

Chatbot OneMatix.AI settings

** The features presented in this guide may be active or inactive depending on the options included in your active subscription.*

Getting Started With Your Chatbot Settings

This guide will help you navigate the chatbot settings page and provide insight on how to overcome some common challenges, enabling you to fine-tune your chatbot functionality.

Core Capabilities

AI-Powered Automation for:

-  **24/7 Communication:** Engage via chat and voice calls
-  **Instant Q&A:** Provide accurate responses to customer inquiries
-  **Lead Capture & Nurturing:** Automatically collect and qualify leads

Workspace Manager

Workspace is where you manage your chatbot with customized Open AI API keys, custom domains and your team email accounts.

Go to Workspace Manager, create a name for your workspace. Under your workspace, create a chatbot. Different BYOK(bring your own key) API key can be set up for each workspace. You can also invite at least one team member to manage the chatbot under each work space. One email account currently can only create one chatbot.

General Settings

Your chatbot's settings page is its command center, a place where you can make key adjustments to your bot's behavior and functionality. Let's take a look at each setting and what it accomplishes.

Open AI

OpenAI

Base Prompt (system message)

Reset

I want you to act as a document that I am having a conversation with. Your name is "AI Assistant". You will provide me with answers from the given info. If the answer is not included, say exactly "Hmm, I am not sure." and stop after that. Refuse to answer any question not about the info. Never break character.

Model

gpt-3.5-turbo

1 message using gpt-3.5-turbo costs 1 message credit. 1 message using gpt-4 costs 20 message credits.

Temperature

0

Reserved

Creative

Save

Base Prompt

The base prompt allows you to establish the nature of your chatbot's interactions and give your bot a personality. You can adjust and modify the base prompt to better suit your needs. For example, you can:

- **Modify the bot's personality**
 - If you'd like your bot to have a casual and friendly tone, you can experiment with a phrase like this in your base prompt: "You are a friendly and casual AI Assistant."
- **Change how the bot responds to unknown queries**
 - Instead of saying "Hmm, I am not sure.", you might want it to say something like, "I'm sorry, I don't have the information you're looking for, please contact customer support."
- **Direct its focus on certain topics**
 - If you want your bot to be a specialist in a certain area, you could add, "You are an AI Assistant who specializes in providing information about environmental sustainability."
- **Define its boundaries**
 - If you want to restrict your bot from providing certain types of information, you could specify, "Do not share financial advice or information."

By tailoring your base prompt, you can ensure that your bot provides the necessary information, and does it in a way that aligns with your brand's voice and values. Furthermore, it can help your bot avoid hallucinations, and prevent it from answering questions outside the scope of the data provided.

Model

This setting allows you to choose the Open AI model you prefer your chatbot to use. By default it's set to the gpt-3.5-turbo model, which uses one credit per message. You can opt to use gpt-4, which provides more accurate responses, but it uses 20 credits per message. If you run out of credits and are on the Unlimited plan, you can use your personal Open AI API key. You can join the wait-list to attain a gpt-4 API key by sending a request to OneMatix.AI's support email.

Temperature

The temperature corresponds with the "creativity" of the bots responses. This value is set at zero, which instructs your chatbot to choose the most likely output when generating responses, resulting in more consistent and less random answers. You can adjust this number and experiment with the bot to fit your needs.

Access

Access

Visibility

private

'private': No one can access your chatbot except you (your account)

'can be embedded on website': Other people can chat with your chatbot if you send them the link. You can also embed it on your website so your website visitors are able to use it.

Only allow the iframe and widget on specific domains

☐

Rate Limiting Reset

Limit the number of messages sent from one device on the iframe and chat bubble (this limit will not be applied to you on chatbase.co, only on your website for your users to prevent abuse).

Limit to only messages every seconds.

Show this message to show when limit is hit

Too many messages in a row

Save

Visibility

You can set your chatbot visibility by selecting 'private' or 'public'. 'private' means that only you have access to the bot, and cannot embed it on a site. 'public' means that anyone with the link can chat with your chatbot if you send them the sharing link, and it can be embedded on your website.

Domains

Specify the website domains where you want to embed your chatbot in the text box here.

Usage Limit Settings

OneMatix.AI offers rate limiting to prevent any abuse from users by limiting the number of messages sent from one device on the iframe and chat bubble. By default, it's set to allow 5 messages every 60 seconds, but you can adjust these values.

Leads

You can prompt a user to input their name, email address and/or phone number when opening the chatbot. The customer information is available to view in the dashboard under the "Leads" tab. You can download them in csv format, along with the conversation history in JSON format.

