AI Concierge

Quick Start Guide

Everything your team needs to install, configure, and go live

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WHAT IS AI CONCIERGE?

AI Concierge is a WordPress plugin that adds a persona-driven virtual representative to your website. Unlike a standard chatbot that answers questions from a fixed list, or a RAG agent that retrieves content, AI Concierge maintains the full conversation across every turn, detects who the visitor is and what they want, routes them silently to the right specialist persona, captures their contact details when they are ready to engage — and takes real action on their behalf through agentic tools.

The widget greets visitors proactively, suggests relevant questions, converses naturally in their language, and hands off to a human at exactly the right moment — automatically, around the clock, without requiring any ongoing management.

The Right Mental Model Think of AI Concierge as a virtual front desk: a team of specialist representatives — a Sales Guide, a Support Specialist, a LatePoint Booking agent, and any custom personas you create — managed by a Dispatcher who greets every visitor and routes them to the right person. Visitors never see the routing. They experience a conversation that seems to understand exactly what they need.

BEFORE YOU INSTALL — TWO HARD REQUIREMENTS

Requirement 1: AI Navigator Must Be Installed and Indexed AI Concierge has no search or knowledge engine of its own. It uses AI Navigator's semantic search index as its knowledge foundation. If AI Navigator is not installed and active with at least one indexed page, the AI Concierge widget will not appear on your site — no button, no panel, nothing. Required: AI Navigator v2.0.1 or later. The free tier is sufficient — you do not need a Pro AI Navigator license.

Requirement 2: A Valid OpenAI API Key Must Be Saved in AI Navigator All AI calls — conversation, routing, translation, escalation, template-tool reasoning — use the OpenAI key configured in AI Navigator's settings. If no key is saved, the widget will not appear. Enter your OpenAI API key at: AI Navigator → Settings → General tab → OpenAI API Key.

