Chat Widget Guide

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1. What Are Chat Widgets?

Chat widgets are AI-powered assistants that you embed directly on your website. When visitors interact with the widget, they can ask questions and receive intelligent, contextual responses — powered by your own knowledge base documents.

Unlike generic chatbots, Talari.ai widgets answer from **your** data. Upload your professional documents, connect them to a widget, and visitors get accurate information specific to your practice, firm, or organization.

Common Use Cases

- **Customer support** — Answer frequently asked questions about your services, pricing, and policies
- **Lead generation** — Engage website visitors, qualify leads, and capture contact information
- **Client onboarding** — Guide new clients through your processes and requirements
- **Knowledge sharing** — Make your expertise accessible 24/7 through an intelligent FAQ assistant
- **Appointment guidance** — Help visitors understand what to expect and how to prepare

> **Example:** A therapy practice embeds a widget that answers questions about session formats, insurance acceptance, and what to expect during a first appointment — all from information sheets they uploaded to their knowledge base.

> **Example:** A law firm adds a widget to their website that answers common legal questions about their practice areas, using their own published legal guides and FAQ documents.

2. Setting Up Your Widget

Navigate to Widget Settings

1. Log in to the admin panel
2. Click **Widgets** in the navigation menu
3. You will see the Widget Settings Manager showing all your existing widgets

Create a New Widget

1. Click **Create Widget**
2. Fill in the **Basic** tab:
    - **Widget Name:** An internal name (e.g., “Main Website FAQ”)
    - **Slug:** A unique identifier used in the embed URL (auto-generated from the name)
    - **Language:** Primary language (English, German, or Polish)
    - **Show Avatar:** Toggle the animated avatar on or off
    - **Professional Knowledge Base:** Toggle access to the shared professional knowledge base (see Knowledge Source Configuration)
    - **Collections:** Select one or more document collections (see Knowledge Source Configuration)
3. Configure the **Prompt** tab:
    - **Assistant Identity:** The name and role the AI uses when responding
    - **System Prompt:** Instructions for how the AI should behave
    - **Welcome Message:** Greeting shown when the widget opens
    - **Appointment Booking URL:** External booking link (see Appointment Booking)
    - **Quick Action Buttons:** Conversation starters shown below the greeting
    - **Proactive Page Messages:** Notifications triggered by specific page URLs
4. Set up the **Avatar** tab:
    - Choose from available avatars: Nina, Nina-Doctor, Nina-Lawyer, Nina-Psychotherapist
    - Or use a text-based avatar
5. Configure the **Voice** tab (optional):
    - Enable text-to-speech for spoken responses
    - Select a voice (available in English, German, and Polish)
    - Preview the voice before saving
6. Customize the **Theme** tab:
    - Primary and secondary colors
    - Background color
    - Widget position on the page
7. Adjust the **Size** tab:

    - Widget width and height
    - Responsive limits for mobile devices
8. Configure the **Schedule** tab (optional):
    - **Business hours:** Set opening/closing times per day and your timezone
9. Add files in the **Files** tab (optional):
    - Upload files (images, PDFs, documents) that the AI can share with visitors
    - **Images** (JPG, PNG) are displayed directly in the chat when the AI references them
    - **Other files** appear as clickable download links
10. Click **Save**

> **Tip:** Start simple. Configure the basics (name, language, collection) and test the widget before customizing appearance and voice. You can always refine later.

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3. Knowledge Source Configuration

Your widget can draw knowledge from two independent sources. You can enable either, both, or neither — giving you full control over what information the AI uses when answering visitor questions.

Two Knowledge Sources

Source	What It Contains	Who Manages It
Professional Knowledge Base (PKB)	General professional knowledge shared across your organization (e.g., standard guidelines, best practices, general information about your industry)	Organization administrator
Collections	Your own specialized documents (e.g., your services, pricing, policies, FAQs specific to your practice)	You (the widget owner)

The Four Combinations

PKB	Collections	What the AI Uses
OFF	None selected	General LLM knowledge only — no documents. A warning is shown in admin.

