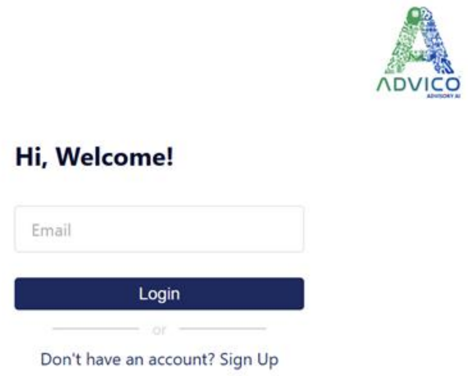
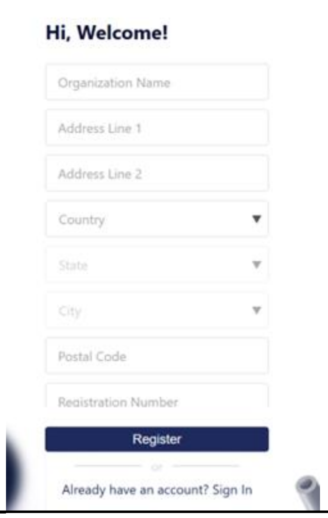
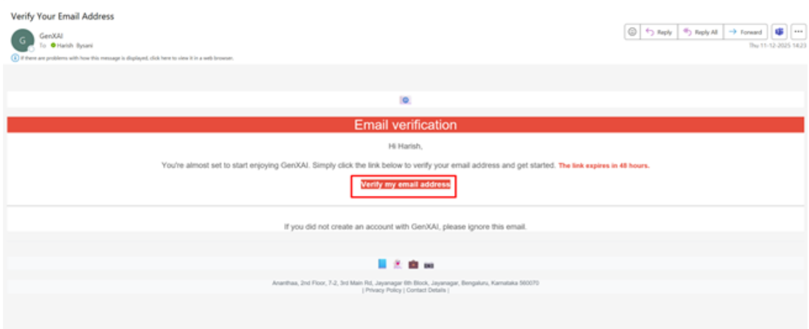
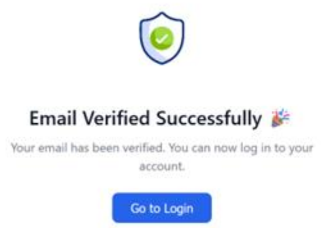
Advico.ai – Getting Started Guide

<table>
<tr><th>Instructions</th><th>Screenshots</th><th>Remarks</th></tr>
<tr><td>Navigate to: Advico and click “Continue”</td><td>
</td><td>Enter registered email, Click on sign up if you are a new user</td></tr>
<tr><td>Sign up form details</td><td>
</td><td>Provide required details, make sure to scroll down the form to fill in all the details before you register.</td></tr>
<tr><td>Once registration is complete, User will get an email to confirm the same and activate</td><td>
</td><td>Click on “Verify my email address”</td></tr>
<tr><td>After email is verified, Click on “Go to Login”</td><td>
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2. Login

Once verified, the Organisation Admin can log in using the registered email ID and set password during activation.

3. Home Page (User Dashboard)

Upon login, users land on the **Chat Interface Dashboard**, which displays:

- **AI Agents assigned to the user**, shown in a grid/list view.
- One agent can be selected at a time for conversation.

This serves as the central workspace for accessing business insights.

4. Organisation Admin Capabilities

The first registered user becomes the **default Organisation Admin**.
Admins can manage all platform configurations, including:

- Data Sources
- AI Accounts
- AI Agents
- Agent Templates
- User Roles & Departments
- User Management (licences, access, onboarding)

5. Connecting Business Data Sources

Before creating an AI agent, the admin must link business databases.

5.1 Supported Connections

- SQL Server (each connection links to a single database)

5.2 Configuration Steps

1. Navigate to **Data Sources**.
2. Add a new connection.
3. Provide server address, database name, and credentials.
4. Test and save the connection.

Once configured, these data sources become available to AI agents.

6. Configuring AI Capabilities

6.1 AI Accounts (LLM Providers)

Admins must configure AI provider's credentials before creating agents.

Supported LLM Providers:

- **OpenAI (Currently supported)**
- ***Google Gemini**
- ***Grok**
- ***Meta LLaMA**

*These LLMs would be supported in future releases.

Steps:

1. Navigate to **AI Accounts**.
2. Select an LLM provider.
3. Add one or more API keys.
4. Save the configuration.

6.2 Creating AI Agents

After AI Accounts are configured, admins can create AI Agents.

Agent Creation Workflow

1. Select the **AI Account** and **API Key**.
2. Provide:
    a. **Agent Name**
    b. **Agent Description**
3. A **unique Agent ID** is auto generated.
4. Choose the agent type:
    a. **Custom Agent**
    b. **LLM Assistant** (e.g., OpenAI Assistant)

**Custom Agent Setup*

Provide:

- Agent Instructions & Behaviour
  (business logic, formulas, metrics mapping, boundaries, compliance rules)
- Linked Data Sources
- Tables/Views the agent can access

Assistant-Type Agent Setup

Provide:

- Assistant Name
- Assistant ID (from provider)

After creation, agents can be assigned to user roles.

*Would be supported in future releases

8. Defining Departments & User Roles

Before onboarding users, admins must set up the organizational structure.

8.1 Departments

Create departments such as Sales, Finance, HR, etc.

8.2 Roles

Create Roles based on functions or Org Hierarchy

Each role must be assigned one or more AI Agents.

Examples:

- **Sales Executive Role → Sales Agent**
- **Finance Analyst Role → Finance Agent, Compliance Agent**

Roles determine which insights and capabilities users can access.

9. User Management

Admins can add users based on purchased|available number of licenses.

Steps:

1. Navigate to **Users**.
2. Add user details (name, email, department, role).
3. Assign role(s) that include AI agent permissions.

Each new user receives:

- An **activation email**
- A link to set their password

Their **email ID becomes their username**.

10. End User Experience

Once activated, end users can:

1. Log in.
2. View agents assigned to their role.
3. Select an agent and start a conversation.
4. Receive AI-generated insights based on:
    a. Business data
    b. Configured rules and metrics
    c. LLM capabilities

Users can ask questions or request analytics, reports, summaries, forecasts, and operational insights according to the agent’s purpose.