

Homelegance AI Chatbot Platform — Board Review Summary

Prepared for: Board of Directors, Homelegance

Date: April 17, 2026

Platform: homelegance-j3fmicxd.manus.space

Executive Overview

Homelegance's dealer portal is the primary digital touchpoint for thousands of wholesale dealers who rely on it daily to create orders, track open orders (3,284 active), review invoices, and access product downloads. The portal handles a high volume of routine dealer inquiries — order status, shipment tracking, return requests, and product information — that currently require manual support team intervention.

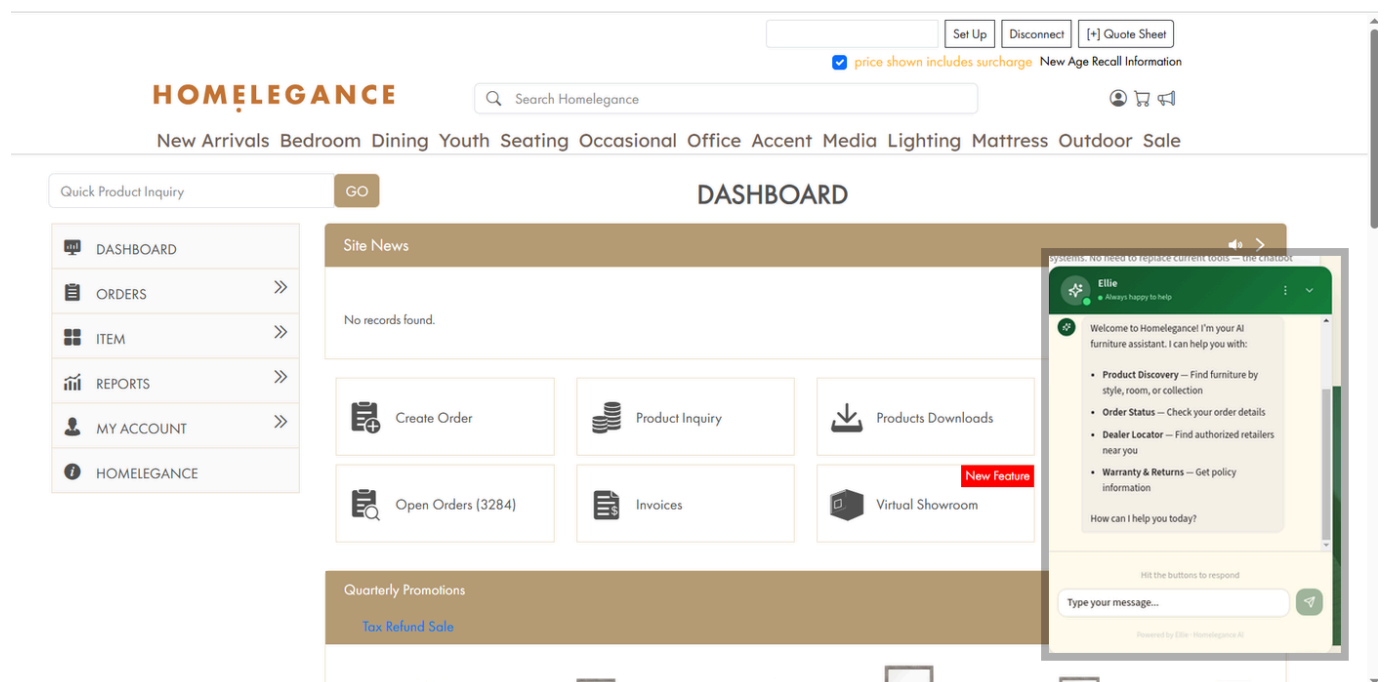


Figure 1 — The Homelegance dealer portal dashboard with Ellie, the AI chatbot widget, open in the bottom-right corner. Ellie greets dealers and offers instant help with product discovery, order status, dealer locator, and warranty inquiries.

