KI.ordo®

User Handbook

Every feature and workflow in KI.ordo explained step by step, with screenshots and examples.

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As of: 22 October 2026

The screenshots show sample data.

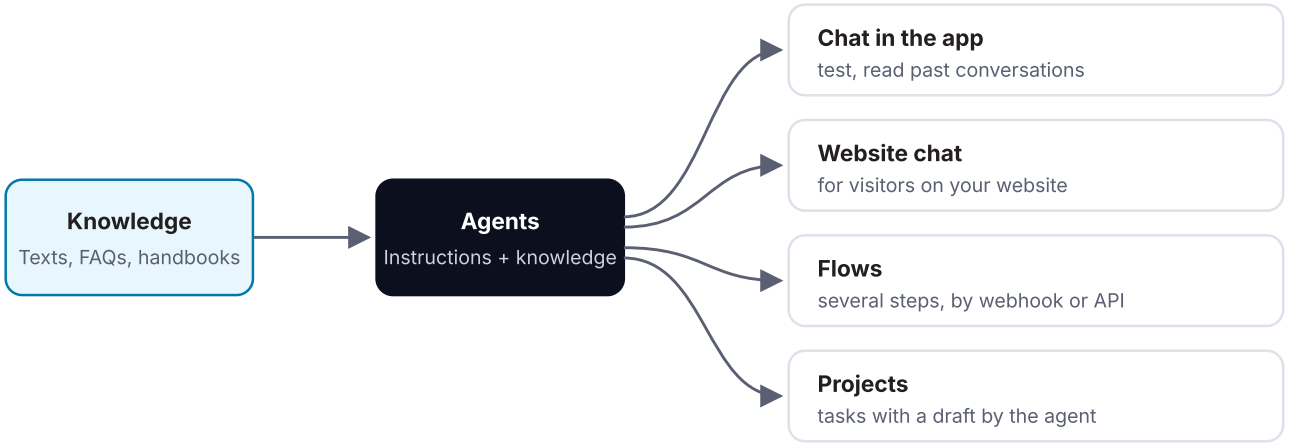
PART A

Getting started.

How KI.ordo is structured, how to sign in and how to find your way around the interface.

1 How KI.ordo is structured.

KI.ordo is a work platform for AI agents. It consists of a few building blocks that build on one another. **Knowledge** is the foundation: your company's texts, handbooks and frequently asked questions. **Agents** answer on the basis of this knowledge. You can use agents in four places: in the app chat, as a chat on your website, in flows and in projects.



Alongside: tools for org chart, responsibility matrix, process check and handbook assistant.

AREA	WHAT FOR	CHAPTER
Knowledge	Texts that agents rely on. KI.ordo splits them into sections and finds the right ones for each question.	5
Agents	AI assistants with fixed instructions, a model and assigned knowledge.	6
Flows	Combine several steps into a repeatable process, e.g. "read email, classify it, draft a reply". Started by click, API, webhook or schedule.	7 to 9
Templates	Import ready-made agents and flows with one click and adapt them.	9
Projects	Organise tasks on a board and let agents write drafts.	10
Website chat	Offer an agent as a chat window on a website.	11
API & webhooks	Call agents and flows from other programs, including Claude and Claude Code (MCP).	12
Shopify	Look up orders and products of your Shopify shop in flows.	13
Tools	Org chart, responsibility matrix, process check, handbook assistant.	14 to 17
Academy	Short lessons with exercises and quizzes: understand AI and learn KI.ordo step by step.	18
Administration	Team, roles, settings with your own brand, backup and change log, subscription and AI credit.	19 to 21

Workspaces

All content belongs to a **workspace**, for example your company or a client. Each workspace has its own knowledge, agents, flows, projects and team. A person can be a member of several workspaces and switch between them at the top left. Content in one workspace is not visible in others.

Who answers?

The answers are written by Claude, an AI model from Anthropic. KI.ordo sends Claude the agent's instructions, the conversation so far and the matching knowledge sections. At the top right of the app, ‹**Claude connected**› shows that access is set up. If it says ‹**AI not connected**›, the AI is temporarily unavailable; KI.ordo keeps working but returns clearly marked sample answers. The provider sets up access; you do not need to do anything. In the demo access from the website, it says ‹**Demo access**› there (chapter 2).

> **Principle:** AI answers are drafts. Check content before you pass it on or base decisions on it. People make the decisions.

2 Booking a plan and signing in.

You reach the app via ‹**Sign in**› at the top right of **www.kiordo.de**. If KI.ordo runs on your own server under the Enterprise plan, use that server's address with `/app/` at the end.

Booking a plan and creating an account

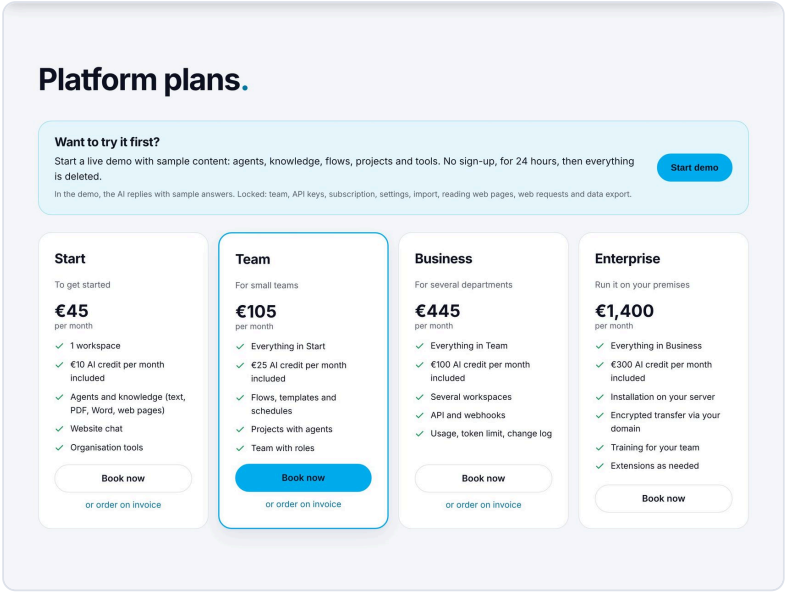


Fig. 1 · Pricing page with the four plans and "Book now"

1. On the website, open ‹**Pricing**› and click ‹**Book now**› for the plan you want.
2. You are taken to Stripe's payment page. Enter your payment method and billing address; you can also add a VAT number and a promotion code. **Back** on the payment page returns you to the pricing page without buying.
3. After payment, KI.ordo opens with "Payment received: ... plan. Now create your account." (Fig. 2).

4. Enter **Your name** and **Workspace** (e.g. your company name). The **Email** is the address from your order and cannot be changed here.
5. Choose a **Password** with at least 10 characters and click ‹**Create account**›. You are now signed in and the **Owner** of the new workspace with the plan you booked.

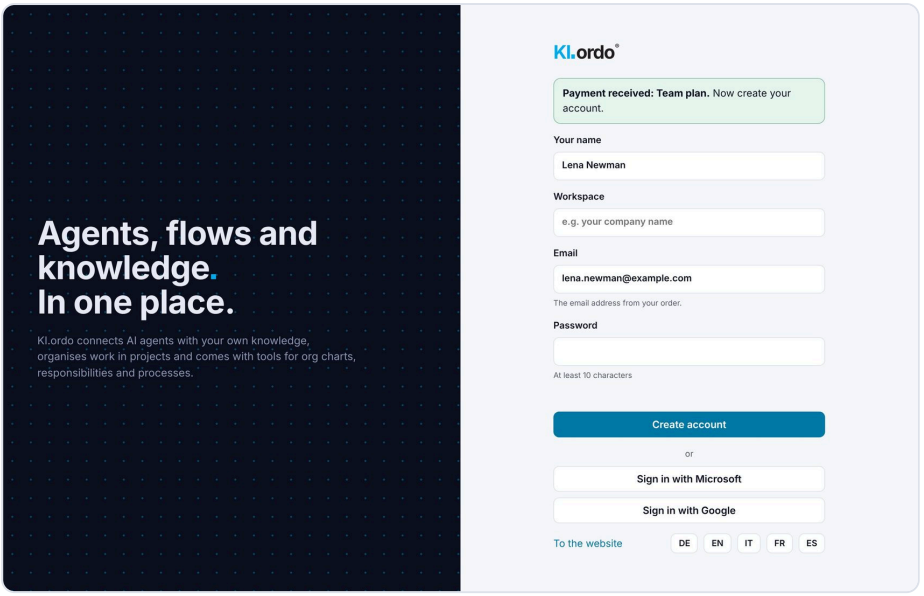


Fig. 2 · Creating the account after payment; the email address comes from the order

A workspace created this way starts with sample content in the chosen language: the knowledge source “Example: Services and process”, the agent “Reception”, the flow “Sort an enquiry” and the project “Example: Reorganising purchasing”. You can change or delete them.

Ordering on invoice

Businesses can also order on invoice instead of through Stripe and pay by bank transfer. If a plan shows the link ‹**or order on invoice**›, this option is available for that plan.

1. On the pricing page, click ‹**or order on invoice**› under the plan. The “Order on invoice” page opens (Fig. 3).
2. Enter the **Plan**, **Company**, **Your name**, address and **Country**. The **VAT ID** is required for businesses in the EU outside Germany. The form shows the net amount, VAT and total per month.
3. Enter the **Email for invoices and sign-in** and choose a **Password for your account** (at least 10 characters). If you are already signed in, no password is needed; the plan is then added to your account as a new workspace.
4. Confirm that you are ordering as a business, accept the terms and conditions and click ‹**Place binding order**›.
5. You receive an email with a confirmation link that is valid for 48 hours. Only after you click the link and then ‹**Confirm order now**› does KI.ordo create your account and workspace.
6. The first invoice arrives as a PDF by email. You are then signed in and taken to the app; the workspace starts with the sample content.

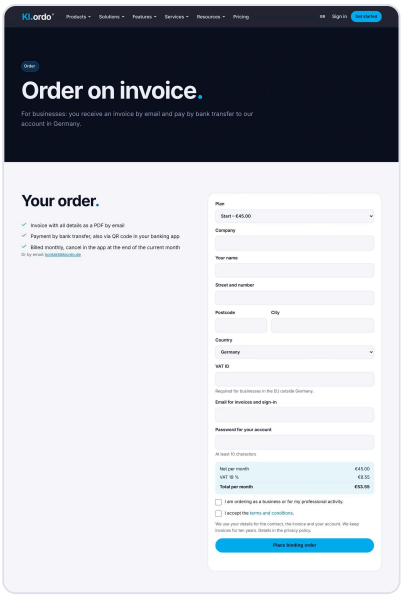


Fig. 3 · The “Order on invoice” form on the website

The invoices include a QR code (GiroCode) that you can scan with your banking app. Billing is monthly; a new invoice follows every month. If the order is set up so that the AI only starts after payment, the app shows “The AI will be activated once the first invoice has been paid.” You can already use all other features. You will find invoices and cancellation in the app under Settings (chapter 21).

Trying it first: the demo access

The pricing page has a **Want to try it first?** box (Fig. 4). ‹**Start demo**› opens a workspace of your own with sample content, without signing up: agents, knowledge, flows, projects and tools. The app’s sign-in page also leads there under “Want to try it first?”.

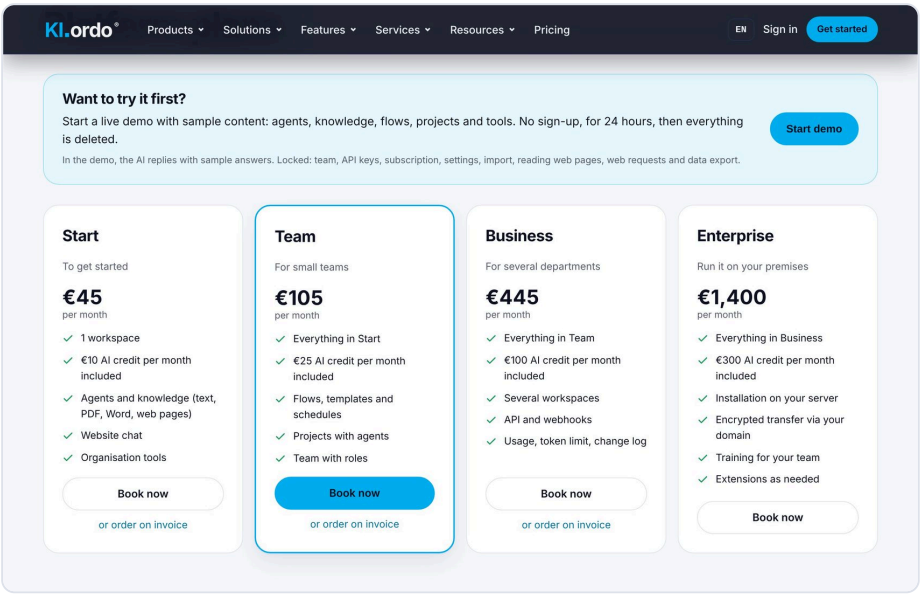


Fig. 4 · The “Want to try it first?” box with “Start demo” on the pricing page

- The demo runs for **24 hours**. At the top of the app, the **demo bar** shows the time remaining, together with ‹**Book now**› and ‹**End demo**›. At the top right it says ‹**Demo access**›.
- The AI replies with **sample answers** instead of real AI.
- Team, API keys, subscription, settings, import, reading web pages, web requests and data export are locked. Files and texts can be up to about 2 MB.

- ‹**End demo**› deletes all content immediately after you confirm. Otherwise KI.ordo deletes the demo automatically when it expires.
- Only a few demos per day can be started from one internet connection. The website tells you when the limit has been reached.

You already have an account

- If an account already exists for the email address on the order, KI.ordo tells you so and shows the sign-in form. After you sign in, the order is added to your account: KI.ordo creates a new, empty workspace with the plan you booked.
- If you are already signed in when you return from Stripe, just enter the **Workspace name** and click ‹**Create workspace**›.

Signing in

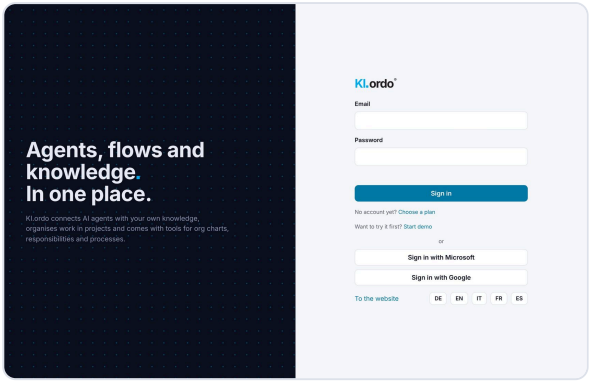


Fig. 5 · Sign-in page with company account sign-in

Enter your email and password, then ‹**Sign in**›. You stay signed in for 14 days. ‹**Sign out**› at the bottom of the left-hand bar ends the session immediately. ‹**Choose a plan**› under “No account yet?” leads to the pricing page.

Signing in with a company account (SSO)

If the provider has set up sign-in with a company account, buttons such as ‹**Sign in with Microsoft**› or ‹**Sign in with Google**› appear under “or”. One click takes you to your company’s sign-in page and then back to KI.ordo, without a separate password.

- KI.ordo matches the sign-in by **email address**. If an account already exists for it, you are signed in to that account.
- If there is no account yet, you will see “There is no account for this email address yet. Please ask an admin for an invitation.” Once you have been invited (chapter 19), sign-in works.
- If the buttons are missing, company account sign-in has not been set up.

Being invited

Additional people do not need their own subscription. An admin invites them under ‹**Team**› and gives them a temporary password (chapter 19).

> **Language:** KI.ordo is available in German, English, Italian, French and Spanish. At the bottom of the sign-in page and at the bottom of the left-hand bar, switch with ‹**DE**›, ‹**EN**›, ‹**IT**›, ‹**FR**› and ‹**ES**›. Without a choice, KI.ordo follows your browser’s language setting.

3 The interface

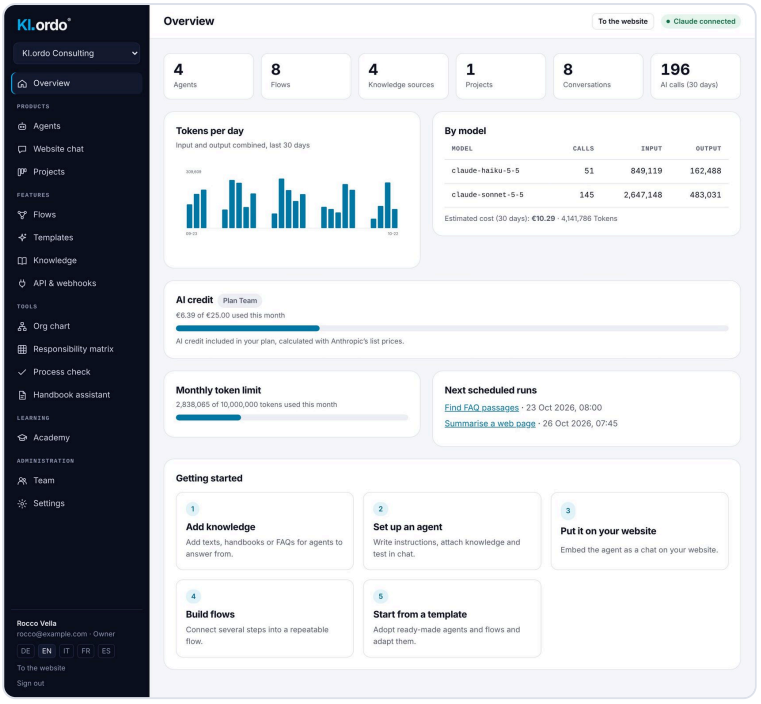


Fig. 6 · Layout: left-hand bar with navigation, header with page title and AI status, content area

ELEMENT	FUNCTION
Workspace (top left)	Shows the current workspace. Use the selector to switch, or create an empty one with ‹ **+ New workspace** ›.
Navigation	Grouped into **Products** (agents, website chat, projects), **Features** (flows, templates, knowledge, API & webhooks), **Tools**, **Learning** (Academy) and **Administration**.
Foot of the bar	Name, email and role, language choice (DE, EN, IT, FR, ES), link to the website, sign out.
Header	Page title, ‹ **To the website** › and AI status: ‹ **Claude connected** ›, ‹ **AI not connected** › or, in the demo access, ‹ **Demo access** ›.

On a smartphone

On narrow screens the navigation is collapsed. The icon with three lines at the top left opens it; tapping an entry closes it again.

Light and dark

Under ‹**Settings**› › Appearance choose **Automatic** (like your operating system), **Light** or **Dark**. The choice applies to this browser.

Using the keyboard

KI.ordo can be used entirely with the keyboard. The first press of **Tab** shows ‹**Skip to content**›; after every page change, focus is on the heading. In the chat, **Enter** sends the message and **Shift + Enter** starts a new line. **Escape** closes dialogs and the menu. More in chapter 27.

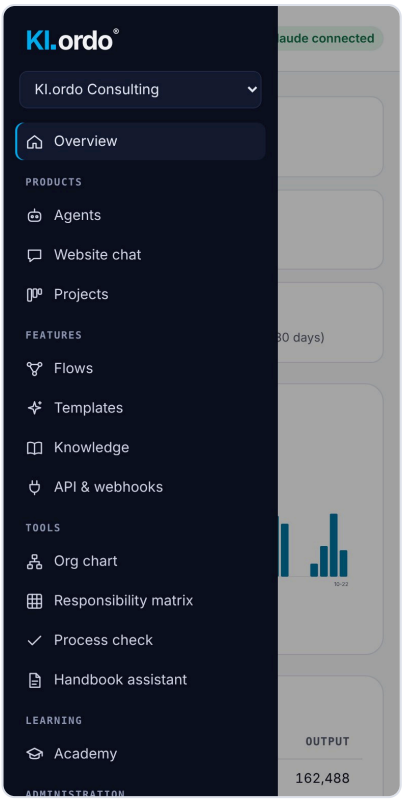


Fig. 7 · Open navigation on a smartphone

4 Overview.

The start page summarises the workspace (Fig. 6):

- **AI temporarily not connected:** This card appears at the very top only when the AI cannot be reached at the moment. All features remain available, but the AI only returns sample answers; your content is kept. You do not need to do anything; the provider takes care of it.
- **Key figures:** number of agents, flows, knowledge sources, projects, conversations and AI calls in the last 30 days.
- **Tokens per day:** bars for the amount of text processed (input and output) over the last 30 days. Hover over a bar to see the value.
- **By model:** calls and tokens per Claude model. If you have entered prices under Settings, a cost estimate in euros appears below.
- **AI credit:** the credit included in your plan and how much of it has been used this month (Fig. 8, chapter 21). The card is not shown in the demo access.
- **Monthly token limit:** a bar showing usage in the current calendar month, if a limit has been set under Settings (chapter 20). It turns orange at 80% and red at 100%.
- **Next scheduled runs:** the next five flows with a schedule and their date (chapter 7).
- **Getting started:** five tiles leading to knowledge, agents, website chat, flows and templates.