Chat Interface

You can adjust the user interface of the chatbot and improve the user experience by adjusting the "initial messages", "suggested messages", theme, logo, alignment, and colours.

Specifically, to provide clear guidance, you might consider customizing the 'initial message' and 'suggested messages'. The 'initial message' serves as your chatbot's first point of contact with users. This message sets the

tone and invites users to engage. The 'suggested messages', function as prompts to nudge users towards inquiries. These can be tailored to commonly asked questions or important aspects of your service, such as 'What is example.com?' or 'How does it work?'. In essence, these customizations guide the users' journey.

- **Lead Magnet:**

Set up the period of time after which the chat bubble will pop up automatically to engage conversation and capture leads. It is under Settings -> Chat Interface.

- **Human Takeover:**

This email is specified in the case that visitors want to talk to humans instead of chatbot. By default, it is set up as your login email. It is under Settings -> Chat Interface.

Sources

There are 5 types of data formats for training the chatbot: Files, Text, General Website, Q&A. Every single data format can be used for training. You can also use all different data sources to train your chatbot, but please avoid duplicating content. You need to Retrain Chatbot every time you upload a new data source so that the changes can be updated.

- **Files:**

All supported files (.pdf, .doc, .docx, .txt) can be uploaded to knowledge base and trained the chatbot. You need to hit the Retrain Chatbot button after uploading files in order to update your chatbot with new data.

- **Text:**

The text section is used when you want to amend new data to your chatbot in general. The length of your content can't be less than 100 characters.

- **Website:**

Input the url of your target website to scrape the content of website and retrain your chatbot.

- **Q&A:**

After you add a pair of question and answer to your chatbot, you need to Retrain Chatbot so that the changes can be updated.

Delete all

Question

How to make appointment schedule

Answer

Appointment schedule feature currently only work with Text SMS feature.

Add

Included sources:

1 File (8693 chars) 1 Q&A (104 chars)

Total detected characters: 8797 / 400,000 limit

Retrain Chatbot

Refine the Chatbot's Instructions

The instructions shapes your chatbot's behavior and responses. Currently, default base prompt is used to make appointments. To ensure your bot only answers questions about the given document, specify this in the instructions (Settings->Model->Base Prompt).

Utilize the "Revise" Feature and Q&A Data Type

The "revise" feature is accessible from the dashboard in your conversation history. It is a tool for tweaking responses.

OneMatix.AI - Chat

Chatbot Settings **NEW** Voice AI Leads Appointments Live Chat Sources Embed on site Integrations

Lead Form Chat Logs Leads Appointments Voice Logs

2025-06-15 → 2025-07-16

Please enter Session ID

Export

Customer: What can AI Chatbot do fo... 35 minutes ago

Bot: # Benefits of AI Chatbots for Your Website AI chatbots can significantly enhance your website's...

Customer: What can AI Chatbot do for m... an hour ago

Bot: # Benefits of AI Chatbots for Your Website AI chatbots can significantly enhance your website's...

What can AI Chatbot do for my website?
07/15/2025 12:14 AM

Benefits of AI Chatbots for Your Website

AI chatbots can significantly enhance your website's functionality and user experience. Here are some key benefits:

- 24/7 Customer Support**
 - Availability:** Chatbots can provide round-the-clock assistance, ensuring that your customers can get help anytime.
 - Instant Responses:** They can answer frequently asked questions instantly, reducing wait times for users.
- Lead Generation**
 - Engagement:** Chatbots can engage visitors and collect information, helping to convert them into leads.
 - Data Collection:** They can gather user information such as names, emails, and preferences for future marketing efforts.
- Personalized User Experience**
 - Tailored Recommendations:** Chatbots can analyze user behavior and preferences to offer personalized product or service recommendations.

If you're not satisfied with how your chatbot answered a particular query, you can use this feature to alter the response to fix it for the future. Additionally, using the Q&A data type can help your chatbot generate better answers by referring to pre-set questions and answers. The responses you revise will appear in the Q&A tab under "Sources."

Delete all

Question

How can I get a refund?

Answer

You can request a refund by filling out our refund form here: www.example.com/refunds

Add

Custom Domain

Use your own custom domains for the embed script, iframe, and chatbot link instead of OneMatix.AI.

Domains

Use your own custom domains for the embed script, iframe, and chatbot link.

*Note: If your domain is example.com, we recommend using chat.example.com as your custom subdomain. You can replace chat with anything like, as long it's a valid subdomain.

