



ZelixAI — Getting started

Set up your chatbot and your support channels step by step

zelixai.ai

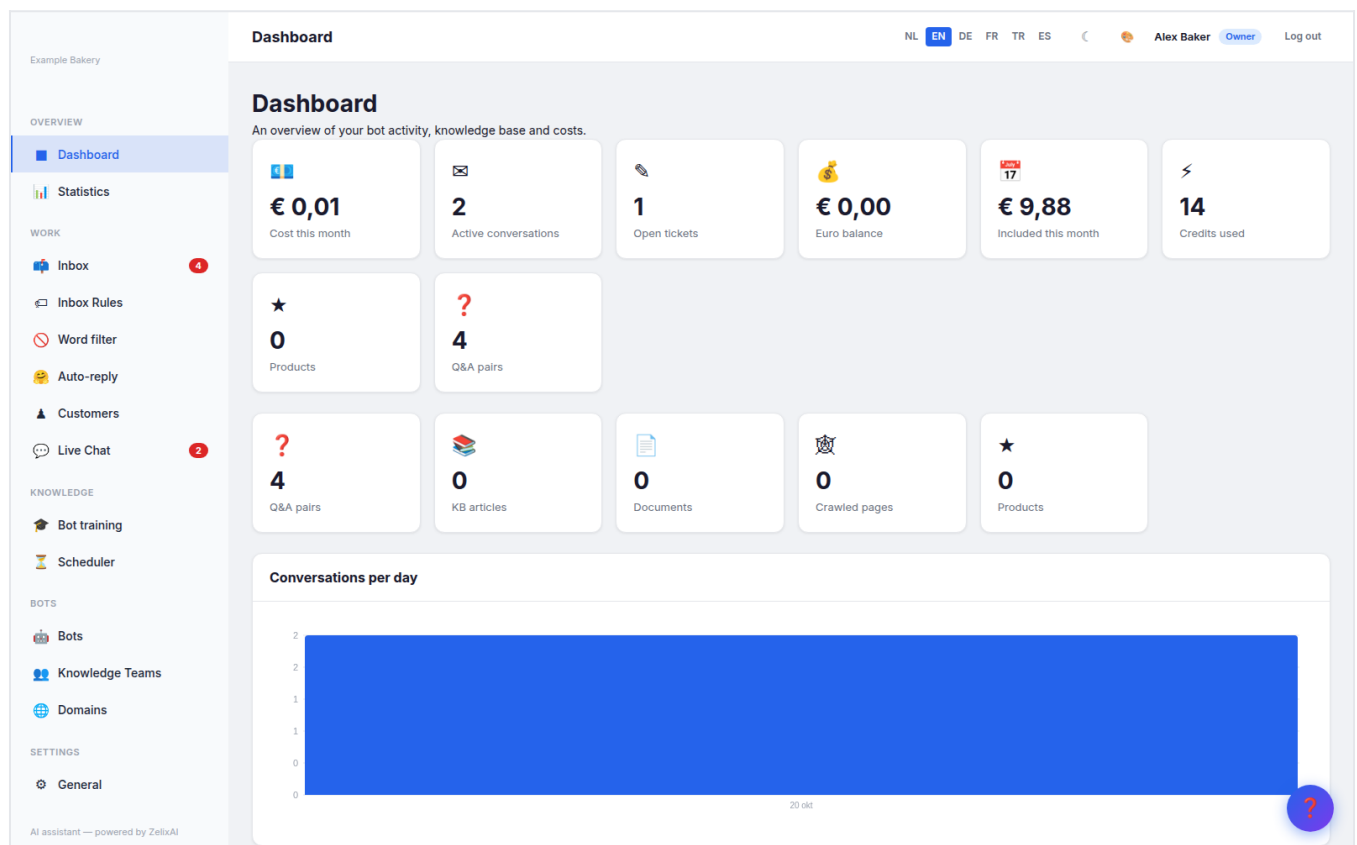
Welcome to ZelixAI

ZelixAI puts a chatbot on your website that answers your visitors' questions. The bot learns from your own website, your own questions and answers and your documents. Chats, e-mail and contact requests come together in the inbox of your portal.

Logging in

1. Go to zelixai.ai/login.
2. Enter your **Login-ID**. You will find it in the e-mail you received after signing up. It is not your e-mail address.
3. Enter your password and click **Log In**.

Forgot your password? Click **Forgot password?** on the login page.



The portal after logging in. The menu is on the left.

Where to find help

- At the bottom right of every portal screen there is a round help button. Ask our help bot your questions there.
- Prefer a person? E-mail support@zelixai.ai.

This guide follows the order in which setting up is easiest: first your bot, then its knowledge, testing, putting it on your website and your channels. You will find a [checklist](#) at the end.

Setting up your bot

Your account already has a first bot. You adjust that one.

1. Go to **Bots > Bots** and click **Edit** next to your bot.
2. On the **Basic** tab, under **Identity**, enter the **Bot name**. Choose a name that tells visitors it is an AI assistant, for example "AI assistant Lisa".
3. Under **Persona**, describe the role and the tone, for example: "You are the friendly assistant of Example Bakery. You keep your answers short and warm."
4. Under **Instructions**, write what the bot should and should not do, for example: "Only answer questions about our shop."
5. Under **Current facts**, add facts the bot must always know, one per line, such as your opening hours.
6. Click **Save**.

The screenshot shows the 'Edit bot' interface for a bot named 'AI assistant Lisa'. The interface is divided into a left sidebar and a main content area. The sidebar contains sections for 'OVERVIEW' (Dashboard, Statistics), 'WORK' (Inbox, Inbox Rules, Word filter, Auto-reply, Customers, Live Chat), 'KNOWLEDGE' (Bot training, Scheduler), 'BOTS' (Bots, Knowledge Teams, Domains), and 'SETTINGS' (General). The main content area has a top bar with language options (NL, EN, DE, FR, TR, ES) and user information (Alex Baker, Owner, Log out). Below the top bar is a tabbed interface with 'Basic', 'Integration', 'LLM & Tools', 'Messages', 'Appearance', and 'Advanced'. The 'Basic' tab is active, showing the 'IDENTITY' section with a 'Bot name' field (AI assistant Lisa) and a 'Type' dropdown (Chat). Below this is a 'Persona' section with a text area containing 'You are the friendly assistant of Example Bakery. You keep your answers short and warm.' and a description 'Describe the personality and role of the bot.' The 'Instructions' section contains a text area with 'Only answer questions about our shop: bread, cakes, opening hours, orders and delivery. If you do not know the answer, say so and offer to have a colleague get in touch. When a customer wants to be contacted, ask for their name and e-mail address and create a contact request.' and a system prompt 'System prompt: tell the bot how to behave.' The 'Current facts' section contains a text area with 'Opening hours: Tuesday to Saturday 8:00-17:00, closed on Sunday and Monday. Gluten-free bread is baked on Wednesday and Saturday. This month's special: apple pie with cinnamon.' and a description 'Facts the bot should always know (one per line)'. The 'Language for Q&A generation' section has a dropdown menu set to 'Automatic (detect language from content)'. The 'Website of this bot' section has a text area with 'https://www.example.com'.

