

Sérgio's Guide — your website's assistant

This guide is for anyone who has just hired **Sérgio**, the virtual assistant that chats with people who visit **your website**, through the little chat bubble in the corner of the screen. It goes from start to finish: setting Sérgio up, putting the bubble on your site, teaching him about your business, **setting up your team's schedule** and seeing who's close to buying. You don't need any tech skills — every step names the exact button.

The screenshots are real, taken in the panel of a sample company (*Casa Modelo Reformas & Materiais*). The sample company is Brazilian, so the texts it wrote itself show up in Portuguese; in your account you'll see your own.

Never been in the panel? Read the [Getting started](#) chapter first: it shows how to sign in, how the screen is organized and how to find modules in the menu.

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1. What Sérgio does for you

People who visit your site have a question and little patience. With no answer right away, they close the page. Sérgio chats with them **right away, at any time**. He:

- **answers questions** with what you taught him (services, prices, the area you cover);
- **understands audio and photos** the visitor sends through the bubble;
- **asks the right questions** and **asks for contact details** (name, WhatsApp, email) so you can follow up;

- **books the visit** with whoever on your team can go, right in the website bubble (part 6);
- **alerts you** when the visitor asks to talk to a person;
- **scores each visitor** by buying intent, so you know who's hottest.

What he does **not** do: make up prices you didn't teach him or pretend to be human. When he doesn't know, he says so honestly.

2. Before you start

What	Why
Your own panel login	You set everything up with it — and, if you use Google Calendar, it's the signed-in person's account that gets connected.
Access to your website (or to whoever runs it)	To paste the bubble's code, just once.
Who does the visits (name and, if you like, each person's phone)	It's the team Sérgio spreads the visits across. A Google account is optional.
Your price list and list of services	It's what Sérgio uses to answer.

3. Step 1 — Tell him who he is

Where: Home → **Your apps** → **Site AI** (at the top of the screen it shows as *AI Website Support*) → **Settings** tab.


Identity

AGENT NAME

ROLE (PERSONA)

TONE OF VOICE


Messages

GREETING (FIRST MESSAGE)

AFTER-HOURS MESSAGE

SPECIFIC INSTRUCTIONS (OPTIONAL)

☒ Sérgio active (replies in the site widget)

Field	What to enter
Agent name	The name the visitor sees. Keep "Sérgio" or change it.
Role (persona)	If you sell services, SDR — Qualify leads and book meetings .
Tone of voice	Casual and friendly works well for most.
Greeting	The bubble's first line. E.g. <i>"Hi! I'm Sérgio from Casa Modelo. Want a quote?"</i>
After-hours message	What he says outside the hours you set.
Specific instructions	Your house rules, in plain sentences.
Sérgio active	Keep it checked. Unchecked, he stops answering on your site.

Right below are **Business hours** and **Qualifying questions** — the same as Ava's:

🕒 **Business hours**

Check the days your company is open. The assistant uses this to know when to answer normally and when to use the after-hours message.

TIME ZONE

America/Sao_Paulo

☒ Monday	09:00 🕒 to 18:00 🕒
☒ Tuesday	09:00 🕒 to 18:00 🕒
☒ Wednesday	09:00 🕒 to 18:00 🕒
☒ Thursday	09:00 🕒 to 18:00 🕒
☒ Friday	09:00 🕒 to 18:00 🕒
☐ Saturday	Closed
☐ Sunday	Closed

With no day checked, the assistant answers at any time — exactly as it does today.

Who gets the alert

🔔 **Who gets the alert**

When a visitor asks for a person, Sérgio sends the conversation summary here. With no one set, he doesn't promise contact and keeps helping.

WHATSAPP OF WHO ANSWERS (COUNTRY + AREA CODE + NUMBER)

5511999998888

E-MAIL OF WHO ANSWERS

vendas@suaempresa.com.br

On the **Who gets the alert** card, enter the **WhatsApp** (country code + area code + number) and the **e-mail** of whoever answers. When a visitor asks to talk to a person, Sérgio sends the conversation summary there. **With no one set, he doesn't promise contact** — he keeps helping and asks for the visitor's WhatsApp so you can follow up.

Files he can send

Photos, videos and documents Sérgio can send

Add here what Sérgio can send to the customer during the chat: your price list as a PDF, photos of finished jobs, a video showing your work. Sérgio only sends what is on this list and turned on, and only when the conversation calls for it.

