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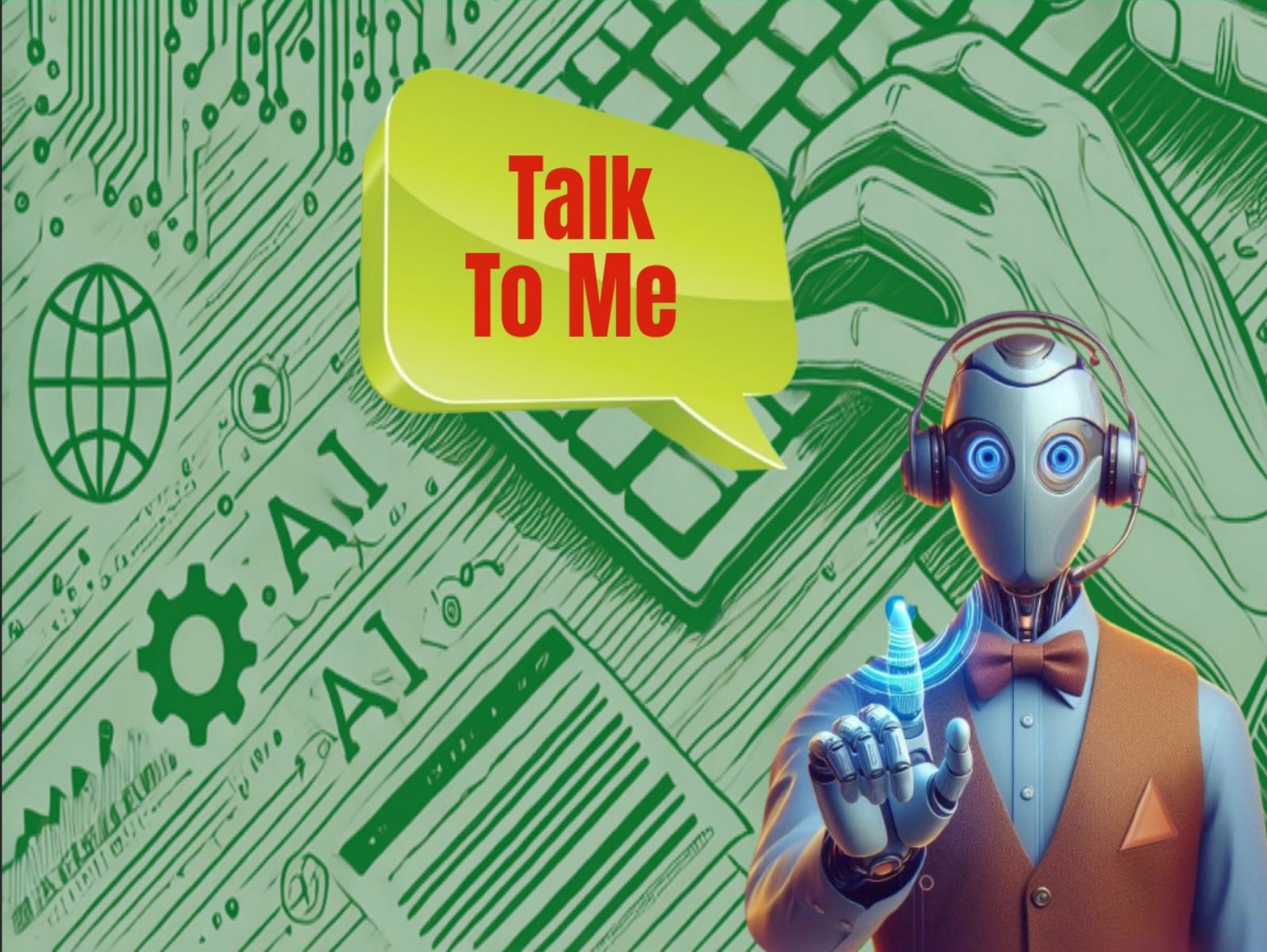
**Introducing
ChatGPT**

We've trained a model called ChatGPT which interacts in a conversational way. The dialogue format makes it possible for ChatGPT to answer followup questions,



Customer Facing Easy AI Chatbots For Local Business

**Talk
To Me**





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Customer Facing Easy AI Chatbots For Local Business

Introduction

In this guide I will take you through the practical steps to create a public facing AI powered fully conversational chatbot.

