

# PINXS Ai Chatbot

## Customer Setup and User Guide

Version 1.0.109 | Retail end-user documentation

### A short message from Mike Edmonston

Thank you for choosing Plugin Nexus. This guide has been written to help you install, activate, configure and operate PINXS Ai Chatbot with confidence. If you need help, please use the support options available through Plugin Nexus, including our website chatbot, customer ticket system and documentation resources. We are continuing to improve the software, documentation and support experience as the Plugin Nexus product range grows.

Website: <https://pluginnexus.com>

Product: PINXS Ai Chatbot

Supplier: Plugin Nexus

Licence model: Commercial Plugin Nexus product. Redistribution, resale, publishing or sharing of the plugin package or source code is not permitted without written permission from Plugin Nexus.

### Purpose of this guide

This document explains the plugin from the point of view of the site owner or administrator. It covers installation, licence activation, API setup, widget setup, knowledgebase building, usage limits, paid access, live human support, transcript emails, chat logs, troubleshooting and everyday operation.

## Index

Use the links below to jump directly to a section. In the PDF version, most PDF viewers will also allow these links to be clicked.

- [1. Overview](#)
- [2. Requirements and compatibility](#)
- [3. Licence activation and customer account requirements](#)
- [4. Installing the plugin](#)
- [5. First setup checklist](#)
- [6. AI provider and API key setup](#)
- [7. Chatbot display, floating widget and shortcode](#)
- [8. Knowledgebase Control Centre](#)
- [9. Importing knowledgebase content](#)
- [10. Manual knowledge, PDFs and edited knowledge entries](#)
- [11. Expert role, answer focus and language behaviour](#)
- [12. Chat transcripts and email verification](#)
- [13. Usage limits, paid access and customer exemptions](#)
- [14. Live human support handover](#)
- [15. Chat logs, usage diagnostics and data management](#)
- [16. Testing and launch workflow](#)
- [17. Security, privacy and API cost control](#)
- [18. Settings retention, updates and safe editing](#)
- [19. Troubleshooting](#)
- [20. FAQ](#)
- [21. Appendix: field reference](#)
- [22. Final pre-launch checklist](#)

## 1. Overview

PINXS Ai Chatbot is a WordPress plugin for adding a domain-aware AI assistant to a website. It can answer visitor questions using the site knowledgebase, imported content, manual entries, product data and the configured expert behaviour profile.

The plugin can display as a floating chatbot widget or as an embedded shortcode, log conversations, enforce daily question limits, provide optional paid access through WooCommerce, email transcripts after verification, and allow an administrator to take over a live chat when human support is available.

Area	What it does
AI chatbot	Answers visitor questions using the selected AI provider, model, expert role and knowledgebase.
Knowledgebase	Builds an indexed set of posts, pages, WooCommerce products, CSV imports, PDF content and manual entries.
Usage control	Limits free questions per visitor per day and can connect paid access to a WooCommerce product.
Live support	Lets an administrator take over a chat from the AI when human help is available.
Transcripts	Allows visitors to request a transcript email with verification and spam-protection handling.
Administration	Includes logs, exports, usage records, verification records, and live support conversation tools.

### Important

The chatbot should be treated as assisted automation, not a replacement for responsible support, moderation or professional advice. Always test the chatbot with your own content, review answers, configure limits and monitor early live conversations before relying on it in a production support workflow.

## 2. Requirements and compatibility

Before installing, check that the website meets the requirements and that the administrator understands the external AI provider requirement.

Requirement	Recommended value
WordPress	WordPress 6.0 or newer is recommended.
PHP	PHP 8.1 or newer is recommended for modern WordPress hosting.
Administrator access	Required to install the plugin, activate the licence, configure API keys and manage settings.
AI provider account	OpenAI is the default provider. Other configured providers may be available depending on the plugin build and settings.
WooCommerce	Optional, but required if using paid chatbot access, customer exemptions or product-based access.
SSL certificate	Strongly recommended for all production sites, especially when handling accounts, support requests or checkout.
Working email delivery	Recommended for transcript verification emails, customer messages and WooCommerce account flows.