How to use:

1. Go to the domain name service provider and find the domain name you want to configure for DNS resolution.

Type	Host	Value	TTL	
☐ A Record	example.com	192.168.1.1	300	
☐ CNAME Record	chat	example.com	300	
☒ CNAME Record	chat	newoaks.ai	Automatic	

2. Update DNS records: Look for the DNS (Domain Name System) settings or DNS management options. Add or modify the DNS records to configure your custom domain. Use CNAME (Canonical Name) record.
3. Point the domain to your website or service: In the DNS settings, specify the destination URL(newoaks.ai).
4. Click save.

Make Appointment (Calendly)

You need to create a calendly account and authorize New App AI to access your calendly events:

1. Sign Up/Log In: If you don't have a Calendly account, go to the Calendly website and sign up for a new account.
2. Authorization: If you already have an account, authorize OneMatix.AI to log in using your credentials.
3. Select Event Type
4. Write suggested message on chatbot interface to intrigger your calendar

OneMatix.AI - Chat

Chatbot Settings ^{NEW} Voice AI Leads Appointments Live Chat Sources Embed on site Integrations

Appointments

Enable Appointments



Calendly Authorization

Google Calendar Authorization

Microsoft Calendar Authorization

[View Appointment Records >>>](#)

Suggested Messages for Appointments or Custom Trigger Keywords

Please enter Appointment Messages.

Enter each message in a new line.

Toll Free Text SMS Integration:

- Apply for a gmail account and a toll free number.
- Authorize OneMatix.AI to deploy chatbot to your toll free number.
- Step by Step instruction will be provided to premium subscribers after logging in.

Notification Settings

Your notification settings allow you to receive email updates with chat records from your bot. You can enable notifications by typing an email and clicking "Add Email."

Next steps

By understanding each setting and adjusting them according to your business needs, you can fully leverage the potential of your chatbot. Ensuring your bot is optimized and well-configured will provide your users with a smoother, more intuitive, and effective interaction experience.

Check out our next article for more tips on optimizing user experience with OneMatix.AI.

Livechat settings

1. Configuring Live chat

How to configure Live Chat on Onematix AI

Here are the steps to enable Live Chat for your chatbot on Onematix AI platform:

- After login, go to Work Space panel
- Go to the Live Chat section and it will look something like this:

OneMatix.AI - Chat

Chatbot Settings ^{NEW} Voice AI Leads Appointments Live Chat Sources Embed on site Integrations

Custom Live Chat

Enable Live Chat

[Live Chat Guide](#)

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Step-in Chat Message

Live chat is starting now.

Step-out Chat Message

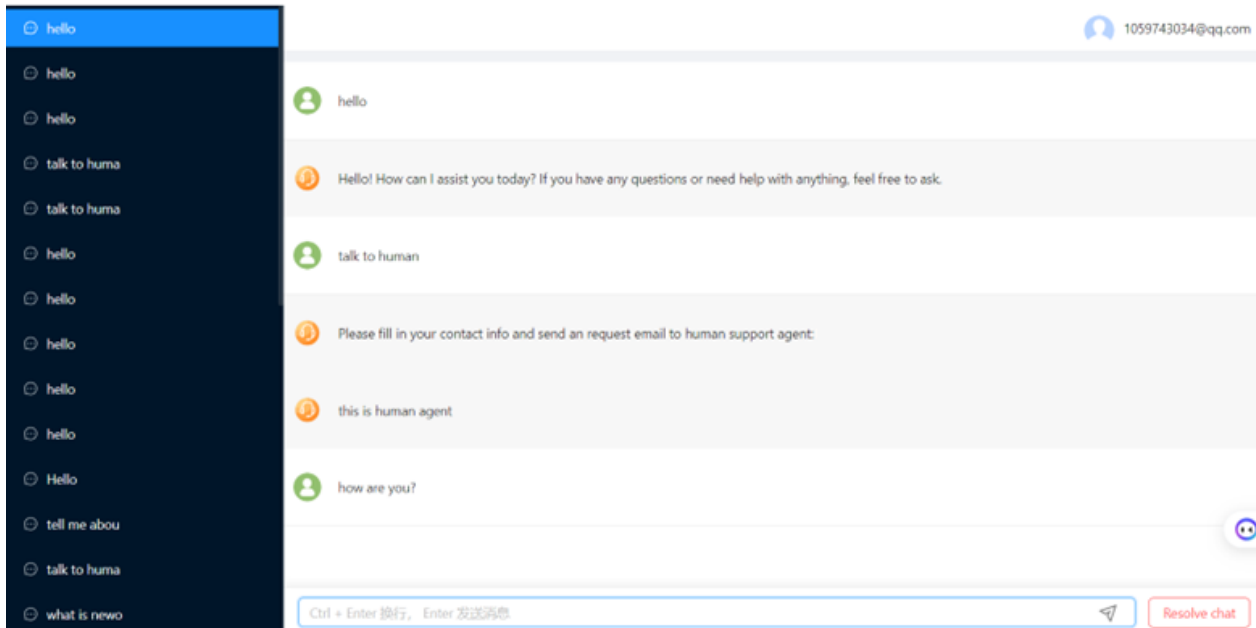
Livechat is ended.

