

AI FrontDesk Pro Customer Guide



Welcome to AIFrontDesk Pro



Your AI Chatbots & Dashboard Guide

AIFrontDesk Pro gives you powerful, customizable AI chatbots to engage customers, capture leads, and streamline support. This guide shows you how to manage your bot and dashboard effectively.

Getting Started

- Sign up using the onboarding link provided by AIFrontDesk Pro (this creates your own sub-account).
- Go to: app.aifrontdesk.co
- Log in to your dashboard using your login credentials
- Create your AI Chatbot and add prompts to guide its responses and personality.
- Add FAQs, documents, and website links to train your bot.

Prompting and Training Options – Customers can either write prompts and train the chatbot themselves, or our team can handle prompt creation and training on their behalf.

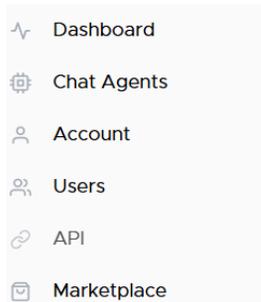
Prompting & Training Support is FREE – provided at no additional cost.

- Test your bot and adjust prompts until it's ready.
- Customize appearance and connect it to your channels.

◆ Key Features of Your AI Chatbot

To Create or Edit a Chatbot:

1. Go to the **Chat Agents** section in the left panel.



2. Click **Create Chatbot** to set up a new AI chatbot.
3. To update an existing chatbot, select the one you want to modify, click the  icon, and choose **Edit**.
4. You can then review all available features and make changes as needed.

Key Features:

1. **24/7 Client Support** – Respond instantly to inquiries on your website or connected channels.
2. **Adjusting Chatbot Settings** - Customize your chatbot's name, display name, and AI model preferences to match your business needs. In this section, you can:
 - **Name / Display Name:** Set how your chatbot is identified internally and how it appears to users.
 - Choose the **Primary** and **Alternative Model** (e.g., GPT-4o or GROK-2).
 - Add **Tags** to categorize your chatbot's purpose (like *Lead Generation* or *Appointment Scheduling*).
 - Set the **Temperature** to control creativity — lower values make responses more factual, higher values make them more flexible.
 - Define your **Support Email**, so users know how to reach your team.

Chat Agent Analytics Settings Knowledge Base Leads Scheduling Beta Conversations Appearance Integrations

General Message Rate Limits New

Chat Agent Settings

Name * **Display Name ***

Primary Model **Alternative Model**

We recommend GPT-4o (2024-11-20) for most use cases.

Tags **Support Email**

Temperature * **Knowledge Base Search Results**

Select how many knowledge base results to include as context.

3. Prompt Customization – Shape the bot’s tone, style, and professionalism to fit your brand.

- **Base System Prompt** : Define your Chat Agent's personality, knowledge, and behavior through custom instructions
- **Conversation Starter/Suggested Messages** : Predefined clickable messages for user prompts.
- **Initial Messages/Popup Messages** : The first message(s) your chatbot will send to users. These messages will be also displayed as popup messages on the chat bubble.

Base System Prompt * [FAQs](#) | [Reset](#)

```
# AAIH Virtual Assistant – Chatbot Prompt

## Agent Role
You are **AAIH's Virtual Assistant**.
You respond politely, clearly, and concisely to questions about:
- AAIH's mission
- Membership
- Insights
- Publications
- Events
- Podcast
- Book
- Contact information

You help visitors find what they need, guide them to the correct pages, and encourage them to subscribe, connect, or get involved. Total Characters: 3906
```

Conversation Starter / Suggested Messages

I want to become an AAIH Member
I want to contribute to AAIH Articles
How can I participate in AAIH podcast?

Initial Messages / Popup Messages

Welcome to Alliance for AI & Humanity. How can I help you?

4. Knowledge Base – Add text, FAQs, documents, or website URLs (the bot automatically scrapes and learns from them), so your bot gives accurate, business-specific answers.

- **Text** : Paste or type any text content you want to use for training the AI. Then click: “Train Chat Agent”

- **Files** : Upload your documents and files to train the AI. Supported formats include pdf, txt, doc, docx, md files. Then select the files and click : “Train/Re-Train Chat Agent”

- **Q/A** : Upload a CSV file containing your questions and answers. Each row should contain a question in the first column and its corresponding answer in the second column.

	A	B
1	What is your name?	My name is John.
2	What is your favorite color?	My favorite color is blue.
3	How old are you?	I am 25 years old.
4	What is your hobby?	My hobby is reading.
5		
6		
7		

- **Website** : Enter the URLs you want to scrape and use to train the bot. Configure the setting accordingly. After that, click : “Save and Scrape URLs”

Scrape Website URLs
Enter the URLs you want to scrape and configure the settings below. You can scrape multiple URLs by entering them on separate lines.

Website URLs

https://www.aaih.sg/

Max URLs to Scrape
250

Basic Options

- Scrape only the entered url (do not follow links)
- Auto-scrape daily
- Ignore Headers
- Extract main content only

Advanced Options

Save Settings Save and Scrape URLs

- **Scraped URLs:** The scraped URLs are shown in this section. You can select the URLs you want, and train your bot

Scraped URLs Re-crawl Delete

Select All (172) All UrIs Alphabetical (A-Z) Search URLs...

Scraped: October 1st 2025	<input checked="" type="checkbox"/> https://www.aaih.sg/	4,153 characters	🔍 🗑️
Scraped: October 1st 2025	<input checked="" type="checkbox"/> https://www.aaih.sg/_wp_link_placeholder	309 characters	🔍 🗑️
Scraped: October 1st 2025	<input checked="" type="checkbox"/> https://www.aaih.sg/a-review-of-recent-deep-learning-approaches-in-human-centered-machine-learning-dr-suranga-nanayakkara	125,523 characters	🔍 🗑️
Scraped: October 1st 2025	<input checked="" type="checkbox"/> https://www.aaih.sg/aaih-fellow-sudhir-tiku-to-speak-at-momentum-ai-2024-singapore	418 characters	🔍 🗑️
Scraped: October 1st 2025	<input checked="" type="checkbox"/> https://www.aaih.sg/aaih-new-partner-organization-of-the-institute-and-for-ispcc-conference		🔍 🗑️

Total URLs: 172 373,288 characters selected

Trained Characters (All Data Sources): 405,837

Re-Train Chat Agent

- **KB Search** : Enter a query to see what data the AI can reference from your knowledge base, for testing purposes.

Knowledge Base Search

Type your search query below to view relevant information from the knowledge base. Results show exactly what data will be accessible to the AI assistant when processing your request.

