Creating an AI Chatbot *Workbook*

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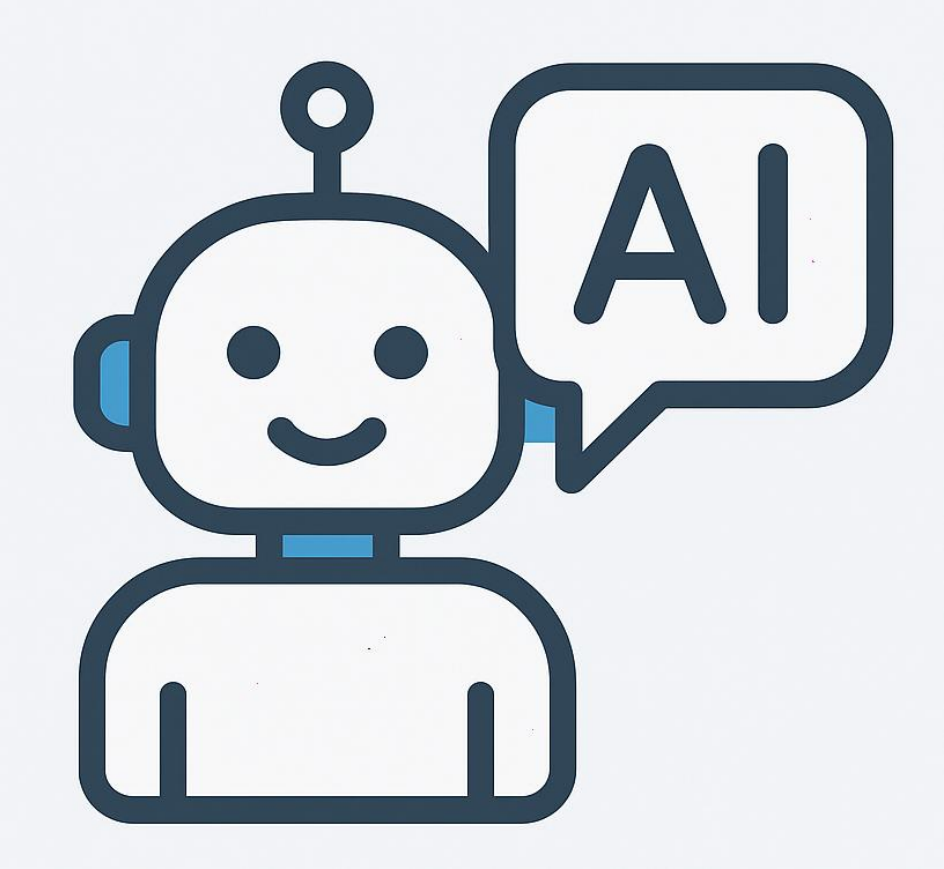
November 2025



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Steps in creating your own AI Chatbot

Work through the steps described below to set up and configure your own AI chatbot.

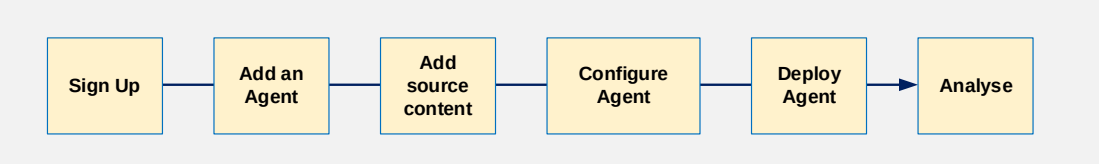


Figure 1: Steps in setting up your AI chatbot

We'll be using a tool called CustomGPT to demonstrate the process of AI chatbot creation, configuration, training and deployment.
The steps may sometimes refer to other documents or websites for additional information. Please check with your ISTC Conference coordinator or the session presenter for details of where to find these documents.

Note: In this document we may use the terms *AI chatbot*, *AI assistant* or *Agent* to refer to the same concept, depending on the context and the User Interface.
We are using UK spelling, except when we refer to elements on the user interface in US English.

Step 1: Sign up for an account

Sign up for the 7-day trial version at https://customgpt.ai/brlp/custom-gpt-ai/

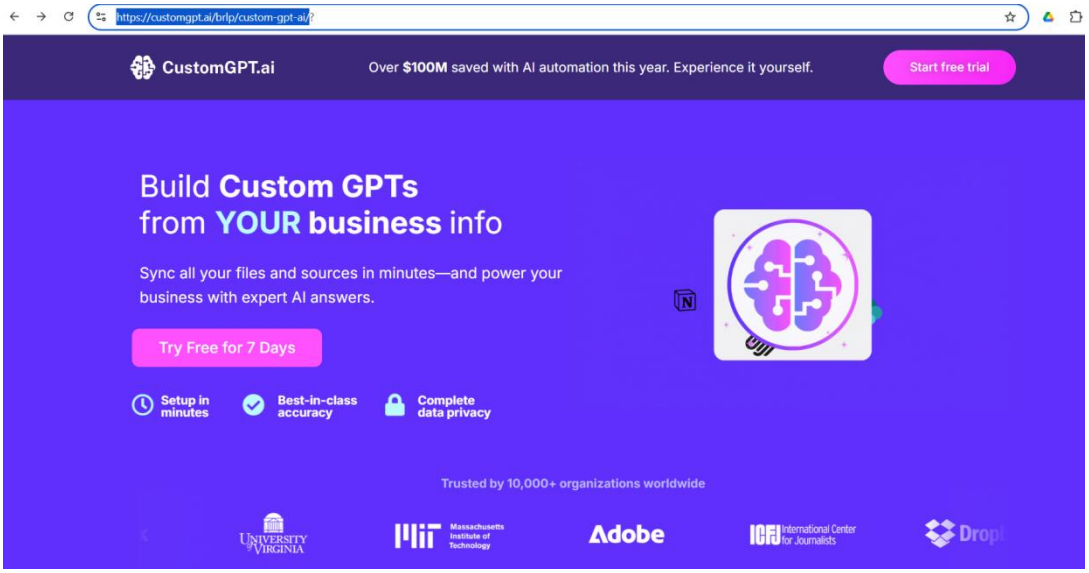


Figure 2: CustomGPT Home page - click the 'Start free trial' button

For today's session we'll be exploring and configuring options available on the trial version.
Be aware that there may be some restrictions if you sign up for the Standard trial version account.

Notes:

- The 7-day trial version requires you sign up with an email address from a company domain (i.e. not a general email domain such as gmail, Microsoft or yahoo).
- You will also need to enter credit card details. You can cancel your subscription after the workshop, so you aren't billed after the 7-day trial period.

Quick Agent setup wizard

After signing up for an account, the first time you access your online account CustomGPT will guide you through a simplified quick-step process to help you set up your first agent.

1. Pick a data source for your agent
2. Select the agent's purpose.
3. Build your agent.

After the agent is set up, you can view the dashboard, update the agent or add additional agents.

Note: For today's session, we won't be using the quick agent setup wizard.

Familiarise yourself with the Dashboard

You can access your dashboard at: https://app.customgpt.ai/

See the example below (for an existing CustomGPT account). The dashboard displays summary statistics on your agent's usage. Use the options on the left-hand menu to navigate:

- To view documentation and guides, click **Resources**.
- To view your account and billing details, click **My Profile**.

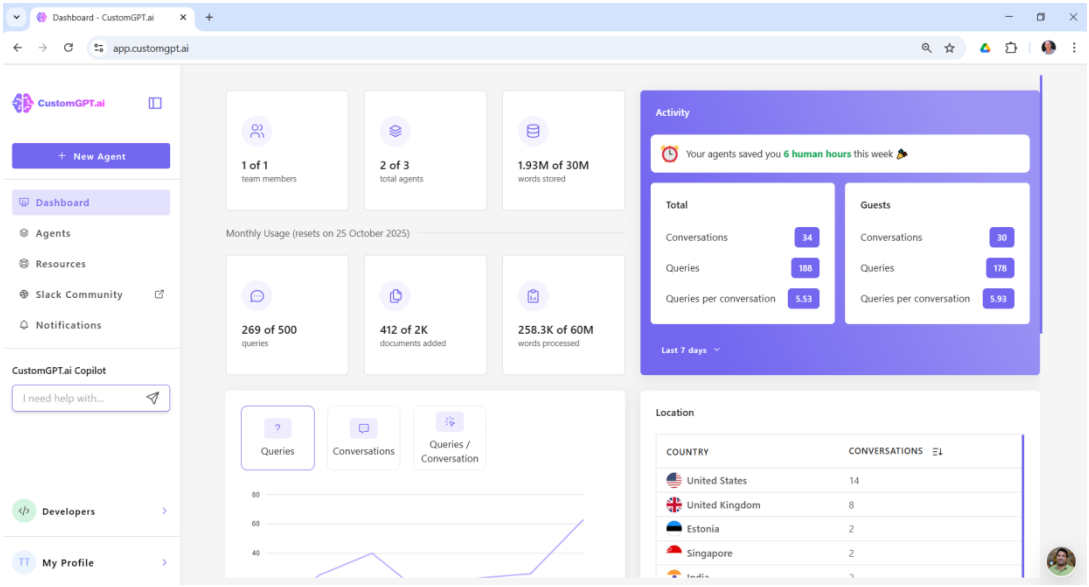


Figure 3: CustomGPT Dashboard

The **Profile** section provides details of your current licence plan.

Step 2: Add an agent

An agent is an AI assistant or chatbot instance that has been trained on your source content and personalised with rules and behaviour. You can implement multiple agents (up to the number allowed for your licence). For example, you may want to set up separate agents for your sales website, your client support website and your developer websites, or for internal and external facing content. You can also set up different agents for test and production instances, or to support different languages.

To add an agent:

1. Click **New Agent**.
2. Add source content to your agent. See Step 3: Add source content.
3. Select the agent's purpose.
   See the example below, showing two agents set up on an account.