To do this I will be creating an OpenAI Assistant. This is a specific type of fully conversational AI chatbot that can be trained for specific functionality, purpose and business type etc.

In the previous book – How To Create Custom GPTs For Local | Business – I explained how to create a specific set of instructions for a business and a specific process. These same instructions used to create a Custom GPT can be used to create an AI Assistant.

With the Assistant created you can use the our WP chatbot plugin to connect to the Assistant you created and enable a chatbot to sit on your, or your clients, website. This is public facing and will be available to all website visitors.

You can use this to offer customer support specific to your customers. And as the chatbot is AI powered it is able to answer a much wider range of questions than a pre programmed static chatbot.

It is able to learn from the website and be trained on specific subjects or data. Like price lists, product catalogues or mortgage rates.



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In this guide I will continue to use the same example of a Mortgage Advisor and the same instructions we created in the previous book.



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Step 1: Plugin Installation Guide

This section will guide users through **installing, activating, and setting up** the WP Chatbot Assistant plugin in WordPress.

Customer Support

Introducing ChatGPT
We've trained a model called ChatGPT which interacts in a conversational way. The dialogue format makes it possible for ChatGPT to answer followup questions.

Easy AI Chatbots
WordPress Plugin

Use OpenAI's latest Fully Conversational, Assistants API.

We Know The Answer

WordPress logo

Installing the WP Chatbot Assistant Plugin

To use the WP Chatbot Assistant, you need to upload and activate it in your WordPress dashboard. Follow these steps:



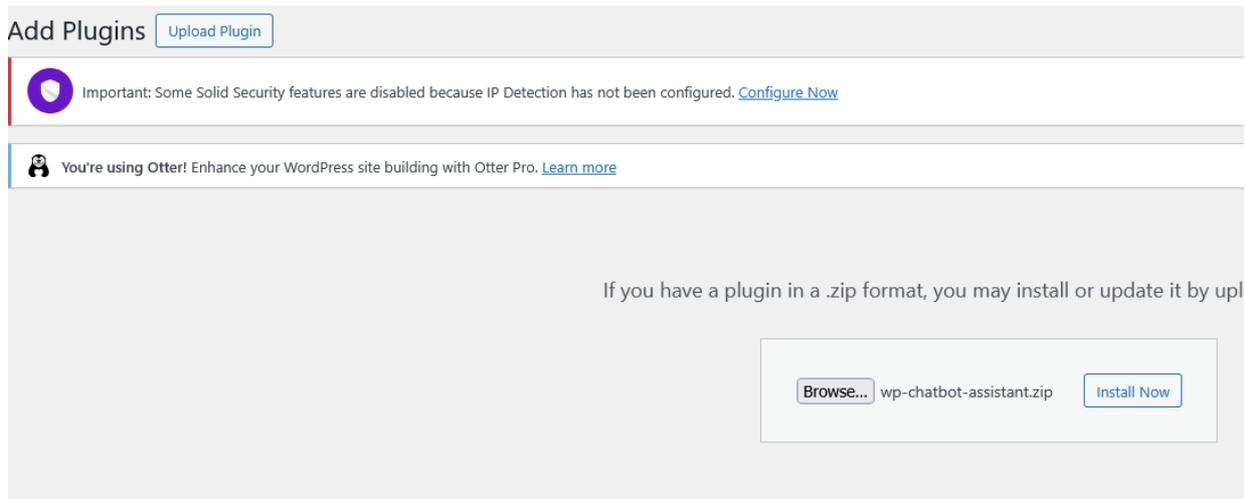
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1. Download the Plugin

Ensure you have the plugin's ZIP file (`wp-chatbot-assistant.zip`) ready for upload.