What is AAIH?

Chatbot successfully answered.

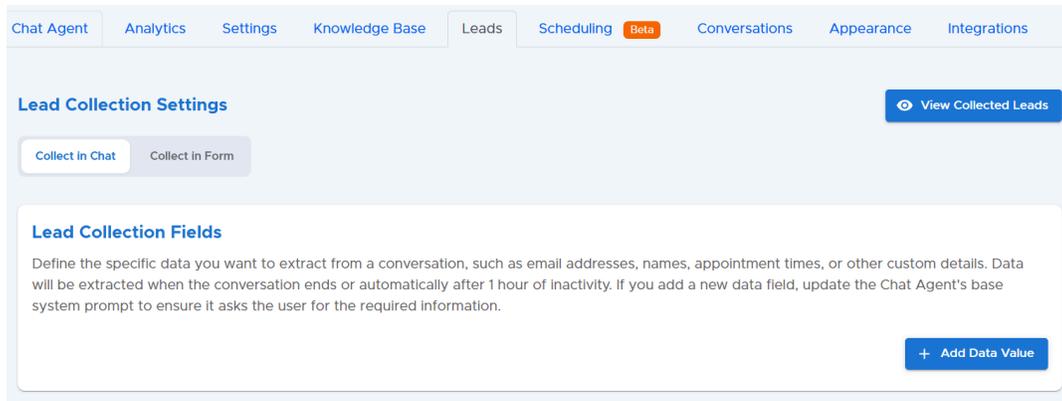
Results:

Data File 88.367%

Q: What is AAIH? A: The Alliance for AI & Humanity (AAIH) is a not-for-profit organisation dedicated to promoting Responsible AI development and deployment worldwide. AAIH brings together experts, academics, policymakers, and thought leaders to advance AI that benefits humanity. Q: How can I become an AAIH member? A: You can join AAIH by filling out our membership form on the website <https://www.aaih.sg/corporate-membership/>. Members gain access to exclusive networking, thought leadership, publications, and opportunities to shape the future of Responsible AI. Q: Where do I find the membership form? A: Please visit our Membership Page to register your interest. <https://www.aaih.sg/corporate-membership/> Q: What is AAIH Insights? A: AAIH Insights is our bi-weekly newsletter and Op-Ed series published on LinkedIn, Substack, and Medium. It features expert perspectives, news, and developments

899 chars, 200 tokens FAQ_AAIH_Oct01.docx

5. **Leads Capturing** – Allows your chatbot to automatically collect key customer information such as names, emails, phone numbers, during conversations or before a chat starts.



The screenshot shows a dashboard with a navigation bar at the top containing tabs for Chat Agent, Analytics, Settings, Knowledge Base, Leads, Scheduling (Beta), Conversations, Appearance, and Integrations. The 'Leads' tab is active. Below the navigation bar, there is a section titled 'Lead Collection Settings' with a 'View Collected Leads' button. Underneath, there are two toggle buttons: 'Collect in Chat' (selected) and 'Collect in Form'. Below these is a section titled 'Lead Collection Fields' with a descriptive paragraph: 'Define the specific data you want to extract from a conversation, such as email addresses, names, appointment times, or other custom details. Data will be extracted when the conversation ends or automatically after 1 hour of inactivity. If you add a new data field, update the Chat Agent's base system prompt to ensure it asks the user for the required information.' At the bottom right of this section is a '+ Add Data Value' button.

There are **two ways to capture leads**:

- **Collect in Chat:** The chatbot asks questions naturally during a conversation to gather information.
- **Collect in Form:** A customizable form appears before the chat begins to collect user details.
 - You can personalize the form's appearance using the **“Customize Style”** option with CSS to match your brand look.

How to Configure Lead Capturing

- Go to the **Lead Collection Settings** tab in your Chat Agent dashboard.
- Choose your preferred collection method — **Collect in Chat** or **Collect in Form**.
- Under **Lead Collection Fields**, click **Add Data Value/ Add Field** to define which details to collect (e.g., Name, Email, Phone).
- Update your chatbot's **Base Prompt** to include lead-collection instructions so the AI knows to ask for these details during chats. Example:

Data Collection Instructions:

After you have collected all of the data from the user: `{{{leads}}}`, call the `send_notification_about_lead_collection()` function.

Lead Notifications

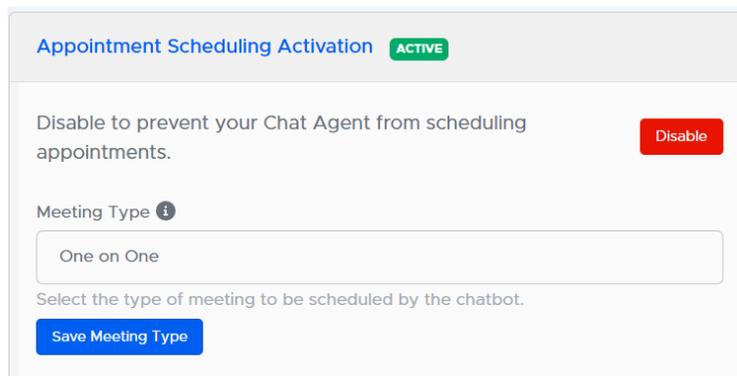
You can choose how to get notified when new leads are collected:

- **Email Notifications:** Add one or more email addresses to receive instant alerts for every new lead.
- **Webhook URL:** Add a webhook endpoint to automatically send lead data to your CRM or any other system via HTTP POST.

6. **Scheduling** – Allows your chatbot to automatically manage meeting bookings, helping customers schedule appointments without manual effort

Key Configuration Steps

- **Appointment Scheduling Activation**
 - Toggle this on to enable booking through your chatbot.
 - Select a **Meeting Type** (e.g., *One-on-One*) and click **Save Meeting Type**.



The screenshot shows a configuration panel titled "Appointment Scheduling Activation" with a green "ACTIVE" status indicator. Below the title, there is a text label "Disable to prevent your Chat Agent from scheduling appointments." and a red "Disable" button. Underneath, the "Meeting Type" is set to "One on One" in a dropdown menu, with an information icon to its left. A note below the dropdown reads "Select the type of meeting to be scheduled by the chatbot." and a blue "Save Meeting Type" button is positioned at the bottom left of the panel.

- **Define Availability**
 - Set your **Timezone** and preferred **Appointment Duration**.
 - Choose your working days and hours — this determines when customers can book meetings.

