

How To Create An AI Agent

Within the **AI Agents Lobby**, you can set up, configure and train your AI Agent to resolve visitor inquiries by leveraging a knowledge base you define.

How to Set Up Your AI Agent

Follow these instructions to configure the primary settings and capabilities of your new AI Agent.

Step 1: Create an AI Agent

Follow the steps below to create an AI Agent:

1. Select **AI Agents** from the left navigation menu.
2. Click **Create AI Agent** in the top right of the AI Agents lobby.
3. Define the name and goal of the AI Agent.
4. Click **Create**.

Step 2: Configure the General Settings of the AI Agent

Click the **General settings** section to define the first message that the AI Agent will use when interacting with the visitor.

Step 3: Define the Conversation Guidelines of the AI Agent

Conversation guidelines are automatically created for your agent based on its specific goal. You can customize these by clicking the **Conversation guidelines** section to provide specific instructions on how the AI Agent should engage with your visitors.

For more detailed information, please see our [Defining Your AI Agent's Conversation Guidelines](#) article.

Step 4: Provide the Knowledge & Training to the AI Agent

Click the **Knowledge & training** section, to add data sources that the AI agent will reference when generating answers.

For a detailed guide on configuring the Knowledge & Training section of your AI Agent, please see our [How To Manage Knowledge Sources For AI Agents](#) article.

How to Test and Publish the AI Agent

Before publishing your AI Agent, it is essential to test its responses in a safe environment to ensure they meet your quality standards.

Testing the AI Agent

To verify how the AI Agent will respond to visitors based on the configuration changes:

1. Use the **Preview** pane on the right to ask your AI Agent questions.
2. After making any configuration adjustments, click **Restart** in the top right of your Preview pane. This ensures the latest updates are reflected in the test environment.
3. Review the responses to verify how the AI Agent is responding based on the updated configuration.

Publishing the AI Agent

Once you are satisfied with the AI Agent's performance in the preview, click **Publish changes** in the top right to push the changes to the live AI Agent.

Next Up: [How To Use AI Agents Within Your Chatbots](#)