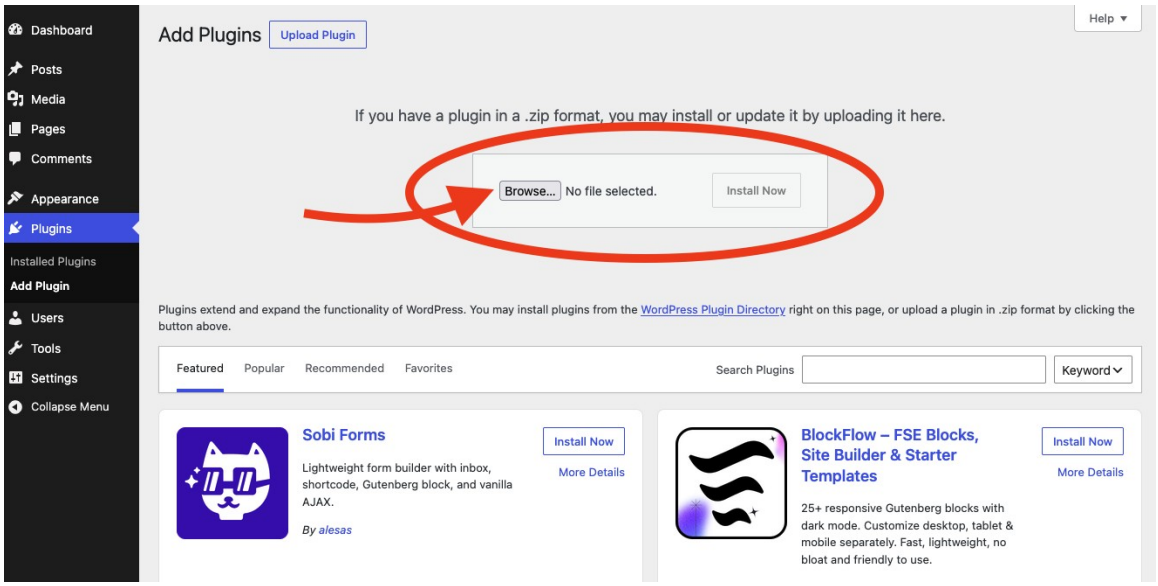
INSTALLATION

1

Install AI Navigator First REQUIRED

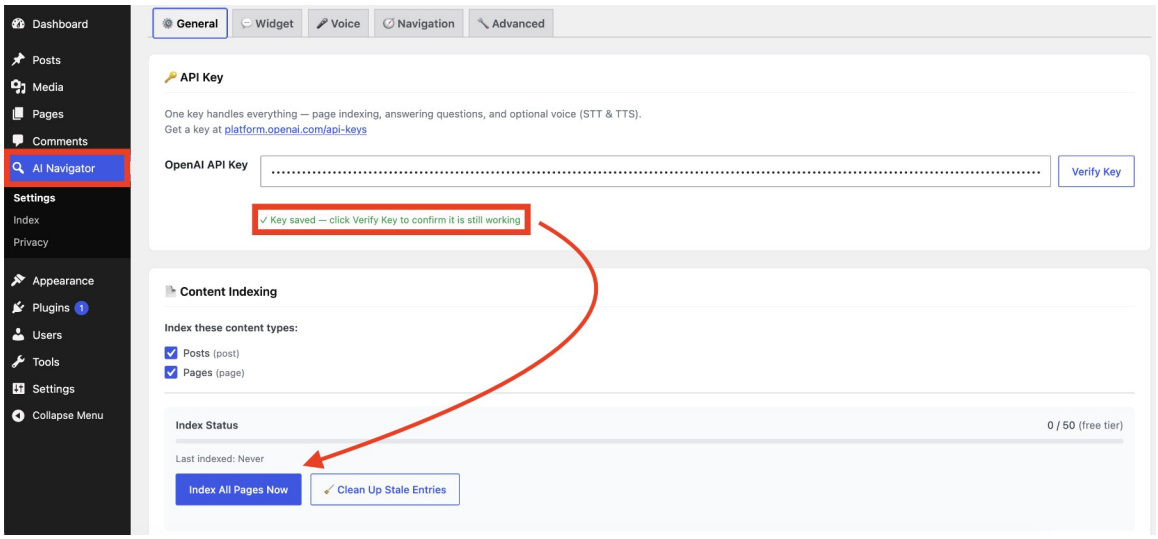
AI Concierge requires AI Navigator to be installed, activated, and indexed before it can run. Go to Plugins → Add New → Upload Plugin, select s2w-ai-navigator.zip, click Install Now, then Activate Plugin. Then go to AI Navigator → Settings → General tab, enter your OpenAI API key, click Save Settings, then click Index All Pages Now and wait for completion.

To install AI Navigator, go to Plugins → Add New → Upload Plugin, select the .zip file, click Install Now, then Activate Plugin.



Plugins → Add New → Upload Plugin

After activating AI Navigator, go to AI Navigator → Settings → General tab, enter your OpenAI API key, click Save Settings, then click Index All Pages Now and wait for completion. AI Navigator must show a green indexed status before you proceed to Step 2.



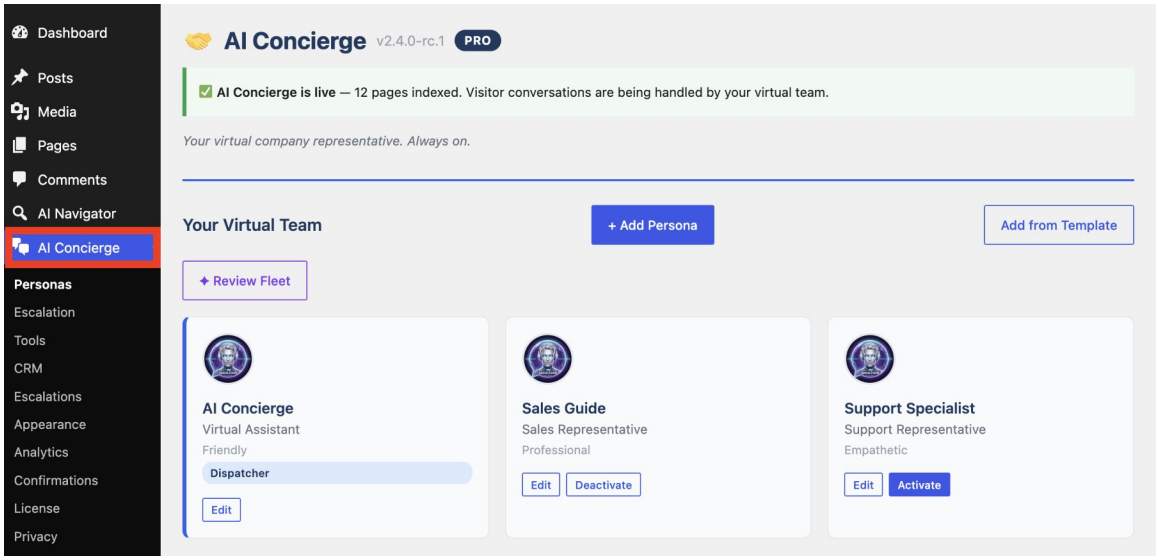
AI Navigator installed and showing a green indexed status

Having trouble with AI Navigator? Visit the AI Navigator Quick Start Guide or the FAQ at speak2web.com for step-by-step help with installation, API key setup, and indexing before continuing here.