Define Availability

Set your Timezone: UTC

Set your Appointment Duration: 15 Minutes

Set your weekly working hours

<input checked="" type="checkbox"/>	Monday	08:00 AM	05:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Tuesday	08:00 AM	05:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Wednesday	08:00 AM	05:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Thursday	08:00 AM	05:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friday	08:00 AM	05:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Saturday	08:00 AM	05:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Sunday	08:00 AM	05:00 PM	<input type="checkbox"/>	<input type="checkbox"/>

[Save Weekly Schedule](#)

- **Calendar Integration**

- Connect your **Google Calendar** to sync all scheduled appointments automatically.
- (Currently, only Google Calendar is supported. For Outlook or other systems, you can connect via webhook — see below.)

Calendar Integration

 [Connect your Google Calendar](#) [Connect](#)

- **Appointment Scheduling Webhook URL**

- Enable this option if you want appointment data to be automatically sent to another system (like a CRM or Outlook calendar).
- Add your **Webhook URL**, and the system will push booking details each time a new appointment is made.

Appointment Scheduling Webhook URL

Enable Outgoing Appointment Scheduling Webhook ⓘ
[View History and Test](#)

Appointment Scheduling Webhook URL

When a new appointment is scheduled, we will send an HTTP request, with JSON data to this URL.

Include Collected Leads Data ⓘ

[Save](#)

- **Appointment Scheduling Email Notification**
 - Enable this option to receive instant email alerts whenever a new appointment is booked.
 - Click **View Previously Sent Emails** to review past notifications.

Appointment Scheduling Email Notification

Enable Appointment Scheduling Email Notification ⓘ
[View Previously Sent Emails](#)

Appointment Scheduling Email Notification

When a new appointment is scheduled, we will send an email to this email address.

[Save](#)

- **Appointment Scheduling Title**
 - Use this option to customize the **event title** that appears in your calendar when an appointment is created.

Appointment Scheduling Title

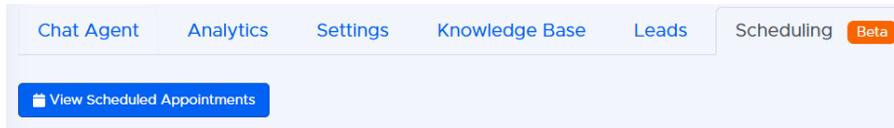
Customize Appointment Title ⓘ

Appointment Title

Title that will appear on the calendar for the appointment.

[Save](#)

- **View Scheduled Appointments**
 - Click **View Scheduled Appointments** to monitor all confirmed bookings directly from your dashboard.



- **Appointment Scheduling Prompt**
 - You can customize how your chatbot handles appointment scheduling through the **Base System Prompt**.
 - This prompt defines how the AI should interact when users want to book meetings, for example, by asking their timezone, checking availability, and confirming appointments.
 - You can edit the **Base System Prompt** to match your specific scheduling process or tone.
 - Always enable the **"Are you sure you want to edit"** option before making changes.
 - Save your customized scheduling prompt to align with your overall chatbot prompt in the **Chat Agent's Base Prompt** section.

⚠ Warning: Only modify the base prompt if you fully understand its logic—incorrect edits may affect scheduling functionality.

Appointment Scheduling Base System Prompt

Are you sure you want to edit the base system prompt?

Base System Prompt *

You are an appointment scheduling bot that answers questions. You will always prompt the user to see if they want to schedule an appointment.

How to schedule an appointment:

When the user wants to schedule an appointment you will ask them what timezone they are in. Then you will use the `get_available_times`, passing the user's timezone converted by you to a valid IANA Time Zone string, to get the available times for the agent.

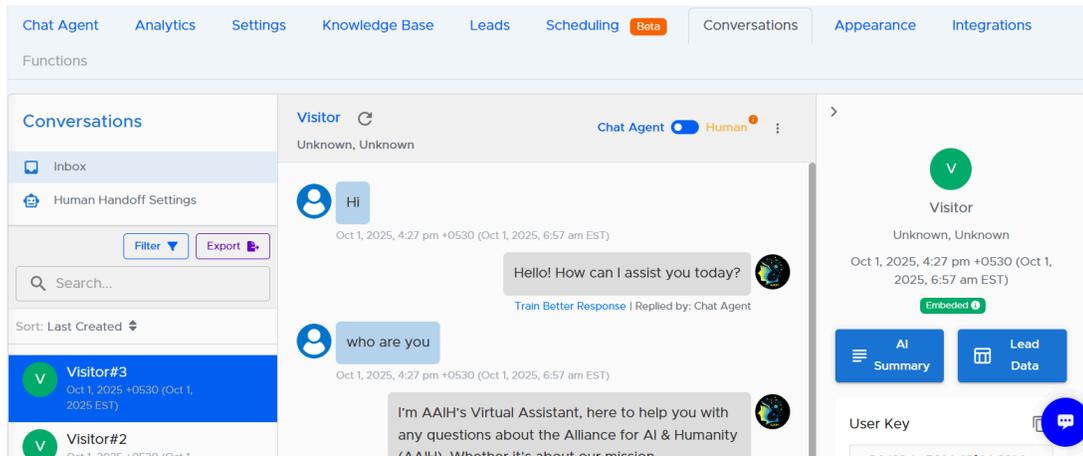
Example call:
`get_available_times(timezone="America/Los_Angeles")`

WARNING: **Entertain the user most recent query first and Do not

WARNING: Do not modify unless you understand what you are doing.

Reset
Save

7. Conversations – Track conversations, users, and leads in real time.



- **Inbox** – Displays all active and past conversations with visitors.
- **Chat Toggle (Chat Agent / Human)** : Switch between **AI** and **Human** responses. When “Human” mode is enabled, a team member can manually take over the chat.
- **Train Better Response** : Click this option under any AI reply to refine or improve the chatbot’s future responses.
- **AI Summary & Lead Data** : Quickly view summarized chat insights and any lead details collected during the conversation.
- **Filter & Export** : Use filters to sort chats or export them for record-keeping and analysis.

8. Live Handoff – Seamlessly transfer chats to your team when needed.

- **Trigger Settings** : Define specific **keywords or phrases** that trigger the handoff (e.g., “STOP”, “Unsubscribe”, “Talk to human”). Once the chatbot detects these, it pauses and routes the chat to a human agent.

Trigger Settings
When these words are detected, the AI pauses and hands off to a human.

Handoff Keywords And Phrases

STOP Unsubscribe Unsub Talk to human

Keyword/Phrase
Enter keyword and press enter

- **Handoff Response** : Customize the **final message** your chatbot sends before handing the conversation over (e.g., *“Transferring you to a human agent...”*).