2. Enable Live Chat:

Switch the enable live chat button on. Select one or multiple chatbots that you want to switch on live chat feature, then click save button.

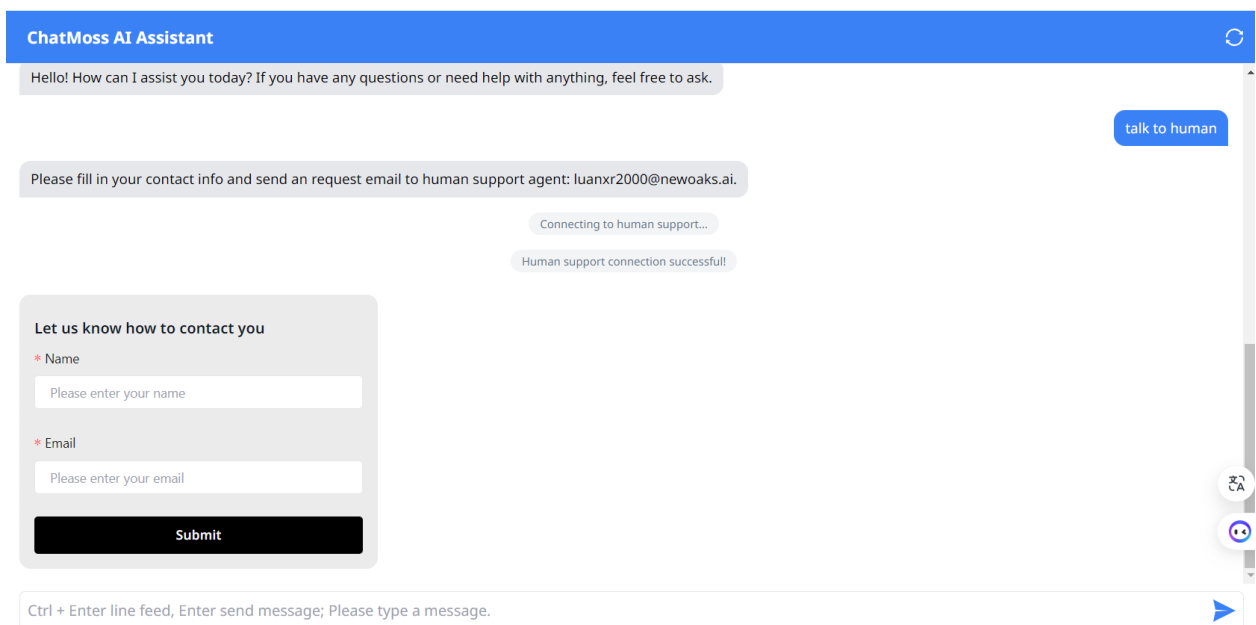
- You will receive an email notification from the email address for Human Takeover (chatbot->settings->chat interface->human takeover)

- Click the link in your email, or the link under enable live chat to start your live chat.
 - Agent live chat panel
 - Left hand side is the conversation threads, right hand side is conversation interace