Fig. 8 · The "AI credit" card with plan and usage in the current month

Tokens are the unit AI providers bill in. As a rule of thumb, one token is roughly four characters of English text.

PART B

Features.

Each feature with its purpose, step-by-step instructions, all fields and practical tips.

5 Knowledge

Under ‹**Knowledge**› you collect the texts your agents should rely on: service descriptions, frequently asked questions, internal rules, handbooks – also as PDF or Word files or straight from a web page. KI.ordo splits each source into sections of about 900 characters that overlap slightly. For every question, KI.ordo picks out the best-matching sections and passes them to the agent. The agent cites the source of its answer in square brackets, e.g. [1].

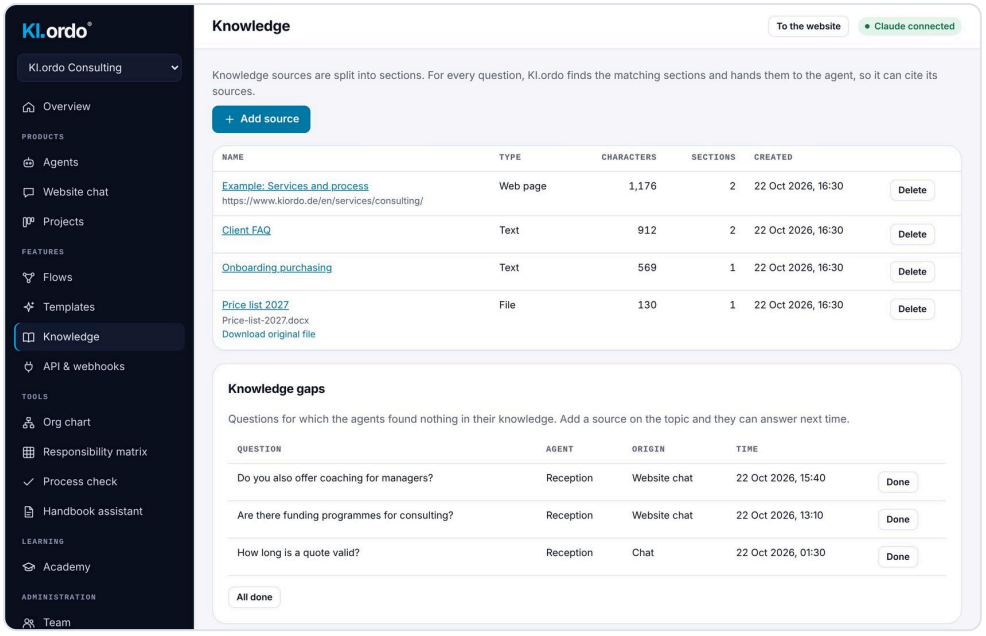


Fig. 9 · List of knowledge sources with type, origin, number of characters and sections

Adding a source

‹**Add source**› opens a dialog with three tabs. Switch between tabs by clicking or with the arrow keys.

TAB	HOW IT WORKS
Text	Give it a **Name** and paste the text into **Content** (at least 20 characters). The name later appears in source citations, so choose a meaningful one, e.g. “Frequently asked customer questions”.
File	Choose a file: **PDF**, **Word (DOCX)**, TXT, Markdown, CSV, JSON or HTML up to 20 MB. KI.ordo extracts the text. Without a name of your own, the file name is used.
Web page	Enter the address with `https://`. **This page only** reads one page; **All pages from the sitemap (up to 50)** reads up to 50 pages of a website whose sitemap you enter (usually `https://your-domain.com/sitemap.xml`). Each page becomes its own source with its address as the origin.

‹**Add**› saves. KI.ordo reports how many sections or pages were saved.

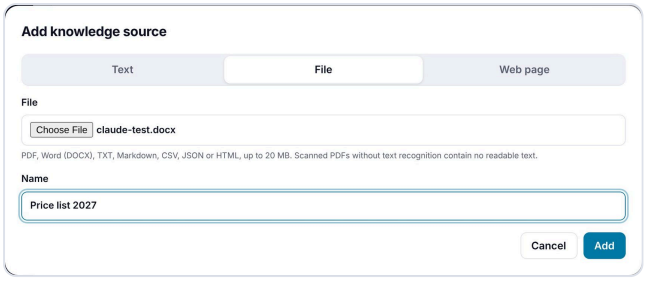


Fig. 10 · The “File” tab with a Word file selected

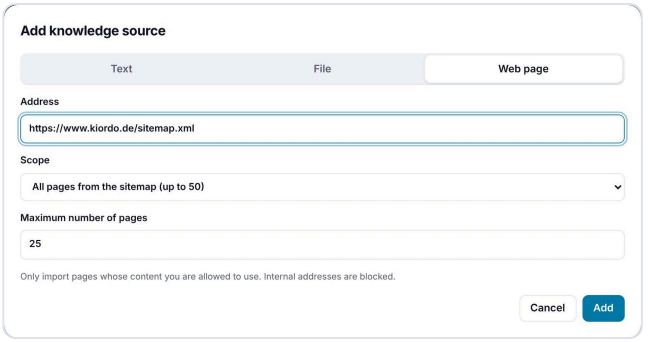


Fig. 11 · The “Web page” tab with a sitemap

> **Import limits:** Scanned PDF files without text recognition contain no readable text; save them with text recognition in Preview or Acrobat first. Save old Word files (`.doc`) as `.docx` in Word or Pages. Only import web pages if you are allowed to use their content; pages on your own network (e.g. `192.168.…`) are blocked.

Viewing, replacing and deleting a source

- Clicking the **name** shows all sections exactly as the agent receives them.
- ‹**Download original file**› below the name downloads the uploaded file (PDF, Word …) unchanged. The link only appears if the provider has set up external storage, and only for files uploaded after that (Fig. 12).
- A source cannot be edited. To update it, add the new version, assign it to the agents and remove the old one with ‹**Delete**›.

NAME	TYPE	CHARACTERS	SECTIONS	CREATED	
Example: Services and process https://www.kiordo.de/en/services/consulting/	Web page	1,176	2	22 Oct 2026, 16:30	Delete
Client FAQ	Text	912	2	22 Oct 2026, 16:30	Delete
Onboarding purchasing	Text	569	1	22 Oct 2026, 16:30	Delete
Price list 2027 Price-list-2027.docx Download original file	File	130	1	22 Oct 2026, 16:30	Delete

Fig. 12 · The source “Price list 2027” from a Word file with the “Download original file” link

Knowledge gaps

If an agent has knowledge assigned but finds no matching section for a question, KI.ordo records the question under **Knowledge gaps**, with agent, origin (chat, website chat, API, flow, projects) and time. This shows you which topics are missing from your knowledge.

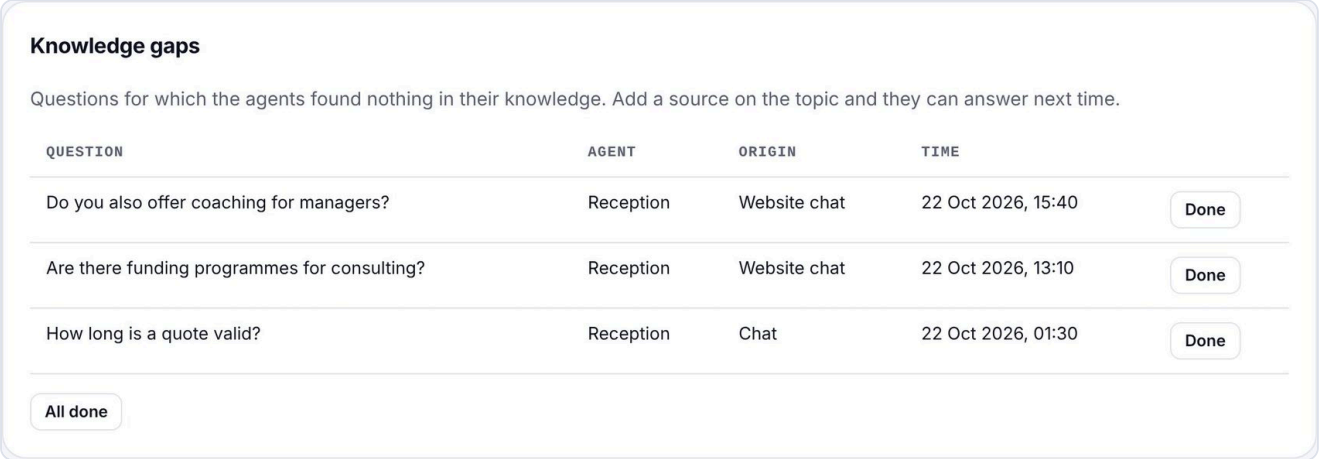


Fig. 13 · Open knowledge gaps with agent and origin

1. Read the list regularly, for example weekly.
2. For recurring questions, add a source or extend an existing one and assign it to the agent.
3. Tick off the question with ‹**Done**›. ‹**All done**› empties the list.

Testing the search

In the **Test search** field you can check which sections KI.ordo finds for a question. The number after the name is the match score: the higher, the better the match. If the search finds nothing useful, the agent will also answer poorly. It then helps to include your customers’ own wording in the text.

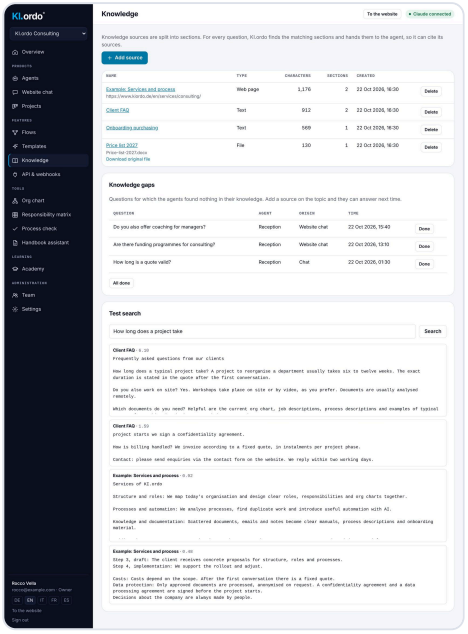


Fig. 14 · “Test search” with results and match score

Writing good knowledge

- **One statement per paragraph.** Short paragraphs end up complete in a single section.
- **Question and answer together:** “How long does a project take? Usually six to twelve weeks.” This way the search matches typical questions.
- **Use your customers’ words**, not just internal jargon. The search works with words, not meanings.
- **Nothing confidential** in sources used by a public website chat.

6 Agents

An agent is an AI assistant with fixed instructions, a model and selected knowledge. Under ‹**Agents**› you see all agents as tiles. The green **Website** badge shows that the website chat is switched on.

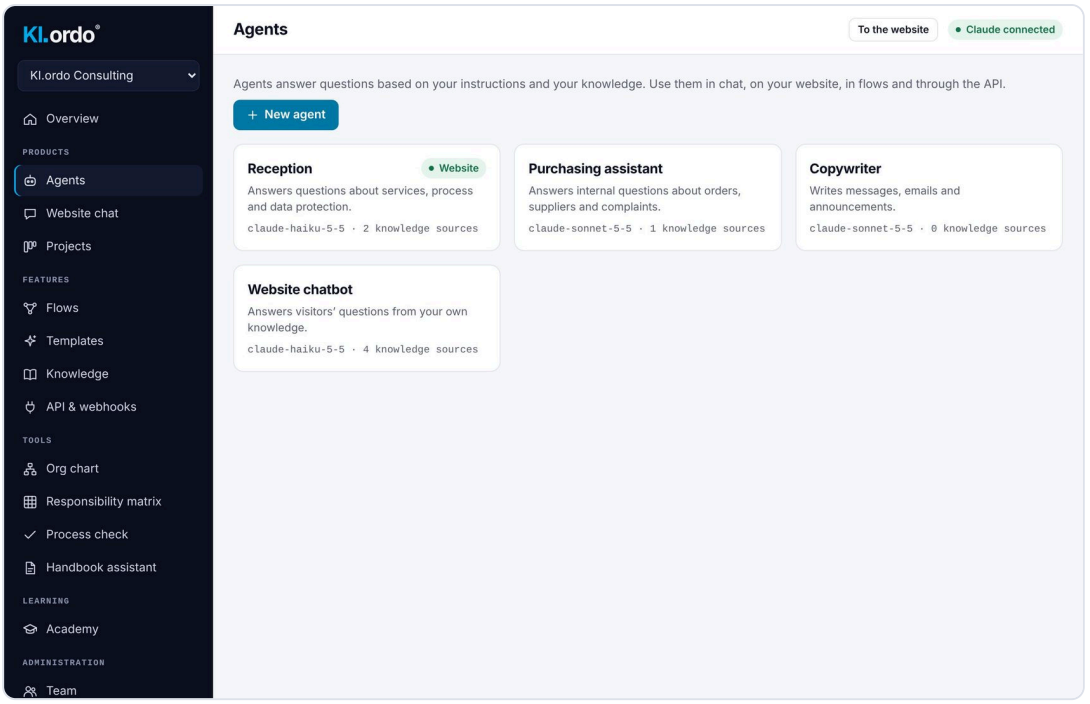


Fig. 15 · List of agents with model and number of knowledge sources

Creating an agent

1. Click ‹**New agent**›. KI.ordo creates an agent with default values and opens it.
2. Fill in the fields on the left (table below).
3. ‹**Save**›.
4. Test it in the chat on the right.

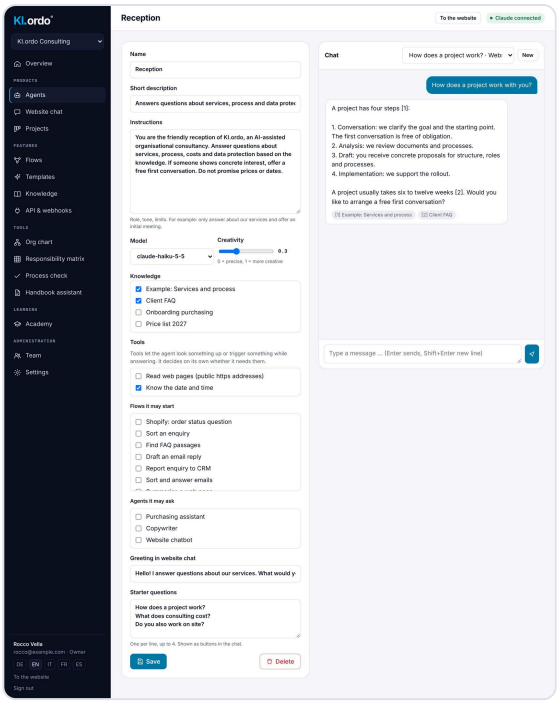


Fig. 16 · The “Reception” agent: settings with tools and starter questions on the left, chat with sources on the right

FIELD	MEANING AND TIP
Name	Appears in lists, as the title in the website chat and in flows.
Short description	One sentence for your team: what is the agent for?
Instructions	The most important field. Role, tone, tasks and limits in full sentences. Up to 20,000 characters. See the example below.
Model	Which Claude model answers. The provider decides which models are available; the first one is the default. Larger models answer more thoroughly, smaller ones faster and more cheaply.
Creativity	0 to 1. Low (0 to 0.3) for factual information, higher (0.6 to 0.8) for texts and ideas.
Knowledge	Tick the knowledge sources the agent may use. Without ticks it answers only from its instructions and general knowledge.
Tools	What the agent may do by itself while answering (see below). Without ticks it answers only with knowledge and instructions.
Greeting in website chat	The first sentence visitors see in the chat window.
Starter questions	Up to four suggestions, one per line. They appear as buttons in the website chat and in the test chat until the first question is asked.

Tools

With tools, an agent can look something up or trigger something while it answers. It decides for itself whether it needs a tool; the answer then shows **Tools used: …** underneath.

TOOL	EFFECT
Read web pages	The agent may fetch public https pages, such as an address from the question. Internal addresses are blocked.

Know the date and time	The agent knows the server's current date and time, e.g. for "Are you open today?".
Flows it may start	The agent can start the ticked flows with an input and use their result.
Agents it may ask	The agent can ask the ticked agents for information, such as a specialist agent with its own knowledge.

> Tools only work with Claude connected, not with sample answers (demo access or AI not connected). Every tool call costs extra tokens; give a public website agent only the tools it really needs.

Good instructions

```
You are the friendly reception of KI.ordo, an AI-assisted
organisational consultancy. Answer questions about services,
process, costs and data protection based on the knowledge.
If someone shows concrete interest, offer a free first
conversation. Do not promise prices or dates.
```

- **State the role:** "You are …".
- **Narrow the task:** what the agent should and should not answer.
- **Spell out what is not allowed:** no price commitments, no legal advice, no appointments.
- **Set the next step:** e.g. "offer a free first conversation" or "refer to the team lead".

In addition, KI.ordo gives every agent fixed ground rules: answer in the language of the question, stay factual and concise, cite sources in square brackets and say openly when the knowledge does not answer a question.

Chat and conversations

- Type your message at the bottom; **Enter** sends it. The answer appears word by word.
- The **sources** appear below the answer. Hover over them to see the text excerpt.
- The selector at the top of the chat lists all previous **conversations** with their origin: **App** (here in the chat), **Website chat** or **API**. This lets you read what visitors asked.
- ‹**New**› starts a new conversation. Within a conversation, the agent knows the last 20 messages.

Deleting: ‹**Delete**› removes the agent with all its conversations. Flows that use it will then report "Agent not found".

7 Flows

A flow combines several steps into a repeatable process. Each step is a **building block**. A flow always begins with the **Input** block, receives a text and returns a text at the end. In between, it can search knowledge, give Claude a task, ask agents, classify texts, check conditions, read web pages, start other flows, give a task to an AI team with a lead and call other programs. For flows with a schedule, the list shows the next run; ‹**Templates**› leads to ready-made flows (chapter 9).

