

Agentum

User Manual

Version 0.3

October 2026

Table of Contents

What's changed in version 0.3

About this manual

- The people in this manual
- Who this manual is for
- How the manual is organized
- About the screenshots
- About this version

Getting started

- Sign in and create your account
- Start a chat
- Choose a chat model and thinking level
- Browse agents and start a chat
- Switch workspaces and manage access

Chats

- Attach files to a chat
- Follow what the agent is doing
- Charts, documents and artifacts in a chat
- Copy, rate or retry a response
- Handle a failed or interrupted response
- Find and manage previous chats
- Share a saved chat
- Use Work mode
- Dictate a message
- Talk using live voice
- Generate an image
- Schedule a task
- Use the browser extension

Agents

- Create a custom agent
- Edit an agent
- Turn on agent behavior options
- Give an agent skills
- Attach knowledge bases to an agent
- Choose the plugin tools an agent can use
- Let an agent delegate to other agents
- Configure agent memory
- Protect sensitive data with guardrails
- Make an agent answer in a fixed format
- Set agent execution limits
- Choose voice and vision models for an agent
- Connect an agent to a Telegram or Bale bot

Plugins and skills

- Browse plugins and see what they offer
- Connect a plugin
- Add your own plugin to the workspace
- Add and manage skills
- Create or upload a workspace skill

Projects, files and sites

- Create a project
- Work with project files, chats and usage
- Browse, preview and download files in the Library
- Create and manage a site
- Preview a site and request targeted edits

Knowledge and documents

- Create and manage a knowledge base
- Add files, links and recordings to a knowledge base
- Ask questions about your knowledge bases
- Write a Page and ask AI about it

Workspaces and teams

- Create a shared workspace
- Add a workspace member
- Change member roles, status and groups
- Create and inspect workspace roles
- Create and manage workspace groups
- Restrict workspace models, plugins and Work
- Workspace administration
- Analytics

Account, plan and billing

- Profile
- Edit profile
- Change your username
- Set or change your password
- Login options
- Active sessions
- Subscription
- Payment history
- Usage
- Understand plans and usage limits
- Storage

Personalize Agentum

- General
- Appearance
- Accent color
- Contrast
- Language
- Keyboard
- Notifications
- Voice settings
- Personalization
- Agent personality
- Conversation starters
- Memory
- Models
- Model
- Plugins in Settings
- Plugin tools

Telegram

- Telegram in Settings
- Telegram Application Bot
- Chat Automation
- Chat Automation instructions
- Chat Automation plugins and tools

Privacy, help and support

- Data controls
- Your data: what you can save, and what you cannot do yet
- Help center
- Report an issue
- About

Glossary

What’s changed in version 0.3

Compared with version 0.2

This edition tells Agentum through five people around one small shop, opens every chapter with a short story, and starts each section from the reader’s situation. It also covers what changed in the app: knowledge bases with cited answers, document Pages, a drawing canvas for images, a personal greeting and preferred name, the redesigned Plugins page with plugins on every plan, tools that run without asking (now the default), longer recordings, read aloud and formulas in answers.

Product changes

- Knowledge bases with cited answers. A new Knowledge section keeps your documents, web pages and recordings in knowledge bases that agents search. You can add files, links and recordings, watch each item until it is ready, test the search and see the plan limits. Mention a knowledge base in a message with @ (or Add knowledge in the + menu) and the answer comes with numbered sources that open the original page or time. The agent editor attaches knowledge bases to an agent, and projects get a fourth tab, Knowledge, with their own knowledge base.

  Sections: “Create and manage a knowledge base”, “Add files, links and recordings to a knowledge base”, “Ask questions about your knowledge bases”, “Attach knowledge bases to an agent”, “Edit an agent”, “Create a project”, “Work with project files, chats and usage”, “Attach files to a chat”, “Understand plans and usage limits”
- Documents and Pages. A new Documents section lets you write Pages in a block editor with an AI assistant beside it, add comments, a cover and an icon, and download a Page as Markdown, Word or PDF.