The Basic tab: name, persona and instructions of your bot.

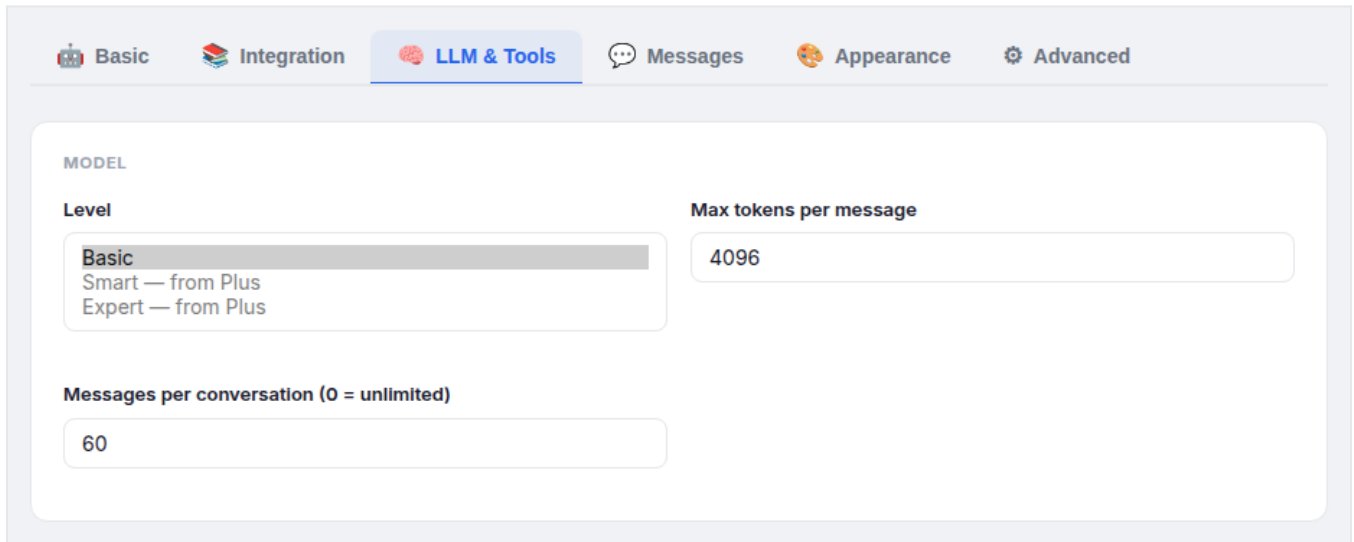
Greeting and suggested questions

1. Open the **Messages** tab.
2. Under **Greeting & Suggestions**, enter the first message visitors see.
3. Under **Suggested questions**, add up to 4 questions visitors can click, one per line.
4. Do your visitors speak several languages? Fill in the greeting per language. If you leave a language empty, the widget uses the default language.

Level of your bot

On the **LLM & Tools** tab, under **Level**, you choose how smart your bot is. **Basic** is available on every package. **Smart** and **Expert** are available from the Plus package; the list shows from which package a level is available.

What a level costs is on zelixai.ai/en/pricing.



The screenshot shows the 'LLM & Tools' configuration tab. At the top, there is a navigation bar with five tabs: 'Basic', 'Integration', 'LLM & Tools' (which is selected and highlighted with a blue underline), 'Messages', and 'Appearance'. Below the navigation bar, the 'MODEL' section is visible. It contains three main settings: 1. 'Level': A dropdown menu with three options: 'Basic' (highlighted with a grey bar), 'Smart — from Plus', and 'Expert — from Plus'. 2. 'Max tokens per message': A text input field containing the value '4096'. 3. 'Messages per conversation (0 = unlimited)': A text input field containing the value '60'.

LLM & Tools tab: Basic on every package, Smart and Expert from Plus.

Teaching your bot

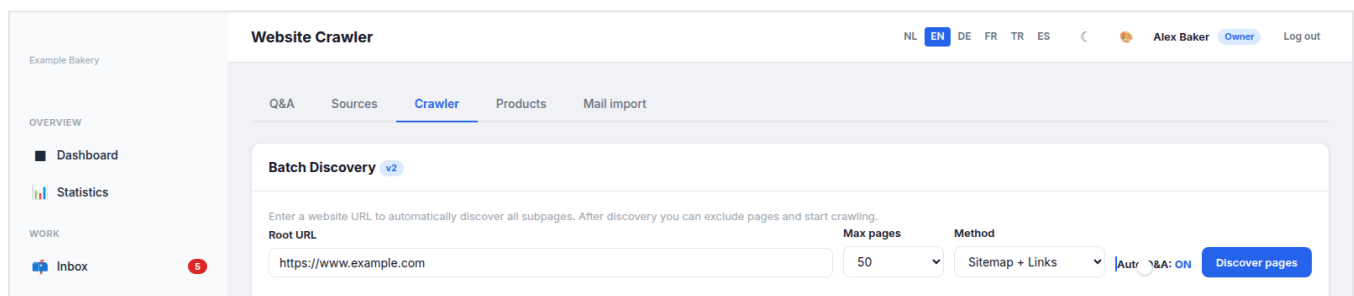
Your bot answers with what you give it. Everything is under **Knowledge > Bot training**.

Let the bot read your website

1. Open the **Crawler** tab.
2. Under **Root URL**, enter the address of your website, for example `https://www.yourbusiness.com`.
3. Under **Max pages**, choose how many pages the bot may read. Start small, for example with 50.
4. Click **Discover pages**. You will see a list of the pages found.
5. Exclude pages the bot does not need, such as your privacy statement or old promotions.
6. Click **Approve & Start**.

Reading pages and making questions and answers uses balance. The portal shows an estimate of what a round costs.