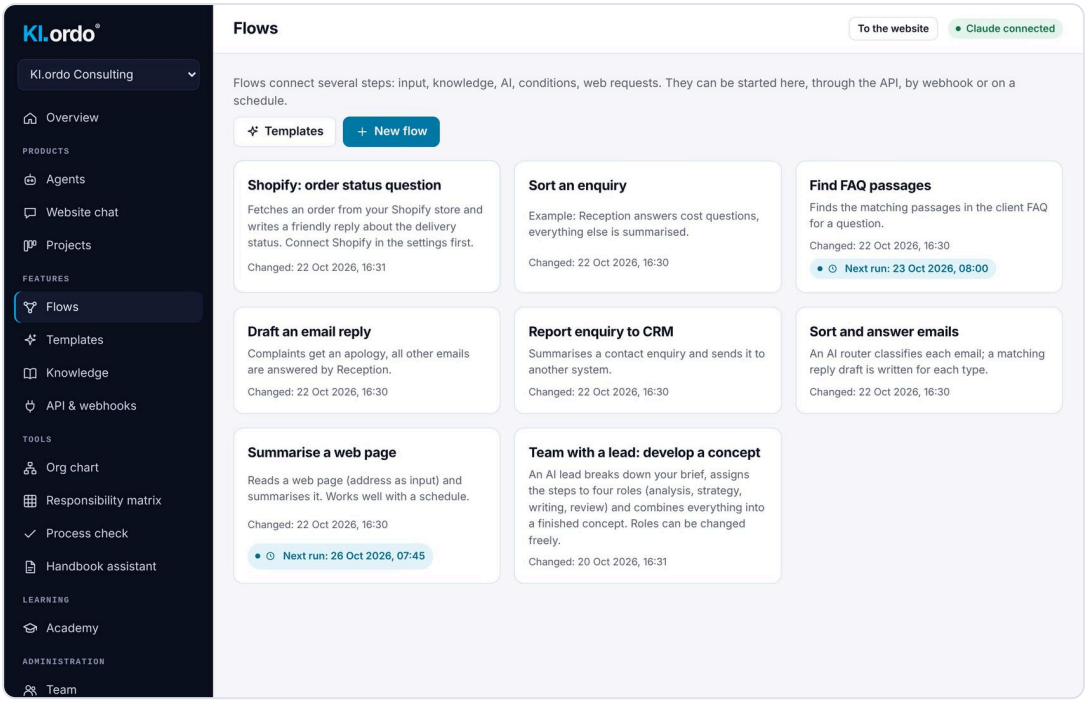


Fig. 17 · List of flows

The editor

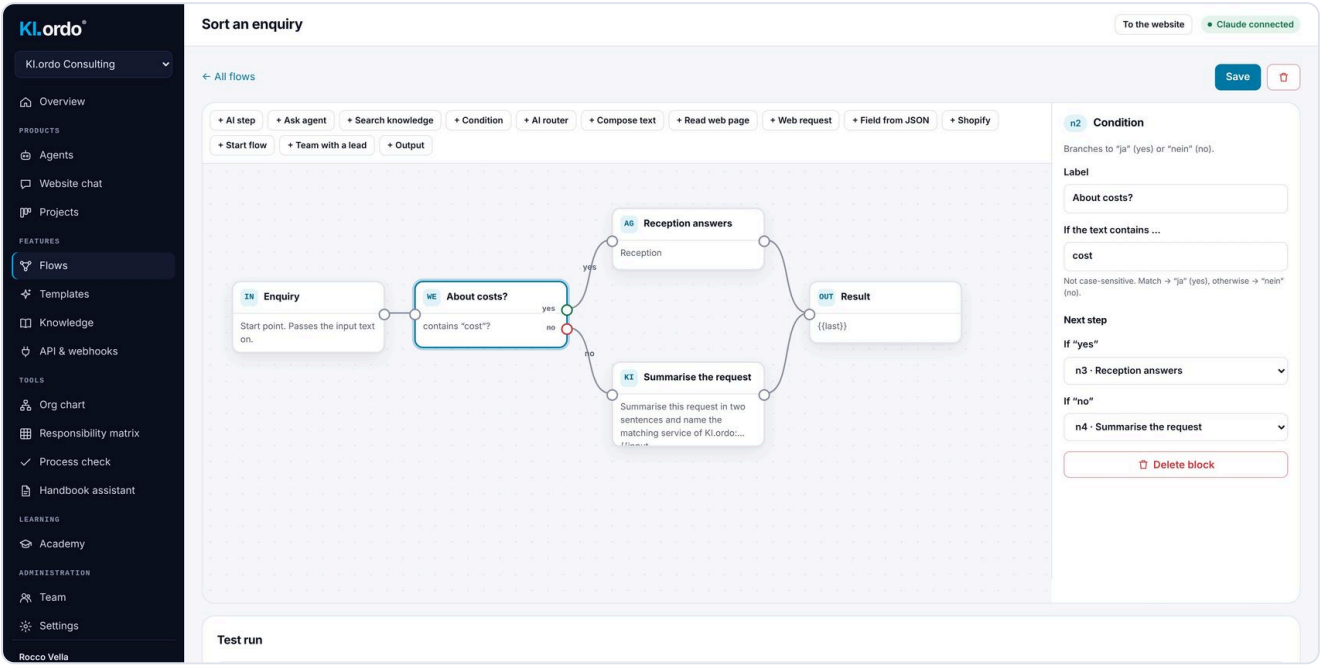


Fig. 18 · Flow editor: block bar at the top, canvas in the middle, properties on the right, test run below

AREA	FUNCTION

Block bar	Clicking ‹+ AI step›, ‹+ Ask agent› and so on places the block on the canvas.
Canvas	Drag blocks by their header to arrange them. Each block has an input (dot) on the left and one or more outputs on the right: the condition has two (yes, no), the AI router one per category plus “other”.
Properties	Shows the settings of the selected block. With nothing selected: name and description of the flow.
Test run	Type a test input, then ‹Test run›. Each step appears with its result and duration.
Schedule, recent runs	Below the test run: have the flow start automatically and read the last 30 runs (see below).

Building a flow

1. Under ‹Flows›, click ‹New flow›. KI.ordo creates a template made of input, AI step and output.
2. On the right under **Flow**, enter a name and description.
3. Add blocks from the bar and arrange them.
4. **Connect:** click the right-hand dot (output) of a block, then the left-hand dot (input) of the next one. Or, more simply: click a block and choose the next block on the right under **Next step**.
5. Click each block and set it up on the right.
6. ‹Save›. You can spot unsaved changes by the dot after “Save •”.
7. Enter a test input at the bottom and click ‹Test run›. An unsaved flow is saved automatically first.

Rules for connections

- Each output has **exactly one** connection. If you connect it again, the new connection replaces the old one.
- An input may have **several** connections, e.g. when two branches join again.
- The **condition** has two outputs: **yes** at the top (green), **no** at the bottom (red). The **AI router** has one labelled output per category and **other** at the bottom.
- To delete a connection: click the line, then ‹Delete connection› on the right. Or choose “– not connected –” under **Next step**.
- **With the keyboard:** reach blocks with **Tab**, **Enter** selects, the **arrow keys** move them (with Shift in larger steps).
- The **Output** block ends the flow. Without it, the result of the last step is the result.
- A flow runs at most 40 steps. This prevents endless loops.

Placeholders

In the text fields of blocks, insert results of earlier steps with double curly brackets:

PLACEHOLDER	REPLACED BY
`{{input}}`	the text the flow was started with
`{{last}}`	the result of the immediately preceding step
`{{n2}}, {{n3}}` …	the result of the block with this ID. The ID is shown in the blue field at the top of the properties (e.g. `n2`).

`{{datum}}, {{uhrzeit}}`	date and time of the run in the server's time zone, e.g. 16.10.2026 and 08:00
`{{heute}}`	the date in the form 2026-10-16, handy for file names and other programs
`{{kategorie}}`	the category chosen by the last AI router

Reading a test run

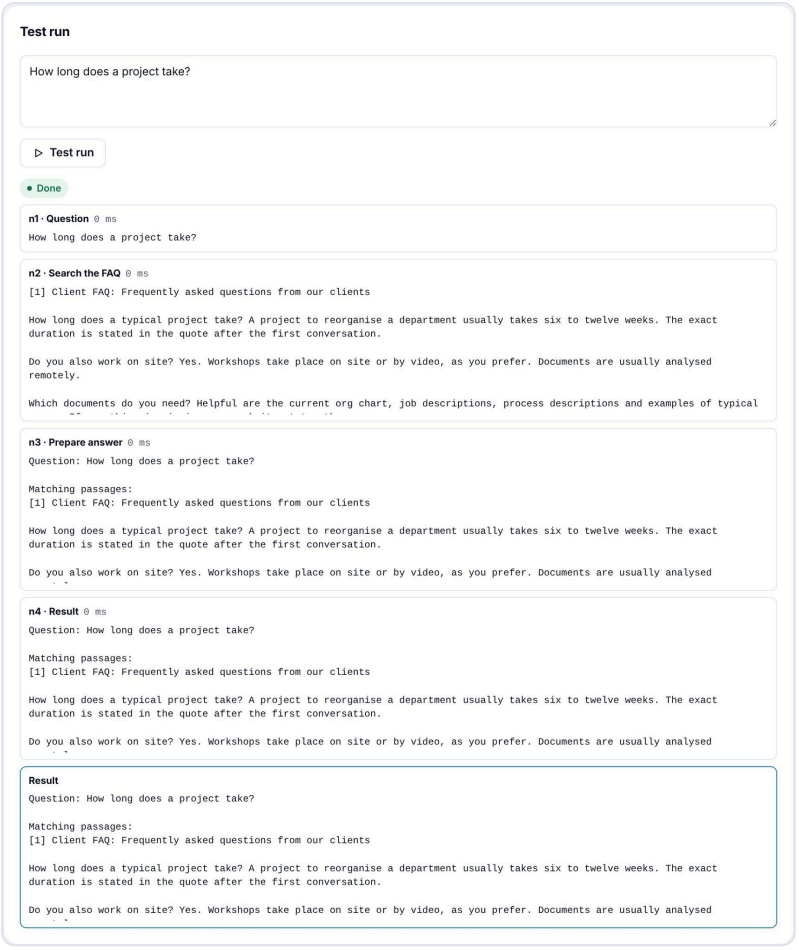


Fig. 19 · Test run: status, each step with ID, label, duration and result, the overall result at the very bottom

After the test run, the blocks that ran are marked on the canvas, a failed one in red. For conditions and AI routers, the log shows which branch was taken (e.g. **yes**, **Question** or **other**). If an error occurs, the flow stops at that point; the message gives the reason. Long test runs, for example with the **Team with a lead** block, also run to the end; until then it shows "Running …".

Starting flows

ROUTE	HOW	CHAPTER
Test run	In the editor, for people with the Editor role or higher.	7
MCP	From Claude or Claude Code with the `run_flow` tool.	12
API	`POST /api/v1/flows/ID/run` with an API key.	12
Webhook	A secret address per flow, no key needed. Ideal for forms, Zapier, Make, n8n or Shopify webhooks.	12, 13

Schedule	Automatically hourly, daily, on weekdays or weekly at a fixed time.	7
Agent	An agent with the “Flows it may start” tool.	6
Another flow	Via the **Start flow** block.	8

Schedule

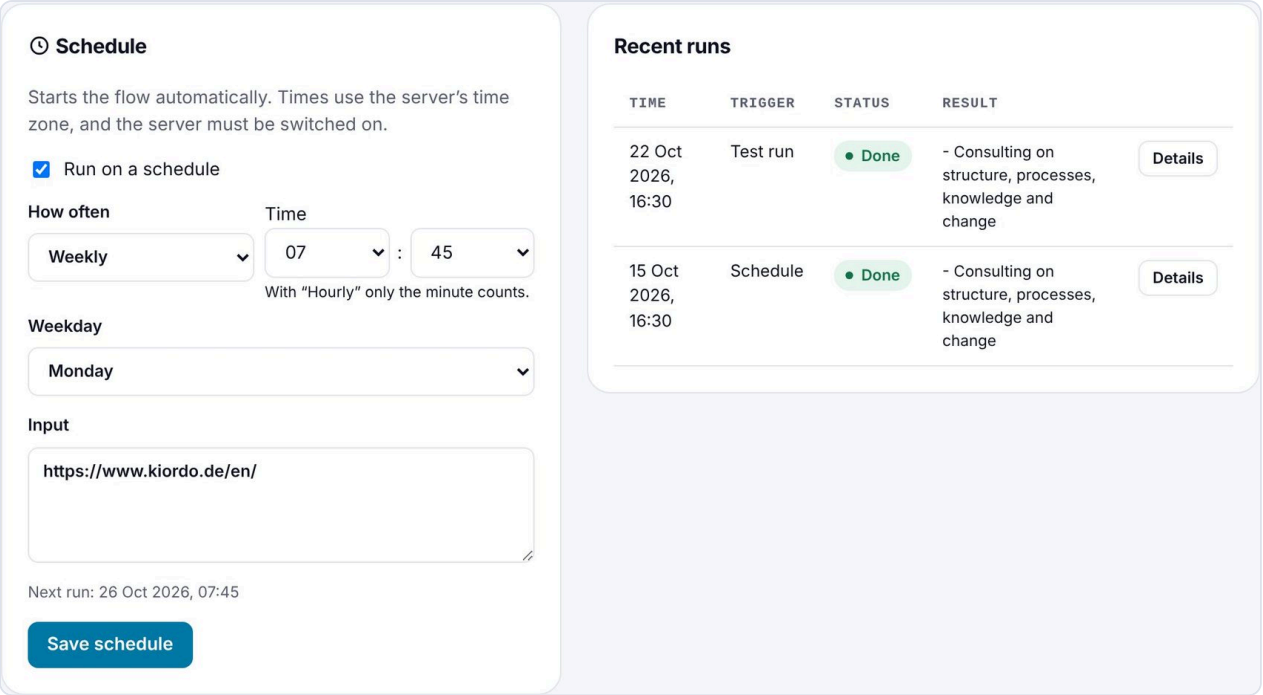


Fig. 20 · Schedule (weekly on Mondays at 07:45) and recent runs with trigger

1. In the flow, tick **Run on a schedule** in the **Schedule** card at the bottom.
2. Choose **How often**: Hourly, Daily, Weekdays (Mon–Fri) or Weekly; for “Weekly”, also the **Weekday**.
3. Choose the **Time** with hour and minute. For “Hourly” only the minute counts: 15 means 8:15, 9:15, 10:15 …
4. Under **Input**, enter the text every run starts with, e.g. a web address.
5. ‹**Save schedule**›. The next date is shown below.

> Schedules run on the server, not on your computer, so your computer can be switched off. If the server is not running at the scheduled time, for example during maintenance, the run is skipped; KI.ordo continues at the next regular time. KI.ordo checks every 30 seconds whether a run is due. The time follows the server’s time zone.

Recent runs

Every run is saved with time, **trigger** (test run, API, webhook, schedule, agent, sub-flow, MCP, Shopify), status, input, result and the log of all steps. ‹**Details**› shows everything in a window. The list shows the last 30 runs.

8 The building blocks in detail.

Every block has a **Label** field; it appears on the canvas and in the log. The other fields:

BLOCK	FIELDS	WHAT IT DOES
`IN` **Input**	–	Starting point, exactly once per flow. Passes on the input text. Cannot be deleted.
`KI` **AI step**	Model · Role (optional) · Prompt	Sends the **prompt** to Claude and passes on the answer. The **role** sets how Claude behaves (“You are an editor”). Answer length up to about 1,500 tokens. Without a prompt, `{{last}}` is sent.
`AG` **Ask agent**	Agent · Question for the agent	An agent answers with its instructions and knowledge, just as in the chat. Ideal if you already maintain knowledge and tone in the agent.
`WI` **Search knowledge**	Sources · Search query · Number of results (1–10)	Searches the chosen sources and passes on the results as numbered text, e.g. “[1] Frequently asked questions: …”. Works without Claude, so it is free and fast.
`WE` **Condition**	If the text contains …	Checks whether the result of the **previous** step contains the search word (not case-sensitive). Match → output **yes**, otherwise **no**. The text is passed on unchanged. Tip: use the word stem, e.g. `cost` for cost, costs, costing.
`KE` **AI router**	Categories (one per line, up to 8) · Hint for the AI · Text to classify · Model	Claude assigns the text to exactly one category, such as *Question*, *Complaint*, *Order*. Each category has its own output, plus **other** if nothing fits. The text is passed on unchanged; the choice is available in `{{kategorie}}`. More reliable than a condition when customers phrase things freely.
`TX` **Compose text**	Text	Builds a text from fixed parts and placeholders, e.g. to add a closing or combine several results.
`URL` **Read web page**	Address (https), also as a placeholder such as `{{input}}`	Fetches a public page and passes on its title and readable text (up to 20,000 characters), without menus and scripts. Combines well with an AI step “Summarise” and a schedule.
`WEB` **Web request**	Address (https) · Method (POST/GET) · Body (optional, JSON)	Calls an internet address. Without a body of your own, **POST** sends `{"input": …, "last": …}` as JSON; with a body of your own, exactly that body; placeholders are allowed. The response (up to 20,000 characters) is passed on. If the other side responds with an error, the flow stops with that message. Only https, 10-second time limit, internal addresses (e.g. 192.168.…) are blocked.

`{ }` **Field from JSON**	Field (path) · Source · Fallback	Reads a value from JSON, for example from the response of a web request or an AI step. Dots separate levels, numbers select list entries: `customer.name`, `items.0.title`. If the field is missing, the fallback applies, or an empty text if there is no fallback. If the source is not JSON at all, the flow reports an error.
`SHOP` **Shopify**	Query · Search term	Queries your Shopify shop: **Order by number**, **Orders by email**, **Search products** or **Shop details**. The search term is an order number, email address or product name, default `{{last}}`. The result is JSON. Shopify must be connected under Settings (chapter 13).
`SUB` **Start flow**	Flow · Input for the flow	Starts another flow and takes over its result. This lets you build reusable parts, such as “closing and signature”. At most three levels deep; a flow cannot start itself.
`TEAM` **Team with a lead**	Brief for the team · Roles in the team · Agents in the team · Note for the lead · Maximum work steps (1–6) · Result · Model	An AI lead breaks the brief down into work steps, assigns them to roles or agents and combines the results. Details below.
`OUT` **Output**	Text	Sets the result and ends the flow. The default is `{{last}}`.

Keeping an eye on costs: Only the **AI step**, **Ask agent**, **AI router** and **Team with a lead** blocks use Claude and incur costs; for the **Start flow** block, the AI blocks of the started flow count. All other blocks run without AI.

Typical patterns

PATTERN	BUILDING BLOCKS
Answer from your own knowledge	Input → Search knowledge → AI step (“Answer {{input}} using only these passages: {{last}}”) → Output
Classify and branch	Input → AI router (Complaint, Question, Order) → one branch per category
Monitor a web page	Input (address) → Read web page → AI step “What is new or important?” → Output, weekly on a schedule
Customer question about an order	Input (order number) → Shopify “Order by number” → AI step “Reply on delivery status” → Output (template, chapter 13)
Data from another system	Input → Web request (GET) → Field from JSON → Compose text → Output
Writing in stages	Input → AI step “Outline” → AI step “Text based on outline {{last}}” → AI step “Shorten to 150 words” → Output
Reporting to another system	Input → AI step “Summarise” → Web request → Output
Large brief for a team	Input (brief) → Team with a lead (e.g. Analysis, Strategy, Writing, Review) → Output (template “Team with a lead: develop a concept”, chapter 9)

Tip: for yes/no checks on fixed words, a condition is enough. As soon as customers phrase things freely, the AI router is more reliable.

The “Team with a lead” block

Some briefs are too big for a single AI step: a concept, an analysis, a long text. The **Team with a lead** block works like a small project group:

1. **Planning:** The AI lead breaks the brief down into work steps and gives each step to the most suitable member. Not every member has to do something; some get several steps.
2. **Work steps:** The steps run one after another. Each member sees the overall brief and the team’s results so far.
3. **Summary:** The lead checks all results, resolves or flags contradictions and delivers the finished overall result.

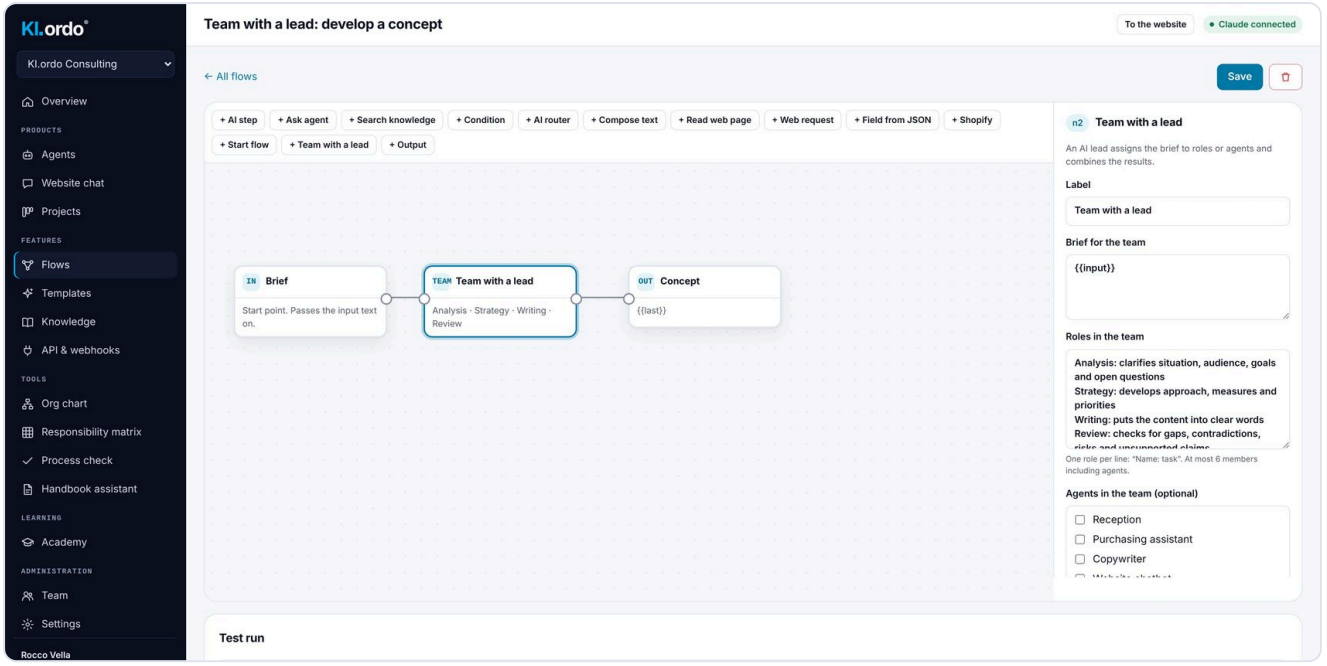


Fig. 21 · The “Team with a lead” block in the flow editor; its settings on the right

FIELD	MEANING
Brief for the team	What the team should produce. The default is `{{last}}`, i.e. the result of the previous step.
Roles in the team	One role per line in the form “Name: task”, e.g. “Writer: writes the draft”. A new block comes with three roles: Research, Writer and Editor. At most 6 members, including agents.
Agents in the team (optional)	Tick existing agents. They contribute with their own instructions and knowledge.
Note for the lead (optional)	An extra instruction for the lead, e.g. “Keep the tone consistent.”
Maximum work steps	1 to 6. Each step is a separate AI call; planning and summary come on top.
Result	**Lead combines the results** (default) or **Result of the last step**. The second option saves the call for the summary.
Model	The Claude model for the lead and the roles.