3. Chatbot conversation Transition to Live Chat:

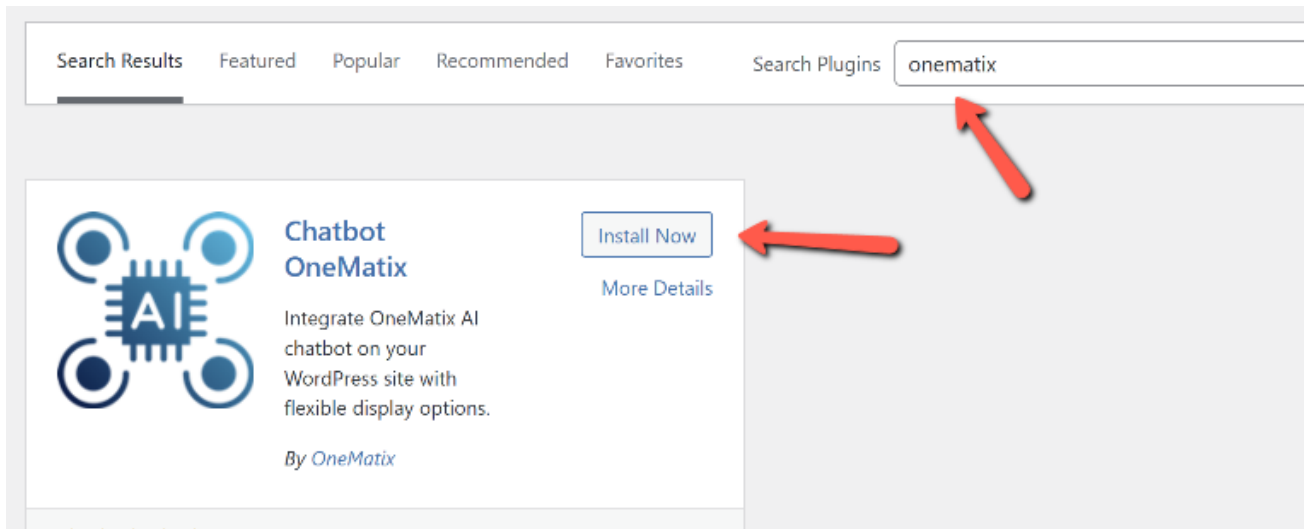
Customers will see a lead form, then "connecting to human support" message during the transition.



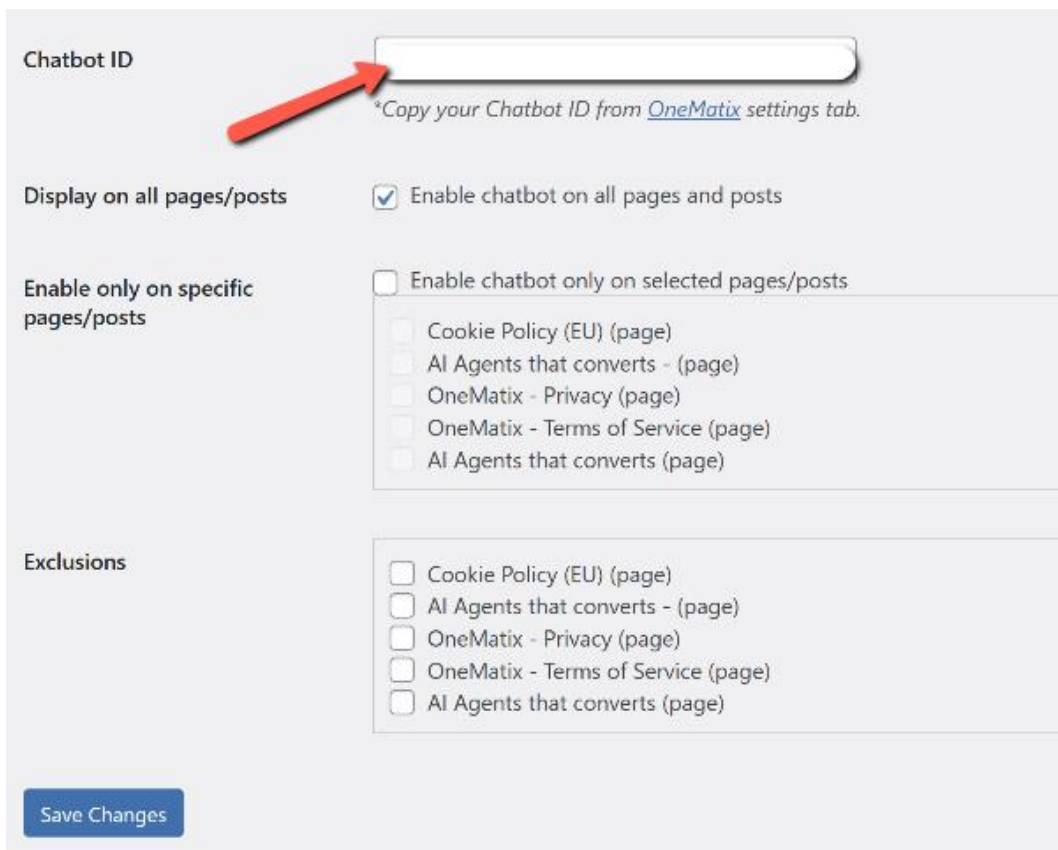
The chat will be resolved if there is no response within 5 minutes of successful live chat connection.

Website settings

In WordPress site, search plugin **onematrix** and install it.



At Chatbot ID copy your Chatbot ID from OneMatrix settings tab.



You have options: Display on all pages/posts or Enable only on specific pages/posts

Mail: support@chat.OneMatix.AI