2 Upload AI Concierge REQUIRED

Using the same Plugins → Add New → Upload Plugin method, upload s2w-ai-concierge.zip and activate it.

After activation, "AI Concierge" appears in the WordPress admin sidebar with sub-menus: Personas, Escalation, Tools, Bookings, CRM, Escalations, Appearance, Analytics, Confirmations, License, Privacy.



AI Concierge activated and visible in the admin sidebar

3 Review Your Seeded Personas RECOMMENDED

Your starter personas are created automatically on installation:

- Dispatcher — always active. Greets visitors, handles general questions, routes to specialists. Cannot be deactivated.
- Sales Guide — active on free tier. Helps prospects understand your offering, works through qualifying questions, escalates when a visitor is ready to buy.
- Support Specialist — visible but locked on free tier. Handles troubleshooting, account issues, billing. Activate with a Pro license.
- Shopping Guide — seeded only when WooCommerce is active (even if you add it later). Arrives inactive; activate it once your product pages are indexed.

Click Edit on the Sales Guide to personalize it for your business.

New: AI Advisor (Beta) Inside the persona editor, look for the AI Advisor panel. Describe what this persona should do in plain English — for example, "A friendly sales assistant who helps visitors understand our pricing and book a demo" — and the Advisor will draft all configuration fields for your review. You can apply fields individually or all at once, then edit from there. AI Advisor is in beta and available to all users.

4 Install a Template Persona OPTIONAL

On the Personas page, click Add from Template. The Create Persona from Template dialog lists all seven templates: LatePoint Booking, Jira Support, EDD Licensing, Sales, FAQ, Onboarding, Customer Service. Click + Add next to the one you want. A pre-configured persona appears in your Personas list with goal, topics, rules,

escalation triggers, and tool assignments already populated. Protected fields are locked to preserve the template's behavioral invariants — everything else is editable.

AI Gateway Required for LatePoint, Jira, and EDD Templates The LatePoint Booking, Jira Support, and EDD Licensing templates use live integrations that run through AI Gateway. Without AI Gateway installed and configured, these templates will install but their agentic tools will not function — the persona will not be able to look up orders, create tickets, or apply licenses. If you plan to use these templates, download AI Gateway and follow its Quick Start Guide at speak2web.com before proceeding. The Sales, FAQ, Onboarding, and Customer Service templates do not require AI Gateway.

