FLOGPT

Quick Start

The short, illustrated path to a working setup.

AI Chat & Voice Agents platform with a built-in CRM
flogpt.com/docs

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QUICK START · SECTION 1

Start here

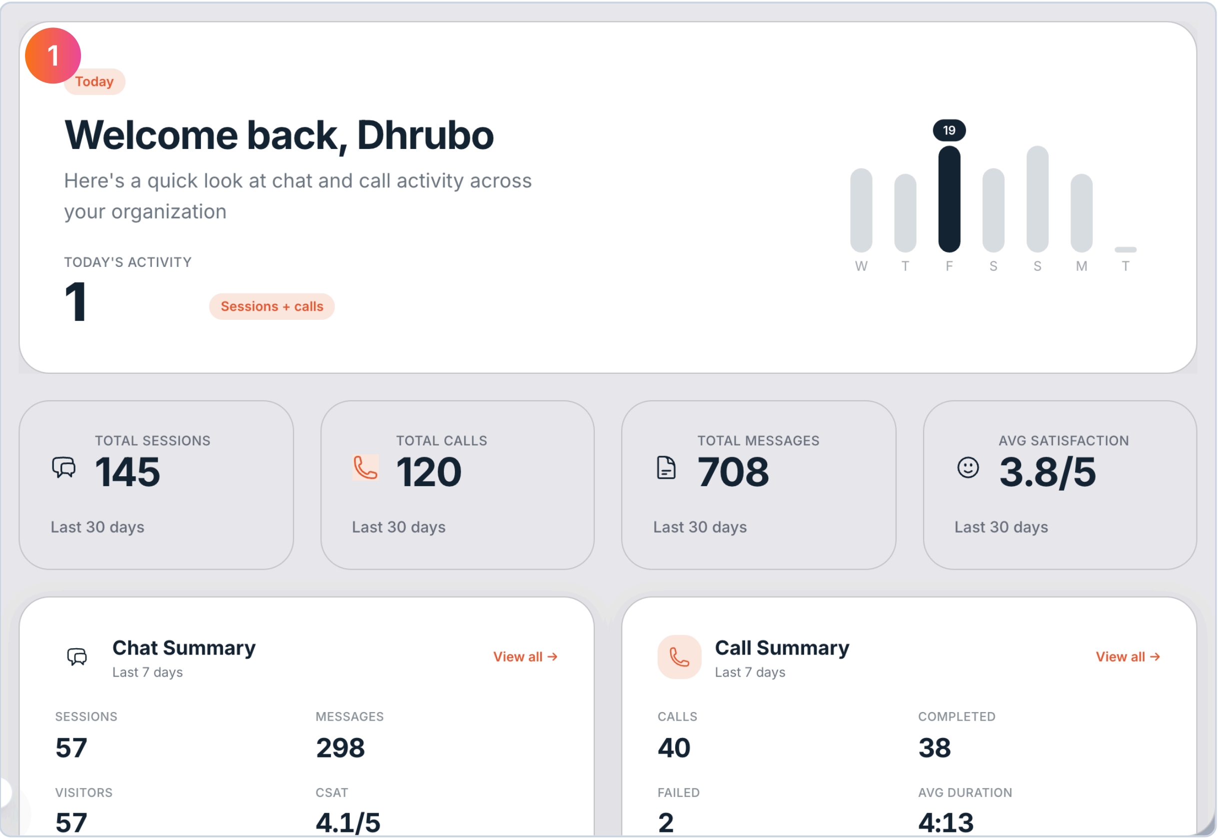
Create your workspace, invite your team, and get your first AI agent answering.

Welcome to FloGPT. This page gets you from a brand-new account to an AI assistant that answers real questions about your business, in five steps.

Budget about half an hour. You do not need a developer, and you do not need a phone number yet.

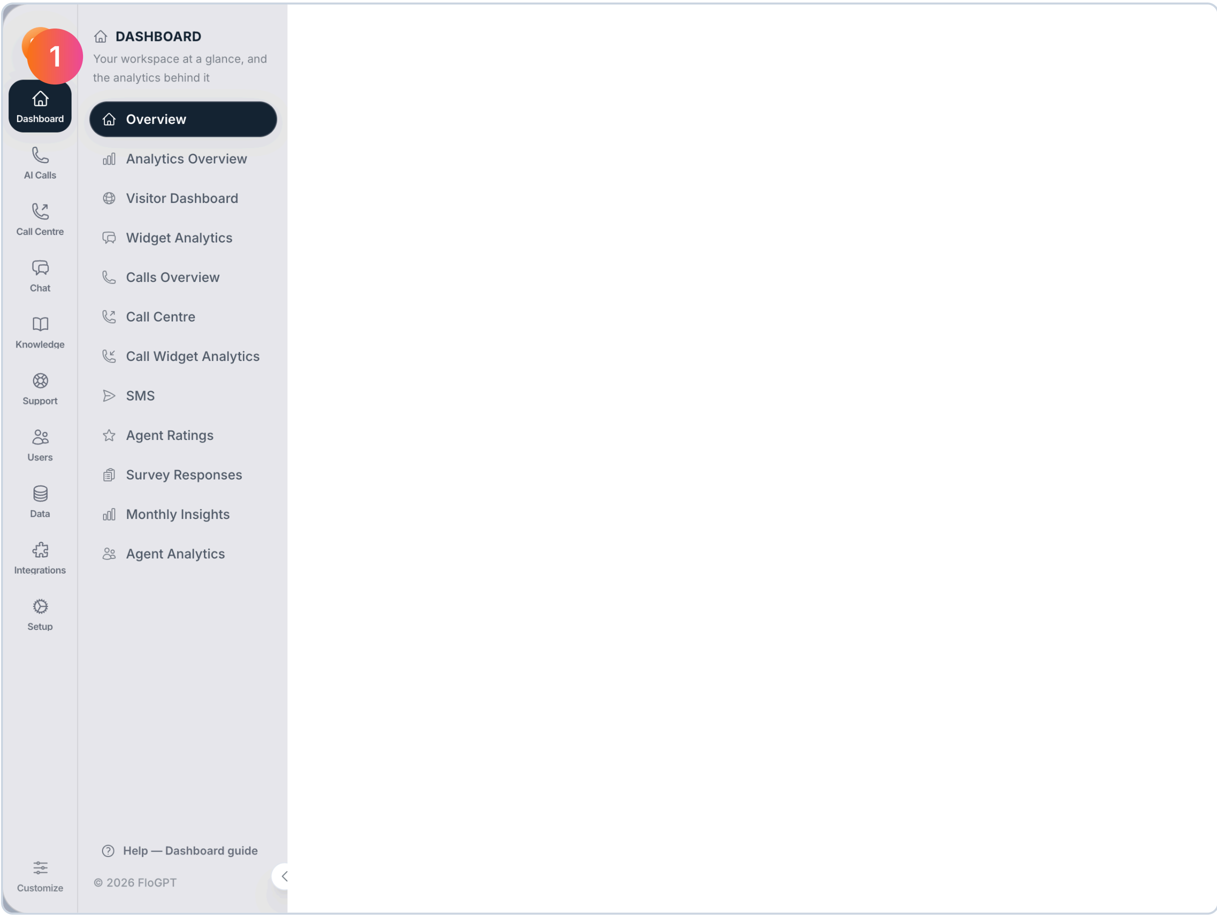
Step 1 — Find your way around

After you sign in you land on **Dashboard**. This is the summary view: **Total Sessions**, **Total Calls**, **Total Messages**, and **Avg Satisfaction** across the last 30 days, with **Chat Summary** and **Call Summary** panels underneath.



Step 1. The Dashboard you see right after signing in.

Everything else lives in the sidebar on the left. It has two parts: a narrow rail of icons for the top-level sections, and a panel listing the pages inside whichever section you picked.



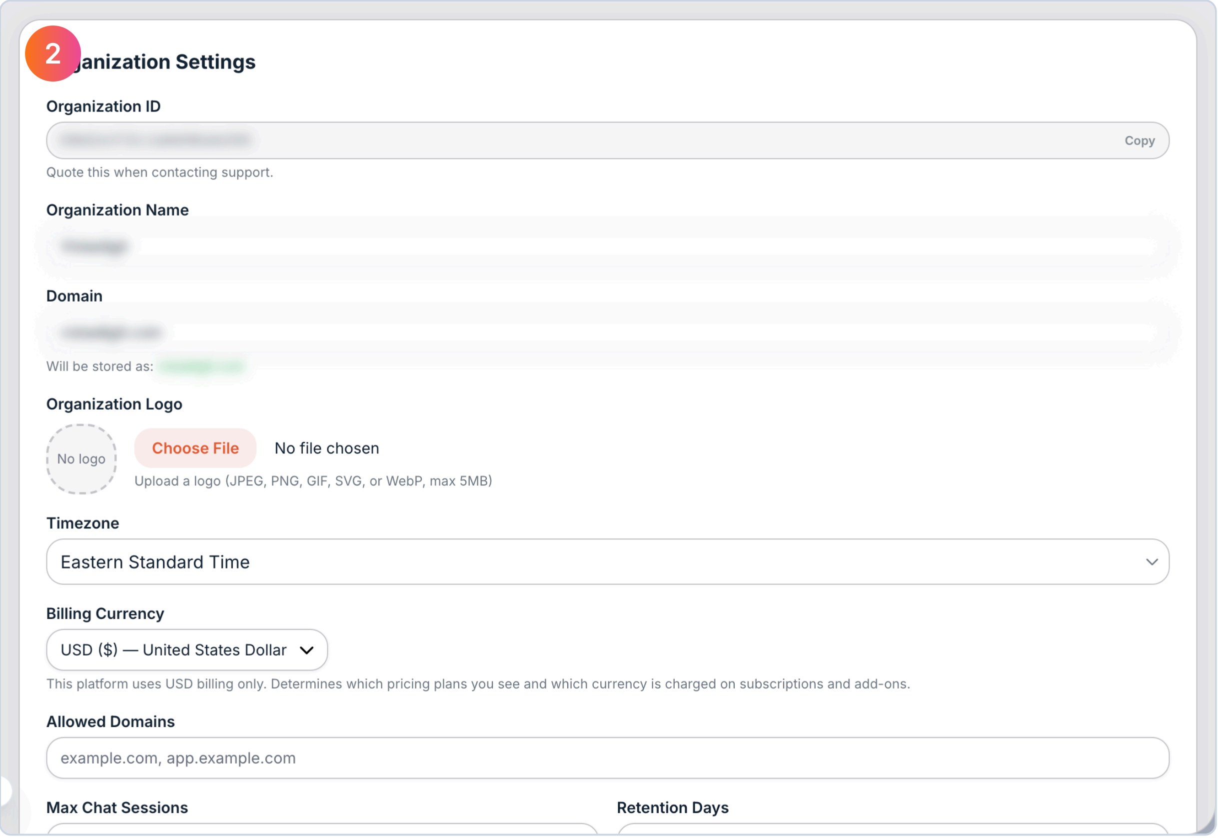
Step 1. The sidebar rail and its sub-panel. Section names here match the guides in these docs.

The sections are **Dashboard**, **AI Calls**, **Call Centre**, **Chat**, **Knowledge**, **Support**, **Users**, **Data**, **Integrations**, and **Setup**. Each one has a guide in these docs under the same name, with two exceptions: **Users** is covered by the Support guide, and the analytics pages inside **Dashboard** have their own Insights guide.

> If a section is missing from your sidebar, it is either hidden for your role or switched off for your workspace. Owners and admins can switch sections back on from the customise menu at the bottom of the rail.

Step 2 — Set up your organization

Go to **Setup → Organization**. This is your workspace: everyone you invite and everything you build belongs to it.



Step 2. Organization settings. Name, Domain, and Timezone are the ones that matter on day one.

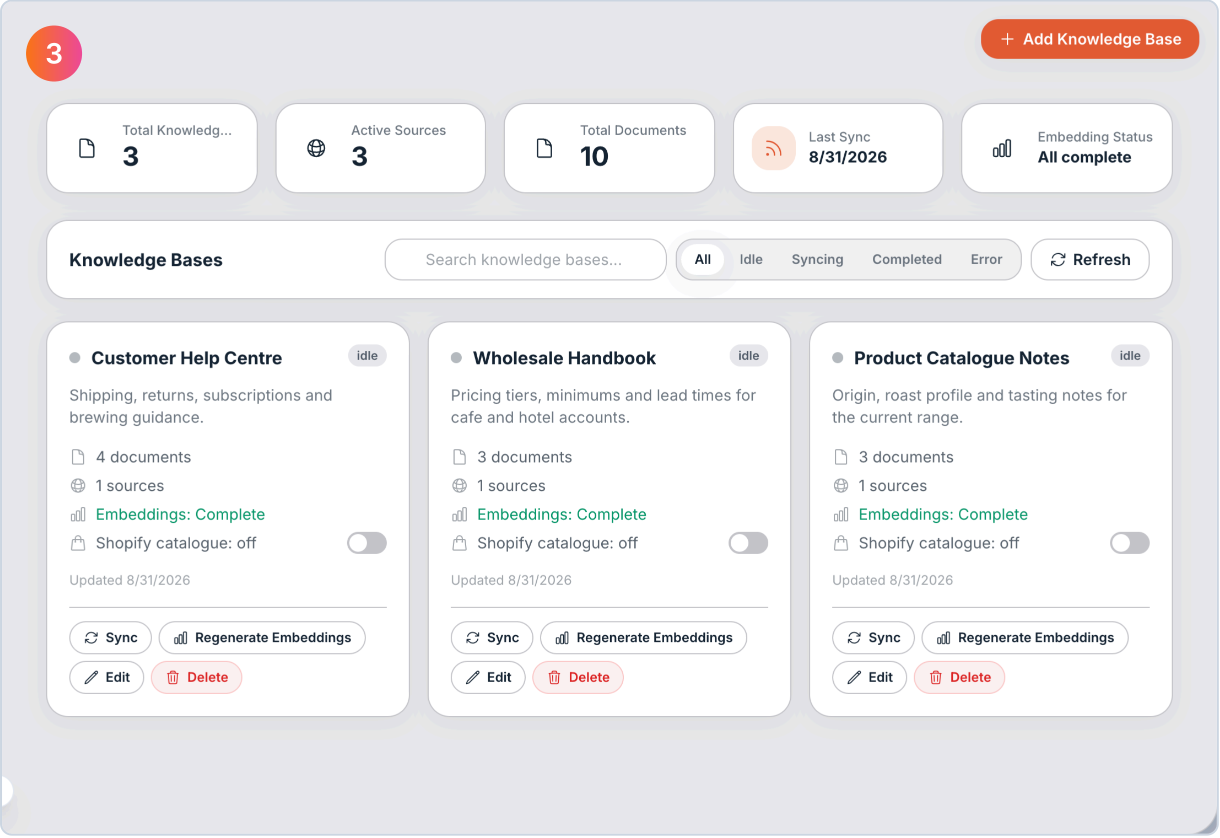
Fill in three fields and save with **Update Organization**:

- **Organization Name** — what your team sees in the workspace switcher.
- **Domain** — your website, like `example.com`. The chat widget uses this to decide which sites are allowed to load it.
- **Timezone** — every calling window, business-hours rule, and scheduled report is interpreted in this timezone. Getting it wrong is the single most common cause of "why did it call at 3am".

There is also an **Organization ID** at the top of this page. Copy it if you ever contact support.

Step 3 — Give the AI something to know

Go to **Knowledge → Overview** and press **Add Knowledge Base**. Give it a name and press **Create**.



Step 3. The Knowledge overview, where your knowledge bases and their sync state live.

Now fill it. The fastest route is **Knowledge → Web Crawler**: paste your site into **Website URL**, pick the knowledge base you just made, and press **Start Crawl**. FloGPT reads your pages, splits them into chunks, and indexes them so the AI can quote them back with citations.

You can also upload PDFs and documents from **Knowledge → Documents**.

This step is what separates an assistant that knows your refund policy from one that invents one. Do not skip it.

Step 4 — Put a chat widget on your site

Go to **Chat → Widgets** and press **Create Widget**. You need:

- **Widget Name** — internal only.
- **Allowed Domains** — the sites permitted to show this widget, comma separated.
- **Knowledge Base (Optional)** — pick the one from step 3. Do pick it.

Press **Create**. Then on the widget's card press **Code**, and copy the `<script>` block from the **Integration Code** section into your site's HTML just before the closing `</body>` tag.

Reload your site and the widget appears. Most teams have chat live in under 30 minutes.

Full detail, including appearance and workflows, is in the Chat quick start.

Step 5 — Try it, then invite your team

Talk to your own widget the way a customer would. Ask something only your website answers. If the reply is vague, your knowledge base needs more content — go back to step 3 rather than rewriting prompts.

When it holds up, invite people from **Users → Agents** (owners only) or **Users → Admins**. Roles decide what each person sees:

Role	Broadly speaking
Owner	Everything, including billing and organization settings
Admin	Everything operational; no organization-level settings
Editor	Builds and configures; no billing
Supervisor	Runs the support and calling floor, sees every rep
Agent	Handles their own conversations and calls only

Where to go next

- Want your phone answered by AI? AI Calls quick start — voice agents are usually live within an hour.
- Have human reps making outbound calls? Call Centre quick start.
- Want the AI to follow a scripted conversation? Chat quick start covers the workflow builder.
- Selling on Shopify? The Shopify integration guide is a separate, deeper walkthrough.

QUICK START · SECTION 2

Dashboard

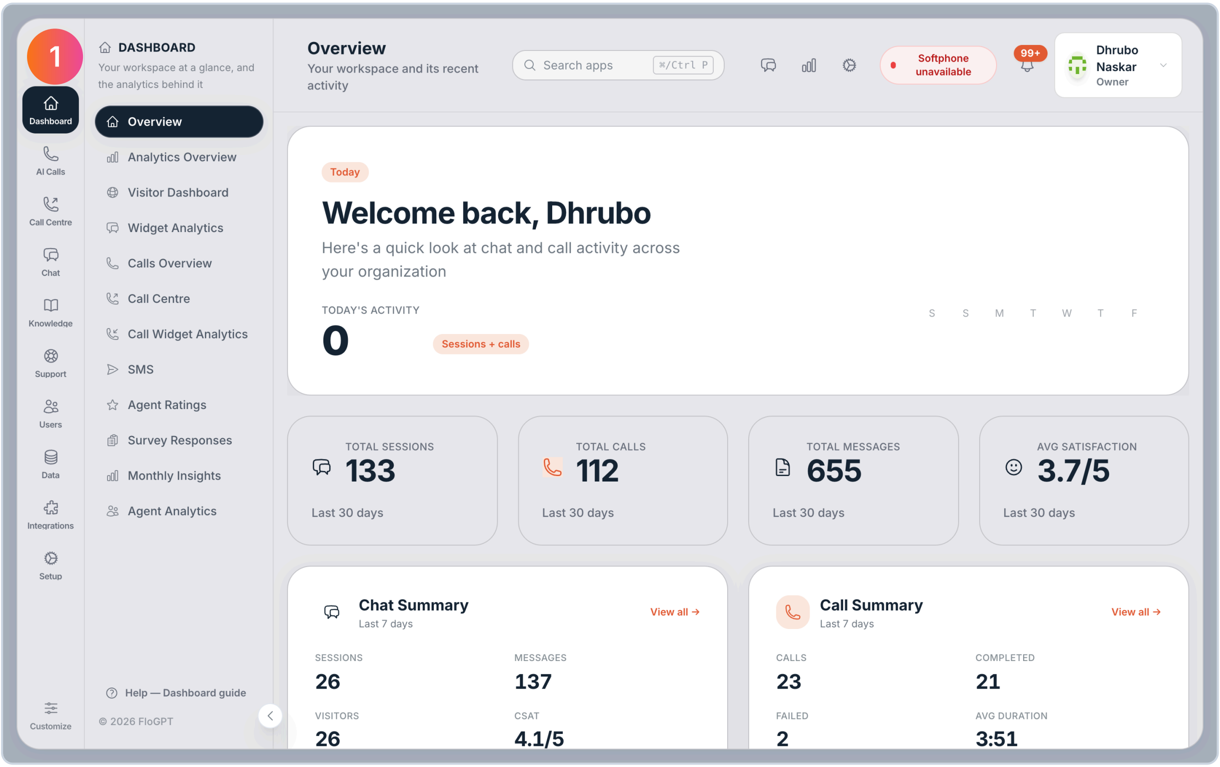
Your post-login landing page: what the tiles mean and how the view changes by role.

Dashboard sidebar: Dashboard

Dashboard is where you land after signing in — **Dashboard → Overview** in the sidebar. It is a read-only summary; nothing is configured here.

The rest of the **Dashboard** section is every analytics page in the product, listed below this one. They used to be a separate **Insights** section and are covered in the Insights guide.

What you see on this page depends on your role: owners and admins get the workspace-wide view described below, while agents and supervisors get a dashboard scoped to their own work.



Step 1. The Dashboard. The four tiles cover 30 days; the summaries below cover 7.

Step 1 — Read the four tiles

Across the top, over the last 30 days: **Total Sessions**, **Total Calls**, **Total Messages**, and **Avg Satisfaction** (out of 5).