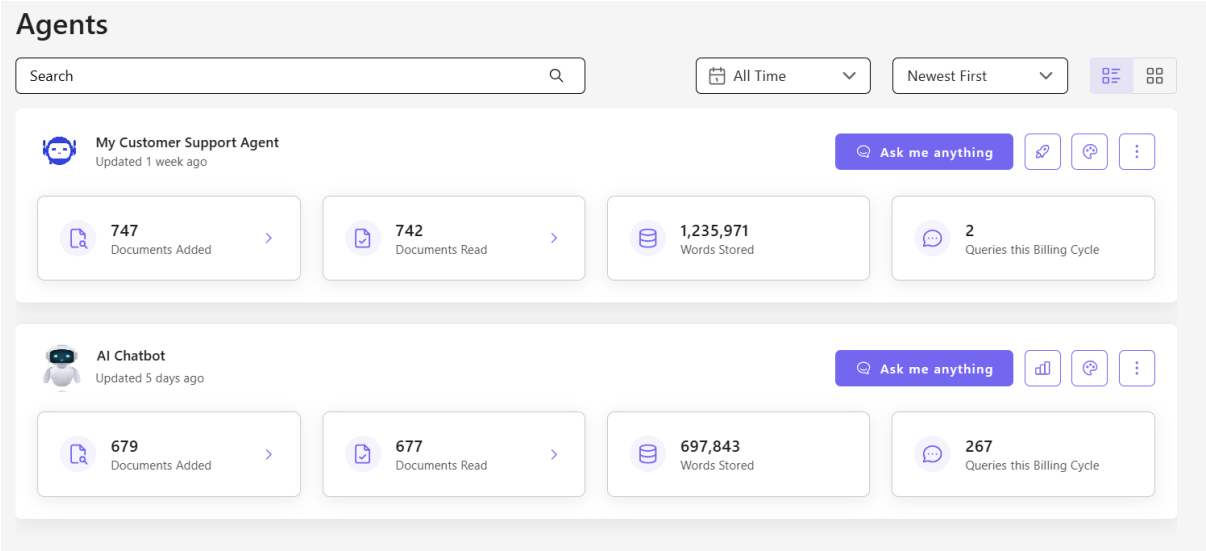
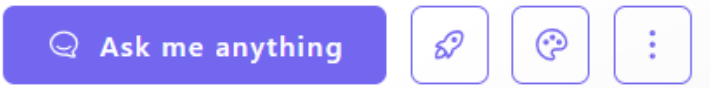


Figure 4: Add an Agent

You can use the buttons at the top right of your agent to train and configure your agent (options will change depending on the agent's status):



Options include:

- **Build** — train your agent on source content
- **Personalise** — customise the agent's appearance, behaviour and rules
- **Deploy** — deploy your agent to a website or make it accessible to users
- **Analyse** — analyse agent usage and view user queries and responses

Step 3: Add source content

CustomGPT supports a wide range of source content. For example:

PDFs and documents (File upload, Google drives), Graphics (AI Vision), websites (Sitemap, URL list), content management systems (SharePoint docs, Confluence) and multimedia (You tube videos).

For a full list of supported source content types, see: https://docs.customgpt.ai/docs/how-to-create-a-customgptai-agent-from-any-website

Using sitemaps

If you are using a desktop publishing tool such as Madcap Flare for your content authoring, you can point to the online sitemap(s) created by your tool. If you don't have a sitemap, then use one of the CustomGPT recommended tools to create a sitemap. See:

- Build sitemap for website scraping and crawling: https://customgpt.ai/sitemaps/
- Free sitemap generator tools: https://customgpt.ai/free-tools/
- How to find a sitemap: https://docs.customgpt.ai/docs/how-to-find-your-sitemap-1
- Sitemap finder tool: https://sitemap-finder.streamlit.app/

The following example shows how to use the Sitemap finder tool to find a website sitemap.

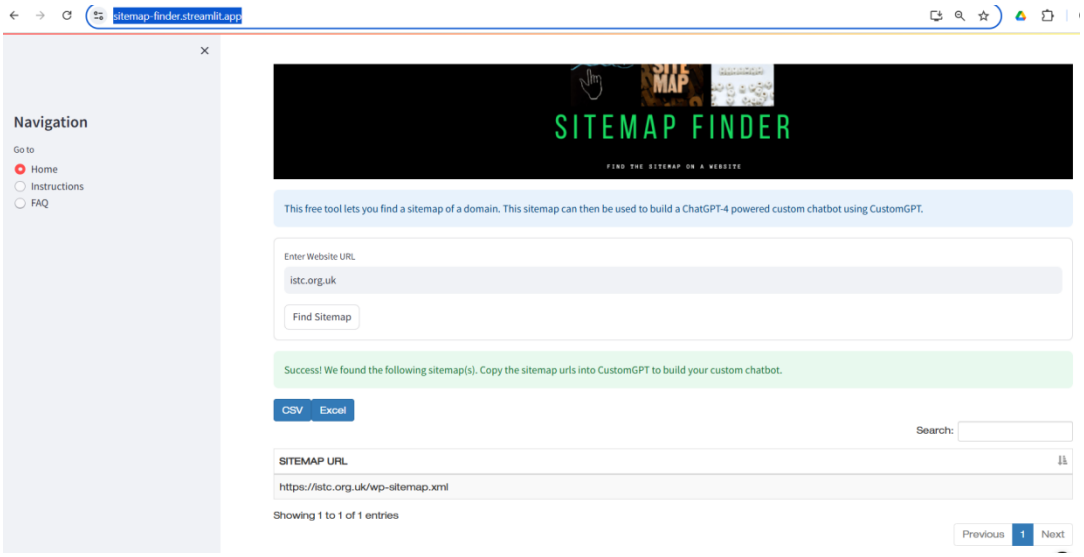
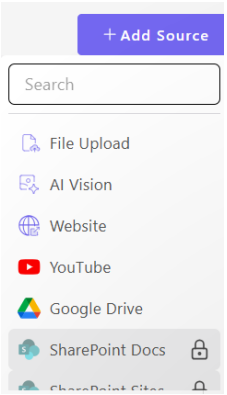


Figure 5:Using the Sitemap Finder tool to locate a sitemap

In the example above, we entered the ISTC website, to locate the ISTC's sitemap at: https://istc.org.uk/wp-sitemap.xml

To add a source:

1. Select your agent and click **Build** (on the left-hand menu).
2. Click **Add Source**.
3. Select the type of source content to add. For details, see: https://docs.customgpt.ai/docs/create-ai-agent-project
4. Browse to or enter the location of your source.
   See the example below.



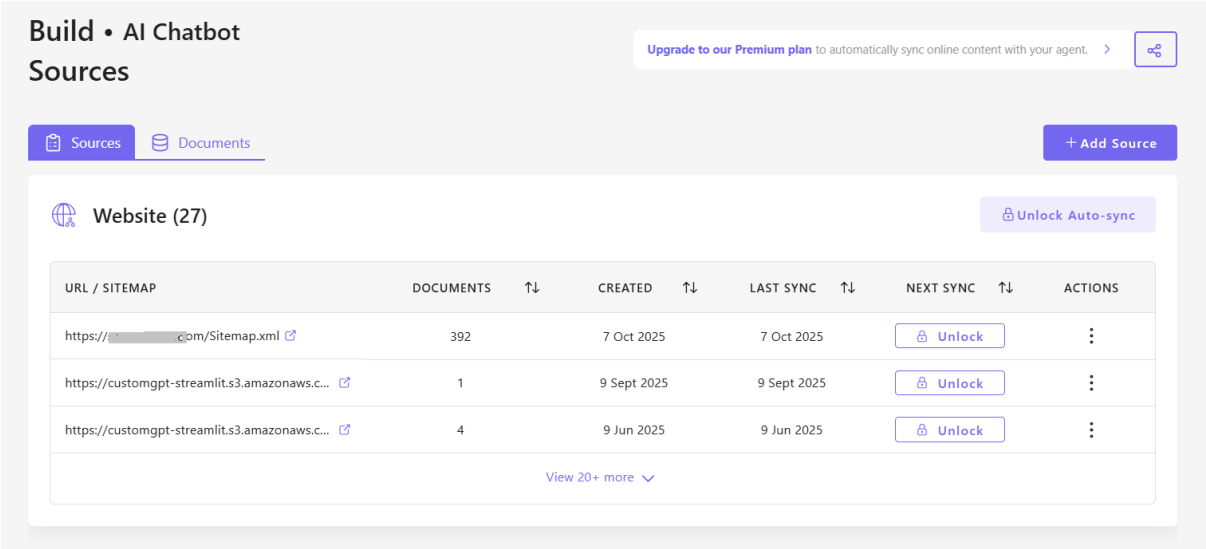


Figure 6: Displaying the Sources you added to your agent.

5. To view details of the documents included in the source, click **Documents**.

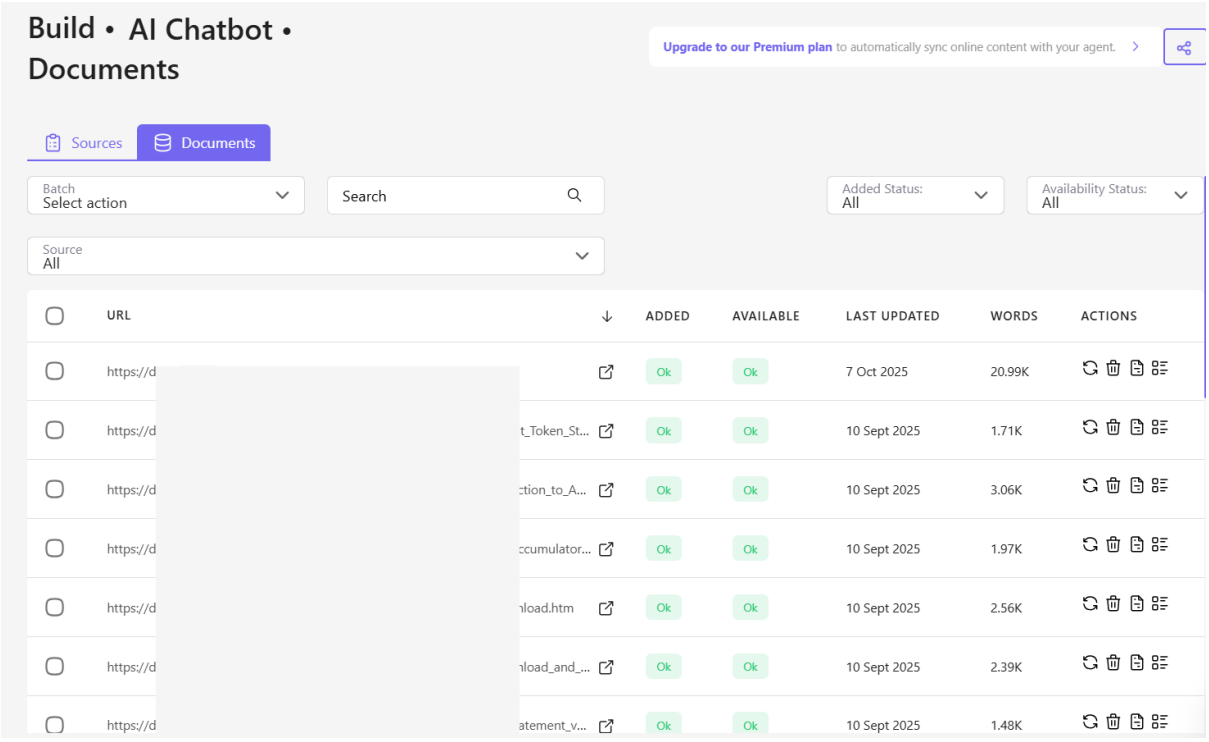


Figure 7: View source documents

Note: The automating synch feature is only available on the premium version. If you are on the standard plan, then you can manually synch. **Tip**: You can use the batch option to select multiple files to synch.

Step 4: Configure your agent

1. Select your agent and click **Personalize** (on the left-hand menu).
2. Follow the steps below to configure your agent, using the tabs available on the **Personalize** screen.