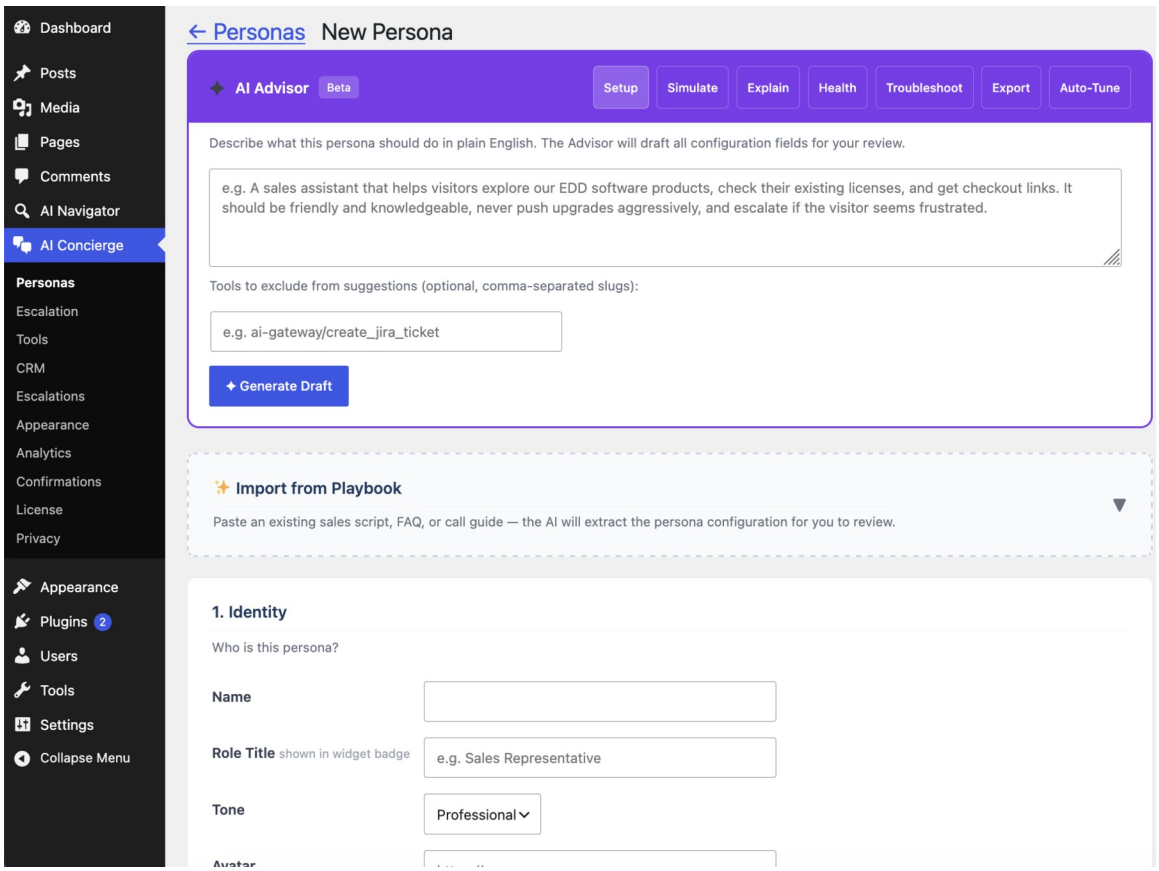
Templates are ship-ready starting points. The locked fields protect the invariants that make the template work. You can rename, change tone, customize greetings, add qualifying questions, and rewrite topics freely without breaking the template's core behavior.

5 Personalize a Persona RECOMMENDED

Open the Sales Guide (or any custom or template persona) and work through the 7 sections:

- Identity — update the name (e.g., "Alex") and role title to match your brand.
- Goal — write one sentence: who this persona serves + the desired outcome + the next step.
- Approach — describe how to open conversations and when to escalate.
- Qualifying Questions — add 2–4 questions your sales team would normally ask.
- Topics In — list what this persona handles (pricing, features, demos, comparisons).
- Topics Out — list what it should not handle (billing issues, technical support).
- Rules — add 2–3 always/never rules for tone and content.

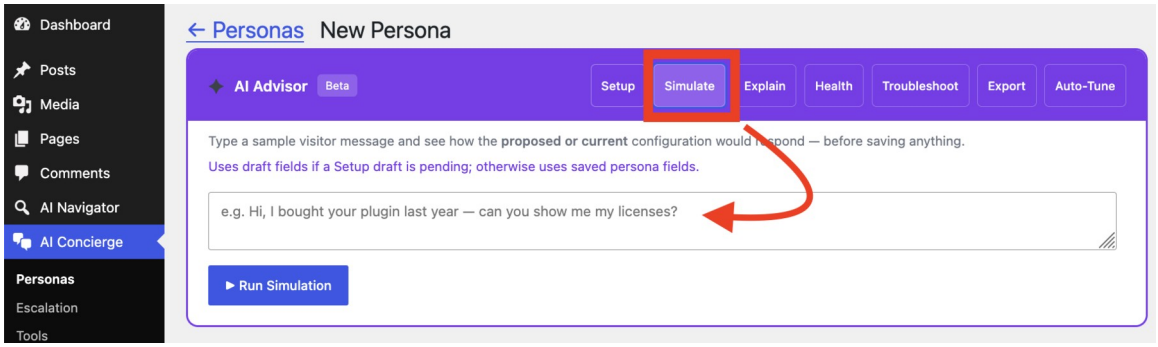
Click Save Persona when done. Use the AI Advisor to draft or refine any section.



Persona editor — all 7 sections visible

6 Test with AI Advisor RECOMMENDED

After saving, the AI Advisor panel appears below the persona form. Click the Simulate tab and start a test conversation — ask questions as if you were a real visitor. If responses feel off, switch to the Health Check tab. The Advisor analyzes your persona configuration and flags specific gaps — weak goal statements, under-specified topics, missing escalation triggers — with suggestions for improvement. Make edits, save, and simulate again until the persona behaves as expected.



