SiteSellerAI
Full Setup Manual

Dex and Sophie

Get Dex connected first, then configure the knowledge, offers, rules and public experience that Sophie uses with your visitors.





Dex helps inside WordPress. Sophie helps your website visitors.

Complete page reference

Setup steps, field explanations, saved settings, connection checks and practical examples for every current AI Console page.

For SiteSellerAI 0.1.6
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Contents

Select a chapter to jump to it. Use the guide in order for a new installation, or go straight to the screen you are configuring.

01 Installation and API access 3

02 Start with Dex 5

03 Dashboard your command centre 6

04 Assistant Mode activation API and behaviour 9

05 Using Dex day to day 13

06 Knowledge Sources 15

07 Products and Offers 18

08 Sales Rules 22

09 Comparison Rules 26

10 Support Rules 29

11 Widget Designer 31

12 Logs and Training 34

13 Dex data connections and website intelligence 38

14 Sophie launch check 45

15 Core setup troubleshooting 46

In WordPress, open AI Console. The installed plugin is named AI Sales Console.

01 Installation and API access

This manual helps WordPress administrators set up SiteSellerAI from the first Dex conversation through to Sophie's public launch. Start with the installation and OpenAI connection, get Dex replying, then use his guidance and the page reference chapters to finish the configuration.

Assistant	Where you use them	Main role
Dex	Inside WordPress admin	Explain setup, inspect available website and app context, interpret connected reports and help with supported website improvements.
Sophie	On your public website	Help visitors understand your products or services, compare suitable offers, find information and reach your sales or support destination.

The WordPress plugin name is **AI Sales Console**. Its sidebar menu is **AI Console**. This manual uses those exact names when giving navigation instructions. The field reference describes version **0.1.6**; saved settings on an existing installation can differ from new-install defaults.

Before installation

Have your SiteSellerAI plugin ZIP and a WordPress administrator login ready. The plugin requires WordPress **6.0 or later** and PHP **8.0 or later**. WooCommerce is needed when you want to use a WooCommerce catalogue; manual offers also support products and services sold elsewhere.

You need an OpenAI API account with billing or credits available and access to the selected model. Google, Bing and SerpApi accounts are optional later connections. They are not required to start talking to Dex.

Install SiteSellerAI

1. Sign in to your WordPress administration area.
2. Open **Plugins** and choose the option to add a plugin.
3. Select **Upload Plugin**, choose your SiteSellerAI ZIP and click **Install Now**.
4. Click **Activate Plugin**. Confirm that **AI Console** appears in the sidebar.
5. Open **AI Console > Assistant Mode** to connect OpenAI and enable Dex. If the plugin is already active, continue from this step.

Create your OpenAI API key

1. Sign in to OpenAI Platform.
2. Open API billing. Complete billing setup and add credits if prompted.
3. Open API keys, create a key and copy it.
4. In WordPress, paste it into **AI Console > Assistant Mode > OpenAI & Conversation Behaviour > OpenAI API key**, then save using **Save Assistant Mode Settings**.

A ChatGPT subscription does not include OpenAI API usage. API usage is billed separately by OpenAI. Keep the key private and enter it only in the credential field, not in a Dex or Sophie conversation.

The blank key box after saving is normal. The **Saved** indicator confirms that a key is stored. A successful new Dex response is the practical check that a conversation request can use it.

Follow the setup order

First enable Dex and send a message. Then prepare your knowledge and offers, choose the conversation and support rules, design Sophie's widget and test her public replies. Add external reports when you need them.

Dex helps you understand and complete the steps. You enter private credentials, authorise external accounts and save their settings. For supported website edits, review the proposed action and approve the specific change before it is applied.

The chapters follow this route while also serving as a reference. Use the contents links or your PDF viewer's bookmarks to jump to the page you are working on.

02 Start with Dex

Dex helps inside WordPress admin; Sophie helps your website visitors. Connect Dex first, then use his guidance to prepare Sophie's knowledge, offers, rules and appearance.

Your first successful conversation

You need the activated **AI Sales Console** plugin, an administrator account and an OpenAI API key with access to your selected model. Google, Bing, SerpApi and the knowledge index can wait.

1. In WordPress, open **AI Console > Assistant Mode**.
2. Leave **Quick setup preset** on **Do not apply preset**.
3. Under **Assistant Activation**, set **Enable admin assistant** to **On**. Keep **Enable front-end assistant Off** while you prepare Sophie.
4. Find **OpenAI & Conversation Behaviour**. Paste your key into **OpenAI API key**. Leave **Model selection** at **GPT-5.4**, the supplied default, or select another displayed model available to your OpenAI project.
5. Under **Admin Assistant Permissions**, select the preferences for reading site settings, products and knowledge, and suggesting page/product improvements. Add conversation logs if needed. **Require approval before changing anything** stays checked. Chapter 04 explains every permission and its limits.
6. Click **Save Assistant Mode Settings**. Confirm the green message **Assistant Mode settings saved.** The cards should show **Admin Assistant: On**, **OpenAI API Key: Saved** and **Front-end Assistant: Off**.
7. Click **Ask Dex** at the bottom right of WordPress admin. Enter the message below and click **Send**.

   Dex, help me configure Sophie one page at a time. Explain the next missing setting, its fields and save button. Keep Sophie off until I am ready for visitor testing.

A relevant new reply confirms a live request worked. The welcome greeting, **Saved** badge and Dashboard **Online** label alone are not connection tests.

The API-key box clears after saving. Leave it blank to keep the saved key; enter a key only when replacing it.

Let Dex guide the remaining setup

Tell Dex what you sell, who your customers are and what visitors should do next: buy, book, request a quote or contact you. Open each page he identifies, enter the details, save, then tell him what you completed.

You enter credentials, connect accounts and save configuration forms. Dex explains settings and inspects available context; he does not automatically control every setting. Supported page drafts and page edits use their own review and approval controls.

03 Dashboard your command centre

Open **AI Console** in the WordPress menu. The Dashboard brings together setup progress, your model, indexed knowledge, Sophie's public status and recent assistant activity. The left-hand **API Key** shortcut opens the API field on **Assistant Mode**; **Configure AI** and **Model and API settings** open the same settings page.

Understand the status cards

Card	What it shows	What to do with it
Setup Status	Four checks: API key present, assistant mode chosen, knowledge indexed and Sophie enabled. Each contributes 25%.	Use it to track preparation. Dex can be working while the percentage is below 100%, because Sophie may intentionally remain off.
AI Model	The saved model and whether an API key is configured.	Open **Model and API settings** to change the key or model. Send Dex a message to test a real request.
Knowledge Index	Indexed item total plus Pages, Products and Docs & media counts.	Open **Manage** to choose sources. **Build Assistant Brain** rebuilds the index. Counts describe what the assistant has indexed, not content quality or search rankings.
Sophie Widget	Live or Offline status, the selected dashboard mode and workflow summary.	Open **Customize Widget** to prepare the public widget. Offline is expected while you are setting up Dex first.
Products & Offers	Published WooCommerce products and saved manual offers.	Open **Open products & offers** to choose what Sophie should recommend. This card does not create or edit store products.
Recent Activity	The latest tracked events, the assistant involved and their approximate times.	Open **View logs** or **Open Training** for the detailed activity and training pages. This is a recent feed, not a total-sales counter.

The summary strip also shows **Current mode**, **Knowledge items**, **Workflows** and **Last scan**. Suggested workflow counts are a setup summary; inspect the actual rules and offers before relying on them in public replies.

Buttons and their effects

Button or link	Result
Start Setup / **Start Smart Setup**	Selects Auto Smart Setup and marks the setup as needing a scan. It does not run the scan or activate Sophie.
Run Smart Scan / **Build Assistant Brain** / **Re-scan Site**	Builds the knowledge index and refreshes the setup summary. These are entry points to the same scan process.
Approve All Safe Suggestions	Marks the reviewed setup as ready to publish. Check the suggestions, claims and destination links yourself before using it.

Button or link	Result
Publish Assistant / **Publish Widget**	Enables the public Sophie assistant after the dashboard setup has been marked Ready. You do not need this button to use Dex.
Preview Site	Opens your public homepage in a new tab. It is not a private testing environment.
Open Advanced Setup	Opens Assistant Mode for manual settings.
Open Dex Data / **Open Dex workspace** / **Ask Dex in his workspace**	Opens the Dex workspace and data connections. The floating **Ask Dex** launcher opens the chat panel.
Review Manually	Opens Products / Offers so you can inspect your offer information.
Prepare Sophie widget	Opens Widget Designer.
Manage knowledge source	Opens Knowledge Sources.
Open activity logs / **View logs** / **Open Training**	Opens Logs / Training.
WordPress dashboard	Returns to the main WordPress admin dashboard.

The dashboard setup sequence

After your Dex conversation is working, use **Start Smart Setup** if you want the general guided route. Click **Run Smart Scan**. A successful scan reports the number of indexed items and moves the setup to **Needs review**.

Inspect **AI Found / Needs Review**. Check the detected business type, main offers and suggested workflows. Verify the product claims and purchase, demo, booking or support links in the relevant configuration pages. A scan prepares a summary and an index; it does not replace accurate product data, approved rules or testing.

Click **Approve All Safe Suggestions** when the review is complete. The state changes to **Ready**. Use **Publish Assistant** only when Sophie is ready for visitors. This changes the state to **Published** and turns the front-end assistant on.

Setup state	Meaning
Needs scan	Run or rerun the knowledge scan.
Needs review	The scan found knowledge; inspect the resulting setup summary and relevant configuration.
Ready	The dashboard approval step is complete and publication is available.
Published	The dashboard publication action has enabled Sophie. Check the public site to verify the actual widget and replies.
Advanced setup	The Custom / Advanced dashboard route was selected. Configure the required pages manually.

To stop Sophie appearing, open **Assistant Mode**, set **Enable front-end assistant** to **Off**, and click **Save Assistant Mode Settings**. Keep **Enable admin assistant On** to continue working with Dex. A

previously saved Published workflow state does not replace checking the actual front-end On/Off setting.