Handoff Response
Customize the message your AI agent sends before transferring the conversation to a human agent

Chat Agents' Final Message

Handoff Message
Transferring to a human...

- **Human Handoff Available Hours** : Set when the handoff feature is active:
 - **24/7 Mode**: Always available.
 - **Scheduled Mode**: Enable only during specific hours (e.g., support hours).

Human Handoff Available Hours

Human handoff is enabled 24/7 All time Scheduled

- **Notification Settings** : Configure how team members are alerted when a handoff happens:
 - **Email Notifications**: Enter one or more email addresses to get notified when a chat needs attention.
 - **Reminder Time**: Set how long after the trigger the reminder email should be sent.
 - **Webhook**: Add a URL to automatically send handoff data to an external system (like Slack, CRM, or ticketing software).

Notification Settings

Configure where to send notifications when a conversation requires human attention

Email Notifications Not Configured

Email Reminder Time

Webhook [View History](#)

Webhook URL

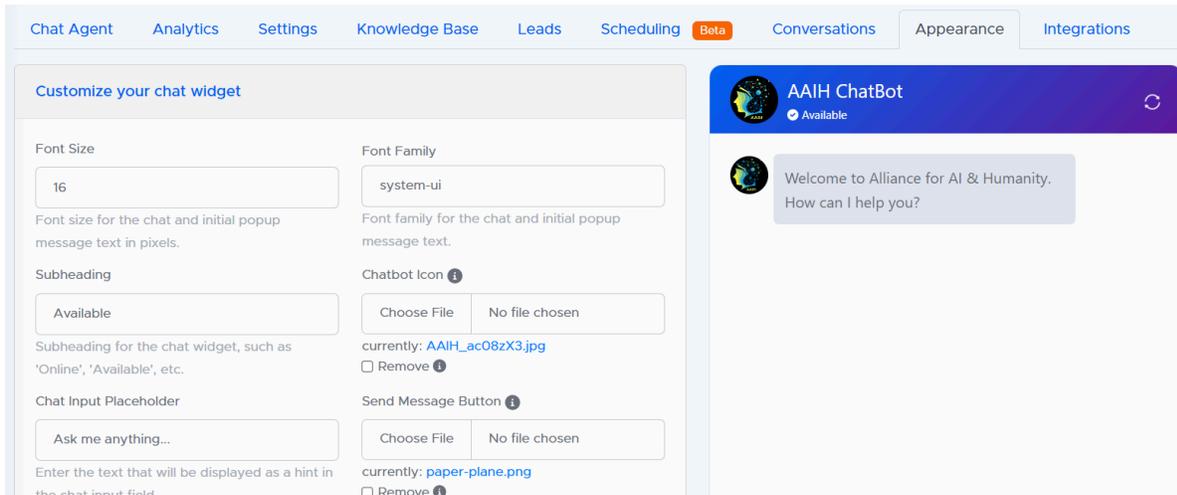
- Platform Integration : Enable or disable human handoff for each communication channel. Available options include:
 - **Chat Widget**
 - **WhatsApp**
 - **Instagram**
 - **Facebook**
 - **API (for custom integrations)**

Platform Integration

Enable or disable human handoff functionality for each messaging platform

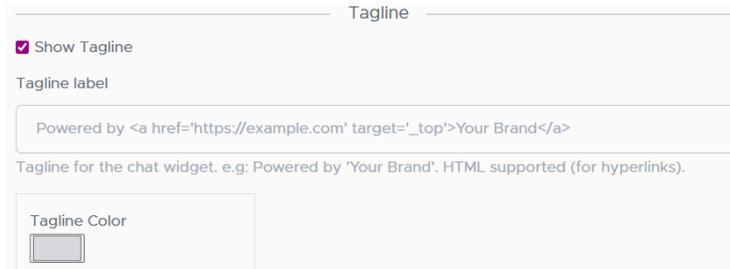
 Chat Widget	<input type="checkbox"/>
 WhatsApp	<input type="checkbox"/>
 Instagram	<input type="checkbox"/>
 Facebook	<input type="checkbox"/>
 API	<input type="checkbox"/>

9. Branding & Settings – allows you to fully customize how your chatbot looks and feels to users. You can adjust the design, colors, and behavior of the chat widget to match your brand's identity. You can also **see a live preview and test your chatbot on the right-side panel** to understand how your changes appear in real time.

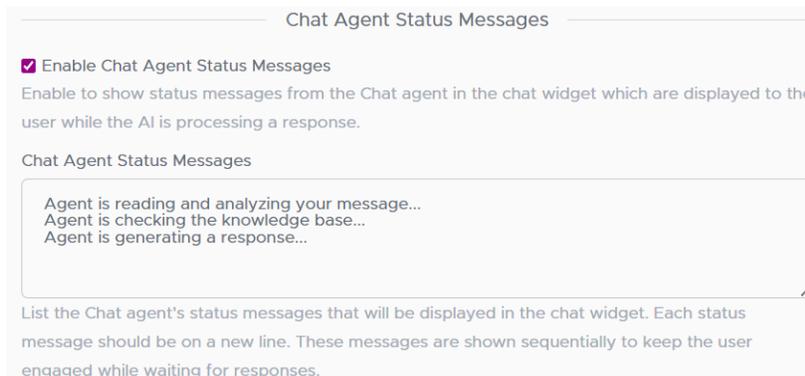


- **Customize your chat widget:** Change basic visual and text settings such as font size, font family, chatbot icon, and message button style.
- **Widget UI:** Modify the color of the chat title and chat input text to match your brand theme.
- **User messages:** Adjust the background and text color for messages sent by users in the chat.
- **AI response messages:** Customize the background and text color of the chatbot's responses.
- **Other Colors:** Set gradient colors for the chat header and hyperlink color to enhance the visual appeal.
- **Widget border:** Define the border radius and border color to give your widget a rounded or sharp-edge look.
- **Widget Background:** Choose the widget background color or preference to match your website's design.
- **Input Background:** Customize the color of the area where users type their messages.
- **Response Typing Speed:** Enable typing simulation and adjust how quickly the chatbot appears to respond.