The Homelegance AI Chatbot Platform is a full-stack customer service solution designed to integrate directly into this dealer portal environment. The platform combines an AI-powered chatbot named **Ellie** with a comprehensive agent dashboard, workflow automation, and a knowledge management system inspired by industry-leading tools such as Tidio's Lyro AI Agent. By embedding Ellie into the dealer portal, Homelegance can deflect the majority of routine dealer inquiries — order status checks, shipment tracking, return

authorizations, and FAQ responses — automatically, 24/7, without requiring support staff intervention. This reduces operational support costs while delivering faster, more consistent responses to dealers at scale.

Key Capabilities at a Glance

| Capability | Description | Status |
|--|---|---------|
| AI Chatbot (Ellie) | LLM-powered conversational agent with knowledge base lookup | Live |
| Agent Dashboard | Real-time conversation monitoring, reply, and escalation management | Live |
| Knowledge Management | Q&A data source, product catalog, and AI-generated suggestions | Live |
| Workflow Designer — Support Flows | Visual flow builder with 5 live support automation flows | Live |
| Workflow Designer — Leads / Sales / Others | Additional flow categories for lead capture, sales, and custom flows | Pending |
| Playground | Interactive chatbot testing environment for agents and admins | Live |
| Analytics | Resolution rate tracking, response time metrics, and category breakdown | Live |
| Role-Based Access | Admin, Agent, and User roles with granular permission controls | Live |
| User Management | Invitation system, bulk actions, CSV export, and activity logging | Live |

1. AI Chatbot — Ellie

Ellie is the customer-facing AI assistant that greets visitors with guided quick-reply buttons — **Hot Deals**, **Order Status**, and **Product Catalog** — modeled after the Tidio chat widget pattern. When a customer selects an option or types a question, Ellie follows a three-tier response strategy:

Knowledge Base First. Before invoking the LLM, Ellie searches the imported Q&A knowledge base using semantic matching. If a stored answer matches the customer's intent (accounting for synonyms and paraphrased questions), Ellie returns that curated answer directly. This ensures consistency and accuracy for frequently asked questions.

Product Catalog Lookup. For product-related inquiries, Ellie searches the imported product catalog by name, SKU, category, and collection, returning structured product information including pricing, availability, and descriptions.

LLM Fallback with Learning. When no knowledge base or product match is found, Ellie generates a response using the LLM. Unanswered questions are automatically logged as **Suggestions** in the Knowledge section, enabling the team to continuously expand the knowledge base from real customer interactions.

2. Agent Dashboard

The Agent Dashboard provides a centralized workspace for support staff to monitor and manage all conversations in real time.

Homecogence

Home

Conversations

Playground

Workflow Designer

Analytics

Knowledge

User Management

Conversations

Monitor and respond to customer chatbot conversations with Ellie.

15
Total Chats

9
Active

0
Escalated

1
Resolved

5
Closed

Search by name, email, customer ID, sales rep...

Filters

Last Activity

| <input type="checkbox"/> | Visitor | Customer ID | Sales Rep | Agent | Status | MSGS | CONTACT | Last Active |
|--------------------------|---------|-------------|-----------|-------------|----------|------|-------------|-------------|
| <input type="checkbox"/> | Visitor | — | — | — | ACTIVE | 5 | #acZ7Rzzj2l | Apr 11 |
| <input type="checkbox"/> | Visitor | — | — | — | ACTIVE | 5 | #sjNjZ7oLQq | Apr 10 |
| <input type="checkbox"/> | Visitor | — | — | — | ACTIVE | 1 | #VysL_Alr5F | Apr 10 |
| <input type="checkbox"/> | Visitor | — | — | — | ACTIVE | 3 | #kADTnxrrGQ | Mar 27 |
| <input type="checkbox"/> | Visitor | — | — | — | ACTIVE | 11 | #zzqzbJB3_0 | Mar 27 |
| <input type="checkbox"/> | Visitor | — | — | yuqing dong | RESOLVED | 5 | #cp3RIP4Oac | Mar 26 |
| <input type="checkbox"/> | Visitor | — | — | yuqing dong | CLOSED | 9 | #yHlSpBdkq | Mar 26 |
| <input type="checkbox"/> | Visitor | — | — | yuqing dong | CLOSED | 5 | #NzERgg1IoC | Mar 26 |
| <input type="checkbox"/> | Visitor | — | — | — | ACTIVE | 4 | #1Z6BUuqTX4 | Mar 26 |
| <input type="checkbox"/> | Visitor | — | — | — | ACTIVE | 11 | #EITuMvMmnc | Mar 26 |