Dashboard Quick Setup Presets

These cards choose the assistant's main job. Selecting one marks the dashboard setup as needing a scan, except **Custom / Advanced**, which selects Advanced setup. They are separate from the presets on the Assistant Mode page.

Dashboard preset	Best use and intended behaviour
Auto Smart Setup	General setup. Uses the business and content context to guide sales, support, recommendations or documentation help.
Sales Assistant	Guides buying conversations, suitable offers, objections and the next purchase action.
Support Assistant	Prioritises documentation, setup instructions, issue details and support handoff.
Sales + Support	Helps new buyers and existing customers while keeping those conversations distinct.
Product Recommender	Uses preference questions and product differences to help visitors choose.
Booking / Lead Capture	Qualifies service enquiries and directs visitors to the correct booking or contact route. It does not by itself create an external booking integration.
Documentation Helper	Finds and explains documentation with sales pressure kept out of ordinary help requests.
Technical Setup Helper	Focuses on configuration steps and troubleshooting. This is a behaviour preset, not the switch that enables Dex.
Custom / Advanced	Leaves detailed configuration to the separate settings pages.

The **Selected mode runtime behaviour** section describes the intended response sequence: read the visitor's message, identify intent, use the chosen mode and relevant approved knowledge, ask a useful question when needed, and choose a suitable next action.

04 Assistant Mode activation API and behaviour

Open **AI Console > Assistant Mode**. This page saves your activation choices, site type, conversation behaviour, shared OpenAI connection and admin-assistant preferences. Use **Save Assistant Mode Settings** at the bottom after making changes.

The four cards at the top show the saved **Front-end Assistant**, **Admin Assistant**, **OpenAI API Key** and **Site Mode**. They update after saving. The **Current Behaviour Summary** at the side repeats your goal, sales positioning, personality, conversation style and lead-capture setting.

Quick Setup

Quick setup preset starts on **Do not apply preset**. Leave this selected when manually configuring Dex or changing individual settings.

Selecting a real preset and saving replaces the settings included in that preset. It also turns both Dex and Sophie **On**. If you need Sophie to remain off, do not apply a preset during the Dex-first setup. If you apply one later, return to the page, leave **Do not apply preset** selected, set the front-end assistant **Off** and save again if public launch is not yet intended.

Preset	Site and goal	Behaviour selected
WooCommerce Product Store	WooCommerce products; balanced sales and support.	Friendly, soft recommendations, guided questions, lead capture on, clarifying question before handoff.
App / Plugin / SaaS Seller	Website product / app / plugin; balanced sales and support.	Sales-focused, strong sales assistant, consultative replies, lead capture on, support URL handoff.
Service Business	Services; lead capture only.	Professional, strong sales assistant, guided questions, lead capture on, contact details before handoff.
Documentation / Support Assistant	Information / documentation only; documentation only.	Technical, neutral helper, detailed replies, lead capture off, support URL handoff.
Lead Capture / Quote Assistant	Mixed mode; lead capture only.	Friendly, strong sales assistant, guided questions, lead capture on, contact details before handoff.

Each preset chooses GPT-5.4 and its own admin-assistant preference set. It does not supply your API key or support URL. After the preset is saved, the dropdown returns to **Do not apply preset**, so later manual edits are not continually reset.

Assistant Activation

Field	Choices and purpose	Fresh-install default
Enable front-end assistant	**On** allows Sophie to appear on the public site, subject to widget display settings. **Off** keeps her unavailable to visitors.	Off

Field	Choices and purpose	Fresh-install default
Enable admin assistant	**On** allows authorised WordPress administrators to use Dex. **Off** disables his admin chat.	On

These switches are independent. Turning Dex on does not require turning Sophie on. Existing saved settings are retained when the plugin is loaded again.

Business Type and Goal

Site selling mode describes the source and type of your offers. Choose **WooCommerce products** for a native store catalogue; **Website product / app / plugin** for apps, plugins or products presented on website pages; **Services** for service businesses; **Information / documentation only** for a help resource; or **Mixed mode** when your site combines these roles. The initial fallback is Mixed mode.

Assistant goal sets the response priority. The choices are **Sell first**, **Support first**, **Balanced sales and support**, **Documentation only** and **Lead capture only**. Balanced sales and support is the initial fallback. Align this with the dashboard role and the detailed Sales Rules and Support Rules so your instructions point in the same direction.

Sales Positioning controls how strongly Sophie recommends suitable offers:

Choice	Behaviour
Neutral helper	Answers without pushing a purchase.
Soft recommendation	Recommends an offer when it is relevant. This is the initial fallback.
Strong sales assistant	Asks questions and actively recommends suitable products or services.
Aggressive closer	Strongly directs a suitable conversation toward purchase, demo or contact while remaining truthful.

The **Truth Rule** still applies at every setting: do not invent specifications, results or competitor claims.

Assistant personality sets tone. Choose **Professional**, **Friendly**, **Direct**, **Technical**, **Sales-focused** or **Support-focused**. Professional is the initial fallback. Personality changes the style of the answer; it does not create missing product facts or new actions.

OpenAI and Conversation Behaviour

Field	What to enter or choose	Save and expected effect
OpenAI API key	Your API key. The password-style field hides the value and is blank after saving.	A nonblank value replaces the saved key. Blank keeps the existing key. There is no delete-key control on this page.
Model selection	The displayed choices are **GPT-5.4**, **GPT-5.5**, **GPT-5.4 Mini** and **GPT-5.4 Nano**. The supplied default is GPT-5.4.	Select a model your OpenAI project can access, save, then test with a new Dex message. The key and model are shared by the plugin's AI requests.

Field	What to enter or choose	Save and expected effect
Conversation style	**Concise and direct**, **Guided questions**, **Consultative**, **Detailed explanations** or **Technical walkthrough**.	Sets the preferred answer format. The initial fallback is Consultative.
Lead capture	**On** or **Off**.	On allows requests for relevant contact details during handoff or follow-up. It is not a promise of an email, CRM or booking connection. Initial fallback: Off.
Support handoff behavior	**Show support / contact URL when needed**, **Ask a clarifying question before handoff**, **Capture lead details before handoff**, or **Send user directly to support / contact page**.	Controls how the assistant moves a visitor to human help. The first choice is the initial fallback.
Support / contact URL	The complete destination URL, such as your actual support or contact page.	Gives the assistant a known destination. Open the URL yourself to confirm it is the correct page. Initial value: blank.

Choose the conversation style to match the task. Guided questions suits qualification or troubleshooting; concise replies suit simple enquiries; detailed explanations and technical walkthroughs suit setup help. The available evidence and your saved rules still determine what the assistant can responsibly say.

Admin Assistant Permissions

This section records your preferences for Dex's reading and suggestion work. Select the areas relevant to your setup.

Visible preference	Intended purpose
Allow admin assistant to read site settings	Inspect configuration when explaining setup or diagnosing an issue.
Allow admin assistant to read product data	Use product and offer information in admin guidance.
Allow admin assistant to read knowledge sources	Review indexed content and source coverage.
Allow admin assistant to read conversation logs	Use previous interactions when investigating answers or training needs.
Allow admin assistant to suggest page/product improvements	Include practical improvement recommendations.
Require approval before changing anything	Remains checked and locked on. Supported changes use their own review and approval actions.

These preferences do not create general settings-write access. They also should not be treated as a separate privacy boundary for every available reader: Dex's access is tied to the authorised

administrator and the connected sources. Give access to WordPress admin only to people who should be able to inspect that context.

The page contains older "suggestion-only" wording. The practical distinction is that setup guidance does not silently save forms, while supported page drafts and approved page edits use explicit action controls described below.

Save and verify

Click **Save Assistant Mode Settings**, look for **Assistant Mode settings saved.**, and recheck the top cards and **Current Behaviour Summary**. Open Dex and send a new question. When replacing the API key or model, use a short, fresh setup question to verify the change worked.

There is no separate **Test Connection** button on this page. A newly generated response is the useful connection check.

05 Using Dex day to day

Chat controls

Click **Ask Dex** to open his admin panel. Type your message and press **Send** or **Enter**. Use **Shift+Enter** for a new line. **Dex is checking...** indicates the request is in progress.

The **×** button closes the panel without intentionally resetting the conversation. **Clear chat** resets the conversation and the current pending task state. It does not undo an applied page edit or erase the activity log. If the reset cannot be confirmed, the panel reports the problem and keeps the visible conversation.

Quick prompts and reports

Quick buttons place a prepared question into the input. Review or edit it, then click **Send**.

Button	Use it for
Check setup	Inspect the AI Console setup and identify what needs attention.
Training	Improve knowledge coverage and search results.
SEO	Discuss site optimisation and conversion using available evidence.
Google	Inspect available Analytics, Search Console, Site Kit and PageSpeed context.
Bing	Inspect available Bing Webmaster, crawl, keyword and visibility context.
SERP	Inspect available SerpApi checks, AI Mode prompts and target-domain visibility.
Debug	Investigate widget, API, REST or performance problems.
SEO report	Request prioritised optimisation actions with sources, affected pages and reasons.
Sales report	Review the funnel, offers and routes from interest to action.
Speed report	Request page-speed findings and practical next steps.
Keyword report	Map available query and ranking evidence to relevant pages.
AI visibility report	Review available AI-search visibility evidence and identify missing data.

The reports can only use accessible data. Connect a service in the Dex workspace when you need its evidence. A missing connection does not prevent ordinary setup help.

Ask for one clear result

Useful setup prompts include:

- "Read this settings page and explain what I need to enter in each field."
- "Inspect my saved offers and tell me what information Sophie is missing."
- "Help me choose knowledge sources for these products and support guides."

- "Check whether my sales and support rules contradict each other."
- "Tell me the next setup step. Give me the exact menu, fields, save button and expected result."

When a task concerns a particular page or product, include its exact name or URL. If you want a report only, say so. If you want a proposed edit, identify the scope and the details that must stay unchanged.

Page drafts and approved edits

For a new page, give Dex the purpose, content requirements, exact links and available images. Specify the editor or answer his editor-format question. Review the proposed title, structure and content. When the supported draft action is offered, use **Create draft page** or **Create Elementor draft page**. A successful response includes the draft-edit link. Review the actual page before publishing it through WordPress.