In the test run and under “Recent runs”, the log first shows the lead’s **Plan** with all work steps, then one entry per team member with their result. If the AI does not return a usable plan, for example with sample answers, the members work through the brief one after another in the order given.

> **Usage:** A team with three work steps and a summary needs five AI calls. If the order is fixed anyway, such as research, draft, revision, several AI steps in a row are enough; this is how the “Sequential team: research, draft, revision” template works (chapter 9).

9 Templates and example flows

Templates

Under ‹**Templates**› you will find 56 ready-made templates for typical tasks: 50 flows and 6 agents. The buttons at the top filter by **agents**, **flows** or one of the eight areas: Communication, Organisation, Sales, Automation, Knowledge, Legal and compliance, Security, and Data and analysis.

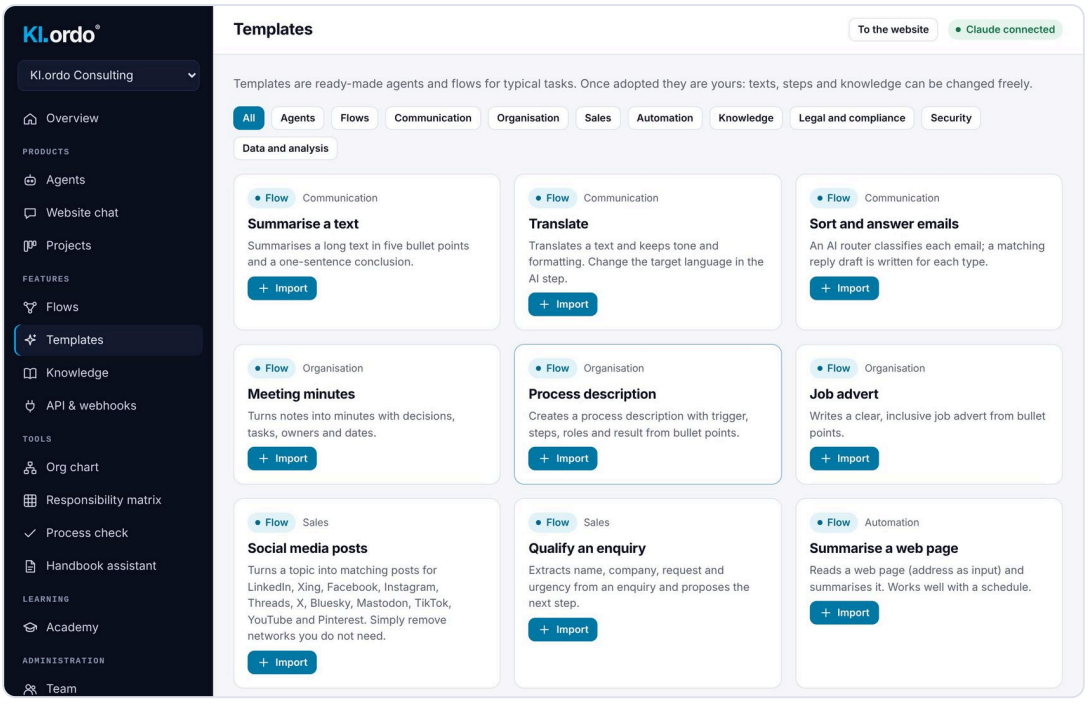


Fig. 22 · Templates with type, topic and description

1. Click ‹**Import**› on the template you want (Editor role or higher).
2. KI.ordo creates a new agent or flow in the language of the interface and opens it. For the “Website chatbot with your own knowledge” template, the Website chat page opens instead (see below).
3. Adjust texts, steps, knowledge and model, test, ‹**Save**›.

AREA	TEMPLATES
Communication	Summarise a text · Translate · Sort and answer emails · Rewrite a paragraph · Prepare a book for Amazon KDP · Check and improve readability · Structure a raw text · Proofreading · Report from bullet points · Sequential team: research, draft, revision · Agents: Website customer service, Copywriter
Organisation	Meeting minutes · Process description · Job advert · Brag book · Feedback on a piece of work · Team with a lead: develop a concept · Agent: Onboarding companion
Sales	Social media posts · Qualify an enquiry · Shopify: order status question · Account-based marketing plan · Enrich company data · Check a website for AI search (GEO) · Plan a market launch (go-to-market) · Derive target groups (segmentation) · Route an enquiry (lead routing) · Personalised customer message · Sales call guide · Estimate market size (TAM/SAM/SOM) · Agent: Research assistant
Automation	Summarise a web page · Send to another system · Classify a text

Knowledge	Answer from knowledge · Fact-check against your own knowledge · Write instructions for an agent (metaprompt) · Agents: Internal knowledge assistant, Website chatbot with your own knowledge
Legal and compliance	Review a contract · Draft a compliance report
Security	Chatbot security audit · AI firewall: check input
Data and analysis	Find anomalies in data · Compare models (benchmark) · Check a suspicious order · Group requests by topic · Clean up a list · Validate data · Extract names, companies, places and dates · Extract details from a document · Analyse a table · Calculate the benefit of AI (ROAI) · Analyse sentiment · Generate test questions (synthetic data)

The “Send to another system” template contains a placeholder address. Enter the webhook address of your target system before using the flow. The “Shopify: order status question” template needs a Shopify connection (chapter 13). Templates that rely on your knowledge assign the existing knowledge sources when you import them; check the selection in the agent.

Website chatbot with your own knowledge (agent)

A ready-made chatbot for your website: it answers only from your knowledge sources, cites the sources and offers a handover to your team when needed. It comes with a greeting and three starter questions and uses a low-cost model for the website chat. After ‹**Import**›, the ‹**Website chat**› page opens straight away with the list “Embed the chatbot in four steps” (chapter 11).

Teams of AI roles

- **Sequential team: research, draft, revision** (Communication): three AI steps in a fixed order. The first gathers facts and an outline, the second writes the draft, the third makes it natural and readable. Open points are marked [check] in the text.
- **Team with a lead: develop a concept** (Organisation): a **Team with a lead** block with four roles (Analysis, Strategy, Writing, Review). The lead distributes the work and combines everything into a finished concept. You can change the roles as you like (chapter 8).

9.0 Sort and answer emails (template)

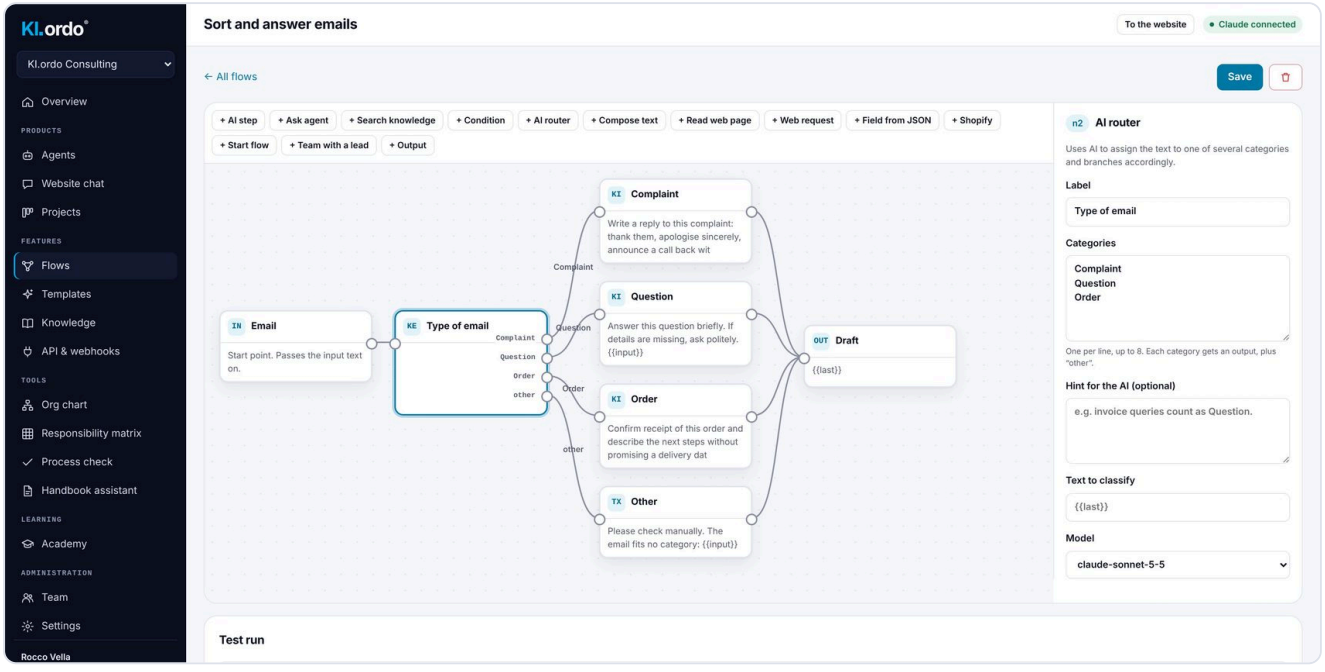


Fig. 23 · AI router “Type of email” with three categories and “other”; the categories on the right

Input “Email” → **AI router** “Type of email” (Complaint, Question, Order) → one **AI step** per category with a suitable reply draft; for “other”, a **text** saying “Please check manually” → **Output** “Draft”.

9.1 Sort an enquiry (included in every new workspace)

Questions about costs are answered by the “Reception” agent; all other requests are summarised by an AI step (Fig. 18).

ID	BUILDING BLOCK	SETTING
n1	Input “Enquiry”	–
n2	Condition “About costs?”	contains `cost` → yes: n3, no: n4
n3	Ask agent “Reception answers”	Agent: Reception · Question: `{{input}}`
n4	AI step “Summarise the request”	“Summarise this request in two sentences and name the matching service of KI.ordo: {{input}}”
n5	Output	`{{last}}`

9.2 Find FAQ passages (no AI costs)

Finds the matching passages in the client FAQ for a question, for example to prepare your own answer. The test run in Fig. 19 comes from this flow.

Input → **Search knowledge** (source “Client FAQ”, search query `{{input}}`, 2 results) → **Compose text** (“Question: {{input}} / Matching passages: {{n2}}”) → **Output**.

9.3 Draft an email reply

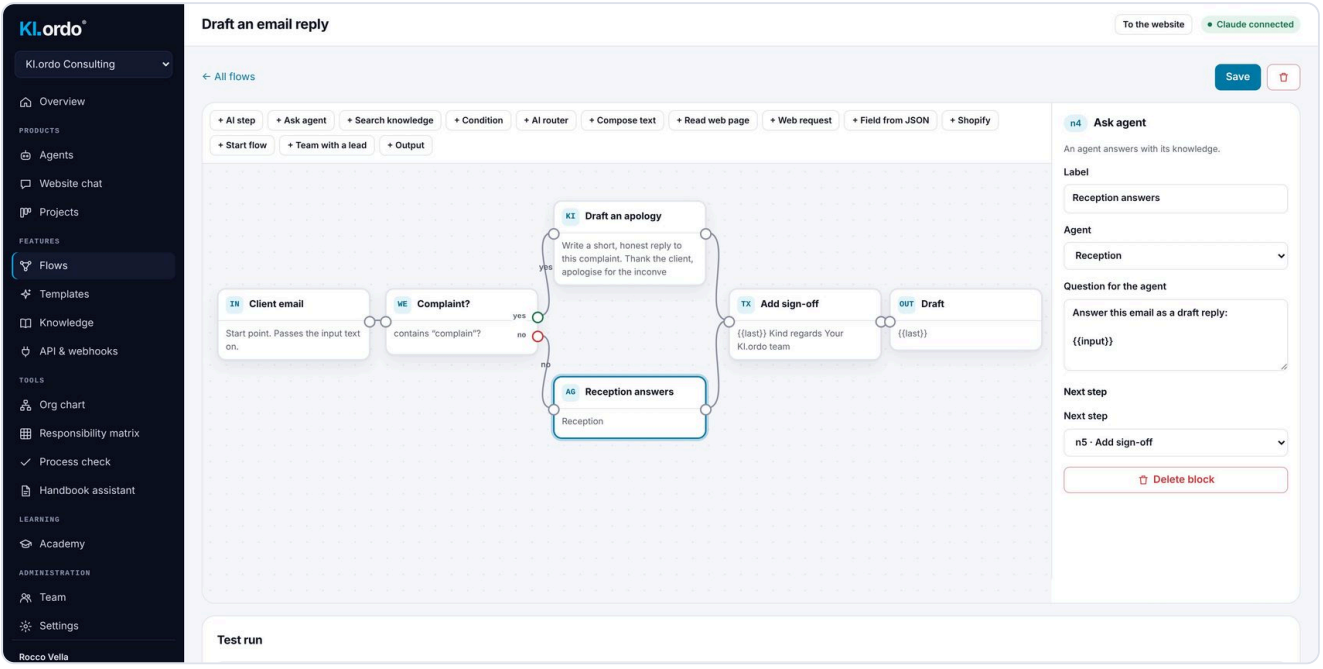


Fig. 24 · Complaints get an apology, everything else is answered by Reception; both branches get the same sign-off

1. **Input** “Client email”: the text of the email.
2. **Condition** “Complaint?”: contains `complain`.

3. Branch **yes**: **AI step** “Draft an apology” with the role “You write on behalf of KI.ordo, friendly and factual.” and the prompt “Write a short, honest reply to this complaint … {{input}}”.
4. Branch **no**: **Ask agent** “Reception answers” with “Answer this email as a draft reply: {{input}}”.
5. Both branches lead into **Compose text** “Add sign-off”: `{{last}}` plus “Kind regards, Your KI.ordo team”.
6. **Output** “Draft”.

9.4 Report an enquiry to a CRM

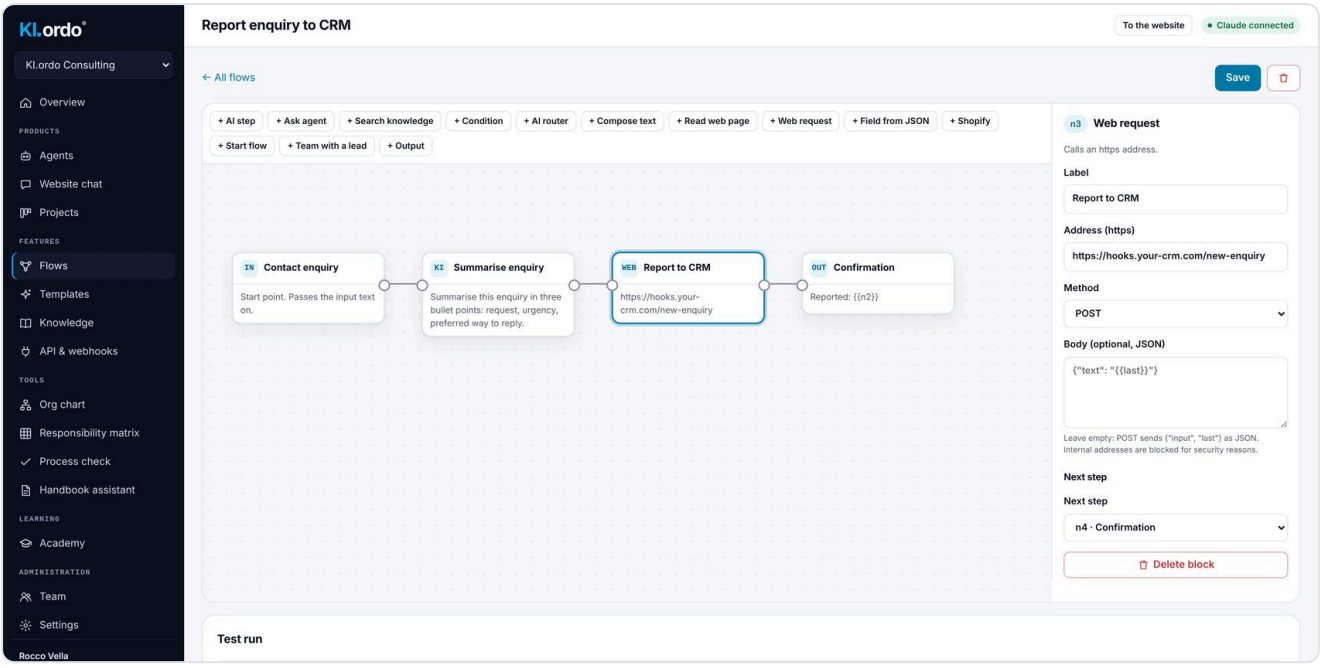


Fig. 25 · Web request: address and method on the right in the properties

Input “Contact enquiry” → **AI step** “Summarise enquiry” (three bullet points: request, urgency, preferred way to reply) → **Web request** “Report to CRM” (POST to the webhook address of your CRM or of Zapier, Make, n8n) → **Output** “Reported: {{n2}}”.

The address in the screenshot is a placeholder. Enter the webhook address your target system gives you. The target system receives `input` (the original enquiry) and `last` (the summary).

10 Projects

Projects organise work into tasks on a board with three columns: **To do**, **In progress**, **Done**. Tasks can be given to an agent, which writes a first draft. People review and approve.

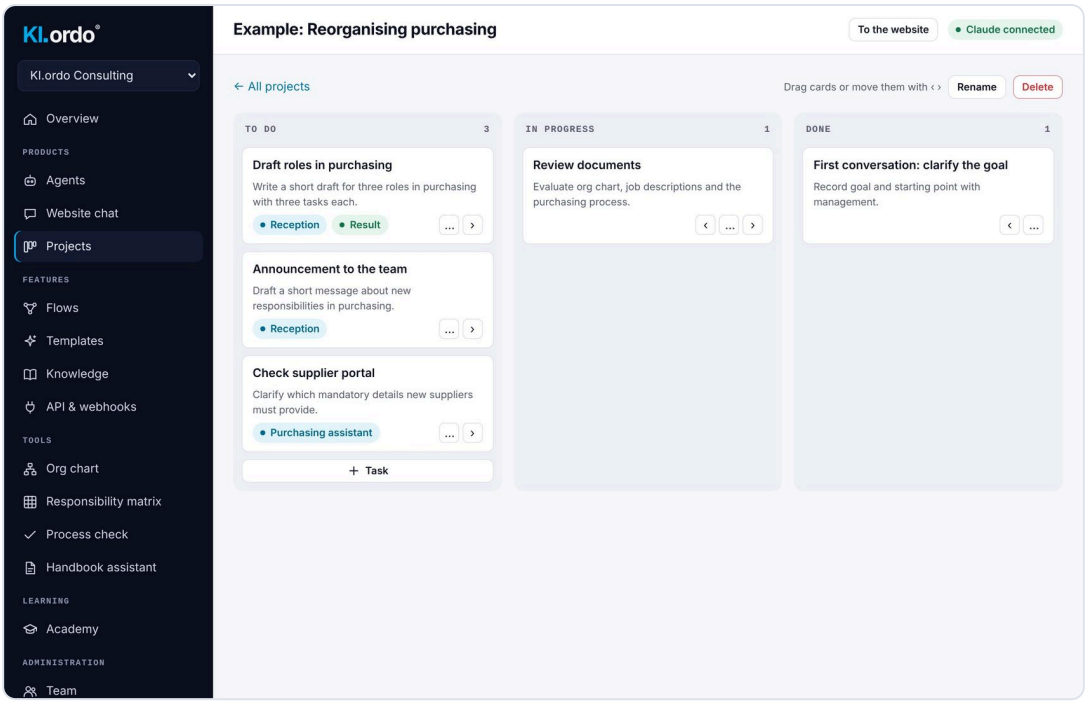


Fig. 26 · Project board with tasks, assigned agents (blue) and available results (green)

Creating a project and tasks

1. Under ‹**Projects**›, click ‹**New project**›, enter a name, ‹**Create**›.
2. In the **To do** column, click ‹**+ Task**›.
3. Enter a **Title** and **Description**. The description is the brief for the agent: make it as specific as possible.
4. Optionally choose an **Assigned agent**, then ‹**Save**›.