| | | | | | | | | |
|--------------------------|---------|---|---|---------------|--------|---|--------------|--------|
| <input type="checkbox"/> | Visitor | — | — | — | ACTIVE | 1 | #adFMn4HyGg | Mar 26 |
| <input type="checkbox"/> | Visitor | — | — | — | ACTIVE | 1 | #A6JcK0KnQ7 | Mar 25 |
| <input type="checkbox"/> | Visitor | — | — | Chelsea Zhang | CLOSED | 3 | #hINdWz2Nb6 | Mar 25 |
| <input type="checkbox"/> | Visitor | — | — | yuqing dong | CLOSED | 2 | #acAbDMidkN | Mar 25 |
| <input type="checkbox"/> | Visitor | — | — | Chelsea Zhang | CLOSED | 3 | #FvINvutwHfy | Mar 24 |

Preview mode This page is not live and cannot be shared directly. Please publish to get a public link.

Figure 2 — Agent Dashboard showing the conversation table with Customer ID, Sales Rep, Agent Name, status, and message count columns.

The conversation table displays **Customer ID, Sales Rep, Agent Name**, conversation status, message count, and timestamps. Agents can search across visitor names, emails, and message content, and filter by status (active, escalated, resolved, closed), assigned agent, and date range. Pagination supports high-volume environments, and bulk actions allow agents to close, resolve, or delete multiple conversations at once.

When an agent opens a conversation, the **Chat Panel** displays the full message history with the ability to reply directly. Browser and in-app **push notifications** alert agents when customers send new messages, ensuring timely responses even when the dashboard tab is not in focus.

3. Knowledge Management

The Knowledge section, inspired by Tidio's Lyro AI Agent, is organized into three tabs:

| <div> <div>Homelegance</div> <div> <div>Home</div> <div>Conversations</div> <div>Playground</div> <div>Workflow Designer</div> <div>Analytics</div> <div>Knowledge</div> <div>User Management</div> </div> </div> <div> <div>Knowledge</div> <div>Manage the knowledge base that powers your chatbot. Import Q&A pairs, product data, and review unanswered questions.</div> <div> <div>Data Source</div> <div>Product</div> <div>Suggestions</div> </div> <div> <div>How Data Sources Work</div> <div>Add Q&A pairs here and the chatbot will use these answers when customers ask similar questions. Import from CSV/JSON files, add manually, or reference a URL. The chatbot matches customer questions to your knowledge base before falling back to AI.</div> <div> <div>Search Q&A pairs...</div> <div>Add Knowledge</div> </div> <div> <div>103</div> <div>Total Q&A Pairs</div> </div> <div> <div>103</div> <div>Active</div> </div> <div> <div>9</div> <div>Total Uses</div> </div> <div> <div>0</div> <div>Categories</div> </div> </div> <div> <table> <tr> <th>Question</th> <th>Answer</th> <th>Source</th> <th>Category</th> <th>Uses</th> <th>Status</th> <th>Actions</th> </tr> <tr> <td>How do I check the status of my or...</td> <td>You can check your order status by logging i...</td> <td>CSV Import</td> <td>—</td> <td>8</td> <td>Active</td> <td> </td> </tr> <tr> <td>How long does it take to process ...</td> <td>Most orders are processed within 1–3 busin...</td> <td>CSV Import</td> <td>—</td> <td>0</td> <td>Active</td> <td> </td> </tr> <tr> <td>Can I modify my order after placin...</td> <td>You may request a modification within 24 h...</td> <td>CSV Import</td> <td>—</td> <td>0</td> <td>Active</td> <td> </td> </tr> <tr> <td>Can I cancel my order?</td> <td>Orders can be cancelled without charge if d...</td> <td>CSV Import</td> <td>—</td> <td>0</td> <td>Active</td> <td> </td> </tr> </table> </div> </div> | | | | | | | Question | Answer | Source | Category | Uses | Status | Actions | How do I check the status of my or... | You can check your order status by logging i... | CSV Import | — | 8 | Active | | How long does it take to process ... | Most orders are processed within 1–3 busin... | CSV Import | — | 0 | Active | | Can I modify my order after placin... | You may request a modification within 24 h... | CSV Import | — | 0 | Active | | Can I cancel my order? | Orders can be cancelled without charge if d... | CSV Import | — | 0 | Active | |
|---|---|------------|----------|------|--------|---------|----------|--------|--------|----------|------|--------|---------|---------------------------------------|---|------------|---|---|--------|--|--------------------------------------|---|------------|---|---|--------|--|---------------------------------------|---|------------|---|---|--------|--|------------------------|--|------------|---|---|--------|--|
| Question | Answer | Source | Category | Uses | Status | Actions | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| How do I check the status of my or... | You can check your order status by logging i... | CSV Import | — | 8 | Active | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| How long does it take to process ... | Most orders are processed within 1–3 busin... | CSV Import | — | 0 | Active | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Can I modify my order after placin... | You may request a modification within 24 h... | CSV Import | — | 0 | Active | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Can I cancel my order? | Orders can be cancelled without charge if d... | CSV Import | — | 0 | Active | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | | | | | | | |
|---|--|------------|---|---|--------|--|--|
| What payment methods do you ac... | We accept major credit cards (Visa, Masterc... | CSV Import | — | 0 | Active | | |
| Will I receive an order confirmation? | Yes, a confirmation email is sent to the ema... | CSV Import | — | 0 | Active | | |
| What do I do if I never received a c... | Please check your spam or junk folder first. ... | CSV Import | — | 0 | Active | | |
| How do I track my shipment? | Once your order ships, you'll receive an em... | CSV Import | — | 0 | Active | | |
| My tracking number isn't working.... | Tracking numbers can take 24-48 hours to ... | CSV Import | — | 0 | Active | | |

Chelsea Zhao Admin

Preview mode This page is not live and cannot be shared directly. Please publish to get a public link.

Figure 3 — Knowledge page showing the Data Source tab with 103 active Q&A pairs imported from CSV.

Data Source stores question-and-answer pairs that Ellie uses to respond to customer inquiries. Admins can add entries manually, import from CSV/JSON files, or import from a URL. The chatbot performs semantic matching against these entries before falling back to the LLM.

Product stores the full product catalog. The platform supports Homelegance's native Excel product sheet format (.xlsx), parsing the Catalog sheet (Model, Description, Categories, Collection, Price, Availability, Features, Dimensions) and joining the Image Link sheet by Model number. Products can also be added manually, via CSV/JSON, or through a feed URL or API connection.

Suggestions automatically captures questions that Ellie could not answer from the knowledge base. Each suggestion tracks occurrence count and intent. Admins can review a suggestion, write an answer, and promote it to a knowledge entry — or ignore it. This creates a continuous improvement loop driven by real customer interactions.

4. Workflow Designer

The Workflow Designer provides a visual, drag-and-drop canvas for building conversation flows. Flows are organized into four categories with sub-categories:

Homelegance

Workflow Designer

Categories:

- All Flows (7)
- Support Flows (5)
- Leads Flows (1)
- Sales Flows (1)
- Others (0)

Check Order Status: Let customers check their order status by providing an order number. Orders, Popular, Self-Service, 7 nodes. Use Template, Preview.