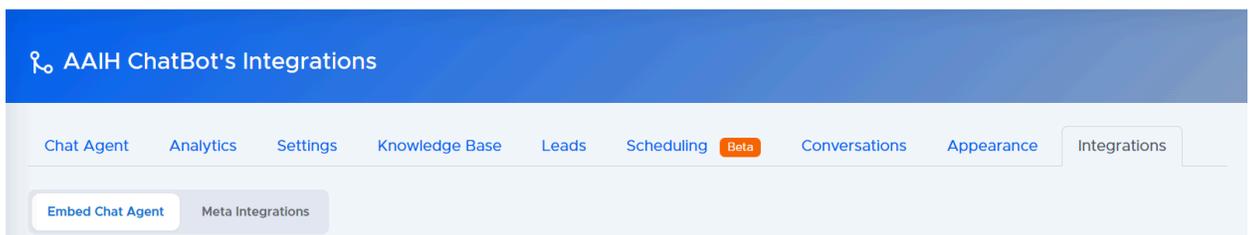
- **Tagline:** Add a small tagline (e.g., “Powered by Your Brand”) below the chat window, including links if desired.



- **Embedded Widget Size:** Control the size of the chat widget when it’s embedded on your website (e.g., small, medium, or large).
- **Chat Icon:** Set icons and avatars for the chatbot and user, and define the chat bubble color.
- **Chat Agent Status Messages:** Show live status updates (e.g., “Agent is reading your message...”) while the chatbot processes user input.



10. Multi-Channel Support – The **Integrations** tab allows you to connect your chatbot with websites and external platforms for seamless interaction.



A. Embed Chat Agent

- Use this option to **embed your chatbot** on your website via iframe or a code snippet.
- Click “**Get Embeddable Code**” to generate the script.

- Adjust key settings:
 - **Chatbot Visibility:** Choose whether the bot is public or private.
 - **Widget Bubble Position:** Select where the chat bubble appears (e.g., bottom right).
 - **Popup Message Display Settings:** Control how often initial popups show (e.g., show once).
 - **Auto-Refresh Conversation:** Maintain or reset conversation context after inactivity.

B. Chat Widget Settings

- Customize **desktop** and **mobile** chat experiences separately.
- Enable or disable **popup messages** for first-time visitors.
- Edit **initial greeting messages** that appear when users open the chat.
- Adjust **popup delay timing** to control when the bot's message appears.

C. Meta Integration

- Instantly connect your chatbot with **Meta platforms** for broader communication:
 - **Facebook Messenger**
 - **WhatsApp**
 - **Instagram**

- Clicking **Connect** initiates the setup process for each platform to sync conversations directly from your chatbot.

Embed Chat Agent [Meta Integrations](#)

Meta Integrations

 **Facebook Messenger**
Instantly connect Facebook Messenger with your Chat Agent [Connect](#)

 **WhatsApp**
Instantly connect WhatsApp with your Chat Agent [Connect](#)

 **Instagram**
Instantly connect Instagram messenger with your Chat Agent [Connect](#)

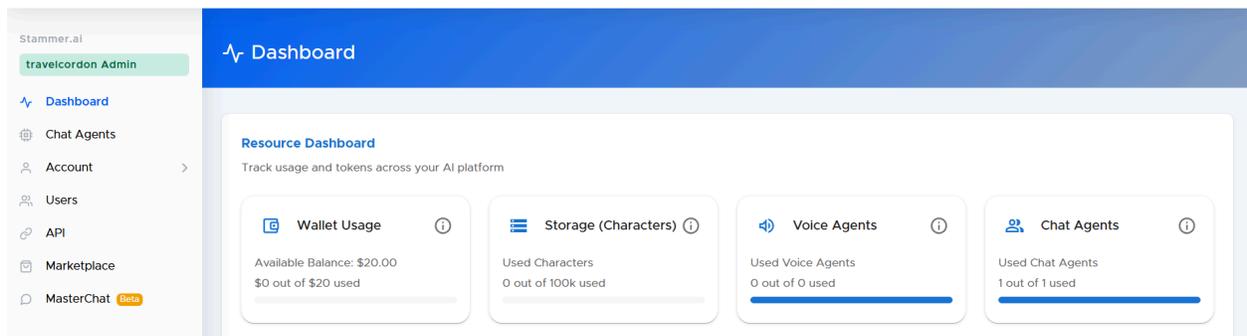
◆ Your AI Chatbot Dashboard

The **Dashboard** is your central hub for managing AI chatbots, tracking usage, and monitoring performance. It gives you a complete overview of your account, resources, and activity in one place.

Key Sections

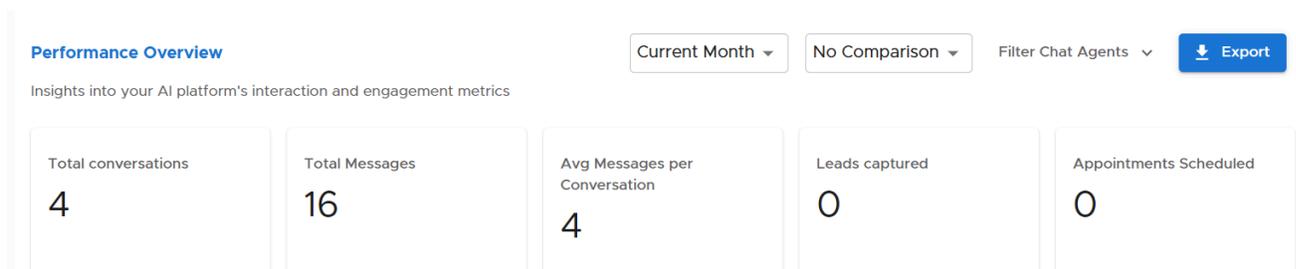
1. Resource Dashboard

- **Wallet Usage** – Track your available balance and spending.
- **Storage (Characters)** – Monitor how many characters are used in your AI chatbots' knowledge base.
- **Voice Agents & Chat Agents** – Check usage and quotas for your active agents.