  Sections: “Write a Page and ask AI about it”
- A new Plugins page. Plugins are now one searchable list of public and workspace plugins, with All, Connected and category filters and a Connect button on each row. Every plan includes plugins and there is no cap on connected ones. A plugin address must be a public https address. For a Telegram or Bale bot, visitors get only the plugin tools you picked one by one, and each of those calls still waits for your approval.

  Sections: “Browse plugins and see what they offer”, “Connect a plugin”, “Add your own plugin to the workspace”, “Choose the plugin tools an agent can use”, “Follow what the agent is doing”, “Connect an agent to a Telegram or Bale bot”
- Tool approval. The default is now Always allow, so web chats no longer ask. With the other choices, a card in the message asks you to approve or reject a plugin tool. Scheduled tasks and live voice cannot ask: a scheduled task that needs approval fails and tells you to run it from a chat, and live voice no longer offers plugin tools.

  Sections: “Plugins in Settings”, “Follow what the agent is doing”, “Start a chat”, “Handle a failed or interrupted response”, “Schedule a task”, “Talk using live voice”
- Your name and a new greeting. Sign-up and the profile now ask for a Full name and for what Agentum should call you, and the profile can hold an optional birthday. The new-chat page greets you by the time of day, the weekday and the season, and a card asks once what to call you.

  Sections: “Sign in and create your account”, “Start a chat”, “Use Work mode”, “Profile”, “Edit profile”
- Waitlist sign-in and longer passwords. While sign-ups are closed, the login page offers a waitlist form instead of registration, and a Telegram account that is not linked yet lands on the same form. A password now needs at least 10 characters (it was 6).

  Sections: “Sign in and create your account”, “Set or change your password”

- No online payment yet. Plans cannot be bought online for now: the plans page and the Create a workspace page say online payment is coming soon and ask you to contact us, the upgrade buttons are turned off, and the simulated checkout steps are gone.
  Sections: “Understand plans and usage limits”, “Subscription”, “Payment history”, “Create a shared workspace”
- The usage-limit message names the reset time. When the time is known, the message you see after reaching your limit now says when the allowance resets.
  Sections: “Start a chat”, “Choose a chat model and thinking level”, “Handle a failed or interrupted response”, “Generate an image”, “Understand plans and usage limits”
- No prices in model lists. Models no longer show a price or “Free” in the picker or in Settings; the icons for what a model can do stay.
  Sections: “Choose a chat model and thinking level”, “Models”
- Longer recordings, dictation and voice, and Read aloud. Audio recordings can be up to 300 MB and 2 hours and are transcribed with speaker labels. Dictation and live voice sessions now last 2 hours and show the time left in the last 5 minutes. A Read aloud button under finished answers reads the reply out loud.
  Sections: “Attach files to a chat”, “Dictate a message”, “Talk using live voice”, “Copy, rate or retry a response”
- Formulas, safer previews and a drawing canvas. Math formulas in answers appear as typeset math. A preview that tries to open another page is stopped, and pictures from outside sites are blocked with a link to open them. The Images page has a “Draw” button that opens a drawing canvas, and “Add to message box” attaches the drawing to your message.
  Sections: “Charts, documents and artifacts in a chat”, “Generate an image”
- Language in the account menu. The account menu at the bottom of the sidebar has a “Language” row, so you can switch between English and Farsi without opening Settings.
  Sections: “Switch workspaces and manage access”, “Language”

Updated examples and rules

- Every section now opens from the reader’s situation, often through one of the five people in this manual (Sara, Neda, Parisa, Kian and Mina), instead of a dry description. Every section was rewritten this way. Steps, results and troubleshooting are unchanged unless the product changed.