Letting the agent work on a task

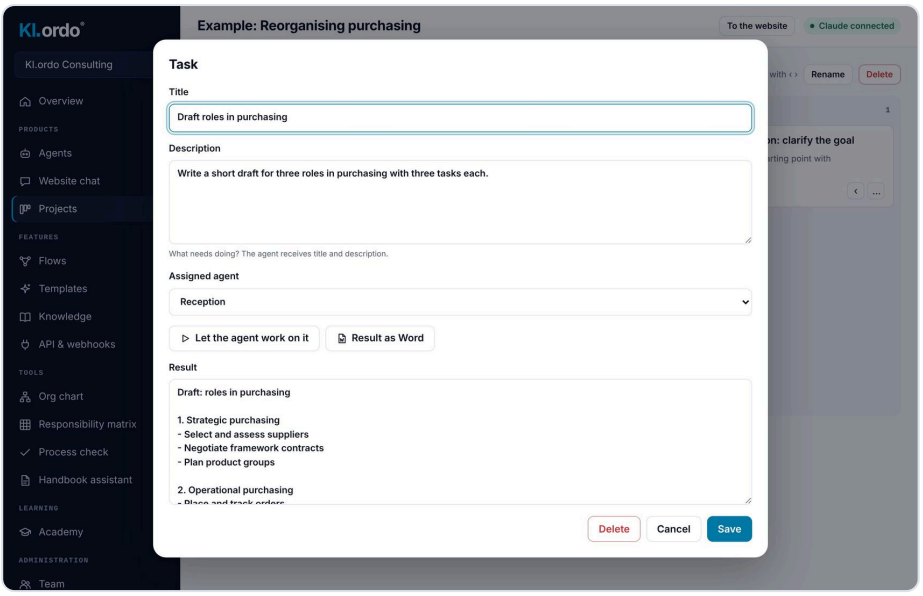


Fig. 27 · Task with agent and result

1. Open the task: double-click the card or use the ‹…› button.
2. ‹**Let the agent work on it**›. The task moves to **In progress** and the agent writes.
3. The draft appears in the **Result** field, and KI.ordo reports “Draft ready. Please check it, then move the card to “Done”.” The task stays in **In progress**; the card shows the green **Result** badge. If there is an error, the message appears in the result and the task goes back to **To do**.
4. Check the result, revise it directly in the field if needed, ‹**Save**›. ‹**Result as Word**› downloads it as a Word file (.docx).
5. **Approve:** Only when a person drags the card to **Done** or moves it there with › does the task count as done and as part of the project’s progress.

Moving, renaming, deleting

- Drag cards with the mouse into another column, or move them with ‹ and ›.
- ‹**Rename**› and ‹**Delete**› are at the top right of the project. Deleting also removes all its tasks.
- The project list shows a progress bar for each project: “x of y tasks done”.

11 Website chat

Any agent can be offered as a chat window on a website. A round button appears at the bottom right; clicking it opens the chat with greeting, starter questions, input field and sources. Visitors can rate answers and ask to hear back from a person.

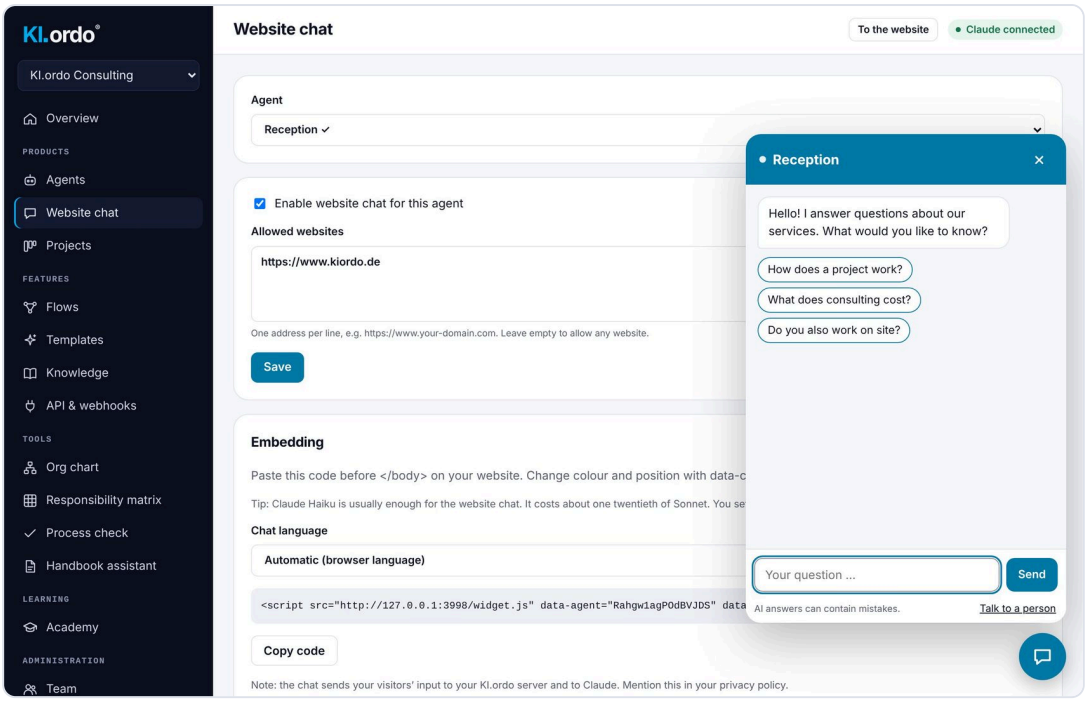


Fig. 28 · The "Website chat" page with the preview and starter questions open at the bottom right

Quick start with the chatbot template

The quickest way is the **Website chatbot with your own knowledge** template (chapter 9). After ‹**Import**›, this page opens with the new agent and the list **Embed the chatbot in four steps**:

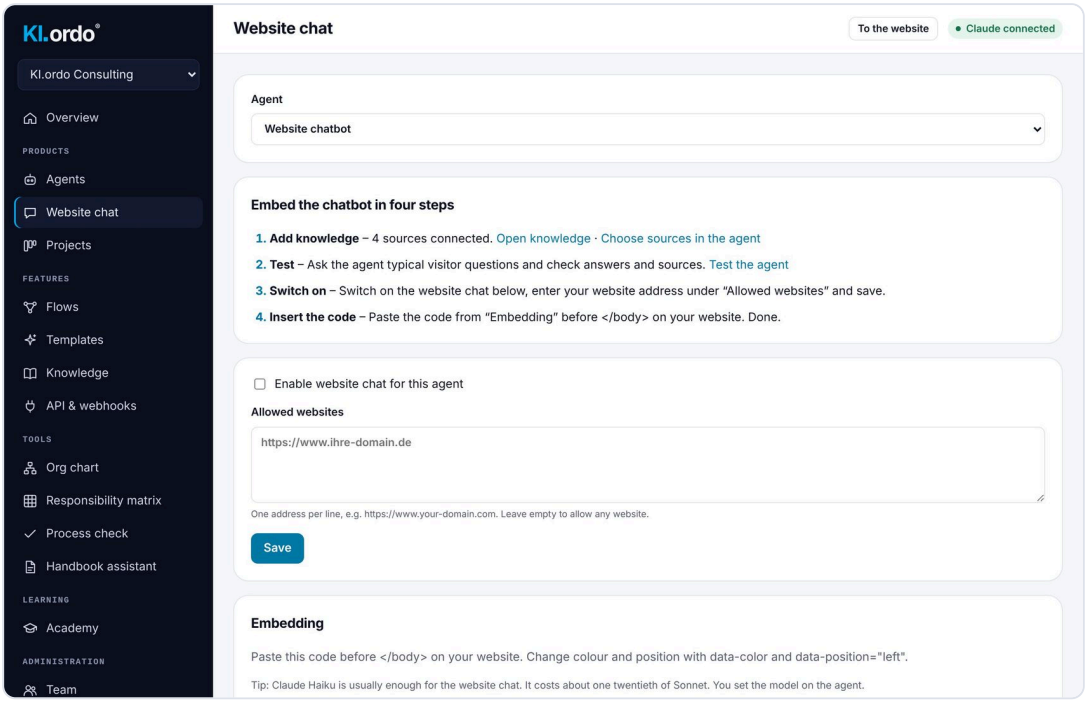


Fig. 29 · The "Website chat" page after importing the chatbot template, with the list "Embed the chatbot in four steps"

1. **Add knowledge:** The list shows how many sources are connected. ‹**Open knowledge**› leads to the knowledge, ‹**Choose sources in the agent**› to the agent.
2. **Test:** In the agent, use ‹**Test the agent**› to ask typical visitor questions, and check the answers and sources.
3. **Switch on:** Further down, enable the website chat, enter your website address under “Allowed websites” and save.
4. **Insert the code:** Paste the code under “Embedding” into your website before `</body>`.

The list only appears directly after you import the template. The next section describes the individual steps.

Setting it up

1. Under ‹**Website chat**›, choose the **agent**.
2. Tick **Enable website chat for this agent**.
3. Under **Allowed websites**, enter the addresses where the chat may appear, one per line, exactly as they appear in the browser: with `https://` and without a slash at the end, e.g. `https://www.your-domain.com`. Leaving it empty allows any website.
4. ‹**Save**›. The preview appears at the bottom right of this page.
5. Under **Embedding**, optionally choose the **Chat language**, then click ‹**Copy code**› and paste the code into your website before `</body>`.

```
<script src="https://YOUR-SERVER/widget.js" data-agent="AGENT-ID"
        data-color="#0079A6" data-position="right" defer></script>
```

ATTRIBUTE	MEANING
`data-agent`	ID of the agent (already included in the copied code)
`data-color`	Colour of the button, header and your messages, freely selectable as a hex value. Without it, `#0079A6` applies. Choose a dark colour so that the white text stays easy to read.
`data-position`	`right` (default) or `left`
`data-lang`	optional: `de`, `en`, `it`, `fr` or `es`

Good to know

- The chat’s controls appear in German, English, Italian, French or Spanish, depending on the visitor’s language setting. With `data-lang="en"` you fix the language. The agent answers in the language of the question.
- The chat can be used with the keyboard; **Escape** closes it.
- You can read conversations from the website chat on the agent (origin **Website chat**).
- Each visitor can send 20 messages per minute; this curbs misuse. The agent knows the last 10 messages of the conversation.
- On the KI.ordo website, the chat is red. That is only an example; you set the colour with `data-color`.
- If KI.ordo runs on your own server (Enterprise plan), that server must be reachable from the internet, otherwise the chat will not appear.

Starter questions, ratings, handovers

- You set **starter questions** on the agent (chapter 6). Clicking one asks the question.
- Below every answer there are 👍 and 👎. The **Ratings** card shows the totals per agent.
- **‹Talk to a person›** at the bottom of the chat opens a short form with name, email and request. The request appears under **Handovers to your team**, together with the conversation (**‹Conversation›**). Reply by clicking the email address. KI.ordo does not send email notifications for new handovers, so check this list regularly.

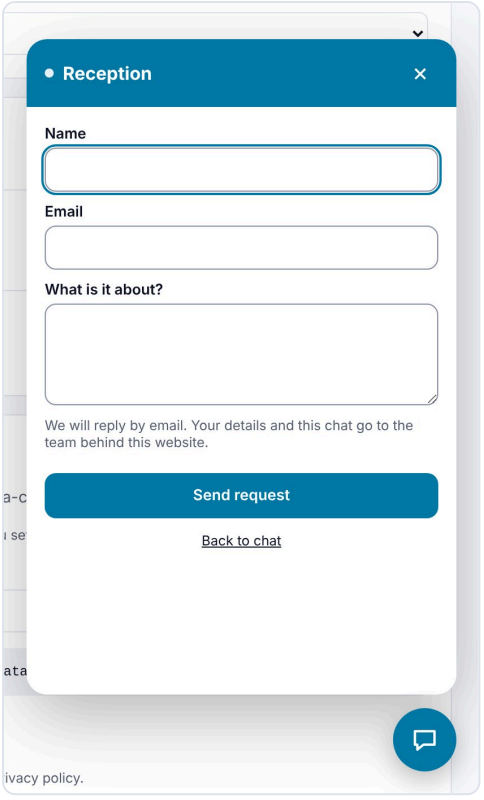


Fig. 30 · "Talk to a person" form in the website chat

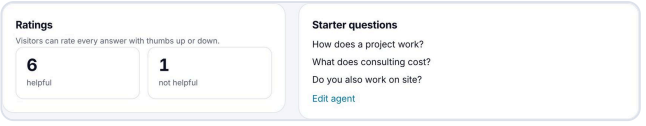


Fig. 31 · Ratings and starter questions of the agent

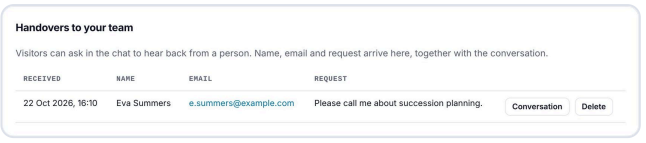


Fig. 32 · Handovers to your team

Data protection: Visitors' input goes to KI.ordo and to Anthropic. The handover form stores name, email and request in your workspace. Mention this in your privacy policy and do not put confidential sources into a public agent.

12 API, webhooks and MCP

Other programs can call agents and flows, such as your CRM, a form or automation services like Zapier, Make or n8n.

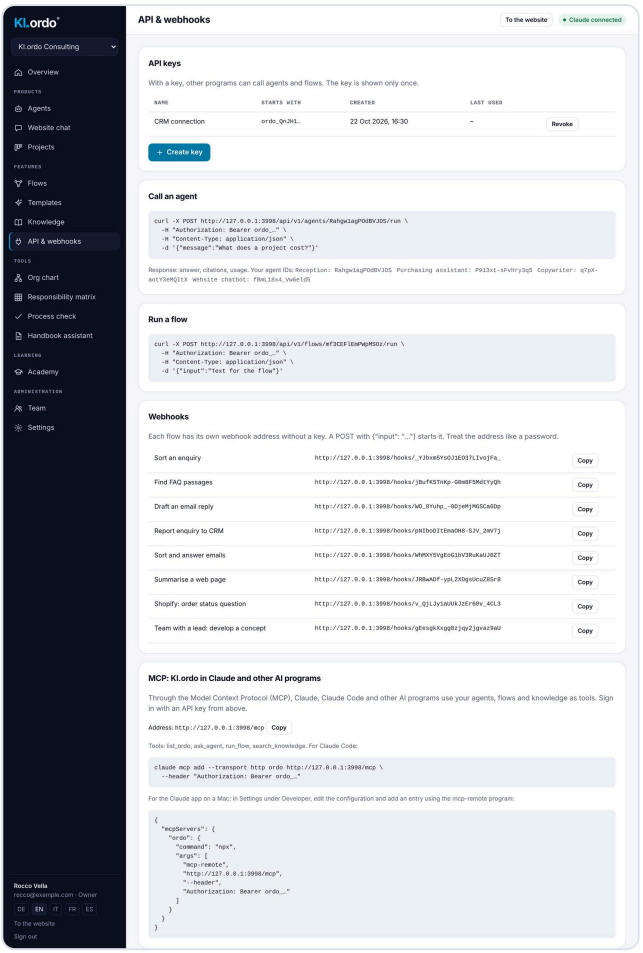


Fig. 33 · The “API & webhooks” page with API keys, sample calls, webhook addresses and MCP

API keys (Admin and Owner only)

1. ‹**Create key**›, enter what it is for (e.g. “CRM connection”), ‹**Create**›.
2. **Copy the key** (it starts with `ordo_`) **straight away**. It is shown only once.
3. From then on, the table only shows the beginning, the creation date and when it was last used. ‹**Revoke**› blocks the key immediately.

Calling an agent

```
curl -X POST https://YOUR-SERVER/api/v1/agents/AGENT-ID/run \
  -H "Authorization: Bearer ordo_…" \
  -H "Content-Type: application/json" \
  -d '{"message":"How much does a project cost?"}'
```

Response: `answer` (text), `citations` (sources), `usage` (tokens). Each call appears as a conversation with the origin `api`.

Calling a flow

```
curl -X POST https://YOUR-SERVER/api/v1/flows/FLOW-ID/run \
  -H "Authorization: Bearer ordo_…" \
  -H "Content-Type: application/json" \
  -d '{"input":"Text for the flow"}'
```

Response: `status` (`ok` , or `fehler` for an error), `output` (result), `runId` .

Webhooks

Every flow has its own address of the form `https://YOUR-SERVER/hooks/…` . A POST to it starts the flow, with no key needed. Send `{"input": "…"}` ; if you send other fields (such as the data of a form), the flow receives the whole JSON as its input text.

> Treat the webhook address as secret as a password. Anyone who knows it can start the flow and so incur costs.

CODE	MEANING
401	Key missing, wrong or revoked
404	Agent, flow or webhook not found (check the ID)
429	More than 60 calls per minute; wait a moment

MCP: KI.ordo in Claude and Claude Code

Through the **Model Context Protocol (MCP)**, Claude, Claude Code and other AI programs can use your agents, flows and knowledge as tools. Sign-in uses an API key (see above). The address is shown on the ‹**API & webhooks**› page in the “MCP” card; it ends in `/mcp` .

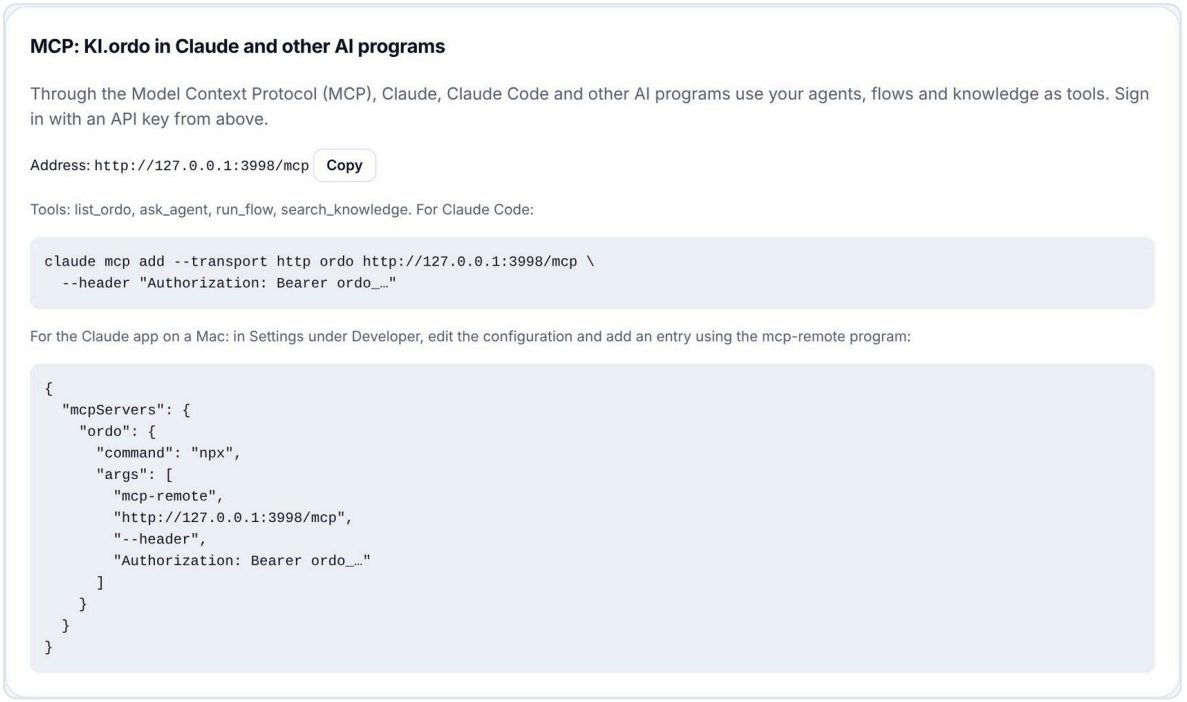


Fig. 34 · The “MCP” card with address, command for Claude Code and entry for the Claude app

TOOL	WHAT IT DOES
`list_ordo`	Lists the workspace's agents and flows with ID, name and description.
`ask_agent`	Asks an agent a question; it answers from its knowledge and cites sources.
`run_flow`	Starts a flow with an input text and returns the result. The run appears under "Recent runs" with the trigger **MCP**.
`search_knowledge`	Searches all knowledge sources and returns the best-matching sections with their source.

Claude Code

Run the command from the card in the terminal, replacing `ordo_…` with your key:

```
claude mcp add --transport http ordo https://YOUR-SERVER/mcp \
  --header "Authorization: Bearer ordo_…"
```

Claude app on a Mac

1. In the Claude app, open **Settings › Developer** and choose **Edit Config**.
2. Paste the entry from the card (the `mcpServers` section with the `mcp-remote` program) and replace `ordo_…` with your key.
3. Restart the Claude app. KI.ordo is then available as a tool.

> An API key gives access to all agents, flows and knowledge in the workspace. Create a separate key for each program so that you can revoke them individually.

13 Shopify

With the Shopify connection, flows can look up orders and products in your Shopify store, for example to answer customer questions about delivery status. KI.ordo only reads; nothing in the store is changed.

Connecting your store (Admin)

1. In Shopify, create a custom app under **Settings › Apps › Develop apps**.
2. Give the app read access to **Orders** and **Products**. For orders older than 60 days it also needs the `read_all_orders` permission.
3. Install the app and copy the **Admin API access token** (it starts with `shpat_`).
4. In KI.ordo, under ‹**Settings**› › Shopify, enter the **Shop address** in the format `your-shop.myshopify.com` and the token.
5. Optionally enter the **Webhook secret** (in Shopify under Settings › Notifications › Webhooks) so that KI.ordo can verify Shopify webhooks. You can usually leave the **API version** as it is.
6. ‹**Save**›, then ‹**Test connection**›. If it works, “Connected:” appears with the name of your store.