`0/5` satisfaction means nobody has rated anything yet — it does not mean bad scores.

Step 2 — Check Chat Summary

Last 7 days: **Sessions**, **Messages**, **Visitors**, **CSAT**. **View all** jumps to **Analytics Overview**, the next entry down in the same section.

Two of these read differently than you might assume. **Visitors** counts each person once *per day*, so a repeat visitor shows up several times in a week. **CSAT** is the most recent day that had a rating, not an average of the week.

Step 3 — Check Call Summary

Last 7 days: **Calls**, **Completed**, **Failed**, **Avg Duration**.

Failed counts only calls the phone network marked as failed — unanswered and busy calls are not in it.

Step 4 — Scan Recent Calls

The latest five calls from your call widgets, newest first. This list ignores the 7-day window, so a call here may not be counted in the summary above. Empty until your call widgets are live.

Step 5 — Use the quick actions

Cards for **Workflows**, **Knowledge Base**, and **Analytics** that jump straight to those pages. In a new workspace the middle card reads **Create Knowledge Base**, which is a good next move.

Two things worth knowing

There is **no refresh button** — reload the page to update the numbers.

Every window here is measured in **UTC**, not your organization's timezone, which is the usual reason a figure here differs slightly from the same figure on the analytics pages.

Where to go next

- Every metric, how it is calculated, and the role-by-role differences: Dashboard manual
- Start here for first-run setup

- Insights — the analytics pages under this same section

QUICK START · SECTION 3

Insights

Analytics across chat, voice, the calling floor, SMS, agent ratings, surveys, and website visitors — all under Dashboard.

Dashboard sidebar: Dashboard

Who can see this: Every entry here is hidden from agents, who see only the Dashboard overview.

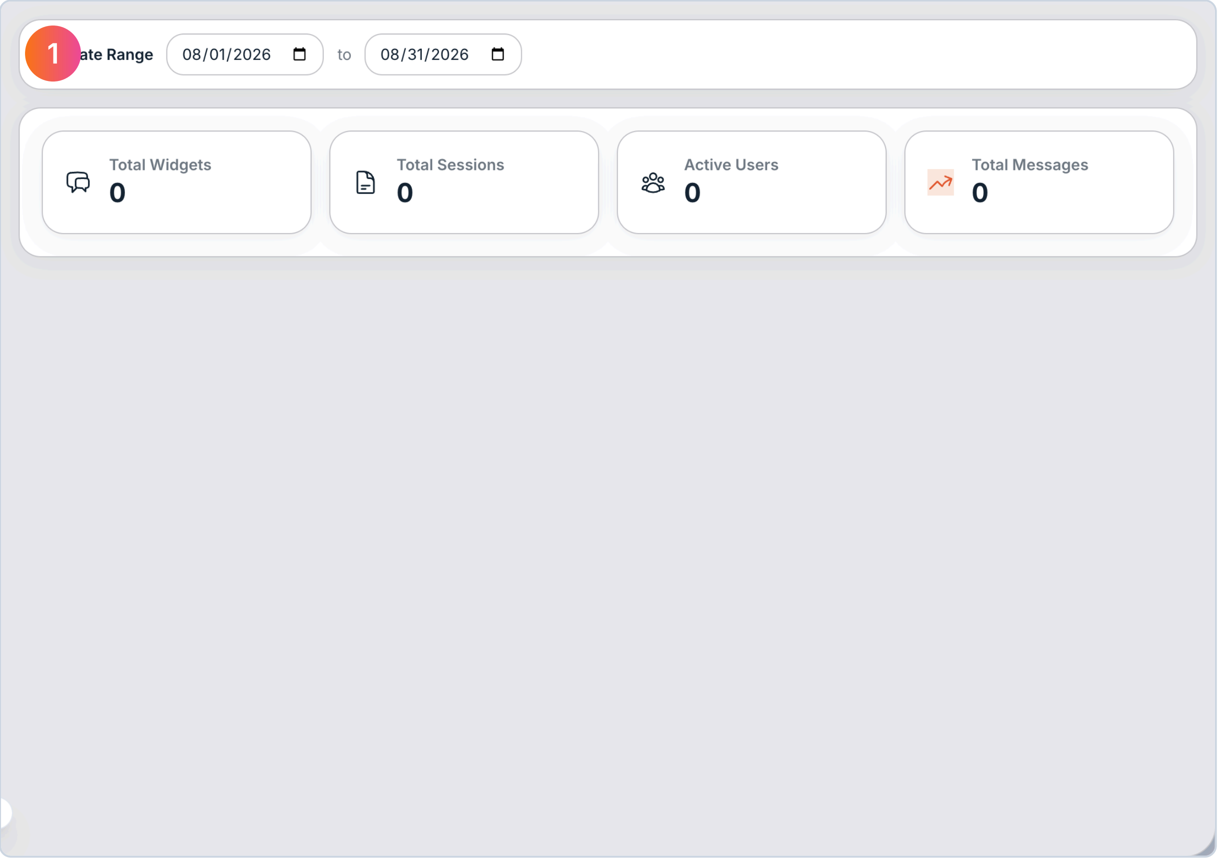
Every analytics screen in the product: chat widgets, AI calls, the human calling floor, SMS spend, agent ratings, post-chat surveys, and website visitors. They all live in the sidebar's **Dashboard** section, below the **Overview** entry that opens the landing page itself.

> These pages used to sit in their own **Insights** section. They now sit under **Dashboard**, so the summary tiles and the analytics behind them are one click apart. Nothing about the pages themselves changed, and every URL still works.

Every entry below is hidden from agents, who see only **Dashboard → Overview**. Most are visible to owners and admins; **Call Centre** is the one supervisors can see, and **Agent Analytics** is for supervisors and owners.

Step 1 — Set the date range once

Nearly every tab shares one **Date Range** control at the top: two date pickers with **to** between them. It defaults to the **last 30 days** ending today, and there are no preset buttons — you type or pick the dates.



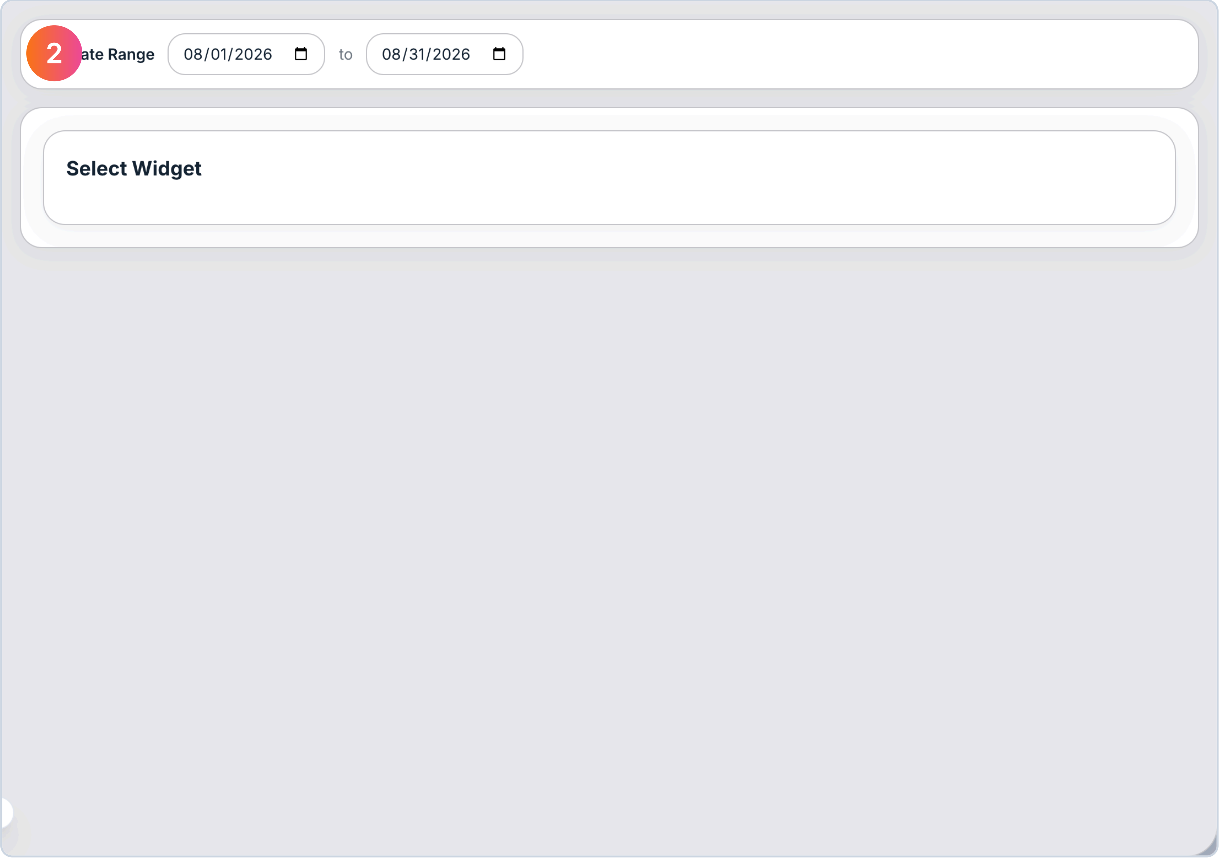
Step 1. Dashboard → Analytics Overview. The Date Range at the top applies to almost every tab.

Change it once and it carries across Analytics Overview, Widget Analytics, Calls, Call Widgets, Call Centre, SMS, and Survey Responses. Three entries ignore it: **Monthly Insights** has its own month and year pickers, **Agent Ratings** is all-time, and **Visitor Dashboard** has its own widget and date filters — it is a separate page rather than an `/analytics/*` tab, covered in the Data guide.

Dashboard → Analytics Overview gives you the top line for that range: **Total Widgets**, **Total Sessions**, **Active Users**, **Total Messages**, a **Trends Over Time** chart, and **Widget Performance** per widget. It is named **Analytics Overview** rather than plain Overview, which is the landing page one entry above it.

Step 2 — Look at one chat widget

Go to **Widget Analytics** and pick a widget from the **Select Widget** grid.



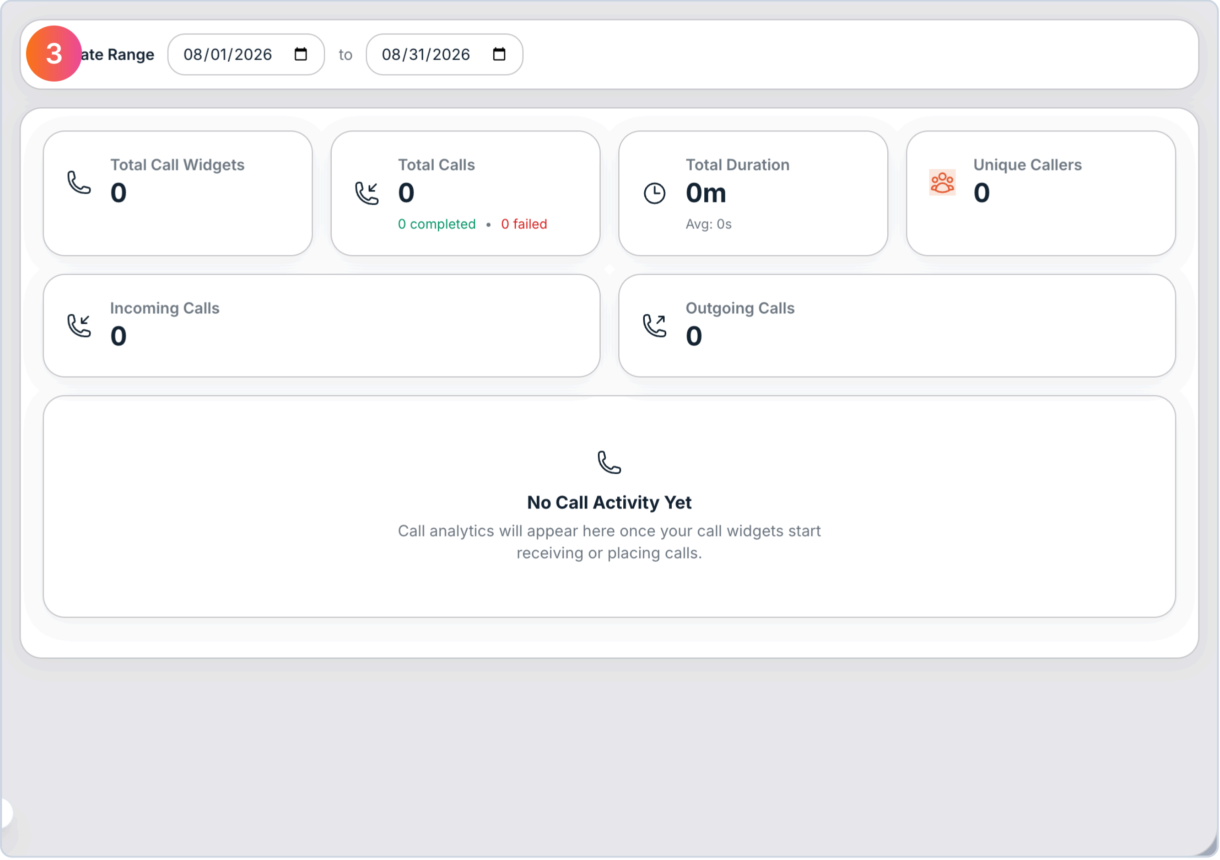
Step 2. Widget Analytics. Pick a widget first; nothing loads until you do.

You get **Total Sessions**, **Total Messages**, **Avg Duration**, and **Satisfaction**, then **Messages by Day**, **Top Intents**, **Device Breakdown**, and **Location Breakdown**.

Top Intents is the one to read first. It tells you what people are actually asking, which is the best guide to what your knowledge base is missing.

Step 3 — Look at your calls

Calls Overview covers every call in the range — AI and human, inbound and outbound.



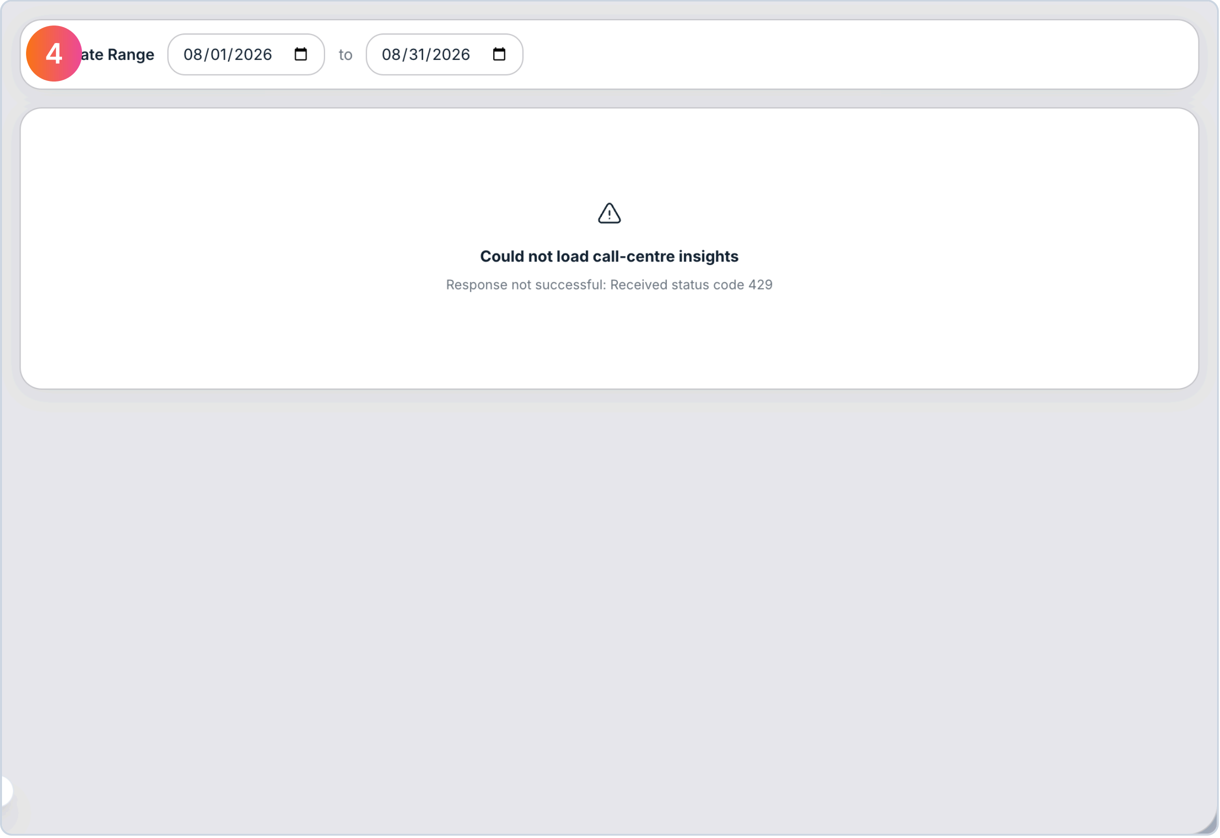
Step 3. Calls Overview. Every call in the range, with status and sentiment breakdowns.

Tiles: **Total Call Widgets**, **Total Calls** (with completed and failed underneath), **Total Duration**, **Unique Callers**, **Incoming Calls**, **Outgoing Calls**. Below those, **Calls Over Time**, **Talk Time (minutes)**, **Call Widget Performance**, and donuts for **Status Breakdown**, **Sentiment**, and **Provider Breakdown**.

For one specific voice agent, use **Call Widget Analytics** and pick it from **Select Call Widget**.

Step 4 — Check the calling floor

Call Centre is the only tab about **humans dialling**, and the only one counted in your organization's timezone rather than UTC. It needs a call-centre phone number on the workspace to show anything.



Step 4. Dashboard → Call Centre. Rep dials, connect rate, and speed to lead.

The numbers to watch: **Connect rate**, **Wrap-up filed**, and **Speed to lead** — which buckets leads into **Within five minutes**, **Within an hour**, **Within a day**, and **Never rung**. That last bucket is usually the most actionable figure in the whole set.

By rep is a sortable table with each rep's dials, connect rate, talk time, wins, and percentage of target.

Step 5 — Read what customers said

Two tabs cover feedback.

Survey Responses shows post-chat surveys with **Total responses**, **Average CSAT** out of 5, **NPS**, and an **AI vs agent** split. You can filter to **All channels**, **AI-only chats**, or **Agent-resolved chats**.

Agent Ratings shows how customers rated your people. It is **all-time** and ignores the date range.

Step 6 — Get the monthly write-up

Monthly Insights takes a month and year rather than a date range, and gives you sentiment breakdowns, top chat keywords and topics, and top call intents, each with a month-over-month delta.

If your workspace has scheduled reports switched on in Setup, a version of this is also emailed on the first of each month.

Where to go next

- Every metric, exactly how it is calculated, and every role gate: Insights manual
- Why a number here differs from the tiles on Dashboard → Overview
- Call Centre for the floor these figures describe

> There is no CSV, Excel, or PDF export on any of these pages. If you need the underlying rows, export from the source — leads from Call Centre, or rows from a data collection in Data.

QUICK START · SECTION 4

AI Calls

Stand up an AI voice agent that answers your phone, then route, log, and dial out with it.

Dashboard sidebar: AI Calls

Who can see this: Hidden from agents and supervisors.