Corrections

- A review against the app found details the previous edition got wrong: menu and page names, error messages, where some actions live, and a few limits. These sections now match what you see.
  Sections: “Connect an agent to a Telegram or Bale bot”, “Attach files to a chat”, “Browse plugins and see what they offer”, “Follow what the agent is doing”, “Charts, documents and artifacts in a chat”, “Connect a plugin”, “Create a project”, “Dictate a message”, “Edit an agent”, “Generate an image”, “Understand plans and usage limits”, “Choose the plugin tools an agent can use”, “Work with project files, chats and usage”, “Copy, rate or retry a response”, “Schedule a task”, “Set or change your password”, “Payment history”, “Sign in and create your account”, “Start a chat”, “Use Work mode”

About this manual

- The introduction now introduces the five people of this manual, every chapter opens with a short story about one of them, and a new chapter, Knowledge and documents, sits after Projects, files and sites. The introduction names version 0.3. The glossary adds Knowledge base and Page.

New sections

- Attach knowledge bases to an agent
- Create and manage a knowledge base
- Add files, links and recordings to a knowledge base
- Ask questions about your knowledge bases
- Write a Page and ask AI about it

About this manual

Agentum is a workspace where your team works with AI agents: you chat with them, give them your files, connect them to the tools you already use, and let them handle recurring work. This manual explains every part of the Agentum app, from your first sign-in to workspace administration.

The people in this manual

Agentum is easier to understand through the people who use it. Throughout this manual you will meet five of them. All of them are connected to one small business, Nilgoon Home Appliances, a family-run shop that sells appliances to households. Each chapter opens with one of their stories.

Sara Karimi

Owner and manager of Nilgoon

Sara wants the shop to grow without drowning in admin. She sets up the workspace, brings the team in, and keeps an eye on plans, costs and the shop's data. You will follow her in the chapters on workspaces, plans and privacy.

Neda Rahimi

Office and customer support

Neda answers the same warranty and delivery questions twenty times a day and writes the weekly report every Saturday. She uses chats, files, the knowledge base and Telegram to get her time back. She leads the chapters on chats, knowledge and documents, and Telegram.

Parisa Nazari

Freelance graphic designer

Parisa makes Nilgoon's posters, social posts and the catalog site, often from a brief that lands at 6 pm for a sale that starts tomorrow. She leads the chapter on projects, files and sites.

Kian Moradi

Part-time developer

Kian looks after the online store and connects the shop's systems. He builds the agents the team relies on and plugs them into real stock and prices. You will follow him in the chapters on agents and on plugins and skills.

Mina Tavakoli

Homemaker and Nilgoon customer

Mina uses Agentum at home on her own account: choosing a washing machine for a family of five, planning the month's budget, a birthday invitation. She leads the first chapter and the one on making Agentum your own.

Who this manual is for

Everyone who uses Agentum: team members who chat with agents every day, people who build agents for their team, and workspace owners and admins who manage members, roles and plans. Sections that need a specific role or plan say so under **Before you start**.

How the manual is organized

Each chapter covers one area of the app, and each section inside it covers one task. Every section follows the same pattern:

Part	What it tells you
Purpose	What the task is for
Before you start	What you need first: a role, a plan, a file, a connected service
Steps	What to select, in order
Expected result	What you should see when it worked
Troubleshooting	Common problems and what to do about them

Names of buttons, menus and fields are written exactly as the app shows them, so you can find them on screen.

About the screenshots

The screenshots come from a demo workspace of a fictional appliance retailer, Nilgoon Home Appliances. All names, products, prices and chats in them are made up. Your screens will show your own workspace, and some details (such as your plan, your agents and your chats) will differ.

About this version

This is version 0.3, the third edition. It describes the app at the time of writing; Agentum changes often, so a button may move or a new option may appear before the next edition. If something does not match this manual, or you need help, contact the Agentum team through the contact page at agentum.ir.