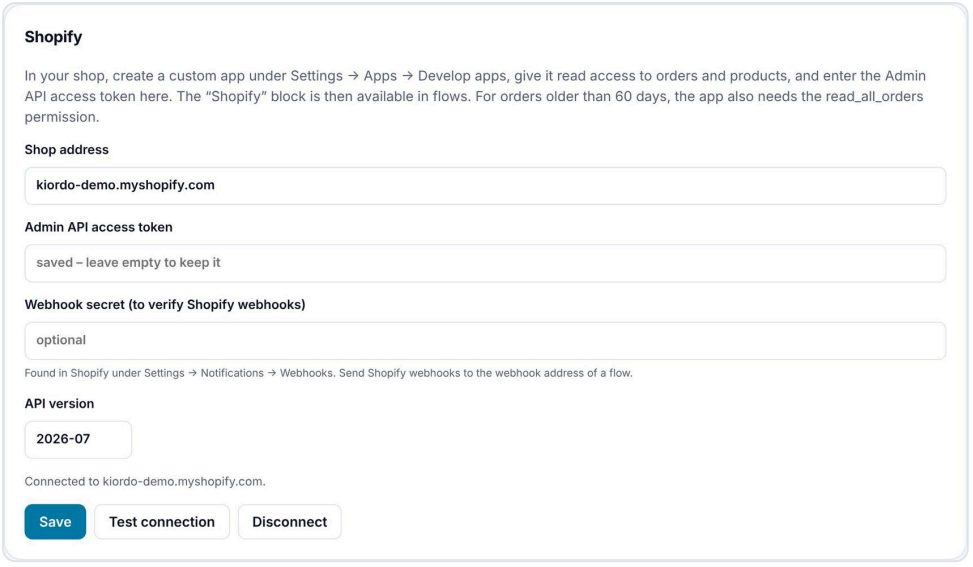


Fig. 35 · The “Shopify” card in the settings, connected to a sample store

KI.ordo no longer displays the token and webhook secret once they are saved. If you leave the fields empty, the saved values are kept. ‹**Disconnect**› deletes the connection.

The “Shopify” building block

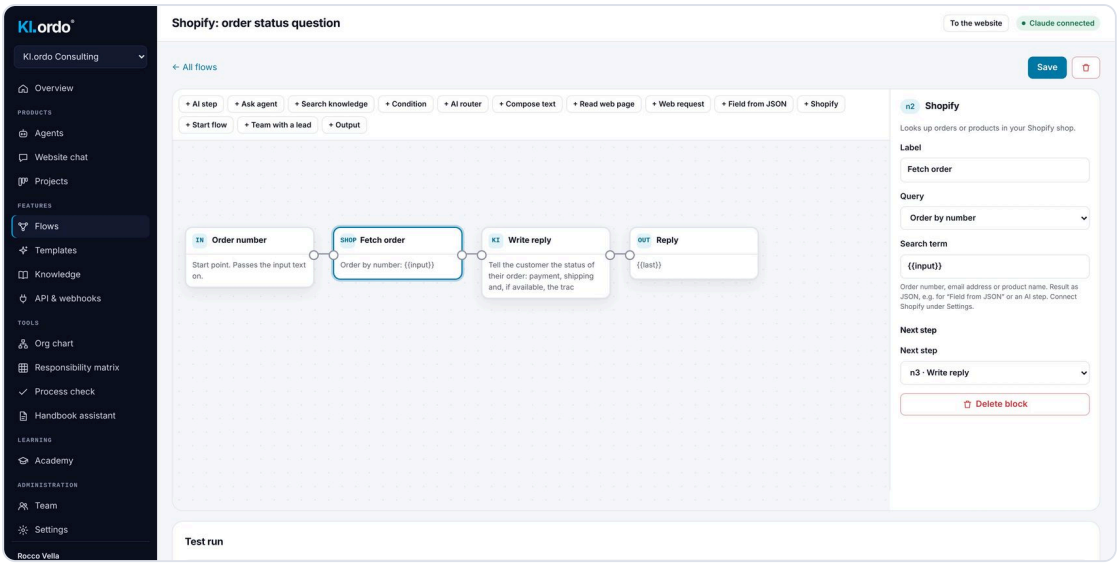


Fig. 36 · Flow from the “Shopify: order status question” template; the block’s settings on the right

QUERY	SEARCH TERM	RESULT (JSON)
Order by number	Order number, with or without #	Order with `bestellung` (order), `datum` (date), `email`, `zahlung` (payment), `versand` (fulfilment), `summe` (total), `artikel` (items) and `sendungen` (shipments: status, tracking number, link, carrier). No match: `"gefunden": false`.
Orders by email	Email address	The last 5 orders for this address, newest first.
Search products	Part of the product name	Up to 5 products with `produkt` (product), `status`, `bestand` (stock), `link` and `preis` (price).
Shop details	–	Name, Shopify address and currency of the store.

The field names in the JSON are fixed and stay in German in every language version; the English meaning is given in brackets.

You usually pass the result on to an **AI step**, which writes a reply from it, or to **Field from JSON** to read out a single value (e.g. `versand`).

The “Shopify: order status question” template

Input “Order number” → **Shopify** “Fetch order” (Order by number, `{{input}}`) → **AI step** “Write reply”: payment, fulfilment and, if available, tracking number with link; if the order is not found, the reply asks for the correct number → **Output**. Import the template under **‹ Templates ›** and test it with a real order number.

If an agent in the website chat should answer order questions, give it this flow under Tools › “Flows it may start” (chapter 6). Make sure visitors only receive details of their own order, for example by having the agent also ask for the order’s email address and compare it.

Shopify webhooks

Shopify can start a flow when something happens, such as a new order. In Shopify, enter the flow’s webhook address under Settings › Notifications › Webhooks (chapter 12). If a webhook secret is saved under Settings › Shopify, KI.ordo checks the signature and rejects calls from anyone else. The flow receives the data from Shopify as JSON; the trigger is called **Shopify**.

14 Org chart.

This tool draws your organisational structure as a tree. You can add boxes below or beside existing ones; KI.ordo arranges everything automatically.

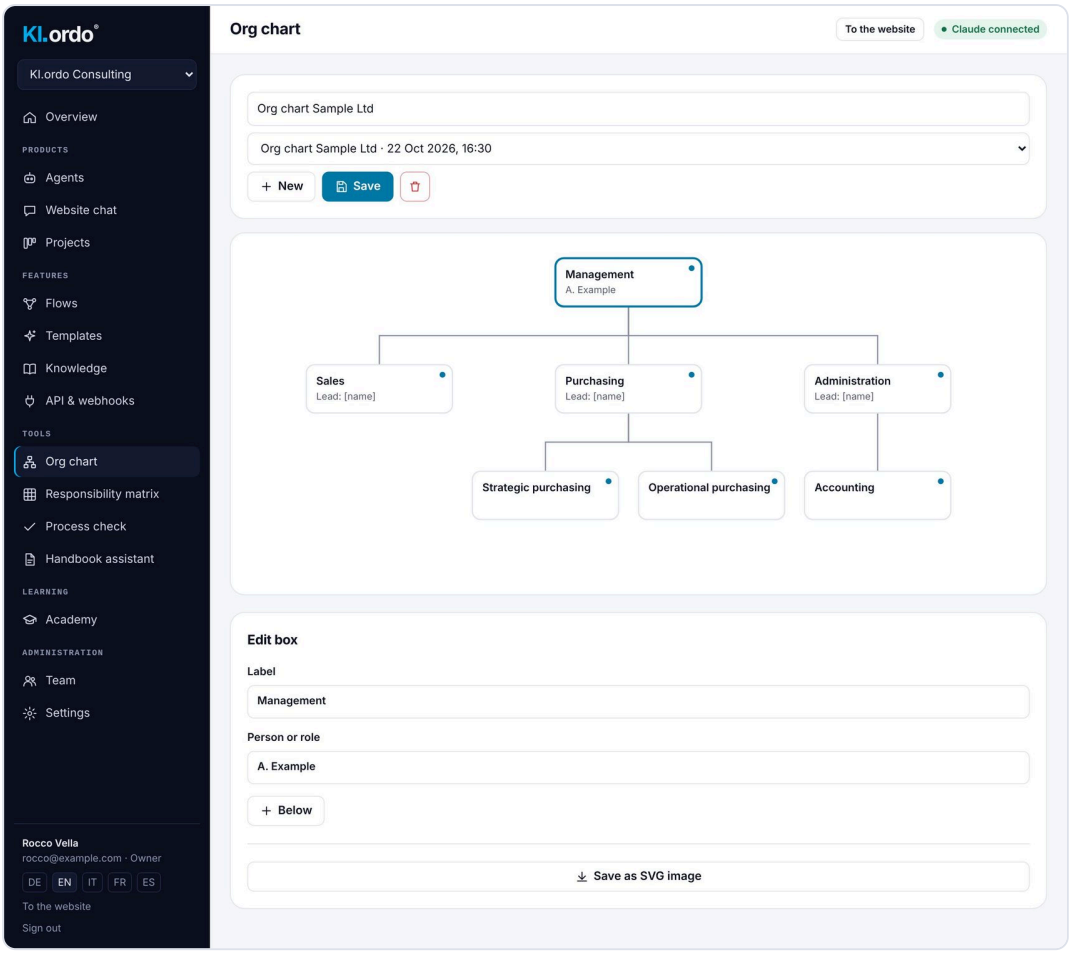


Fig. 37 · Org chart with the editing panel below

1. At the top, choose ‹**New**› or open a saved document from the list; enter the **Title**.
2. Click a box. **Edit box** appears below it, with **Label** and **Person or role**.
3. ‹**Below**› adds a subordinate unit, ‹**Beside**› one at the same level. Use **Reports to** to move a box elsewhere.
4. The bin icon (**Delete box**) deletes a box together with everything below it. KI.ordo asks first, for example *Delete “Purchasing” and 2 boxes below it?* The top box cannot be deleted.
5. ‹**Save**›. ‹**Save as SVG image**› creates a graphic for presentations; SVG files open in Keynote, Pages and the browser.

15 Responsibility matrix.

The responsibility matrix (RACI) clarifies who does what for each task. **R** carries it out, **A** is accountable, **C** is consulted beforehand, **I** is informed.

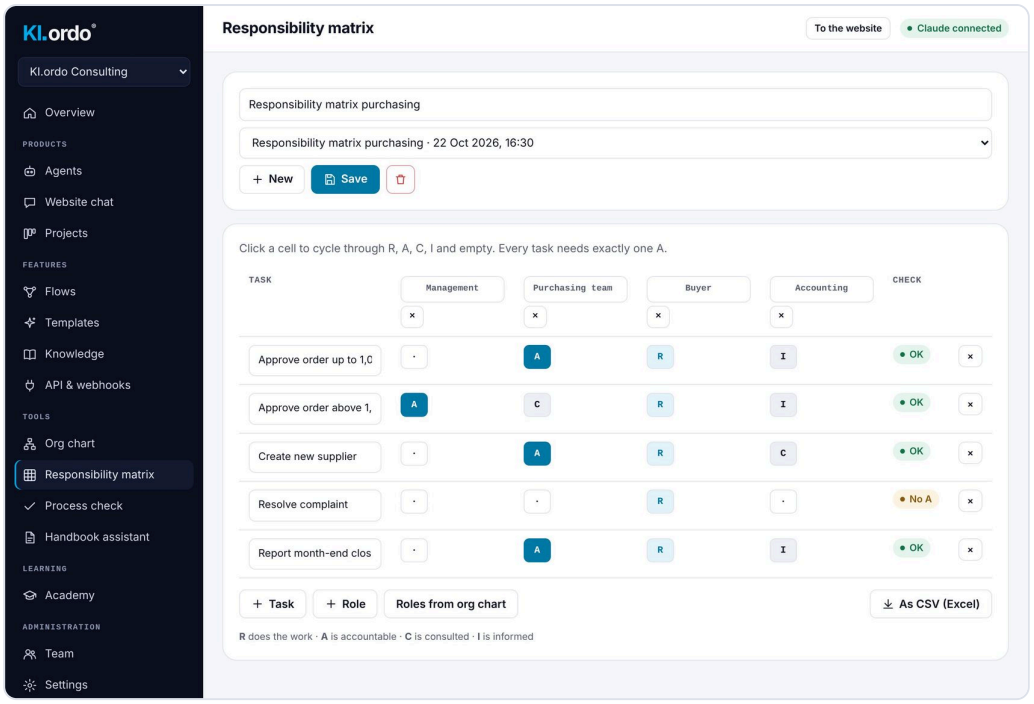


Fig. 38 · Matrix with check column; “No A” shows a gap

1. Create roles as columns (‹**+ Role**›) or take them over with ‹**Roles from org chart**›.
2. Create tasks as rows (‹**+ Task**›) and name them.
3. Click a cell to switch between R, A, C, I and empty.
4. The **Check** column shows “OK” or a gap: every task needs **exactly one A**.
5. ‹**Save**›; ‹**As CSV (Excel)**› opens in Numbers or Excel.

16 Process check

A self-assessment with 12 statements in four areas: Structure & roles, Processes & automation, Knowledge & documentation, Change support. Each statement is rated from 1 (does not apply) to 5 (fully applies).

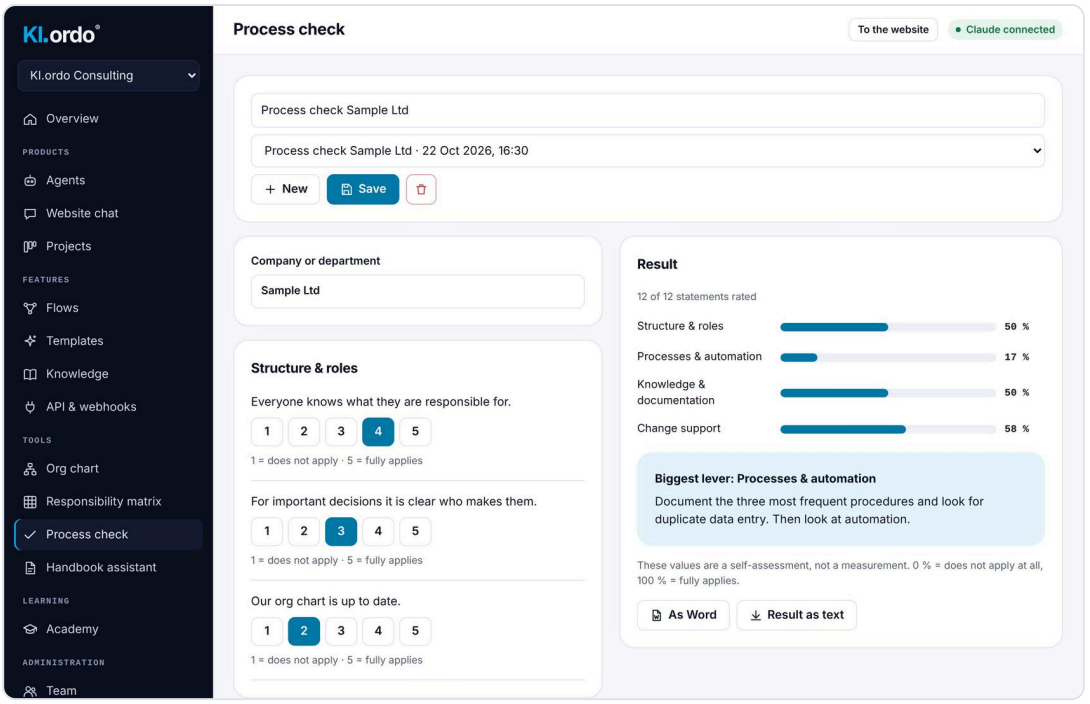


Fig. 39 · Process check: rating on the left, result with the biggest lever on the right

1. Enter the **Company or department**.
2. Rate every statement. The result on the right updates immediately.
3. On the right you see the score for each area as a percentage and the **Biggest lever**, i.e. the weakest area with a recommendation.
4. ‹**Save**›; ‹**As Word**› downloads the result as a Word file, ‹**Result as text**› as a Markdown file.

The scores are a self-assessment, not a measurement. 0 % means “does not apply at all”, 100 % “fully applies”.

17 Handbook assistant

The assistant turns bullet points and your knowledge into a handbook draft in Markdown format, for example for onboarding.

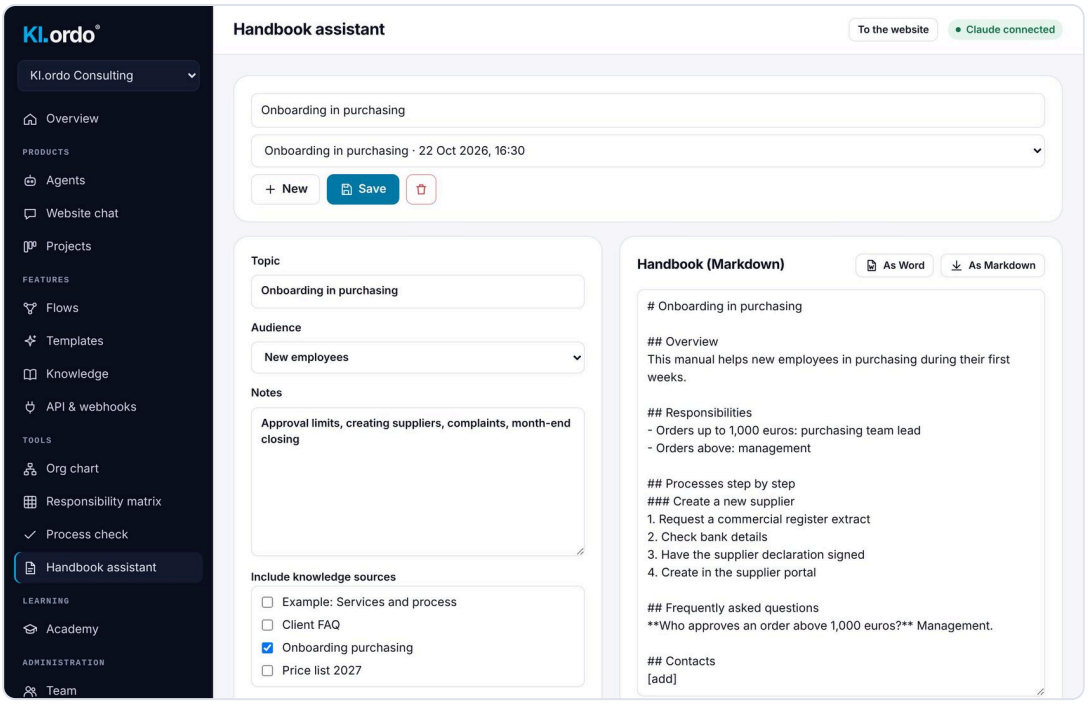


Fig. 40 · Topic, audience, notes and knowledge sources on the left, draft on the right

1. Enter the **Topic**, e.g. “Onboarding in purchasing”, and choose the **Audience**: New employees, The whole team or Managers.
2. Under **Notes**, collect bullet points, processes, contacts and special points.
3. **Include knowledge sources** that fit.
4. ‹**Write draft**›. The draft is structured into overview, responsibilities, step-by-step processes, frequently asked questions and contacts. The AI marks missing details with `[to be added]` instead of inventing them. If there is already text on the right, Kl.ordo asks first: “The current text will be replaced by a new draft. Continue?” This way you do not overwrite your edits by mistake.
5. Check and edit the text on the right, ‹**Save**›. ‹**As Word**› creates a structured Word file with headings and lists, ‹**As Markdown**› the text version.

The Word file opens in Word and Pages. Finished handbooks can be loaded back into Knowledge as a file. Tool documents (org charts, matrices, checks, handbooks) belong to the workspace. Use the selector at the top to switch between saved versions.

18 Academy.

In the **Academy** you learn to use AI safely and effectively and to put KI.ordo to work step by step. Open it in the left-hand bar under **Learning** › ‹**Academy**›. The Academy is open to all roles, including viewers. Your progress is saved for your account, not per workspace.