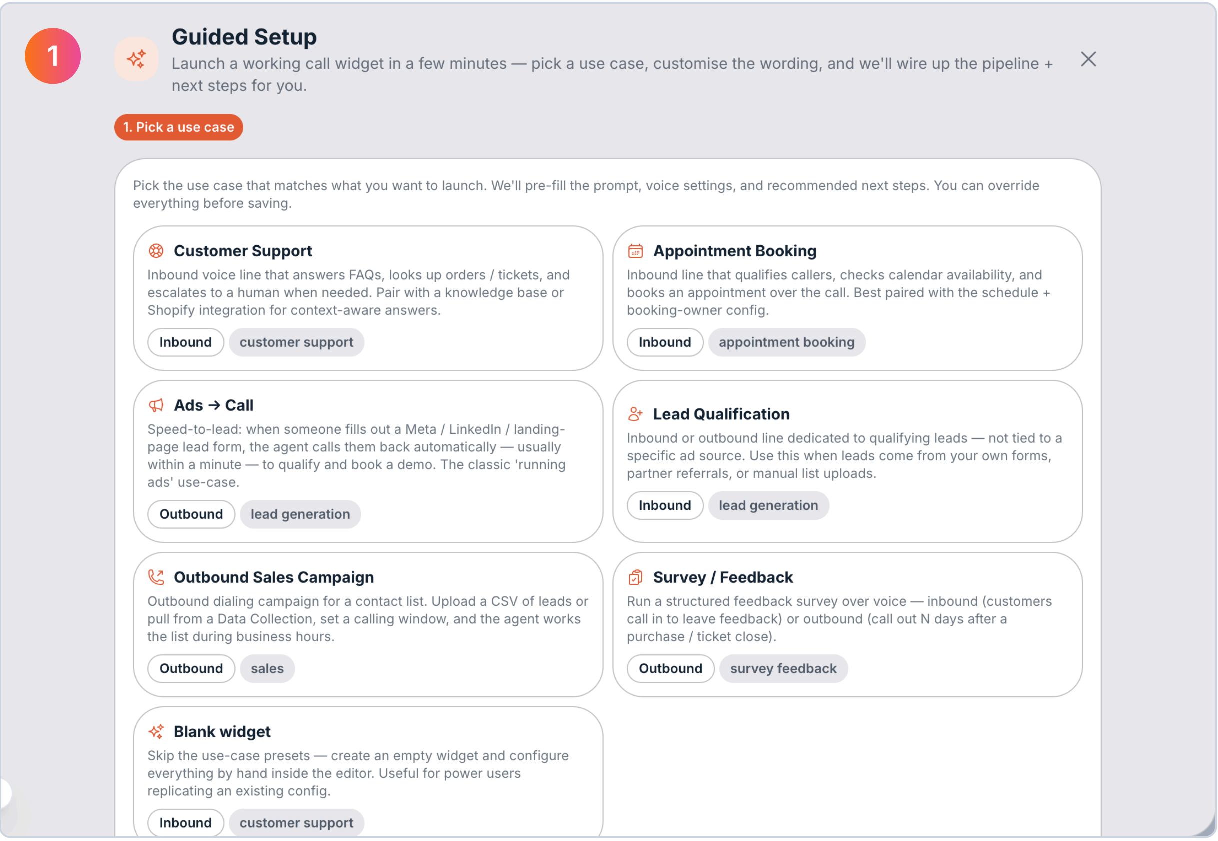
AI Calls is the AI voice agent: it answers your phone, and it can place calls out. The sidebar section is **AI Calls**, and its pages are **Call Widgets**, **Call Pipeline**, **Phone Numbers**, **Call Logs**, and **Campaigns**.

This page uses the guided wizard, which is the fastest way to a working agent. Most teams have voice live in under an hour.

Before you start, work through the Start here guide — a voice agent with no knowledge base can only follow its prompt, and that is a much weaker agent.

Step 1 — Open Guided Setup and pick a use case

Go to **AI Calls → Call Widgets** and press **Guided Setup**. The first step is **Pick a use case**.



Step 1. Guided Setup opens on "Pick a use case". The blueprint pre-fills the prompt, voice settings, and recommended next steps.

Choose the blueprint closest to what you want: customer support, appointment booking, lead generation, outbound sales, survey and feedback, ads-to-call, or a blank agent. The blueprint decides which of the later steps you see and pre-fills the wording — you can change all of it.

Press **Next**.

Step 2 — Name it, and pick language and country

On **Identity** you fill in three things:

- **Widget name** — internal, so make it recognisable, e.g. `Front desk — inbound`.
- **Primary language** — FloGPT supports 16 voice languages including Hindi and nine Indic locales.
- **Operating country** — this is the important one. It decides how you get a phone number.

Countries split into two groups. **United States, Canada, United Kingdom, Australia, Ireland, and New Zealand** are self-serve, marked *Self-serve · instant* — you can buy a number yourself in seconds. **India** and other markets are marked *Manual provisioning · admin reviews within 1 business day*, because carrier paperwork such as DLT and KYC needs a human step.

Press **Next**.

Step 3 — Write the greeting and the prompt

On **Voice behavior** the blueprint has already filled both fields. Read them and make them sound like you.

- **Welcome message** — spoken at the start of the call. Keep it under 15 seconds.
- **System prompt** — the full instruction the agent follows on every call. 100 to 500 words is the sweet spot.

The single highest-value edit here is telling the agent what *not* to do: what it must never promise, quote, or diagnose, and when it should hand over to a person instead.

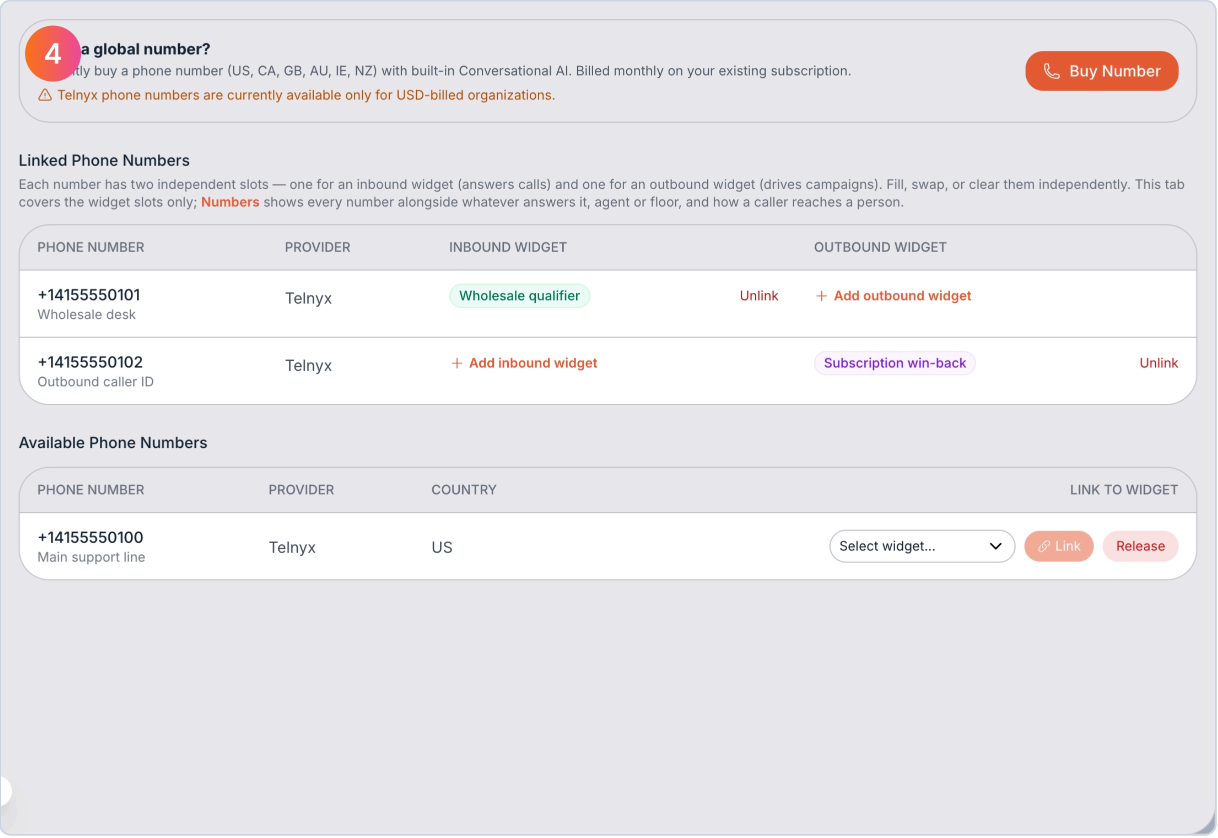
Press **Next**.

Step 4 — Deal with the phone number

On **Phone number** you pick one of four options:

- **Link an existing number** — you already own a free number on this workspace.
- **Buy a phone number** — search and purchase instantly. Self-serve countries only. It becomes a recurring item on your subscription.
- **Request a number** — files a request with the ops team. This is the path for India and other manual-provisioning markets.
- **Skip for now** — create the agent and attach a number later.

Skipping is fine. Nothing else in the wizard depends on it, and you can attach a number any time from **AI Calls → Phone Numbers**.



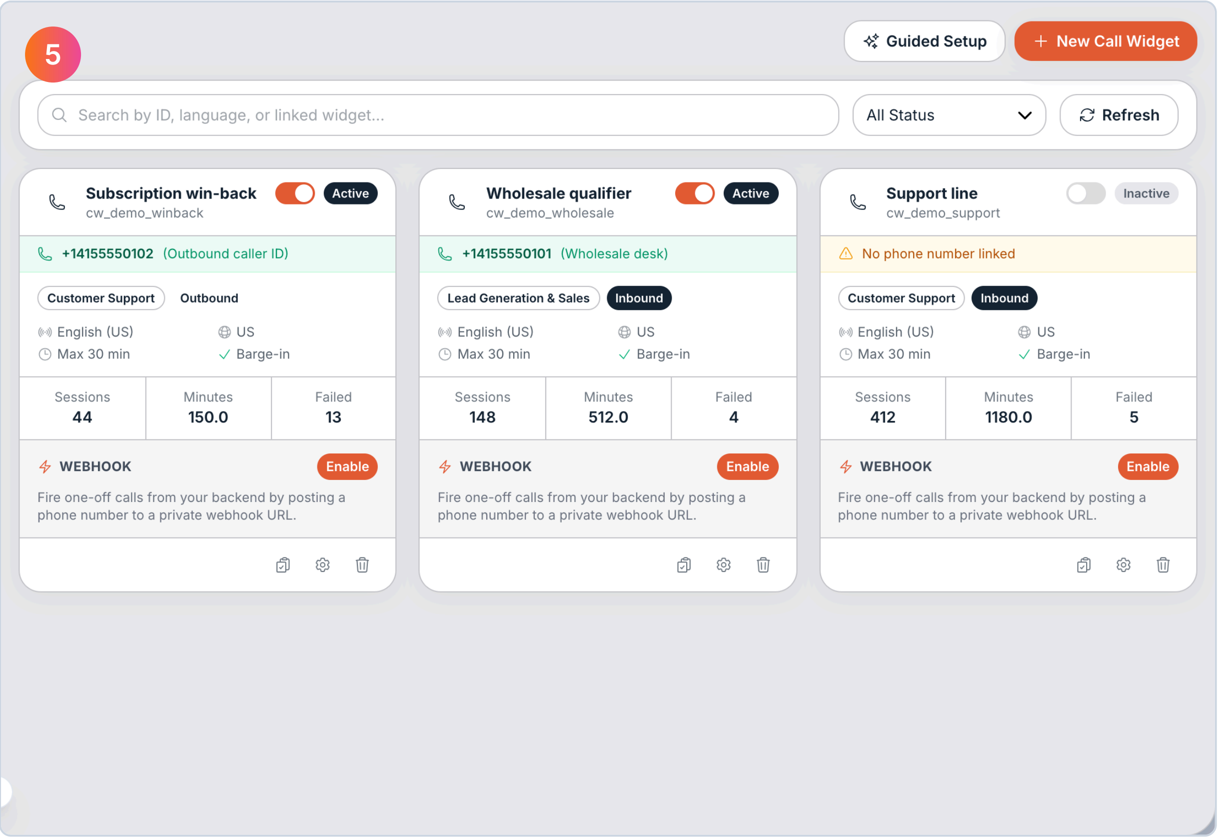
Step 4. Phone Numbers. "Linked Phone Numbers" shows what each number answers with; "Available Phone Numbers" is where you attach one.

Each number has two independent slots — one **inbound widget** that answers calls, and one **outbound widget** that drives campaigns. One number can therefore host both an answering agent and a dialling agent at once.

Press **Next**, review the summary, then press **Create widget**.

Step 5 — Finish setup, then make a test call

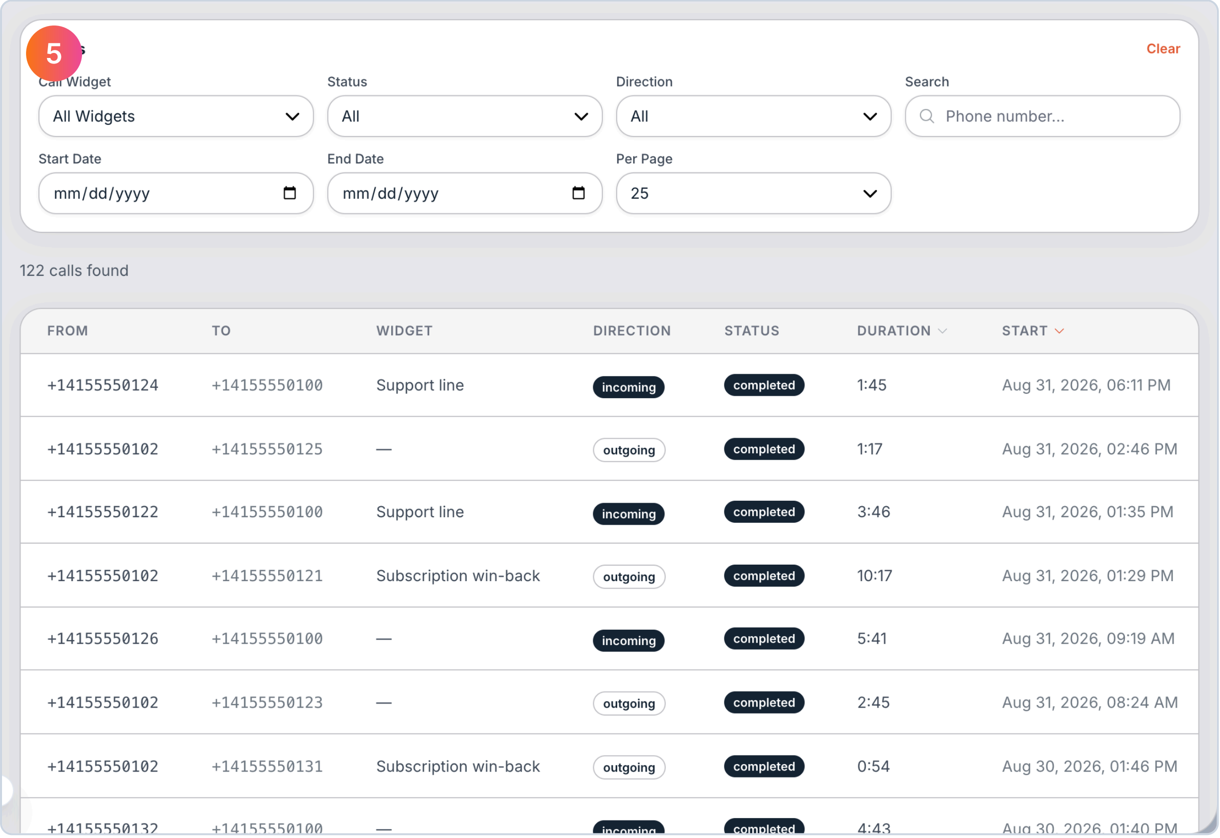
After creation you land on **Finish setup**, a checklist of what still stands between you and a working call. It is generated from what you skipped, so it might include buying a number, wiring a lead source, creating a campaign, configuring a schedule, or getting the embed snippet. Work through it and press **Mark as done** on each, then **Finish & view widget**.



Step 5. The finished agent on the Call Widgets page. The Active toggle stays locked until a phone number is linked.

The **Active** toggle on the widget card cannot be switched on until a phone number is linked — the tooltip says *Link a phone number to activate*. That is the check to make if your agent seems dead.

Now call the number yourself. Then go to **AI Calls → Call Logs**.



Step 5. Call Logs. Every call with direction, status, duration, sentiment, and a Transcript button.

Your call appears with **From**, **To**, **Widget**, **Direction**, **Status**, **Duration**, and **Sentiment**. Press **Transcript** to read what was actually said and hear the recording. Reading the first three transcripts teaches you more about your prompt than any amount of editing it in the abstract.

What to do after that

- **Call Pipeline** turns a single prompt into a branching conversation that routes by intent and captures typed fields. Covered in the AI Calls manual.
- **Campaigns** dials a list of contacts inside a calling window you set, with concurrency and retry limits.
- Lead-form triggers call new leads automatically, usually within a minute of the form being submitted.
- If humans also need to make and take calls, that is a different section: Call Centre.

Before you dial out to anyone

Outbound calling is regulated, and FloGPT gives you controls rather than automatic compliance. Read the "Outbound calling responsibilities" section of the AI Calls manual before you run a campaign. In particular: the quiet-hours and do-not-call controls are **off by default**, and uploaded-list campaigns do not apply them at all — only the campaign's own calling window applies.

QUICK START · SECTION 5

Call Centre

The human calling floor: dialer, lead queue, inbound handling, scripts, routing, and supervision.

Dashboard sidebar: Call Centre

Who can see this: Every role sees this section, but Follow-ups, Floor, Routing, Numbers, and Usage are gated.

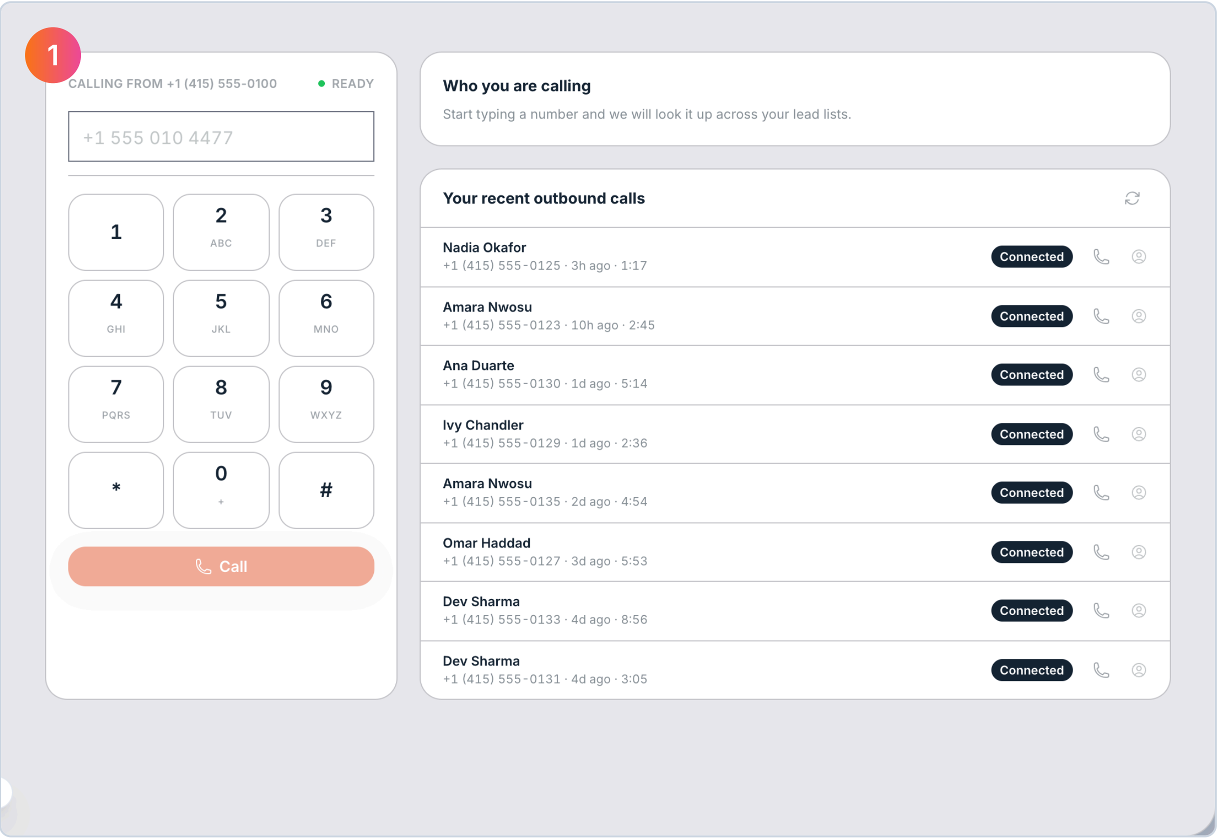
Call Centre is the section where *people* make and take calls. It is separate from **AI Calls**, which is where the AI does. If you have reps with headsets, this is their section.

Two things have to be true before anything here works: your workspace needs a phone number, and telephony has to be configured. If either is missing, every page tells you which one and what to do about it.

This guide is written for a rep on their first day, then points supervisors at what only they can see.

Step 1 — Place your first call from the Dialer

Go to **Call Centre → Dialer**. This is where a rep spends the day.



Step 1. The Dialer. Your caller ID and softphone status are top-left, the keypad below, and the matched lead on the right.

Check the top-left corner first. It shows which number you are **Calling from**, and underneath, **Ready** once your softphone has registered. If it says anything else, you cannot dial yet.

Then:

1. Type the number, use the on-screen keypad, or just start typing digits anywhere on the page.
2. As you type, FloGPT looks the number up across your lead lists and shows who it is under **Who you are calling** — with their pipeline status and when they were last contacted.
3. Press **Call**. While a call is up the button reads **On a call**.

At the top of the page, **Your day** tracks your **Dials**, **Connected**, **Connect rate**, **Talk time**, **Leads touched**, and **Won** against your daily target.

Step 2 — Log the call when it ends

When you hang up, the wrap-up dialog opens by itself, titled **Log call**. This is not optional busywork — an undispositioned call cannot move a lead through the pipeline, and it is what coaching reads later.

Pick an **Outcome**: **Connected**, **No answer**, **Busy**, **Unreachable**, **Voicemail**, **Wrong number**, or **Failed**. FloGPT pre-selects one from the carrier's hangup reason; change it if you know better.