Track Shipment: Help customers track their shipment with real-time updates. Shipping, Popular, 5 nodes. Use Template, Preview.

Submit Return Request: Guide customers through the return process step by step. Returning, Self-Service, 8 nodes. Use Template, Preview.

Cancel Order: Process order cancellation requests with eligibility checks. Cancelling, 7 nodes. Use Template, Preview.

New Flow

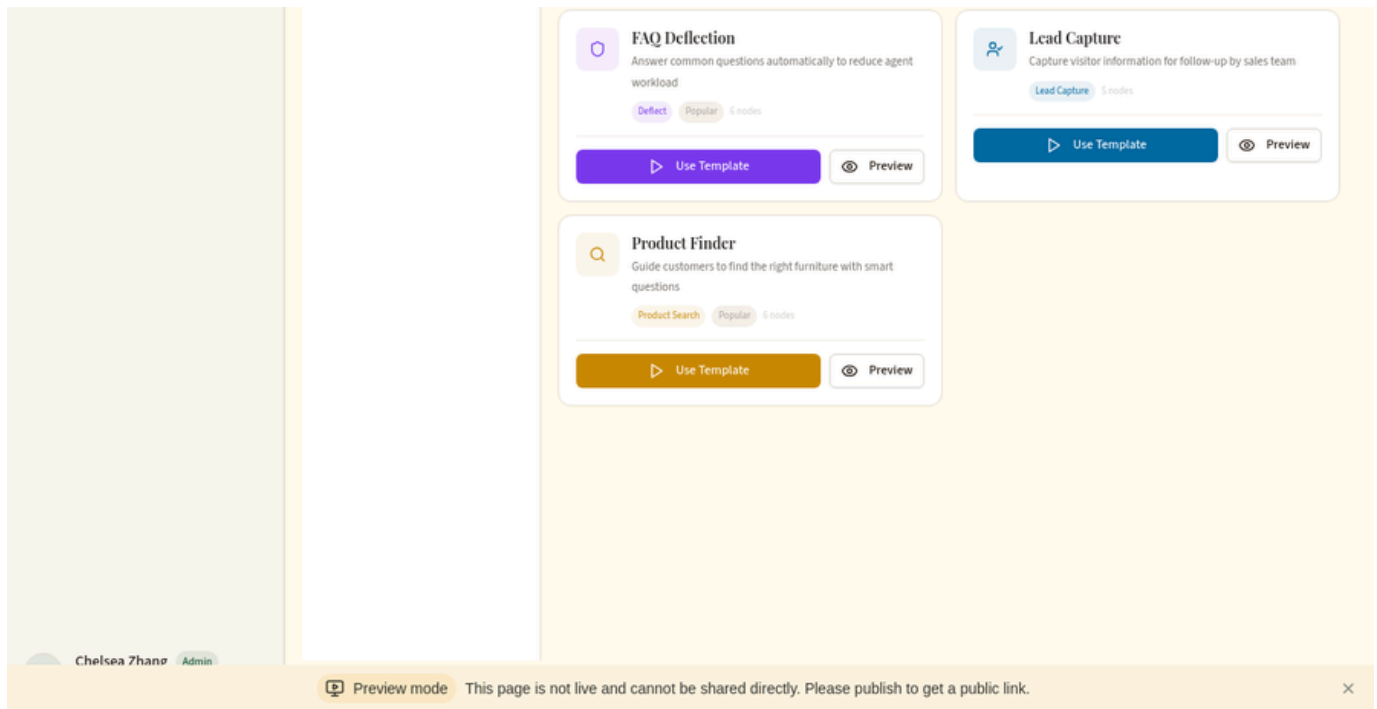


Figure 4 — Workflow Designer showing the Support Flows category with live automation templates.