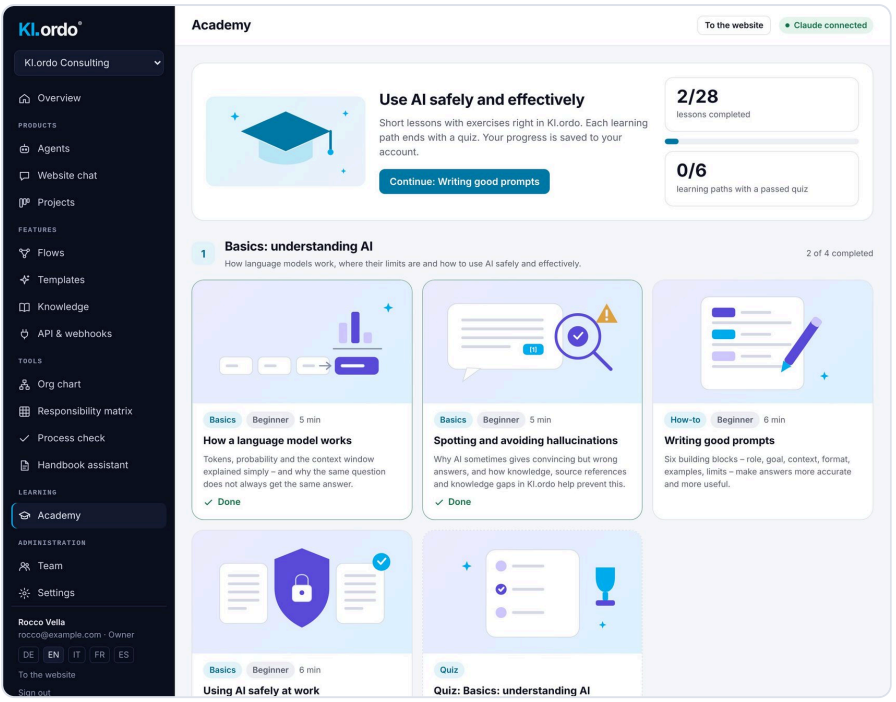


Fig. 41 · Academy: progress at the top, below it the learning paths with lessons and quiz

Structure

The Academy has 6 learning paths with 28 lessons in total. Each lesson takes about 4 to 6 minutes. Every learning path ends with a quiz. Lessons and quizzes appear in the language of the interface.

NO.	LEARNING PATH	CONTENT
1	Basics: understanding AI	How language models work, spotting hallucinations, writing good prompts, using AI safely in your company (4 lessons)
2	Getting started with KI.ordo	Creating your first agent, adding knowledge, importing templates, keeping an eye on costs and usage (4 lessons)
3	Everyday use cases	Meeting minutes, sorting emails, translating, a blog post with a team of three AI roles, website chatbot (5 lessons)
4	Flows and automation	Building flows, AI router, team with a lead, starting flows automatically (4 lessons)
5	Organisation with KI.ordo	Org chart, responsibility matrix, process check, handbook assistant, projects (5 lessons)
6	More use cases	Social media, enquiries and leads, fact-checking, summarising, job adverts, customer service (6 lessons)

Each lesson card shows the type (**Basics**, **How-to** or **Use case**), the level (**Beginner** or **Advanced**) and the duration. Completed lessons have a tick. At the top of the page you see “lessons completed” and “learning paths with a passed quiz”; the **Continue** button takes you to the next open lesson.

Working through a lesson

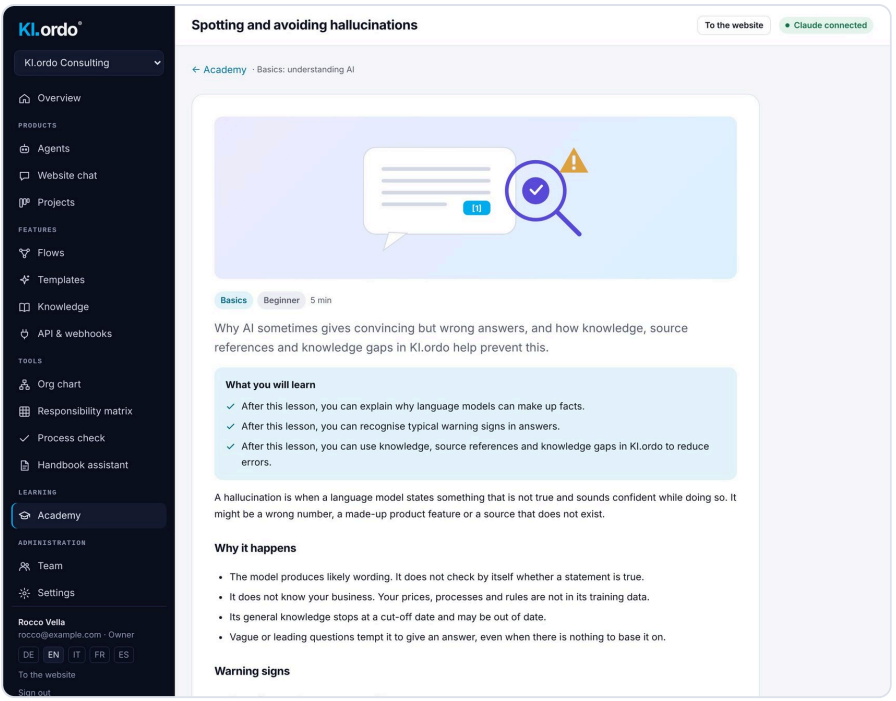


Fig. 42 · Lesson with learning goals, explanation, the “Try it now” exercise and the buttons at the end

1. Click a lesson card. At the top you see an illustration, a summary and **What you will learn** with the learning goals.
2. Read the text. Boxes marked **Tip**, **Caution** and **Example** highlight important points.
3. In the **Try it now** box you practise directly in KI.ordo: the button opens the matching page or imports a template into your workspace. The browser’s back button takes you back to the lesson. Importing templates requires the Editor role or higher.
4. At the bottom, click ‹**Mark as done**›, or go straight to the next lesson with ‹**Done, next lesson**›. After the last lesson of a learning path, the button reads ‹**Done, go to the quiz**›. Clicking ‹**Done**› again removes the mark.

Quiz

Each quiz has 4 questions. Choose one answer per question and click ‹**Check answers**›. You then see the correct answer with an explanation for each question. You pass the learning path with 3 out of 4 correct answers. ‹**Try again**› repeats the quiz; your best result counts.

Team progress (Admin and Owner)

Admins and owners see the **Team progress** card at the bottom of the Academy page: for each person in the workspace, the lessons completed, the learning paths passed and when they last studied. Individual quiz answers are not visible.

> **Tip for onboarding:** New people start with learning paths 1 and 2. Anyone who builds flows then does learning path 4.

19 Team and roles

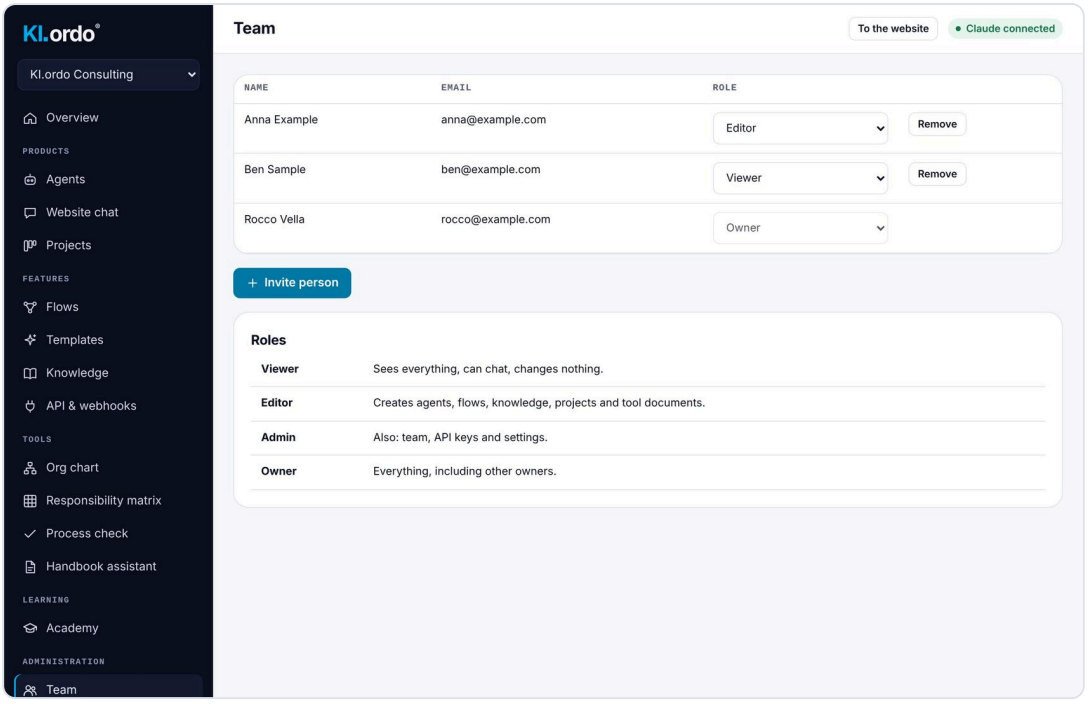


Fig. 43 · Team with roles and explanation

Inviting a person (Admin and Owner)

1. ‹**Invite person**›, enter **Name**, **Email** and **Role**, ‹**Invite**›.
2. If the person does not have an account yet, KI.ordo shows the address, email and a **temporary password**. Pass these details on in person; KI.ordo does not send an invitation email.
3. The person signs in and changes the password under ‹**Settings**›.

If the person already has an account (for example from another workspace), they are simply added and see the new workspace in their selector.

What each role can do

ACTION	VIEWER	EDITOR	ADMIN	OWNER
View everything, chat with agents, search knowledge, learn in the Academy	yes	yes	yes	yes
Create, change and delete agents, knowledge, flows, projects and tool documents	no	yes	yes	yes
Test flows, let the agent work on tasks, write handbook drafts	no	yes	yes	yes
Manage the team, API keys, workspace name, prices and token limit, Shopify, own brand, manage subscription, view invoices, export and import, change log, team progress (Academy)	no	no	yes	yes

Appoint or change owners; cancel a subscription paid by invoice	no	no	no	**yes**

- You change roles directly in the table; you cannot change your own role.
- ‹**Remove**› takes a person out of the workspace; their account remains.
- Every workspace needs at least one owner. The last one can neither be removed nor downgraded.

> **Forgotten password:** There is no reset by email in the app. Write to **kontakt@kiordo.de** and a new password will be set for you. If sign-in with a company account is set up, you can also use that (chapter 2). Keep passwords in the Passwords app on your Mac.

20 Settings

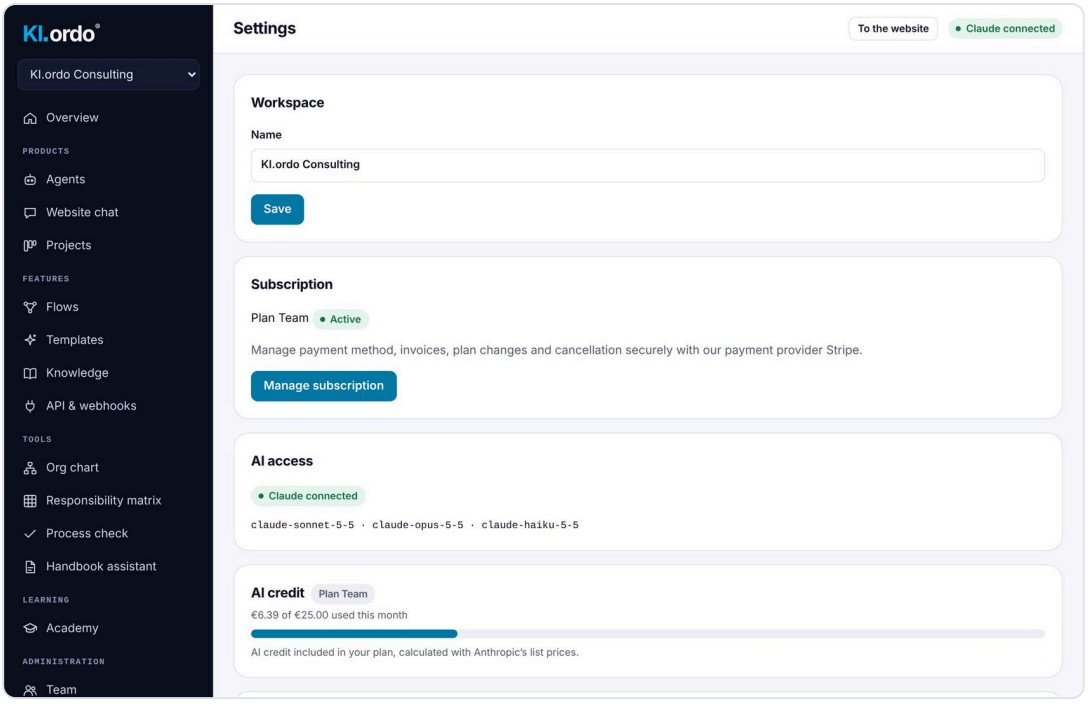


Fig. 44 · Settings, upper part

SECTION	CONTENT
Workspace	Change the name (Admin).
Subscription	Plan, status and ‹**Manage subscription**›; for orders on invoice, also invoices and cancellation (chapter 21). In the demo access, this is replaced by the “Demo access” card with the deletion date and ‹**Book now**›.
AI access	Shows ‹**Claude connected**› or ‹**AI not connected**› (in the demo access ‹**Sample answers**›) and the enabled models. The provider sets up access; you do not need to do anything.
AI credit	Your plan’s credit and usage this month (chapter 21).
Prices for cost estimates	Euros per 1 million tokens for input and output, per model. The overview uses these to calculate the estimated costs. KI.ordo calculates the AI credit separately, using Anthropic’s list prices.
Monthly token limit	Upper limit for input and output tokens per calendar month (Admin). Once it is reached, the AI in this workspace stops answering until the end of the month; chats, flows and the API report “This workspace has reached its monthly token limit.” 0 or empty = no limit. Sample answers do not count.
Own brand (white label)	Your own name, colour and logo instead of “KI.ordo” (Admin, Enterprise plan only), see below.
Shopify	Connection to your Shopify store (Admin), chapter 13.
Back up and move	Export and import of the workspace (Admin), see below.
Change log	Who created, changed or deleted what and when (Admin). The last 300 entries.
Appearance	Automatic, Light or Dark.

Change password	Current and new password (at least 10 characters).

Setting a token limit



Fig. 45 · Token limit with usage in the current month

As a guide: a chat with knowledge uses roughly 2,000 to 4,000 tokens per question. 2 million tokens are therefore enough for about 500 to 1,000 questions a month. The overview shows the actual usage. The token limit applies in addition to your plan's AI credit; the AI pauses as soon as either limit is reached.

Back up and move

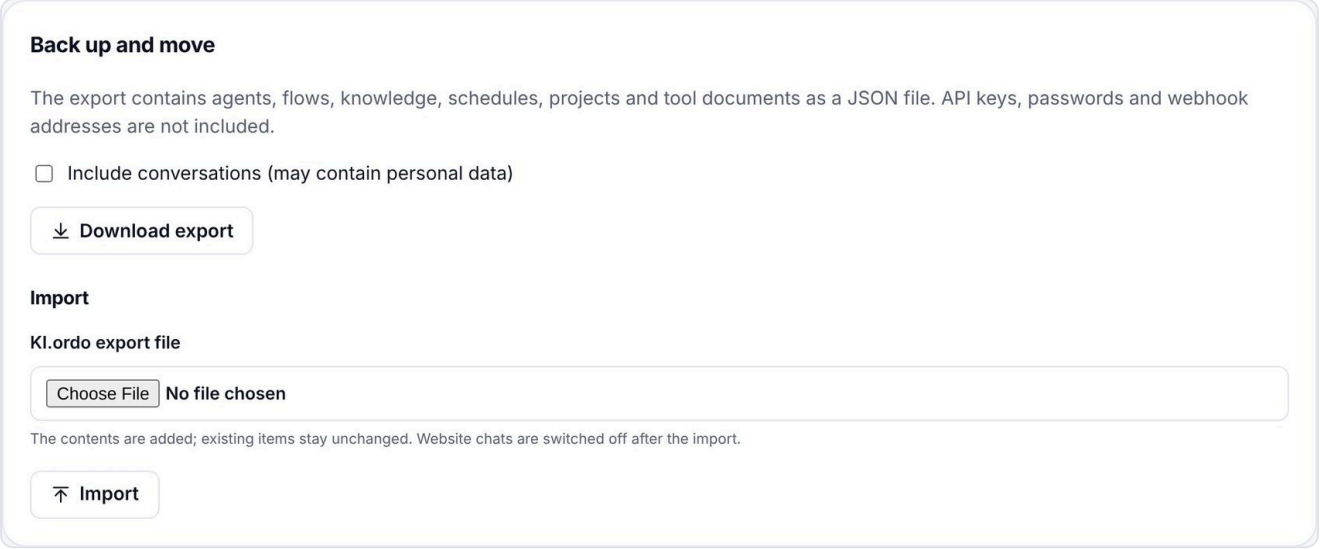


Fig. 46 · Export and import

- ‹**Download export**› saves agents, flows, knowledge (with full text), schedules, projects and tool documents as a JSON file. Tick the box to include conversations; they may contain personal data.
- API keys, passwords, webhook addresses and the team are not included.
- **Import:** choose the export file, ‹**Import**›, confirm. Everything is added; existing items stay. References (agent in a flow, knowledge on an agent, sub-flows, tools) are switched to the new IDs. Website chats are switched off afterwards, and webhooks get new addresses.
- This is how you transfer content to another workspace or another KI.ordo installation, or create a template for clients.

Own brand (white label)

On the **Enterprise** plan, you can replace "KI.ordo" in the app and in the website chat of this workspace with your own brand. On other plans the card is locked and shows "Own branding is available in the Enterprise

plan."

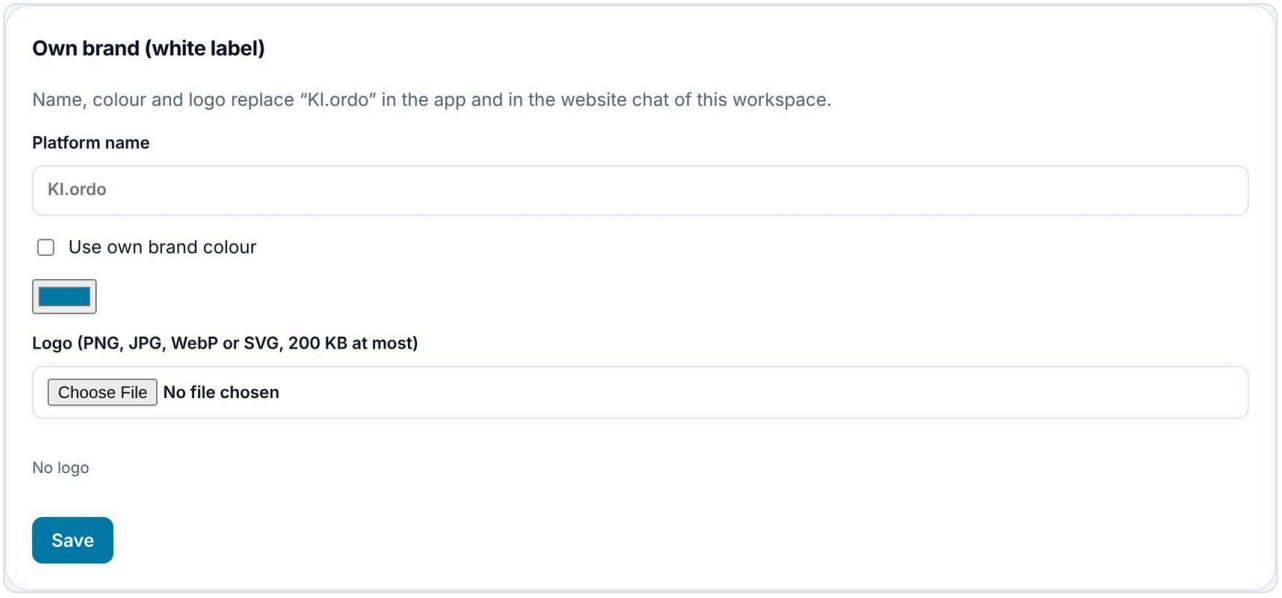


Fig. 47 · Own brand with name, colour and logo

1. Enter the **Platform name** (up to 40 characters). Without a logo, it appears at the top left and on the sign-in page.
2. Optionally tick **Use own brand colour** and choose the colour. It colours buttons and links; KI.ordo adjusts it in light and dark mode so that text stays readable.
3. Optionally choose a **Logo**: PNG, JPG, WebP or SVG, 200 KB at most. A preview appears below; ‹**Remove logo**› takes it out again.
4. ‹**Save**›. The page reloads and shows the new brand.