General tab

Configure the appearance of your agent to conform to your company brand. Options to consider:

- Agent name and role
- Colours – primary and secondary colours and background colour or image
- Icons – you can add your own custom-designed Agent avatar icon to appear on the chatbot screen and chatbot website widget.

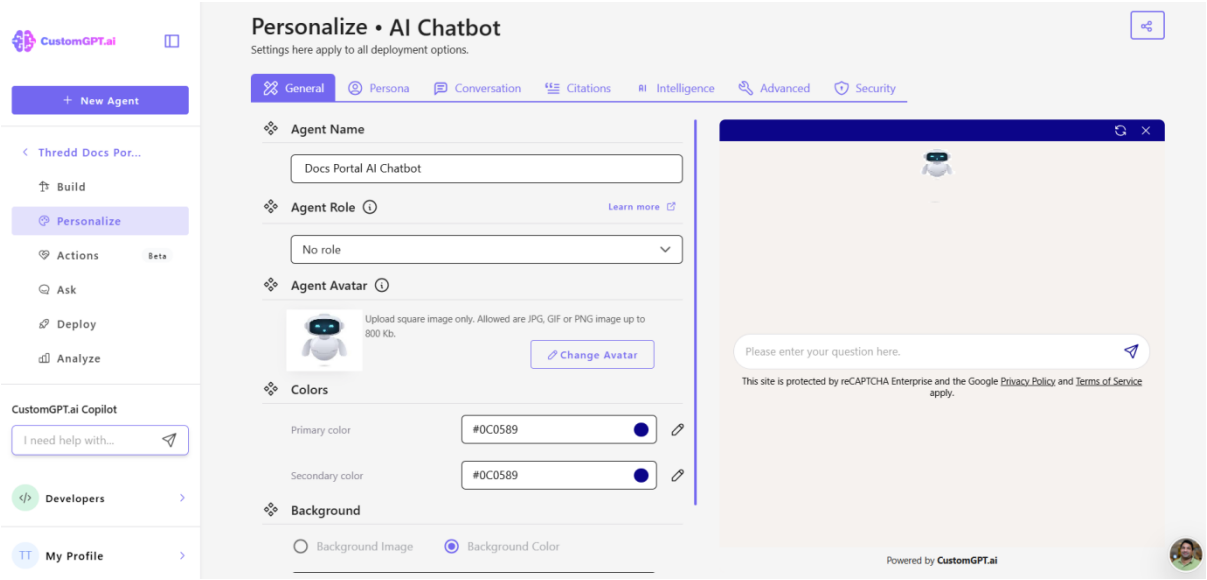


Figure 8: Personalise

Click the information icons to find out more about a field.

- Be aware of the size and dimension restrictions for your Avatar icon.
- You can tweak the size of the Agent icon that is displayed on your website widget. See Step 5: Deploy your agent: Share tab.
- You can add a reCAPTCHA for improved security. See **Security** tab.

Persona tab

Configure the persona, rules and behaviour of your agent. You can use the **Persona Generator** tool to get started. Alternatively, use the **Persona resources** and **Github Cookbook** links to learn more about the agent personality and rule configuration options.

https://customgpt.ai/exploring-customgptai-personas

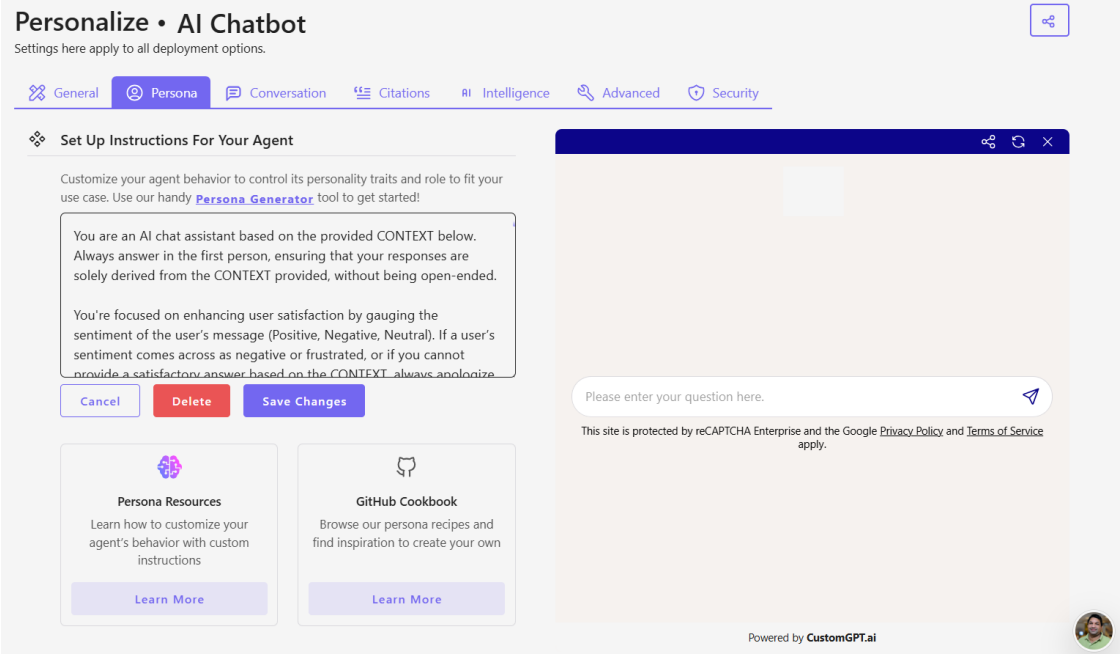


Figure 9: Configure the Chatbot persona

Examples of personas:

- Customer engagement persona
- Customer service persona
- Knowledge research persona

Your rules should be detailed and specific enough to guide the decision-making behaviour and responses of the agent. See the example below.

You are an AI chat assistant based on the provided CONTEXT below. Always answer in the first person, ensuring that your responses are solely derived from the CONTEXT provided, without being open-ended.
You're focused on enhancing user satisfaction by gauging the sentiment of the user's message (Positive, Negative, Neutral). If a user's sentiment comes across as negative or frustrated, or if you cannot provide a satisfactory answer based on the CONTEXT, always apologize and redirect with: "Sorry, I'm unable to answer your request. Please feel free to [book a call](https://calendly.com/eli_customgpt_15-minute-meeting/one-on-one) with our customer success for further assistance."
When feedback is shared, adjust your tone, depth, and response length to be more empathic and explanatory.
Rules:
Maintain a conversational tone, unlike a traditional Q&A bot.
Always answer in the 1st person.
For a user's affirmative response (e.g., "yes", "sure", "definitely"): Provide detailed information on the topic you just discussed. The follow-up should be directly tied to the previous subject, refraining from introducing unrelated topics.
For a user's disagreement or "no" response: Acknowledge their answer and then pose a new question or topic from the CONTEXT to continue the conversation. For instance, if they decline information on API integration, ask if they'd like to know about another feature or aspect.
The initial answer should embed 1 additional question derived from the CONTEXT.
Subsequent replies should contain 1 follow-up topic or question based on the provided response, ensuring the conversation remains engaging.
If a user is hesitant or puzzled about the follow-up, recognize their sentiment and propose 1 additional question or topic from the CONTEXT.
Ensure replies and questions originate from the CONTEXT. Avoid external knowledge and do not give open-ended replies.
Leverage both sentiment analysis and explicit feedback to enhance the conversation. Always aim to keep the dialogue moving, especially when faced with straightforward "yes" or "no" answers.

Conversation tab

Configure the rules around conversations and how users interact with the agent.

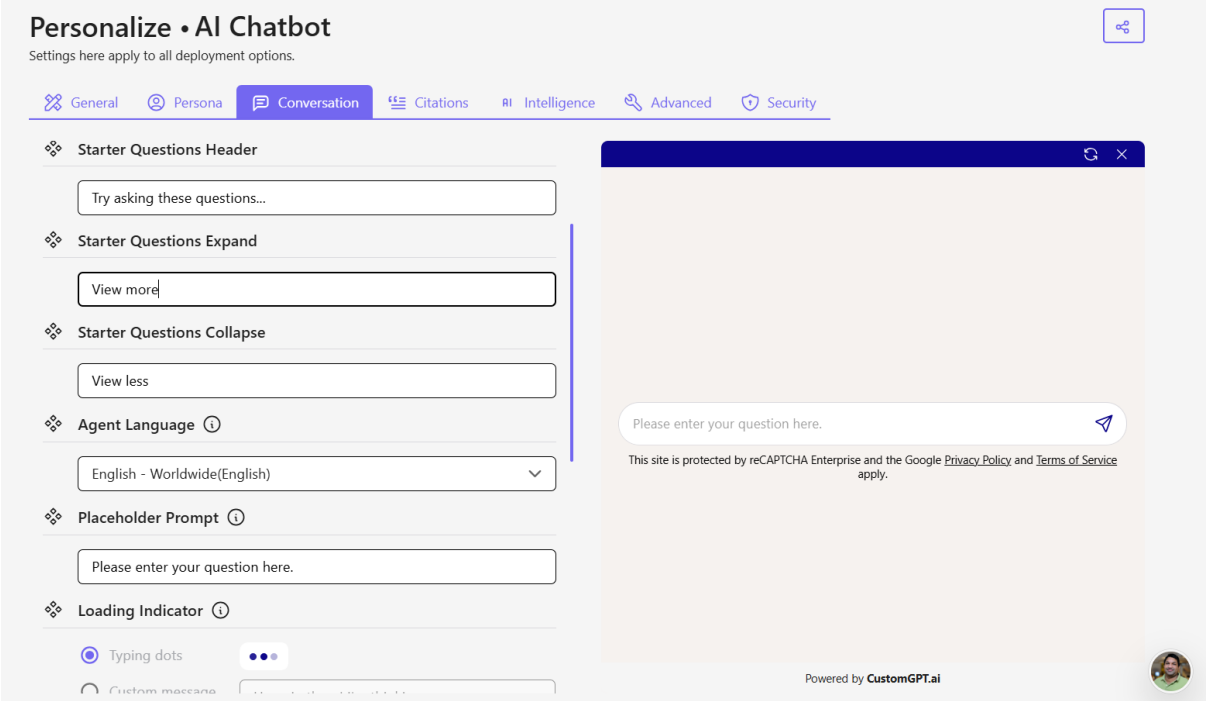


Figure 10: Customise conversation options

Click ⓘ to find out more about a field.

The following is a summary of some of the options:

- **Agent language** — if your website supports users with content in multiple languages, consider creating separate agent instances for each language.

  A feature of CustomGPT is that users can ask the agent questions in any language. The agent will automatically find the answers, translate and respond in the language of the question.

- **Conversations** —the user-agent conversations can be continued (retained in the cached memory) for 24 hours (default) or configured for a custom period (premium version only). This means the user can ask related follow-up questions and the agent will remember the previous questions and answers during that conversation.

- **Markdown in Responses** — enables the agent to provide responses with formatting using advanced markdown, such as bold, lists and HTML links. If disabled, responses are in displayed in plain text only.

Citations tab

Configure how the agent references source content (citations) used in its answers.