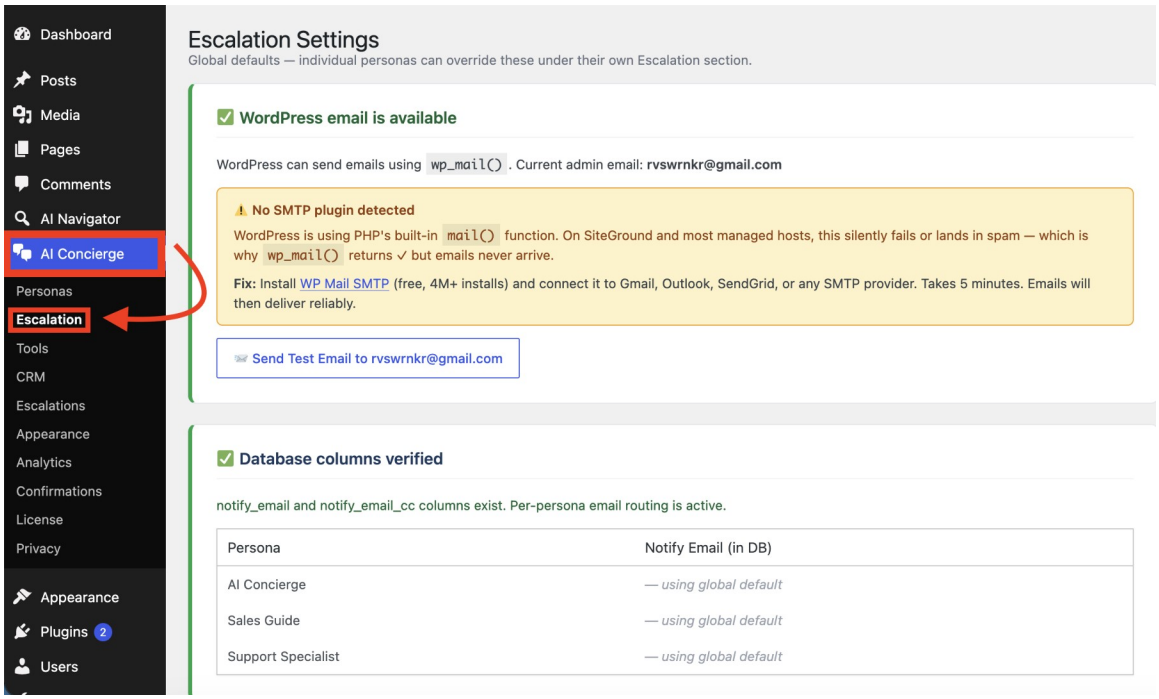
AI Advisor — Simulate tab active below the persona editor

7 Configure Escalation Settings OPTIONAL

Go to AI Concierge → Escalation and configure:

- Notification email — where escalation alerts are sent (defaults to WordPress admin email).
- CC email — optional additional recipient (Pro).
- Visitor confirmation — whether to send the visitor a confirmation email after escalation.
- Webhook URL — optional endpoint for Zapier, Make, or a custom integration (Pro).
- Slack OAuth — connect a Slack workspace and choose a notification channel (Pro).

SMTP Required for Escalation Emails WordPress's default email sending is unreliable on most hosts and will not work in production. To receive escalation notification emails and send visitor confirmation emails, your site must have a working SMTP setup. Install an SMTP plugin (such as WP Mail SMTP) and configure it with your email provider credentials before relying on email escalations.