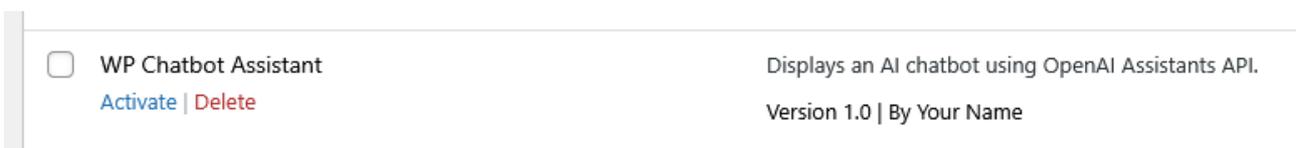
2. Upload the Plugin to WordPress

1. Log in to your **WordPress Admin Dashboard**.
2. Navigate to **Plugins > Add New**.
3. Click **Upload Plugin** at the top of the page.
4. Click **Choose File**, select `wp-chatbot-assistant.zip`, and click **Install Now**.



3. Activate the Plugin

1. Once the installation is complete, click **Activate Plugin**.
2. After activation, a new settings page will be available under **Settings > Chatbot Assistant**.





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Step 2: Configuring the Chatbot Settings

After installing the plugin, the next step is to configure its settings to connect it to an OpenAI Assistant and customize its appearance and behaviour.

Accessing the Chatbot Settings

1. In the WordPress admin dashboard, go to **Settings > Chatbot Assistant**.
2. The settings page contains several options for configuring the chatbot's functionality and appearance.

The screenshot shows the WordPress admin dashboard with the 'Settings' menu highlighted. The 'Chatbot Assistant' sub-menu is selected, leading to the 'Chatbot Settings' page. The settings are as follows:

Setting	Value
OpenAI API Key	<input type="text"/>
OpenAI Assistant ID	<input type="text"/>
Chatbox Title	Morgage Advisor
Assistant Name	Jennifer
Chatbox Placeholder	Ask a morgage question
Initial Default Question	Check If I Qualify For A Mortgage
Chatbox Background Color	<input type="color" value="#007bff"/>
Chatbox Text Color	<input type="color" value="#ffffff"/>

A 'Save Changes' button is located at the bottom of the settings form.



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General Settings

- **OpenAI API Key** – Enter your OpenAI API key to enable the chatbot to communicate with your assistant.
<https://platform.openai.com/settings/organization/api-keys>
- **OpenAI Assistant ID** – Enter the Assistant ID for the OpenAI Assistant you want the chatbot to use. This ensures the chatbot is connected to the correct AI model. See details in next section.
- **Chatbox Title** – Customize the title displayed at the top of the chatbot window.
- **Assistant Name** – Set the name displayed in chatbot conversations (e.g., "Jason – Mortgage Broker Assistant").
- **Chatbox Placeholder** – Customize the placeholder text in the chat input field. e.g. "***Ask me a question about mortgages***".

Default Question

- **Initial Default Question** – Enter a question that will be displayed as a button in the chatbot. Users can click this button to ask the chatbot the predefined question without typing.
- The default question for the mortgage broker chatbot is: "***Check if I qualify for a mortgage.***" This would start a specific process where the chatbot asks questions and leads the conversation to get the results.

Appearance Settings

- **Chatbox Background Color** – Select a colour for the chatbox header, send button, and default question button.
- **Chatbox Text Color** – Select a colour for the text in the chatbox header, send button, and default question button.



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Saving Your Changes

Once you have entered the required details, click **Save Changes** at the bottom of the settings page. The chatbot will update immediately with the new settings.



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Step 3: Connecting the Chatbot to an OpenAI Assistant

For the chatbot to function properly, it must be connected to an OpenAI Assistant. This section provides a **step-by-step guide** to creating and configuring your assistant using OpenAI's platform.

1. Accessing the OpenAI Assistants Platform

1. Open your web browser and go to the OpenAI Assistants page:
<https://platform.openai.com/playground/assistants>
2. If you're not already logged in, sign in using your OpenAI account.
3. Click "**Create an Assistant**" to start setting up a new assistant.

2. Naming Your Assistant

- In the **Assistant Name** field, enter:
Jason – Mortgage Broker Assistant
- This name will be displayed in your OpenAI dashboard and referenced in the chatbot settings.