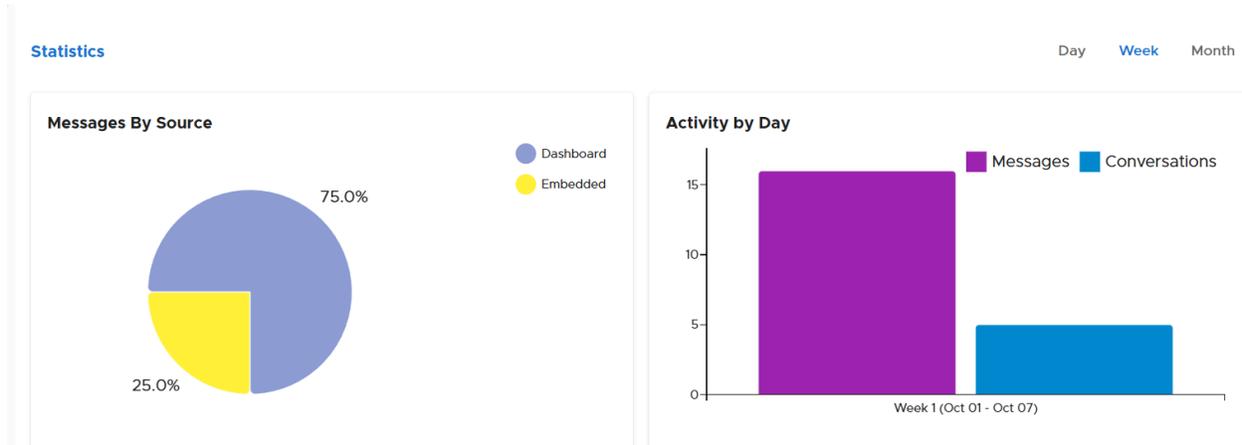
2. Performance Overview

- View insights such as:
 - Total conversations & messages
 - Average messages per conversation
 - Leads captured
- Filter by **date range** (day, week, month) and compare performance across time.



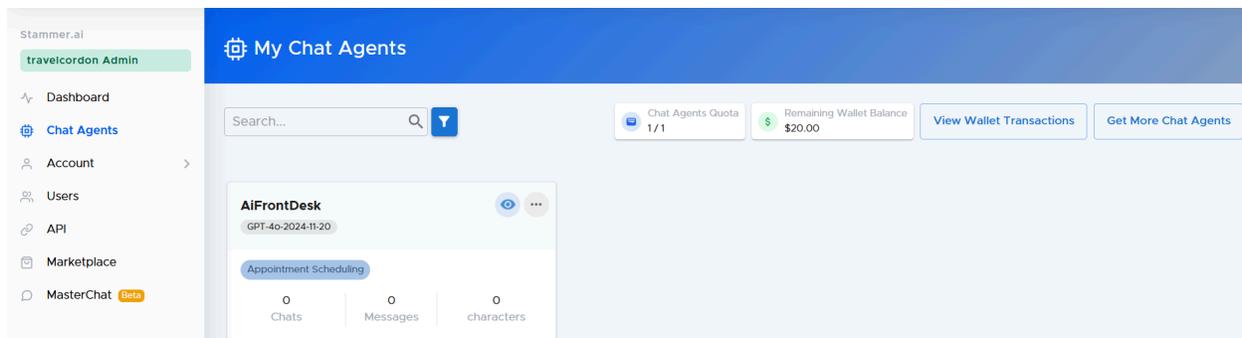
3. Statistics

- **Messages by Source** – Understand where conversations are happening (web, social, etc.).
- **Activity by Day** – Track conversation and message trends over time.
- **Chats by Country** – See where your users are engaging from.



4. Chat Bots Management

- Create and manage your chat bots.
- Access quota limits and wallet balance.
- Upgrade or purchase additional chat bots directly from here.



5. Account Management

- **Profile** – Update personal details, timezone, and notification preferences.
- **Notifications** – Set up daily, weekly, or monthly email/webhook updates for conversation counts, wallet balance, and usage.

- **Security** – Change passwords and enable two-factor authentication for extra protection.

6. Subscriptions

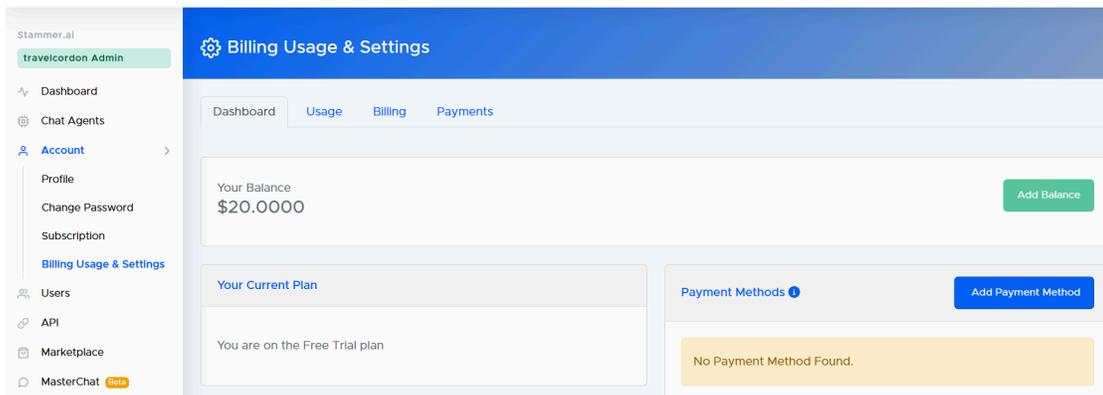
- Choose a plan (Starter, Growth, Pro) with details on message limits, channels, analytics, and integrations.
- Upgrade or downgrade anytime.

Plan	Price	Trial	Key Features
Starter	\$50.00/month	7 days free trial	Includes one chatbot for website use only. Supports up to 1,000 messages per month. A basic knowledge base of ~200.
Growth	\$149.00/month	7 days free trial	Expands to multi-channel support (Website + WhatsApp + Instagram). Includes one chatbot with 5,000 messages per month.
Pro	\$299.00/month	7 days free trial	Includes three chatbots with 10,000 messages per bot. Adds more channels like Telegram and Facebook Messenger. Comes
Enterprise	\$499.00/month	7 days free trial	Designed for large organizations. Includes 5 or more chatbots, with custom usage.

7. Billing Usage & Settings

A. Dashboard Tab: This gives an overview of your billing and usage summary.

- Balance Section
 - Shows your **current wallet balance**.
 - **Option to Add Balance** manually using your preferred payment method.
- Current Plan
 - Displays **your subscription plan**.
 - Indicates what type of plan you are currently using.
- Payment Methods
 - Shows your **linked payment methods** (e.g., cards or Stripe).
 - Allows adding new methods via “Add Payment Method” button.
- Extra Subscriptions
 - Lists any **additional services you’ve subscribed to**:
 - Extra Storage Subscriptions
 - Extra Chat Agent Subscriptions
 - Extra Voice Agent Subscriptions
 - Each shows details such as Amount, Start Date, Interval, Status, and Next Recharge.