Getting started

Mina Tavakoli · Homemaker and Nilgoon customer

It is Friday evening and Mina has to choose a washing machine for a family of five. She has never used an AI assistant, and every shop page says something different.

She opens Agentum, signs in and starts a chat. She picks a model, asks which machine suits her family and her budget, and gets a clear comparison she can read in a minute. Then she browses the agents to see who else could help. Neda, who works at Nilgoon, uses the workspace menu to move between the shop's workspace and her own.

In this chapter you will learn about "Sign in and create your account", "Start a chat", "Choose a chat model and thinking level", "Browse agents and start a chat" and "Switch workspaces and manage access".

Sign in and create your account

Purpose

Mina has heard that Agentum can help her run the household, but first she has to get in. Here you sign in, ask to join the waitlist or create an account when sign-ups are open, and finish an account that began with Telegram.

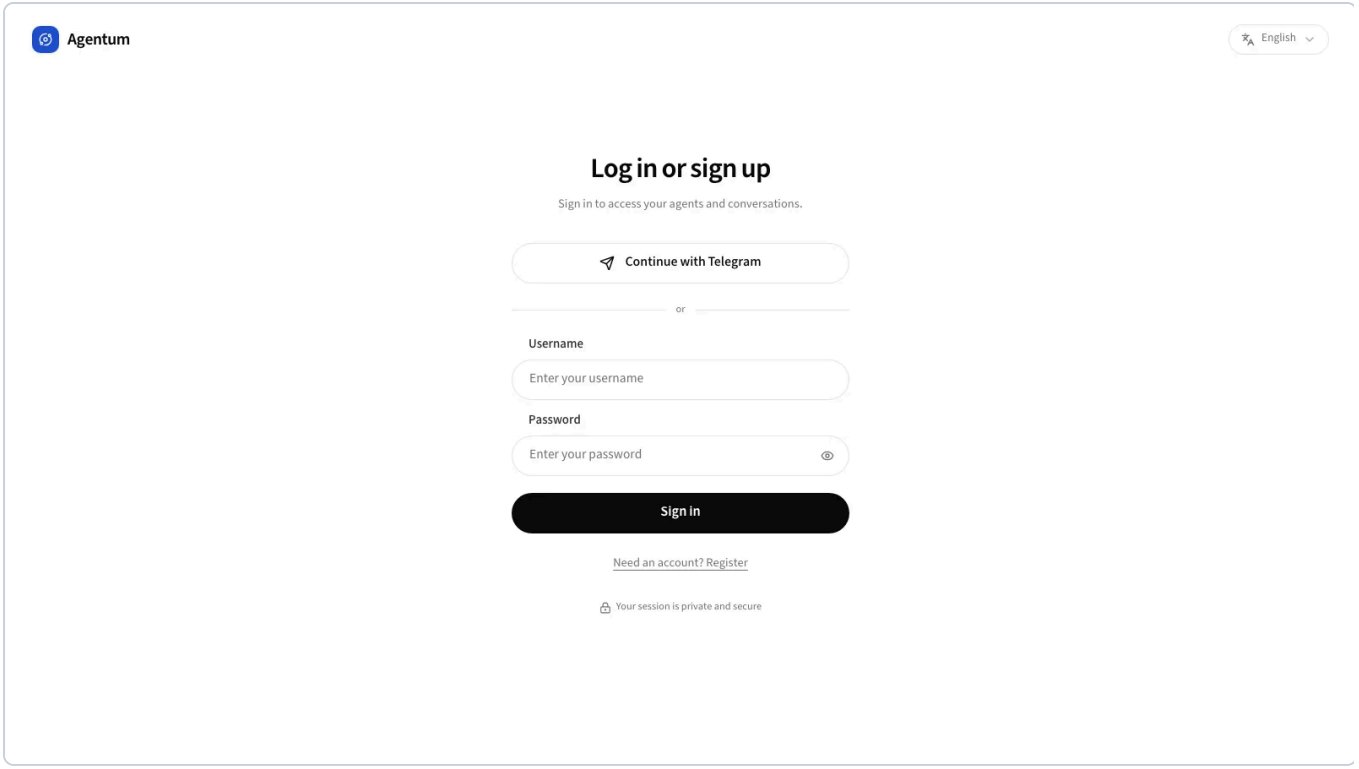
Before you start

You need your Agentum username and password, or a Telegram account. To register (when sign-ups are open) you also need a phone number with its country code. Use the "Language" menu in the top corner of the page to switch between English and Farsi at any time.

Steps

1. Open the sign-in page. The page is titled “Log in” (it reads “Log in or sign up” when sign-ups are open). Type your “Username” and “Password”, then select “Sign in”. Select the eye button at the end of the password field (“Show password” / “Hide password”) to check what you typed.
2. While sign-ups are closed, the link under the form reads “Don’t have an account? Join the waitlist”. Select it, enter your “Email address” and select “Join the waitlist”. The page says “You’re on the list”, and “Back to log in” takes you back to the form. When sign-ups are open, select “Need an account? Register” instead. The page becomes “Create your account”. Fill in:
   - “Full name”: required, up to 80 characters.
   - “What should Agentum call you?”: required, up to 40 characters. It starts with the first word of your full name, and Agentum uses it to greet you and in replies.