Each file is saved right away, no need for the Save button above.

FILE

 Choose file

Photo (JPG, PNG or WEBP) up to 5 MB · MP4 video up to 16 MB · PDF up to 20 MB

TITLE

E.g.: 2026 price list

WHEN TO SEND

E.g.: when the customer asks for photos of finished jobs

In a few words, when Sérgio should send this file.

Add to the list



No files yet

Add a photo, a video or a PDF above, and Sérgio will be able to send it to the customer when it makes sense.

Add what he can send the visitor (price list PDF, photos of finished jobs, a video): **Choose file** → **Title** → **When to send** → **Add to the list**.

After changing the cards, click Save configuration.

4. Step 2 — Put the bubble on your site

Where: Website chat tab.

 **Configuration**

MODE

Embedded chat (agent) ▼



Assistant: Sérgio
This widget is handled by Sérgio, using your business's knowledge base. Configure persona, knowledge and handoff on Sérgio's page.

PRIMARY COLOR

 #C65D3A

POSITION

Bottom right ▼

WELCOME MESSAGE

Oii! Sou o atendente da Casa Modelo. Quer um orçamento de reforma c

☒ Show automatically on my AutoAgency Landing Pages

☒ Widget active

Save widget

1. In **Mode**, choose **Embedded chat (agent)** — that's Sérgio chatting. (If you also want a button for the visitor to go to your WhatsApp, choose **Both** and fill in the number.)
2. Choose the **Primary color** (your brand color) and the bubble's **Position**.
3. Write the **Welcome message**.
4. Keep **Widget active** checked and click **Save widget**. The **Preview** box shows the bubble the way visitors will see it.

Paste the code into your site

</> Code for your site

Copy the code below and paste it into your site, at the bottom of the page (on WordPress, use a plugin that adds code to the footer). If someone else runs your site, just send them this code.

```
<script src="https://autoagencia.io/widget.js" data-  
token="....." data-mode="inline_chat" data-color="#C65D3A"  
data-greeting="Oi! Sou o atendente da Casa Modelo. Quer um  
orçamento de reforma ou tirar uma dúvida sobre material?" data-  
whatsapp="" data-position="bottom-right" async></script>
```

 Copy code

 Generate new security code

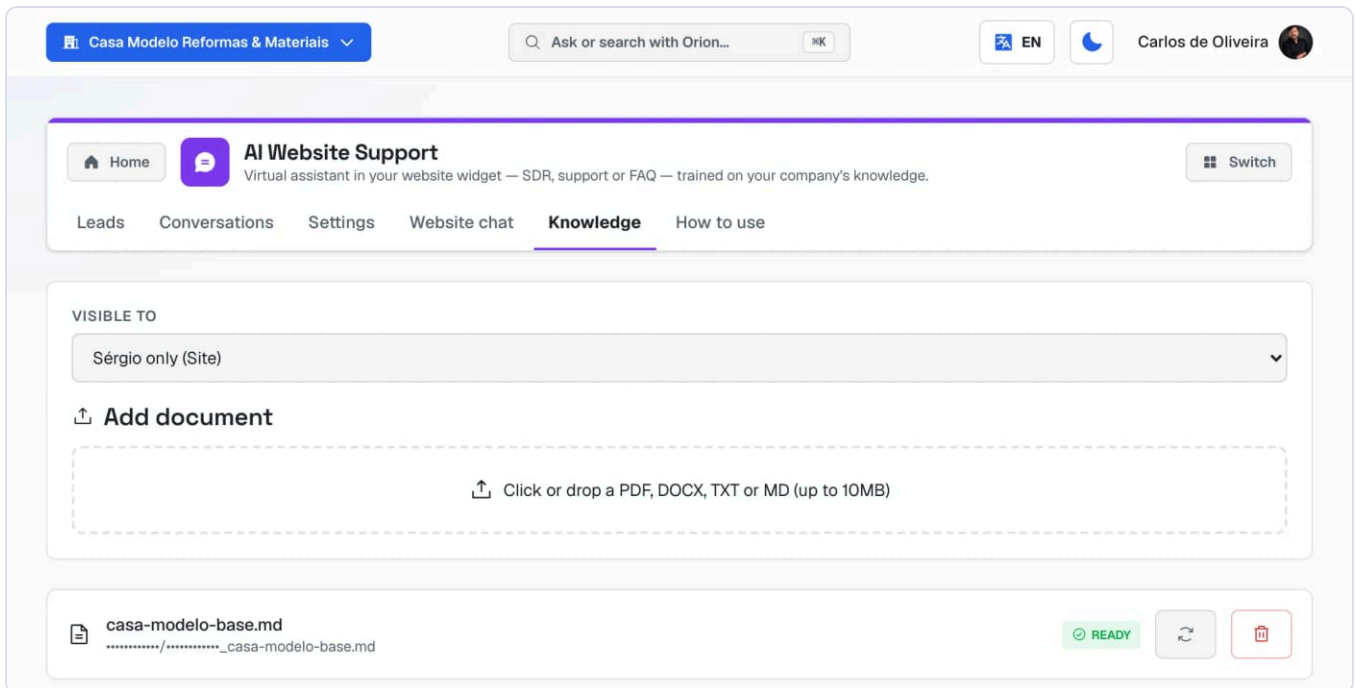
1. Click **Copy code**.
2. Paste it into your site, **at the bottom of the page**. On WordPress, use a plugin that adds code to the footer. If someone else runs your site, just send them the code.
3. Open your site: the bubble shows up in the corner. Send a question to test it.