If the site uses aggressive caching, disabled REST API access, security hardening, disabled WP-Cron or custom checkout/account behaviour, test the plugin on a staging site before using it publicly.

## 3. Licence activation and customer account requirements

The retail version includes Plugin Nexus licensing. The plugin should be activated using the licence key and customer email supplied with the purchase. A valid licence is required for authorised operation and for access to updates according to the purchased licence terms.

1. **Purchase or download the plugin from Plugin Nexus.** The order, download and licence details are made available through your Plugin Nexus customer account and email notifications.

2. **Install and activate the plugin.** After activation, the Plugin Nexus licence screen or setup notice will appear if the licence is not active.
3. **Open the licence screen.** Use the admin notice or plugin licence menu entry for PINXS Ai Chatbot.
4. **Enter the licence key and licence email.** Use the exact email address associated with the licence.
5. **Click Activate License.** When successful, the licence status should show active. If the licence is expired, invalid or used on too many sites, follow the message shown on screen.

#### Licence notes

Keep the licence key private. Do not publish it, add it to screenshots, paste it into public support forums or share it with unlicensed third parties. If a site is moved to a new domain, deactivate the licence on the old site where possible before activating it on the new one.

## 4. Installing the plugin

Most customers will install the plugin through WordPress admin. FTP or hosting file manager installation is available when required.

### Install through WordPress admin

6. Sign in to WordPress admin as an administrator.
7. Go to Plugins > Add New.
8. Click Upload Plugin.
9. Choose the PINXS Ai Chatbot ZIP file.
10. Click Install Now.
11. When installation completes, click Activate Plugin.
12. Complete Plugin Nexus licence activation if prompted.

### Install by FTP or file manager

13. Extract the plugin ZIP on your computer.
14. Upload the plugin folder to `/wp-content/plugins/`.
15. Go to Plugins in WordPress admin.
16. Activate PINXS Ai Chatbot.
17. Complete licence activation and API setup.

#### Do not rename the plugin folder

When updating or reinstalling, keep the original plugin folder structure intact. Renaming folders can create duplicate plugin entries or prevent WordPress from updating the correct plugin.

## 5. First setup checklist

- **Activate the licence.** The retail plugin requires a valid Plugin Nexus licence to operate correctly.
- **Enter the API key.** The chatbot cannot generate AI replies until a valid provider key is saved.
- **Choose the model.** Start with the default model unless you have a specific provider/model requirement.
- **Configure the widget.** Decide whether to show the floating launcher, shortcode chatbot, or both.
- **Build the knowledgebase.** Include pages, posts, products, PDF/manual entries or CSV imports as required.
- **Set answer boundaries.** Configure expert role, custom instruction, out-of-scope message and general knowledge rules.
- **Configure contact and live support options.** Decide whether visitors can contact support, request transcripts or ask for human help.
- **Set usage limits.** If needed, limit free daily questions and configure paid/customer access.
- **Test before launch.** Ask realistic questions, check logs and verify that answers are accurate and within scope.

## 6. AI provider and API key setup

PINXS Ai Chatbot uses your own AI provider account. This gives you control over cost, model choice and data processing, but it also means API usage may create charges on your provider account.

Setting	Guidance
Provider	OpenAI is the default provider in this build. Select another provider only if the plugin build and your account support it.
API key	Paste the API key into the plugin settings. Treat the key like a

	password.
Model	The default model is gpt-4o-mini. Use a different model only if it is supported by your provider and account.
Temperature	Lower values give more consistent answers. Higher values are more creative but may be less predictable.
Max tokens	Controls approximate maximum response length. Larger values can increase cost.
Custom endpoint	Leave blank unless your provider or proxy setup specifically requires an endpoint override.