When **Auto Q&A** is on, the bot also makes questions and answers from your pages. These are proposals: you switch them on yourself on the **Q&A** tab.



The Crawler tab: enter your website and discover its pages.

Questions and answers

With your own questions and answers you decide exactly what the bot says.

1. Open the **Q&A** tab and click **+ Add**.
2. Type the question the way a customer asks it, and the answer you want to give.
3. Make sure **Active (approved)** is on and save.

Proposals from your website or documents stay off until you switch them on. The filter for pairs that still need approval helps you find them quickly.

The screenshot shows the 'Bot training' interface. On the left is a sidebar with navigation options: Overview (Dashboard, Statistics), Work (Inbox, Inbox Rules, Word filter, Auto-reply, Customers, Live Chat), Knowledge (Bot training, Scheduler), Bots (Bots, Knowledge Teams, Domains), and Settings. The main area is titled 'Bot training' and has tabs for Q&A, Sources, Crawler, Products, and Mail import. The Q&A tab is active, showing a summary with 4 Total, 4 Approved, and 0 Pending review. Below this is a table of Q&A pairs. The table has columns for Question, Answer, Category, Source, Date, Owner, Status, and Actions. There are five rows of data, each representing a question and its corresponding answer, categorized under 'shop' and 'Manual'.

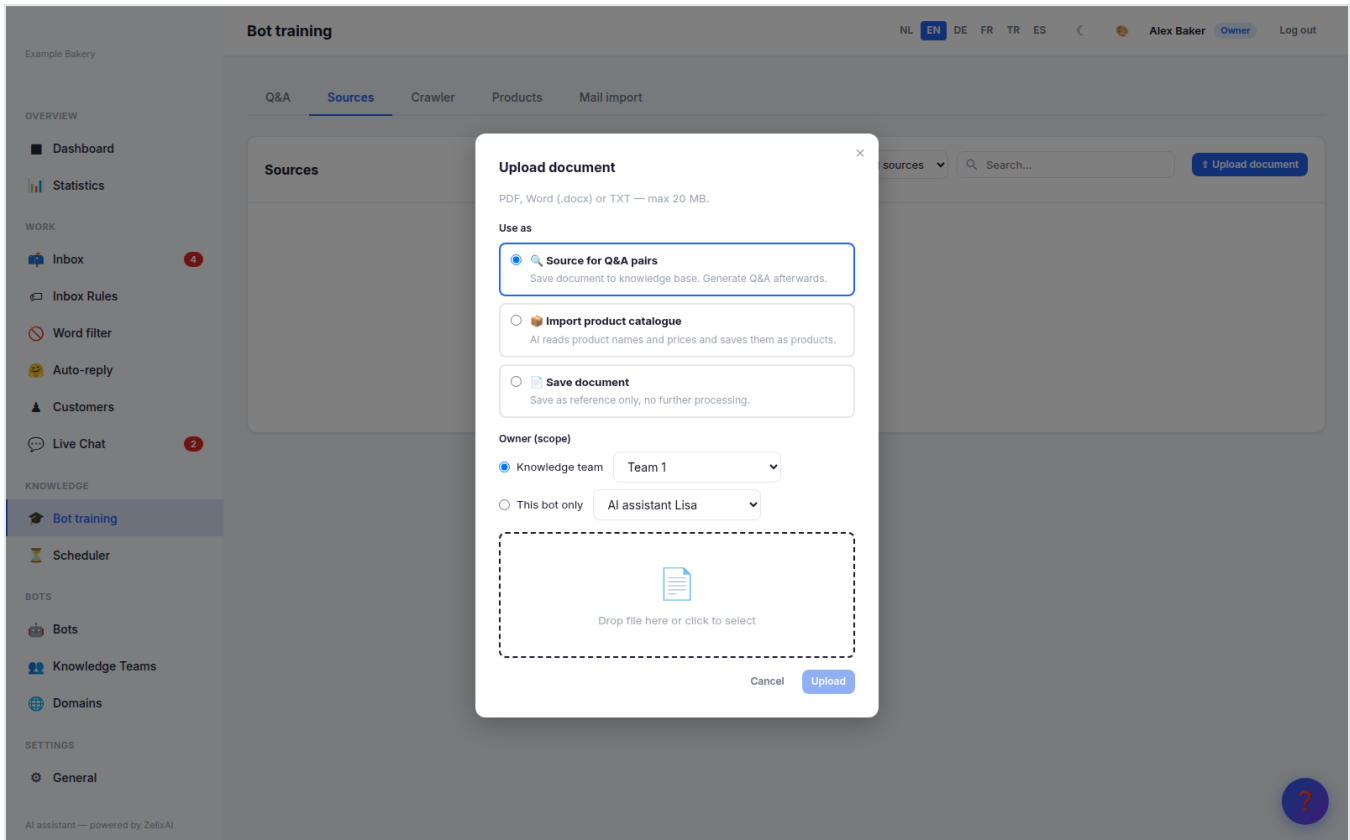
QUESTION	ANSWER	CATEGORY	SOURCE	DATE	OWNER	STATUS	ACTIONS
Can I order a birthday cake?	Yes. Order at least three days in advance in the shop or by phone, and tell us the size and the text...	shop	Manual	40 min ago	Team 1	Active	% Edit ↔ ✖
Do you have gluten-free bread?	Yes, we bake gluten-free bread on Wednesday and Saturday. Ask in the shop which loaves are available...	shop	Manual	40 min ago	Team 1	Active	% Edit ↔ ✖
Do you deliver?	We deliver in town for orders above 25 euros, on weekdays between 10:00 and 15:00.	shop	Manual	40 min ago	Team 1	Active	% Edit ↔ ✖
What are your opening hours?	We are open Tuesday to Saturday from 8:00 to 17:00. On Sunday and Monday we are closed.	shop	Manual	40 min ago	Team 1	Active	% Edit ↔ ✖

The Q&A tab: your own questions and answers.

Documents

1. Open the **Sources** tab and click **Upload document**.
2. Choose a file: PDF, Word (.docx) or TXT, up to 20 MB.
3. Under **Use as**, choose **Source for Q&A pairs** and click **Upload**.

The bot uses the text of your document. Would you like questions and answers made from it as well? Then switch those on afterwards on the **Q&A** tab.



The Sources tab: uploading a document.

Do you sell products? On the **Products** tab you add your products, so the bot can also answer questions about what you offer.

New knowledge is processed in the background, so it is not always usable straight away. Reading a large website takes longer. Check it afterwards with a test conversation: see [testing your bot](#).