Assistants

 Jason - Mortgage Broker Assistant 

Name

Jason - Mortgage Broker Assistant

asst_GXMc72hIsoS686UG0vH9gShK



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Jason is a Mortgage Broker Assistant that specializes in answering mortgage-related queries and guiding users through loan applications. It follows a structured question-and-answer approach to help users assess mortgage eligibility, compare loan options, and generate printable mortgage estimates.

Core Behavior and Restrictions:

- Jason only answers mortgage-related queries.
- If a user asks a question outside of mortgage topics, Jason responds:
"Sorry, I can't help with that."
- Jason always ends responses with a relevant question to maintain the conversation flow.
- Jason asks for **one piece of information at a time**, unless offering a **multiple-choice question**.

Conversation Flow & Process Steps

1. Greeting and Initial Inquiry

- Chatbot: *"Hi, I'm Jason, your mortgage assistant. How can I help? Would you like a mortgage assessment?"*

2. Identifying the User's Needs

- Chatbot: *"Are you a first-time homebuyer, refinancing, or just exploring options?"*

3. Collecting User Information (One Question at a Time)

- *"What is your estimated annual income?"*
- *"Do you know your credit score range? (Excellent, Good, Fair, Poor)"*
- *"What loan amount are you considering?"*



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- This feature is primarily used for advanced calculations, but Jason's responses are based on pre-defined mortgage logic.

Response Format (Keep Default)

- Leave **Response Format** as the default option (**Text-based replies**).
- Jason provides structured, human-readable answers rather than JSON-based responses.

Temperature (Set Between 0.2 – 0.5)

- **Temperature** controls the randomness of responses.
- Set this to **0.3** to keep Jason's answers structured and reliable.
- A higher value (e.g., 0.8) makes responses more creative but less predictable. More creativity may be used for creating stories, music or artwork etc.

5. Saving the Assistant & Retrieving the Assistant ID

1. Scroll down to the bottom of the page and **click "Save"** to finalize your assistant settings.
2. After saving, an **Assistant ID** will be generated (it will look something like `asst_XXXXXXXXXXXX`).
3. **Copy this Assistant ID**—you'll need it to connect the chatbot to your website.

Jason - Mortgage Broker Assistant

`asst_GXMc72hIso5686UG0vH9gShK`



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Adding the Assistant to the Plugin

Once the assistant is created, follow these steps to integrate it with your WordPress chatbot:

1. **Copy the Assistant ID** from OpenAI.
2. In WordPress, go to **Settings > Chatbot Assistant**.
3. Paste the **Assistant ID** into the **OpenAI Assistant ID** field.
4. Click **Save Changes**.

Chatbot Settings

OpenAI API Key	<input type="text" value="sk-9LKlxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxP8tSdM1XOBxYY9zTwc"/>
OpenAI Assistant ID	<input type="text" value="asst_GXMc7xxxxxxxxxxxxxxxxH9gShK"/>

Your chatbot is now connected to the OpenAI Assistant and ready to answer mortgage-related queries.



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Step 4: Training the Assistant with Website Content

To improve the chatbot's ability to answer mortgage-related queries, you can provide it with relevant content from your website. The WP Chatbot Assistant plugin includes a built-in tool for exporting text from selected pages and posts. This content can then be uploaded to OpenAI's Assistants platform to enhance Jason's knowledge.

Exporting Website Content for Training

1. In the WordPress admin dashboard, go to **Settings > Chatbot Assistant**.
2. Click on the **Chatbot Export** tab.
3. A list of all website pages and blog posts will be displayed.
4. Select the pages and posts that contain useful mortgage-related information.
5. Click the **Generate and Download** button.

The plugin will create a `.txt` file containing the text from the selected posts and pages.