Have a landing page made by AutoAgency? Check **Show automatically on my AutoAgency Landing Pages** — the bubble appears there without pasting anything.

One assistant per channel. If **Rebeca** already answers the website chat (OmniLeadHub module), the bubble is hers. Pick one of the two so customers don't get duplicate replies.

5. Step 3 — Teach Sérgio about your business

Where: Knowledge tab.



1. In **Visible to**, choose who uses the document: **Sérgio only (Site)**, **Ava only (WhatsApp)** or **Both**.
2. Click or drop a file (**PDF, DOCX, TXT or MD**, up to 10 MB): price list, list of services, frequently asked questions.
3. Wait for the **READY** tag before testing.

Golden tip: write it the way you'd explain it to a new employee. *"Bathroom renovation: from \$1,600. We cover the East side. We don't do electrical work."* A simple sentence beats a pretty document.

6. Step 4 — Set up your team's schedule

With your team added, **Sérgio books the visit by himself**, right in the website bubble: he offers two free slots already saying who goes, the visitor picks one, he confirms right there and the team member gets the alert on WhatsApp. **No Google needed.**

	Nobody added	Team added
What Sérgio offers	A day and a time window, and asks for the address with zip code	Two free slots , already saying who goes
Who confirms	Your team — he says <i>"the team will confirm the time"</i>	He does: <i>"Booked: Thursday, 9 to 11, with Technician A"</i>

Add your team

Where: Sérgio's **Settings** tab → **Team on call** card.

The screenshot shows the 'Team on call' settings card. At the top, it says 'Sérgio spreads visits across the 2 active person(s): offers two day-and-time options, picks who goes by area and that day's load, confirms to the customer and alerts the person on WhatsApp.' Below this, there are two rows for team members. The first row is for 'Técnico A' with the note 'no alert phone · does every service' and an 'Edit' button and a checked 'active' checkbox. The second row is for 'Técnico B' with the same note and controls. Below these rows is a '+ Add person' button. Further down, there is a section for 'VISIT START TIMES (OPTIONAL)' with a text input field containing '09:00, 11:00, 14:00'. Below this input is a note: 'With start times, each visit runs until the next one (e.g. 9 to 11). Empty = free times within business hours, with the length below. Days and hours come from Business hours.' Below this note is a section for 'DEFAULT LENGTH (MINUTES)' with a text input field containing '60' and a 'Save times' button.

1. **+ Add person** → **Name** (a technician, a professional or a department) and, if you like, **Alert phone**, **Gmail** and **Services** (empty = everything) → **Save person**.
2. In **Visit start times**, write your windows (e.g. *09:00, 11:00, 14:00*) or leave it empty for free times with the **Default length**. Click **Save times**. Days and hours come from business hours.

The team is the same as Ava's: whoever you add here shows up there, and visits booked by both land on the same schedule — the same technician is never booked twice at the same time.

To pick who goes, Sérgio looks, in this order, at: the person the visitor asked for, who does the service, who already has a visit in the same area that day (by zip code) and who has the fewest visits. The details are in [Ava's Guide](#).