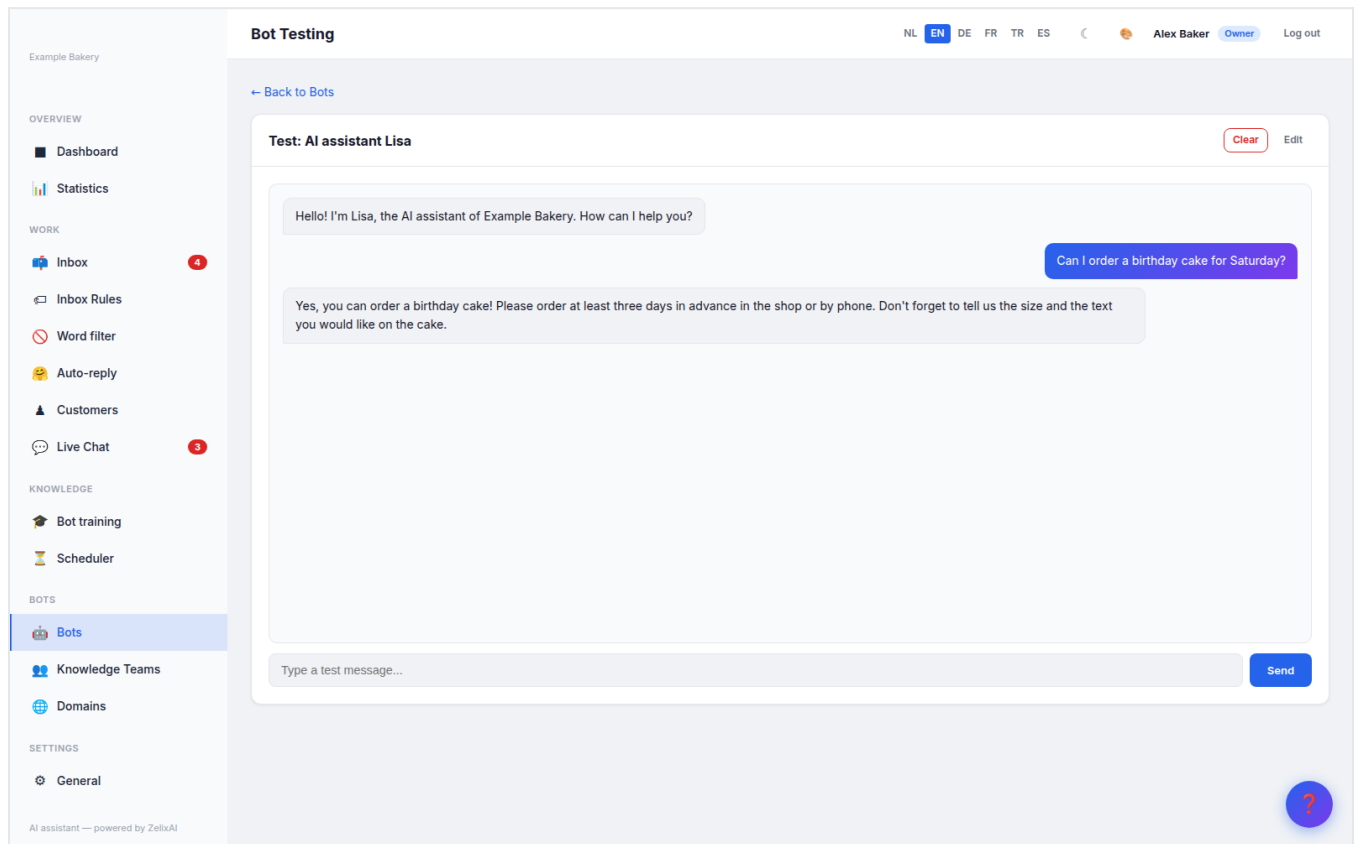
Testing your bot

Test your bot before it is on your website.

1. Go to **Bots > Bots** and click **Test** next to your bot.
2. Ask the questions your customers often ask.
3. Is an answer wrong? Add a question and answer or adjust your instructions. See [teaching your bot](#).
4. Want to start again? Click **Clear**.

With **Preview** you see the chat the way a visitor sees it.

Test conversations use balance too.