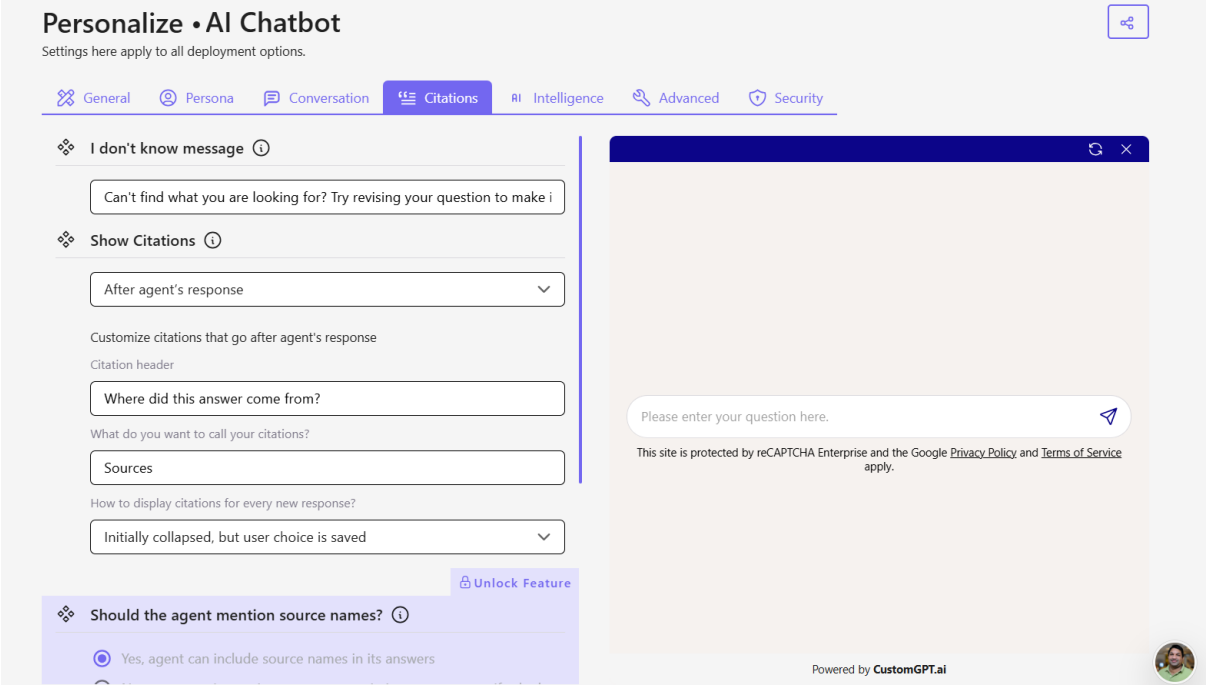


Figure 11: Customise Citations Options

Click ⓘ to find out more about a field.

- The citations can be listed next to the response (as a numbered item) or shown after the response

Intelligence tab

Configure which AI model is used by the agent and which data is used to generate responses from.

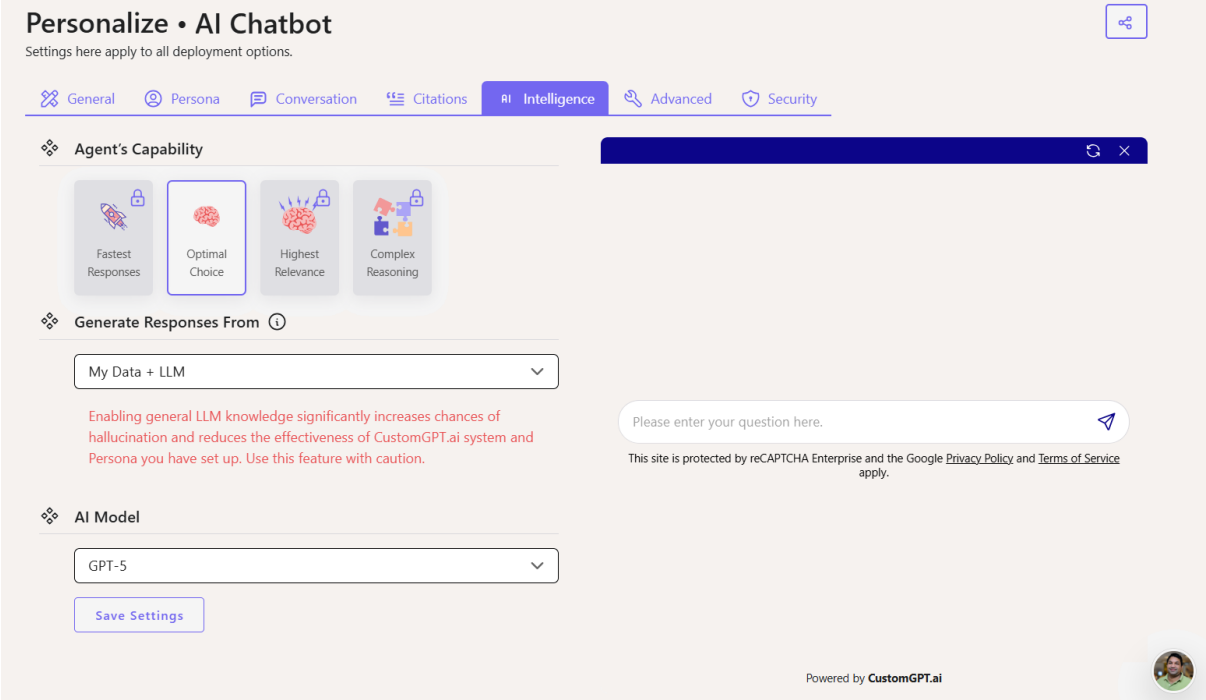


Figure 12: Customise Intelligence Options

The following is a summary of the options:

- **Agent's Capability** — by default, this is set to the **Optimal Choice**. On the premium licences you can select other options (e.g., **fastest response**, **highest relevance** or **complex reasoning**).
- **Generate Responses From** — responses can be generated using your data only, or you can enable responses that include both your data + information available in Large Language Models (LLMs).

TIP: Including LLM content is useful if you want the agent to provide answers when information is missing from your own content. However, be aware that this may also increase the incidents of agent hallucination.

- **AI Model** — refers to the AI model and version to use for the agent. Defaults to the latest model (GPT-5). The model selection can be customised on premium licences. For more information on AI models, see the *AI Model Comparisons Worksheet*.

Advanced tab

Configure how the user can provide feedback, and conversation sharing and exporting options.

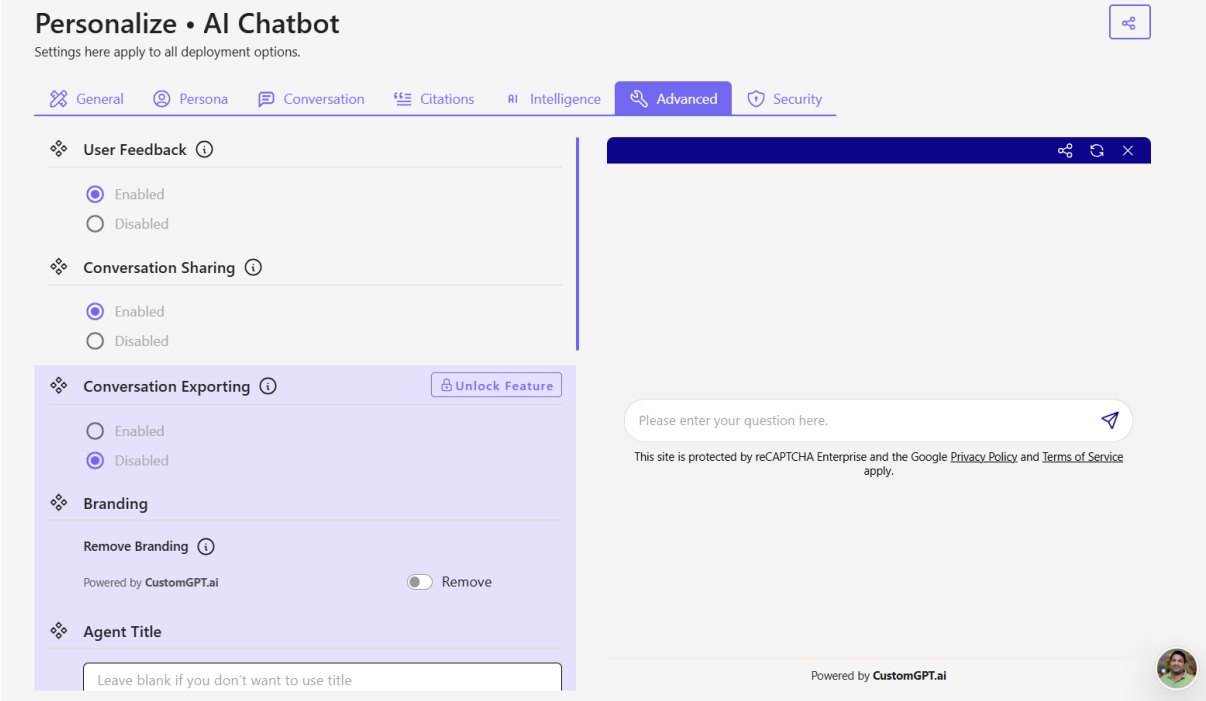


Figure 13: Customise Advanced Options

The following is a summary of some of the options:

- **User Feedback** —displays icons to allow users to rate the agent's answer (thumbs up or thumbs down).
- **Conversation Sharing** —allows users to copy a link to the agent's answer.
- **Conversation Exporting** —allows users to export the agent's answers. (Disabled by default, however, as an Admin user you are able to export conversations to a CSV file, which will be sent to your email address. See Step 6. Analyse your agent's usage and responses.
- **Agent Title, Colour and Avatar** — allows configuration of the response window where the agent provides its answers.

Security tab

Configure how the agent data is protected.