| Category | Sub-categories | Status |
|----------------------|--|-------------|
| Support Flows | Orders, Shipping, Returning, Cancelling, Deflect, Self Service | Live |
| Leads Flows | Lead Capture, Qualify, Nurture | Pending |
| Sales Flows | Product Search, Recommendations, Dealer Locator | Pending |
| Others | Custom flows | Pending |

Support Flows are currently live and connected to the chatbot engine. The following five automation flows are active in production:

1. **Check Order Status** — retrieves real-time order status by customer ID
2. **Track Shipment** — provides shipment tracking information and carrier details
3. **Submit Return Request** — guides customers through the return authorization process
4. **Cancel Order** — handles order cancellation requests within the eligible window
5. **FAQ Deflection** — matches common questions to knowledge base answers before escalating

Leads Flows, Sales Flows, and Others are available as templates in the designer UI but are not yet connected to the live chatbot engine. These categories are on the product roadmap for the next development phase.

The designer supports multiple node types including **Greeting** (with automatic customer ID detection), **Intent Detection**, **Response**, **Condition**, **Escalation**, **Customer Data** (CRM lookup), **Sales Order** (order history queries), and **Content Guardrail** (blocks sensitive topics such as revenue, margin, and internal pricing). An **AI Suggestions** panel analyzes conversation patterns and recommends new nodes, which admins can **Approve**, **Wait**, or **Decline**.

5. Playground

The Playground provides an interactive testing environment where agents and admins can simulate customer conversations with Ellie before deploying changes.