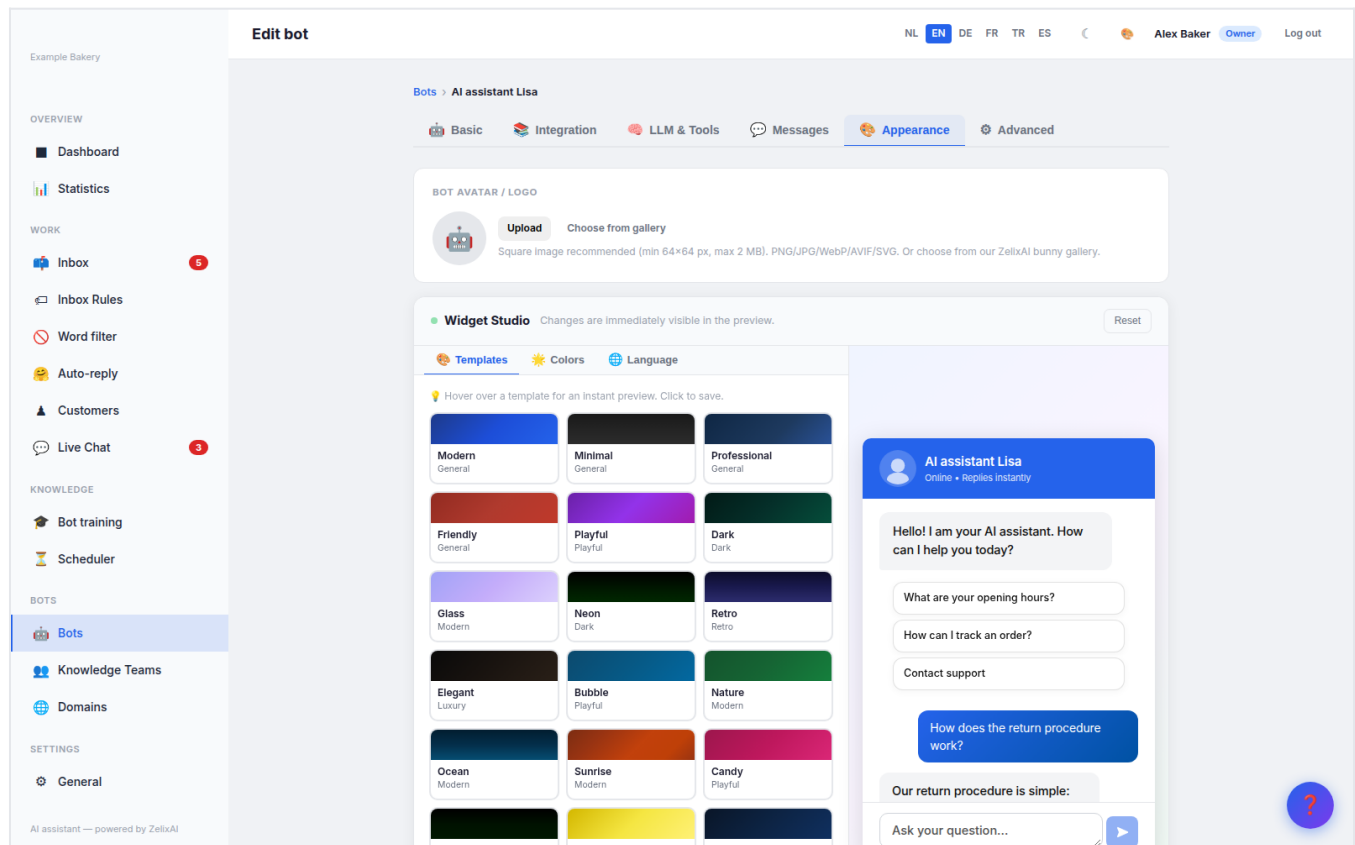


The test page: ask your bot a question the way a customer would.

Putting the bot on your website

1. Choose the look

1. Open your bot (**Bots > Bots > Edit**) and go to the **Appearance** tab.
2. In the **Widget Studio**, choose a template and your colours. You see the result straight away in the preview.
3. If you like, upload your logo as the bot's avatar.

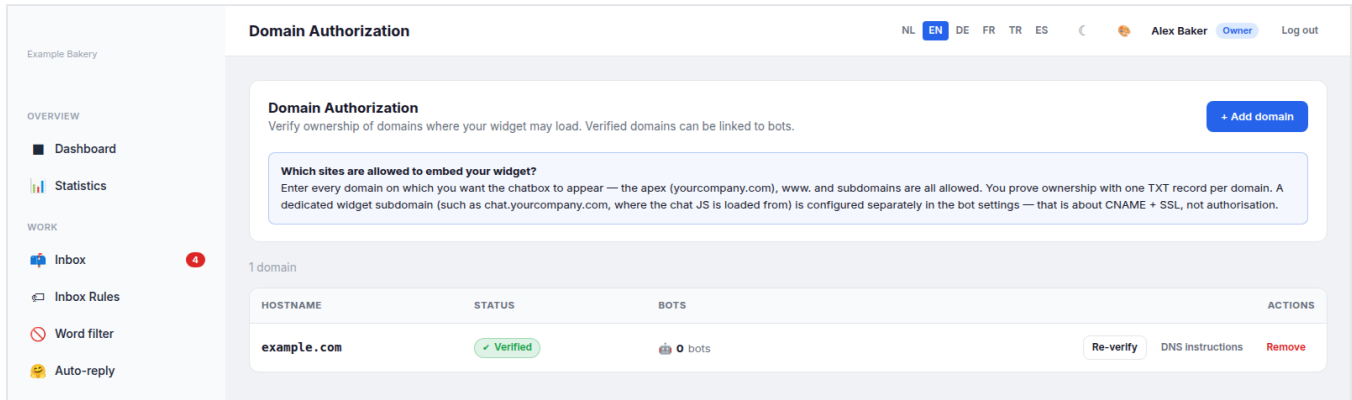


The Appearance tab: template and colours of your chat.

2. Confirm that the website is yours

The chat only works fully on a domain you have confirmed. On a domain that is not confirmed, a visitor can send only 2 messages.

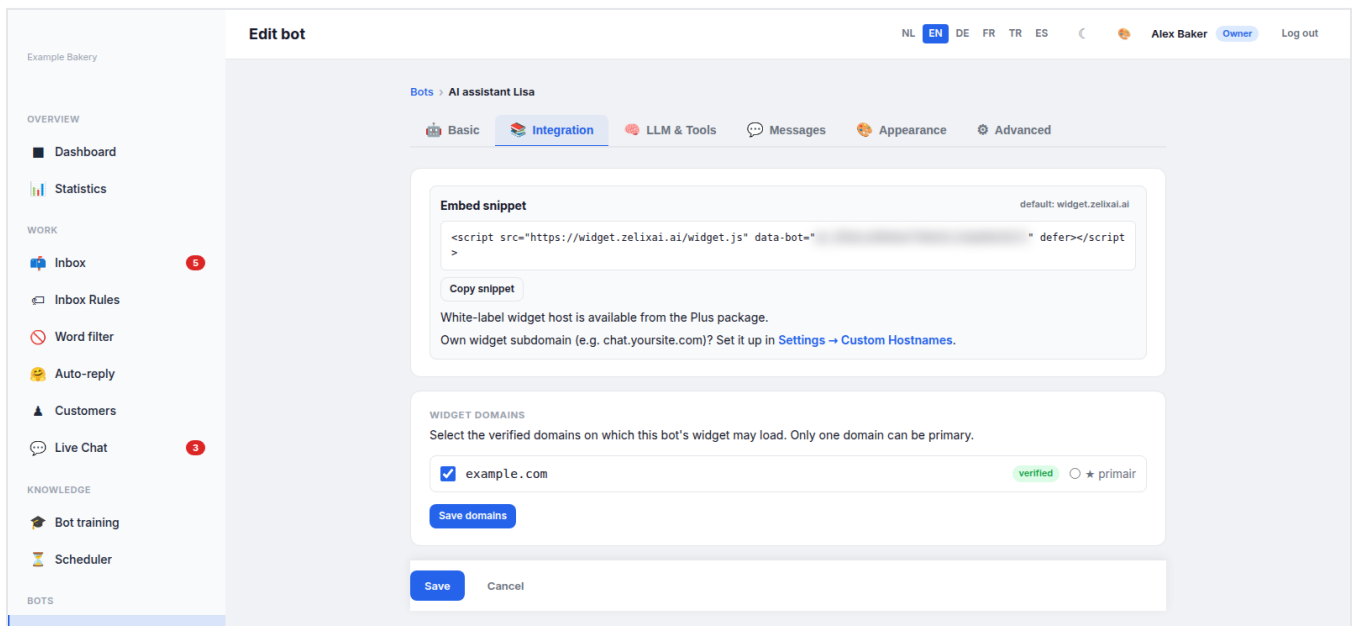
1. Go to **Bots > Domains** and click **+ Add domain**.
2. Enter your domain, for example `yourbusiness.com`, without `https://`.
3. Click **DNS instructions**. You get one TXT record. Add that record at your domain provider. Copy the value exactly.
4. Wait a little (usually 5 to 30 minutes) and click **Verify**. The status changes to **Verified**.



