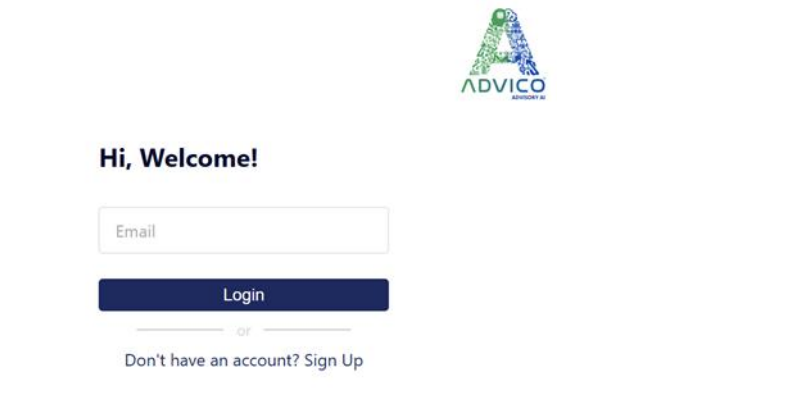
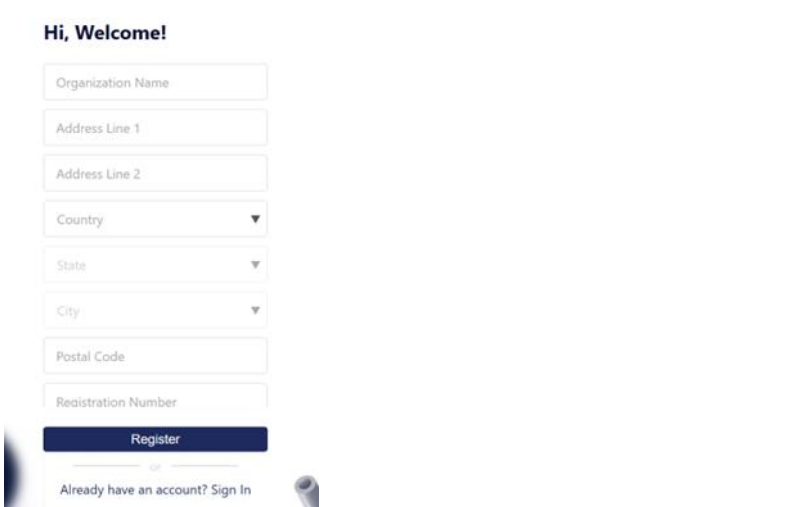
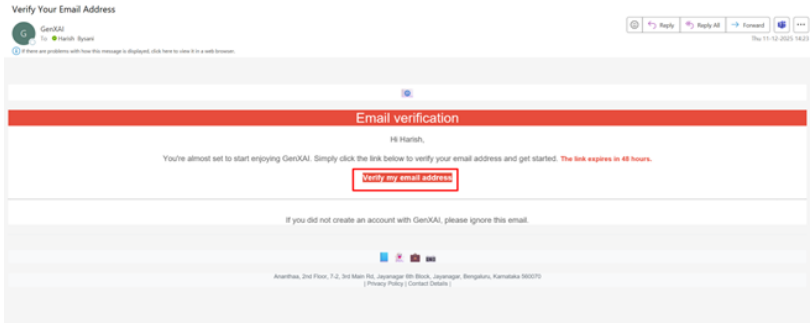
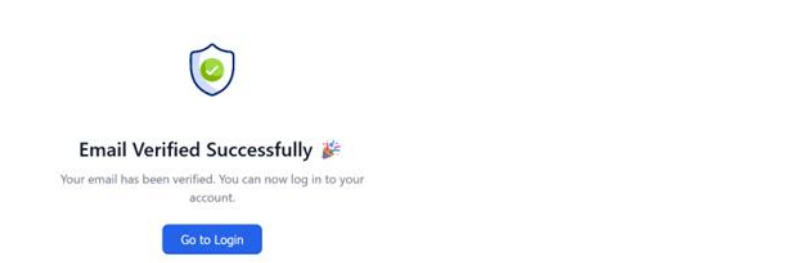


Advico.ai – Getting Started Guide

Instructions	Screenshots	Remarks
Navigate to: Advico and click “Continue”	 The screenshot shows the Advico.ai logo at the top. Below it, the text "Hi, Welcome!" is displayed. There is an input field for "Email" and a "Login" button. Below the login button, there is a link that says "Don't have an account? Sign Up".	Enter registered email, Click on sign up if you are a new user
Sign up form details	 The screenshot shows the "Hi, Welcome!" heading followed by a registration form. The form includes fields for "Organization Name", "Address Line 1", "Address Line 2", "Country" (with a dropdown arrow), "State" (with a dropdown arrow), "City" (with a dropdown arrow), "Postal Code", and "Registration Number". At the bottom of the form is a "Register" button. Below the button, there is a link that says "Already have an account? Sign In".	Provide required details, make sure to scroll down the form to fill in all the details before you register.
Once registration is complete, User will get an email to confirm the same and activate	 The screenshot shows an email interface. At the top, it says "Verify Your Email Address" and "GenXAI to Harish Ryant". Below this, there is a red banner that says "Email verification". The main body of the email says "Hi Harish, You're almost set to start enjoying GenXAI. Simply click the link below to verify your email address and get started. The link expires in 48 hours." and includes a red button that says "Verify my email address". At the bottom, it says "If you did not create an account with GenXAI, please ignore this email." and provides contact information for Advico.ai.	Click on “Verify my email address”
After email is verified, Click on “Go to Login”	 The screenshot shows a green checkmark icon inside a shield. Below it, the text "Email Verified Successfully" is displayed. Underneath, it says "Your email has been verified. You can now log in to your account." and there is a "Go to Login" button.	

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.