



# Set up AI chatbot

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To set up your AI chatbot, you'll:

## Personalize the chatbot responses

Our AI chatbot is basically an AI Agent that uses your knowledge base as its source material.

Before you [Enable AI chatbot widget for my knowledge base](#), use the **Personalize the chatbot responses** section to help refine your chatbot's tone and context:

1. Go to **KB settings > AI chatbot**. The AI chatbot page opens.
2. In the **Personalize the chatbot responses** section, follow the prompts to add context and personality to your chatbot:
  - a. Enter a description of your chatbot's tone and personality in the **Tone of voice** field, max of 200 characters. This can determine how formal or informal, friendly or professional your chatbot's responses are. For example, for the chatbot in our Support KB, we use "friendly and helpful, uses occasional owl puns". ☒
  - b. Enter some context about your organization or audience in the **Finish this sentence: "You are a chatbot answering questions for..."** field, max of 200 characters. Include your organization's name and some information about its products or its intended audience. For example, for the chatbot in our Support KB, we use "KnowledgeOwl, a company that makes B2B knowledge base software."
3. Be sure to **Save** your changes.

## Customize default text for AI chatbot

Make the AI chatbot your own. Customize or translate the wording it uses, such as the button label, AI disclaimer, intro text, and more.

Use this text customization to better match your knowledge base's tone or to translate the chatbot interface into another language.

Refer to [Customize AI chatbot text](#) for full instructions and descriptions of the various text strings you can edit.



### Only use plain text and emojis

Customized default text can only contain plain text and emojis. If you try to enter HTML tags, we'll strip them out on-save.

## Restrict access to the AI chatbot

Want to test the chatbot for a bit before releasing it to the world? Use the **Reader access** section in **KB settings > AI chatbot** to control who can see and use the AI chatbot in your knowledge base.

Choose from one of these options:

1. **All readers (default):** Use this option if you want everyone who can view your knowledge base to view and use the chatbot.
2. **Authors only:** Use this option if you want only logged-in authors to view and use the chatbot. This option can be especially useful if you want to test the chatbot without showing it to your readers.
3. **Specific reader groups:** Use this option if you want only members of certain reader groups to view and use the chatbot. Only readers assigned to these groups will see the chatbot button and be able to interact with it. This option can be especially useful if you want to share the chatbot only with certain groups, like internal teams or premium customers.



### AI chatbot respects reader group permissions

The chatbot will only use articles that the current reader has permission to view in its responses, no matter what **Reader access** selection you make.

## Enable AI chatbot widget for my knowledge base

The AI chatbot is turned on by default on new accounts; existing accounts must opt in to use the AI chatbot in your knowledge base.

To turn the chatbot on or off,:

1. Go to **KB settings > AI chatbot**. The AI chatbot settings page opens.
2. Be sure you've already followed the instructions to [Personalize the chatbot responses](#).
3. Turn on the **Enable AI chatbot widget for my knowledge base** control.
4. **Save your changes**.

The AI chatbot will now appear in the lower right of all knowledge base pages!

## I can't turn on the AI chatbot

If you can't flip the toggle to turn the AI chatbot on, you should see a message with text like this:

Semantic search must be enabled before you can turn on the AI chatbot. [Go to search settings](#) to enable it, then re-index your knowledge base.

If you see this message, your knowledge base doesn't have semantic search turned on. Follow the instructions to [enable semantic search](#) and perform a [reindex](#). Then you should be able to turn the chatbot on.

## Optimize your content for the chatbot

While it isn't necessary to turn on the AI chatbot, you may need to review your content and update some of its structure to get the best performance out of the chatbot.

Refer to [How to optimize your content for the AI chatbot](#) for a list of content best practices that can help improve your chatbot's performance.

## Add custom response rules

Custom response rules let you define a pre-written response that the chatbot delivers when a reader's message matches a keyword or AI-detected intent, bypassing normal AI search. Use them to handle queries that fall outside your knowledge base, like routing live chat requests, catching troubleshooting queries, or redirecting out-of-scope questions.

To add a custom response rule:

1. Go to **KB settings > AI chatbot**. The AI chatbot settings page opens.
2. Scroll to the **Custom response rules** section and select **Add rule**. The Add rule modal opens.
3. Enter a name for the rule in the **Rule title** field.
4. Select a **Rule type** and make other selections to set up the trigger:
  - a. **Keyword match:** Use this rule type to match on specific words or phrases. This works well if you know exactly what you want to trigger the custom rule.
    - i. Select a **Match type:** **Contains** (phrase appears anywhere in the message) or **Exact** (message must equal the phrase exactly, case-insensitive).
    - ii. Enter one or more trigger phrases in the **Phrases** field.
    - iii. Select **+ Add phrase** to add additional phrases.
  - b. **AI intent: phrase:** Use this rule type to trigger the custom response using variations on a phrase without having to manually enter each of them. You enter the phrase and our AI will determine the intent of the phrase and trigger when a reader enters a phrase with similar intent, even if it's worded differently.

- i. Enter one or more phrases in the **Phrases** field.
  - ii. Select **+ Add phrase** to add additional phrases.
- c. **AI intent: scenario:** Use this rule type to describe a scenario that should trigger the custom response in plain language. The AI matches messages that fit the described situation.
  - i. Enter a description in everyday language of the scenario in the **Scenario description** field. Be as specific as possible: a more detailed description reduces the chance of false matches.
5. Enter your pre-written response in the **Response message** editor. The editor supports basic formatting including bold, italic, underline, lists, and links.
6. *Optional:* Use the **Call-to-action** options if you want to add a call-to-action button to the response:
  - a. **None (default):** No button is shown.
  - b. **Link:** Displays a button that takes the reader to a URL. Enter a **Label** for the button and the destination **URL**.
  - c. **Developer event:** Fires a `ko-ai-chatbot:cta-click` **postMessage** event when a reader clicks the button. Enter a **Label** and an **Event ID**. Refer to the [AI chatbot JavaScript API Reference](#) for listener setup examples.
7. Select **Add rule** to save. The rule is added to the **Custom response rules** list.



#### Rule processing order

Rules are processed in this order: keyword rules first, then AI intent rules. The first matching rule wins, so order matters. Use the up and down arrows in the **Actions** column to reorder your rules.

### Edit or delete a custom response rule

Each rule in the **Custom response rules** list has action buttons in the **Actions** column:

- To **edit** a rule, select the pencil icon. The Edit response rule modal opens with all fields pre-populated. Make your changes and click **Save rule**.
- To **delete** a rule, select the trash icon. A confirmation dialog names the specific rule and asks you to confirm before permanently removing it.
- To **reorder** rules, use the up and down arrow buttons. Remember that the first matching rule wins, so put your most specific rules near the top.