



BANKWP PRODUCT DOCUMENTATION

Pilot AI Support Pro Complete Customer Manual

Installation, OpenAI setup, knowledge synchronization, WooCommerce, appearance, operations, privacy, security and troubleshooting.

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This manual documents the standard customer workflow for Pilot AI Support Pro 1.4.7. Menu labels can vary slightly in later releases. OpenAI API usage is separate from the plugin license and may create charges in the customer's OpenAI account.

1. Product overview

Pilot AI Support Pro is a grounded AI sales and customer-support assistant for WordPress and WooCommerce. It combines selected website knowledge, an administrator-controlled OpenAI Vector Store and optional live WooCommerce data to answer visitor questions through a responsive chat widget.

Core capabilities

- Grounded responses using content synchronized from selected published WordPress sources.
- OpenAI Responses API integration with an explicitly selected Vector Store.
- WooCommerce product search, current pricing, recommendations, product cards and safe purchase links.
- Conversation history, lead capture, feedback, analytics, rate limiting and retention controls.
- Durable synchronization with batching, retries, recovery, queue status and administrator diagnostics.
- Responsive, keyboard-accessible frontend widget with configurable branding and visibility.

What the plugin does not do

The assistant does not receive filesystem, SQL, PHP, shell, JavaScript or WordPress-administration access. It must not be treated as a payment processor, password collector, legal authority or guaranteed source of truth. Private and draft content are excluded from normal discovery.

Recommended implementation order

Step	Action	Expected result
1	Install and activate the plugin.	Local tables are created; no OpenAI request is made.
2	Configure and test OpenAI.	The server can authenticate with the Responses API.
3	Create or connect the Knowledge Base.	A Vector Store is selected.
4	Choose sources and synchronize.	Published content becomes searchable.
5	Configure business rules and WooCommerce.	The assistant follows store-specific boundaries.
6	Customize, test and launch the widget.	Visitors can use the production assistant.

2. Requirements and preparation

- WordPress 6.4 or newer.
- PHP 8.1 or newer.
- HTTPS on the public website.
- Outbound HTTPS access to `api.openai.com`.
- A working WP-Cron path or a real server cron that requests `wp-cron.php` regularly.
- An OpenAI Platform account with API billing configured.
- WooCommerce only if commerce features will be enabled.

Before installing

Create a full website backup, confirm administrator access, verify the server PHP version and review any security plugin or firewall rules that could block OpenAI or WordPress REST requests. Use a staging site first when modifying a busy production store.

OpenAI account note

A ChatGPT subscription does not include OpenAI API usage. The API key must come from the OpenAI Platform account. Configure usage limits and billing alerts in that account before production launch.

Content readiness

The quality of grounded answers depends on the quality of published content. Review product descriptions, support pages, licensing terms, refund policy, privacy policy and contact information. Remove contradictions before synchronization.

3. Installation and activation

Step	Action	Expected result
1	In WordPress, open Plugins > Add Plugin > Upload Plugin.	The upload form is displayed.
2	Select pilot-ai-support-pro-1.4.7.zip and choose Install Now.	WordPress extracts the plugin.
3	Choose Activate Plugin.	Pilot AI Support appears in the admin menu.
4	Open Pilot AI Support > System Status.	Environment and plugin version can be reviewed.
5	Optionally open the setup wizard.	The six-step guided setup begins.

What activation changes

Activation creates the plugin's local database tables and schedules maintenance. It does not contact OpenAI, create a Vector Store or start knowledge synchronization by itself.

Updating an existing installation

Upload the newer ZIP and choose Replace current with uploaded when WordPress detects the same plugin directory. Back up first. After updating, verify the version in System Status and clear page/cache optimization layers if the old widget assets remain visible.

Safe rollback

Keep the previous release ZIP and a database backup. If a rollback is required, deactivate the plugin, install the approved earlier build and verify schema compatibility. Do not delete the Knowledge Base in OpenAI unless that remote deletion is intentional.

4. OpenAI configuration

Add the API key

Step	Action	Expected result
1	Open Pilot AI Support > AI Settings.	The connection settings are visible.
2	Paste the OpenAI Platform API key, or define <code>PILOT_AI_OPENAI_API_KEY</code> in <code>wp-config.php</code> .	The key is available only server-side.
3	Select the primary and fallback models supported by your account.	Model routing is configured.
4	Save changes and run the connection test.	A successful server response is shown.

When `PILOT_AI_OPENAI_API_KEY` is defined in `wp-config.php`, the saved key field is disabled. Never place an API key in JavaScript, page content, screenshots, public support messages or source control.

Response controls

- Use conservative output limits for customer support.
- Keep structured output enabled where supplied by the plugin.
- Configure a fallback model so temporary primary-model issues do not immediately disable support.
- Review OpenAI usage after launch and adjust daily or identity limits in the plugin.