18. Open PINXS Ai Chatbot > Settings.
19. Choose the AI provider.
20. Enter the API key.
21. Confirm the model name.
22. Set temperature and max tokens conservatively for the first test.
23. Save settings.
24. Ask a test question from the front end and review the answer and log entry.

#### API key security

API keys are stored by the plugin and should be treated like passwords. Do not share them with other users, paste them into public tickets, or leave them visible in screenshots. Monitor provider usage directly in your AI provider dashboard.

## 7. Chatbot display, floating widget and shortcode

The chatbot can be displayed as a floating site-wide launcher, an embedded shortcode, or both. Use the floating launcher for a support-style assistant that follows visitors around the site. Use the shortcode when you want the chatbot inside a specific page, support area, landing page or members-only section.

Display control	Purpose
Enable plugin	Turns the chatbot functionality on or off.
Show floating chatbot	Displays the launcher across the public site.
Title	The heading shown in the chatbot window.
Welcome message	The first message visitors see when they open the chat.
Placeholder	The text shown in the input field before the visitor types.
Launcher icon and position	Controls the visual launcher button and whether it appears left or right.
Colour and size controls	Adjusts primary colour, message colours, chat width, chat height, radius and offsets.
Custom CSS	For advanced visual adjustments when the built-in controls are not enough.

#### Shortcode usage

Place the shortcode below into a WordPress page, post, widget area, shortcode block or compatible page builder area:

##### Shortcode

```
[pinxs_ai_chatbot]
```

Do not show too many different chatbot instances on the same page unless you have tested the behaviour carefully. A single floating widget or one embedded chatbot is usually best.

## 8. Knowledgebase Control Centre

The Knowledgebase Control Centre is the main workspace for building, importing, searching, exporting and maintaining chatbot knowledge. The chatbot answers better when the knowledgebase is accurate, focused and kept up to date.

Area	Purpose
Rebuild Knowledgebase	Refreshes the JSON/indexed knowledge store after settings, imports

	or entries change.
Import Knowledgebase Data	Imports CSV product/spec rows, WooCommerce CSV exports, current-site WooCommerce products or legacy same-site product data.
Export Knowledgebase	Downloads the knowledgebase as JSON or CSV for backup, review or spreadsheet checking.
Knowledgebase Browser	Searches and browses indexed items, sources, URLs, product codes and content.
Edited knowledge entries	Allows specific knowledgebase text to be overridden or cleared where supported by the browser actions.

### Knowledgebase quality matters

The chatbot can only use the context it is given. Keep knowledgebase entries accurate, current and written in a way that matches the answer style you want visitors to see. Remove outdated content and rebuild after important changes.

## 9. Importing knowledgebase content

The plugin supports several import paths so the chatbot can learn from the website and from prepared data sources.

Import type	When to use it
Pages and posts	Useful for FAQs, documentation, service pages, tutorials and public information pages.
WooCommerce products	Useful when visitors ask product questions, pricing questions or support questions linked to product pages.
WooCommerce CSV export	Useful when importing catalogue data from another WooCommerce site or reviewing exported product content.
CSV product/spec rows	Useful for structured product/specification rows from older catalogues or external systems.
PDF documents	Useful for product manuals, support guides, terms, onboarding documents and reference material.
Manual knowledge entries	Useful for important answers, policies, support instructions or private knowledge that should not be a public page.

### Recommended import workflow

25. Decide which content sources are relevant to the chatbot's purpose.
26. Enable the required content sources in Settings.
27. Import any CSV, WooCommerce CSV or PDF files that should be included.
28. Add manual entries for key support answers or site policies.
29. Click Rebuild Knowledgebase.
30. Use the Knowledgebase Browser to search for important terms and verify that the expected content is present.
31. Ask front-end test questions and review whether the chatbot uses the intended information.