PKB	Collections	What the AI Uses
ON	None selected	Professional knowledge base only (shared professional documents).
OFF	Selected	Your selected collections only (your own documents).
ON	Selected	Both — platform knowledge + your collections. Most comprehensive.

How to Configure

1. In Widget Settings, open your widget
2. Go to the **Basic** tab
3. **Professional Knowledge Base** toggle — enables/disables access to the shared professional knowledge base
4. **Collections** dropdown — select one or more of your document collections
5. Click **Save**

> **Important:** If both PKB is off and no collections are selected, the admin panel shows an info message: *“No knowledge source selected. The assistant will answer from general knowledge only — not from your documents.”* The widget will still work, but answers will not be grounded in any documents.

Creating and Connecting Collections

If you haven’t created a collection yet: 1. Go to **Collections** in the main menu 2. Click **Create Collection** and add a name 3. Upload your documents (FAQ sheets, service descriptions, policies, guides) 4. Wait for documents to finish processing (status should show “Completed”) 5. Return to Widget Settings and select the collection in the **Collections** dropdown

You can connect multiple collections to a single widget. The AI searches all selected collections when answering questions.

What Happens When Visitors Ask Questions

When a visitor types a question in the widget:

1. The system searches your enabled knowledge sources (PKB and/or collections) for relevant passages
2. Matching document sections are provided to the AI as context

3. The AI generates an answer grounded in your specific documents
4. The visitor receives an informed, accurate response

This process (called Retrieval-Augmented Generation, or RAG) ensures that the AI's answers reflect your actual services, policies, and expertise.

> **Example:** A law firm enables PKB (general legal knowledge) and connects their own "Family Law FAQ" collection. When a visitor asks "What documents do I need for a divorce filing?", the widget draws from both the platform's general legal guidelines and the firm's specific procedures.

> **Example:** A therapy practice disables PKB and connects only their "Services & Policies" collection. The widget answers exclusively from their own documents — no external knowledge mixed in.

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4. Embedding on Your Website

Copy the Embed Code

1. In Widget Settings, find the widget you want to embed
2. Click the **Embed** button (or the embed icon)
3. A dialog appears with a single script tag
4. Click **Copy Embed Code** to copy it to your clipboard

Paste into Your Website HTML

Add the embed code to your website, just before the closing `</body>` tag:

```
<script src="https://talari.ai/widget/embed.js"
  data-slug="your-widget-slug"
  data-token="your-embed-token">
</script>
```

The script automatically creates a **"Chat with AI"** bubble in the bottom-right corner of your page. The bubble label adapts to the visitor's browser language (English, German, or Polish). When a visitor clicks the bubble, the full chat widget opens. Closing the widget returns to the bubble.

Optional Customization

You can customize the widget appearance via data attributes on the script tag:

Attribute	Default	Description
`data-position`	`bottom-right`	Position: `bottom-right` or `bottom-left`
`data-width`	`420`	Widget width in pixels
`data-height`	`620`	Widget height in pixels
`data-offset-x`	`20`	Horizontal offset from edge in pixels
`data-offset-y`	`20`	Vertical offset from bottom in pixels
`data-bubble-color`	`#7c3aed`	Bubble background color (hex)
`data-open`	`false`	Set to `true` to start with the widget open

WordPress Integration

1. In your WordPress dashboard, go to **Appearance > Theme Editor** (or use a plugin like "Insert Headers and Footers")
2. Paste the embed code before `</body>`
3. Save and verify the bubble appears on your site

Testing Locally

1. Create an HTML file with the embed code
2. Serve it locally (e.g., `python3 -m http.server 8080`)
3. Open `http://localhost:8080/your-file.html` in a browser
4. The chat bubble should appear — click it to test the conversation

> **Note:** The widget must be served over HTTP or HTTPS (not `file://`) to work correctly.

