Magento AI Chat Product Guide

Product scope

- Guest storefront AI chat for product discovery, shipping, returns, and policy questions
- Verified customer mode with email OTP by default and optional phone OTP
- Safe Magento-aware personalization without any installable Magento module
- Merchant and superadmin control planes with audit-friendly settings and runtime gates

Onboarding flow

1. Create a merchant account and workspace.
2. Connect Magento with API credentials.
3. Pick a plan and confirm entitlements.
4. Publish the storefront snippet.
5. Review onboarding status, widget health, and verification defaults.

Merchant navigation

- Overview: launch status, next-step recommendations, and current blockers
- Setup: onboarding, integrations, widget installation, and workspace settings
- AI Chat: bot settings, language behavior, knowledge sources, and workflows
- Personalization: verified-session scopes, returns policies, and customer-safe automation
- Customers: verified customer sessions, safe projections, and recent verified activity
- Insights: chat, recommendation, and operational analytics
- Documentation: setup guides, security notes, and generated PDF product guides
- Billing: plan, entitlements, usage pressure, and billing state
- Settings: team access and runtime defaults

Superadmin navigation

- Dashboard: tenant health, verification risk, latest product documents, and alerts
- Accounts and Stores: tenant directory, flags, notes, runtime state, and integrations
- Plans and Usage: plan definitions, billing oversight, and usage pressure
- Security: suspicious verification attempts, API blocking, and audit visibility
- Content and Documentation: feature flags, product guides, and knowledge-related visibility
- System: operations center, maintenance windows, and platform controls

Verification model

- Email OTP is enabled out of the box.
- Phone OTP can be enabled per store and plan.
- Verification creates a time-limited Verified Customer Session instead of a Magento login session.
- Safe scopes control access to orders, profile summaries, and personalized recommendations.
- OTP challenges are short-lived, rate-limited, and logged.

Identified customer capabilities

- Greet the customer using safe profile context where available
- Explain recent order status and shipment state
- Adapt returns guidance to recent order context and policy wording
- Use recent purchase summaries for safe recommendation context
- Create agent handoff packages with verification state, order context, and tran

script snippets

Safe boundaries

- No password reset or account management actions through the widget
- No raw Magento payloads sent to LLM providers
- No autonomous risky order actions
- No customer enumeration during verification responses

Where to review results

- Merchant dashboard for launch status and recommended next steps
- Customers page for verified sessions and recent customer-safe context
- Handoffs page for escalations and agent notes
- Analytics page for usage and operational visibility
- Superadmin operations, security, and dashboard surfaces for platform oversight

Troubleshooting basics

- If the widget loads but verification is unavailable, check plan entitlements and runtime policy
- If order-aware answers are blocked, verify scopes and customer session status
- If Magento-backed lookups fail, re-check runtime credentials and connector health
- If documents or PDFs are missing, review the generated documents registry and upload paths