The exported file will be named using your website's domain name, for example:

yourwebsite.com-assistant-data.txt



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- Media
- Links
- Pages
- Comments
- Smart Links
- OptinMonster 1
- Neve
- Appearance
- Plugins 1
- Users
- Tools
- Settings**
- General
- Writing
- Reading
- Discussion
- Media
- Permalinks
- Privacy
- Chatbot Assistant
- Chatbot Export**

Select all pages and posts from the list below to create a text data file for training the assistant. Once downloaded, upload the file to the assistant in the OpenAI Assistants page: <https://platform.openai.com/assistants>

- test bot
- Terms & Conditions
- Privacy Policy
- Plan Your Content: Building a Roadmap for Attracting Visitors
- Defining Your Purpose: Building a Roadmap for Your Online Journey
- Summarizing Your First Steps Online: Building the Foundation of Your Digital Success
- Purchasing Hosting: Setting the Foundation for Your Website
- Choosing a WordPress Theme: Setting the Style for Your Site
- Creating a Google Account: Your Gateway to Essential Online Tools
- WordPress Backups: Protecting Your Website's Data
- Keeping Your Site Safe: WordPress Security Basics
- Enhancing Your Site with WordPress Plugins
- WordPress Admin Tour: Navigating Your Site's Control Center
- Building Your Website with WordPress: Bringing Your Vision to Life
- Setting Up Your Domain Email: A Professional Touch
- Exploring cPanel: Your Website's Control Center
- Connecting Your Domain Name to Hosting: Making Your Website Accessible Online
- Buying a Domain Name: Your Unique Online Address
- WordPress vs. HTML: Why WordPress is Ideal for Beginners
- Getting Started Online: The Essentials You Need
- A Beginner's Guide to Product Creation: Why It's More Than Just Profits
- Reputation Management for Beginners: Reviews and Ratings
- A Basic Guide to Accessibility: Legal and Inclusive
- Business Citations: A Beginner's Guide
- A Beginner's Guide to Google Business Profile (formerly Google My Business)

- Chatbot Assistant
- Chatbot Export**
- Imagify
- XML-Sitemap
- All in One SEO
- Backup Migration
- Security

- (Local Business part 1) Selling Services To Offline Clients
- 100 Quick Traffic Tips
- 180 Free Online Resources To Help With Your IM
- The 12 Steps of a Killer Sales Page
- Making sense of Competition & search Volumes - Exact, Broad & Ph
- My Best Advice To All New Internet Marketers
- Your Greatest Resource For IM Training

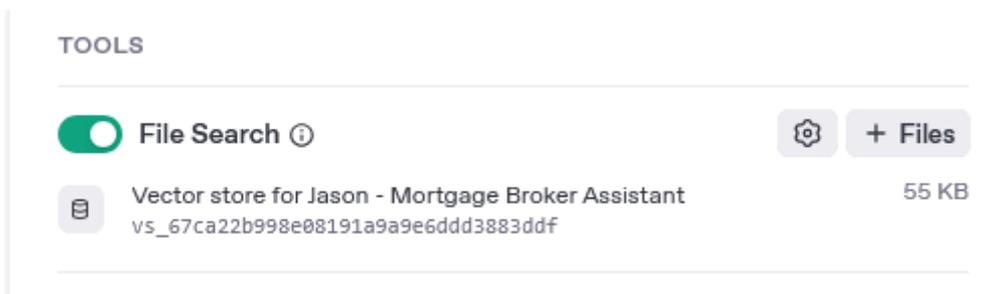
[Generate and Download](#)



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Uploading the Content to OpenAI

1. Go to OpenAI's Assistants page:
<https://platform.openai.com/playground/assistants>
2. Open the **Jason – Mortgage Broker Assistant** settings.
3. Look for the **"File Uploads"** section.
4. Upload the exported `.txt` file from your computer.
5. OpenAI will process this data, allowing Jason to provide more accurate responses based on your website's information.



Best Practices for Content Selection

- Select **FAQ pages**, blog posts, and guides related to mortgage eligibility, loan types, and refinancing.
- Avoid pages with irrelevant content or marketing-heavy language.
- Keep the exported content concise and structured for better AI comprehension.

Once the content is uploaded, Jason will use it as reference material when responding to user queries, improving the accuracy of his answers.