Verifying on Production

After deploying to your live website: 1. Visit your website in a browser 2. Look for the "Chat with AI" bubble in the bottom-right corner 3. Click it to open the widget and ask a test question 4. Verify the response uses information from your connected collection

> **Tip:** Clear your browser cache (Ctrl+Shift+R) after deploying to ensure you see the latest widget version.

5. Demo Mode

What Is Demo Mode?

Demo mode allows visitors to experience the AI assistant without logging in or creating an account. The Talari.ai landing page features a demo widget with pre-configured personas:

- **Doctor** — Demonstrates healthcare-related conversations
- **Lawyer** — Demonstrates legal consultation scenarios
- **Therapist** — Demonstrates therapeutic session interactions

How Demo Widgets Differ from Production Widgets

Feature	Demo Widget	Production Widget
Login required	No	No (for visitors)
Persistent history	No	Limited
Custom knowledge base	No (uses demo data)	Yes (your documents)
Custom branding	No	Yes
Voice support	Limited	Full
Usage limits	Restricted	Based on subscription tier

Demo Limitations

- Conversations are not saved between visits
- Limited number of messages per session
- Uses demo knowledge base, not your own documents
- Cannot be customized with your branding

6. Advanced Configuration

Built-in Language Switcher

Every widget includes a built-in language switcher in the header bar. Visitors can click the flag buttons (🇬🇧 🇩🇪 🇵🇱) to switch between English, German, and Polish at any time during the conversation. The language change affects:

- **AI responses** — The assistant responds in the selected language
- **Voice output (TTS)** — Speech synthesis switches to the appropriate voice
- **Voice input (STT)** — Speech recognition adapts to the selected language

The widget automatically detects the visitor's browser language and sets it as the default. No configuration needed — this works out of the box.

> **Tip:** You do not need to create separate widgets for each language. A single widget handles all three languages, and visitors switch freely.

Welcome Message and Quick Actions

You can configure a **welcome message** that greets visitors when they open the widget, and **quick action buttons** that give visitors instant conversation starters.

Setting Up

1. In Widget Settings, open your widget
2. Go to the **Prompt** tab
3. Scroll down to **Welcome Message** — enter your greeting text (e.g., "Hi! How can I help you today?")
4. Under **Quick Action Buttons**, click **Add Quick Action** to create buttons:
    - **Button Label**: What the visitor sees (e.g., "Our Services")
    - **Message to Send**: What gets sent to the assistant when clicked (e.g., "What services do you offer?")
5. You can add up to 6 quick action buttons
6. Click **Save**

How It Works

- The welcome message appears as the first message when the widget opens
- Quick action buttons appear below the welcome message
- Clicking a button sends the configured message to the assistant
- Buttons disappear after the visitor sends their first message (they are conversation starters, not a permanent menu)
- The assistant is aware of the welcome message and will not repeat itself

> **Tip:** Choose quick actions that match your most common visitor questions. Good examples: “Our Services”, “Pricing”, “Book Appointment”, “Contact Us”.

AI-Generated Quick Reply Buttons

After each response, the AI assistant automatically suggests **2-4 contextual follow-up options** as clickable buttons below the message. These are different from the admin-configured quick actions above:

- **Admin quick actions** (Prompt tab): Static buttons you configure, shown once at the start
- **AI quick replies**: Dynamic buttons the AI generates based on the conversation context, shown after every response

For example, if a visitor asks about therapy services, the AI might suggest:

```
[CBT Therapy]  [Session Duration]  [Book Appointment]
```

If the visitor then asks about CBT, the AI might suggest:

```
[How It Works]  [Success Rate]  [Find a Therapist]
```

These buttons require no configuration — they work automatically. Quick reply buttons are only shown on the most recent assistant message. They are not spoken aloud in voice mode.

Chat Ratings

Visitors can rate each assistant response with **thumbs up / thumbs down** buttons that appear below every AI message. This helps you understand which responses are helpful and which need improvement.