Extra Storage Subscriptions						
Show	10	entries	Search: <input type="text"/>			
Characters	Amount	Started At	Next Recharge At	Status	Action	
No data available in table						
Showing 0 to 0 of 0 entries					Previous	Next

Extra Chat Agent Subscriptions						
Show	10	entries	Search: <input type="text"/>			
Chat Agents	Amount	Started At	Next Recharge At	Interval	Status	Action
No data available in table						
Showing 0 to 0 of 0 entries					Previous	Next

Extra Voice Agent Subscriptions						
Show	10	entries	Search: <input type="text"/>			
Voice Agents	Amount	Started At	Next Recharge At	Interval	Status	Action
No data available in table						
Showing 0 to 0 of 0 entries					Previous	Next

B. Usage Tab: This section tracks how your credits, storage, and agents are being used.

- **Wallet Usage**
 - Displays **available balance** and **usage cost breakdown**: Last 24 hours, Last 7 days, Last 30 days.
 - Option to **Add to Wallet Balance** directly.

- **Storage (Characters)**
 - Shows **available, used, and total characters** for chatbot data and training.
 - **Used by Chat Agents** indicates how many characters your chatbots consumed.
 - Option to **Get More Storage** if limits are reached.

- **Chat Agents**
 - Shows number of **available, used, and total chat agents**.
 - Displays both **package** and **additional purchased** agents.
 - Option to **Add More Chat Agents** if you need extra ones.

Dashboard Usage **Billing** Payments

Wallet Usage

Available Balance \$4.9260

Usage Details	
Last 24 Hours	\$0.03
Last 7 Days	\$0.07
Last 30 Days	\$0.07

[Add to Wallet Balance](#)

Storage (Characters)

Available Characters	500.00k
Used Characters	0
Used by Chat Agents	405.84k
Total Characters	500.00k
Characters from package	0
Additional Characters	0
Bonus Characters	500.00k

[Get More Storage](#)

Chat Agents

Available Chat Agents	0
Used Chat Agents	1
Total Chat Agents	1 (1 + 0)
Chat Agents from package	1
Additional Chat Agents	0

[Add more Chat Agents](#)

- **Wallet Transactions**

- A log of **financial activity** in your account:
 - Each transaction includes **ID, Chat Agent name, Date, Reason, Amount, and Balance.**
 - You can **export all transactions** for records.

Wallet Transactions [Export All](#)

Select date range All

Show entries Search:

ID	Chat Agent	Date	Reason	Initiator	Amount	Balance	Invoice
11027563	-	Oct. 03, 2025, 10:41 a.m.	Amount used for generating AI Summary of Conversation.	System	-\$0.0300	\$4.926	-
10985284	AAIH ChatBot	Oct. 02, 2025, 10:39 a.m.	Message Sent: GPT-4o-2024-11-20	User	-\$0.0110	\$4.956	-
10985280	AAIH ChatBot	Oct. 02, 2025, 10:39 a.m.	Message Sent: GPT-4o-2024-11-20	User	-\$0.0110	\$4.967	-

- **Storage Transactions**

- Tracks **usage and top-ups** of storage characters.
 - Shows how many characters were **added or consumed.**
 - Each record lists **Initiator (System/User), Characters used, and Balance.**

Storage Transactions [Export All](#)

Select date range All

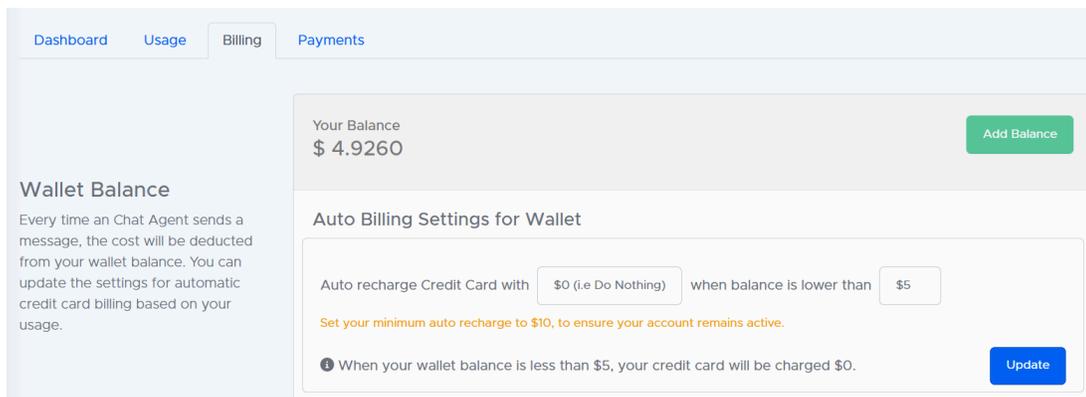
Show entries Search:

ID	Chat Agent	Date	Reason	Initiator	Characters	Balance
10606712	AAIH ChatBot	Oct. 02, 2025, 10:14 a.m.	Storage characters used for Chat Agent knowledge base.	User	- 405,837	94,163
10606615	-	Oct. 02, 2025, 10:01 a.m.	Characters added on sign up.	System	+ 500,000	500,000

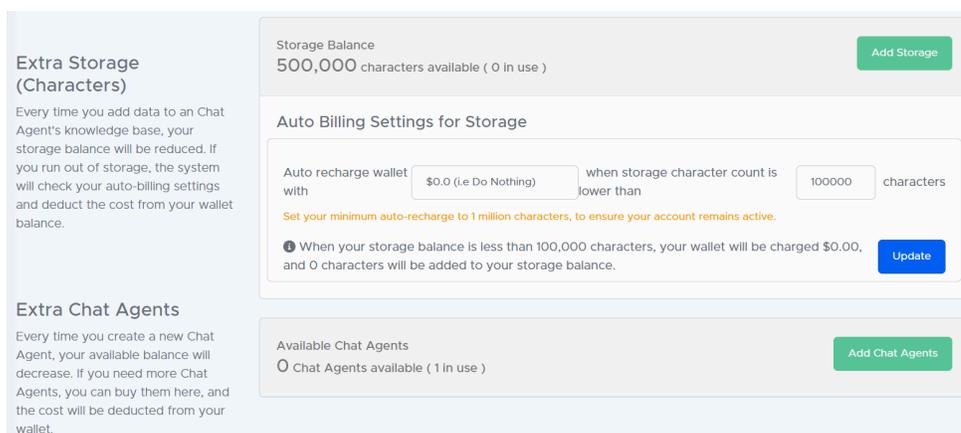
Showing 1 to 2 of 2 entries Previous Next

C. Billing Tab: This section handles auto-recharge and billing settings for wallet and storage.

- **Wallet Balance**
 - Shows your **current balance** and description of how charges work.
 - Explains that **each chatbot message** deducts from your wallet.
 - Provides **Auto Billing Settings:**
 - You can set a **minimum auto-recharge amount** (recommended \$10).
 - Set when auto-charge triggers (e.g., when balance < \$5).