## 10. Manual knowledge, PDFs and edited knowledge entries

Manual Knowledge is useful when the chatbot needs concise support answers, policies, product guidance or internal explanations that are not suitable as public pages. PDF import is useful for longer manuals and existing written documentation.

Feature	Guidance
Manual entry title	Use clear titles such as Refund policy summary, Licence activation help or Product setup steps.
Manual content	Write the answer in the way you want visitors to understand it. Short, direct text works best.
Tags	Use comma-separated tags to improve organisation and searching.
Source URL	Add a URL when the knowledge should point back to a public page or documentation page.
PDF import	Import product guides or manuals, then review the extracted text and rebuild the knowledgebase.
KB overrides	Use edited knowledge text where a generated/imported entry needs

cleaning up for better chatbot answers.

### Best practice

Manual entries should not be used as a dumping ground for everything. Use them for high-value answers and keep them current. If a policy changes, update the manual entry and rebuild the knowledgebase.

## 11. Expert role, answer focus and language behaviour

The expert role and instruction fields control what the chatbot is allowed to answer and how it should behave when it does not know something.

Control	Recommended use
Expert role	Choose the role that best matches the site purpose, such as product support expert or specialist adviser.
Custom expert instruction	Defines answer boundaries, what counts as in-scope, and how the assistant should respond.
Out-of-scope message	A safe message shown when a visitor asks unrelated general questions.
Allow general knowledge	Allow only when general expert answers are appropriate for the configured role.
Knowledge priority	Controls whether the chatbot favours knowledgebase content or broader expert knowledge.
No-match mode	Controls what happens when the knowledgebase does not contain a clear answer.
Response locale mode	Controls spelling and phrasing, such as site language, auto-detected language or selected locale.

### Best practice

For business and support websites, keep the chatbot focused. It should answer questions related to the website, products, services, documentation or configured specialist subject. Avoid turning it into a general-purpose chatbot unless that is the clear intention.

## 12. Chat transcripts and email verification

The chatbot can allow visitors to request a copy of the chat transcript when ending the session. This is useful for support, reference and customer reassurance. The plugin includes email verification to reduce abuse.

Transcript setting	Purpose
Allow transcript request	Shows an option for visitors to request an emailed transcript when closing the chat.
Transcript email subject	Controls the subject line of the transcript email.
Email transcript button text	Controls the button label shown to the visitor.
End chat prompt text	Explains the transcript option before the session is closed.
Verification email subject	Subject line for the verification email.
Verification pending message	Message shown after the visitor requests the transcript.
Spam disclaimer	Explains why the recipient is receiving the transcript-related email.

32. Enable transcript email requests in Settings.
33. Configure the transcript email subject and button text.
34. Configure the verification email subject and pending message.
35. Check that WordPress email delivery is working correctly.
36. Run a test conversation, request a transcript and confirm the verification email is received.
37. Click the verification link and confirm the transcript is sent after verification.

## 13. Usage limits, paid access and customer exemptions

Usage Control helps protect the site from excessive API usage. It can limit the number of free questions per visitor per day, exempt administrators, exempt customers, and connect paid chatbot access to a WooCommerce product.

Usage control	Purpose
Enable usage limits	Turns on daily visitor question limits.
Free questions per day	Sets how many free questions a visitor can ask each day.
Exempt admins	Allows administrators to test without consuming free question allowance.
Exempt product customers	Allows logged-in customers to bypass limits when the store policy allows.
Store visitor diagnostics	Stores IP/user-agent/referrer style diagnostics for abuse checks and support diagnosis.
Paid access enabled	Connects continued access to a WooCommerce product.
Paid product ID	The WooCommerce product that grants access.
Access days	How long paid access lasts, such as 365 days.
Button destination	Controls whether the limit prompt sends visitors to cart, checkout or another route.

### WooCommerce requirement

Paid chatbot access and customer-based exemptions require WooCommerce. Create the access product, confirm checkout works, and test the logged-in customer account before relying on paid access publicly.