Bots > Domains: your domain is confirmed.

3. Link the domain and place the code

1. Open your bot and go to the **Integration** tab.
2. Under **Widget Domains**, tick your domain and click **Save domains**.
3. Under **Embed snippet**, click **Copy snippet**.
4. Paste the code on every page of your website, just before the closing body tag. This works on any website where you can add your own code, including WordPress: use the place in your theme where you add code to all pages.



The Integration tab: link your domain and copy the code.

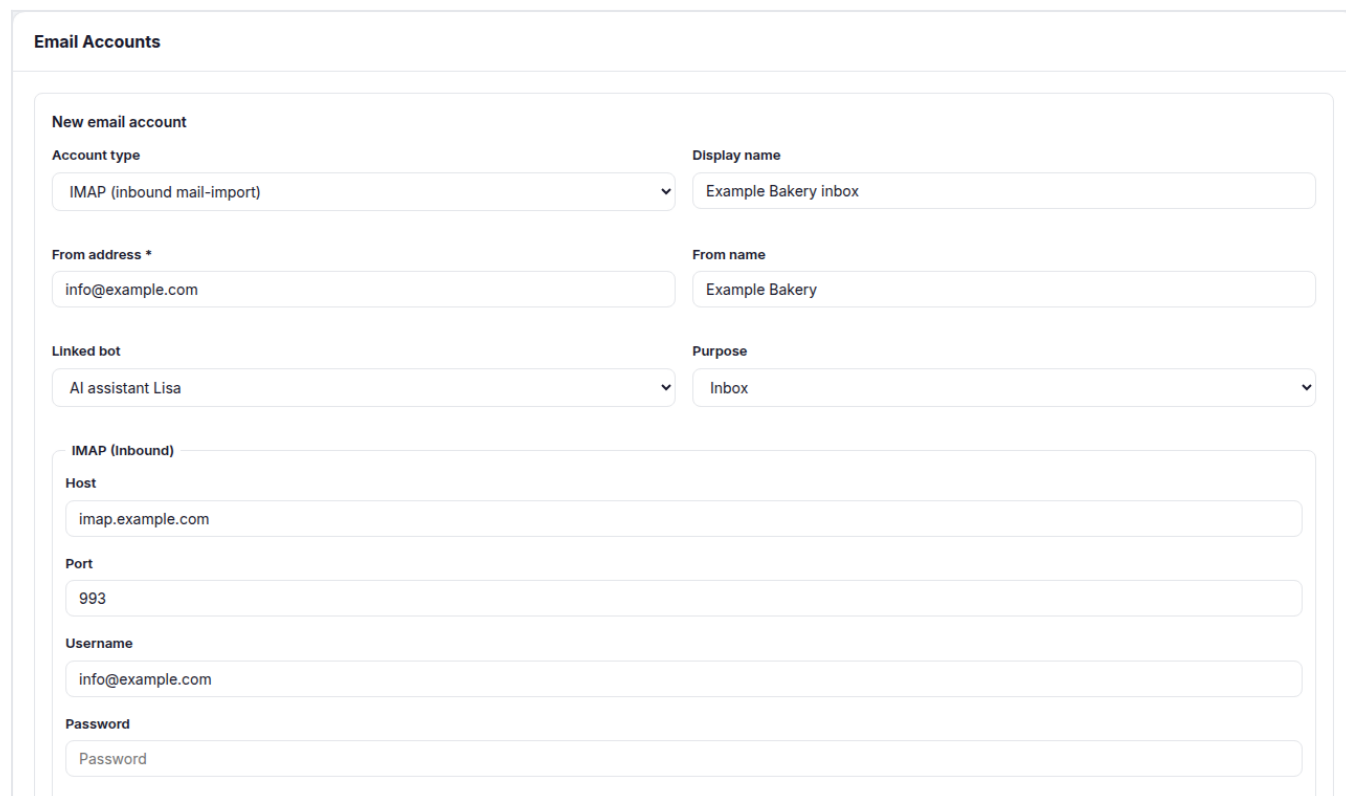
Your support channels

Next to the chat on your website you can connect your e-mail. Everything arrives in **Work > Inbox**.

Connecting e-mail

1. Go to **Settings > Channels** and choose **Email**.
2. Click **+ Add account**.
3. Choose the type **IMAP (inbound mail-import)** and enter the address, for example `info@yourbusiness.com`.
4. Under **Purpose**, choose **Inbox**, and under **Linked bot**, choose your bot.
5. Enter the server details of your mailbox (host, port, user name and password). Your e-mail provider gives you these.
6. Click **Test IMAP connection** and then **Save**.

How many mailboxes you can connect depends on your package. See zelixai.ai/en/pricing.



Email Accounts

New email account

Account type: IMAP (inbound mail-import) ▼

Display name: Example Bakery inbox

From address *: info@example.com

From name: Example Bakery

Linked bot: AI assistant Lisa ▼

Purpose: Inbox ▼

IMAP (Inbound)

Host: imap.example.com

Port: 993

Username: info@example.com

Password: Password

Settings > Channels > Email: connecting your mailbox.

Contact requests

Can the bot not answer a question, or does a visitor want contact? Then the bot asks for an e-mail address or phone number and creates a ticket. You find that ticket in **Work > Inbox** on the **Tickets** tab.

Does your bot have no way to put a visitor in touch with you? Then you see a warning at the top of your bot's page.

When a visitor wants to talk to a person

When a visitor asks for a person, the bot says honestly that it cannot transfer the chat itself. It offers that your team will get in touch. If the visitor leaves an e-mail address or phone number, the bot creates a contact request. You find it under **Work > Inbox > Tickets** (see Following up). The bot never promises a response time.

You can also join a conversation that is still running yourself:

1. Open the conversation in **Work > Inbox**.
2. Click **Take over** at the top right. From then on you reply and the bot no longer does.
3. When you are done, click **Close**.