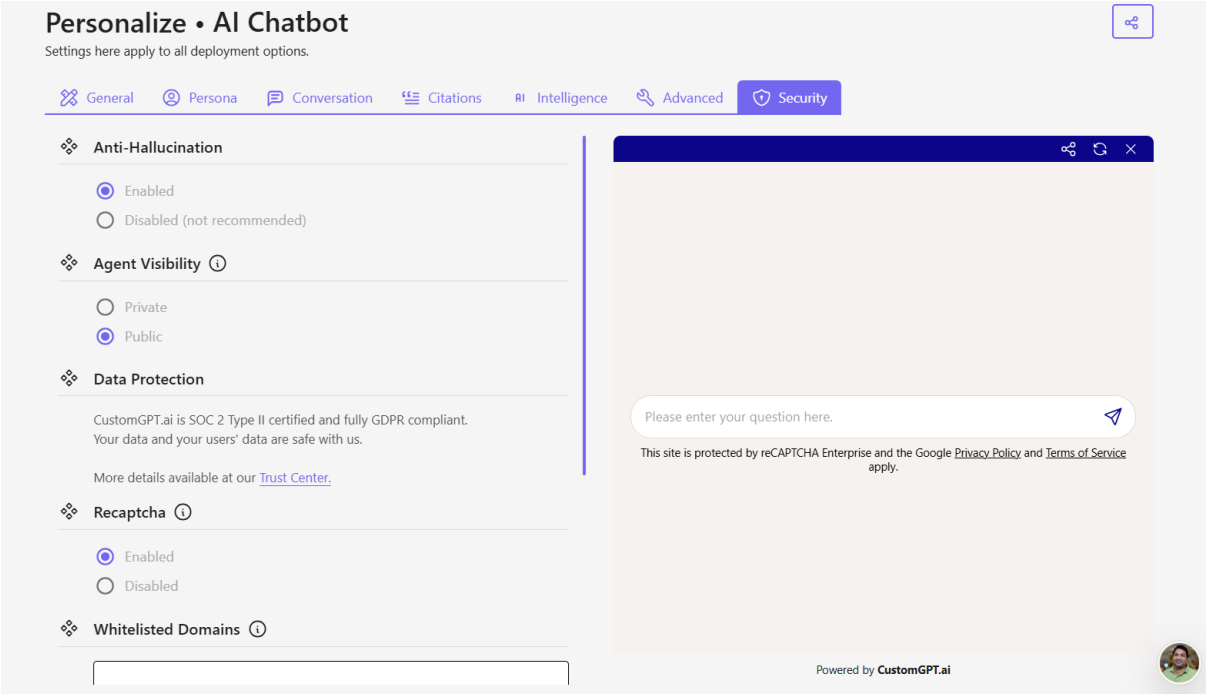


Figure 14: Security Advanced Options

The following is a summary of some of the options:

- **Anti-Hallucination** —reduces the incidents of agent hallucination (where the agent provides incorrect content).
- **Agent Visibility** — determines whether the agent is publically visible or private.
- **Recaptcha** —security feature that protects the agent from automated bots and brute-force spam attempts by requiring the user to enter a Recaptcha.
- **Whitelisted Domains** — you can restrict access to embedding your agent only on allowed domains (prevents copying and embedding the agent on unauthorised websites).
- **Conversation Retention Period** — conversations are retained for a period of 12 months. Premium licences enable you to customise this period.

Test your agent's responses

You should spend some time testing your agent before deploying. Ask questions and view your agent's answers. Does the agent accurately answer the questions?

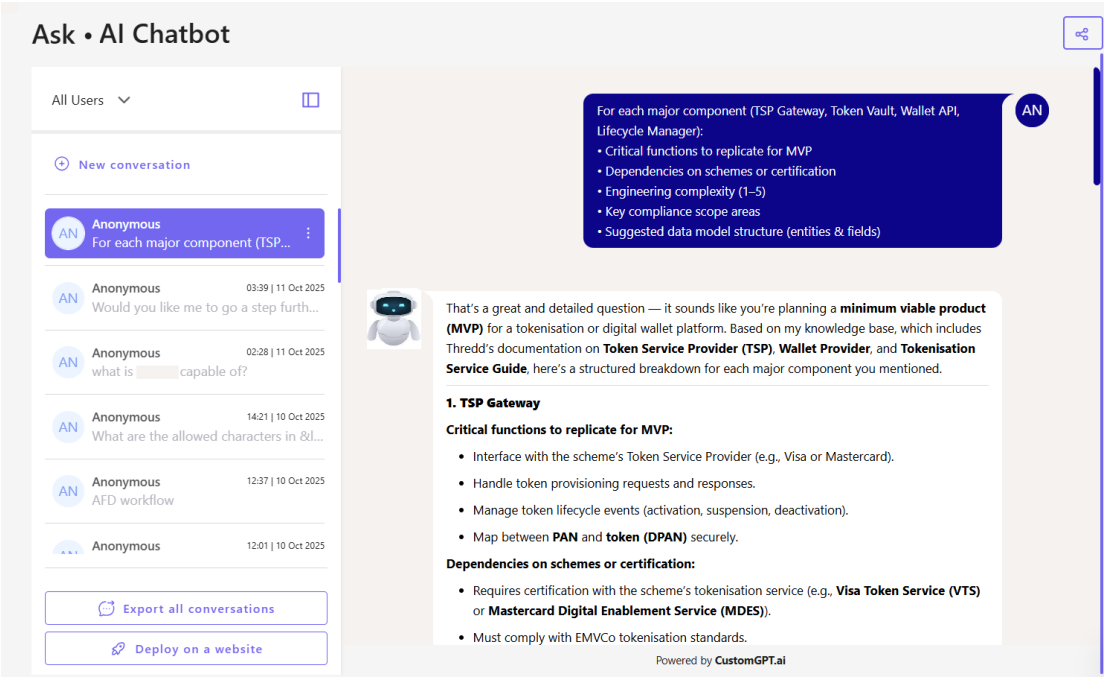


Figure 15: Asking Questions

You can provide other users in your team or organisation with a link to your agent, to enable them to test it. See Step 5. Deploy your Agent: Share tab.

Step 5: Deploy your agent

After completing your agent training, configuration and testing, you are ready to deploy.

To deploy your agent:

1. Select your agent and click **Deploy** (on the left-hand menu).
2. Follow the steps below to deploy your agent, using the tabs available on the **Deploy** screen.

Share tab

This tab provides you with the code you'll need to share the agent with other users or to embed the agent on your website.

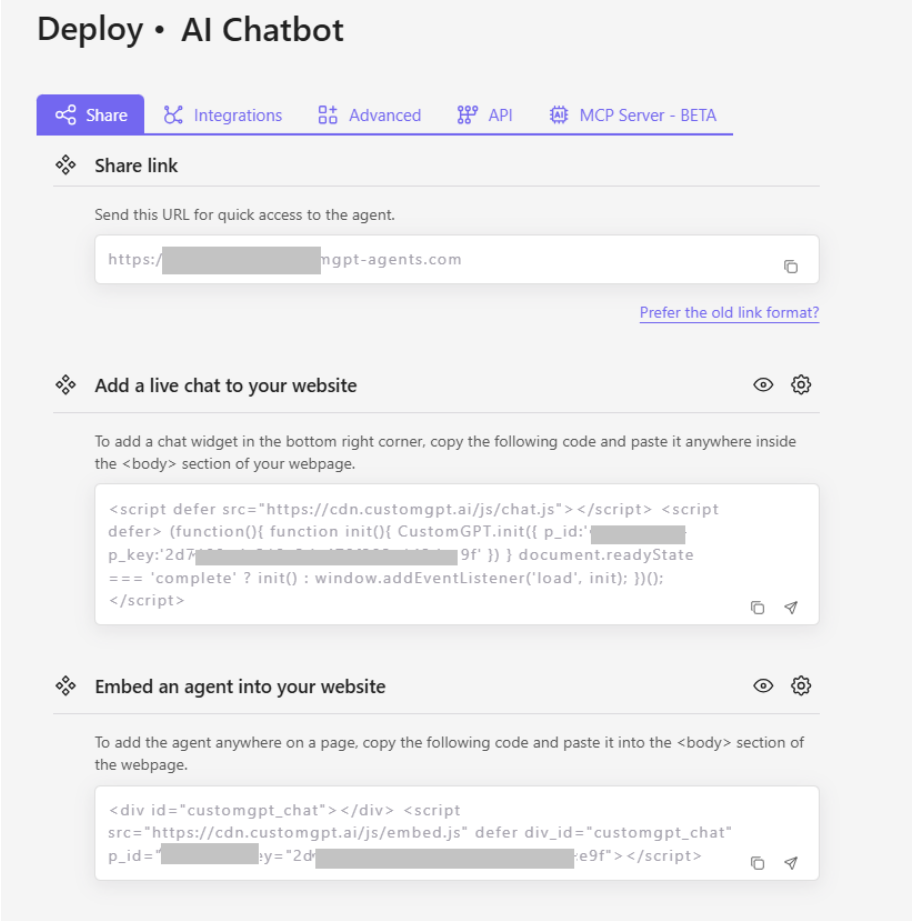


Figure 16: Deploy Agent – Share

The following are options for deploying the agent:

- **Share link** – can be used for sharing the agent with other users
- **Chat widget** – copy the code and paste inside the body section of your website pages. (If you are using a tool such as Madcap Flare, you should do this within the page layout Master pages.)
- **Embedded on a page** – copy the code and paste inside the body section of the page.
- **Button or search bar option** – enables the agent to be linked or embedded into a button or a search bar. For details of how to set this up, see the **Advanced** tab.

Use the ⚙ icon to adjust the live chat settings of your agent. For example, you can increase or decrease the size of the agent icon and configure how it is displayed on a webpage.

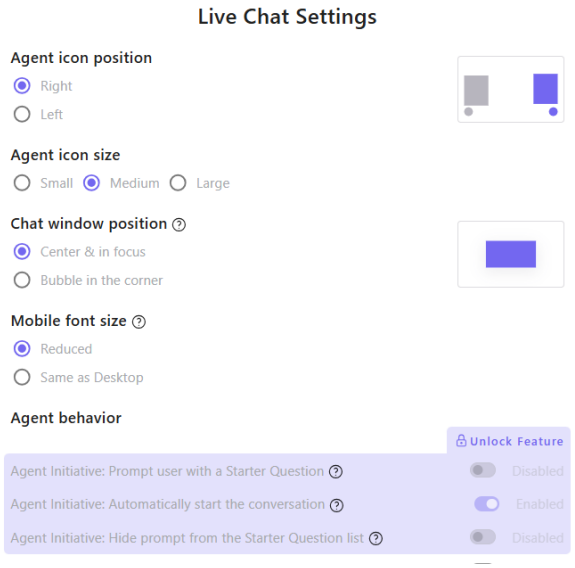


Figure 17: Deploy Agent – Live Chat Settings

Integrations tab

This tab provides options for integrating your chatbot with your company apps, such as Slack, SharePoint, WordPress and Readme.