Then fill in what you can:

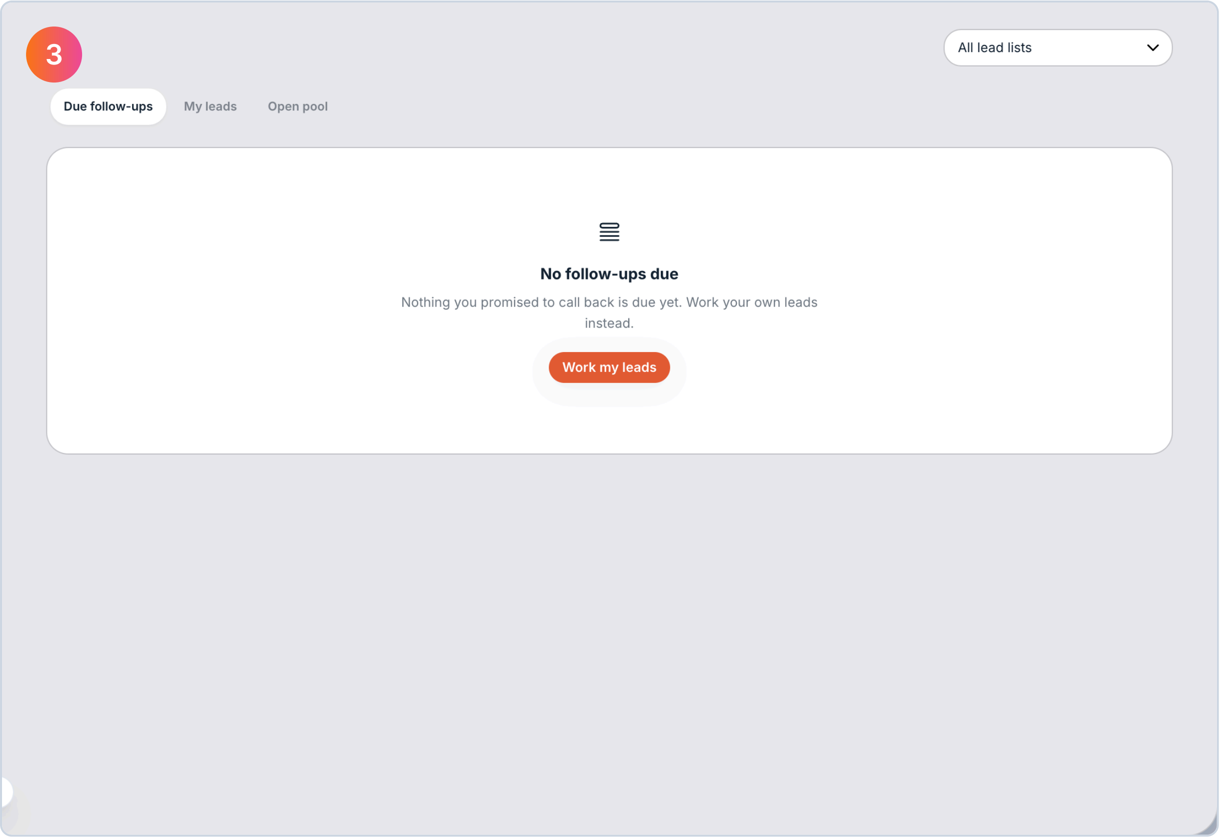
- **Your note** — internal. What you took away from the call.
- **What the caller said** — verbatim where you can.
- **Pipeline status**, **Potential**, and **Follow up** on the matched lead.

Press **Save call**.

Step 3 — Work the Queue instead of guessing who to call

Go to **Call Centre → Queue**. It decides the order for you, across three tabs:

- **Due follow-ups** — callbacks you promised that are now due. Start here every morning.
- **My leads** — everything assigned to you that is still open.
- **Open pool** — unassigned leads. Press **Claim this lead** to take one.

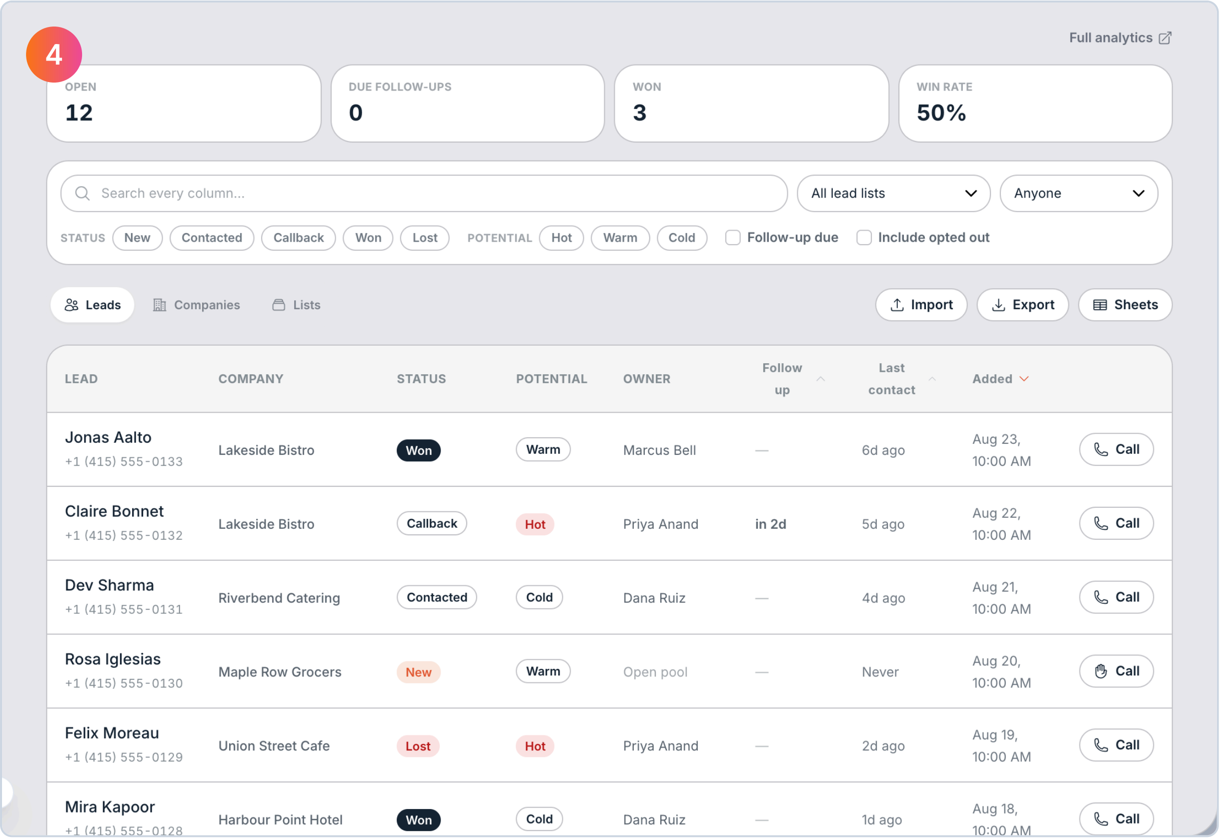


Step 3. The Queue. One lead at a time, with "Up next" on the right and a running position count.

The queue shows one lead at a time with **Call** and **Skip**, a position counter reading *n of total*, and an **Up next** list on the right.

Step 4 — Use Leads when you need to search rather than be fed

Go to **Call Centre → Leads** for the whole book. Four summary tiles across the top — **Open**, **Due follow-ups**, **Won**, **Win rate** — then three tabs: **Leads**, **Companies**, and **Lists**.



Step 4. The Leads page, with filters across the top and a Call button on every row.

Filter by lead list, owner (**Anyone**, **Mine**, **Open pool**), status (**New**, **Contacted**, **Callback**, **Won**, **Lost**), and potential (**Hot**, **Warm**, **Cold**). There are also **Follow-up due** and **Include opted out** checkboxes.

Click any row to open the lead, or press **Call** to dial it straight away.

To get leads in, use **Import** and upload a CSV or Excel file. A row matching an existing lead updates it rather than creating a duplicate.

> If you are an agent, the owner filter defaults to **Mine** and you cannot see other reps' books. That is intentional.

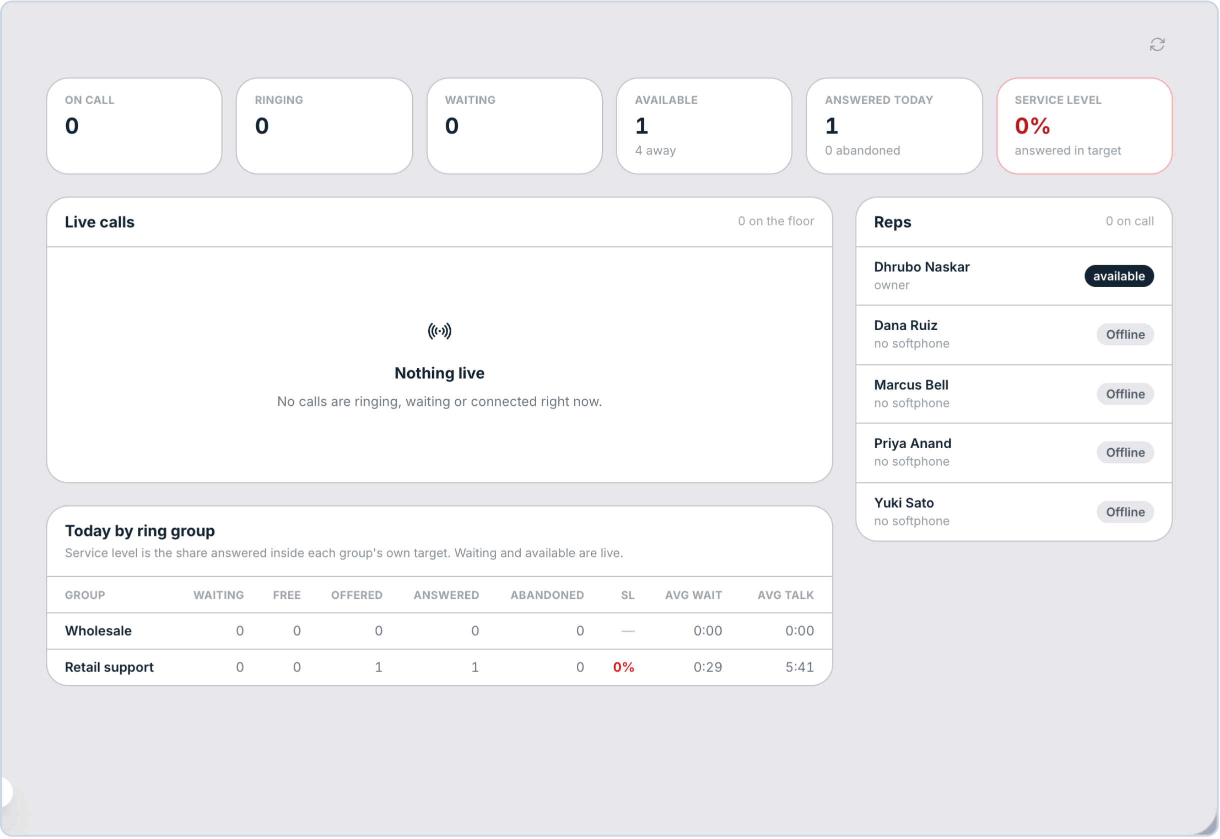
Step 5 — Pick up what you missed

Go to **Call Centre → Missed** for calls that rang and went unanswered. Each row shows the **Caller**, the **Reason** it was missed, the **Voicemail** if one was left, and **When**. Press **Call back**, or **Returned** marks itself once you have.

Call Centre → History is every call you handled, searchable by number and note, filterable by direction and outcome, with a **Needs wrap-up** checkbox that finds the calls you forgot to log.

If you supervise the floor

Call Centre → Floor is the wallboard — every live call, every queue, and today against target. Live totals across the top: **On call**, **Ringing**, **Waiting**, **Available**, **Answered today**, **Service level**.



The Floor wallboard. Supervisors and above only — agents and editors cannot open it.

You can **Listen** to a live call without being heard, **Whisper** to coach the rep with the caller unable to hear you, or **Join** so everyone hears you. **End** hangs the call up for everyone.

Five pages in this section are gated:

Page	Who can open it
Follow-ups	Not agents, not editors
Floor	Not agents, not editors
Routing	Not agents, not editors
Numbers	Not agents
Usage	Owners and admins only

The three you will need to set up before the floor works are **Numbers** (what answers each number), **Routing** (ring groups, phone menus, and rep skills), and **Follow-ups** (rules that chase a lead automatically). All three are covered in the Call Centre manual.

Where to go next

- Full page-by-page reference, including routing and follow-up rules: Call Centre manual.
- Want the AI to answer instead of a person? AI Calls.
- Rep performance and speed-to-lead reporting lives in **Dashboard → Call Centre**.

QUICK START · SECTION 6

Chat

Put an AI chat widget on your site and build the conversation workflows behind it.

Dashboard sidebar: Chat

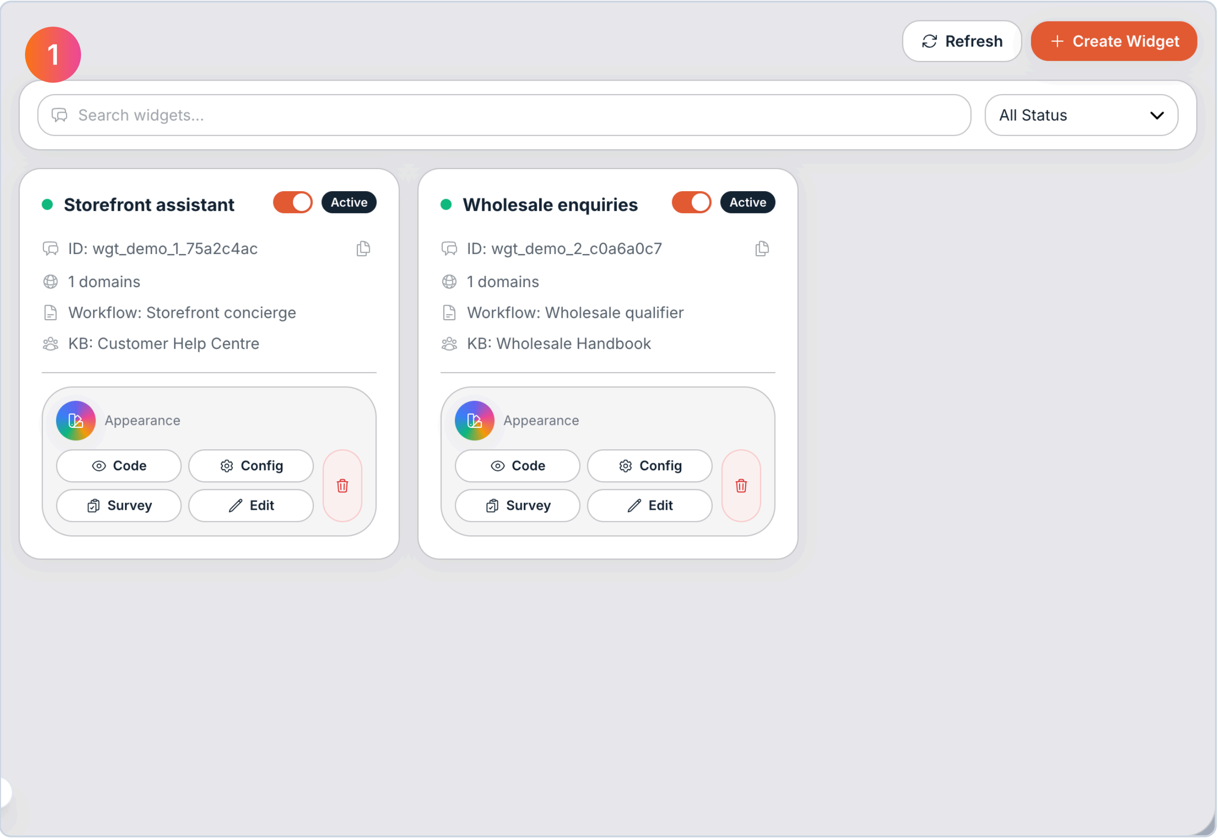
Who can see this: Hidden from agents and supervisors.

Chat is the AI chat widget you embed on your website, plus the conversation workflows it runs. The sidebar section is **Chat**, and its pages are **Widgets**, **Test Widgets**, and **Workflows**.

Chat is the fastest thing to get live in FloGPT — under 30 minutes is normal. Do the Start here guide first if you have not created a knowledge base yet, because that is what makes the answers yours.

Step 1 — Create a widget

Go to **Chat → Widgets** and press **Create Widget**.



Step 1. The Widgets page. Each card carries Appearance, Code, Config, Survey, and Edit.

Four fields, two of which matter:

- **Widget Name** — internal, up to 60 characters.

- **Allowed Domains (comma-separated)** — the sites permitted to load this widget, e.g. `example.com, https://www.example.com`. Leave a site out and the widget will not appear there.
- **Workflow (Optional)** — leave as **No Workflow** for now.
- **Knowledge Base (Optional)** — pick the knowledge base you built. **Do pick it.** Without one the AI answers from general knowledge instead of from your business.

Press **Create**.

Step 2 — Install it on your site

On the widget's card press **Code**. The **Widget Configuration** dialog opens with an **Integration Code** section containing a `<script>` block.

Copy that whole block and paste it into your site's HTML just before the closing `</body>` tag. It is one snippet, it loads asynchronously, and it needs no build step.

Reload your site. The launcher appears in the corner.

If it does not appear, the cause is almost always **Allowed Domains** — the domain you are testing on has to be in that list, and `www.example.com` and `example.com` are different entries.

Step 3 — Make it look like your brand

Back on the card, press **Appearance**. This opens the customizer with a live preview beside the controls.

The groups you will actually use on day one:

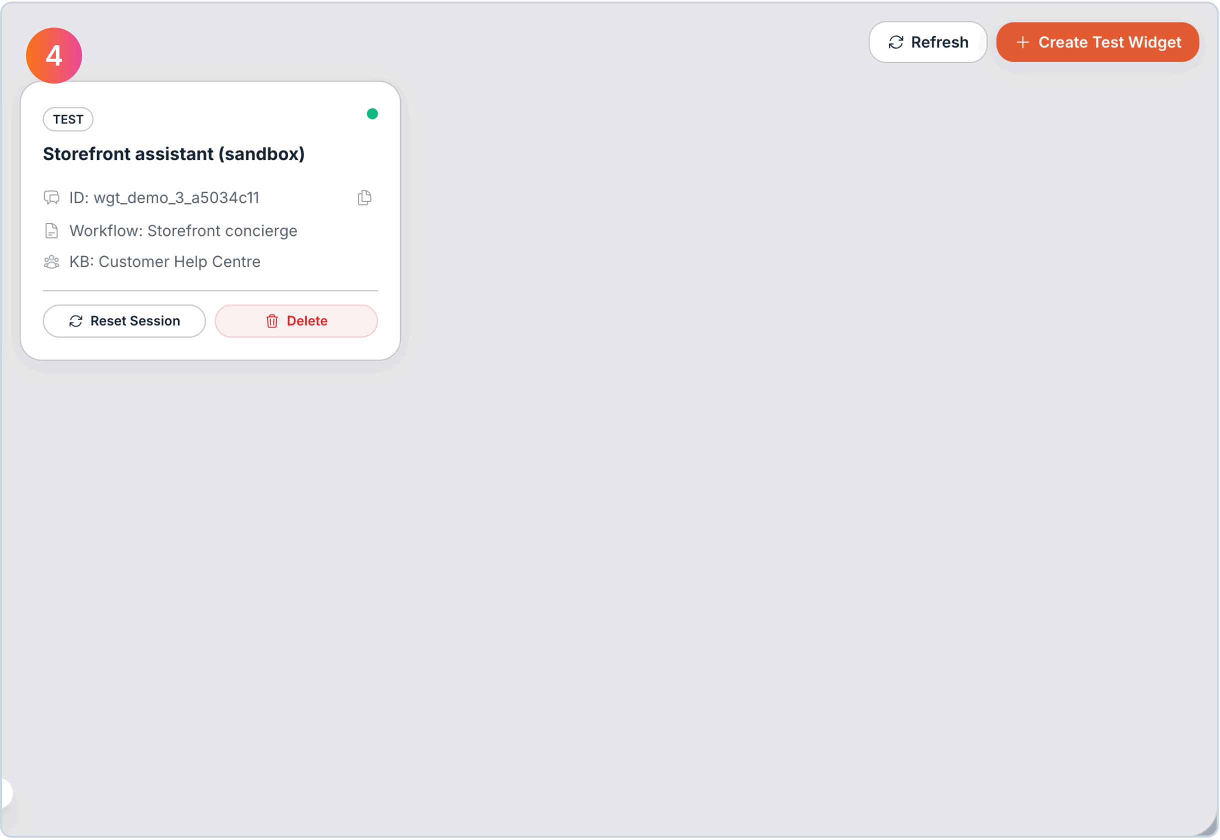
- **Themes** — start from a preset rather than a blank slate.
- **Colors** — **Primary Color**, **Secondary Color**, **Message Text Color**.
- **Shape & Layout** — **Border Radius**, **Widget Position** (any of the four corners), **Theme Mode** (light, dark, or auto).
- **Logo** — upload a file or point at a URL.
- **Widget Text** — **Title**, **Subtitle**, **Welcome Message**, **Greeting Text**, **Placeholder Text**.
- **Floating Button** — the launcher itself: style, animation, colours, and greeting.