   - “Username”: 3 to 40 characters, using English letters, numbers, periods, underscores and hyphens. Usernames are not case sensitive.
   - “Phone number with country code”: for example +971 followed by your number.
   - “Password”: 10 to 200 characters.

   Select “Create account”. To go back, select “Already have an account? Sign in”.
3. To use Telegram instead, select “Continue with Telegram” and approve the sign-in in Telegram. You come back to Agentum signed in. While sign-ups are closed, a Telegram account that is not linked to an Agentum account lands on the waitlist form, with a note that Agentum is invite-only for now.
4. If your account is missing details, the page changes to “Complete your account”. Fill in your “Full name” and “What should Agentum call you?”, choose your “Username”, then enter your “Email address (Gmail or other)” and “Phone number with country code” and select “Complete your account”. All five fields are required.



The sign-in page

Expected result

You land on the page you were trying to open, or on a new chat if you came straight to the sign-in page. A new account starts with its own workspace. A message under the form says “Your session is private and secure”.

Troubleshooting

Problem	What to do
“The username or password is incorrect.”	Check both fields. The username is your Agentum username, not necessarily your Telegram name. Incorrect details never create a new account.
“Fill in this field.” or a length message	Complete the field the message points to. The username needs at least 3 characters and a new password at least 10.
“Sign-ups are closed for now. Join the waitlist and we will be in touch.”	Select “Don’t have an account? Join the waitlist” under the form and leave your email address.
“This username is already taken.”	Choose a different username.
“Enter a valid phone number with its country code.”	Start the number with the country code, for example +971.
“Telegram login could not be completed. Please try again.”	Select “Continue with Telegram” again. If it keeps failing, sign in with your username and password.
Your account was created with Telegram and has no password	Sign in with Telegram, then open Settings, “Login options”, and select “Set password”.
“Your session has expired. Sign in again.”	Sign in again. You return to the page you were on.

