

Roodee AI Chat

User Guide

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Introduction

Roodee AI Chat is a multi-tenant AI customer service platform that lets any business deploy a 24/7 AI agent on their website in minutes. No coding required.

What your AI agent can do:

- Answer customer questions based on your knowledge base
 - Capture leads (name, email, phone)
 - Escalate complex issues to your team via email
 - Support multiple languages (auto-detects visitor language)
 - Suggest follow-up questions to guide conversations
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Getting Started

Step 1: Create Your Account

1. Go to <https://app.roodee.com.au/register>
2. Enter your company name, email, and password
3. Check your inbox for a **verification email** and click the link

4. Sign in at <https://app.roodee.com.au/login>

Step 2: Explore Your Dashboard

After signing in, you'll see:

- **Overview** — Key metrics (agents, conversations, leads, usage)
- **AI Agents** — Manage your AI agents
- **Knowledge** — Upload content for your agents
- **Leads** — View captured customer contacts
- **Billing** — Manage your subscription
- **Settings** — Company info and brand color

Setting Up Your AI Agent

Create an Agent

Your account comes with a default agent. To configure it:

1. Go to **AI Agents** in the sidebar
2. Click on your agent to open the detail page
3. Navigate to **Persona & Behavior**

Configure Persona

Quick Start: Click "**Apply a Template**" to use a pre-built persona:

- AI Customer Service (Roodee example)
- E-commerce Assistant
- Service Business (renovations, trades)
- SaaS Technical Support
- Hospitality (restaurants, hotels)
- Start from Scratch

Key Settings:

Setting	Description
Agent Name	Displayed in the chat header
Welcome Message	First message visitors see
Tone	Professional / Friendly / Casual / Formal
Role Description	Tell the AI who it is and what it does (most important setting)
Instructions	Special rules and constraints
Banned Topics	Topics the AI will refuse to discuss

Tips for Best Results

- Write a detailed **Role Description** — the more specific, the better
- Set the **Welcome Message** to be inviting and relevant to your business
- Use **Banned Topics** to keep conversations focused

Knowledge Base

The knowledge base is the foundation of your AI agent. Without it, the agent can only make small talk.

Adding Content

Go to **Knowledge** in the sidebar, create a knowledge base, then add sources:

Method	Best For
Upload File	PDF, DOCX, TXT documents
Scrape Website	Automatically extract content from a URL
Add FAQ	Question-answer pairs (highest accuracy)
Import CSV	Product catalogues (Shopify/WooCommerce format)

Best Practices

1. **FAQ format gets the best results** — Add your most common questions as FAQ entries
2. **Be comprehensive** — The more content you provide, the better the AI performs
3. **Update regularly** — Keep knowledge current with new products, pricing, or policies
4. **Link to your agent** — Go to Agent > Knowledge Base tab to connect a knowledge base

Appearance & Themes

Go to your Agent > **Appearance** to customize the chat widget.

Available Themes

Theme	Style
Classic Blue	Professional blue — clean and trustworthy
Midnight	Dark mode — modern and sleek
Sunset	Warm orange/amber tones
Forest	Natural green palette
Minimal	Light gray, distraction-free

Customization Options

- **Brand Color** — Override the theme's primary color with your brand color
- **Chat Button Position** — Bottom-right or bottom-left
- **Live Preview** — See changes in real-time on the right panel

Deploying to Your Website

Go to your Agent > **Embed Code** for deployment options.

Option 1: Floating Chat Widget (Recommended)

Add this single line to your website's HTML, just before the closing body tag:

```
<script src="https://app.roodee.com.au/widget.js"
  data-agent-id="YOUR_AGENT_ID"></script>
```

Option 2: Standalone Chat Page

Each agent has a unique URL: `https://chat.roodee.com.au/your-company/your-agent`

You can also embed it as an iframe:

```
<iframe src="https://chat.roodee.com.au/your-company/your-agent"
  width="400" height="600"
  style="border:none;border-radius:12px"></iframe>
```

Lead Collection & Escalation

Lead Collection

Enable in Agent > Persona & Behavior > **Lead Collection**.

The AI naturally asks for contact details when visitors show interest. Collectible fields: Name, Email, Phone, Company.

View leads in the **Leads** sidebar page. Export as CSV anytime.

Human Escalation

Enable in Agent > Persona & Behavior > **Escalation**.

When the AI can't answer, it collects contact info and sends an email notification to your team with the full conversation.

Dashboard & Analytics

The **Overview** page shows your current plan, agent count, conversations this month, leads captured, and message usage with a progress bar.

Usage alerts: Yellow at 80%+, Red at 100% (AI stops responding until next month).

Billing & Plans

Plan	Price	Conversations	Knowledge Base
Trial	Free	50/month	300 KB
Starter	\$29/mo	500/month	300 KB
Growth	\$59/mo	3,000/month	1 MB

Business	\$119/mo	10,000/month	5 MB
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Annual billing saves ~17%. Manage at **Billing > Manage Subscription**.

Platform Integration Guide

WordPress

Add the widget script in **Appearance > Theme File Editor** before the closing body tag in `footer.php`, or use a "Custom HTML" block.

Shopify

Go to **Online Store > Themes > Edit Code > theme.liquid**, paste before the closing body tag.

Wix

Settings > Custom Code > Add Code, set placement to **Body - End**, apply to All Pages.

Squarespace

Settings > Advanced > Code Injection > Footer section.

Webflow

Project Settings > Custom Code > Footer Code section.

Any HTML Site

Add the script tag before the closing body tag.

FAQ

Q: Will the AI make up information? A: No. It only answers from your knowledge base. If it doesn't know, it says so.

Q: What languages are supported? A: English and Chinese, with automatic language detection.

Q: How do I improve answer quality? A: Upload more content, use FAQ format, write a detailed role description.

Q: What happens at the conversation limit? A: AI stops responding. No extra charges. Upgrade or wait for monthly reset.

Q: Will the widget slow my site? A: No. It loads asynchronously and is very lightweight.