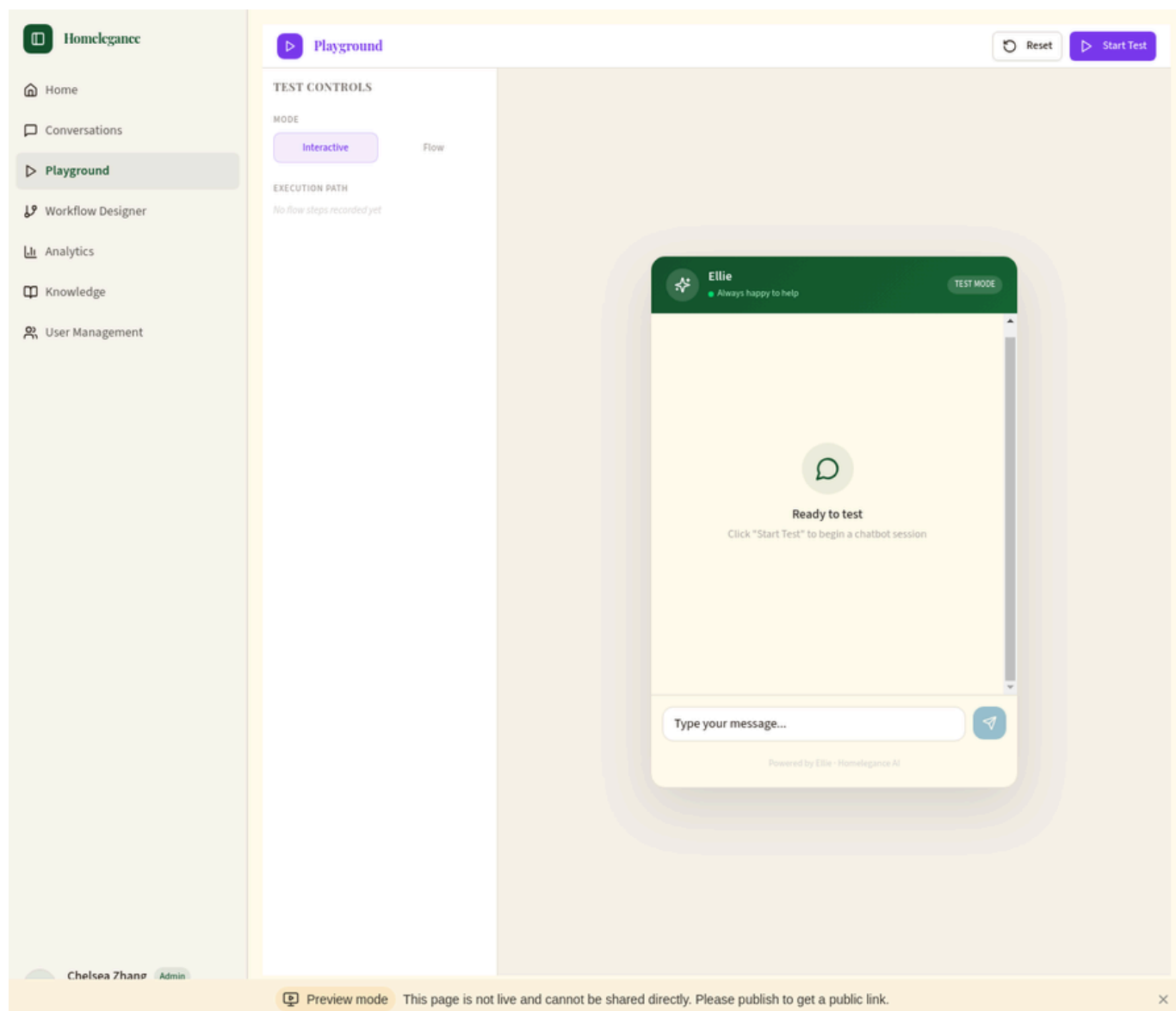


Figure 5 — Playground page for testing chatbot flows interactively before production deployment.

Users can select specific flows to test, observe the execution path in real time, and reset sessions to iterate quickly. This reduces the risk of deploying untested conversation logic to production.

6. Analytics

The Analytics dashboard tracks key performance indicators for the chatbot operation.