Visitor (-shots-a1)
guide-shots-a1

Take overAssignClose

CUSTOMER 20 okt 2026, 20:47
Hi! Are you open on Monday?

BOT 20 okt 2026, 20:47
We are closed on Mondays. Our opening hours are Tuesday to Saturday from 8:00 to 17:00.

CUSTOMER 20 okt 2026, 20:47
Do you have gluten-free bread on Saturday?

BOT 20 okt 2026, 20:47
Yes, we bake gluten-free bread on Saturdays!

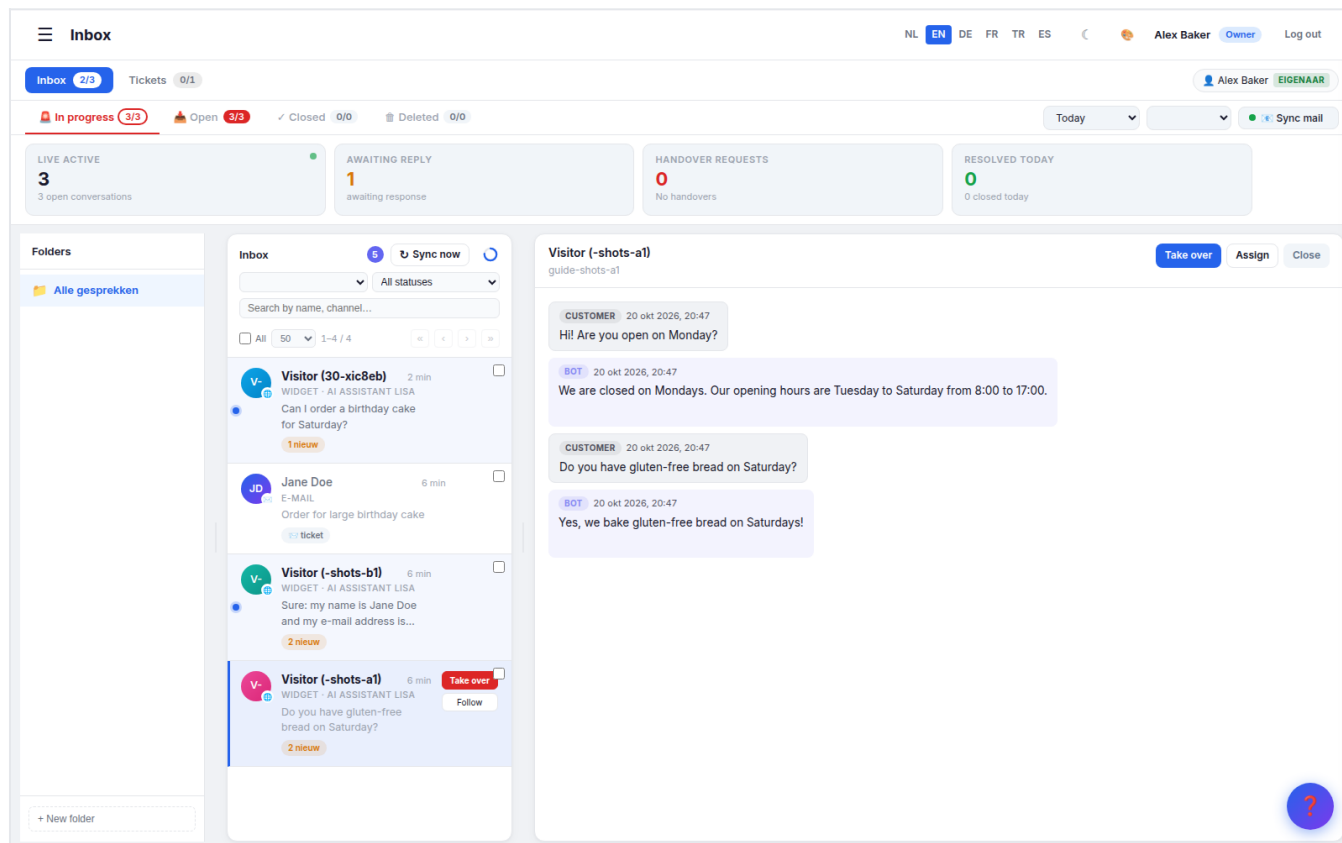
Work > Inbox: Take over hands the conversation from the bot to you.

Following up

Conversations

In **Work > Inbox** you see all conversations of your bot and your e-mail. The tabs **In progress**, **Open** and **Closed** keep things organised.

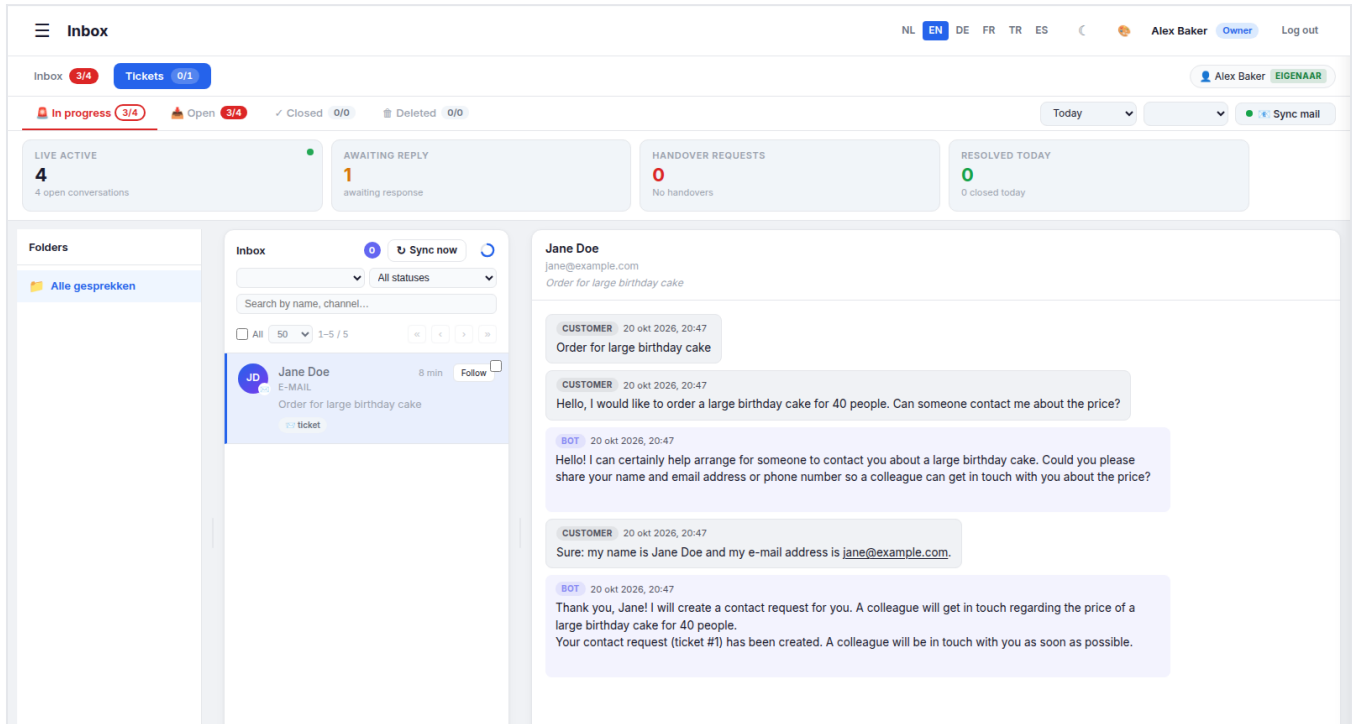
After a finished chat you receive a summary by e-mail by default. You switch this on or off on the **Basic** tab of your bot.