Connection failures

Verify the key, Platform billing, model availability, outbound HTTPS, DNS and firewall rules. System Status and Diagnostics should show request identifiers without exposing credentials.

5. Business instructions

Business Instructions define how the assistant represents the store. They should be specific, factual and restrictive where mistakes could affect pricing, licensing, refunds, security or customer accounts.

Recommended instruction template

You are the official AI assistant for [Business Name]. Answer in the visitor's language. Use only verified website knowledge and approved live WooCommerce data. Never invent prices, discounts, stock, policies, guarantees, compatibility or product capabilities. Ask a short clarifying question when needed. For billing, refunds, licensing disputes, account access, payment information or uncertain answers, direct the visitor to [Support URL or email]. Do not request passwords, payment card data or API keys. Keep answers concise, helpful and link to the relevant official page.

Testing instructions

- Ask for a product recommendation with clear requirements.
- Ask about a policy that exists in the Knowledge Base.
- Ask for a feature the product does not provide.
- Ask an ambiguous question and confirm the assistant requests clarification.
- Ask for private order details while logged out and confirm access is refused or redirected.
- Ask in another supported language and review tone and accuracy.

6. Knowledge Base setup

Create or connect

Open Pilot AI Support > Knowledge Base. Create a Knowledge Base once, or reconnect an existing OpenAI Vector Store ID. The selected Vector Store remains under administrator control. Disconnecting a store is different from deleting it remotely.

Choose sources

- Published pages and posts.
- WooCommerce products and variations.
- Product categories and tags.
- Documentation or approved custom post types.
- Manual business knowledge when available in the plugin interface.

Drafts and private content are excluded. During extraction, scripts, styles, navigation markup, shortcodes and non-semantic HTML are removed. Content hashes avoid uploading unchanged sources again.

First synchronization

Step	Action	Expected result
1	Select eligible source types.	The discovery scope is defined.
2	Choose Sync Website Knowledge.	A knowledge manifest is created.
3	Leave automatic processing enabled or use the approved server cron.	Pending records move through Processing to Synced.
4	Wait for Pending 0, Processing 0 and Failed 0.	The synchronization is complete.
5	Choose Test Knowledge Base and ask a factual question.	Grounded sources and a response are returned.

7. Synchronization and queue operations

Status counters

Counter	Meaning
Pending	Discovered items waiting for work.
Processing	Items currently claimed by a worker.
Synced	Items confirmed in the Vector Store.
Failed	Items requiring review or retry.

Administrator controls

- Run Next Batch Now: process an approved batch manually.
- Pause Sync: stop claiming new items without deleting completed work.
- Resume Sync: restart a paused or starved queue.
- Recover Stuck Items: return timed-out processing records to Pending.
- Force Recover Processing Items: immediately return processing records after explicit confirmation.
- Retry Failed: return eligible failed records for another attempt.
- Cancel Sync: stop the run while preserving files already indexed.
- Queue Health Check: inspect scheduler and worker health.

Production cron

For reliable background work, configure the hosting control panel to request wp-cron.php on a regular schedule. Version 1.4.7 also includes a private signed internal runner plus Action Scheduler and WP-Cron fallback paths. Avoid repeatedly starting a new full synchronization when a queue is already active.

8. WooCommerce capabilities

WooCommerce is optional. Enable only the capabilities the store needs. Product cards and current prices are built from WooCommerce product objects rather than trusting model-generated values.

- Product search and comparisons.
- Current product prices.
- Relevant product recommendations.
- Product cards with official links.
- Add-to-cart links for eligible simple products.
- Choose Options links for variable products.
- Authenticated order lookup when explicitly enabled.

Order privacy

Authenticated order lookup is off by default. When enabled, customer identity comes from the active WordPress session. A customer ID supplied by frontend input must never be trusted. Test order access with logged-out, customer and administrator accounts.

Commerce acceptance tests

- Confirm a published product can be found by name and use case.
- Verify displayed prices match WooCommerce.
- Verify variable products use Choose Options.
- Confirm unpublished products are not recommended.
- Confirm logged-out visitors cannot retrieve private order data.
- Test cart and checkout links on desktop and mobile.

9. Appearance and widget launch

Appearance settings

- Assistant name and subtitle.
- Welcome message and suggested questions.
- Primary brand color and screen position.
- Widget enabled status.
- Desktop, mobile and guest visibility.
- Public privacy notice and privacy-policy URL.

Frontend behavior

The widget is keyboard accessible, closes with Escape and becomes full-screen on narrow devices. Assistant messages are treated as escaped content instead of executable HTML. Cart, checkout and My Account pages may be excluded from display by design.

Launch test

Step	Action	Expected result
1	Open the website in a private browser window.	Guest visibility is tested.
2	Check desktop and mobile layouts.	The launcher and panel are usable.
3	Ask five known questions.	Answers match approved knowledge.
4	Test uncertainty and escalation.	The assistant does not invent an answer.
5	Review source and product links.	Links stay on approved official destinations.
6	Review the conversation in admin.	The transcript and usage record are available.