There is also **Custom CSS** if you need to go further, using `.chatflow-*` selectors.

Two save buttons, and the difference matters. **Save** stores your work. **Publish** pushes it to the live widget your visitors see. You can save as often as you like without changing anything publicly.

Step 4 — Test changes safely

Before you change a widget that real customers are using, clone it. Go to **Chat → Test Widgets** and press **Create Test Widget**.



Step 4. Test Widgets. A sandbox clone of a live widget, so experiments never touch real traffic.

Pick a **Source Widget**, then choose what to bring across under **Include in Test Widget**:

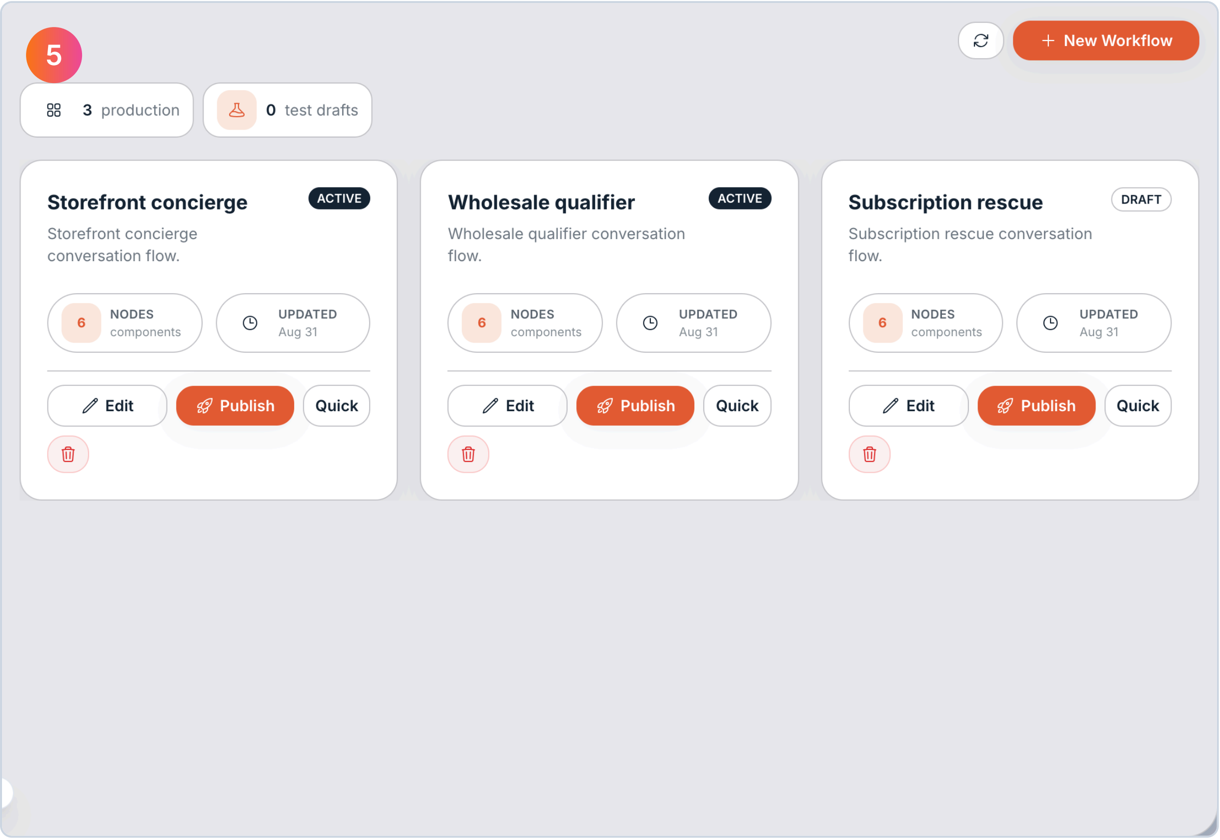
- **Workflow** — clones the workflow into a separate test copy.
- **Knowledge Base** — references the same knowledge base.
- **Prompt Overrides** — copies prompt override settings.
- **Appearance** — copies theme, colours, and styling.

Test widgets are marked with a **TEST** pill and have a **Reset Session** button so you can start a conversation over from scratch.

Step 5 — Add a workflow when the AI needs to follow a script

A widget with a knowledge base answers questions well. A **workflow** is for when the conversation has to *do* something in a defined order — qualify a lead, collect a booking, look up an order, escalate to a person.

Go to **Chat → Workflows** and press **New Workflow**.



Step 5. The Workflows list. Production workflows and their test drafts.

You get two choices:

- **Start from Scratch** — a blank canvas.
- **Choose a Template** — pre-built flows including **Customer Support**, **Lead Qualification**, **Product Recommendation**, **FAQ Bot**, **Order Tracking**, **Feedback Collection**, **Newsletter Signup**, **Technical Support**, **Product Inquiry**, **User Onboarding**, **Welcome & Routing**, and **Out of Office**.

Start from a template. It is far easier to delete nodes than to invent a flow.

In the builder you drag nodes from the **Components** panel and connect them. The ones you need first are **Start**, **Message**, **Button Message**, **Condition**, **LLM Process**, **Human Handoff**, and **End**. Tick **Show Advanced Components** for the rest.

When it works, press **Save**, then **Publish**, then **Activate**. Finally go back to your widget's **Edit** dialog and set **Workflow** to the one you just published.

Where to go next

- Every field in the customizer, every node type, and the test-draft promotion flow: Chat manual.
- Grounding answers in your own content: Knowledge.
- When the AI hands a conversation to a person: Support.
- Per-widget performance: **Dashboard → Widget Analytics**.

> Chat supports 50+ languages. That is a different figure from the 16 voice languages in AI Calls — the two are not the same list.

QUICK START · SECTION 7

Knowledge

Feed your agents your own content so answers come from your business, not guesswork.

Dashboard sidebar: Knowledge

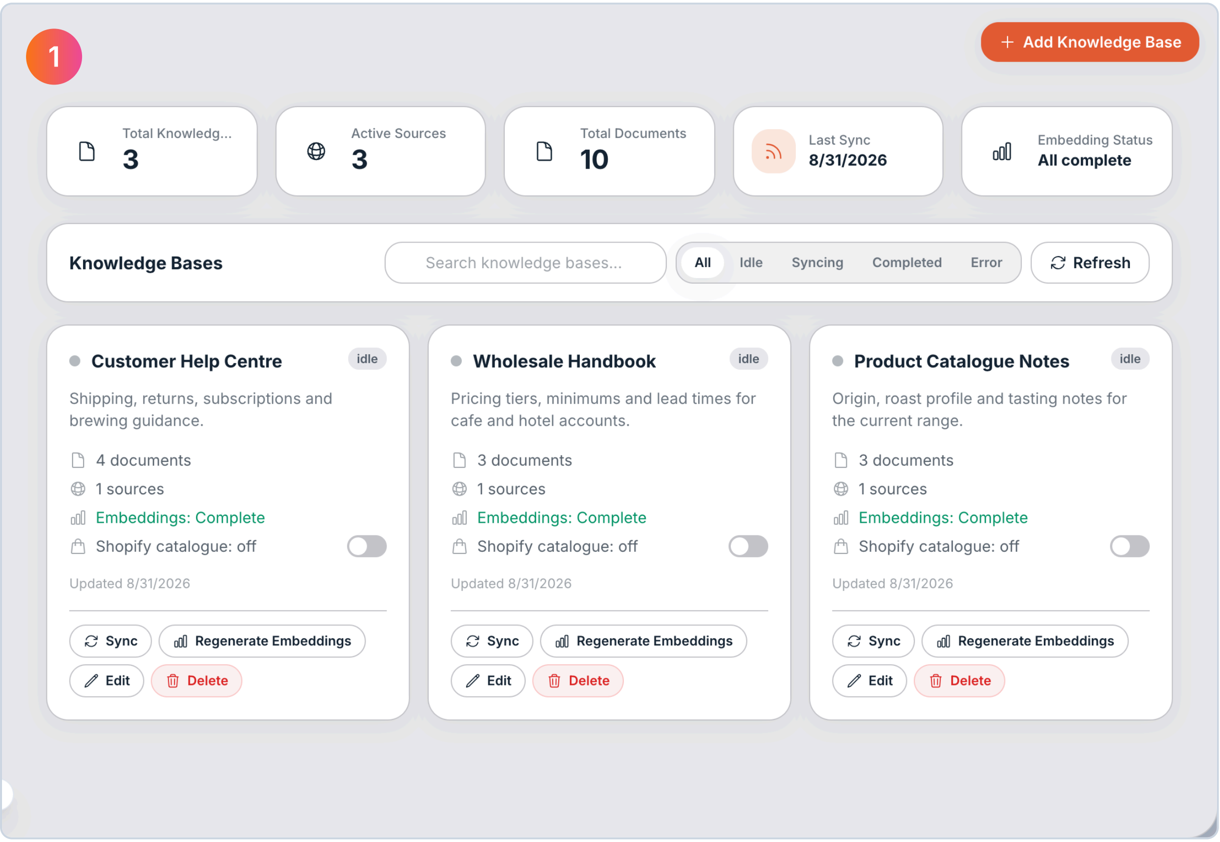
Who can see this: Hidden from agents and supervisors.

Knowledge is what makes your AI answer from your business instead of guessing. Every chat widget and call agent can be attached to a knowledge base, and answers come back with inline citations. The sidebar section is **Knowledge**, and its pages are **Overview**, **Documents**, **Sources**, **Web Crawler**, and **Settings**.

This is the highest-leverage section in the product. An hour spent here beats a day spent editing prompts. It is hidden from agents and supervisors.

Step 1 — Create a knowledge base

Press **Add Knowledge Base** in the top right, give it a **Name** and a **Description**, then **Create**.



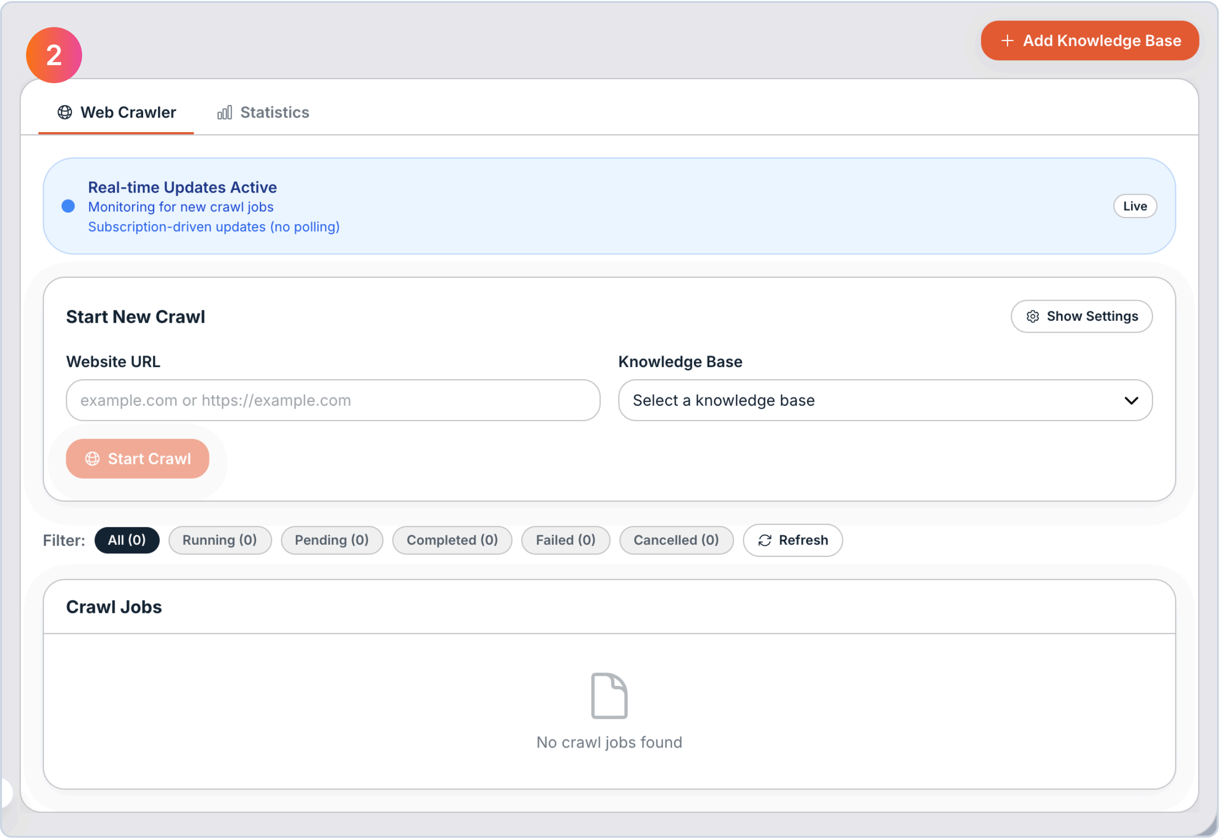
Step 1. Knowledge → Overview. One card per knowledge base, with its embedding state.

Most workspaces need only one. Create several when you have genuinely separate domains — different brands, or a public FAQ versus internal procedures — because a widget attaches to exactly one.

The **Overview** tiles summarise everything: **Total Knowledge Bases**, **Active Sources**, **Total Documents**, **Last Sync**, and **Embedding Status**.

Step 2 — Crawl your website

Go to **Knowledge → Web Crawler**. Under **Start New Crawl**, enter a **Website URL** (`example.com` or the full address), pick your **Knowledge Base**, and press **Start Crawl**.



Step 2. Web Crawler. Jobs report live progress as pages are processed.

Show Settings exposes the controls, which are already set sensibly:

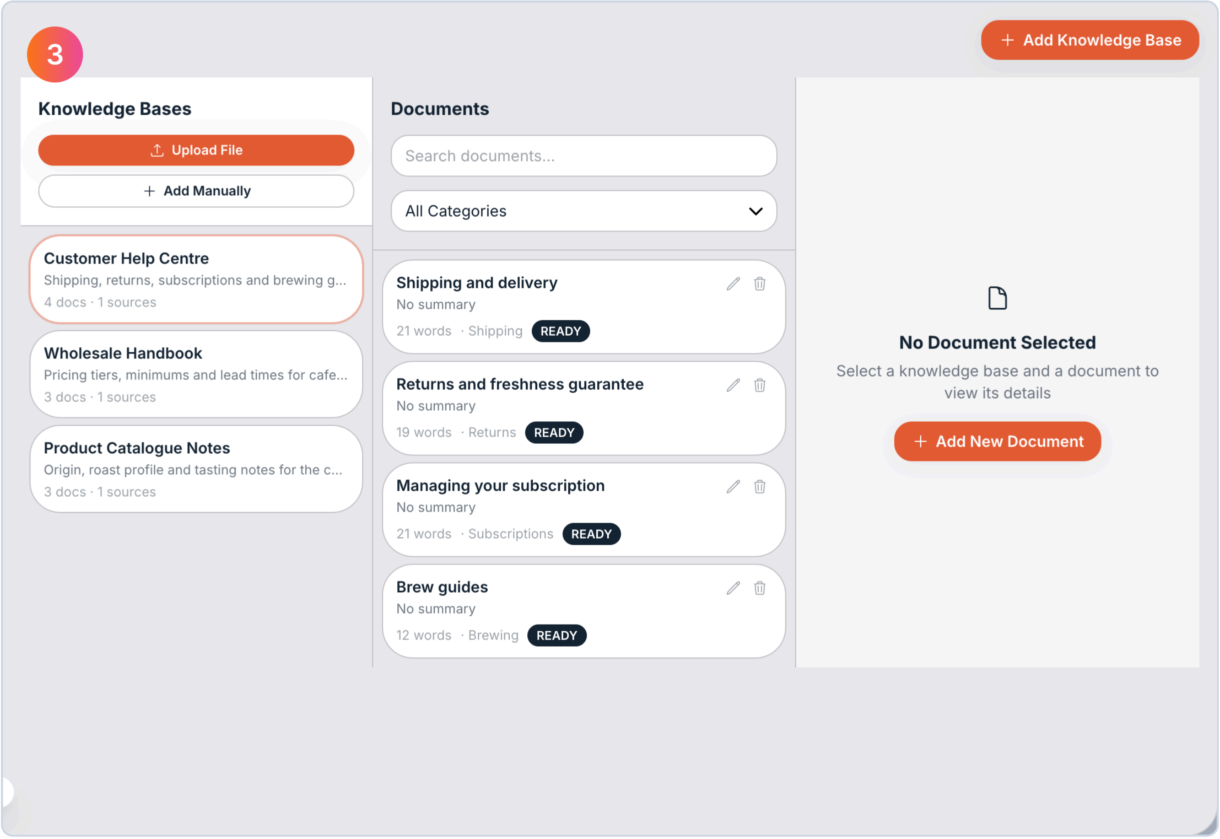
Setting	Default	Range
Max Depth	5	1–10
Max Pages	100	1–1000
Delay (ms)	1000	0–10000
Chunk Size	1000	100–5000
Respect robots.txt	on	
Follow external links	off	

Jobs appear below with live progress — pages found, pages processed, and a percentage — and can be filtered by **running**, **pending**, **completed**, **failed**, or **cancelled**. A running job can be **Stop**ped; a finished one can be deleted.

One important limitation: **the crawler skips PDFs, Word files, and other documents linked from your pages.** It reads HTML. Anything in a file has to be uploaded in the next step.

Step 3 — Upload the documents that are not on your website

Knowledge → Documents. Pick your knowledge base on the left, then **Upload File**.



Step 3. Documents. Knowledge bases, their documents, and the selected document's content.

Supported files are **PDF**, **Word (.docx)**, and plain-text formats such as `.txt`, `.md`, and `.csv`.

Anything else is read as raw text, which usually produces gibberish or an empty document **without reporting an error** — so check the document after uploading. Legacy `.doc` files are the common casualty; resave them as `.docx`.

This is usually where the answers your customers actually want live: price lists, policies, warranty terms, delivery rules. **Add Manually** is there for writing an answer directly, which is the fastest fix when you spot a gap.

Step 4 — Generate embeddings

Back on **Knowledge → Overview**, each card shows **Embeddings:** followed by its state. Press the button beside it.

State	Button	Meaning
No Documents	**Generate Embeddings**	Nothing to embed yet
Not Generated	**Generate Embeddings**	Content exists but has never been embedded
Needs Update	**Update Embeddings**	Documents changed since the last run
Complete	**Regenerate Embeddings**	Up to date

Content is not searchable until this finishes. A knowledge base full of documents with no embeddings answers nothing — this is the single most common reason a widget "ignores" content that is plainly there.

Watch for **Needs Update** afterwards. Every time you add or edit a document, the card flips to that state and you need to run it again.

Step 5 — Attach it, then test it

Attach the knowledge base to a widget when you create or edit it — see Chat for chat widgets and AI Calls for voice.

Then ask your widget a question only your documents can answer.

If the answer is vague, **add content — do not rewrite the prompt.** A missing fact cannot be prompted into existence, and the fastest fix is almost always a short manual document that states the answer plainly.

Keeping it current

Two mechanisms, and they are different:

Sources (**Knowledge → Sources**) are recurring feeds. **Add Source** takes a **Type** (**Website**, **Sitemap**, **RSS Feed**, **API Endpoint**), a **Name**, a **URL**, and a **Sync Frequency** of **Manual**, **Daily**, **Weekly**, or **Monthly**. Use these for content that changes.

Settings (**Knowledge → Settings**) holds per-knowledge-base retrieval options: **Chunk Size**, **Chunk Overlap**, **Language**, and **Auto-update sources and embeddings**. Leave **Auto-update** on and the maintenance mostly takes care of itself.

Where to go next

- Every field, limit, status, and the retrieval settings explained: Knowledge manual
- Chat — attach the knowledge base to a widget
- AI Calls — attach it to a voice agent
- FloGPT for Shopify — embed your product catalogue

> If you sell on Shopify, each knowledge base card has a **Shopify catalogue** toggle. Switch it on and your products are embedded too, so the AI can answer about stock and specifications. It needs a connected Shopify store — see Integrations.

QUICK START · SECTION 8

Support

The human side: live chat inbox, tickets, contacts, call takeover, CRM analytics, and the Users section's team management.