For an existing page, give Dex the exact source-page URL and the change you want. He must identify supported changes against the saved page. Review the proposed changes before clicking **Apply to original page** and confirming the dialog. That action changes the original page; it can affect a page that is already public. A successful action supplies an edit link and an **Undo Dex changes** control.

Use **Undo Dex changes** for the supported previous-page-source restoration. Closing or clearing chat is not an undo action. If Dex reports that the page changed after analysis, ask him to read the current page again and review a new proposal.

For an internal-link request, identify both the **source page to edit** and the **destination page to link to**. When several source pages are involved, review and verify one source-page preview at a time.

Page approval does not automatically authorise other settings, native widgets, metadata or unrelated pages. If Dex says a requested operation is unsupported or needs a separate decision, complete that specific step through the appropriate page or editor.

06 Knowledge Sources

Open: WordPress admin > **AI Console > Knowledge Sources**.

The Knowledge Index is a searchable snapshot of public site content and resource references. This page also stores business notes that Dex can read while helping you configure the site. Refresh the index after changing relevant public pages, product information or resource links.

Set up and refresh

1. Review the **Active site mode** displayed at the top; change the actual mode in Assistant Mode if needed.
2. Tick **Enable knowledge sources for the assistant**, then review the source checkboxes.
3. Optionally choose a Quick Setup template and click **Apply quick setup**. Read and personalise all five text boxes it fills.
4. Enter your business facts, sales guidance and limits, then click **Save Knowledge Sources**.
5. The save message says the index needs refresh. Click **Refresh Knowledge Index** after saving.
6. Confirm the index status is **Current** and the displayed item count is plausible for your site. Then ask about a known public page or guide and open the returned link.

Save before Refresh. Refresh is a separate action and rebuilds from the saved configuration; it does not save unsaved text or checkbox changes. Rebuilding replaces the previous index snapshot. It does not rewrite your website pages or products.

Status and actions

Item	Meaning
Active site mode	Read-only summary of the saved/detected site mode.
Knowledge index: Not built	No completed index has been recorded. Run Refresh Knowledge Index.
Knowledge index: Needs refresh	The source settings have changed since the last build. Save any further edits, then refresh.
Knowledge index: Current	The most recent build completed. This is a build status, not a guarantee that every response will be correct.
Public knowledge items indexed	The saved item count when greater than zero. Pages and their linked video/document references can create multiple items, so this is not simply the number of pages.
Refresh Knowledge Index	Builds a new local index and returns to this page with the result count. It does not fine-tune an AI model.
Save Knowledge Sources	Saves the checkboxes and five manual text areas; marks the index Needs refresh.

Quick Setup templates

Choose quick setup template... offers **WooCommerce product store**, **Website product / app seller**, **Service business**, **Information / documentation site**, and **Mixed site**. **Apply quick setup** replaces all five manual knowledge text areas with that template's starter text. It does not save automatically and does not select the source checkboxes. Copy any existing custom text you want to keep before applying a template.

Main Knowledge Switch and Site Content Sources

Visible control	Purpose and starting value
Enable knowledge sources for the assistant	Off by default. Records permission to use stored knowledge; enable it for setup. See the current-version note below about its limits.
WordPress pages - Use published pages	On by default. Intended page-source preference.
WordPress posts - Use published posts	Off by default. Intended post-source preference.
WooCommerce products - Use published WooCommerce product information	On by default. Controls inclusion of products in the index and product matching. Products must also pass current public catalogue restrictions.
Product categories - Use WooCommerce product category information	On by default. Intended category-information preference.
Product tags - Use WooCommerce product tag information	Off by default. Intended tag-information preference.
Site identity - Use site title, tagline, and basic business identity	On by default. Intended site-identity preference.

Current-version behaviour. The source controls are not a privacy barrier. The indexer processes public post types and existing public resource references; the Pages, Posts, Categories, Tags and Site identity switches are saved but are not individually enforced by that indexer. The main switch does not suppress every non-product source. To stop public conversations, use the frontend assistant switch; do not rely on these knowledge switches to make published content private.

Manual Knowledge fields and presets

Each field has a **Choose a starter preset...** menu and **Apply preset** button. Applying a preset replaces the whole text area, including any text you already entered. **Add all presets** inserts all of that field's built-in preset texts together; it does not append to your current text. Review the result before saving.

Field	What to write	Available presets
Business notes	What the business sells, its customers, main benefits, service area and business context.	**Online store starter**; **Software / plugin starter**; **Service business starter**; **Add all presets**.
Sales instructions	How to understand the visitor's needs, explain value and lead them to an appropriate next step.	**Ask needs first**; **Comparison selling**; **Guide to next step**; **Add all presets**.
Product positioning	Which offers suit beginners, advanced users, agencies, stores or particular use cases.	**Beginner vs advanced**; **Value-based positioning**; **Use-case positioning**; **Add all presets**.
Support limits	Questions the assistant may answer and matters requiring human support.	**Standard support limits**; **Technical support limits**; **Sales support limits**; **Add all presets**.
Do not claim	Unsupported features, unavailable services, guarantees and promises that must not be stated.	**Safe claims starter**; **No legal/medical/financial advice**; **Refund/order limits**; **Add all presets**.

These fields start empty. Dex can read their saved contents. In this version, the individual text fields are not directly included in Sophie's public prompt by the knowledge settings loader. Put essential visitor-facing offer facts in **Products / Offers** and essential sales, comparison and support instructions in their dedicated Rules pages, then test Sophie. Refreshing the index alone does not convert these manual notes into public prompt instructions.

Documents videos and future inputs

The existing index can discover document and video links in your public site content and supported Media Library attachments. Give each public resource a useful title and descriptive surrounding text, caption or description, then refresh. Document references include their URL and available metadata; this is not a promise that every uploaded PDF is read page by page or that video audio is transcribed. Internal Elementor template links are removed from returned source references.

Under **Future Knowledge Sources**, **External URL knowledge** and **File upload knowledge** are disabled. They are planning placeholders, not working import controls. Do not try to paste an external website into those fields or expect a private knowledge-file upload from this page.

Test this page

Ask **"Where is the setup guide for [your product]?"** using a real product name. Expect relevant public guide/resource titles and links. Open each link. Ask a specific question supported by a public page and check the answer against that page. If a new guide is missing, verify the resource is publicly accessible, improve its title or surrounding explanation, save the page and refresh the index.

07 Products and Offers

Open: WordPress admin > **AI Console > Products / Offers**.

This page supplies the products, services and offers Sophie can recommend. WooCommerce products use live catalogue facts; manual offers let you describe software, services, plans or products sold through an external checkout. Dex can read your saved configuration and help you decide what to enter. Save your changes yourself on this page.

Set up the right commercial source

1. Choose **Main source** to describe your sales setup.
2. Set the **Allowed sources** checkboxes to match. For a WooCommerce store, enable **Allow WooCommerce products**. For an external app, service or marketplace sales page, enable **Allow manual offers** and disable **Allow WooCommerce products** if your local catalogue is not for sale. For a mixed business, enable both.
3. Set any WooCommerce restrictions, or complete and enable your manual offer cards.
4. Add your sales guidance and click **Save Products / Offers Settings**.
5. Confirm **Products / Offers settings saved.** appears, then reopen the page to check the saved values.

Use the checkboxes as well as Main source. In this version, Main source describes the intended setup to the assistant; the two Allow checkboxes determine whether the offer loader supplies WooCommerce and manual offer details. Selecting **Manual offers only** on its own does not switch off the WooCommerce checkbox. If your local WooCommerce catalogue must not inform public answers, also untick **Knowledge Sources > Use published WooCommerce product information**, save and refresh the index; indexed knowledge is a separate source.

Offer Source every control

Control	What to enter or select
Main source	**Auto detect based on site setup** is the default. Other choices: **WooCommerce products only**, **Manual offers only**, and **WooCommerce products + manual offers**. Match the source checkboxes to this selection.
Allow WooCommerce products	On by default. Includes eligible WooCommerce products when WooCommerce is active. If WooCommerce is inactive, the setting is retained but its products cannot load.
Allow manual offers	On by default. Includes enabled, named manual offers.
Allow selected site pages as offer/support sources	Off by default. Supplies permission guidance about site pages. This page has no page picker; maintain your public pages and refresh their Knowledge Index separately.

WooCommerce Product Rules

Control	Meaning, format and default
Product statuses	**Published** is selected by default. **Draft**, **Private** and **Pending review** can also be saved for admin context. Public Sophie conversations still only receive eligible published products; these boxes do not publish products or expose private products. If every status is unchecked, saving restores Published.
Product limit	Whole number **1-500**; default **50**. Caps the WooCommerce products supplied to a public answer, not the size of the catalogue that can be searched. The admin prompt has a separate maximum of 25 products. A higher limit can produce more context; it does not make every product appear in each reply.
Allowed category IDs	Optional comma-separated numeric category IDs, for example **12,18,24**. Leave blank to allow all categories. Enter IDs, not names or slugs. A product must meet this restriction as well as any product-ID restriction.
Allowed product IDs	Optional comma-separated WooCommerce product IDs, for example **101,104,205**. Leave blank to avoid a product-ID restriction. These are product IDs, not SKUs.
Allow cross-sell recommendations	On by default. Guides the assistant to suggest relevant companion products; it does not add items to a cart.
Allow upsell recommendations	On by default. Guides the assistant to suggest a suitable higher-level option; it does not create an upgrade or change a purchase.
Allow out-of-stock products to be discussed	Off by default, which limits eligible products to **in stock**. Enable only if you want unavailable products discussed. It does not restock products or change availability.

How current WooCommerce recommendations work

After you refresh the Knowledge Index, Sophie can use a visitor's question to find products across the saved product index, then read current WooCommerce product facts for the selected results. The Product limit controls the size of this answer context. General browsing requests can use eligible recent products. An item missing from one answer is not proof that the store does not sell it.