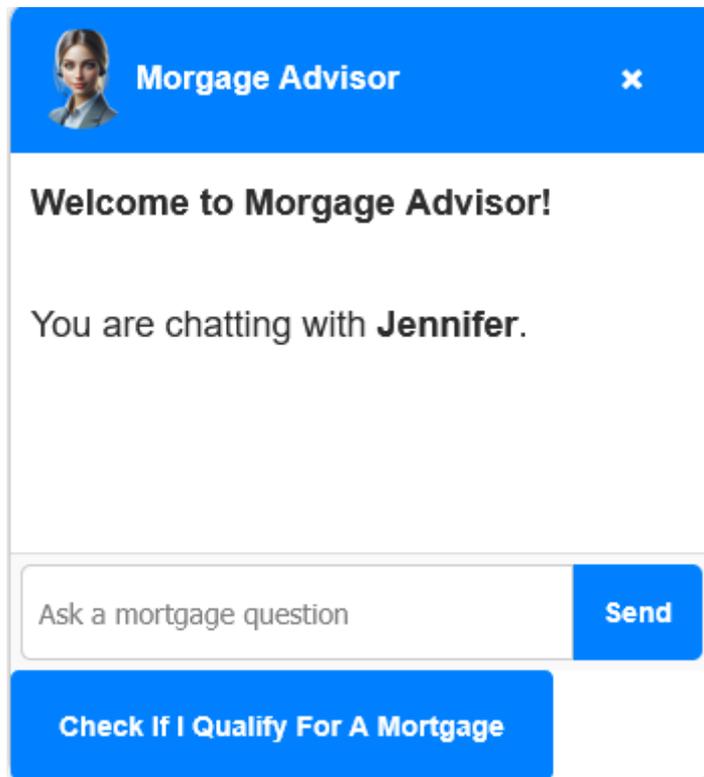
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Step 5: Using the Chatbot on Your Website

Once the plugin is installed, configured, and connected to an OpenAI Assistant, visitors can start interacting with the chatbot on your website. This section explains how the chatbot works and how users can engage with it.

How the Chatbot Appears on the Website

- The chatbot remains **hidden by default**, displaying only the assistant's avatar.
- Clicking on the **avatar** opens the chatbot interface.
- The chatbot will display an **intro message** explaining its purpose.





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User Interaction with the Chatbot

- Visitors can **type questions** in the chat input box and click **Send** to submit them.
- The chatbot responds based on its training and OpenAI Assistant settings.
- Users can also click the **default question button** to quickly check mortgage eligibility. This will prompt the chatbot to take control of the conversation and ask you what it needs to complete the task.

Example Interaction

1. A visitor clicks the chatbot avatar to open the chat.
2. The chatbot greets the user:
"Hi, I'm Jason, your mortgage assistant."
3. The user types: **a question** or clicks the **"Check if I qualify for a mortgage"** button.
4. The chatbot guides the user through questions about **income, credit score, and loan amount** or answers the specific questions.
5. If applicable, the chatbot offers to **generate a mortgage estimate** as a PDF or text file.

Chatbox Features and Customization

- The **title, assistant name, and colours** can be customized in the settings.
- The **default question button** can be changed to match business needs.
- The chatbot can be styled further with **custom CSS**.

The chatbot provides an interactive way for users to **assess mortgage eligibility** and explore loan options without human assistance.



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Step 6: Security and Best Practices

To ensure the WP Chatbot Assistant functions securely and efficiently, follow these best practices when using the plugin.

Protecting Your OpenAI API Key

- The plugin securely stores the API key in the WordPress database and uses server-side requests to communicate with OpenAI so your API key is never revealed in the public facing code.

Restricting Assistant Responses

- The chatbot only answers **mortgage-related queries**, as defined in the assistant's instructions.
- If users ask unrelated questions, Jason responds with: **"Sorry, I can't help with that."**
- This prevents misuse and ensures the chatbot stays on-topic. It is important to ensure that users cannot abuse the AI power available so restricting to a narrow subject is required.

Limiting Data Exposure

- Only select **relevant posts and pages** when exporting website content to train the assistant.
- Avoid including **sensitive or private data** in the uploaded training files.

Regularly Updating the Plugin

- Keep the plugin updated to ensure compatibility with **new OpenAI API versions**. Check your download page for updates.
- Future updates may include **performance improvements, security enhancements and additional functionality**.



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By following these steps, you can ensure that the chatbot remains secure, reliable, and aligned with business objectives.