Start a chat

Purpose

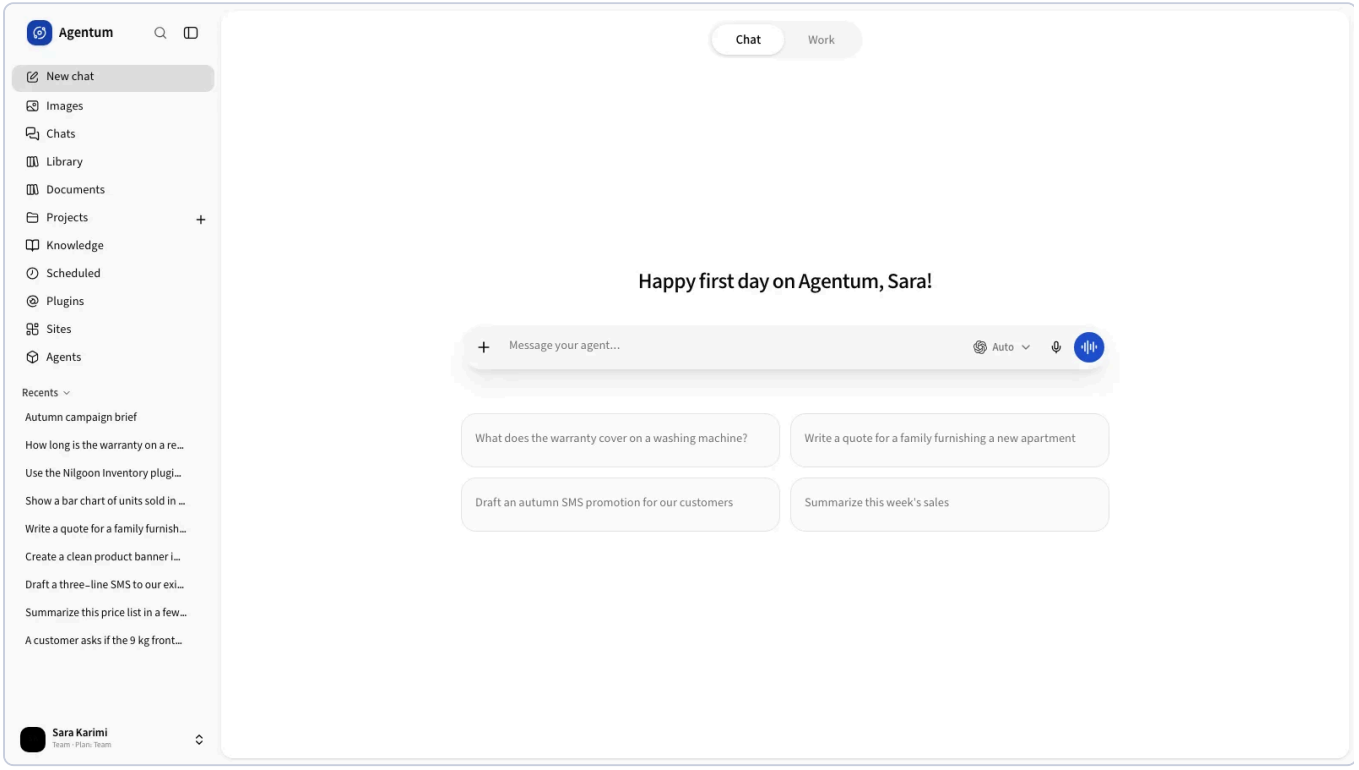
Mina wants to plan a week of dinners for a family of five and has no idea how to begin. Open a new chat, type or paste your question, and stop the reply if you change your mind.

Before you start

Sign in and pick the workspace you want to work in. Your plan and usage allowance apply to every message.