Ratings are persisted in real-time and visible in the **Conversation Analytics Dashboard** (see below). Use satisfaction data to identify which responses need improvement.

Email Conversation Transcript

Visitors can email a copy of the conversation to themselves:

1. Click the **envelope icon** (📧) in the widget header
2. Enter an email address in the dialog
3. Click **Send**

The conversation is formatted as a styled HTML email and sent from `widget@talari.ai`. This is useful for visitors who need to reference the information later — especially valuable for medical, legal, and professional service practices.

> **Note:** The greeting message is not included in the email transcript — only the actual conversation.

Confidence Transparency

When the AI answers a question using your knowledge base (RAG), a small **confidence indicator** appears below the response:

- **High confidence** (green dot) — The answer is strongly supported by your documents
- **Medium confidence** (yellow dot) — The answer is partially supported; some information may come from general knowledge
- **Low confidence** (orange dot) — The answer has weak document support; the visitor may want to verify with your team

This feature requires no configuration — it appears automatically when the widget is connected to a knowledge base (PKB or collections). Answers that don't use RAG (general knowledge only) show no confidence indicator.

> **Why this matters:** Confidence transparency builds trust with visitors, especially in professional services (medical, legal, therapy) where accuracy matters. No other chat widget offers this level of transparency.

Return Visitor Recognition

The widget remembers returning visitors using the browser's local storage. When a visitor returns to your website, the widget personalizes the greeting:

- **First visit:** "Hi! How can I help you today?" (your configured greeting)
- **Return visit:** "Welcome back! Last time we talked about 'anxiety management'. Hi! How can I help you today?"

This works automatically — no configuration needed. The widget stores: - Visit count - Last conversation topic (first question the visitor asked) - Last visit timestamp

Privacy notes: - Data is stored only in the visitor's browser (localStorage), not on the server - No personal information is collected - Clearing browser data removes all widget memory - If localStorage is unavailable (private browsing, iframe restrictions), the widget gracefully falls back to the standard greeting

Page-Aware Proactive Messages

Proactive messages let the widget **reach out first** — showing a notification above the chat bubble based on which page the visitor is browsing. Instead of waiting for the visitor to click the chat bubble, the widget can prompt them with a relevant question.

How It Works

1. The embed script automatically detects the visitor's current page URL
2. The widget matches the URL against your configured triggers
3. After a configurable delay, a notification appears above the chat bubble
4. Clicking the notification opens the widget

Setting Up

Proactive messages are configured in the widget's **Prompt** tab (below Quick Action Buttons). Each trigger has:

- **URL pattern**: A substring to match against the page URL (e.g., `/pricing`, `/services`, `/contact`)
- **Message**: The text shown in the notification (e.g., "Have questions about our pricing?")
- **Delay**: Seconds to wait before showing (default: 5 seconds)

Example

URL Pattern	Message	Delay
`/pricing`	"Have questions about our pricing plans?"	5s
`/services`	"Want help choosing the right service?"	10s
`/contact`	"Need to reach us? I can help!"	3s

The notification automatically hides after 15 seconds if the visitor doesn't interact.

Embed Script Placement

The embed script must be placed on **every page** where you want the widget to appear. This is standard practice — the same single `<script>` tag goes in your website's global template or footer (e.g., WordPress footer, Next.js layout, or HTML `<body>` end). It loads once and appears on all pages automatically.

The proactive message system works as follows:

1. The embed script reads the current page URL (e.g., `/pricing`, `/services/therapy`)
2. It passes this URL to the widget
3. The widget checks the URL against your configured triggers
4. If a match is found, after the configured delay, a notification badge appears above the chat bubble
5. Different pages show different messages — or no message if no trigger matches

Full Example

Your website has 5 pages. You place the embed script on all of them and configure 2 triggers:

Page	URL	Trigger Match	What Happens
Home	`/`	No match	Chat bubble only (no notification)
Services	`/services`	No match	Chat bubble only
Pricing	`/pricing`	`/pricing` matches	"Have questions about our pricing?" appears after 5s
Contact	`/contact`	`/contact` matches	"Need to reach us? I can help!" appears after 3s
Blog	`/blog/post-1`	No match	Chat bubble only

> **Tip:** Keep proactive messages short and relevant. One trigger per page is ideal — too many can feel intrusive.