Public recommendations omit hidden, unpublished, password-protected and individual variation records. They also filter internal-looking catalogue entries using words such as test, testing, demo, dummy, placeholder, fuzzy, duplicate, internal, staging, sandbox, temp and temporary in the product name, slug or SKU. A legitimate product containing a blocked word can therefore be omitted. Allowed product IDs, allowed categories, stock rules and custom excluded terms still apply. Check these settings if a genuine product is missing.

The public catalogue gives Sophie product names, categories, displayed prices, short descriptions and public product links. Maintain those WooCommerce fields carefully. Sophie does not need a manually copied offer card for each ordinary WooCommerce product.

Manual Offers

Use one card for each offer that needs its own buyer fit, description and destination URL. A blank card is provided for adding the next offer. Fill it in and save; another blank card appears after the saved cards. There is no separate Add offer button.

Field	What it does
Enabled	Off for a new card. Tick it to make a named card available to the assistant. Untick and save to pause an offer without losing its details.
Offer name	The offer's real public name. **Required for the row to be retained:** a blank name causes that whole card to be omitted when saving.
Offer type	**Product** is the default. Other choices are **App / Software**, **Service**, **Membership**, and **Document / Guide**.
Sales headline	A short, factual description of the main benefit.
Short description	Plain-language explanation of what is included and what the offer does.
Offer URL	The complete public destination, including **https://**. Use the real product, booking, enquiry or checkout page. Open it in a private browser window to confirm it works for visitors.
Price text	Your exact public pricing wording, including currency and billing period where relevant. This is manual text, not a live checkout price; update it whenever the offer changes.
Best for	Describe suitable customer types, experience levels, platforms or use cases.
Customer pain points this solves	List the customer problems this offer addresses.
Key outcomes	Explain supported practical benefits. Keep claims consistent with your published offer.
Priority	A non-negative whole number; default **10**. Lower numbers are placed first when offers are prepared for the assistant.

The assistant receives at most **20 enabled manual offers**, ordered by Priority. A saved offer outside that group may not be supplied to a conversation. Put the most important offers first.

To remove a card permanently: clear its Offer name, then save. All fields in that unnamed card are discarded. To keep the information but hide the offer, untick Enabled instead.

Example only - a service offer: Offer name: "Store Setup Session"; Offer type: Service; headline: "Get your store configured with guided help"; URL: your own live booking page; Best for: "New store owners who want help configuring the supported features." Replace every detail with your actual service, scope and price.

Default Sales Guidance

Field	How to use it
Default CTA label	The suggested action wording. Default: **View details**. Use a short label appropriate to the destination.

Field	How to use it
Fallback message	Guidance when no offer can confidently be selected. Default: "I can help you choose the right option. Tell me what you need and I will point you to the best fit."
Sales positioning notes	Buyer types, approved benefits, scope and pricing explanations that help Sophie describe the offers correctly.
Excluded terms / promises	Claims or phrases the assistant must avoid. **This field also filters WooCommerce product names, slugs and SKUs.** Use commas to separate distinct filter terms. Be specific: a broad word can hide a genuine product from public recommendations.

Keep individual instructions concise. Public offer and rules text is shortened in the AI context when a single saved field exceeds about 2,000 characters. Place critical facts first; use published documentation for longer explanations.

Test this page

Start a new public Sophie conversation and ask **"What do you sell?"**, then ask about one exact product or manual offer. Check that its name, price and link match your live website. Ask who it suits and what it does not include. For a store with many products, ask for an older product by its exact public name after refreshing the Knowledge Index. If it is missing, check product visibility, stock status, ID/category restrictions and excluded terms before changing its description.

08 Sales Rules

Open: WordPress admin > **AI Console > Sales Rules**.

Sales Rules describes how Sophie should guide a buying conversation: what to ask, how to recommend, when to mention price and when to refer the visitor to your team. These settings guide AI replies. They do not create coupons, change product prices, place orders, submit enquiries to a CRM or start a live-agent session.

Practical first setup

1. Choose a **Quick setup preset** and **Manual rule preset** that fit your business.
2. Review each detailed dropdown. Selecting a preset does not automatically rewrite those other selections.
3. Set your goal, offer preferences, claim boundaries and contact timing.
4. Choose the allowed contexts and offer types; add Extra manual rules only for requirements the menus do not cover.
5. Tick **Enable sales rules**, click **Save Sales Rules**, and confirm **Sales rules saved.** appears. The status pill displays Enabled or Disabled from the saved value.
6. Test a buying question, a price objection and a question requiring human help.

Status and fast setup

Field	Default and all choices
Enable sales rules	**Off** by default. The checked value asks the assistant to use this page's guidance. It is not the frontend on/off switch.
Quick setup preset	Default **All-purpose balanced setup**. Also: **WooCommerce / online store selling setup**; **App / plugin / software selling setup**; **Service business enquiry setup**; **High-ticket sales / demo request setup**; **Support-first with light sales setup**; **Information / documentation site setup**.
Manual rule preset	Default **Safe default rules**. Also: **No hard selling**; **Explain value before asking for action**; **Push demo or walkthrough for serious buyers**; **Push contact form for complex enquiries**; **Online store safe selling rules**; **App / software safe selling rules**; **Technical expert sales rules**.

The preset names are saved as guidance alongside the detailed options. Review the full page after choosing one. Keep the selections consistent rather than combining contradictory instructions.

Core Selling Behaviour

Field	What it controls	Default and available options
Sales style	The way the assistant approaches a buying conversation.	Default **Consultative - ask questions first, then recommend**. Alternatives: **Direct - clear answer and clear next step**; **Friendly - soft, helpful, low pressure**; **Expert - technical and confidence-building**; **Problem solver - focus on pain points and solutions**.
Primary goal	The main outcome to guide the visitor towards.	Default **Solve the visitor problem first**. Alternatives: **Guide toward product purchase**; **Capture a lead or enquiry**; **Push toward demo or walkthrough request**; **Answer questions before support is needed**.
Recommendation behaviour	How options should be presented.	Default **Ask questions before recommending**. Alternatives: **Recommend one best option**; **Show top three options**; **Compare suitable options**; **Explain first, then suggest**.

Offer And Discount Rules

Field	What it controls	Default and available options
Offer priority	Which suitable offer to emphasise first.	Default **Best fit first**. Alternatives: **Best value first**; **Most popular first**; **Premium option first**; **Lowest price first**; **Newest offer first**. This does not create evidence for popularity or value; provide accurate supporting facts.
Discount policy	How to discuss discounts.	Default **Never promise discounts or coupon codes**. Alternatives: **Only mention visible discounts**; **Suggest contacting the business for discounts**; **Avoid discount discussion**. No choice creates a discount.
Urgency level	Strength of time/action prompts.	Default **Soft urgency**. Alternatives: **No urgency**; **Medium urgency**; **Strong urgency**. Published facts still govern deadlines and availability.

Trust Claims And Safety Rules

Field	What it controls	Default and available options
Fact and claim rule	How answers handle feature and outcome claims.	Default **Use only known facts from site/products/sources**. Alternatives: **Strict - no unsupported claims at all**; **Compare only when comparison data is known**; **Explain benefits without promising results**; **Ask a follow-up question when unsure**.
Guarantee / warranty rule	How to discuss guarantees, warranties and refunds.	Default **Only mention guarantees/warranties published on the site**. Alternatives: **Never promise guarantees, refunds, or warranties**; **Refer visitor to policy page only**; **Suggest contacting the business for policy questions**.

Where Sales Rules Apply

These are multi-select lists. Hold **Ctrl** on Windows or **Command** on Mac to select or deselect separate items. Keep **All** by itself when you want all entries, and **No blocked offer types** by itself when there are no exclusions.

Field	Default and all choices
Page / context coverage	Default **All pages / contexts**. Also: **Home page**, **Product pages**, **Category pages**, **Cart and checkout**, **Pricing pages**, **Documentation / guides**, **Support pages**, **Admin console**. These are conversation guidance categories, not the widget display rules.
Allowed offer types	Default **All offer types**. Also: **Products**, **Apps / plugins**, **Services**, **Subscriptions**, **One-time plans**, **Bundles**, **Upgrades**, **Add-ons**, **Demos**, **Free trials**, **Contact sales**. Only select offers you actually provide.
Blocked offer types	Default **No blocked offer types**. The other choices are **Products**, **Apps / plugins**, **Services**, **Subscriptions**, **One-time plans**, **Bundles**, **Upgrades**, **Add-ons**, **Demos**, **Free trials**, **Contact sales**. Avoid allowing and blocking the same type.

Lead Checkout And Objection Handling

Field	What it controls	Default and available options
Lead capture timing	When to ask for an enquiry or contact details in conversation.	Default **Ask after giving value**. Alternatives: **Never ask for lead details**; **Ask early**; **Ask before quote or detailed recommendation**; **Ask when visitor seems ready to leave**. The last choice describes conversational intent, not a browser exit-detection feature.

Field	What it controls	Default and available options
Checkout push level	Strength of the next buying action.	Default **Clear buying prompt**. Alternatives: **Do not push checkout**; **Soft next step**; **Strong checkout prompt**.
Objection handling	How to answer hesitation over cost, complexity or suitability.	Default **Answer objection, then reframe value**. Alternatives: **Ask a follow-up question first**; **Compare alternatives**; **Explain value or return on investment**; **Escalate to human support or sales**.
Escalation rule	When to stop trying to close and suggest business/support contact.	Default **Escalate when complex or uncertain**. Alternatives: **Never escalate automatically**; **Escalate on price objection**; **Escalate on technical question**; **Escalate on custom request**.
Human handoff rule	When to offer a human contact path.	Default **Offer handoff for complex, uncertain, or custom requests**. Alternatives: **Never offer human handoff automatically**; **Always offer a human contact option**; **Offer handoff after two failed attempts**; **Offer handoff for pricing or technical questions**. Configure the real support/contact destination in Support Rules.
Closing message style	How to end a sales answer.	Default **End with one clear next step**. Alternatives: **End with two simple choices**; **End by asking one helpful follow-up question**; **End with checkout, demo, or contact action**; **Soft helpful close only**.