Dashboard sidebar: Support

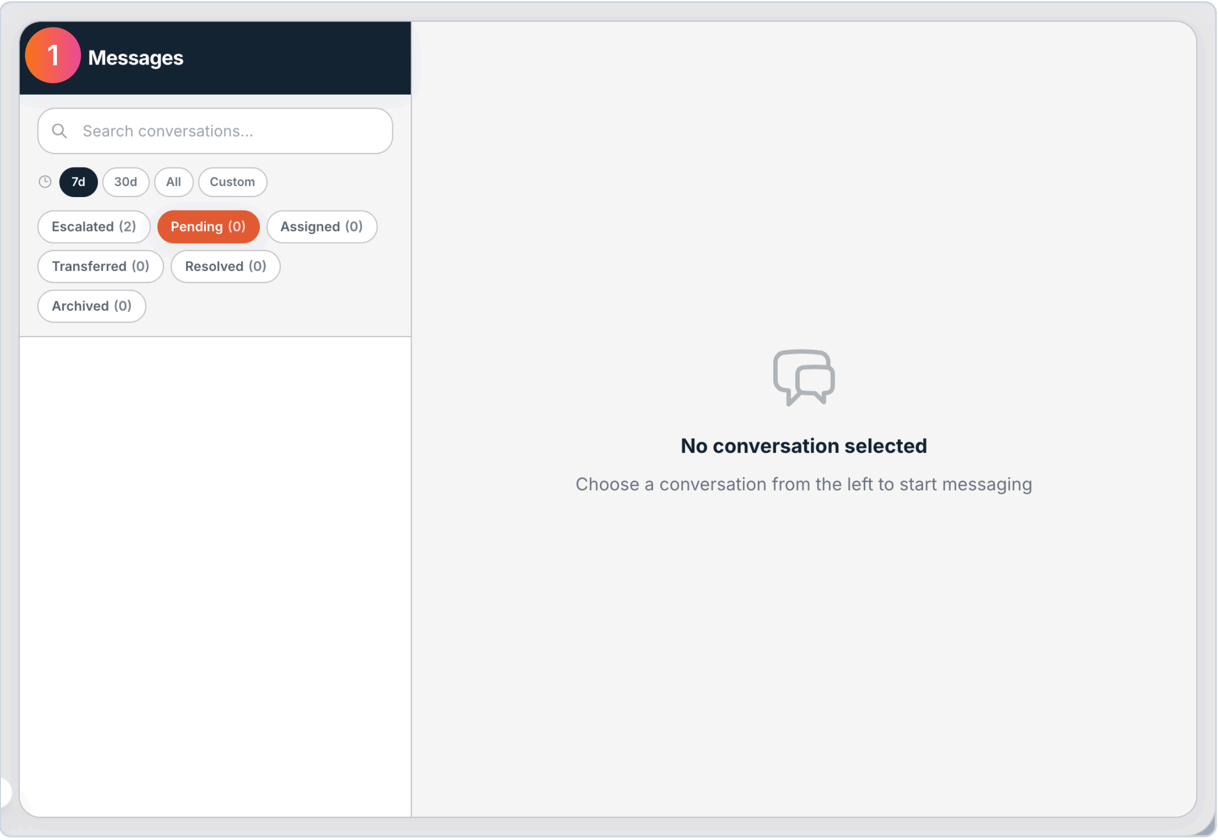
Who can see this: Support is visible to every role, with the analytics and settings entries owner or admin only. The Users pages it documents sit in their own owner-and-admin section, and Permissions within it is owner-only.

Support is the human side of the product: the live chat inbox where the AI hands conversations over, tickets, contacts, taking over an AI phone call, and your team. The sidebar section is **Support**.

Every role sees this section, but the pages differ. **Support Chat**, **Live Calls**, **Tickets**, **Contacts**, and **My Analytics** are open to everyone; **Settings** and the team-wide analytics are owner or admin. The people themselves are managed in the separate **Users** section, which only owners and admins see.

Step 1 — Watch the inbox

Support → Support Chat is where a conversation lands when the AI cannot finish it.



Step 1. Support Chat. Status filters across the top carry live counts.

The left panel lists conversations, filtered by **Escalated**, **Pending**, **Assigned**, **Transferred**, **Resolved**, and **Archived** — each with a live count — plus a date filter (**7d**, **30d**, **All**, **Custom**) and a search box.

Conversations arrive here on their own. When a visitor asks for a person, or a workflow hits a **Human Handoff** node, the conversation is flagged and appears under **Pending**.

If nobody is on shift, the visitor is told so and their request **stays pending** until someone picks it up. It is not lost. Which hours count as "on shift" is set by **Business Hours** in Setup.

Step 2 — Claim a conversation and reply

Press **Assign me** on a row to take it, then reply in the composer at the bottom — *Press Enter to send, Shift+Enter for a new line*.

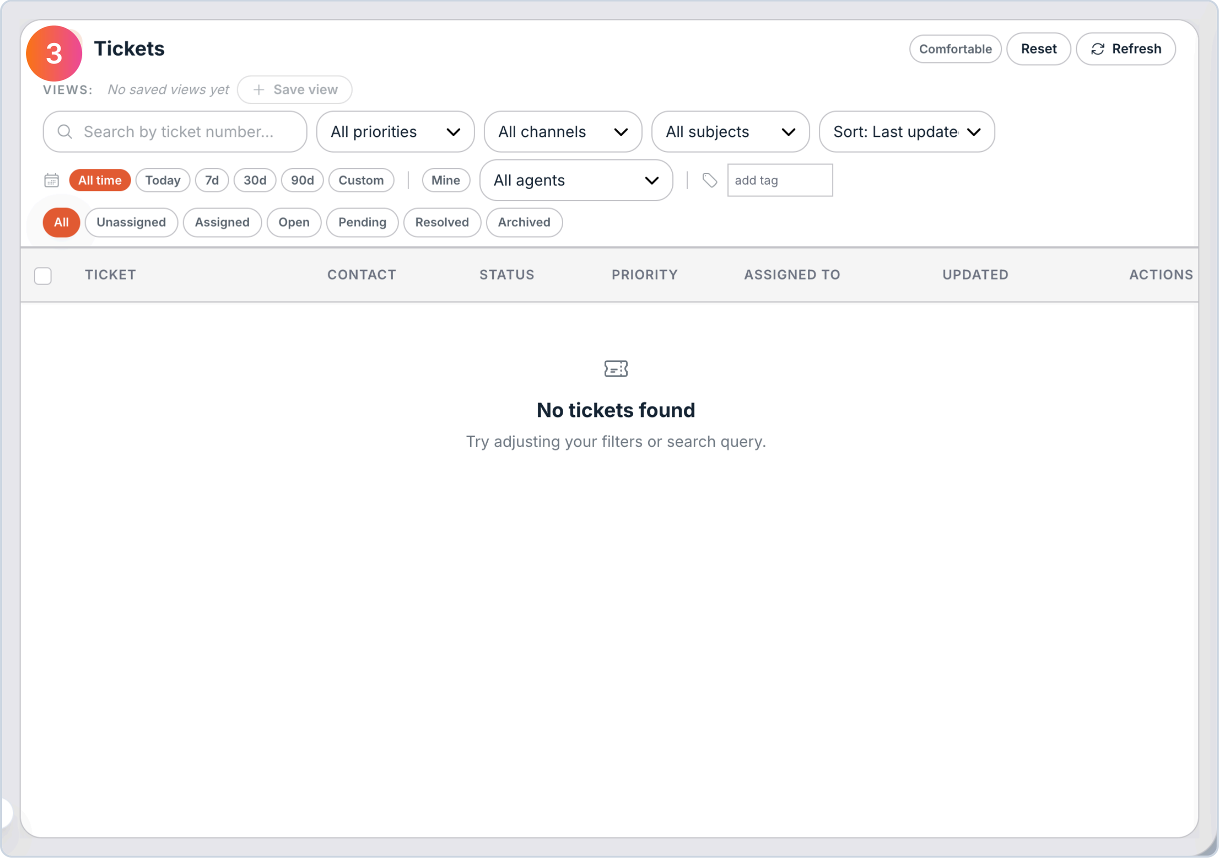
You get the full history above your reply, including everything the AI said, separated by a **Support Handoff** marker so you can see exactly where the human part starts. Read the AI's last few turns before typing; the customer has usually already explained themselves once.

Other things you can do from here:

- **Transfer Conversation** — hand it to another agent or supervisor, chosen from a searchable list grouped into **Agents** and **Supervisors**.
- **Create CRM Ticket** — files a ticket linked to this chat, picking up the visitor as a contact.
- **Resolve** — closes it, with optional resolution remarks.

Step 3 — Work your tickets

Support → Tickets is the queue. Every ticket has a number like `ACME-000042`, unique to your organization.



Step 3. Tickets, filtered by status pill.

Filter by status (**Unassigned**, **Assigned**, **Open**, **Pending**, **Resolved**, **Archived**), priority, channel, and subject, then press **Manage** on a row to open it.

The drawer has tabs for **Overview**, **Conversation**, **Notes & Activity**, **Contact**, and **Internal**. On **Overview** you move the ticket along:

Current status	Available move
Assigned	**Open ticket**
Open	**Resolve** or **Put on hold**
Pending	**Resume**
Resolved	**Close ticket**

If you are an agent, you can only edit tickets assigned to you — assign it to yourself first with **Self assign**.

Step 4 — Reply to a customer from the ticket

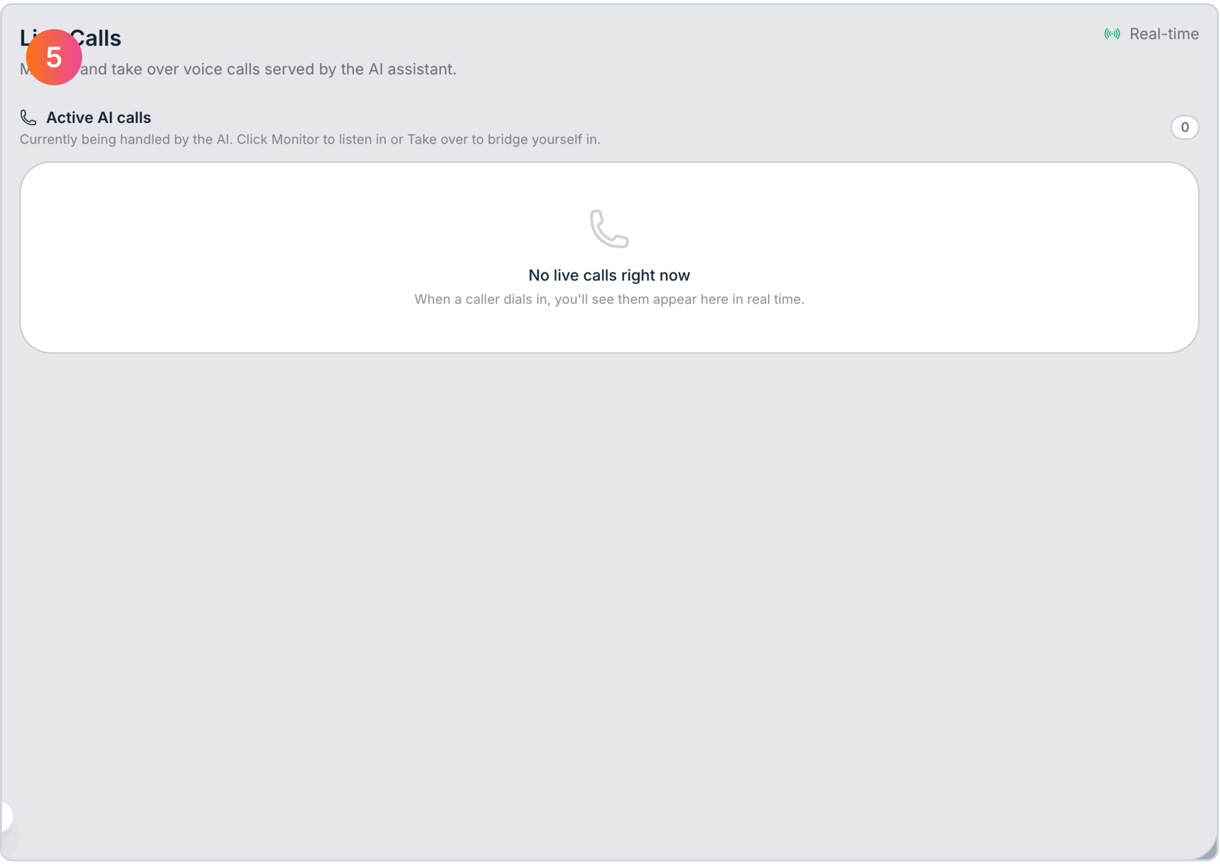
On **Notes & Activity** the composer has three modes:

- **Internal note** — teammates only. Supports **@ Mention**.
- **Reply to customer** — sends over **Email**, **SMS**, **WhatsApp**, **Instagram**, or **Facebook**, depending on what the contact has on file.
- **Request files** — sends the customer a one-time secure upload link, valid 14 days, that attaches straight back to the ticket.

Request files is the one people miss. It is far more reliable than asking a customer to email an attachment.

Step 5 — Take over a live AI phone call

Support → Live Calls shows calls in progress — *Monitor and take over voice calls served by the AI assistant.*



Step 5. Live Calls. Ringing callers at the top, active AI calls below.

Two groups: **Ringing now** — *Caller waiting for a human agent. First click wins* — and **Active AI calls**.

Opening a call lets you listen in with a live transcript, sentiment, and a running summary. From there:

- **Pick up** a ringing caller, or **Take over** an AI call to bridge your own microphone in.
- **Release** to hand control back to the AI.
- **Hang up** / **End call** to finish it.

Take over rather than start a fresh call: the caller stays on the line and you keep the context.

Step 6 — Track how you are doing

Support → My Analytics shows your own ticket throughput — **Total tickets**, **Open**, **Resolved**, **Closed**, **Avg resolution**, and **First response** — over a range you choose (default 30 days).

Owners and supervisors also get **Agent Analytics** for a chosen person, and owners get **Supervisor Analytics** with an org-wide **Agent leaderboard**.

For owners: three things to set up once

Support → Settings decides which channels create tickets at all. Each of **Email**, **SMS**, **WhatsApp**, **Instagram**, **Facebook**, **Live Chat**, and **Voice Calls** can be paused or given a default priority. A channel shows **Not connected** until you wire up the provider in Integrations.

Users → Agents (and **Supervisors**, **Admins**) is where people come from. **Invite {Role}** emails an invitation; **Create {Role}** provisions someone with a password who can sign in immediately, with no email sent. These three pages used to sit in Support; they are now their own **Users** section, visible to owners and admins, because the roles they hand out apply across the whole product rather than just this inbox.

Users → Permissions narrows what a role may do. The grid lists capabilities down the side and **Admins**, **Supervisors**, and **Agents** across the top; untick a box to take that capability away, and each column saves on its own.

It can **only take access away** — a capability a role never had is greyed out and cannot be granted, so a workspace that never opens the page behaves exactly as it always has. Only the owner can change it; an admin who opens it sees the grid read-only. The one revocation worth making deliberately on day one is *View the plan and payment methods*, which every role holds by default because the sidebar hid **Subscription** from agents and supervisors while the URL never did.

Where to go next

- Every field, status, permission, and channel rule: Support manual, including the full capability grid
- Chat — add the **Human Handoff** node that feeds this inbox
- Setup — business hours and escalation timings
- Integrations — connect the channels tickets arrive on

> **Managed Support** is a different thing from the rest of this section: it is trained human agents and supervisors that FloGPT hires and staffs for you, billed monthly. If you want to outsource the work rather than do it, start there.

QUICK START · SECTION 9

Data

Capture structured data from conversations, take bookings, and read the visitor analytics behind both.

Dashboard sidebar: Data

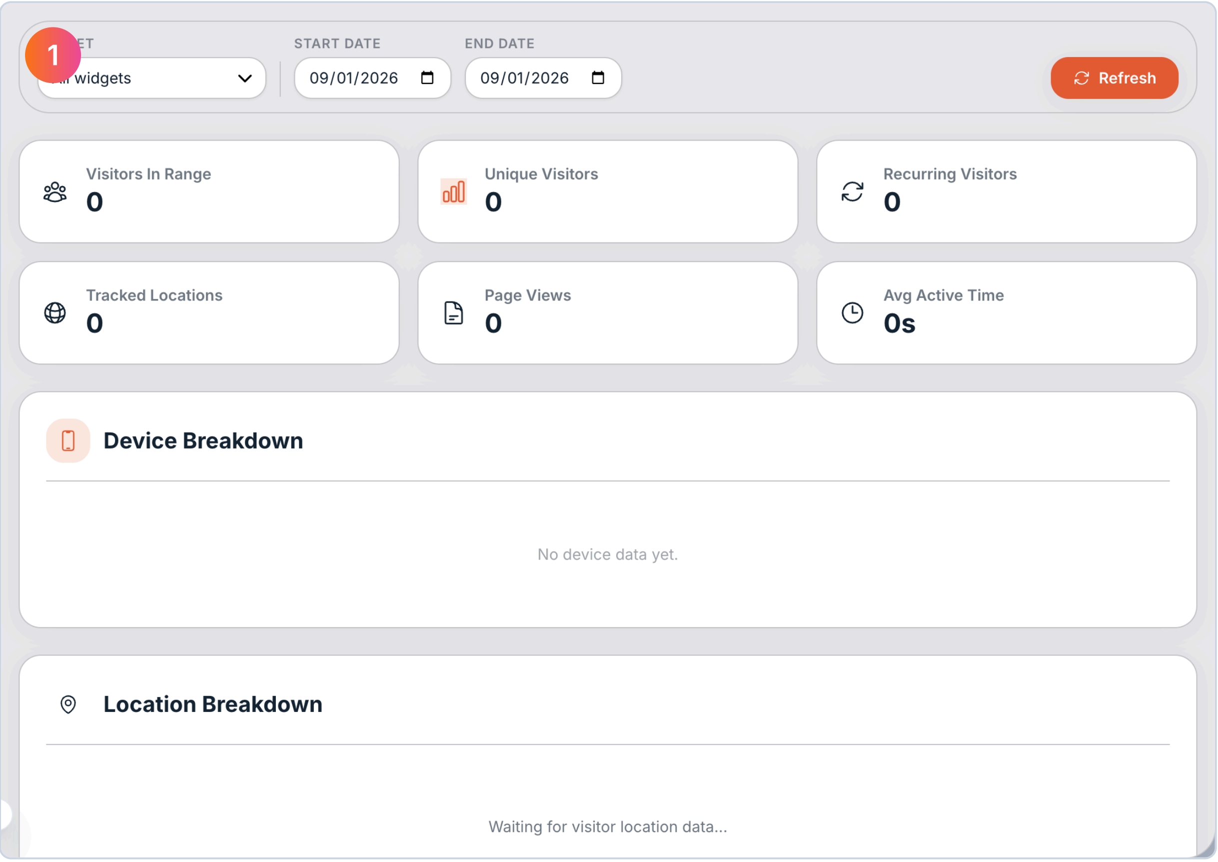
Who can see this: Hidden from agents and supervisors.

Data is what your conversations leave behind: what your AI captured and when people booked. The sidebar section is **Data**, and its pages are **Data Collections** and **Calendars**. The **Visitor Dashboard** sits under **Dashboard** with the rest of the analytics, but it is covered here because it reports on the same conversations.

The section is hidden from agents and supervisors.

Step 1 — See who is visiting

Dashboard → Visitor Dashboard reports on visitors to the sites carrying your chat widget.



Step 1. Visitor Dashboard. Filter by widget and date, then read the tiles.

Pick a **Widget** (or **All widgets**) and a **Start Date** and **End Date** — the range defaults to the first of the current month through today.

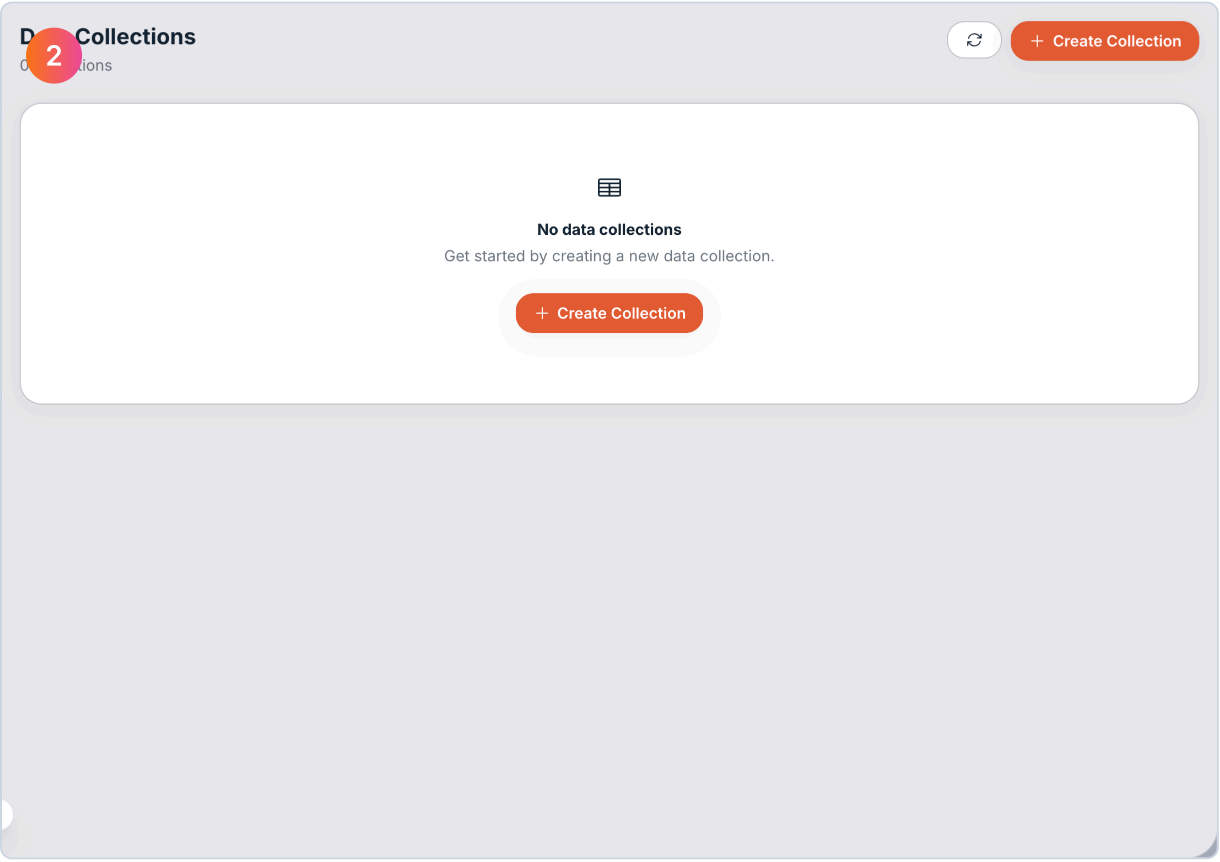
The tiles: **Visitors In Range**, **Unique Visitors**, **Recurring Visitors**, **Tracked Locations**, **Page Views**, and **Avg Active Time**.