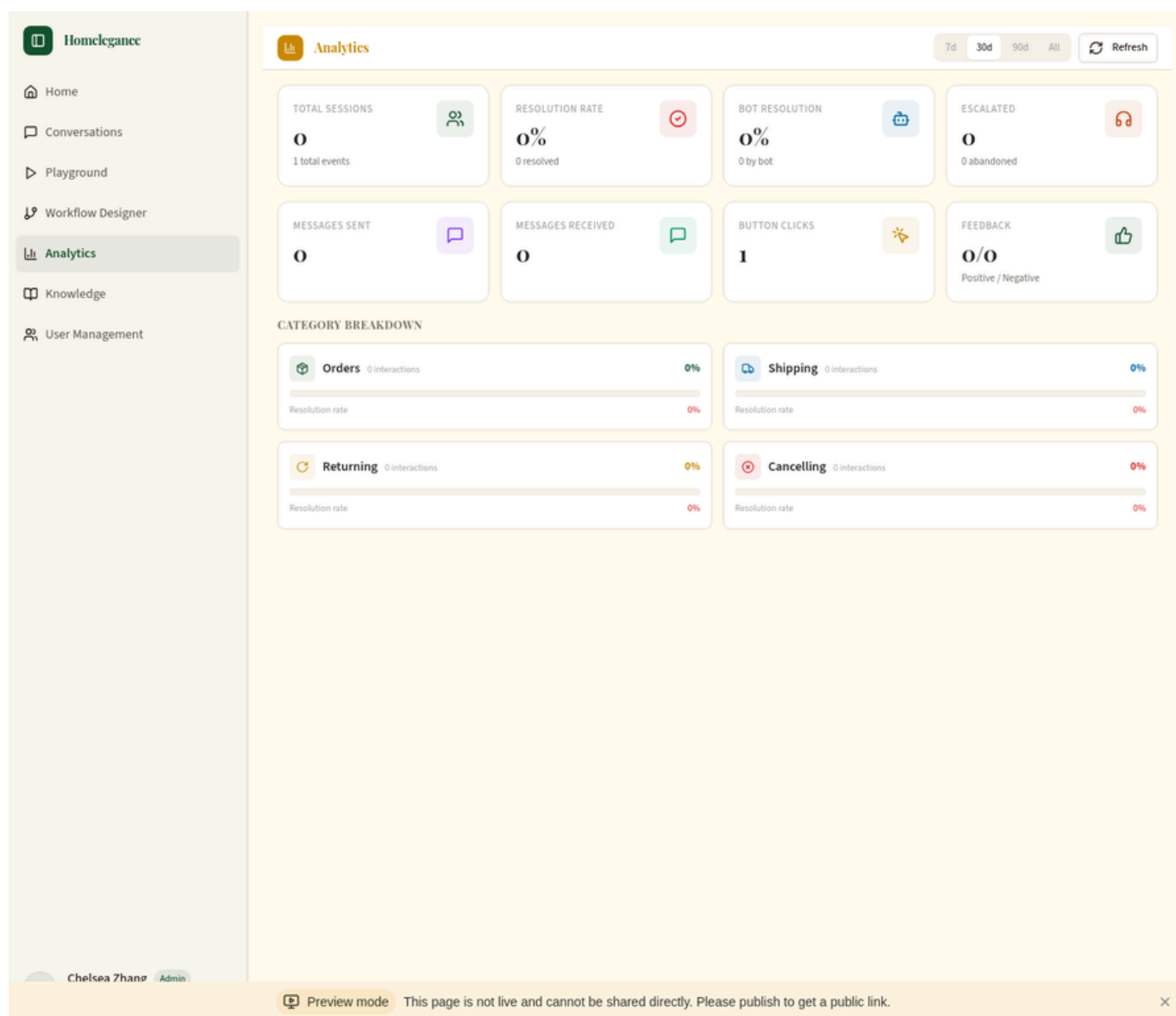


Figure 6 — Analytics dashboard showing resolution rate, session counts, message volume, and category breakdown.

The dashboard surfaces four primary metrics: **Resolution Rate** (percentage of conversations resolved by Ellie versus escalated to a human agent), **Interactions Over Time** (conversation volume trends), **Average Response Time** (measures how quickly Ellie

and agents respond), and **Category Breakdown** (distribution of inquiries across Orders, Shipping, Returning, Cancelling, and other topics).

7. Security and Access Control

The platform implements a three-tier role system — **Admin**, **Agent**, and **User** — with granular permission controls enforced at both the backend procedure level and the frontend navigation level. Admins have full access to all features including the Workflow Designer, Knowledge Management, User Management, and Analytics. Agents can access the Dashboard and Playground. Users represent customer-facing accounts.

The User Management module supports email-based invitations with unique invite links, invitation status tracking (pending, accepted, expired, revoked), bulk role changes, user deletion with cascade handling, and CSV export. Password authentication includes registration, login, forgot password (with reset link delivery via the notification system), and secure token-based password reset.

Technical Foundation

| Component | Technology |
|----------------|---|
| Frontend | React 19, Tailwind CSS 4, shadcn/ui, Framer Motion |
| Backend | Express 4, tRPC 11 (end-to-end type safety) |
| Database | MySQL/TiDB with Drizzle ORM |
| AI | LLM integration with semantic knowledge matching |
| File Storage | S3-compatible object storage |
| Authentication | Email/password with session cookies + Manus OAuth |
| Testing | Vitest — 171 tests across 6 test suites, all passing |

Summary

The Homelegance AI Chatbot Platform delivers a production-ready customer service solution that combines AI automation with human agent oversight. The knowledge-first architecture ensures that Ellie provides accurate, consistent answers drawn from curated Q&A data and the product catalog, while the continuous suggestion loop ensures the system improves with every customer interaction. Support Flows are live and actively handling order status, shipment tracking, returns, cancellations, and FAQ deflection. Leads, Sales, and custom flow categories are available in the designer and are planned for the next development phase. The platform is live, tested, and ready for pilot deployment with Homelegance's dealer network.