Work > Inbox: all your conversations in one place.

Tickets

Open the **Tickets** tab in the inbox. It lists the contact requests the bot created, with the details the visitor left. Then get in touch with the customer yourself.

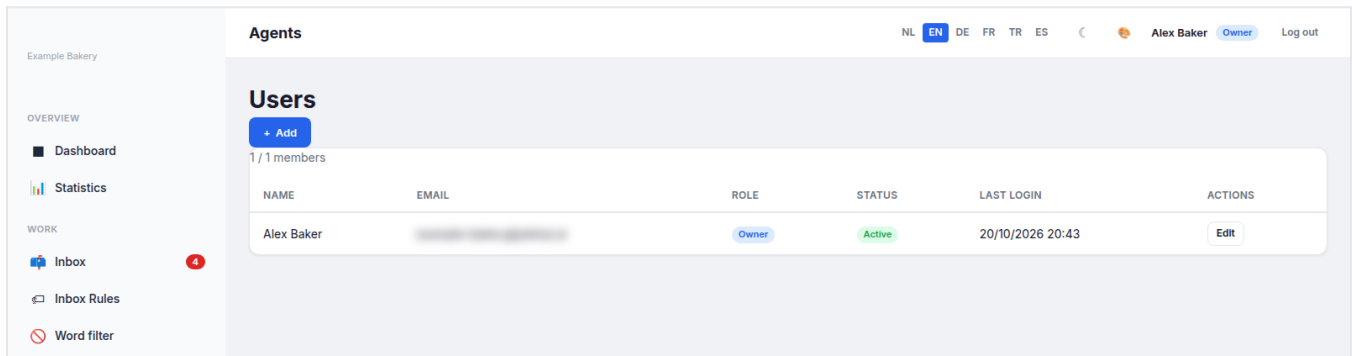


Work > Inbox > Tickets: the contact requests of your visitors.

Adding colleagues

1. Go to **Settings > Users** and click **+ Add**.
2. Enter name and e-mail address and choose a role.
3. After saving you see a temporary password. Pass it on to your colleague yourself.

How many users you can add depends on your package. See zelixai.ai/en/pricing.



Settings > Users: your colleagues.

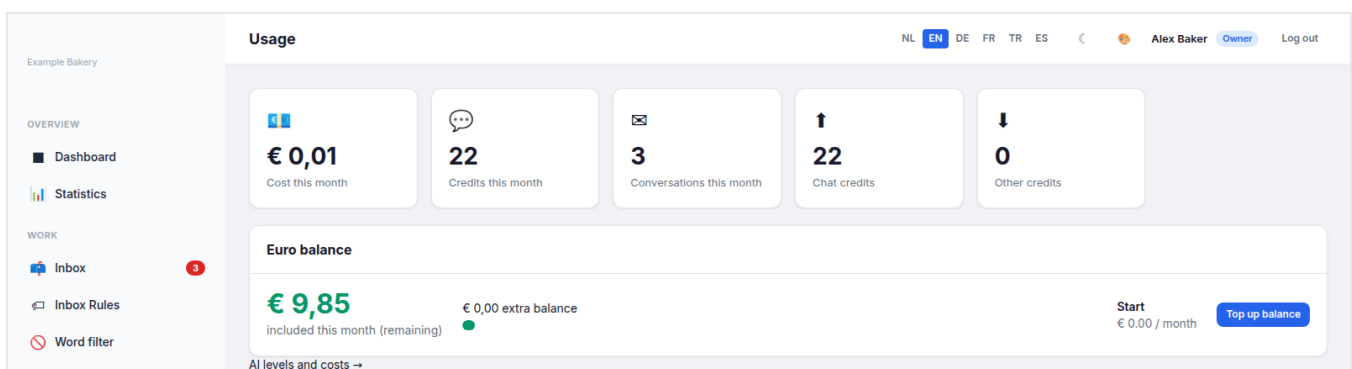
Usage and balance

Your bot runs on balance. Your package includes an amount of balance every month. You can also buy extra balance yourself.

1. Go to **Settings > Usage**. There you see your balance and what your bot uses.
2. Click **Top up balance** to buy extra balance and choose an amount.
3. Would you like your balance to be topped up automatically? When you pay, tick the box to save your payment method and allow automatic balance top-ups.

When your balance runs out, your chatbot stops until you top up. So keep an eye on your usage.

What chatting and reading pages cost is on zelixai.ai/en/pricing.



Settings > Usage: your balance and your usage.

Ready to go live?

Go through this list before you send visitors to your chat.

- ☐ Your bot has a name, a persona and a greeting.
- ☐ Your website has been read and the most important questions and answers are switched on.
- ☐ You have tested the bot with the questions customers often ask.
- ☐ Your domain is **Verified** and linked to your bot.
- ☐ The code is on every page of your website.
- ☐ Your bot can create a contact request: there is no warning at the top of your bot's page.
- ☐ You have enough balance.

Need help?

- In the portal, click the round help button at the bottom right. Our help bot knows the portal and helps you set things up.
- E-mail support@zelixai.ai.
- This guide is also online: zelixai.ai/downloads/zelixai-getting-started-en.pdf.

Good luck with your chatbot!