Optional Manual Sales Rules

Extra manual rules is an optional plain-text field, empty by default. Enter concise instructions that fill a real gap. Example only: "Recommend the starter plan for a single store. For custom multi-site licensing, send the visitor to our published contact page. Do not offer an unpublished discount." Replace the example with your actual plans and policy.

Save Sales Rules stores the whole form. The saved rules and enabled flag are passed as AI guidance; this page does not add a separate hard enforcement or workflow engine. Keep non-negotiable product visibility and source restrictions in Products / Offers, and verify representative replies.

Test this page

Ask **"Which option suits my situation?"** and provide a real customer scenario. Then ask **"Can I get a discount?"** and **"Can you guarantee the result?"**. Expect a recommendation grounded in your real offers, no invented coupon and no unsupported guarantee. Ask a complex custom-pricing question and verify the configured contact path is appropriate. A handoff answer should offer the real contact route; do not treat it as proof that a staff member has been notified.

09 Comparison Rules

Open: WordPress admin > **AI Console > Comparison Rules**.

This page defines how Sophie discusses alternative products, services, tools or manual workflows. Supply only comparisons you can support. It does not research competitors automatically or keep their pricing up to date.

Practical first setup

1. Review **Enable comparison rules for the AI assistant**, which is on by default.
2. Choose the comparison mode, scope, recommendation style and pricing tone.
3. Select useful comparison angles and qualifying questions. Add your own in the custom text boxes, one per line.
4. Enter known alternatives and your approved strengths. Add restrictions, proof requirements and the appropriate human contact rule.
5. Set the closing style, click **Save Comparison Rules**, and confirm **Comparison rules saved.** appears.
6. Test a known alternative and an unknown alternative. Check the reply against your sources.

Main Comparison Behaviour

Field	Default and all options
Enable comparison rules for the AI assistant	**On** by default. Sends the comparison guidance and enabled setting to the assistant. This does not turn the public widget on or off.
Comparison mode	Default **Balanced consultant - fair comparison, then recommend best fit**. Alternatives: **Confident sales - highlight why our offer is better**; **Educational - explain differences without heavy selling**; **Support-first - focus on helping the user choose safely**.
Competitor / alternative scope	Default **Direct alternatives only**. Alternatives: **Tools in the same category**; **Only competitors/options listed below**; **All common alternatives**. Choose the listed-only option when you want to tightly limit named comparisons.
Recommendation style	Default **Match the user problem to the best solution**. Alternatives: **Compare feature-by-feature**; **Lead with value and time saved**; **Lead with safety, control, and fewer mistakes**.
Pricing tone	Default **Value first - explain what they get before price**. Alternatives: **Budget sensitive - respect cheaper alternatives**; **Premium positioning - justify better capability**; **Neutral - mention price only if asked**.

Allowed Comparison Angles

Under **The assistant may compare using these preset angles**, the default selections are **Feature comparison**, **Use-case comparison**, **Ease of use**, **Support and documentation**, and **Pricing/value**.

Additional options are **Setup time**, **Integrations**, **Limitations and trade-offs**, and **Best-fit recommendation**.

Custom comparison angles accepts one additional angle per line and starts empty. Example only: "Compare whether the documented setup suits one store or several stores." **Select all** ticks every preset in that group; **Clear** unticks every preset in that group. Neither button clears the custom text or saves the form.

Questions To Ask Before Comparing

Under **Useful preset qualifying questions**, the defaults are **What problem are you trying to solve?**, **What type of site/store are you running?**, and **Do you have a budget range?**. Additional choices are **How technical are you or your team?**, **Are you using another tool now?**, **What features are must-haves?**, and **How soon do you need this working?**

Custom qualifying questions accepts one question per line and starts empty. Use it for genuine fit questions specific to your business. The group's **Select all** and **Clear** buttons affect only its preset checkboxes.

Competitors Alternatives Or Compared Options

Field	What to enter
Known competitors / alternatives	Plain-text names and factual comparison notes. Keep entries clear and distinct, preferably one alternative per line. Alternatives can include a manual workflow. Check prices and capabilities yourself before entering them.
Approved strengths to use in comparisons	Verified strengths of your own offer, ideally one statement per line. Explain what a feature does without turning it into an unsupported superiority claim.

Both fields start empty. The placeholder examples describe possible content, not facts about your business or a competitor.

Safety Rules

Blocked preset comparison behaviour has five choices. The first three are selected by default:

- **Do not invent competitor features, prices, reviews, or limits** - default on.
- **Do not guarantee sales, rankings, revenue, or conversion results** - default on.
- **Do not insult or unfairly attack competitors** - default on.
- **Do not say "best", "only", or "#1" unless verified** - default off.
- **Do not give legal, tax, or financial claims** - default off.

Select all and **Clear** affect this checkbox group only. **Custom blocked comparison behaviour** is a separate plain-text field, one restriction per line; it starts empty.

Field	Default and all options
Proof requirement	Default **Only use verified features, docs, and known facts**. Alternatives: **Use knowledge sources first, then approved rules**; **Ask the visitor when the answer is unknown**.
Human handoff rule	Default **Offer human help for complex comparison questions**. Alternatives: **Offer human help for pricing/licensing questions**; **Offer human help for technical setup questions**; **Do not push human handoff unless requested**. This guides a contact suggestion; it is not a live transfer.
Forbidden claims / words / promises	Empty by default. Enter additional words or assertions the assistant must avoid, such as an unsupported revenue guarantee. Keep each rule clear and consistent with your other Rules pages.

Closing Rules

Field	Default and use
Closing style after comparison	Default **Soft recommendation - suggest the best next step**. Alternatives: **Demo first - invite them to view or try a demo**; **Buy now - direct purchase CTA when suitable**; **Ask one follow-up question before closing**.
Preferred comparison close / CTA text	Optional plain-text instruction for the next step after comparing. Mention only real demos, published guides, product pages or contact routes. Starts empty.
Extra comparison notes	Optional additional business-specific comparison guidance. Starts empty.

Click **Save Comparison Rules** after editing. These settings guide the response rather than creating an automatic competitive research process. Keep your saved information current and test the result.

Test this page

Ask **"How is your offer different from [a listed alternative]?"**. Check that the assistant explains only approved differences and links to the appropriate next step. Then ask about an unlisted alternative with an invented feature or price. Expect the assistant to acknowledge missing evidence or ask a useful question, rather than accepting the invented fact. Use **Logs / Training** to review the actual replies and refine the relevant saved guidance.

10 Support Rules

Open **WordPress admin > AI Console > Support Rules**. This page tells Sophie when to help, when to send a visitor to a person, and which promises she must avoid. These are answer instructions; selecting a contact path does not create a support inbox or ticketing service.

Set up support

1. Tick **Enable support rules**.
2. Choose the support mode, topic coverage and handoff rule that match your business.
3. Set the refund, billing, compatibility and troubleshooting policies using your actual published terms.
4. Choose **Support contact path**, then enter the matching **Support email** or **Support page URL**. A ticket form uses the URL field.
5. Add any exact business rules, prohibited promises and the handoff message.
6. Click **Save Support Rules**. The confirmation is **Support rules saved.** Saved support rules are read for subsequent answers; changing these rules does not require a knowledge-index refresh.
7. Test a setup question, a refund request and a request for guaranteed compatibility. Sophie should use the configured public facts and contact route without promising an unapproved outcome.

Every field

Defaults below describe a new configuration. Previously saved values can differ.

Field	Choices, default and use
Enable support rules	On by default. Supplies your support rules when the assistant answers customer questions.
Support mode	**Only answer support questions when the visitor asks**; **Balanced: sell first, help when support is needed** (default); **Proactive: offer setup help during the sales conversation**; **Human-first: send complex cases to support quickly**; **Custom / add your own rule below**.
Support topic coverage	**Basic questions only**; **Setup, installation, and configuration**; **Billing, refunds, subscriptions, and account questions**; **Technical troubleshooting and compatibility**; **All common support topics** (default); **Custom / add your own topics below**.
Human handoff rule	**Escalate complex setup issues**; **Escalate billing and refund issues**; **Escalate unhappy or angry customers**; **Escalate all sensitive cases** (default); **Custom / add your own handoff rule below**. Handoff means directing the visitor to your configured contact route.
Refund policy handling	**Use only the store refund policy** (default); **Do not promise refunds**; **Mention trial or money-back terms only if configured**; **Custom / add your own refund policy below**. Selecting an option does not create a refund entitlement or issue a refund.

Field	Choices, default and use
Billing support handling	**Send billing questions to the customer account page** (default); **Send billing questions to the marketplace or checkout provider**; **Ask the customer to contact support**; **Custom / add your own billing rule below**. Put the correct destination in your supporting instructions or public knowledge.
Compatibility handling	**Only answer for WordPress and WooCommerce compatibility**; **Answer only for the configured site mode**; **Never guarantee compatibility without testing** (default); **Custom / add your own compatibility rule below**.
Troubleshooting flow	**Start with basic troubleshooting steps** (default); **Ask for exact error messages and screenshots**; **Use all common troubleshooting steps**; **Custom / add your own troubleshooting flow below**.
Support contact path	**Send users to the support page** (default); **Send users to support email**; **Send users to a support ticket form**; **Custom / add your own support contact path below**.
Support tone	**Friendly and clear**; **Direct, no guessing, no fake certainty** (default); **Calm and escalation-focused**; **Custom / add your own tone rule below**.
Support email	Optional email address, for example **support@example.com**. Initially blank. Use when the contact path is email.
Support page URL	Optional full URL, for example **https://example.com/support/**. Initially blank. Use for a support page or ticket form; verify the destination opens.
Custom support topics	Initially blank. List additional allowed topics, one per line. Use this when selecting custom coverage.
Custom support instructions	Initially blank. Write exact policies or steps, including any custom mode, handoff, billing, refund or compatibility choices. Selecting **Custom** alone supplies no policy wording.
Blocked promises	Initially blank. List statements Sophie must not promise, such as guaranteed compatibility, guaranteed results or refunds outside your published terms.
Custom escalation message	Optional, initially blank. Supply the wording Sophie should use when directing someone to support. Include the next action and the genuine contact route.

Example custom escalation message: "This needs our support team to check your setup. Please use [your actual support URL] and include the product name, WordPress version and exact error message." Replace the bracketed text before saving.