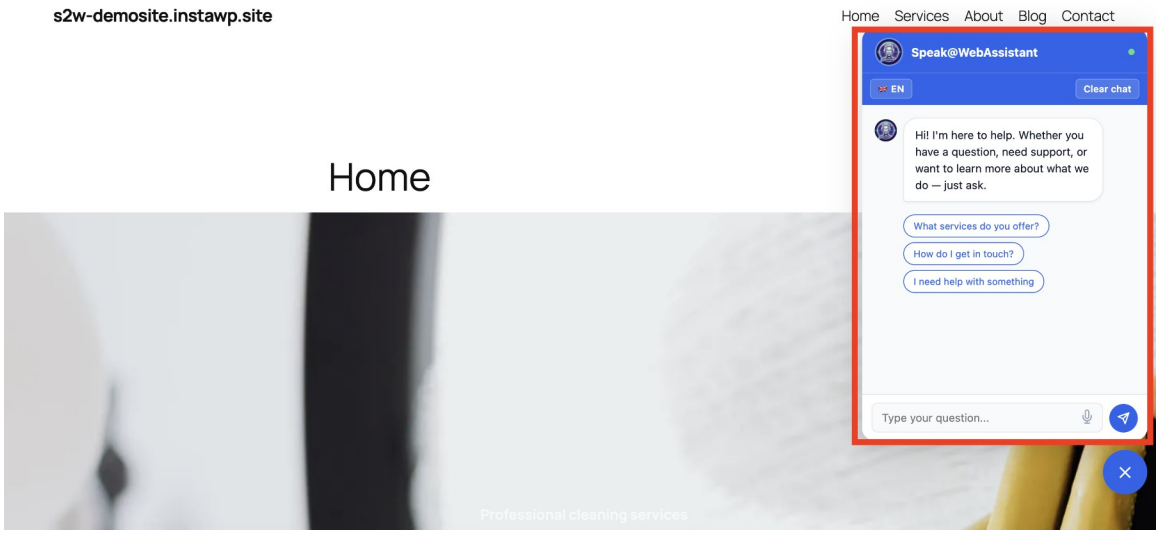


AI Concierge → Escalation page

8 Confirm the Widget Is Live REQUIRED

Open your website in a private or incognito browser window. The AI Concierge widget should appear as a button in the corner of the screen. Click it and introduce yourself as if you were a new visitor. Confirm the Dispatcher greets you and responds correctly.

If the widget does not appear, check that AI Navigator is still active and has at least one indexed page, and that at least one non-Dispatcher persona is active.



Live AI Concierge widget on the front-end of the site

WHAT'S NEXT?

After your first live widget, recommended next steps:

- Try a template persona — the fastest way to reach production quality. LatePoint, Jira, and EDD templates are especially high-leverage when your site already uses those plugins (requires AI Gateway).
- Add more personas (Pro) — identify your top 2–3 visitor types and create specialist personas for each. Use AI Advisor Setup mode to generate a starting configuration quickly.
- Enable Agentic Tools (Pro) — give personas the ability to look up live data during conversations. WooCommerce order tracking, EDD license lookups, and AI Gateway MCP integrations are available out of the box.
- Connect your CRM (Pro) — link Salesforce or HubSpot so every escalation is automatically logged and CRM contact context is injected into conversations with returning visitors.
- Review Analytics (Pro) — after a week of live traffic, open Analytics → Persona Scorecard to see sentiment scores, blind spot queries, escalation patterns, and template-tool outcomes.
- Run Fleet Review (Pro) — use the AI Advisor Fleet Reviewer to analyze all your personas together and identify gaps and conflicts across your virtual team.

APPENDIX A — FREE VS. PRO

Feature	Free	Pro
Dispatcher + active personas	Dispatcher + 1	Dispatcher + unlimited
Persona editor (7 sections)	✓	✓
Persona templates (7 included)	✓	✓
Confirmation audit log	✓	✓
AI Advisor (6 modes)	✓	✓
Playbook Import	✓	✓
Live Persona Preview	✓	✓
Escalation capture	✓	✓
Escalation history	✓	✓
GDPR / right-to-erasure / WP-CLI	✓	✓
Multilingual mode	✓	✓
Pages indexed (via AI Navigator)	Up to 50	Unlimited
Analytics dashboard	—	✓
AI Advisor Pro (Fleet Reviewer, Auto-Tuner, Revision History)	—	✓
Voice input (Whisper)	—	✓
Custom avatar per persona	—	✓
Webhooks (Zapier, Slack, etc.)	—	✓
Native Slack OAuth integration	—	✓
Agentic Tools (WordPress Abilities API)	—	✓
AI Gateway integration	—	✓
CRM Integration (Salesforce + HubSpot)	—	✓

APPENDIX B — AI ADVISOR MODE REFERENCE

AI Advisor — Your Built-In Persona Coach

Every installation includes the AI Advisor — an in-admin AI assistant that helps you design, test, and optimize your personas using your own OpenAI key. It never writes to the database directly; everything it suggests must

be reviewed and saved through the normal persona form. The AI Advisor panel appears below the persona editor after a persona has been saved.