Below them, **Device Breakdown**, **Location Breakdown** (expandable from region down to city), and a **Page Details** table showing which pages drew visits, page views, unique and recurring visitors, average active time, and an engagement score.

Two things to know: a visitor is identified **per widget**, so the same person on two of your widgets counts twice. And the page is not live — press **Refresh** to update it.

Step 2 — Create a data collection

Data → Data Collections is a set of structured tables. This is where the AI puts what it learns — a lead's details, a qualification answer, a booking — and it is the same store the Call Centre uses for lead lists.



Step 2. Data Collections. Each card shows row and column counts and its sheet-sync state.

Press **Create Collection**. You get two ways in:

- **Start blank** — define the columns yourself.
- **Upload a file** — drop a `.csv`, `.xlsx`, or `.xls` (up to 7MB) and the schema is detected automatically.

Give it a **Collection Name**, then define **Columns**. Each column has a name, a type — **String**, **Number**, **Date**, **Boolean**, **Email**, **URL**, or **Phone** — and an optional **Required** flag.

Choose types deliberately. **Phone** and **Email** are what let the rest of the product message these people; a phone number stored as **String** will not reliably work for SMS or dialling.

Step 3 — Sync it to a spreadsheet (optional)

Still in the form, open **Spreadsheet Sync** and tick **Enable Synchronization** to keep the collection in step with a Google Sheet or an Excel workbook.

You pick a connected **Google Account** or **Microsoft Account** — connect one first under Integrations → **Sheets** — then a folder and either a new file or an existing one.

The sync is **two-way**: edits in the sheet come back, and column changes here are applied to the sheet. Once linked, the collection is locked to that file to keep the sync honest.

Step 4 — Work with the rows

Open a collection with **View Data →**.

From here you can **Add Entry** by hand, **Upload File** to append more rows, **Manage Columns**, **Export** as CSV or Excel, **Sync from Spreadsheet**, or **Delete All**.

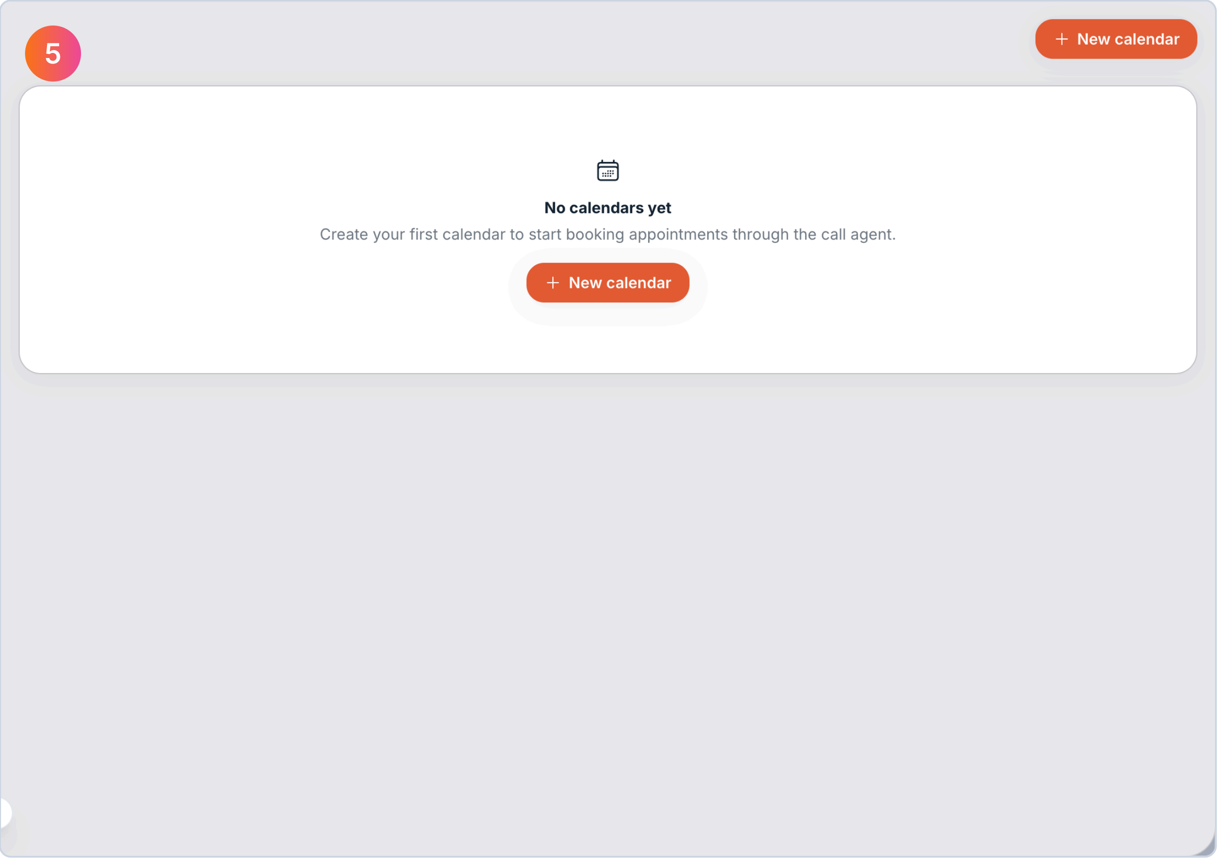
The table supports search, per-column filters, a created-date range, and 10 to 100 rows per page. Rows are editable in place.

If the collection came from Shopify it is **read-only** and refreshes itself every 30 minutes.

If your team works out of the same one or two collections every day, owners and admins can pin them: press the bookmark on a collection's card and it becomes its own entry in the **Data** menu, up to **10** of them. Pins are workspace-wide, so everyone gets the same shortcuts.

Step 5 — Take bookings with a calendar

Data → Calendars turns a data collection into a bookable calendar your AI can fill during a call or a chat.



Step 5. Calendars. Each calendar wraps a data collection of appointments.

Press **New calendar** and set:

- **Name** and an optional **Description**.
- **Timezone** — all availability is interpreted in it.
- **Slot duration (min)** — 5 to 240, default 30.
- **Storage** — leave it on **Auto-create a new Data Collection**, which builds the appointment columns for you.

Then open the calendar and press **Settings** to define availability: **Buffer (min)**, **Capacity per slot**, **Max advance days**, and **Working hours** per day (Monday to Friday, 09:00–17:00 by default).

Book an appointment lets you book manually. Your AI books into the same slots automatically, respecting capacity and working hours.

To mirror it to a real calendar, press **Sync with Google** and pick a connected Google or Microsoft account. If it complains about missing Calendar permission, reconnect that account under Integrations → Sheets so the provider can grant it.

Where to go next

- Every field, limit, column type, and sync rule: Data manual
- Call Centre — the same data collections used as lead lists
- Chat and AI Calls — what writes rows here
- Integrations — connect Google or Microsoft first

> Deleting a calendar keeps its data collection and every appointment row. Only the calendar wrapper goes. Delete the collection separately if you actually want the data gone.

QUICK START · SECTION 10

Integrations

Connect Shopify, your CRM, Google Sheets, Meta, LinkedIn, email, and SMS.

Dashboard sidebar: Integrations

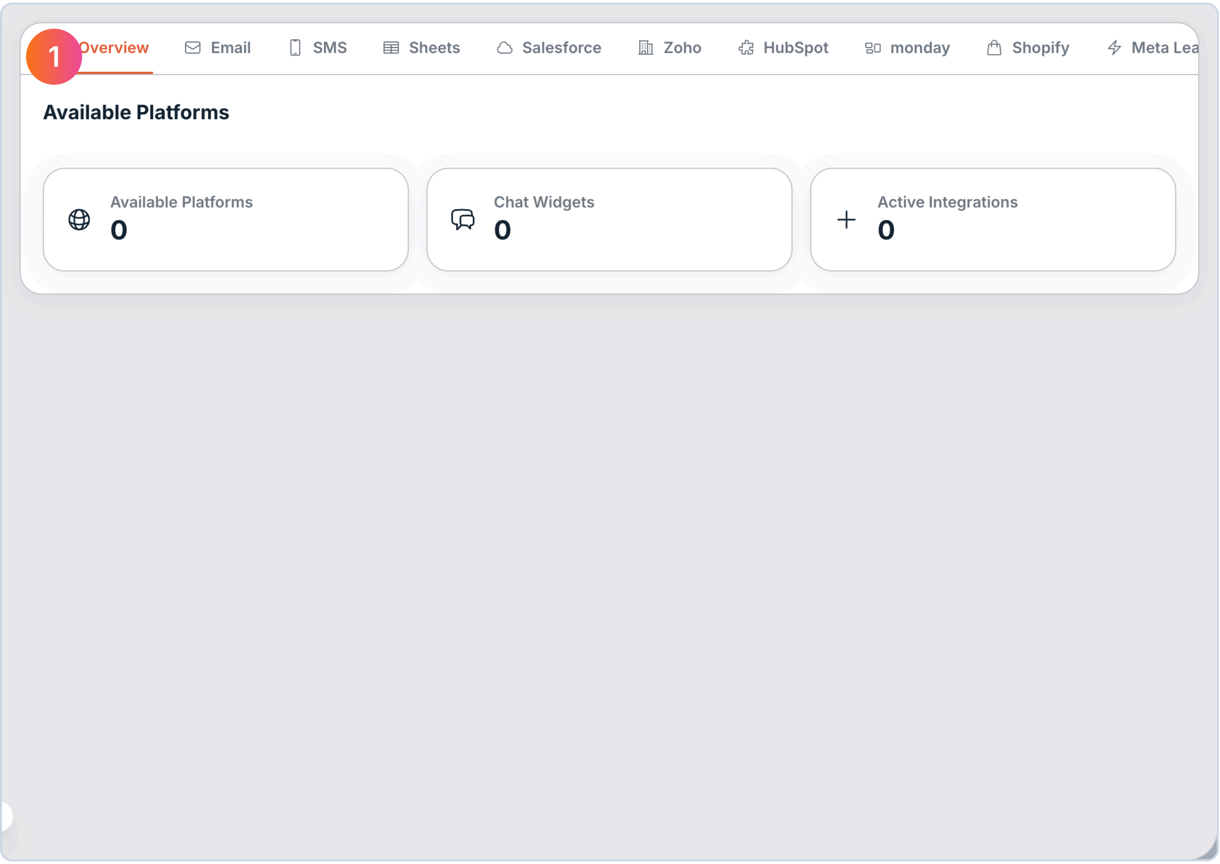
Who can see this: Hidden from agents and supervisors.

Integrations connects FloGPT to the systems you already run: spreadsheets, your CRM, Shopify, Meta, LinkedIn, email, and SMS. The sidebar section is **Integrations**.

It is one tabbed page — **Overview**, **Email**, **SMS**, **Sheets**, **Salesforce**, **Zoho**, **HubSpot**, **monday**, **Shopify**, **Meta Lead Ads**, **Meta Messaging**, and **LinkedIn Lead Gen** — and it is hidden from agents and supervisors.

Step 1 — See what is connected

Integrations → Overview lists **Available Platforms** — WhatsApp Business, Email, Facebook Messenger, Instagram Direct Messages, and SMS — with a **Get Started** button on each, plus tiles for **Available Platforms**, **Chat Widgets**, and **Active Integrations**.

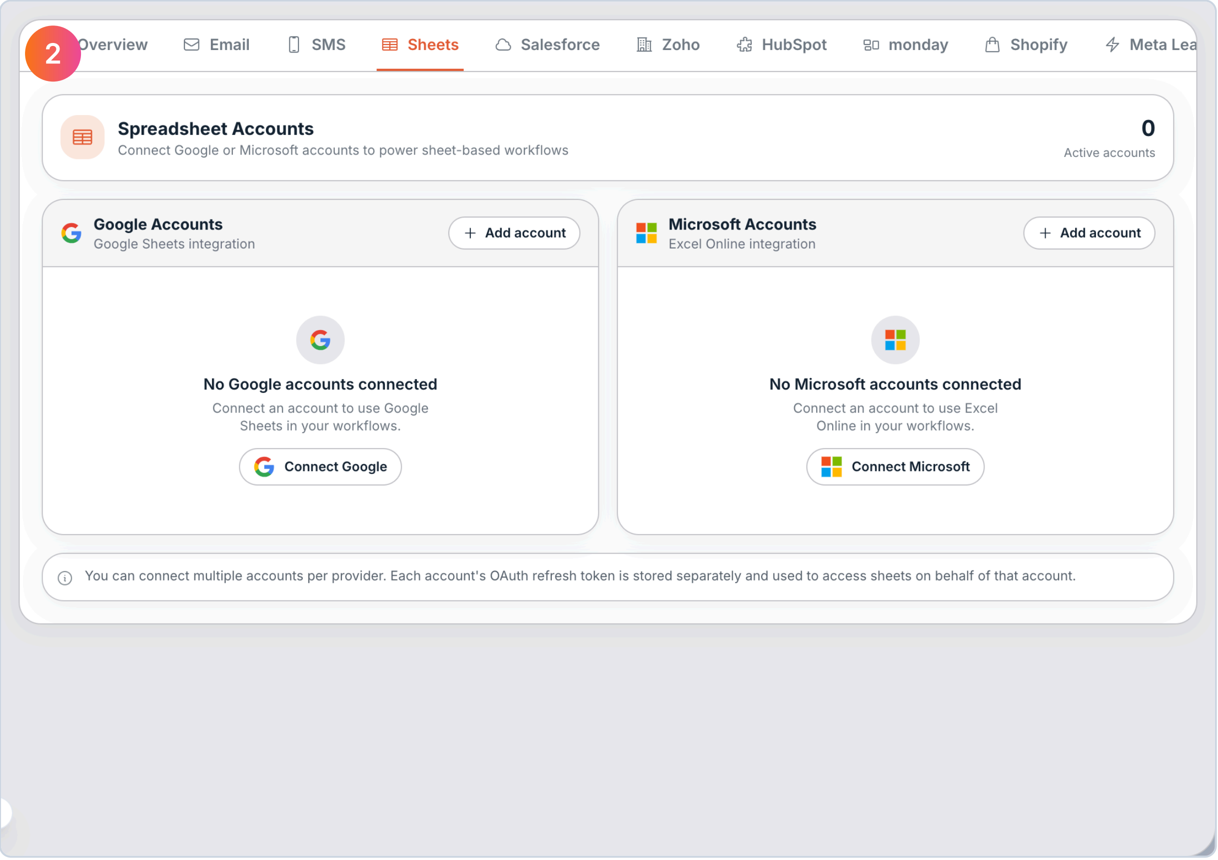


Step 1. Integrations → Overview. Messaging and email platforms with their connection counts.

Overview only covers those five messaging channels. Sheets, the CRMs, Shopify, Meta Lead Ads, and LinkedIn have their own tabs and do not appear here — go straight to the tab you want.

Step 2 — Connect a spreadsheet account

Integrations → Sheets is the one most other features depend on. Google or Microsoft accounts connected here power spreadsheet sync on data collections **and** calendar sync.



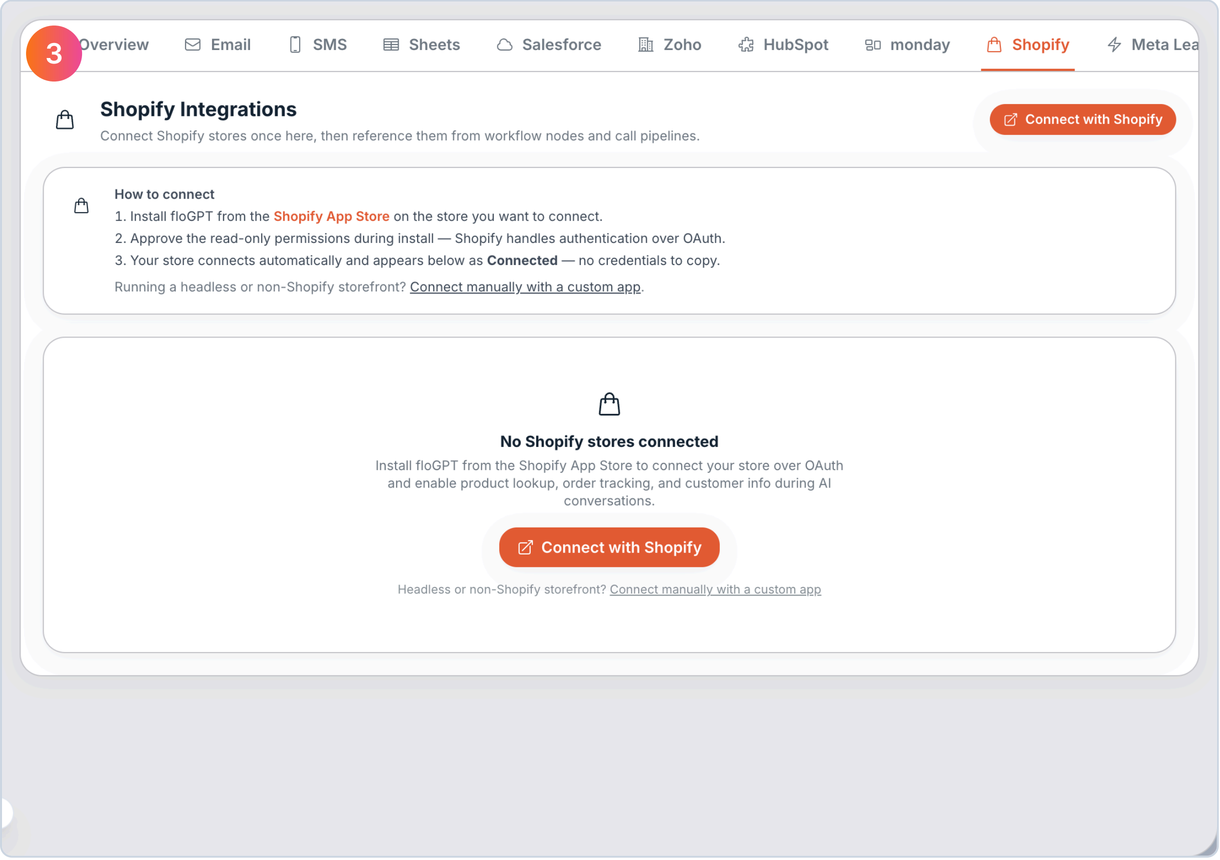
Step 2. Sheets. Connect Google or Microsoft accounts once; several features use them.

Press **Add account** and you are redirected to Google or Microsoft to approve access — there are no credentials to type. You can connect several accounts per provider.

Connect it with calendar access in mind. If you later sync a calendar and it complains about missing Calendar permission, you have to **disconnect and reconnect** the account — the permission cannot be added afterwards.

Step 3 — Connect Shopify, if you sell there

Integrations → Shopify. The normal path is **Connect with Shopify**, which opens the Shopify App Store.



Step 3. Shopify. Install from the App Store; the store connects over OAuth.