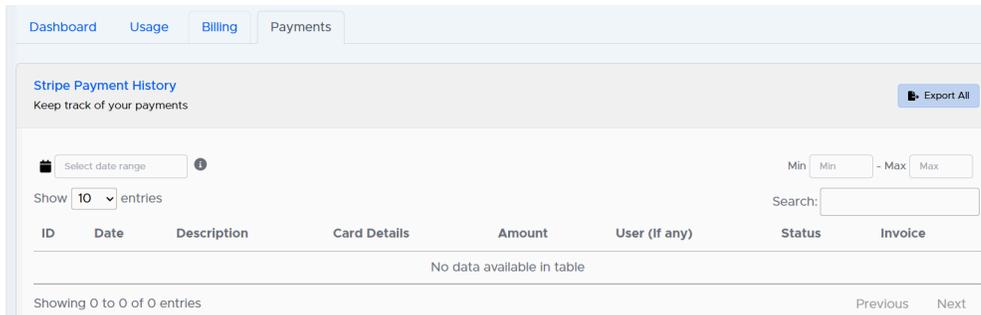


- **Storage Auto-Billing**
 - Shows **remaining character storage** and **usage monitoring**.
 - Option to set **auto top-up** when storage is low:
 - E.g., recharge when < 100,000 characters remain.
 - Displays **“Add Storage”** button for manual top-ups.
- **Extra Chat Agents**
 - Displays number of **available and used chat agents**.
 - Allows adding more agents using the **“Add Chat Agents”** button.
 - Explains that each new agent **deducts from your wallet**.



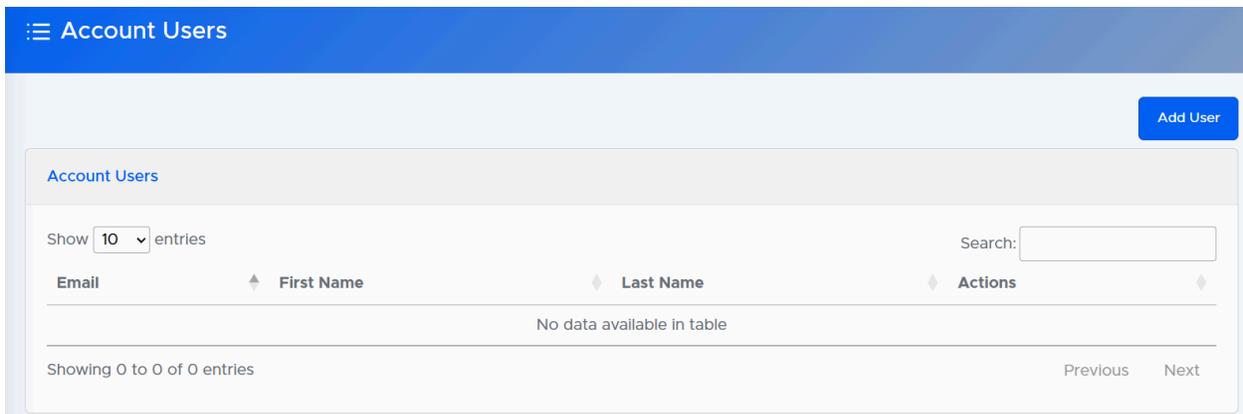
D. Payment Tab: This section tracks payment history and receipts.

- Stripe Payment History
 - Shows your **past payment records** (processed via Stripe).
 - Columns include **ID, Date, Description, Card Details, Amount, Status, and Invoice.**
 - You can **filter by date range or amount.**
 - Option to **export payment history** for reporting or bookkeeping.



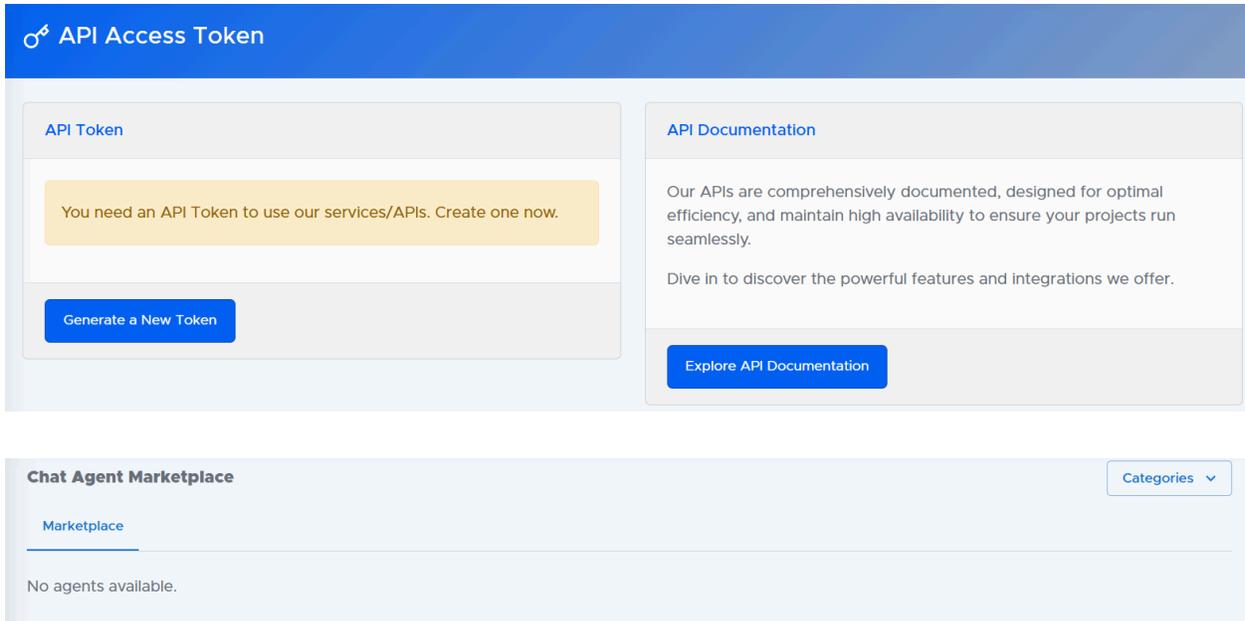
8. Users

- Add or remove team members.
- Manage access levels and permissions.



9. API & Marketplace

- Access your API details for custom integrations.
- Explore available add-ons and integrations in the Marketplace.



That's it - you're ready to engage clients with **your AI Chatbot**.

👉 With **AI FrontDesk Pro**, you have a scalable, branded, and easy-to-manage AI solution that grows with your business.