See, cancel and block

- **See the visits:** Sérgio's **Schedule** tab — the next 7 days, by day, with who goes and the address.
- **Cancel:** **Cancel** on the visit, on the **Schedule** tab. The team member is alerted; let the visitor know using the contact they left.
- **Reschedule:** **Reschedule** on the visit → pick one of the free times. The team member is alerted and, if the visitor left a WhatsApp, they get the new time.
- **Lunch, a day off, a holiday:** **Block time** on the **Schedule** tab — one person or the whole team, the day, and from and to what time. **Free up** undoes it.
- **Vacation:** uncheck **active** next to the name on the **Team on call** card.

Casa Modelo Reformas & Materiais

Ask or search with Orion...

EN

Carlos de Oliveira

Home

AI Website Support

Virtual assistant in your website widget — SDR, support or FAQ — trained on your company's knowledge.

Switch

Leads

Conversations

Settings

Website chat

Knowledge

Schedule

How to use

Team schedule

Visits booked by the assistant in the next 7 days. Team and times are set in the Settings tab.

Block time

Friday, 10/02

09:00–11:00

Técnico A · pintura da sala

Cliente de Exemplo · · Rua Vergueiro 300, Vila Mariana — 04101-000

Reschedule

Cancel

FREE TIMES FROM

01/10/2026

☒ Notify the customer on WhatsApp

Thursday, 10/01, 14:00–18:00 — Técnico A

Friday, 10/02, 11:00–14:00 — Técnico A

Friday, 10/02, 14:00–18:00 — Técnico A

Monday, 10/05, 09:00–11:00 — Técnico A

Monday, 10/05, 11:00–14:00 — Técnico A

Monday, 10/05, 14:00–18:00 — Técnico A

12:00–13:00

Técnico B · Blocked

Almoço

Free up

Casa Modelo Reformas & Materiais

Ask or search with Orion...

EN

Carlos de Oliveira

Home

AI Website Support

Virtual assistant in your website widget — SDR, support or FAQ — trained on your company's knowledge.

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Visits booked by the assistant in the next 7 days. Team and times are set in the Settings tab.

Block time

The assistant won't offer any time inside the block. Use it for lunch, a day off, a holiday or an appointment.

WHO

DAY

FROM

TO

The whole team

01/10/2026

12:00

13:00

REASON (OPTIONAL)

Lunch, day off, holiday...

Block

Optional — Google Calendar

With a team, Google is only used to **copy each visit** into the Google Calendar of whoever has a Gmail added. Without a team, Sérgio books **straight into the Google calendar** of the connected account (Monday to Friday, 9 am to 6 pm, with 15 minutes between appointments).

Make the connection yourself, signed in to the panel with YOUR login, and pick the **business Google account** — the system connects the Google account of **whoever is signed in**.

 **Visit schedule**

No Google calendar connected. Without one, Sérgio offers a day and time, asks for the address and says the team will confirm — never that it is booked.

 [Connect Google Calendar](#)

1. Click **Connect Google Calendar** and then **Connect with Google**. The connection is the same as Ava's — if you already connected there, skip to step 3.
2. **On Google's screen**, pick the business account, check the two **Google Calendar** lines (if you see checkboxes, check them all) and click **Allow**. The step by step with screenshots is in [Ava's Guide](#).
3. On the **Visit schedule** card, leave the box **checked** (with a team: makes the copy; without a team: books straight into Google), check the email next to it and click **Save configuration**.

