



dream-genie.ai

v1.8.0

# AI Chatbot

Complete guide to deploying AI chatbots with RAG knowledge base, voice chat, lead capture, and multi-channel support.

---

Version v1.8.0 · March 2026

# Table of Contents

---

1. Chatbot Overview
2. Quick Setup — Your First Chatbot
3. Appearance & Widget Settings
4. Behavior & Personality
5. RAG Knowledge Base
6. Training Documents & URLs
7. Vector Database & Embeddings
8. Voice Chat (Whisper + TTS)
9. Lead Capture & Forms
10. Conversation History & Analytics
11. Multi-Channel (WhatsApp, Telegram, Discord, Slack)
12. Multi-Bot (Agency)
13. File Uploads in Chat
14. Moderation & Safety
15. Embedding via Shortcode & Elementor
16. Free Tier Limits & Upgrading
17. Troubleshooting

## 1

# Chatbot Overview

---

The dream-genie.ai Chatbot is a fully customizable AI assistant that lives on your website. It answers visitor questions using your own content, captures leads, and works across multiple channels — all powered by your choice of AI provider.

Key capabilities:

- **RAG (Retrieval-Augmented Generation)** — trains the bot on your documents, pages, and URLs
- **Voice Chat** — visitors speak questions via Whisper, hear answers via TTS
- **Lead Capture** — collect name/email before or during chat
- **Multi-Channel** — deploy to WhatsApp, Telegram, Discord, Slack (Agency)
- **Multi-Bot** — create separate bots for different sites or purposes (Agency)
- **File Uploads** — visitors can upload images/PDFs for the bot to analyze
- **Moderation** — automatic content filtering and safety guardrails
- **Free Tier** — 100 messages/month on the Free plan, unlimited on paid plans

## 2 Quick Setup

---

Get a working chatbot on your site in under 5 minutes:

1. Navigate to **dream-genie.ai** → **Chatbot** in your WordPress admin.
2. Ensure an API key is configured in **Settings** (any provider works).
3. In the **Appearance** tab, customize the widget color, position, and welcome message.
4. In the **Behavior** tab, write a system prompt describing what the bot should do — e.g., 'You are a helpful customer support agent for [Your Company].'
5. In the **Knowledge Base** tab, add at least one training source (URL, page, or document).
6. Toggle **Enable Chatbot** to ON.
7. Visit your site's frontend — the chat widget appears in the bottom-right corner.

■ **TIP:** The chatbot widget loads asynchronously and doesn't affect your page speed scores (Core Web Vitals).

## 3

## Appearance & Widget

Setting	Options	Description
Widget Position	Bottom-right, Bottom-left	Where the chat bubble appears
Primary Color	Any hex color	Matches header bar, send button, and links
Bot Name	Text	Displayed at the top of the chat window
Bot Avatar	Upload image or emoji	Shown next to bot messages
Welcome Message	Text	First message visitors see when opening chat
Placeholder Text	Text	Ghost text inside the input field
Widget Size	Small, Medium, Large	Controls the chat window dimensions
Auto-Open	On/Off + delay (seconds)	Automatically opens chat after X seconds
Sound	On/Off	Play a sound when a new message arrives
Show on Pages	All / Specific pages / Exclude pages	Control where the widget appears
Mobile Behavior	Show/Hide on mobile	Some sites prefer to hide on small screens

■ **TIP:** Use your brand colors for the primary color — the widget automatically calculates contrasting text colors for readability.

## 4

## Behavior & Personality

The Behavior tab controls how the bot thinks and responds:

Setting	Description
System Prompt	The core instruction that defines the bot's personality, knowledge scope, and rules. This is prepended to every conversation.
Provider / Model	Which AI powers the chatbot. Can differ from the Writer's default.
Temperature	Creativity level (0.0–1.0). Lower = more consistent answers.
Max Tokens	Maximum response length per message.
Context Window	How many previous messages to include (affects cost and relevance).
Fallback Message	What to say when the bot can't answer or an error occurs.
Conversation Starters	Suggested questions shown as clickable chips below the welcome message.

### System Prompt Best Practices

- Start with who the bot is: 'You are a helpful assistant for [Company Name].'
- Define what the bot should and should NOT do: 'Never discuss competitor products.'
- Set the tone: 'Be friendly, professional, and concise.'
- Include company-specific info: 'Our business hours are Mon–Fri 9am–5pm EST.'
- Add escalation instructions: 'If the user asks for a human, provide the email support@company.com.'