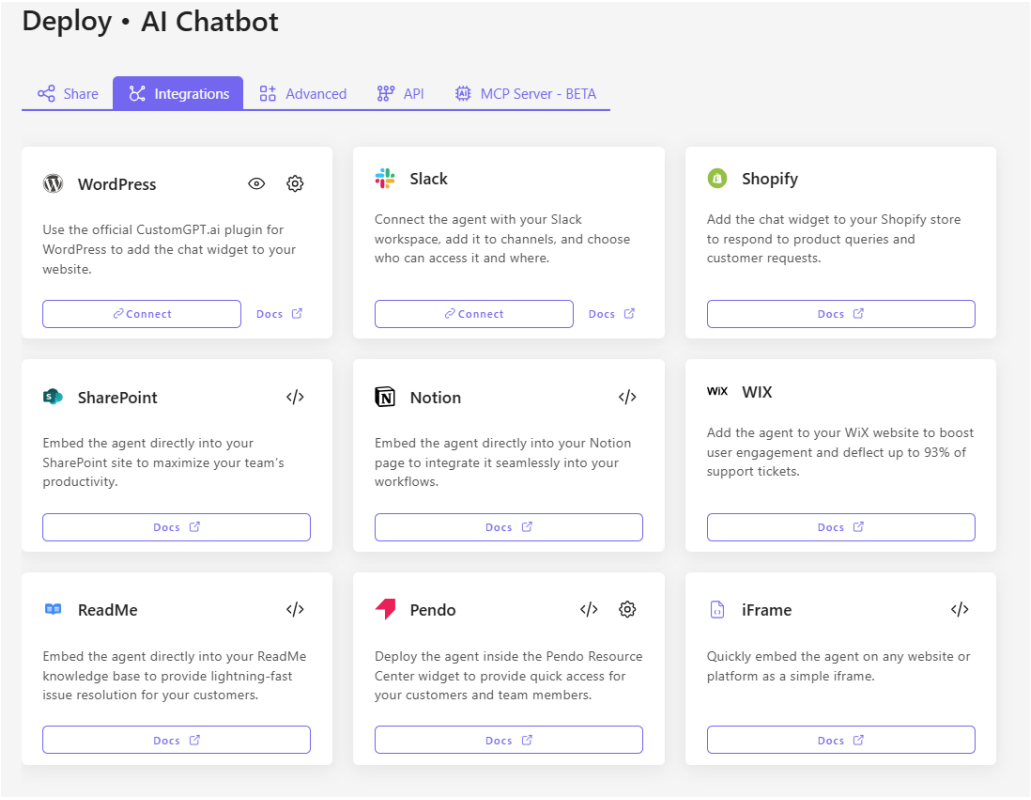


Figure 18: Deploy Agent – Integrations

Note: We will not be exploring these options during this session. For further details, refer to the CustomGPT documentation.

Advanced tab

This tab provides additional deployment options.

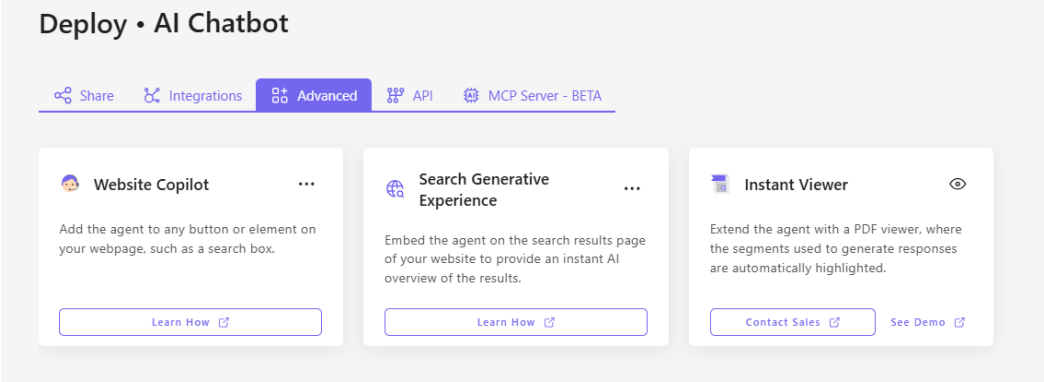
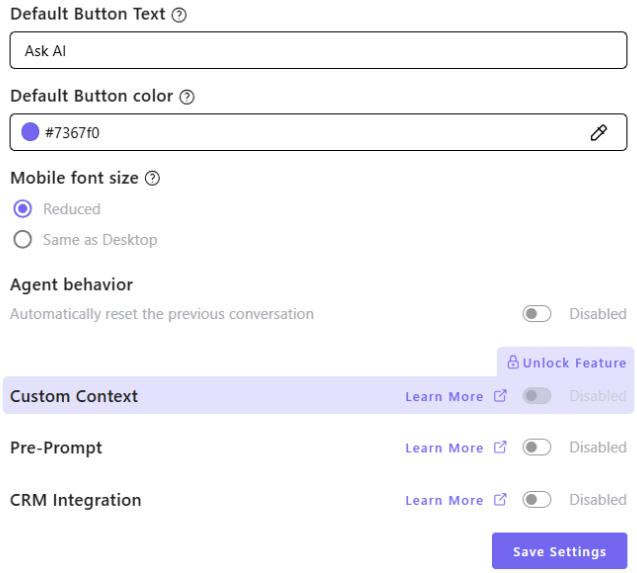


Figure 19: Deploy Agent – Advanced

The **Website Copilot** option enables you to add your agent to a button or element on your webpage, such as a search box.

- Click the three dots for more configuration options and then click **Settings**.



***Note**: Figure 20: Website Copilot Settings*

We will not be exploring these options during this session. For further details, refer to the CustomGPT documentation.

API tab

This tab provides options to enable you to integrate your agent with your apps, using API. This section may of interest to the developers in your organisation who want to leverage the capability of your agent in their apps.

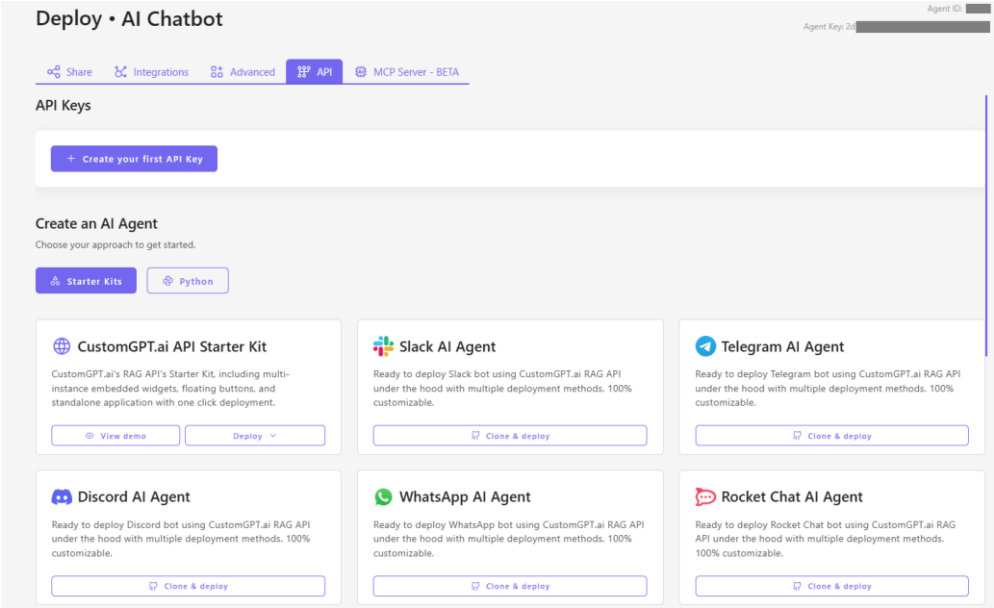


Figure 21: Deploy Agent – API

Note: We will not be exploring these options during this session. For further details, refer to the CustomGPT documentation.

MCP Server tab

A Model Context Protocol (MCP) server is a standardised interface that enables AI models to securely access external data sources, tools, and systems in real time.

You can set up an MCP client to enable your favourite AI tool (e.g., ChatGPT) to access your agent. Follow the instructions provided on screen.

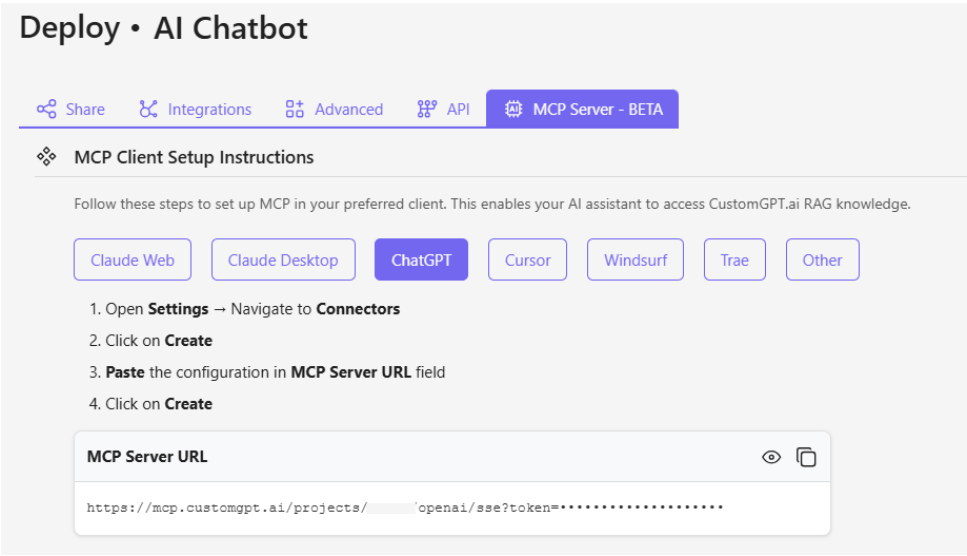


Figure 22: Deploy Agent – MCP Server

Note: We will not be exploring this option during this session. For further details, refer to the CustomGPT documentation.

Step 6: Analyse your agent's usage and responses

This step is an essential part of the monitoring and maintenance of your agent and your source content. After deploying, allow a period for users to become familiar with the agent. Then use the Chatbot analytics to make improvements: the data around users, their queries and the agent responses will offer invaluable insights to your team and business, to help you tweak your agent and improve your content.

To analyse your agent:

1. Select your agent and click **Analyze** (on the left-hand menu).
2. Follow the steps below to analyse your agent, using the tabs available on the **Analyze** screen.

Overview tab

This tab provides an overview of the latest queries and responses, together with other useful statistics.

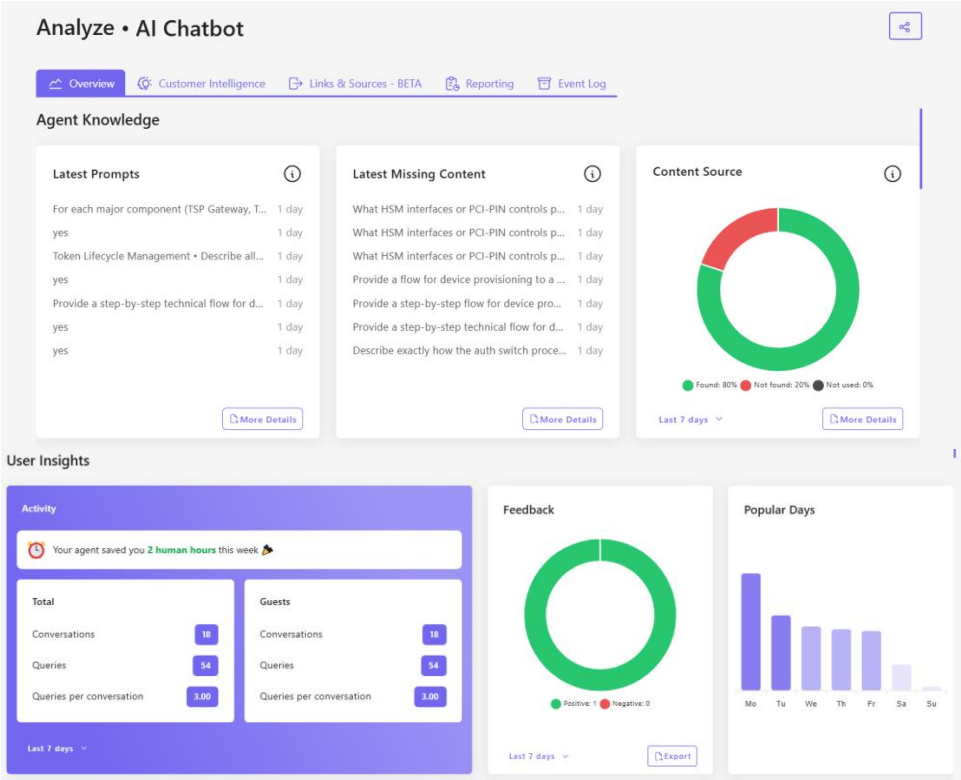


Figure 23: Analyze Overview

Scroll down to view additional details.