Steps

1. Open a new chat in any of these ways: select “New chat” in the sidebar, use the keyboard shortcut (Ctrl+Shift+O, or Cmd+Shift+O on a Mac, when shortcuts are on in Settings, “Keyboard”), use the message box at the top of “Chats”, or open an agent and select “Start chat”. Inside a project, the box “New chat in [project]” starts a chat that belongs to it.
2. The new-chat page for the default agent shows a greeting that changes with the time of day, the weekday and the season, usually with your name. If you turned them on, it also shows conversation starters. If Agentum does not know your name yet, a card asks “What should Agentum call you?”: type a name and select “Save”, or select “Not now”. Selecting a starter sends it at once. The “Chat” and “Work” switch at the top is explained in Use Work mode.
3. Type in the box “Message your agent…”. Press Enter to send and Shift+Enter for a new line. Select “Add to message” to attach files (see Attach files to a chat). The model and thinking level are shown at the end of the box (see Choose a chat model and thinking level).
4. Select “Send message” (the up arrow). The arrow is replaced by the “Live voice chat” button while the box is empty, and by a square “Stop generation” button while a reply is being written. The chat is saved and its page opens.
5. Watch the reply appear. If the agent asks to use a tool, it runs without asking unless you changed Settings, “Plugins”, “Tool approval” from “Always allow” (see Follow what the agent is doing). To stop a reply, select “Stop generation”, or press Esc while the message box has focus and the shortcut is enabled.
6. To write the next message quickly, press Shift+Esc to put the cursor back in the message box. Your draft is kept for each chat while you move around, and if sending fails your text comes back into the box.



A new chat with the message box

Expected result

Sending saves a conversation that you can find again in the sidebar under “Recents” and in “Chats”. A small spinner next to it means a reply is still being written, and a dot means there is a message you have not read.

Troubleshooting

Problem	What to do
“Send message” is dimmed	Type something or attach a file. If a file is still uploading, wait until its spinner stops. Remove any attachment showing a red warning, then upload it again or send without it.
“You have reached your usage limit. Try again after it resets.” or “You have reached your usage limit. It resets at [time].”	You used your allowance for now. See Understand plans and usage limits.
“The agent could not start. Please try again.” or “The assistant could not finish its response. Please try again.”	Select “Try again” on the reply, or send the message again.
“This draft was already sent. Open a new conversation.”	Open a new chat from the sidebar and send again.
“Your current plan does not include this feature.” or “Your workspace policy does not allow this kind of request.”	Ask a workspace owner or administrator, or check your plan.
The page was closed while a reply was running	Reopen the chat from “Chats”. The reply keeps running and shows when you return.

Choose a chat model and thinking level

Purpose

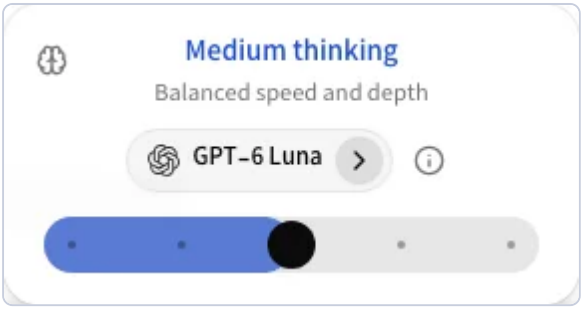
A quick reply to a customer and the month’s sales analysis do not need the same effort. Neda picks the model that answers her next message and how long it thinks first, so simple questions stay fast and hard ones get more care.