Business Hours Awareness

The widget can display an informational banner when visitors arrive outside your business hours. The AI assistant still responds normally — the banner simply sets expectations.

How It Works

When business hours are configured, the widget checks the current time (in your timezone) against your schedule. If the visitor arrives outside business hours, a subtle banner appears at the top of the conversation:

> "We're currently closed. We open again Monday at 09:00. I can still answer your

> questions!"

The banner finds the **next actual opening time** — if it's Friday evening, it shows Monday's opening time (not Friday's).

Setting Up

1. In Widget Settings, open your widget
2. Go to the **Schedule** tab
3. Toggle **Enable business hours**
4. Select your **timezone** (e.g., Europe/Berlin, America/New_York)
5. Toggle each day on/off and set opening and closing times
6. Click **Save**

Example schedule: - Monday–Friday: 09:00 – 17:00 - Saturday: 10:00 – 14:00 - Sunday: Off (toggle disabled)

If business hours are not enabled, no banner is shown (the widget behaves as always available).

Appointment Booking

The widget includes a built-in **appointment booking button** that appears as a persistent banner above the message input area. When configured, visitors can click the button to open your external booking page (Calendly, Cal.com, or any booking URL) in a new tab — without leaving your website.

Setting Up

1. In Widget Settings, open your widget
2. Go to the **Prompt** tab
3. Find the **Appointment Booking URL** field (marked with a calendar icon)
4. Paste your booking URL (e.g., `https://calendly.com/your-practice`)
5. Click **Save**

The URL must start with `https://` or `http://`. Invalid URLs are highlighted in red and will not be saved.

How It Works

Once configured, two things happen:

- **Booking button**: A persistent, themed banner appears above the message input in the widget. It shows a calendar icon and a localized label ("Book an appointment" / "Termin

buchen" / "Umów wizytę") that adapts to the visitor's selected language. Clicking it opens the booking URL in a new tab.
- **AI awareness**: The AI assistant also knows about the booking link and will mention it naturally when visitors ask about scheduling, appointments, or booking.

The button uses your widget's primary theme color as its background with white text, ensuring high visibility regardless of your color scheme.

Removing the Booking Button

To remove the booking button, simply clear the **Appointment Booking URL** field in the Prompt tab and save. The button disappears immediately.

> **Example:** A therapy practice pastes their Calendly link. Visitors see a "Book an appointment" button at the bottom of the widget. They can click it to schedule directly, or ask the AI "How do I book a session?" and receive the link in the conversation.

> **Example:** A law firm uses Cal.com for consultations. The widget shows "Termin buchen" for German-speaking visitors and "Book an appointment" for English speakers — same link, automatically localized.

Rich Content: Images, Links, and Files

The widget renders rich content in chat messages:

- **Images** — When the AI references an uploaded image (from the Files tab), it displays directly in the conversation. Visitors can see photos, diagrams, and illustrations without leaving the chat.
- **Links** — URLs in responses are rendered as clickable links that open in a new tab.
- **Formatted text** — The AI can use bold, italic, headers, bullet lists, and tables for clear, structured responses.
- **File downloads** — Non-image files (PDFs, documents) appear as clickable download links.

> **Example:** A dental practice uploads a photo of their clinic to the widget's Files tab. When a visitor asks "What does your clinic look like?", the AI shows the photo directly in the chat conversation.

> **Example:** A law firm uploads their fee schedule PDF. When a visitor asks about pricing, the AI provides a download link to the official document.