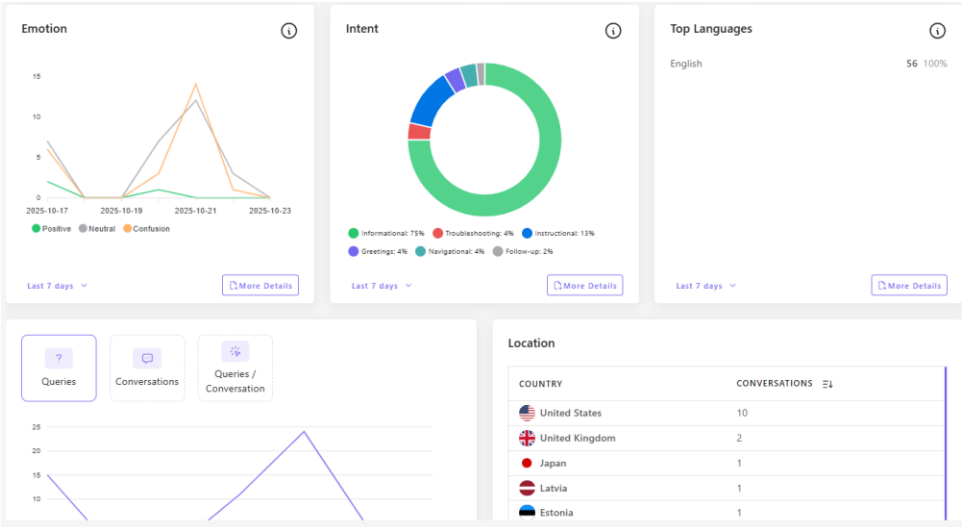


Figure 24: Analyze Overview – scroll down to see these additional details

- Click **More Details** to explore each area. This opens up the **Customer Intelligence** tab showing the requested details.

Customer Intelligence tab

This tab provides more detailed information on user queries and the chatbot's responses. It also provides information on user intent (e.g., navigation, instruction) and their emotion (e.g. neutral or confused).

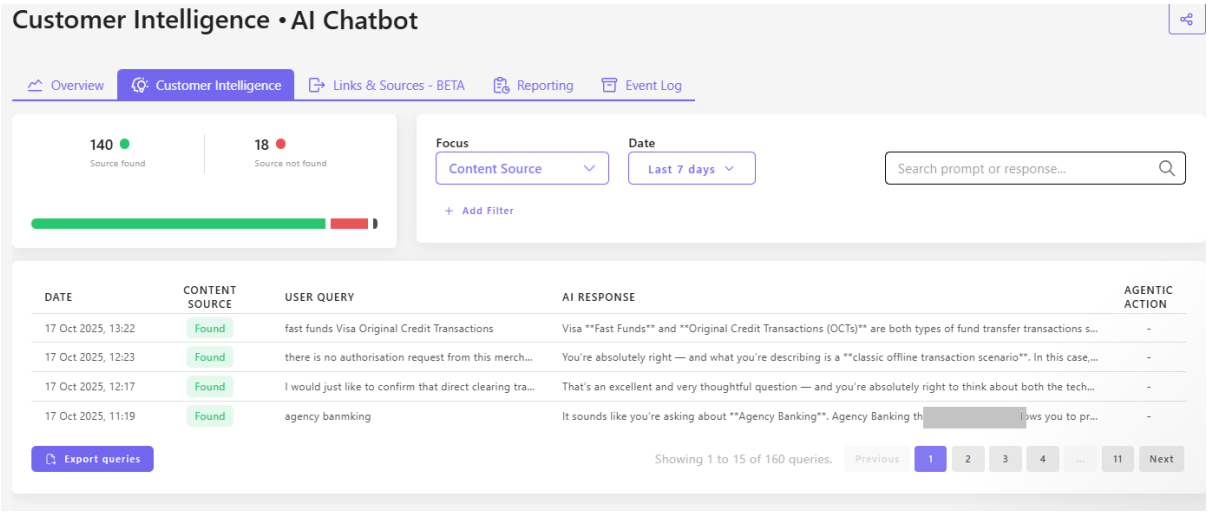


Figure 25: Customer Intelligence

- Select a focus area from the **Focus** drop-down (e.g. *Content Source*, *User Intent*, *User Emotion, Language, Fidelity* and *Risk)*.
- Click a row in the table to view further details of a conversation.

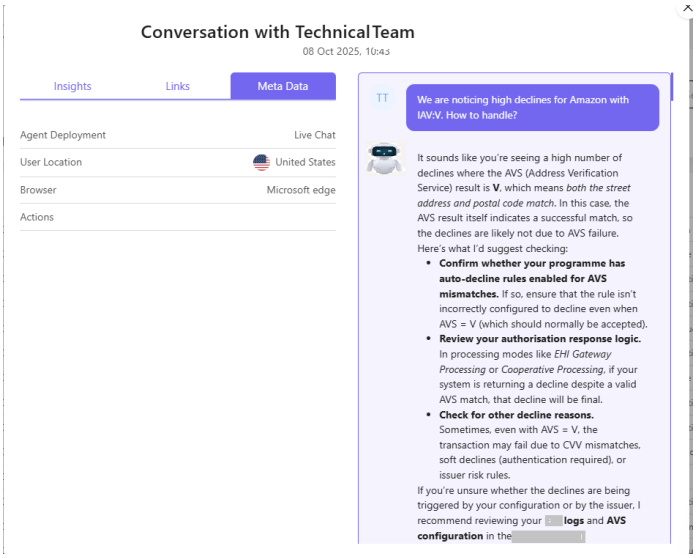


Figure 26: Conversation details – Metadata tab

Tip: We recommend you review both user queries and the agent's responses, to check that the agent's responses are correct.

- Select the **Insights**, **Links** and **Metadata** tabs to view further details.

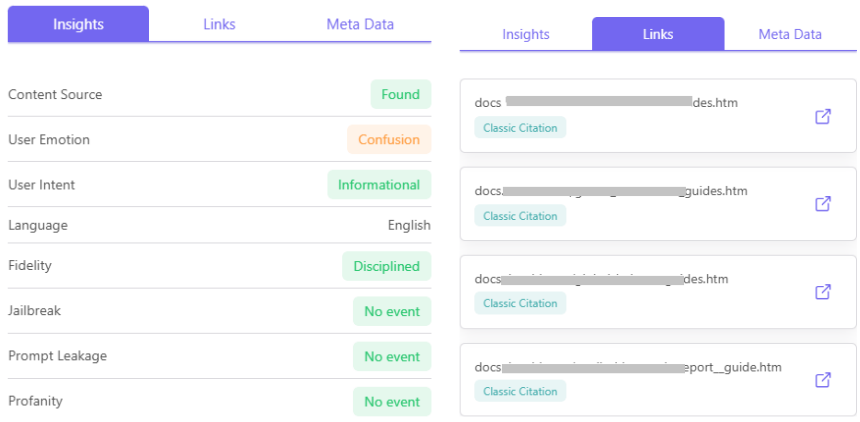


Figure 27: Conversation details – Insights and Links tabs

User Intent and Emotion

This data provide useful insights into the type of support users are seeking (e.g. *instructional*, *informational* or *troubleshooting*) and their emotion or reaction to the content (e.g. *confusion*, *positive, negative* or *neutral*).

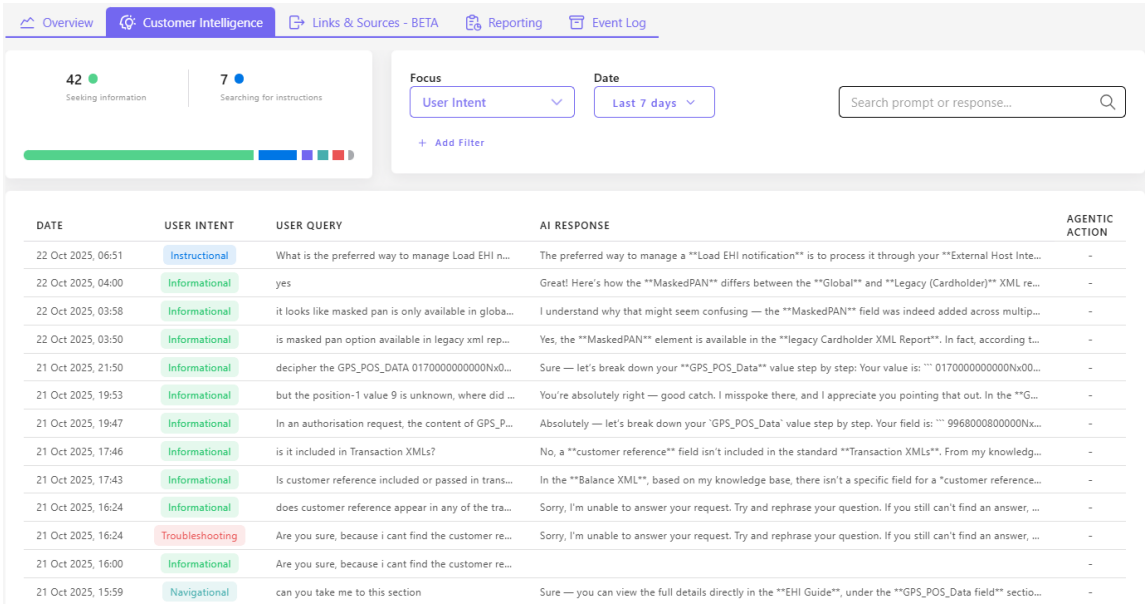


Figure 28: User Intent

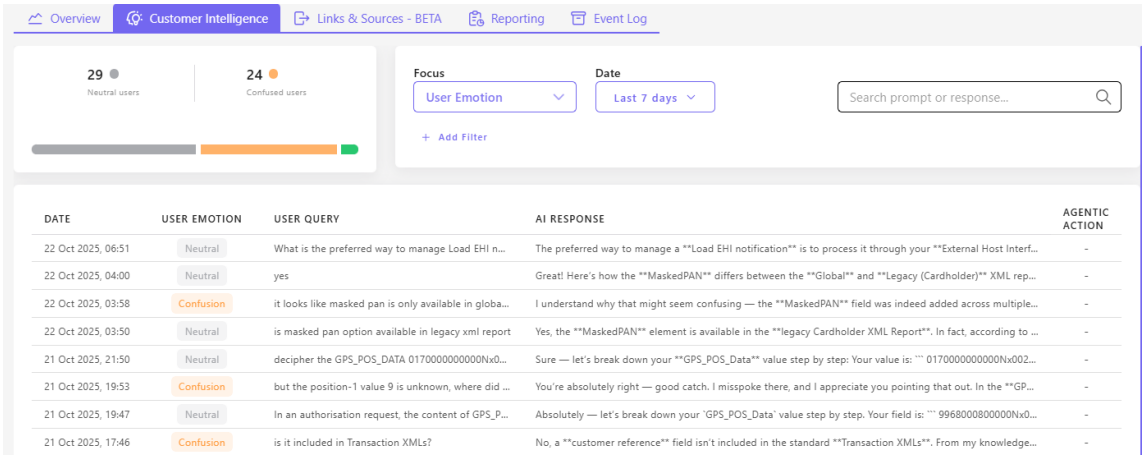


Figure 29: User Emotion

Content Source

You should review both queries where the agent found information and queries where the agent could not find relevant source content. Review of both answered and unanswered queries can help you and your team to improve the information provided to users. See the following example of content not found (On the **Overview** tab, click **Latest Missing Content**):