## 5

## RAG Knowledge Base

---

RAG (Retrieval-Augmented Generation) is what makes your chatbot smart about YOUR business. Instead of relying solely on the AI's general knowledge, RAG retrieves relevant chunks from your training documents and injects them into the prompt before the AI responds.

### How RAG Works

1. You upload documents, add URLs, or select WordPress pages as training sources.
2. The plugin splits each source into chunks (~500 tokens each) and generates vector embeddings.
3. When a visitor asks a question, the plugin converts their question into a vector.
4. The most relevant chunks are retrieved by cosine similarity search.
5. These chunks are prepended to the AI prompt as context: 'Based on the following information: [chunks]'.
6. The AI generates an answer grounded in your actual content — not hallucinated.

■ **NOTE:** RAG dramatically reduces hallucinations. Without it, the AI might make up product features or prices. With RAG, it answers from your actual documentation.

## 6

## Training Documents & URLs

You can train the chatbot on three types of sources:

Source Type	How to Add	Best For
WordPress Pages/Posts	Select from a dropdown of your content	Product pages, FAQs, About Us, pricing
URLs	Paste any public URL — the plugin scrapes the content	External docs, help centers, partner sites
Documents	Upload PDF, DOCX, TXT, CSV files	Manuals, catalogs, internal knowledge bases

### Managing Training Sources

- **Add Source** — click the + button, select type, provide content.
- **Re-Index** — if you update a page or document, click Re-Index to refresh the embeddings.
- **Remove Source** — delete a source and its embeddings are removed immediately.
- **Chunk Preview** — see how the plugin split your content into chunks.
- **Relevance Testing** — type a test question to see which chunks would be retrieved.

■ **TIP:** Add your most important content first: FAQ pages, pricing pages, product descriptions, and return/shipping policies. These are what visitors ask about most.

## 7 Vector Database

The vector database stores embeddings (numerical representations) of your training content. dream-genie.ai uses a built-in SQLite-based vector store — no external service required.

### Embedding Providers

Provider	Model	Dimensions	Cost
OpenAI	text-embedding-3-small	1536	~\$0.02 / 1M tokens
OpenAI	text-embedding-3-large	3072	~\$0.13 / 1M tokens
Google	text-embedding-004	768	Free tier available

### Vector DB Settings

- **Chunk Size** — default 500 tokens. Smaller chunks = more precise retrieval but more API calls.
- **Chunk Overlap** — default 50 tokens. Overlap prevents cutting sentences mid-thought.
- **Top K Results** — default 5. How many chunks to retrieve per question.
- **Similarity Threshold** — minimum relevance score (0–1). Chunks below this are excluded.

## 8

## Voice Chat

Voice Chat lets visitors speak their questions and hear the bot's answers. It uses OpenAI Whisper for speech-to-text and OpenAI TTS for text-to-speech.

### Requirements

- OpenAI API key configured (Whisper and TTS are OpenAI-only services)
- Visitor's browser must support the MediaRecorder API (all modern browsers do)
- HTTPS required (browsers block microphone access on HTTP)

### Voice Settings

Setting	Options	Description
Enable Voice	On/Off	Show/hide the microphone button
Whisper Model	whisper-1	Speech-to-text model (currently only one option)
TTS Model	tts-1, tts-1-hd	Text-to-speech quality (HD is slower but higher quality)
TTS Voice	alloy, echo, fable, onyx, nova, shimmer	Choose the bot's speaking voice
Auto-Speak	On/Off	Automatically speak bot responses aloud
Language Detection	Auto / Fixed	Auto-detect visitor's language or fix to one language

## 9 Lead Capture

The chatbot can collect visitor information before or during the conversation.

### Lead Capture Modes

Mode	When	Best For
Before Chat	Form appears before first message	High-intent landing pages, sales
After N Messages	Form appears after 2-5 messages	Support sites, less aggressive
On Request	Bot asks for info when relevant	Natural conversation flow
Disabled	No lead capture	Public knowledge bases, documentation

### Captured Fields

- **Name** (optional) — visitor's name
- **Email** (required for lead capture) — visitor's email address
- **Phone** (optional) — phone number
- **Custom Fields** — add your own fields (company, role, etc.)

■ **TIP:** Lead data is stored in your WordPress database and can be exported as CSV. It integrates with AI Flows — trigger a workflow when a lead is captured.