If a save reports **Security check failed. Please reload the page and try again.**, reload the admin page, re-enter the intended changes and save again. A permission error means the current WordPress account does not have permission to manage these settings.

11 Widget Designer

Open **WordPress admin > AI Console > Widget Designer**. This controls Sophie's public appearance, the pages on which she appears and the ready-made questions visitors can choose.

Publishing control: saving this page with **Enable widget** checked also turns on the front-end assistant setting. Keep it unchecked while preparing the public experience. When you are ready, confirm your API connection, offers, knowledge and support rules, then enable Sophie and test a public page.

Set up and publish Sophie

1. Choose a corner under **Widget position**; **Bottom right** is the default.
2. Select the primary and accent colours. Set the button label, header title, welcome message and input placeholder.
3. Choose **Page targeting**. For a controlled launch, select **Only show on selected pages** and enter the actual page URLs, paths or slugs, one per line.
4. Choose when the launcher appears under **Display delay**.
5. Select relevant quick actions and add any custom questions, one per line.
6. Tick **Enable widget** when ready and click **Save Widget Designer**. The confirmation is **Widget Designer settings saved.**
7. Open an allowed public page in an incognito window. Confirm placement and text, wait for the configured trigger, open Sophie and send a real question. Test a second page that should be excluded.

Every field and action

Field or action	Choices, default and use
Enable widget	Checked by default on this form. Shows Sophie when the public activation and display conditions allow it. Saving writes both the widget switch and front-end activation switch. Unticking and saving hides the widget.
Widget position	**Bottom right** (default), **Bottom left**, **Top right**, **Top left**, **Inline shortcode only**, **Hidden**. Use one of the four corner positions for the working floating widget. **Hidden** suppresses it. See the shortcode note below.
Primary colour	Colour picker, default **#2563eb**. Supplies the widget's primary colour.
Accent colour	Colour picker, default **#111827**. Supplies the accent colour.
Button label	Default **Talk to Sophie**. The launcher call to action. Use short, readable text.
Widget header title	Default **Talk with Sophie**. Appears at the top of the open chat.
Welcome message	Default: "Hi, I'm Sophie. I can help you choose the right app, compare options, check pricing, or fix setup questions. What are you trying to do today?" Change this to match what your business actually offers. Appears in the greeting and chat introduction.

Field or action	Choices, default and use
Input placeholder	Default **Ask Sophie...** on the form. Hint inside the visitor's message box.
Page targeting	**Show on all pages** (default); **Only show on selected pages**; **Show everywhere except excluded pages**; **Only show where shortcode is added**. The selected mode determines which list is used.
Selected pages	Initially blank. One full page URL, slug or path per line. Used only with **Only show on selected pages**. An empty selected list leaves no matching page on which to display the widget.
Excluded pages	Initially blank. One page URL, slug or path per line. Used with **Show everywhere except excluded pages**.
Display delay	**Show immediately** (default), **After 3 seconds**, **After 10 seconds**, **After visitor scrolls**, **After visitor is idle**. Idle means 5 seconds without mouse movement, keypress, touch or scrolling. Delay controls the launcher's appearance; it does not automatically start a conversation.
Quick Action Buttons	Check the preset questions visitors should see. The default selections are **Choose an app**, **Compare options**, **Need setup help**, **Moving products/site**, and **Ask a question**. All choices are listed below.
Select all presets	Checks every preset on the current form. Click **Save Widget Designer** to persist. It does not override the public limit of 12 quick actions.
Clear presets	Unchecks the preset buttons on the form. It does not delete custom quick actions or chat records. Save to persist.
Custom quick actions	Initially blank. One short question or prompt per line, such as "Which plan fits my store?" These are sent to Sophie as visitor questions when clicked; they are not direct navigation buttons.
Save Widget Designer	Saves the whole form. If **Enable widget** is checked, this also enables the public assistant.

All quick-action presets: **Choose an app; Compare options; Check pricing; Need setup help; Moving products/site; Ask a question; Show key features; Book a demo; Contact support; WooCommerce help; Google Sheets help; Troubleshooting; Refund policy.** Only offer prompts relevant to your actual service. A **Book a demo** button asks Sophie about a demo; it does not create a booking system.

The public widget shows a maximum of **12 distinct quick actions**, taking selected presets first and custom lines afterward. Selecting all 13 presets therefore prevents later items, including custom actions, from appearing. Choose a smaller useful set.

Page matching: targeting uses the URL path and also the final slug. Query strings and fragments are ignored. For example, **/support/** also matches another path ending in **/support/**. Do not use these lists for access control or expect wildcard patterns; verify both included and excluded pages.

Shortcode options in version 0.1.6: the two shortcode-only choices suppress the floating widget, and no working widget shortcode is registered. Use a corner position with ordinary page targeting for public deployment.

On mobile, test the real widget layout on a small screen.

Visitor controls

Visitors click Sophie's launcher or the chat button to open the panel. The launcher **×** minimises the character and shows a restore button. **Chat with Sophie** restores it. The panel's close button closes the conversation view. Visitors type a message and click **Send**, or choose a quick action. Closing the panel is not a command to erase server logs.

If Sophie is missing, check **Enable front-end assistant** in **Assistant Mode**, **Enable widget** here, the selected corner, page targeting and the display-delay trigger. After saving, reload the public page and clear the site's page cache if an old layout is still served. An admin screen is not a valid public-widget test.

If the panel opens but replies **Service unavailable. Please try again in a little while.**, check the API setup in Assistant Mode and the relevant error logs; the public message intentionally does not expose private connection details. Successful display alone does not prove the API connection works.

12 Logs and Training

Open **WordPress admin > AI Console > Logs / Training**. This page combines activity summaries, recent assistant events, admin-reviewed learning suggestions, knowledge-index refresh and logging preferences.

Use it to see what visitors click and where answers need improvement. **Buy / pricing clicks are clicks, not confirmed orders or revenue.** The summary on this page is calculated from the latest **50 recorded events**, not a lifetime total.

Review activity and approved learning

Section or action	What it means and how to use it
Assistant Conversion Tracking	Summary columns are **Recent events**, **All clicks**, **Buy / pricing clicks**, **Guide clicks**, and **Errors / no answers**. Counts depend on the logging switches below.
Approved Sales Learning Rules	Shows **Pattern**, **Approved rule Sophie can use**, **Evidence** and **Approved** date. These are saved guidance for future front-end answers, not a retrained AI model.
Sales Learning Suggestions	Shows a repeated **Pattern**, its **Evidence**, a **Suggested admin-reviewed improvement** and **Action** buttons. Suggestions are drawn from up to 500 recent tracked events. Insufficient history produces **No learning suggestions yet**.
Approve	Makes that suggestion available as approved guidance in Sophie's future front-end answers. Read the evidence and suggested wording before approving. Success: **Sales learning suggestion approved. Sophie can now use it in future frontend answers.**
Ignore	Hides that suggestion from the suggestion list. The page displays the number of ignored suggestions. Success: **Sales learning suggestion ignored.** This does not delete the underlying events.
Recent Assistant Events	Shows **Date**, **Assistant**, **Event**, **Question / message**, **AI reply**, **Clicked URL** and **Page**. Scroll the table sideways to reach every column. URLs are clickable. The table contains the latest 50 events; text may be omitted or shortened by privacy settings.
Knowledge index status	**Not built**, **Needs refresh** or **Current**. A current index means a rebuild completed; it does not establish that every possible source supplied content.
Last refreshed	The most recent rebuild time, or **Never**.
Refresh Knowledge Index	Rebuilds public knowledge. Use when indexed source content needs updating. The page also recommends a refresh after changing rules or guidance, but saved Support Rules are read directly for subsequent answers and do not depend on a rebuild. Success reports the number of indexed public items. This is separate from saving logging settings.

A repeated question or destination generally needs at least two relevant recorded events before a suggestion can appear. Anonymous or strict privacy removes question text, so question-based

patterns are unavailable in that stored history; repeated sanitized link destinations or error patterns can still be recorded.

There is no on-screen edit, revoke or restore button beside approved or ignored learning rules in version 0.1.6. Approve only guidance you intend Sophie to use.

Logging Status

Field	Default and effect
Enable logging	**On**. Master switch for recording new assistant events. Turning it off does not erase existing events.
Conversation logging	**Off**. When on, permits message and reply events to be recorded. Privacy mode still controls whether their text is retained.
Lead logging	**On**. Controls tracked opens, closes and clicked links/buttons. This is activity tracking; it is not proof that a lead form or sale was completed.
Error logging	**On**. Permits errors and no-answer events.
Customer feedback	**On**. Saved preference to allow useful/not-useful feedback where a supported workflow supplies it. This checkbox does not add feedback buttons to the current public widget.

Privacy And Retention

Field	Choices, default and effect
Privacy mode	**Standard logging** retains up to 500 characters of a question and 700 of an answer summary. **Limited customer data** retains up to 180 and 240 characters respectively. **Strict privacy mode** removes question and answer text, while retaining event URLs and session identification. **Anonymous logs only** (default) also removes page URL and session ID; clicked destinations retain their safe scheme/host/path, without credentials, query strings or fragments. These settings affect newly written events.
Retention days	Default **30**, range **1-365 days**. Entries older than the configured period are removed when a subsequent event is successfully written. Changing the number is not an immediate purge.
Maximum log entries	Default **1000**, range **100-10000 entries**. When logging writes exceed the cap, older entries are removed and newer entries kept.

Logs are event summaries rather than a guaranteed complete transcript. A lower retention period or entry cap can permanently remove historical evidence and reduce the history available for learning suggestions. Turning off logging, changing privacy mode or clicking a "Clear" selection button does not remove old records already stored.

Log Types

Available checkboxes: **Sales conversations; Support conversations; Product or offer questions; Pricing questions; Comparison questions; Abandoned chats; Support escalations; Failed or**

low-confidence answers; Lead capture events; Customer feedback; Conversion events; AI errors. Initially none are selected.