10. Conversations, leads and analytics

Conversations

Anonymous conversations use a cryptographically random public identifier. Logged-in sessions bind to the active WordPress account. Administrators can review messages, outcomes and feedback according to their access level and retention policy.

Lead capture

Lead collection requires a name and a valid email address and is stored separately from the transcript. Explain the purpose of collection and link the site's privacy policy. Do not request sensitive authentication or payment information.

Analytics workflow

- Review top questions and unanswered intents.
- Inspect negative feedback and escalation patterns.
- Compare product recommendation clicks with sales intent.
- Monitor usage and cost trends.
- Improve weak website content, then resynchronize changed sources.
- Test revised business instructions before publishing them.

11. Privacy, security and retention

Data flow

Chat messages and limited page context may be sent to OpenAI to answer requests. The OpenAI API key remains server-side. Raw IP addresses are not stored by the plugin for anonymous rate limiting; a salted hash is used transiently.

Required customer decisions

- Publish a clear AI and privacy notice.
- Choose transcript and usage retention periods.
- Decide whether anonymous chat is allowed.
- Set per-identity rate limits and a site-wide daily ceiling.
- Restrict administrator access to trusted users.
- Document the legal basis and customer rights applicable to the business location.

Security model

Public chat input is size-limited, rate-limited and sanitized. Administrator REST operations require `manage_options` plus a REST nonce. Citations are retained only when their host matches the WordPress site. Product components are reconstructed from WooCommerce. Logs must never contain credentials, cookies, passwords or payment data.

12. Maintenance and updates

- Back up WordPress files and database before updates.
- Update on staging first when possible.
- Verify the plugin version in System Status after replacement.
- Review diagnostics and queue counters after updating.
- Test OpenAI, Knowledge Base and the frontend widget.
- Resynchronize only when content or schema changes require it.
- Monitor API usage and OpenAI billing alerts.
- Keep WordPress, PHP, WooCommerce and security components supported.

Content changes

When selected published content changes, the plugin uses content hashes to identify work. Changed remote files are replaced, unchanged sources are skipped and excluded public sources can be removed remotely. Confirm the queue finishes after large catalog changes.

Uninstall behavior

Plugin data remains by default unless the administrator explicitly enables deletion. Review the uninstall option before removing the plugin. Remote OpenAI resources are not something to delete casually; confirm backups, compliance requirements and business intent first.

13. Troubleshooting

Symptom	Resolution
Widget is missing	Confirm widget enabled, desktop/mobile/guest visibility, and verify the page is not an excluded cart, checkout or My Account view. Clear cache and optimization layers.
Invalid API key	Verify the OpenAI Platform key, billing, model access and outbound HTTPS. A ChatGPT subscription is not API billing.
Knowledge unavailable	Confirm a Vector Store is connected, synchronization completed and Failed is zero. Run Test Knowledge Base.
Queue stops progressing	Run Queue Health Check, verify server cron/WP-Cron, inspect System Status, then use Resume Sync. Do not start a second full synchronization.
Processing item is stuck	Use Recover Stuck Items after the timeout. If an administrator confirms the item is orphaned, use Force Recover Processing Items.
Malformed or invalid response	Open Diagnostics and record Request ID, Record ID, source, stage, error code and message. Check PHP error details without sharing keys.
WooCommerce cards absent	Confirm WooCommerce, product cards and relevant permissions are enabled and the returned IDs belong to published products.
Old design after update	Confirm the version, clear WordPress/page/CDN/browser caches and verify the plugin asset URLs use the new version.

Information to include in a support request

- Plugin, WordPress, PHP and WooCommerce versions.
- Exact time and administrator action.
- Request ID and failed stage.
- Queue counters and current status.
- Sanitized error message and relevant PHP file/line.
- Whether the issue reproduces with cache disabled.
- Never include API keys, passwords, cookies or payment information.

14. Launch checklist and support information

- ☐ Backup completed
- ☐ PHP and WordPress requirements confirmed
- ☐ OpenAI connection test passed
- ☐ Knowledge Base connected
- ☐ Pending 0 / Processing 0 / Failed 0
- ☐ Knowledge test passed
- ☐ Business instructions reviewed
- ☐ WooCommerce permissions tested
- ☐ Privacy notice and URL configured
- ☐ Desktop and mobile widget tested
- ☐ Escalation path tested
- ☐ Rate limits and retention configured
- ☐ OpenAI usage alerts configured

Official product resources

[Pilot AI Support Pro product and license page](#)

[BankWP website and customer support entry point](#)

Keep this manual with the site's operating documentation. Review it after major plugin updates and revise internal procedures when permissions, privacy practices or escalation contacts change.