## 10

## Conversation History

---

All chatbot conversations are logged and searchable from the admin panel.

- **Full Transcript** — every message, both user and bot, with timestamps.
- **Search** — full-text search across all conversations.
- **Filter by Date** — see conversations from specific time ranges.
- **Filter by Status** — active, resolved, escalated.
- **Lead Info** — if lead capture is enabled, see the visitor's name/email alongside the chat.
- **Token Usage** — per-conversation API cost tracking.
- **Export** — download conversations as CSV or JSON.
- **Delete** — remove individual conversations or bulk delete by date range.

### Conversation Analytics

- Total conversations, messages, and unique visitors per day/week/month
- Average conversation length (messages and duration)
- Peak usage hours (heatmap)
- Most common topics (extracted from conversations)
- Unanswered questions (where the bot used its fallback message)

## 11

## Multi-Channel

Deploy your chatbot beyond your website. Multi-channel is an Agency-tier feature.

Channel	Setup	Features
WhatsApp	WhatsApp Business API + webhook URL	Text + images, voice messages, read receipts
Telegram	BotFather token + webhook URL	Text, images, inline buttons, groups
Discord	Bot token + channel ID	Text, embeds, slash commands, thread support
Slack	Slack App + OAuth	Text, blocks, thread replies, channel mentions

■ **NOTE:** All channels share the same knowledge base and system prompt — train once, deploy everywhere.

## 12 Multi-Bot (Agency)

---

Agency license holders can create multiple independent bots, each with its own personality, knowledge base, appearance, and channel configuration. Use cases:

- Different bots for different client websites (white-label agency)
- Sales bot vs. Support bot on the same site
- English bot vs. Spanish bot with separate knowledge bases
- Internal team bot vs. public customer bot

## 13 File Uploads in Chat

---

Visitors can upload images and documents directly in the chat. The bot can analyze them using vision-capable models (GPT-4o, Claude Sonnet, Gemini).

- Supported: PNG, JPG, GIF, PDF, DOCX, TXT (max 10MB)
- Images are analyzed visually — the bot can describe what it sees
- PDFs/DOCX are extracted as text and added to the conversation context
- Files are validated server-side with `finfo_file()` — MIME types cannot be spoofed

## 14 Moderation & Safety

---

Built-in safety features protect both your brand and your visitors:

- **Content Filter** — blocks profanity, hate speech, and inappropriate content
- **PII Detection** — warns when visitors share credit card numbers, SSNs, etc.
- **Topic Guardrails** — restrict the bot to only discuss topics you define
- **Rate Limiting** — prevent abuse with per-IP message rate limits
- **Block List** — block specific IPs or email addresses
- **Human Escalation** — detect frustration and offer to connect with a human

## 15

## Embedding Options

---

Three ways to add the chatbot to your pages:

### 1. Floating Widget (Default)

The default — a chat bubble in the corner of every page (or selected pages). No code needed, just toggle Enable Chatbot to ON.

### 2. Shortcode

Embed an inline chat window inside any page or post content:

```
[dreamgenie_chatbot height="500px" width="100%"]
```

### 3. Elementor Widget

Drag the **DreamGenie Chatbot** widget from the Elementor panel into your page. Configure height, width, and style from the widget settings.

## 16

## Free Tier & Limits

Feature	Free	Starter	Pro	Agency
Messages/month	100	Unlimited	Unlimited	Unlimited
Knowledge sources	3	10	50	Unlimited
Voice Chat	—	✓	✓	✓
Lead Capture	✓	✓	✓	✓
Multi-Channel	—	—	—	✓
Multi-Bot	—	—	—	✓
File Uploads	—	✓	✓	✓
Conversation Export	—	✓	✓	✓

## 17

# Troubleshooting

Symptom	Cause	Fix
Widget doesn't appear	Chatbot not enabled or page excluded	Check Settings → enable and page visibility rules
Bot says 'I don't know'	No relevant knowledge base content	Add more training sources covering that topic
Slow responses	Large context window or slow model	Reduce context window size or use a faster model
Voice not working	No OpenAI key or HTTP site	Add OpenAI key and ensure HTTPS site
Messages cut off	Max tokens too low	Increase max tokens in Behavior settings
Wrong language	System prompt not specifying language	Add 'Always respond in English' to system prompt
Rate limit errors	Too many visitors chatting	Upgrade plan or use a model with higher rate limits