Use **Select all log types** or **Clear log types** to change the checkbox selection, then save. These categories are saved review guidance. The actual event recorder's capture switches are **Enable logging**, **Conversation logging**, **Lead logging** and **Error logging**. Selecting **Conversion events** does not add an order attribution integration.

Training Controls

Field	Choices, default and use
Enable training review	**On** by default. Saved preference to review logged activity for improvements.
Auto improvement	**Off** by default. The page recommends leaving this off for launch and keeping review with an admin. Enabling it does not start model fine-tuning or bypass the explicit **Approve** action for sales learning suggestions.
Training mode	**Manual review only** (default); **Only train from admin-approved examples**; **Training disabled**. Saved review guidance. These options do not remove already-approved learning rules.
Review priority	**Failed answers first** (default); **Low-confidence answers first**; **Escalated conversations first**; **Lead quality issues first**; **Review all logged activity**. Describes your review focus; the Recent Assistant Events table remains newest first.
Low-confidence action	**Flag for review** (default); **Hand off to support**; **Ask a clarifying question**; **Do not answer**. Guidance for handling uncertain answers, not an automatic ticketing integration.
Export format	**CSV export** (default); **JSON export**; **No export**. Version 0.1.6 saves the preference but provides no export/download button on the page.

Training Signals

Available checkboxes: **Good answers; Bad answers; Missed sales opportunities; Customer objections; Competitor mentions; Pricing objections; Refund questions; Product fit questions; Setup questions; Knowledge gaps; Repeated questions; Escalated conversations.** Initially none are selected. These describe what admins should look for in their review. **Select all signals** checks them all; **Clear signals** unchecks them. Save to keep the selection.

Training Rules And Notes

All five fields begin blank and accept plain multiline text.

Field	What to enter
Training rules	Exact instructions about which examples may be used as future guidance and which must not be used.
Blocked training topics	Topics that must not become improvement guidance.

Field	What to enter
Review workflow	Your internal review process, such as checking the product page and policy before approving a correction.
Custom training examples	Approved question-and-answer examples, one example per paragraph. These are guidance text, not a fine-tuning upload.
Admin notes	Operational notes for administrators. Keep keys, passwords and confidential customer details out of guidance text; saved settings are used in assistant context.

Click **Save Logs / Training** after changing any settings. The success notice says **Logs / Training settings saved. Knowledge index now needs refresh.** Then click **Refresh Knowledge Index** if you want the refreshed index ready for the next test.

Validate logging and handle problems

1. Leave **Enable logging**, **Lead logging** and **Error logging** on. Choose your required privacy and retention settings and save.
2. On an allowed public page in incognito, open Sophie, ask a relevant product question and click one of the genuine links she returns.
3. Reload **Logs / Training**. Look for the corresponding Sophie open/click events and verify the destination. With anonymous logging, blank message, reply and page cells are expected.
4. If you need to inspect wording during a controlled test, enable **Conversation logging** and select **Limited customer data** or **Standard logging**, then save and make a fresh test request. Earlier omitted text cannot be recovered by changing the setting later.
5. Fix missing or incorrect facts in the relevant offers, knowledge or rules page. Refresh the index if indexed source content changed, then test the same question again.

Clear log types and **Clear signals** clear selections only. This page contains no **Clear logs** action and no log export download. Do not treat Dex's separate **Clear chat** control as a way to delete these event records.

If refreshing reports **Knowledge indexer is not loaded.**, the indexing component was not available; retain the error and check the plugin installation. If a learning action reports missing suggestion data or an unavailable learning class, reload the page and check that the current suggestion still exists before trying it again. Permission or expired-security-token errors require an authorised admin session and a freshly loaded page.

13 Dex data connections and website intelligence

Open: WordPress > **AI Console > Dex**.

Set up the OpenAI API connection and activate Dex first. Then add the services below as you need them. Google, Bing and SerpApi are optional data sources; they are not prerequisites for asking Dex to explain the current WordPress screen or guide the rest of your SiteSellerAI setup.

This page contains four panels: **Dex data status**, **Google: Analytics, Search Console, and PageSpeed**, **Bing: Webmaster, crawl, index, backlinks, and AI Performance signals**, and **SerpApi: SERP checks and AI visibility prompts**. They are sections of one page, not separate tabs. Each provider has its own Save button. Save a provider before moving to another section.

Dex data status

The summary shows whether the saved settings are present. A status is not a successful live report test.

Status	What it means	What to do next
Google - Connected	An access or refresh token is stored.	Ask Dex for a Google report to confirm current account access and readable data.
Google - Not connected	No Google access or refresh token is stored.	Complete Google setup and click Connect Google.
Bing - Configured	A Bing API key and site URL are saved.	Ask for Bing search performance or crawl information.
Bing - Not configured	The key or site URL is missing.	Complete the Bing form and save.
SerpApi - Configured	A SerpApi API key is saved.	Add tracked queries and request a SERP check.
SerpApi - Not configured	No SerpApi API key is saved.	Enter a key only if you want this optional service.

Provider keys and OAuth tokens stay on the WordPress server. Dex receives report summaries. Enter credentials in the named settings fields, not in Dex chat. An empty password field after saving is normal: look for **Saved** beside the credential status.

Google Analytics Search Console and PageSpeed

Use this connection for your own website's Google traffic and search performance. Dex can read GA4 page activity, Search Console page/query evidence, and homepage PageSpeed summaries. It does not create Analytics tracking or verify a Search Console property for you.

Before you begin

Have a Google account with access to the correct GA4 and Search Console properties, and a Google Cloud project you can configure. Use the same Google account when authorising access. Collect the numeric GA4 property ID and the exact Search Console property name. The PageSpeed key is optional, but recommended for automated checks.

Create the Google connection

1. Open **AI Console > Dex**. Copy the entire **Google redirect URI** shown above the Google form. It normally ends in **/wp-admin/admin-post.php?action=aisc_google_oauth_callback**; copy the displayed value so your domain and installation path are exact.
2. In Google Cloud Console, select or create the project for this connection. Enable **Google Analytics Data API**, **Google Search Console API**, and **PageSpeed Insights API** in that project.
3. Configure **Google Auth platform** with the application name and contact details. Choose the audience appropriate to your account. If an External app is in Testing, add the Google account you will connect under **Audience > Test users**.
4. Open **Google Auth platform > Clients > Create client**. Choose **Web application**. Under **Authorized redirect URIs**, add the exact URI copied from Dex, then create the client.
5. Copy the Client ID and Client Secret into the matching Dex fields. Complete your property fields below. Leave **Use Google context in Dex** checked and click **Save Google settings**.
6. Click **Connect Google**. Select the account with access to your properties and grant the requested read-only Analytics and Search Console permissions. Complete the flow and return to WordPress.
7. Confirm **Connection status: Connected**, then ask Dex: **"Show my Google traffic and search performance for the last 7 complete days. State which sources returned data."**

For Google's current setup screens, see OAuth client credentials and consent and test users.

Every Google field

Field	What to enter / what it does
Google Client ID	The OAuth web application's Client ID. Starts blank on a new install. Keep the full value.
Google Client Secret	The matching OAuth client secret. Once **Saved** appears, leave this blank to keep it; enter a new value only to replace it.
GA4 Property ID	Digits only, for example **123456789**. This is the property ID, not the **G-...** measurement/tag ID. In Analytics, select the correct property and open Admin > Property settings/details.
Search Console property	The exact property identifier. Use **https://example.com/** for the matching URL-prefix property, or **sc-domain:example.com** for a Domain property. Match HTTP/HTTPS and www exactly where applicable.
PageSpeed API key	Optional Google Cloud API key for PageSpeed Insights. Enable that API in its project. A saved key is preserved when this field is blank. Use restrictions appropriate to requests from your web server.
Use Google context in Dex	Checked by default. Allows the Google context reader to supply relevant Analytics, Search Console and PageSpeed evidence. Uncheck and save to stop this provider context being included; this does not disconnect the account.

The Google panel also displays **Connection status**, **Client secret: Saved / Not saved**, and **PageSpeed API key: Saved / Not saved**. These indicators report stored configuration, not whether Google has accepted the next request.

Google buttons

Button	Result
Save Google settings	Saves this Google form. Does not perform OAuth authorisation.
Connect Google	Starts account authorisation using the saved client credentials. Save first.
Disconnect Google	Removes stored OAuth tokens and attempts to revoke access with Google. Keeps the Client ID, Client Secret, property fields and PageSpeed key. Confirm the status changes to **Not connected**.
Clear Google report cache	Requests removal of saved Google report context. In this build, some date-specific reports can remain until their normal expiry; check the report timestamp instead of assuming the next answer is fresh.

Ask for useful reports

Traffic and search: "Compare the last 7 complete days with the previous 7 days. Show Google Analytics and Search Console separately."

SEO priorities: "Which pages have the clearest SEO opportunities in my Search Console evidence? Show the supporting queries and dates."

Speed: "Check my homepage on mobile and desktop using PageSpeed. Explain the returned findings and the next settings I should inspect."

Dex's Google reports distinguish the reporting period and the previous comparable period. Weekly reports use seven complete days, excluding today; broad reports otherwise default to 28 complete days. State a period such as "last 30 days" when you need another interval. Reports use the WordPress reporting timezone shown in Dex's evidence.

PageSpeed runs are requested for relevant speed questions; they are not fetched with every message. The automatic PageSpeed reader checks the **homepage**, on mobile and desktop. Missing measurements are unavailable, not zero. Lighthouse lab results and any returned real-user field evidence are different measurements and should be read separately.

Google troubleshooting

Symptom	Exact check
Connect failed or redirect mismatch	Recopy the displayed redirect URI into the same OAuth client's Authorized redirect URIs. Check the full scheme, domain, path and query. Save the correct Client ID and Secret before reconnecting.
OAuth failed	Restart Connect Google and complete the authorisation flow promptly. Confirm the permitted account/test-user list and requested scopes.
Connected, but GA4 unavailable	Confirm the numeric property ID, account access, and Analytics Data API in the client's Cloud project. Check that the property itself has recorded data.
Search Console unavailable	Confirm the exact property identifier and connected account's access. A Domain property uses **sc-domain:...**, not a normal URL.