## 14. Live human support handover

Live Support allows a site administrator to take over a conversation when a visitor asks to speak to a human. This turns the chatbot into a hybrid AI/support tool.

Live support setting	Purpose
Enable live support	Allows visitors to request human help from the chatbot.
Admin alert button	Shows an admin-side alert when live support requests arrive.
Shake/sound alert	Adds visual or audio admin notification options.
Auto offline minutes	Controls how quickly live support is treated as unavailable when no admin activity is detected.
Request button text	Visitor-facing text such as Talk to a human.
Offline button/message	Text shown when human support is not available.
Busy message	Text shown when a support person is already helping another visitor.
Joined message	System message shown when a support user joins the chat.
Auto greeting	Optional first message sent when an admin takes over.

38. Enable live support in Settings.
39. Configure visitor button text and offline/busy messages.
40. Open the Live Support admin page.
41. Set yourself available where the interface provides that option.
42. Ask for human help from the front-end chatbot as a test visitor.
43. Use Takeover to join the conversation.
44. Use Release to return the visitor to the AI assistant or Close to end the support conversation.

### Operational note

Live support is only useful when an administrator or support person is actually available. If nobody is watching the live support screen, leave clear offline and contact-page messages so visitors know how to get help.

## 15. Chat logs, usage diagnostics and data management

The plugin includes logs and management screens so administrators can review conversations, export records, monitor usage and manage email verification records.

Admin area	What to review
Chat Logs	Visitor messages, AI replies, matched sources, IP details and timestamps where logging is enabled.
Usage Control	Question counts, visitor keys, dates, diagnostics, blocked status and export/delete controls.
Email Verifications	Transcript email verification records and status management.
Live Support	Waiting, active, released or closed human support conversations.
Knowledgebase Browser	Indexed sources and knowledge content used by the chatbot.

Use exports before deletion when a visitor requests a copy of stored data or when support/debugging requires a record of activity. Chat logs and usage records may contain personal data, so manage them according to your own privacy policy and legal obligations.

## 16. Testing and launch workflow

45. Activate the licence and confirm the plugin is enabled.
46. Enter a valid API key and confirm the selected model works.
47. Configure title, welcome message, placeholder and widget display settings.
48. Build a small knowledgebase from high-quality content first.
49. Ask simple factual questions about the site and check the responses.
50. Ask product, support and policy questions that should be in-scope.
51. Ask unrelated questions and confirm the out-of-scope behaviour works.
52. Test transcript email request and verification if transcripts are enabled.
53. Test usage limits using an incognito browser if limits are enabled.
54. Test paid access from a customer account if WooCommerce access is enabled.
55. Test live human support if it will be offered publicly.
56. Only launch broadly once the answers, limits, email flow and support flow behave correctly.

### Launch advice

Start with a narrow, reliable knowledgebase and conservative settings. Expand the knowledgebase and access options after the basic chatbot experience is proven.

## 17. Security, privacy and API cost control

- **Protect API keys.** Treat provider keys as passwords and limit admin access to trusted users.
- **Control API usage.** Use daily limits, reasonable max tokens and model selection to prevent runaway costs.
- **Review logs.** Conversation logs can contain visitor text, IP information and other diagnostic data depending on settings.
- **Be careful with sensitive data.** Do not encourage visitors to submit private, confidential or regulated information unless you have a proper policy and legal basis for processing it.
- **Use transcript verification.** Verification helps reduce abuse of the email transcript feature.
- **Document your policy.** Update the site privacy policy if the chatbot collects logs, sends transcripts, uses AI APIs or stores usage records.

## 18. Settings retention, updates and safe editing

The plugin includes settings and database tables for knowledgebase data, logs, usage records, live support conversations and transcript verification. Treat updates carefully on production sites.

