Zoom Out** (Bottom bar): See more steps
- **Fit View** (Bottom bar): Auto-center all steps
- **Fullscreen** (Bottom bar): Expand builder to full screen; press **Esc** to exit

Editing

- **Double-click Card**: Open step editor
- **Escape**: Close editor without saving
- **Enter**: Confirm (in some fields)

Navigating the Dashboard

- **Ctrl+K** or **Cmd+K**: Future search feature (if implemented)
- **Click Logo**: Return to Dashboard Home from any page

Appendix B: Support and Next Steps

Getting Help

If you encounter issues not covered in this manual:

1. **Check this guide** — search for your problem in the table of contents
2. **Review error messages** — browser console (F12) often has helpful details
3. **Contact support** — Email the support team with screenshots and detailed description of the issue

Improving Your Chatbot

1. **Monitor analytics** — Check Dashboard Home regularly to see what's working
2. **Gather feedback** — Ask website visitors how the chatbot could be better
3. **Expand FAQs** — Add more question-answer pairs based on real user inquiries
4. **Refine flows** — Simplify complex flows, test edge cases, and iterate
5. **A/B test** — Try different welcome messages or option phrasings to see what converts better

Next Steps

1. ✅ **Install** the widget on your website (Chapter 2)
2. ✅ **Create FAQs** to handle common questions (Chapter 3)
3. ✅ **Build your first flow** — Start with a simple welcome → form → thank you flow (Chapter 4)
4. ✅ **Test thoroughly** — Open your website and chat with your bot
5. ✅ **Monitor leads** — Check the Leads page to see submissions (Chapter 5)
6. ✅ **Upgrade your plan** when ready for more capacity (Chapter 7)

Glossary

- **Canvas**: The main editing area where you build and arrange your conversation flows
- **FAQ**: Frequently Asked Question — a question-answer pair in your knowledge base
- **Flow/Guided Flow**: A step-by-step conversation path you design visually
- **Node**: A single step or message in a guided flow
- **Option/Button**: A clickable choice a user can select in the chat
- **Payload**: The data sent when a user clicks an option; often refers to the next node ID
- **Widget**: The embedded chat interface on your website
- **Lead/Submission**: Form data collected from visitors through the chatbot
- **NLP**: Natural Language Processing — the system that understands user questions and matches them to FAQs
- **Redirect**: Directing the conversation to a different step or flow
- **Node ID**: The unique technical identifier for each conversation step
- **Rich Response**: A bot response with multiple choice buttons
- **Simple Response**: A text-only bot response

Document Information

- **Version**: 1.0
- **Last Updated**: December 24, 2025
- **Platform**: Multi-Tenant SaaS Chatbot Platform
- **For Support**: Contact your platform administrator or support team

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**Thank you for using the Multi-Tenant Chatbot Platform. Happy building! **