Guardrails and branding your alby widgets

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You can customize the voice and tone of alby's responses, making it match your brand style for the best experience for your customers.

This process is best done before you launch alby on your site.

- Rules
  - Rules provide alby with broad guidelines on how to answer questions and clarify phrasing on what terms to use with customers, based on the product or category being viewed.
- Global guidelines
  - Global guidelines provide overarching customization options to how alby responds to customers for any category or product.

Rules

Rules can help give alby directions to follow when specific topics are asked by customers. When writing the rules, you can instruct alby to use certain words or direct customers to specific URLs. You can type directly to alby, as if you're instructing a colleague on how to respond.

alby recommends no more than 20 rules.

Examples

Customer prompt	Rule
Does this have a warranty?	Answer and then link to the warranty document: https://www.website.com/warranty.
Is this made in the USA?	If the product description says "Made in the USA," answer yes. Otherwise say no.

Add a rule

To add a rule, follow the below steps:

1. Navigate to **Knowledge** > **Rules** in the menu. A list of current rules displays.
2. Click **+ New Rule.** A rule dialog box appears.
3. Enter the prompt text question that a customer may ask.
   a. If desired, add alternate phrasing in a new text box.
4. In the **About** section, choose whether the rule applies to all the products in your catalog, or specific ones.
5. Enter a rule for how you would like alby to respond.
6. Click **Create Rule**.

Global guidelines

Global guidelines are the highest level of control inside alby. These instructions will always be considered by alby, regardless of customer input. Use global guidelines to align alby's responses to your brand style and company policies.

Alby recommends no more than 10 global guidelines.

Examples

Guideline
Voice and tone should be casual and conversational
Never apologize on behalf of the company
Never mention specific price of product in responses, encourage shopper to check the product detail page for the most accurate price.

How to add global guidelines

To add a global guideline, follow the below steps:

1. Click your name to open a popup modal, then click **Settings**. The Account Settings page displays.
2. Click **Global Guidelines**. Any previously entered guidelines display.
3. Click **New Global Guideline**.
4. Add your guideline.
5. Click **Save**.

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