Mode	What It Does
Setup	Generates a complete persona configuration from a plain-English description of your business and goals. Apply individual fields or all at once.
Simulate	Starts a test conversation with the current persona configuration. See exactly how the persona will respond to real visitor questions before going live.
Explain	Analyzes the saved persona configuration and explains what the AI will do in plain English — useful for team members who did not write the persona.
Health Check	Audits the persona configuration against best practices. Flags weak goal statements, under-specified topics, missing escalation triggers, and conflicting rules.
Troubleshoot	Diagnose a specific problem. Describe the symptom and the Advisor identifies the likely cause and the configuration change that will fix it.
Export	Generates a clean, shareable version of the persona configuration — useful for documentation, team review, or backup.

Pro: Fleet Reviewer, Auto-Tuner, and Revision History Pro subscribers also get three advanced AI Advisor modes: Fleet Reviewer (cross-persona conflict and gap analysis for your entire team at once), Auto-Tuner (analytics-driven optimization suggestions when a persona has 10+ conversation sessions), and Revision History (save up to 10 versions of a persona and restore any of them with one click).

APPENDIX C — WHAT'S NEW SINCE V2.1.11

Recent Changes

Version	Change
v2.5.0	• **WooCommerce Shopping Guide persona** — when WooCommerce is active, AI Concierge seeds a ready-made Shopping Guide persona for product questions, with the six WooCommerce tools already assigned and a rule never to invent pricing or stock. Sites that add WooCommerce later get it too. It arrives inactive — activate it once your product pages are indexed. • **Booking verification options** — a new Bookings settings page with two independent controls. "Require login" (off by default) stops anonymous visitors booking, cancelling, or rescheduling; "email confirmation" (on by default) holds the booking, cancellation, or reschedule as a pending action until a single-use link (one-hour expiry) sent to the booking's email address is clicked. Logged-in visitors whose account email matches skip the round-trip. • **Personal booking data is verified by default** — email verification now also covers personal reads, so a merely claimed email cannot reveal someone else's schedule. Clicking any confirmation link marks the chat session verified for that address for a day. Calendly and Acuity book, reschedule, and cancel operations are held by the same gate; discovery tools such as services and availability stay open to everyone. • **Tool authorization enforced in code** — a persona can now only run the abilities actually assigned to it, checked in PHP rather than implied by the system prompt. Identity-scoped WooCommerce, EDD, and profile lookups require a signed-in visitor and run as that visitor, so a caller only ever sees their own orders and licenses. • **Usage limits on anonymous endpoints** — chat is capped per session (30) and per IP (120) in a five-minute window, greeting translation and chip clicks are capped per IP, and escalation email is rate-limited per session and per recipient with a 30-minute default window, so one visitor cannot drain your OpenAI credits or relay unbounded mail. • **Stronger credential and key handling** — stored integration credentials use authenticated encryption, so a tampered value is rejected instead of silently mis-decrypting, and plaintext is never stored as a fallback. The confirmation key is kept in a WordPress option instead of being written into wp-config.php; existing installations keep working unchanged. • **Injection and redirect hardening** — navigation and add-to-cart links are pinned to your own site, indexed page content is labelled untrusted in the prompt, the widget accepts messages only from its own parent page, and confirmation CSV exports neutralize spreadsheet formula injection. • **Truthful commerce and booking answers** — add-to-cart links are only offered for product ids returned by a commerce tool, and the widget no longer presents another day's appointment slots as today's. • **AI Advisor beta** — describe a persona in plain English; the Advisor drafts all configuration fields for review. Available to all users.
v2.3.28	Shared S2W_INFRA_VERSION = 1_2 — AI Concierge, AI Navigator, and AI Gateway share a versioned updater class. Daily telemetry cron prunes stale counter options.
v2.3.27	Uninstall cleanup overhaul — Slack OAuth tokens, HubSpot/Salesforce runtime tokens, CC email, template-locks version, and per-user CRM meta all swept on delete.
v2.2	Template persona system — ship-ready LatePoint, Jira, EDD, Sales, FAQ, Onboarding, and Customer Service templates with locked behavioral invariants.
v2.2	Confirmation audit log — every template-tool action (book, ticket, license apply) captures an encrypted, HMAC-protected audit row. Exportable CSV.
v2.2	WP-CLI commands — scriptable right-to-erasure (wp aic erase) and privacy data audit (wp aic audit).

Questions? Visit **speak2web.com** or open AI Concierge → AI Advisor → Troubleshoot for in-admin help.