1

Google account

Connected as

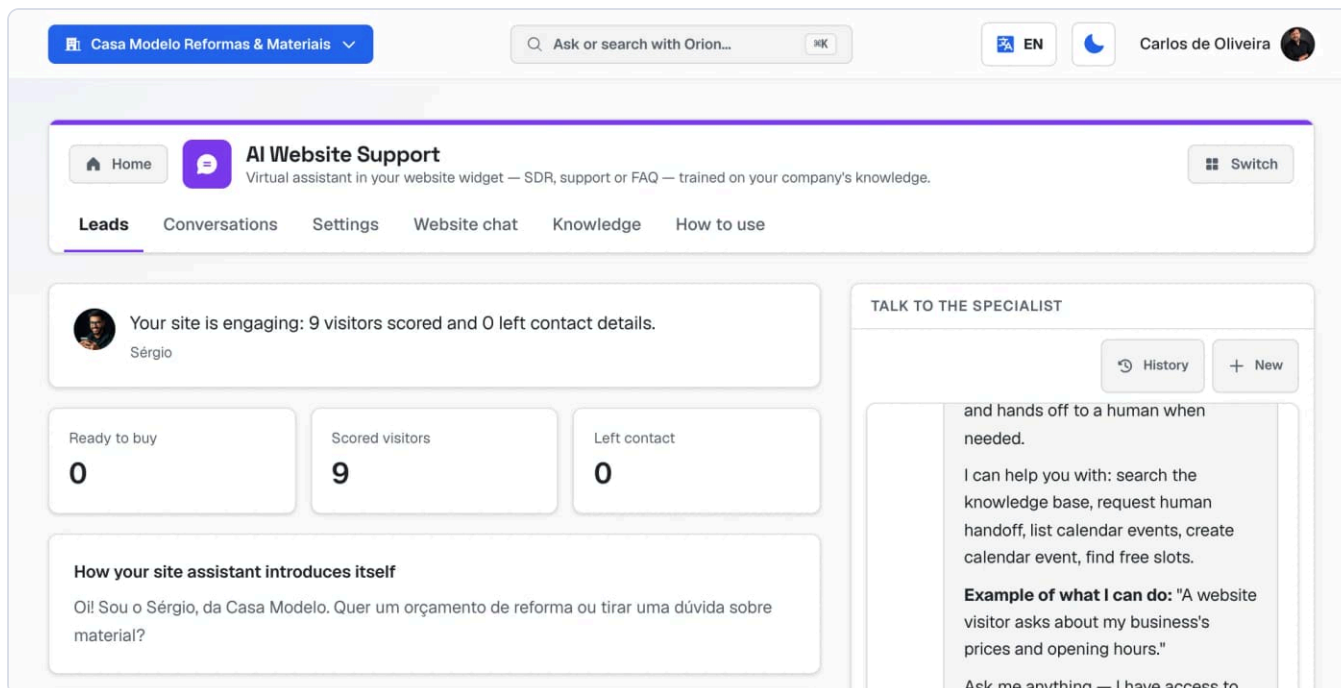
Connected resources: Google Ads · Google Analytics · Search Console · Google Business · YouTube · Google Calendar · Tag Manager

[\[→ Disconnect\]](#)

Seeing the "This Google account belongs to the AutoAgency team" warning? Our team connected it. Follow the **Open Google connections** link, click **Disconnect** and connect again signed in with your own login.

7. See who's close to buying

Where: Leads tab.



- **Ready to buy**, **Scored visitors** and **Left contact** sum up your site.
- Each visitor gets a **score from 0 to 100** for buying intent — the higher, the hotter. Click a visitor to see the pages they visited before chatting.
- On the **Conversations** tab, the **Open**, **Got contact** and **Dropped off** filters show how each conversation ended.

8. Frequently asked questions

Does the bubble slow down my site? The code loads after the page (it has `async`), so the page opens first.

Do I need a developer to install it? No: it's copy and paste, once. On WordPress, a plugin that adds code to the footer does it. If someone runs your site, send them the code.

I changed the color or the greeting. Do I have to paste the code again? No. Save it in **Website chat** and the bubble updates on your site by itself.

What is "Generate new security code" for? It switches off the old code. Use it only if someone put your bubble on a site that isn't yours — and then paste the new code into your site.

What about Ava and Rebeca? **Ava** answers your WhatsApp and **Rebeca** answers Instagram, Messenger, email and WhatsApp in one inbox. Each has her own guide in this manual.

9. When something goes wrong

What happens	What to do
The bubble doesn't show on the site	Check Widget active is checked and saved, and that the code was pasted into the page.
The bubble shows but doesn't answer	Check Sérgio active is checked on the Settings tab.
The visitor gets duplicate replies	Rebeca and Sérgio on the same website chat. Keep only one.
He answers "I don't have that information"	It's missing from Knowledge . Upload the document and wait for READY .
Nobody is alerted when the visitor asks for a person	Fill in Who gets the alert on the Settings tab.
He doesn't offer times with the team	Check that there are people with active checked on the Team on call card and that the days are open in business hours.
The team member didn't get the alert	Check their Alert phone (with area code) and that the business WhatsApp is connected. The visit is on the Schedule tab either way.
Google copies going to the wrong calendar	Check the email on the Visit schedule card. If it isn't the business one, disconnect and connect with your own login.

Still have questions? In the full menu, use **Talk to the Director** — our team answers there. The [Academy and help](#) chapter shows the way.