Theme Customization

All subscription tiers include full widget theme customization:

1. In Widget Settings, go to the **Theme** tab
2. Customize primary, secondary, background, header, border, and input colors
3. Choose a font family
4. Preview changes before saving

Multiple Widgets Per Site

You can embed multiple widgets on the same website:

- Each widget must have a unique slug
- Use different widgets on different pages (e.g., one for FAQ, one for appointment booking)
- Only one widget should be active on any given page to avoid conflicts

API Authentication for Widgets

Widgets use **embed tokens** (not JWT) for authentication:

- Tokens are generated automatically when you create a widget
- Tokens can be regenerated in Widget Settings if compromised
- Embed tokens provide limited access — only to the widget's configured collection and AI features

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7. Troubleshooting

Widget Not Appearing

1. Verify the embed code is correctly placed before `</body>` in your HTML
2. Check your browser's developer console (F12) for JavaScript errors
3. Ensure the widget is marked as **Active** in Widget Settings
4. Try accessing the widget URL directly in your browser to verify the script loads
5. Check if an ad blocker or browser extension is blocking the widget script

Widget Not Connecting to Knowledge Base

1. Verify that either the **Professional Knowledge Base** toggle is on, or at least one collection is selected in the widget's **Basic** tab
2. Ensure any selected collection has at least one processed document
3. Check that documents in the collection have a "Completed" status (not "Processing" or "Failed")
4. Try removing and re-selecting the collection

CORS Errors

If you see CORS (Cross-Origin Resource Sharing) errors in the console:

1. Verify your website's domain is listed in the CORS allowed origins
2. Contact your administrator to add your domain to the CORS configuration
3. Ensure you are not loading the widget from `file://` — use a web server (even `localhost`)

Performance Issues

1. Large knowledge bases may slightly increase response time
2. The first message after a period of inactivity may take a few seconds longer (cold start)
3. If responses are consistently slow, check your internet connection
4. Voice responses (TTS) require an additional processing step — consider disabling voice if speed is critical

Widget Shows Generic Answers

If the widget is not referencing your documents:

1. Check the **Basic** tab — ensure either the **Platform Knowledge Base** toggle is on, or at least one collection is selected. If both are off/empty, the AI uses only general knowledge.
2. Ensure your documents have finished processing (status should be "Completed")
3. Check that the documents contain content relevant to the questions being asked
4. Try re-uploading documents if they were uploaded a long time ago

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Conversation Analytics Dashboard

The admin panel includes a built-in analytics dashboard that tracks widget usage across all your widgets. Access it via **Widgets > Analytics** tab.

What It Tracks (GDPR-Safe)

No message content is stored — only aggregated metadata:

- **Total conversations** — how many chat sessions visitors have
- **Message counts** — messages per conversation
- **Satisfaction rate** — percentage of positive ratings (thumbs up vs down)
- **Average confidence** — how well your knowledge base covers visitor questions
- **Average duration** — how long conversations last
- **Hourly activity** — when visitors are most active
- **Per-widget comparison** — if you have multiple widgets, see which performs best

Dashboard Sections

1. **KPI Cards** — Four summary metrics: conversations, satisfaction %, confidence, duration
2. **Conversations Over Time** — Bar chart showing daily conversation volume
3. **Activity by Hour** — 24-hour breakdown of when visitors chat
4. **Widget Comparison** — Table comparing all your widgets side by side
5. **Recent Conversations** — Latest sessions with ratings, confidence, language, and duration

Date Range

Use the date pickers at the top to filter data by time period. Default shows the last 30 days.

How Data Is Collected

- Conversation metadata is recorded automatically after each AI response (no manual setup needed)
- Thumbs up/down ratings from visitors are persisted in real-time
- Data appears in the dashboard immediately — no delay

> **Privacy:** No conversation content, IP addresses, or personal information is stored. Only anonymous session metadata (message count, duration, language, confidence scores). Fully GDPR-compliant.

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