Change log

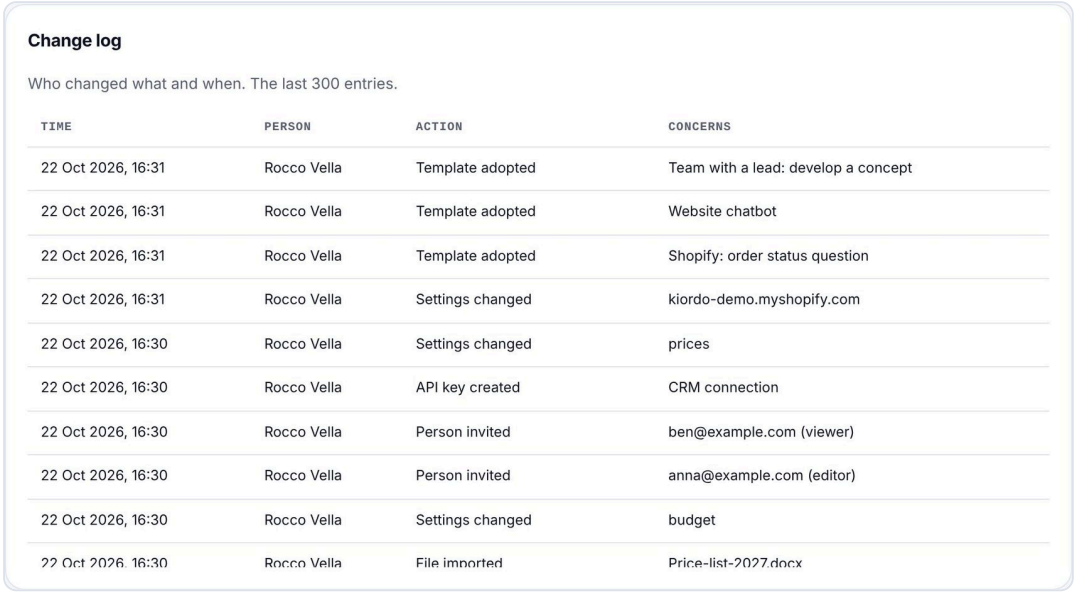


Fig. 48 · Change log with time, person, action and affected content

21 Subscription and AI credit

Plans

PLAN	PRICE PER MONTH	AI CREDIT PER MONTH
Start	€45	€10
Team	€105	€25
Business	€445	€100
Enterprise	€1,400	€300

What else each plan includes is shown on the pricing page (Fig. 1). The details there and in your order are binding.

Managing your subscription

Under ‹**Settings**›, the **Subscription** card shows your plan and its status.

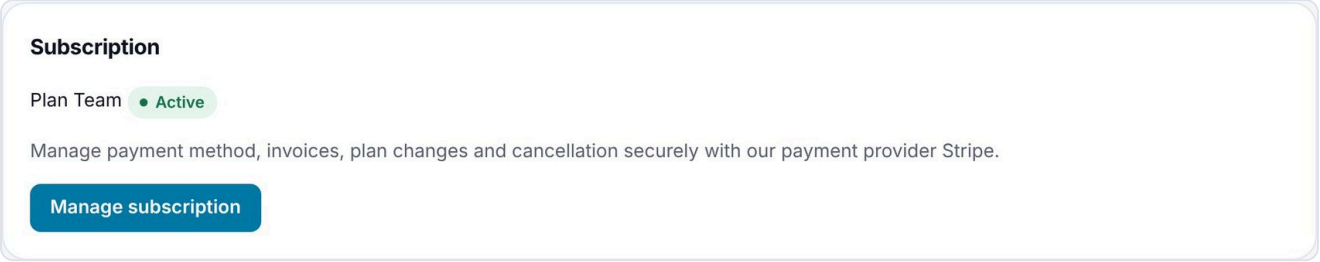


Fig. 49 · The “Subscription” card: Team plan, status Active

STATUS	MEANING
Active	The subscription is running.
Payment due	The last payment has not yet been received, or an invoice is due. The AI keeps running. Check your payment method or transfer the invoice amount; the bank details are on the invoice.
Awaiting payment	Orders on invoice only: the AI will be activated once the first invoice has been paid. You can already use all other features.
Overdue – AI locked	Orders on invoice only: an invoice is overdue. The AI is locked until payment has been received; your content is kept.
Ended	The subscription has been cancelled or has expired. AI is locked in this workspace; your content is kept.

Subscription with Stripe

1. Click ‹**Manage subscription**› (Admin and Owner only; other roles see a note).
2. Stripe’s **customer portal** opens. There you can change the payment method, download invoices, switch plans or cancel.
3. The back link in the customer portal returns you to the settings. A plan change or cancellation appears there automatically as soon as Stripe reports it.

After every payment, KI.ordo sends the invoice as a PDF to the email address used for your order, in the language of the order. You can also find all invoices in the customer portal.

Subscription on invoice

If you ordered on invoice (chapter 2), the **Subscription** card says “Payment by invoice”. There is no customer portal in this case; you will find everything you need directly in the card.



Fig. 50 · The “Subscription” card for payment by invoice, with the list of invoices and “Cancel subscription”

- **Next invoice:** The card shows the date of the next invoice. Billing is monthly; each invoice arrives as a PDF by email, with a QR code (GiroCode) for paying by bank transfer in your banking app.
- **Invoices:** The table lists all invoices with number, date, period, amount and status (**Unpaid**, **Paid**, **Cancelled** or **Cancellation invoice**). ‹**PDF**› opens the invoice. Admins and owners see the list; other roles see a note.
- **Cancelling:** ‹**Cancel subscription**› (Owner only) cancels, after you confirm, as of the date of the next invoice. Until then you can use everything as usual; the card shows “Cancelled as of …”. After that, no more invoices are issued and the AI is locked; your content is kept. Until that date, ‹**Withdraw cancellation**› reverses the cancellation.
- The provider records your payment. The invoice then changes to **Paid** and, if necessary, so does the status of the subscription.

AI credit

Every plan includes a monthly **AI credit** in euros. KI.ordo converts all AI usage into euros at Anthropic’s list prices and deducts it from the credit. The **AI credit** card in the overview and under Settings shows “… of … used this month” and a bar: orange from 80 %, red at 100 %.



Fig. 51 · AI credit under Settings

- **Once the credit is used up**, the AI pauses until the end of the month: chats, website chat, flows, projects and the API report “This month’s AI credit is used up.” Blocks without AI keep running.
- The full credit is available again at the start of each calendar month. Unused credit does not carry over.
- You can get more credit with a larger plan (Manage subscription; for orders on invoice, via kontakt@kiordo.de) or on request from the provider.

- Sample answers do not count. You can also set the **token limit** under Settings (chapter 20) to cap usage further.

> **Working economically:** Choose a smaller model for simple tasks, give public agents only the tools they need, and do not run scheduled flows more often than necessary. The overview shows which model uses how much.

PART C

Workflows.

How the features work together day to day: four proven routes from idea to result.

22 From knowledge to website chat.

Goal: visitors to your website get reliable answers about your services around the clock. Time needed: about an hour. Shortcut: create the knowledge first, then import the “Website chatbot with your own knowledge” template; it comes with ready-made instructions and guides you to the embedding in four steps (chapter 11). The Academy explains the same route in the lesson “Setting up a website chatbot with your own knowledge”.

1. **Gather knowledge** (chapter 5): create services, process, frequently asked questions and data protection as separate sources. Check five typical customer questions with **Test search**.
2. **Set up the agent** (chapter 6): write instructions with role, limits and next step, set creativity to 0.2 to 0.3, assign the sources.
3. **Test:** ask 10 to 15 real questions in the chat, including awkward ones (“What exactly does it cost?”, “Are you better than …?”). Check answers and sources, then sharpen instructions and knowledge.
4. Write and save the **greeting**.
5. **Enable the website chat** (chapter 11), enter the allowed website and add the code to your website.
6. Update your **privacy policy**.
7. Enter **starter questions** for the three most common requests.
8. **Review:** in the first week, read the conversations with the origin “Website chat”, the **Knowledge gaps** and the 👎 ratings every day, and add to the knowledge.

23 A consulting project with KI.ordo.

Goal: reorganise one area of a client’s business, such as purchasing. A separate workspace for each client is recommended.

1. Create a **workspace** for the client (selector at the top left, ‹ **+ New workspace** ›) and invite those involved as viewers. How many workspaces your plan includes is shown on the pricing page.
2. Complete the **process check** with management (chapter 16). The biggest lever sets the focus.
3. Add the client’s **documents** as knowledge: job descriptions, processes, rules.
4. Draw and save an **org chart** of the current state, then use ‹ **New** › to create a second one for the target state (chapter 14).
5. Create a **responsibility matrix** with roles from the org chart and resolve gaps (“No A”) (chapter 15).
6. Create a **project** with tasks; an agent writes drafts of role descriptions and messages to the team (chapter 10).
7. Draft a **handbook** for the new processes with the handbook assistant (chapter 17).
8. Optionally set up an **internal agent** with the new handbook as its knowledge to answer employees’ questions.

24 Adding a new person

1. Invite them under ‹**Team**› and choose the right role: Viewer for reading and chatting, Editor for contributing.
2. Hand over the sign-in details in person.
3. The person signs in and changes their password under Settings. They choose the language at the bottom of the left-hand bar and the appearance under Settings › Appearance.
4. For getting started: in the **Academy**, the learning paths “Basics: understanding AI” and “Getting started with KI.ordo” (chapter 18), plus this handbook, Part B, chapters 5 to 7. Admins can follow progress under “Team progress”.

25 Regular upkeep

WHEN	WHAT
Weekly	Check knowledge gaps, handovers and ratings in the website chat; add questions without a good answer to the knowledge. Check the recent runs of scheduled flows for errors.
Monthly	Check the overview: AI credit, tokens, costs per model. If costs for simple tasks rise, choose a smaller model. Keep prices and token limit up to date under Settings. Download an export and store it separately. File invoices from the email, the customer portal or under Settings › Subscription; for orders on invoice, pay open invoices.
When things change	Update new prices, services or rules in the knowledge straight away (add the new version, delete the old one, reassign agents).
Quarterly	Review the team: who still needs access? Revoke unused API keys. Test flows. Look through the change log for anything unexpected. Check the team progress in the Academy.

26 Troubleshooting

PROBLEM	SOLUTION
“AI not connected” is shown at the top, and “AI temporarily not connected” on the overview	The AI cannot be reached at the moment and returns sample answers. Your content is kept. If the message persists, write to kontakt@kiordo.de.
“Not available in the demo. …”	The feature is locked in the demo access (chapter 2). It is available with a booked plan.
Start demo: “Several demos have already been started from your internet connection today. …”	The daily limit has been reached. Try again the next day or write to kontakt@kiordo.de.
“The AI did not respond: …”	The message gives the reason. If it is none of the messages below, wait a moment and try again; if the error persists, send the exact wording to kontakt@kiordo.de.
“This month’s AI credit is used up.”	Your plan’s credit has been used. The AI will answer again from next month. For more credit, choose a larger plan (Manage subscription) or contact the provider.
“The subscription for this workspace has ended. …”	The subscription was cancelled or not paid. Your content is kept. Book a plan on the website or write to kontakt@kiordo.de.
Subscription shows “Payment due”	Under Settings › Subscription, click ‹**Manage subscription**› and check the payment method; for orders on invoice, transfer the amount due. The AI keeps running in the meantime.
“The AI will be activated once the first invoice has been paid.”	Order on invoice: the first invoice has not yet been recorded as paid. The AI starts once payment has been received.
“An invoice is overdue. The AI is locked until it is paid.”	View the open invoice under Settings › Subscription and pay it by bank transfer. The AI runs again once payment has been received.
“This confirmation link has expired or has already been used.”	Order on invoice: the link is valid for 48 hours and can be used only once. Order again if necessary; if you have already confirmed, sign in with the email address from the order.
“An account already exists for this email address. …”	After an order: sign in with this account. The order is then added as a new workspace. For an order on invoice, sign in to the app first and then order again.
“There is no completed payment for this order.”	The payment was not completed or the link is incomplete. Use the link from the order confirmation or write to kontakt@kiordo.de.
“A workspace has already been created for this order. …”	The order has already been redeemed. Sign in and choose the workspace at the top left.
“Registration is closed. …”	An account is created by booking a plan on the website or through an invitation (chapter 19).
Signing in with a company account: “There is no account for this email address yet. …”	An admin invites you under Team with exactly this email address; after that, signing in with the company account works.
Agent makes things up or cites no source	Is a suitable knowledge source assigned? Use **Test search** to check whether the passage is found. Lower the creativity and add “Answer only on the basis of the knowledge” to the instructions.

Agent's answers are too long	Set a length in the instructions, e.g. "five sentences at most".
Condition takes the wrong branch	It only checks the result of the **previous** step. Check in the log what text was there; use the word stem rather than the whole word.
Web request: "Only https addresses are allowed." / "Internal addresses are blocked."	Use an address starting with `https://`. Devices on your own network cannot be reached, for security reasons.
Flow ends without a result	An output is not connected. Check the connections or add an Output block.
Website chat does not appear	Is the chat enabled on the agent? Is the address under "Allowed websites" exact, with https and without a slash at the end? With your own server: is it reachable from the internet?
"Too many requests. Please wait a moment."	The per-minute limit has been reached (chapter 28). Wait a minute.
Buttons are greyed out	Your role does not allow this action (chapter 19).
"Hardly any text was found in the file."	Usually a scanned PDF without text recognition. Save it with text recognition in Preview or Acrobat, or paste in the text.
File is not accepted	Larger than 20 MB, an old Word file (.doc) or another format. Save as .docx, PDF or text.
"Address not found." / "Page not reachable."	Check the spelling of the address. Some websites block automatic retrieval; in that case, copy and paste the text of the page.
"This workspace has reached its monthly token limit."	Raise the limit under Settings or wait until the start of the month.
Schedule did not trigger	Is "Run on a schedule" ticked and saved? Errors are listed under "Recent runs". If the server was under maintenance at the scheduled time, that one run is skipped.
Team with a lead: "Please add at least one team member (role or agent)."	Under **Roles in the team**, enter at least one line "Name: task" or tick an agent.
AI router often chooses "other"	Name the categories more clearly and give examples in the **Hint for the AI**, e.g. "Invoice questions count as Question".
"The text is not valid JSON."	Field from JSON is not receiving JSON text. Check the previous step in the log; for an AI step, add "Answer only with JSON" to the prompt.
"Shopify is not connected. …"	Under Settings › Shopify, enter the shop address and access token, then ‹**Test connection**›.
Shopify: order not found	Result `"gefunden": false`: check the number. If the order is older than 60 days, the app in your store also needs the `read_all_orders` permission.
"Invalid Shopify signature."	The webhook secret under Settings › Shopify does not match the one in Shopify. Enter it again and save.
Website shows old content	Reload with ⌘⇧R.

For any other questions, contact us at **kontakt@kiordo.de**.

27 Accessibility

KI.ordo is designed and tested to WCAG 2.1, level AA (automatically with axe-core and by hand with the keyboard, at 200 % zoom and at a width of 320 pixels). The accessibility statement is on the website under **Accessibility** in the footer of every page.

AREA	HOW IT WORKS
Keyboard	Everything can be operated with Tab, Shift + Tab, Enter, Space and Escape. The focus is clearly outlined.
Skip to content	The first Tab stop on every page; skips the navigation.
Screen readers (e.g. VoiceOver)	Headings, regions, labels and status messages are marked up. Answers in the chat are read out once they are complete. The usage chart is also available as a table.
Flow editor	Reach blocks with Tab, move them with the arrow keys and choose connections via **Next step**. You choose the time in the schedule with two drop-down lists.
Tabs (e.g. adding knowledge)	Switch with the left and right arrow keys; Tab jumps into the content.
Project board	Move cards with the ‹ and › buttons instead of dragging.
Academy	Progress bars also announce their value to screen readers. Quiz questions are groups of radio buttons; after “Check answers”, the result is announced.
Appearance	Light, Dark or Automatic; contrast at least 4.5 : 1. With “Reduce motion” (System Settings › Accessibility › Display), animations are switched off.
Zoom	Up to 200 % with ⌘ + without loss of content; also usable on a smartphone.

Known limitation: the connecting lines in the flow editor are a graphic; for screen readers, the **Next step** list in the properties applies.

28 Values and limits

ITEM	LIMIT
Password	at least 10 characters
Sign-in validity	14 days
File for knowledge	PDF, DOCX, TXT, MD, CSV, JSON, HTML; up to 20 MB
Web page / sitemap	one page, or up to 50 pages per sitemap
Section size in knowledge	about 900 characters, 150 characters overlap
Knowledge sections per agent answer	up to 4
Conversation history an agent knows	last 20 messages (website chat: 10)
Agent instructions	up to 20,000 characters
Message in the chat / website chat	up to 8,000 / 2,000 characters
Steps per flow run	40 at most
Categories of an AI router	up to 8, plus “other”
Nested flows (Start flow)	3 levels at most
Schedule	hourly to weekly, checked every 30 seconds
Runs listed per flow	last 30
Starter questions per agent	up to 4, 120 characters each
Tool rounds per answer	up to 6
Handover form in the website chat	5 requests per minute per visitor
Blocks / connections per flow	up to 60 / 120
Web request	https only, 10 seconds, response up to 20,000 characters
Website chat per visitor	20 messages per minute
API and webhooks	60 calls per minute
MCP	120 calls per minute
Sign-in attempts	20 per minute
AI credit per month	Start €10, Team €25, Business €100, Enterprise €300
Shopify: Orders by email / Search products	the last 5 orders / up to 5 products
Own brand	name up to 40 characters, logo up to 200 KB
Team with a lead	up to 6 members (roles and agents), 1 to 6 work steps
Templates	56 (50 flows, 6 agents) in 8 areas

Academy	6 learning paths, 28 lessons; quiz with 4 questions, passed with 3 correct
Demo access	24 hours; files and texts up to about 2 MB
Confirmation link for orders on invoice	48 hours, single use
App languages	German, English, Italian, French, Spanish

29 Glossary

TERM	EXPLANATION
Academy	Learning area in KI.ordo with learning paths, lessons, exercises and quizzes; progress is tracked per person.
Agent	AI assistant with instructions, a model and assigned knowledge.
AI credit	Amount in euros per month included in your plan for AI usage, calculated at Anthropic's list prices.
AI router	Building block that uses AI to assign a text to one of several categories and then branches accordingly.
API key	Access code that other programs use to call KI.ordo. It starts with `ordo_`. Not to be confused with the access to Claude, which the provider sets up.
Building block	One step in a flow.
Claude	Anthropic's AI model, which writes the answers in KI.ordo.
Company account (SSO)	Signing in with your company's Microsoft or Google account instead of a password, if the provider has set it up.
Creativity	How freely an agent phrases things, from 0 (precise) to 1 (free). Technical term: temperature.
Customer portal	Stripe's page for payment method, invoices, plan changes and cancellation.
Demo access	Workspace with sample content for trying KI.ordo out, started with "Start demo" on the pricing page; valid for 24 hours, with sample answers and locked features, then deleted.
Flow	Sequence of building blocks that turns an input text into a result.
GiroCode	QR code on the invoice that fills in the bank transfer in your banking app.
Handover	A website visitor's request to hear back from a person.
Instructions	Fixed text that sets an agent's role, task and limits.
Knowledge gap	A question for which an agent found nothing in its knowledge.
Learning path	Series of lessons on one topic in the Academy, ending with a quiz.
Lesson	Short learning unit in the Academy with an explanation and a "Try it now" exercise.
MCP	Model Context Protocol: a standard through which Claude, Claude Code and other AI programs use KI.ordo's agents, flows and knowledge as tools.
Order on invoice	Ordering a plan as a business on the website, paid by bank transfer instead of through Stripe. Confirmed via a link sent by email.
Own brand (white label)	Your own name, colour and logo instead of "KI.ordo"; on the Enterprise plan.
Placeholder	An expression such as `{{last}}` or `{{datum}}` that KI.ordo replaces with text when running.
Plan	Start, Team, Business or Enterprise; sets the scope and AI credit.

RACI	Responsible, Accountable, Consulted, Informed: who carries out, who is accountable, who is consulted, who is informed.
Sample answer	Answer marked as such, produced without real AI, for example in the demo access or when the AI is not connected.
Schedule	Setting that starts a flow automatically at regular intervals.
Shopify	E-commerce platform; KI.ordo reads orders and products via the “Shopify” building block.
Source / knowledge source	A text in the knowledge, e.g. “Client FAQ”.
Stripe	Payment provider through which plans are booked and paid for.
Subscription	Ongoing contract for a plan, paid via Stripe or by invoice.
Team with a lead	Building block in which an AI lead distributes a brief to roles or agents and combines the results.
Template	Ready-made agent or flow that can be imported with one click.
Token	The AI’s billing unit; roughly four characters of text.
Token limit	Monthly cap on a workspace’s AI usage.
Tool	An agent’s ability to look something up or trigger something by itself while answering.
Webhook	Secret web address; calling it starts a flow.
Website chat (widget)	An agent’s chat window on another website.
Workspace	Self-contained area with its own content and its own team.

More than 350 further terms on AI, agents, data, security and organisation are explained in the **Glossary** on the website under Resources › Glossary, with a search and a page of its own for each term.