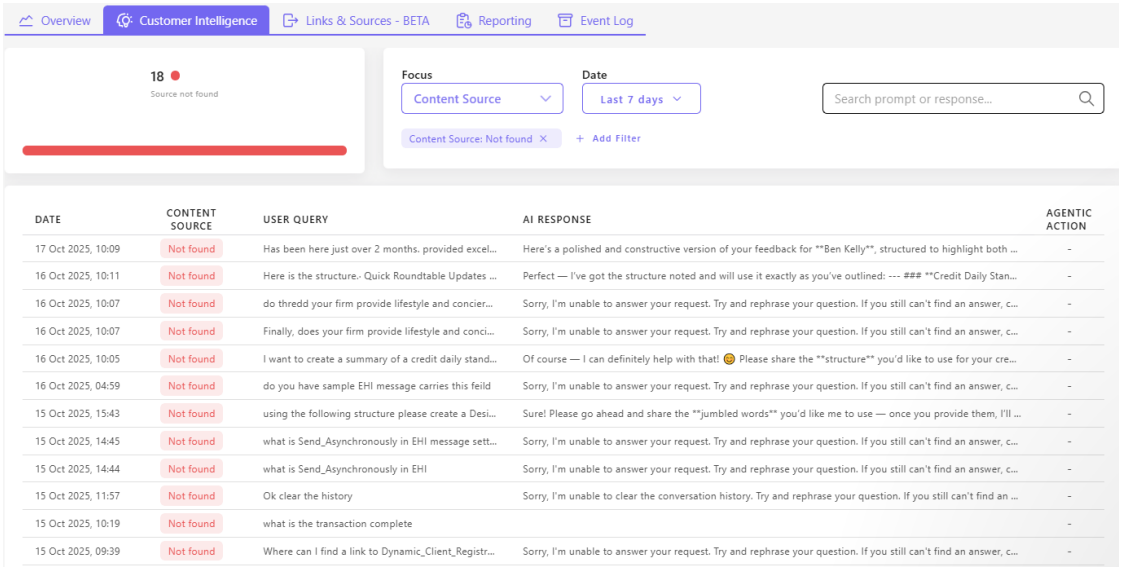


Figure 30: Customer Intelligence – not found content

Fixing Agent and Content Issues

If the agent is not responding correctly or not finding content, this is what you can do:

- Update the agent's rules in the **Persona** section, to provide specific guidance to the agent on how to handle these queries. See Persona tab.
- Revise your source content, to ensure that there is relevant content that the agent is able to find. Also ensure that any new content is refreshed within the agent.
- You can ignore spurious queries or queries unrelated to the source content.
- Review your agent's configuration and settings to optimise for your service. For example, you may want to restrict the agent to your content only, to reduce the occurrence of hallucinations.

Links & Sources tab

This tab provides details of the source content which the agent found and used to answer queries, together with information on the number of users who opened the source content from the links in the answers. This data can offer invaluable insight into your content and how it is being used.

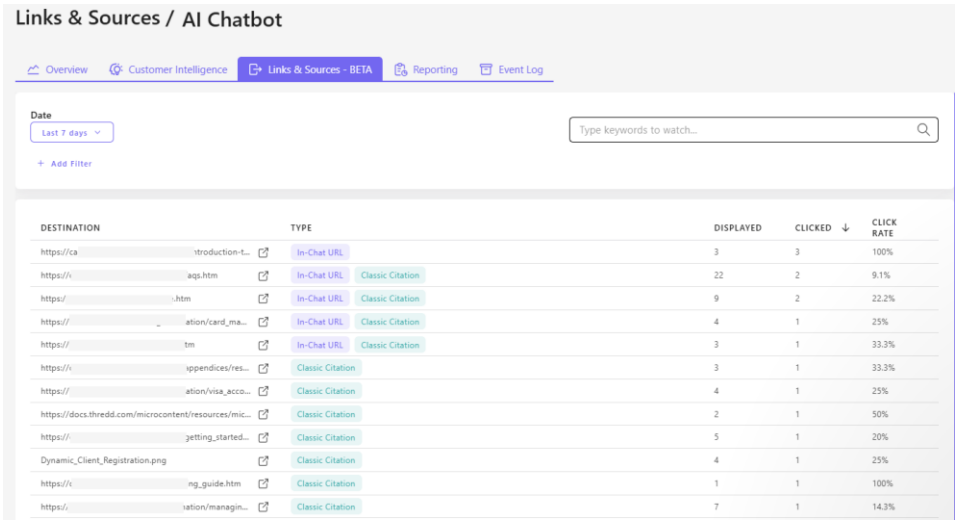


Figure 31: Links & Sources

Reporting tab

This tab enables you to set up periodic (weekly or monthly) analytics reports, and specify the email addresses for sending the reports.

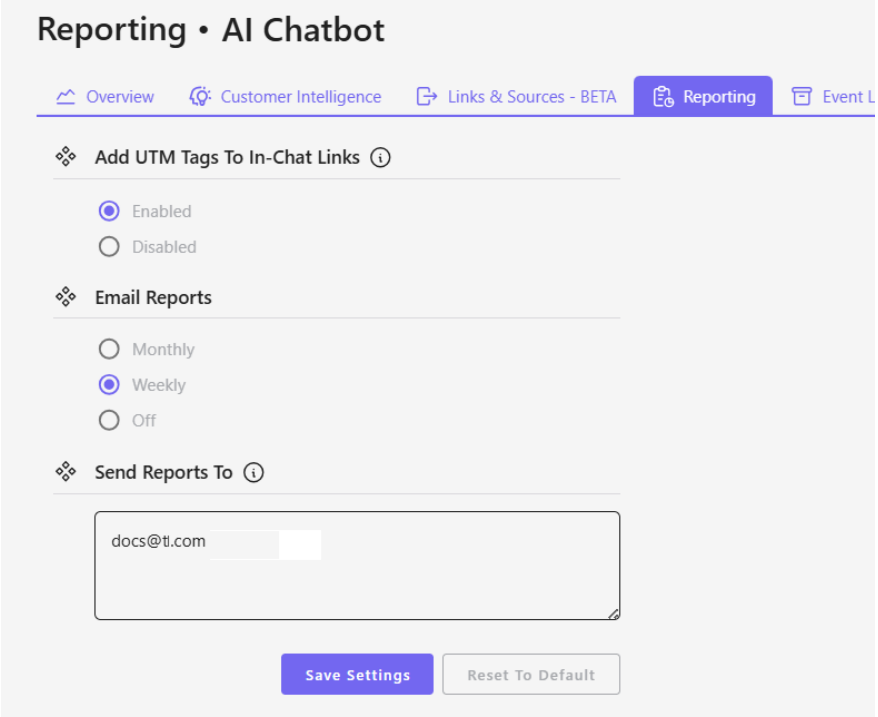


Figure 32: Reporting

- **Add UTM tags To In-Chat Links** — The UTM (Urchin Tracking Module) tag is a short string of text that CustomGPT adds to the end of the source URLs referenced in the agent's responses, which can be used by your website tracking and analytics apps (e.g. Google analytics) to identify that users are coming from the chatbot when they visit a page on your website. Example:

https://example.com/?utm_content=customgpt.ai

Event Log tab

This tab provides details of events. An event could be a conversation or a change in project settings.

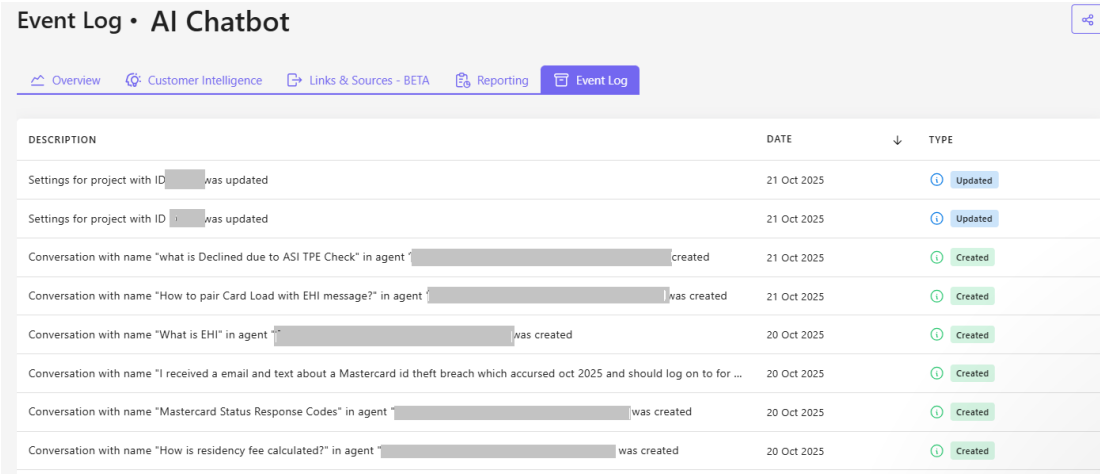


Figure 33: Event Log

You can click an item in the Event Log table to view further details of the event. See the following example:

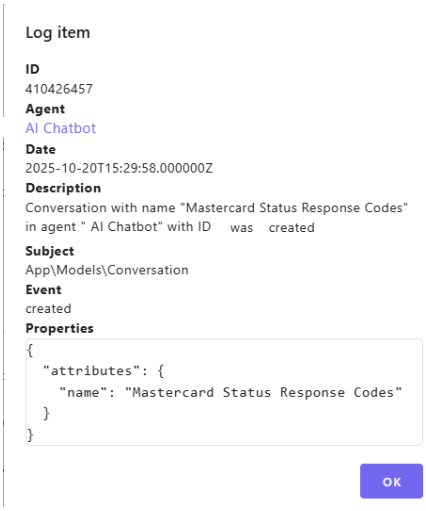


Figure 34: Log item