- Back up the site files and database before updating.
- Do not rename the plugin folder when replacing or updating the plugin.
- Use the normal WordPress update flow where possible.
- After updating, test the chatbot widget, API response, knowledgebase, logs, usage limits, transcript emails and live support if enabled.

- If uninstalling, confirm whether settings and data should be retained or removed according to the available plugin controls and your site policy.

## 19. Troubleshooting

Problem	Likely cause and fix
Chatbot does not appear	Check that the plugin is enabled, floating chatbot is enabled, cache is cleared, and the shortcode/widget is placed correctly.
AI replies fail	Check API key, provider, model, endpoint override and provider account billing/limits.
Answers are too generic	Rebuild the knowledgebase, add better manual entries, adjust knowledge priority and improve the expert instruction.
Unrelated questions are answered	Tighten the custom expert instruction, out-of-scope message and general knowledge settings.
Transcript email not received	Check WordPress mail delivery, SMTP plugin configuration, spam folder and transcript verification settings.
Usage limit seems wrong	Check visitor diagnostics, admin/customer exemptions, daily reset timing, paid access product and logged-in user state.
Live support unavailable	Confirm live support is enabled, an admin is available, and the auto-offline timeout has not marked support unavailable.
Knowledgebase looks stale	Rebuild the knowledgebase after imports, manual entry changes or product/page updates.

## 20. FAQ

### Does PINXS Ai Chatbot require WooCommerce?

No. WooCommerce is optional unless you want paid chatbot access, product customer exemptions or product catalogue knowledge from WooCommerce.

### Can I use it without a floating widget?

Yes. Disable the floating widget and use the [pinxs\_ai\_chatbot] shortcode on a specific page.

### Does it use my own API key?

Yes. The plugin is designed to use your own provider key so you control provider cost and model choice.

### Can visitors request a transcript?

Yes, if transcript emails are enabled. The plugin can require email verification before sending the transcript.

### Can a human take over from AI?

Yes, if Live Support is enabled and an administrator/support person is available.

### Can I limit free usage?

Yes. Usage Control can limit free questions per day and optionally connect paid access to WooCommerce.

### Can I import PDF manuals?

Yes. PDF import is supported, but always review extracted content and rebuild the knowledgebase after import.

## 21. Appendix: field reference

Group	Important fields
Widget/display	Enabled, show floating, title, welcome message, placeholder, colours, size, position, custom CSS.
AI provider	Provider, API key, model, temperature, max tokens, endpoint override.
Answer behaviour	Expert role, custom instruction, out-of-scope message, general knowledge, knowledge priority, no-match mode, language mode.
Knowledgebase	Include pages, posts, products, variations, private content, CSV imports, Woo imports, PDF/manual entries, search limit, chars per

	item.
Contact support	Contact page button, contact email display, URL, target and button colours.
Transcripts	Transcript enable, subject, prompt, verification subject, verification pending message and spam disclaimer.
Usage control	Daily free questions, admin exemptions, customer exemptions, visitor diagnostics, paid access product and access days.
Live support	Enabled, alert options, auto-offline minutes, request/offline/busy messages, joined message and auto greeting.
Logs/data	Conversation logging, exports, delete actions, usage records and email verification records.

## 22. Final pre-launch checklist

- Plugin installed and activated.
- Plugin Nexus licence activated successfully.
- API key entered and tested with the selected provider/model.
- Widget title, welcome message, placeholder and visual settings checked on desktop and mobile.
- Knowledgebase sources selected and rebuilt.
- Manual entries, PDF imports or CSV imports reviewed where used.
- Test questions answered accurately and within scope.
- Out-of-scope questions handled safely.
- Usage limits tested if enabled.
- Paid access and customer exemptions tested if used.
- Transcript verification email tested if enabled.
- Live human support tested if enabled.
- Chat logs and usage records reviewed for privacy impact.
- Privacy/support/contact pages updated where necessary.
- Full site backup created before public launch.