Symptom	Exact check
PageSpeed error	Read the returned provider message; check the API is enabled and the saved key/restrictions if one is used. Do not treat an API error as a poor performance score.
Report still shows an old timestamp	The current build can retain date-specific Google context after the cache button is used. Those reports normally expire after one to six hours. Recheck the timestamp after expiry.

Bing Webmaster crawl index backlinks and AI Performance signals

This is the exact panel heading. The automatic connector supplies verified-site information, Bing queries and pages, rank/traffic rows, crawl statistics/issues and selected keyword statistics. The heading does not mean that every backlink or AI citation report is automatically available.

Connect Bing

1. Sign in to Bing Webmaster Tools. Add and verify the website if needed.
2. Open **Settings > API Access > API Key**. Generate or copy your key.
3. In **AI Console > Dex**, enter the key under **Bing Webmaster API key** and copy the exact verified site URL into **Verified Bing site URL**.
4. Set the country and language for your market. Add seed keywords, one per line, if you want keyword checks.
5. Leave **Use Bing context in Dex** checked. Click **Save Bing settings**.
6. Ask Dex: **"Read my Bing search and crawl data. Tell me which reports returned rows and which are unavailable."**

Every Bing field and action

Field / button	What it does
Bing Webmaster API key	Private API key from Bing Webmaster Tools. The Saved indicator means a value is stored. Leave blank to keep an existing key.
Verified Bing site URL	Exact verified address, for example **https://example.com/**. Include the scheme and match the verified property.
Keyword country	Two-letter code. Default **us**; examples **au**, **gb**, **ca**. Choose the market being researched.
Keyword language	Language/region code. Default **en-US**; an Australian example is **en-AU**.
Tracked keywords / AI prompts	One phrase per line. The reader uses up to 20 unique non-empty saved phrases, and a keyword report checks the first eight. Put the most useful phrases first.
Use Bing context in Dex	Checked by default. Allows relevant Bing evidence to be included. Uncheck and save to disable this context while retaining settings.
Save Bing settings	Saves this panel and clears its report cache.

Field / button	What it does
Clear Bing report cache	Removes cached Bing reports so the next relevant request can fetch again. It does not erase data held by Bing.

The **Connection status** is Configured when both key and site URL are saved; it does not validate them. The **Bing API key** indicator separately shows whether a key is saved.

Bing reports are cached for up to six hours. Keyword statistics are fetched when the question calls for keyword research, volume, tracked keywords or AI visibility prompts. Use: **"Show Bing keyword research for my saved tracked keywords, using the country and language in my settings."**

If a Bing report fails, check that the key's account has access to the exact verified site, then use the provider error to identify the problem. No returned rows do not prove zero traffic. A phrase saved under "AI prompts" is used as a keyword seed here; it is not proof that ChatGPT, Gemini, Copilot or Perplexity mentioned your business. Dex needs actual readable evidence for such claims.

SerpApi SERP checks and AI visibility prompts

Use SerpApi for sampled Google result checks, whether the target domain appears in returned results, AI Overview evidence when supplied, and limited Google AI Mode citation checks. This service uses its own search allowance or credits, separately from OpenAI.

Set up SerpApi

1. Sign in to SerpApi and open your API key page. Copy the private key into **AI Console > Dex > SerpApi API key**.
2. Set your **Target domain**. Enter the domain you want checked, such as **example.com**.
3. Set the search location, country and language to the market you serve.
4. Add your most important buyer searches or questions under **Tracked SERP / AI visibility prompts**, one per line.
5. Leave **Use SerpApi context in Dex** checked. Choose whether to allow **Google AI Mode checks**, then click **Save SerpApi settings**.
6. Ask Dex: **"Check the saved SerpApi queries for my target domain. Show the returned positions, location and report timestamp."**

Every SerpApi field and action

Field / button	What it does
SerpApi API key	Private key from your SerpApi account. Leave blank to retain a saved key. The Saved status does not confirm current credit availability.
Target domain	Domain to look for in results. A bare domain is clearest. If left blank, the reader uses this WordPress site's hostname.
Search location	Optional location text, for example **Sydney, New South Wales, Australia**. Choose a location supported by the provider.
Search country	Two-letter country code. Default **us**; use **au** for Australia.

Field / button	What it does
Search language	Language code. Default **en**. This field differs from Bing's default **en-US**.
Tracked SERP / AI visibility prompts	One query per line. Up to 25 unique non-empty entries are read. Place priority phrases first: a fresh report checks the first three Google queries and, when requested/enabled, the first two AI Mode prompts.
Use SerpApi context in Dex	Checked by default. Enables relevant SERP and AI visibility context. Uncheck and save to stop it being used.
Google AI Mode checks	Checked by default. Permits limited checks when your question asks about AI visibility, AI Mode, AI Overviews, citations or prompts. It does not run all the time.
Save SerpApi settings	Saves this panel and clears its report cache.
Clear SerpApi report cache	Removes stored result summaries. The next relevant request can perform new checks and use provider credits.

The panel shows **Connection status: Configured / Not configured** and **SerpApi API key: Saved / Not saved**. Configured means a key is stored. To test real access, save at least one query and ask Dex to check it.

Ask: **"Run the allowed Google AI Mode checks for my saved prompts. Show actual citations and mark missing evidence."** Results are sampled for the saved queries and market, not a universal ranking or visibility score. A cached result is not a new live check. Reports are cached for up to six hours.

An empty or incomplete result is different from a valid result in which your domain is absent. Do not interpret either as proof of visibility across every AI system. For errors, use the provider message to distinguish an invalid key, insufficient searches, request parameters or service availability; do not assume the cause from missing rows alone.

Site Kit Wincher and the screen Dex can see

Site Kit: Open the relevant Site Kit report inside WordPress, allow its tables to load, then ask Dex about that screen. Dex can use captured visible text. A report hidden in an iframe or not loaded into the current page may be unavailable. Site Kit's own Google connection does not populate SiteSellerAI's separate Google OAuth fields.

Wincher: There is no Wincher API-key field on the Dex page. This build inspects locally stored Wincher plugin/database state. Detecting that Wincher is installed is not the same as reading ranking positions. If rankings only exist in Wincher's external service, Dex's local detector alone cannot supply them.

Screen-based guidance: Open the exact settings page you want help with and ask, **"Explain this screen and tell me what to enter next, one step at a time."** Dex receives visible field labels, non-sensitive selected values, tabs, buttons and notices. Passwords and credential fields are excluded or masked. This capability is guidance from readable screen evidence; it does not automatically submit arbitrary plugin settings forms.

Read the evidence correctly

Term	Meaning
Saved / Configured	The required values are stored locally.
Connected	A Google token exists; the report request still determines what is currently readable.
Returned rows	The provider supplied data for the report. Check dates, market and source.
Cached	Dex is reusing a previous response. Check its timestamp.
No rows / unavailable	The requested evidence was not returned. This is not automatically a zero value or a failed key.
Error	A request failed; use the specific provider message for the next check.

To finish setup, ask: **"Review my Dex data connections. List what is connected, what has readable reports, and the next missing setup step. Do not change any settings."**

14 Sophie launch check

Complete the Dex-first quick setup before this launch check. A saved API key and working Dex response establish the initial assistant connection; Sophie still needs appropriate public knowledge, offers, support rules and display settings.

Check	Expected result
Widget activation	Public assistant enabled, **Enable widget** checked, working corner selected and test URL allowed.
Incognito appearance	Launcher appears at the intended corner and delay; text is correct, legible and does not cover an important page action.
Basic product question	Sophie gives the right product/offer and supported features, with a usable public link.
Price follow-up	A follow-up such as "How much is that one?" stays with the discussed product and uses configured facts.
Support question	Sophie follows your selected support route and avoids unapproved promises.
Unknown fact	Sophie asks a useful clarification or sends the visitor to the configured support route.
Link destination	Product, pricing, guide and support links open the intended page. A click count is not a completed sale.
Targeting	Allowed page shows Sophie; excluded page does not.
Mobile view	Panel, text, input, close and restore controls remain usable on a small screen.
Logs	Fresh events appear according to the logging and privacy settings; omitted text under anonymous mode is expected.

If a fact is wrong, correct its source and repeat that question before broadening the rollout. Dex can help you locate and understand the relevant screen; you still review and save the settings that require admin input.

15 Core setup troubleshooting

What you see	Exact next step
No **Ask Dex** launcher	Log into WordPress as an administrator. Open **AI Console > Assistant Mode**, set **Enable admin assistant > On**, save and refresh the admin page.
API key box is blank after save	Check the **OpenAI API Key: Saved** card. Blank is normal; do not paste the key repeatedly just because it is hidden.
"OpenAI API key is missing"	Paste the key into **Assistant Mode > OpenAI & Conversation Behaviour > OpenAI API key** and save.
"OpenAI rejected the saved API credentials"	Verify the key and its project access, replace it in the same field, save and send a new short message.
"OpenAI rejected the request or selected model configuration"	Check **Model selection**, choose a displayed model your project can use, save and retry a short request.
"OpenAI rate-limited this request"	Wait briefly and retry. If it keeps happening, check the OpenAI project's usage and account limits before repeating requests.
"Dex could not reach OpenAI"	Ask your hosting provider to check outbound HTTPS access to the OpenAI API. Keep the exact displayed error for support.
Request timed out or reached the output limit	Retry once with a narrower task, such as one settings page or one section. If the same problem repeats, investigate the reported cause before continuing.
"Security check failed"	Refresh the WordPress admin page and resend. Log back in if the session expired.
Smart Scan found 0 items	Open **Knowledge Sources**, check the intended public content and source selections, save any corrections and rebuild the index.
Publish Assistant is unavailable	Complete scan > review > **Approve All Safe Suggestions**. This is only needed for Sophie's public launch, not Dex chat.
Sophie appeared before you intended	Open **Assistant Mode**, leave **Do not apply preset** selected, set **Enable front-end assistant > Off**, and save.
Page source changed after analysis	Ask Dex to read the current exact page again, then inspect a fresh proposal before applying it.

When contacting support, provide the exact error, the page or action involved and the time it occurred. Never include your raw API key in a screenshot, chat message or support attachment.