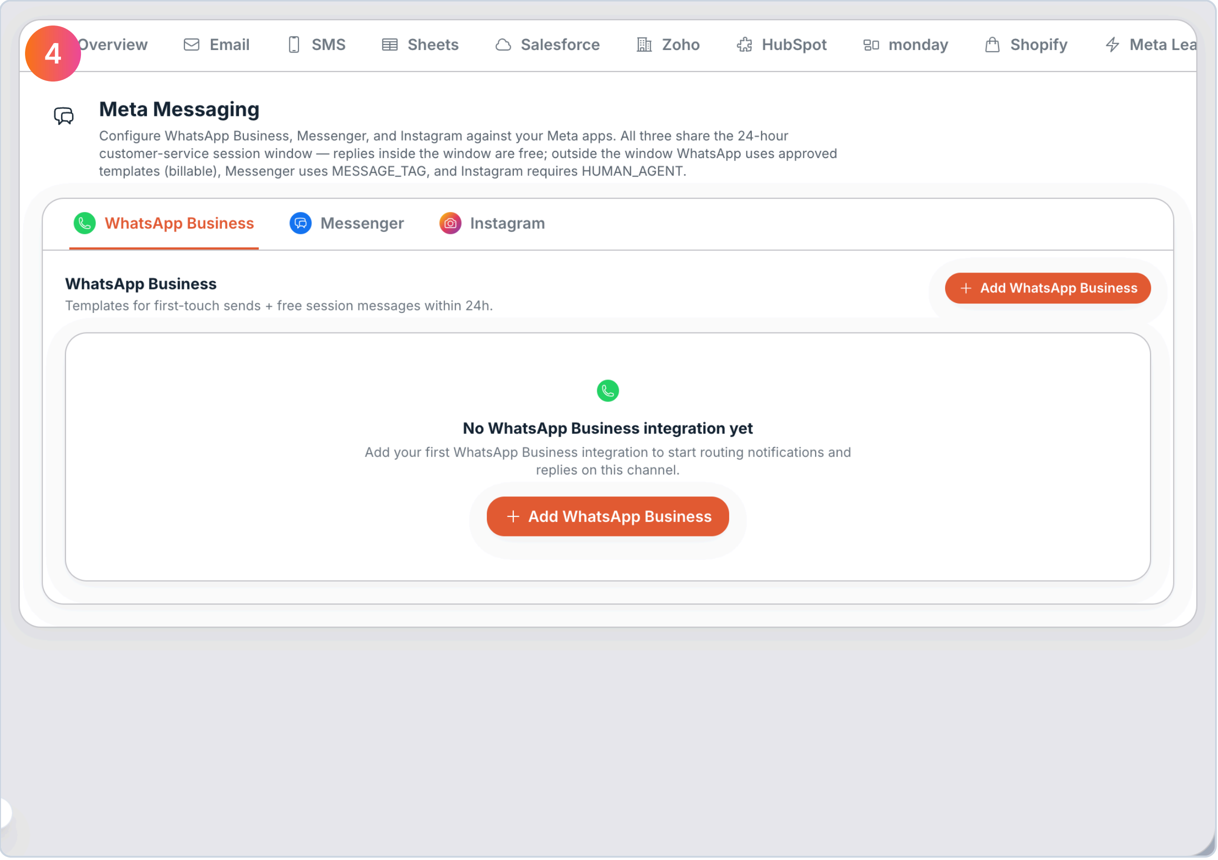
Install FloGPT from there, approve the read-only permissions, and the store appears as **Connected** automatically — no credentials to copy. Connected stores show their **API Version**, **Granted scopes**, and **Available actions**.

There is a manual custom-app path for headless storefronts, but it is genuinely advanced and most merchants should not use it.

Full detail: FloGPT for Shopify.

Step 4 — Connect a messaging channel

Integrations → Meta Messaging covers **WhatsApp Business**, **Messenger**, and **Instagram**. All three share Meta's 24-hour customer-service window: replies within 24 hours of the customer's last message are free, and outside it each channel has its own rules.



Step 4. Meta Messaging. WhatsApp, Messenger, and Instagram on one tab.

For WhatsApp you supply a **Phone Number ID**, an **Access Token**, and a **Verify Token** you invent, then paste the **Webhook URL** and that same verify token into your Meta App Dashboard. Choose your channels:

- **Outbound — notifications** — *Order updates, alerts and template sends*
- **Inbound — replies** — *AI answers customer messages via a chat widget*, which needs a **Reply Chat Widget**

Add your **Business Account ID (WABA ID)** as well. Without it you cannot sync message templates, and templates are what let you message someone outside the 24-hour window at all.

Messenger and Instagram follow the same shape with a Page ID or Instagram Business Account ID.

Step 5 — Connect your CRM

Salesforce, **Zoho**, **HubSpot**, and **monday** all connect over OAuth — press **Add {provider} account** and approve.

Then set the per-account sync options:

- **Auto-sync** — mirror new records automatically.

- **Sync new tickets** and **Sync new contacts**.
- **Mirror status & priority changes** and **Mirror private notes as comments**.
- **Default company** — falls back to the contact's email domain.

What each becomes on the far side differs: Salesforce creates **Leads**, Zoho can create a **Ticket (Zoho Desk)** or a **Lead (Zoho CRM)**, HubSpot a **Ticket (Service Hub)** or **Contact only**, and monday a **board item** — which is why monday also asks for a **Ticket board id** and **Contact board id**.

Step 6 — Turn on email and SMS

Integrations → Email takes SMTP and IMAP credentials. Pick a **Direction**:

- **Outbound (SMTP)** — *Send from workflows / replies*
- **Inbound (IMAP)** — *Auto-create tickets from mail*
- **Both** — one mailbox, both directions

Quick Setup buttons prefill **Gmail**, **Outlook**, **Yahoo**, or **Amazon SES**. For Gmail use an App Password, not your account password. Press **Test Connection** before relying on it.

Integrations → SMS is simpler than it looks: buy a Telnyx number under **Calls → Phone Numbers** first, then come back and pick it as your **From Number**. There is no API key to paste — *The platform key authenticates send + receive — no API key required here.*

Where to go next

- Every field, credential, scope, and sync direction: Integrations manual
- Support → Settings — decide which of these channels create tickets
- Data — spreadsheet sync and calendars that use the Sheets accounts
- FloGPT for Shopify

> **LinkedIn Lead Gen** needs approval from LinkedIn's Marketing Developer Platform for the Lead Sync and Advertising APIs before you can connect anything. That approval takes weeks, so start it early if you want it.

QUICK START · SECTION 11

Setup

Profile, organization policies, security, API keys, billing, usage, and referrals.

Dashboard sidebar: Setup

Who can see this: Always visible; Organization, Reports, and Escalation are owner-only, and API keys and billing are owner or admin.

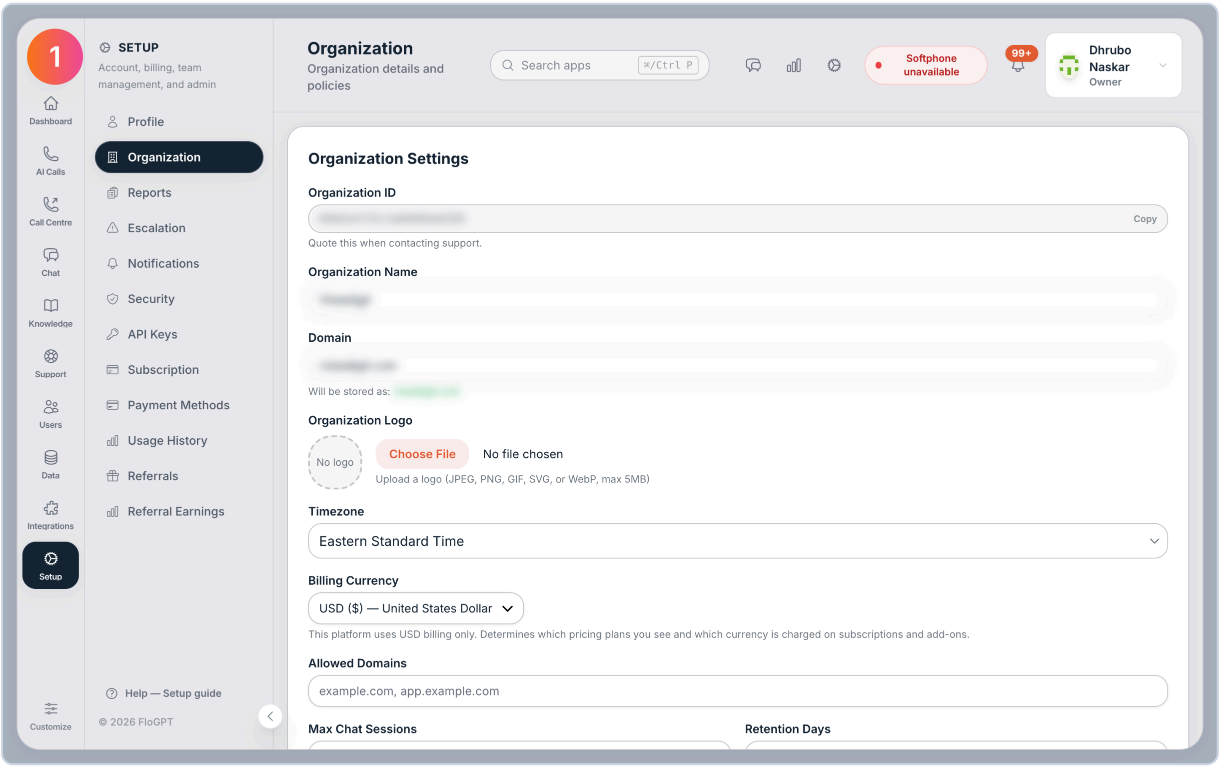
Setup is the settings section: your own profile, organization-wide policies, security, API keys, billing, and referrals. The sidebar section is **Setup**.

It is always visible, but most of it is not. **Organization**, **Reports**, and **Escalation** are **owner-only**; **API Keys** is owner or admin; billing and referrals are hidden from agents and supervisors. **Profile**, **Notifications**, and **Security** are open to everyone.

If you are setting up a brand-new workspace, do the Start here guide instead — it walks the same screens in the order that matters.

Step 1 — Set your timezone and retention

Setup → Organization, owner only. This is the most consequential screen in the section.



Step 1. Setup → Organization. Timezone here drives report scheduling and the Call Centre analytics.

Three fields deserve real thought:

- **Timezone** — sets your organization's local day. Scheduled reports fire against it, and the Call Centre analytics count their days by it. Get this wrong and every report arrives at the wrong hour.
- **Retention Days** — how long transcripts are kept, up to **90**. Setting `0` means no retention limit is applied.
- **Max Chat Sessions** — a cap on concurrent chat sessions, up to `10000`.

Also here: **Organization Name**, **Domain**, **Organization Logo** (JPEG, PNG, GIF, SVG, or WebP, max 5MB), **Allowed Domains**, **Enable Analytics**, and your **Organization ID** with a copy button — quote that when you contact support.

Press **Update Organization** when you are done.

Step 2 — Turn on PII redaction if you handle sensitive data

Still on the Organization page, find **Transcript PII Redaction**.

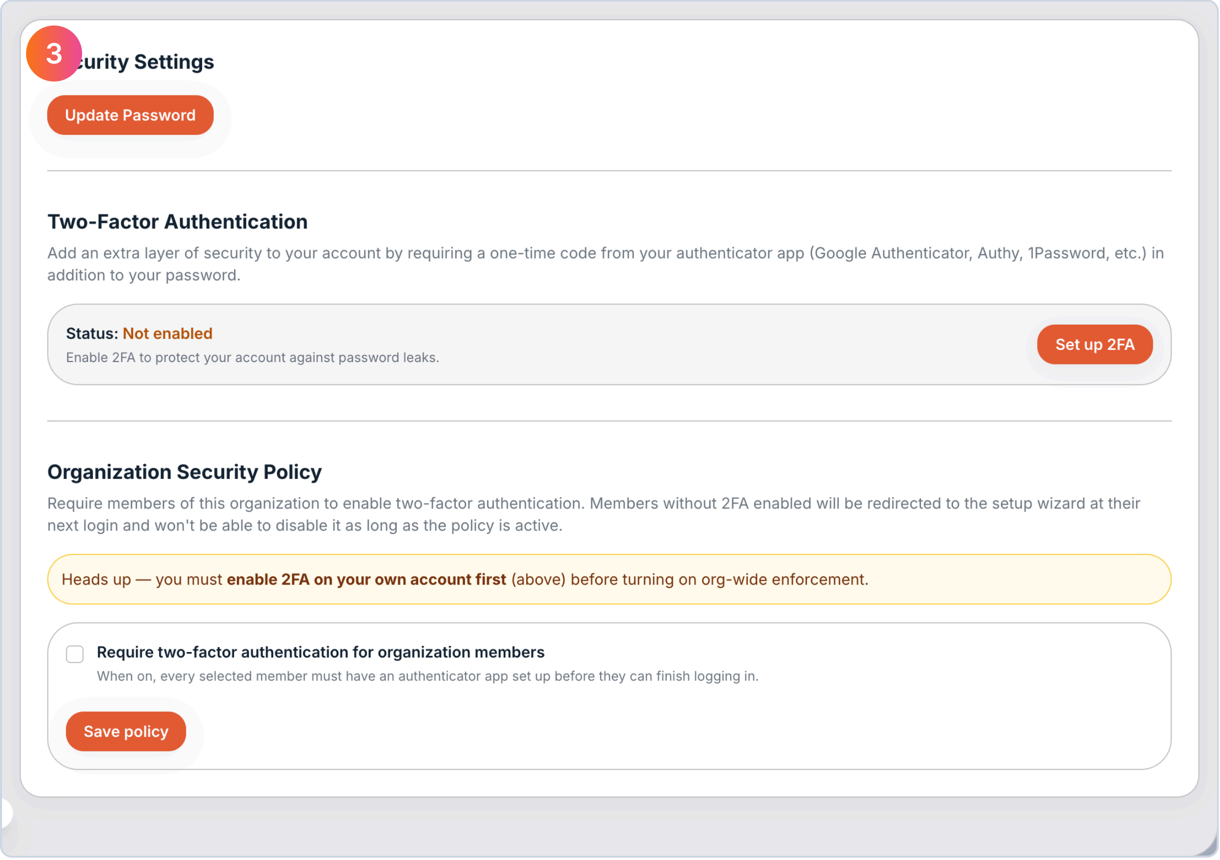
Tick **Enable PII Redaction** and it scrubs email addresses, phone numbers, card numbers, national insurance or social security numbers, IP addresses, and street addresses out of transcripts before they reach AI enrichment, dashboard responses, and post-call trigger matching.

Leave the entity checkboxes all unticked to scrub the default set — all six. Tick specific ones to narrow it.

Two things to be clear about: raw transcripts still exist in storage until your retention window expires, and there is a separate option to **keep a redacted copy alongside the raw transcript**, which is what auditors usually want.

Step 3 — Secure your own account

Setup → Security, open to everyone.



Step 3. Setup → Security. Password, 2FA, and the org-wide 2FA policy.

Three panels:

- **Security Settings** — change your password. Minimum 8 characters with an uppercase letter, a lowercase letter, and a number.
- **Two-Factor Authentication** — set up an authenticator app (Google Authenticator, Authy, 1Password). **Save the recovery codes when they are shown — that is the only time you will see them.** Each works exactly once.
- **Organization Security Policy** — owners only. Require 2FA across the organization, optionally scoped to specific roles.

Enable 2FA on your own account before turning on the org-wide requirement; the page will stop you otherwise.

There is no single sign-on and no session-timeout policy.

Step 4 — Schedule your reports

Setup → Reports, owner only. The heading says **Daily Reports Settings**, but the cadence is your choice.

Tick **Enable Daily Reports**, then set:

- **Who should receive daily reports? — owner**, **supervisor**, **Agents**.
- **Delivery Medium** — **Email**, **WhatsApp Group**, **Microsoft Teams**. Pick one or more.
- **Report Frequency** — **daily**, **weekly**, or **monthly**.
- **Schedule Time** — defaults to `09:00`, in your organization timezone from Step 1.

WhatsApp needs a **WhatsApp Group ID**; Teams needs an incoming-webhook URL from the channel you want alerts in.

Enabling this is also what switches on the emailed monthly write-up described in Insights.

Step 5 — Decide when a human gets pulled in

Setup → Escalation, owner only. Two independent rules on one page.

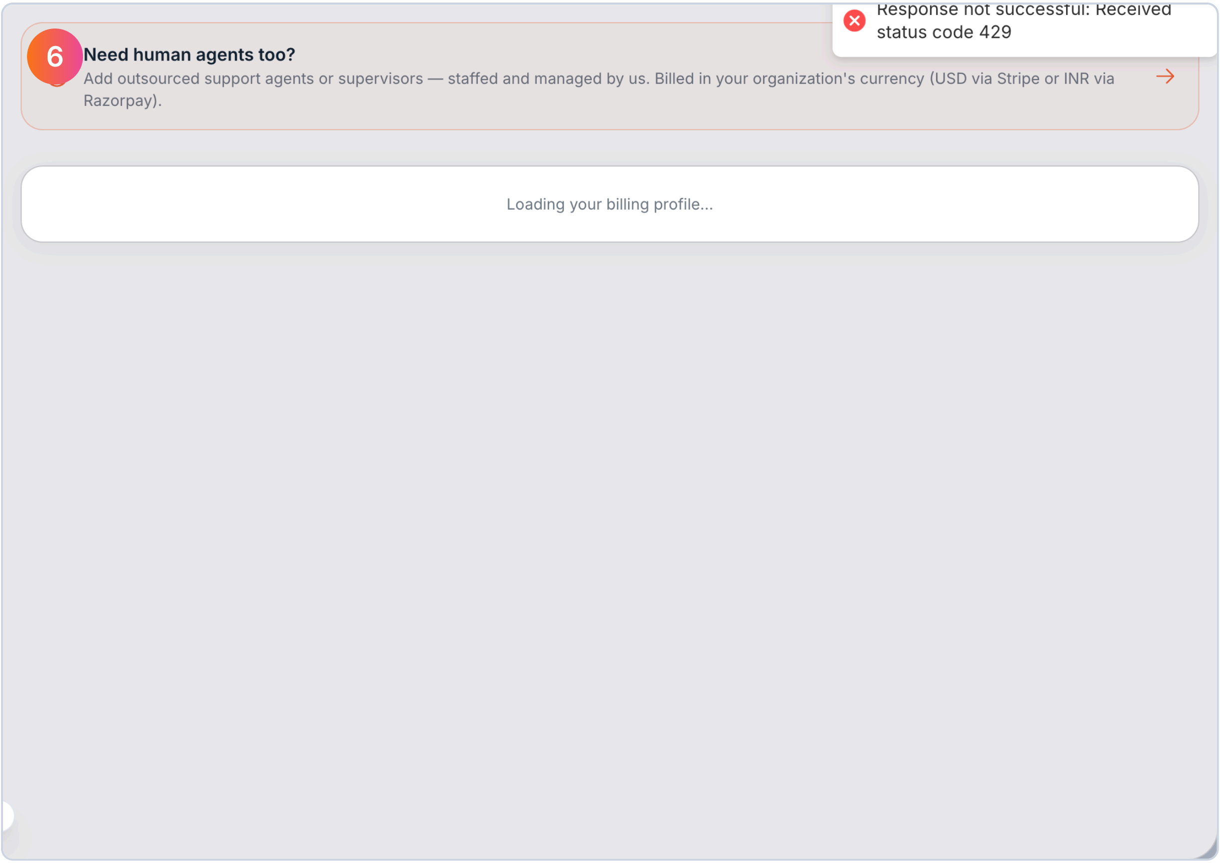
Escalated Support Chat Configuration flags an active conversation as *Escalated* when it has gone unanswered for the idle time you set — hours plus minutes.

Escalated Support Ticket Configuration does the same for tickets that have not been updated. Minimum 5 minutes.

Each has its own notification method and recipients. This is an alerting rule, not a live transfer — the actual handover to a person happens in Support.

Step 6 — Check your plan and usage

Setup → Subscription, hidden from agents and supervisors.



Step 6. Subscription, with usage measured against your plan's limits.

The top shows your **Current Plan**, status, **Period Start**, **Period End**, and **Next Billing**, plus **Trial ends on** if you are in one.

Usage Statistics is the panel to watch: **LLM Tokens**, **Messages**, **Chat Widgets**, **Workflows**, **Knowledge Bases**, and **Data Collections**, each as a used-against-limit bar.

For historical consumption and invoices, use **Setup → Usage History**, which breaks tokens and messages down per billing period with a **Download PDF** invoice link.

> If you installed FloGPT through Shopify, billing lives in Shopify. This page will say **Billing is managed in Shopify** and offer **Open Shopify Billing** instead of a plan grid. Cards under **Payment Methods** are not used in that case.

Step 7 — Create an API key, if you need one

Setup → API Keys, owner or admin. These are organization-scoped keys for the REST API at `/api/v1`.

Press **Create key**, name it, and tick the scopes it needs — they are granular, split read and write per area (chat widgets, call widgets, knowledge bases, CRM, conversations, call logs, analytics, data collections, and more).

Copy the key when it is shown. It is never displayed again. Afterwards you only see a masked prefix.

You can change a key's scopes later without rotating the secret. There is no rotation flow — to replace a key you revoke it and create another, and revoking cannot be undone.

Full API reference: API documentation.

Where to go next

- Every field, limit, scope, and role gate: Setup manual
- Start here — first-run setup in the right order
- Support — where escalated conversations actually land
- Insights — the reports you just scheduled