Before you start

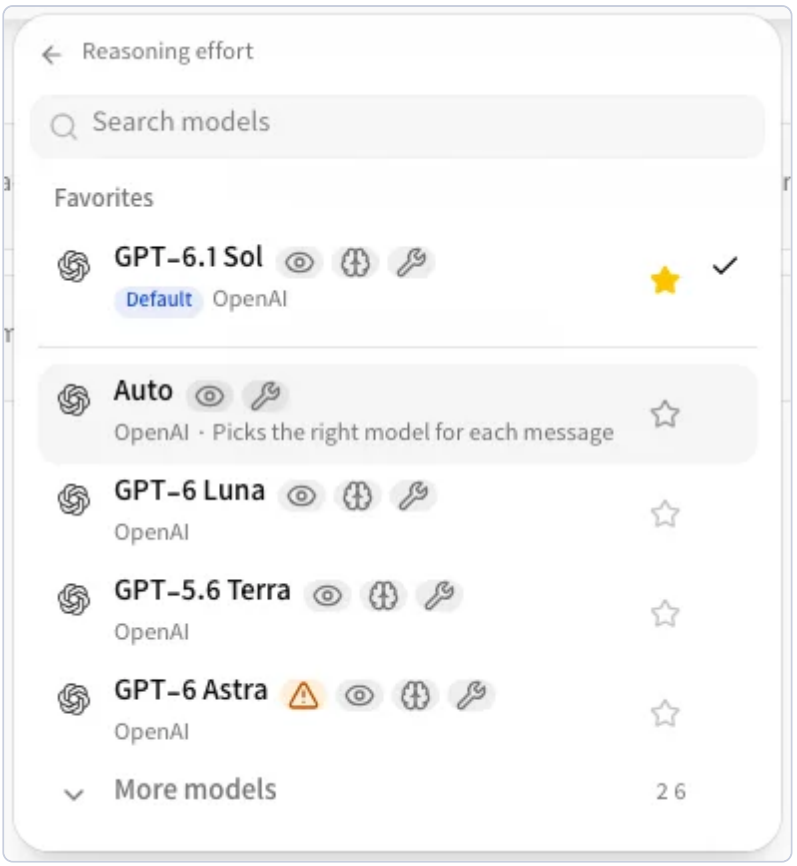
Open a chat or a new chat. The models you see are the ones your plan and workspace allow. Availability can change, so the list shown is always the current one.

Steps

1. Look at the end of the message box. The model button shows the model's name and, for models that can think, the current level, for example "Low thinking". Select it.
2. If the model can think, a small panel opens first. Drag the slider to set the level: "No thinking", "Minimal thinking", "Low thinking", "Medium thinking", "High thinking" or "Extra high thinking" (the model offers only the levels it supports). A line under the level explains it, for example "Balanced speed and depth". Higher levels give deeper answers but use your allowance faster, and a warning marks them.
3. To switch models, select the model name in that panel ("Change model"). Models that cannot think open the list directly.
4. In the list, type in "Search models" to filter. With an empty search the list shows your "Favorites" first, then a short list of recommended models, with "Auto" among them. Select "More models" to see every model, grouped by maker. Select a model to use it.
5. Read the badges on each row. "Vision" means it can read pictures. The brain badge ("Reasoning") means it can think. "Tools" means it can use web search and plugins. "No tools" means chat only: it cannot use tools and is not offered in Work mode. "Auto" shows a short hint about what it does, and the most expensive models carry a warning ("Uses your quota fast").
6. Select the star at the end of a row ("Add to favorites") to pin a model, and select it again ("Remove from favorites") to unpin it. Drag a favorite by its grip ("Drag to reorder") to change the order. Your first favorite carries the "Default" tag: new chats start with it.
7. "Auto" lets Agentum pick the right model for each message. The starting selection of a new chat follows the order described under "Expected result".
8. Send your message. The choice applies from this message on, and the chat remembers it when you come back.



The thinking level slider and the model button



The model list with favorites and badges

Expected result

Your next message is answered by the model and thinking level you chose. For a new chat the starting model is, in this order: the one you picked, the first usable favorite, the last model you used in this browser, then your default language model from Settings, “Models” (which is “Auto” unless you changed it). For a custom agent, its configured model is the fallback; for the default agent, your default language model is used. A saved chat starts from the model it last used. Default models for each kind of task (language, images, speech) are set in Settings, “Models”. In Work mode only models that can use tools are listed.

Troubleshooting

Problem	What to do
A model you expect is missing	Your plan or workspace policy may not include it, or it is not available for Work. Clear the search box and select “More models”.
“No models match your search.”	Try fewer or different words, such as the maker or model name.
A favorite is not listed	It is no longer available to you. Unavailable favorites are skipped. Choose another available model.
“This model is not available. Choose another model.” or “You no longer have access to this model.”	Open the model list and select one that is offered.
“This model cannot use tools, which Work needs. Choose a model that supports tools.”	In Work mode pick a model with the “Tools” badge.
“The selected model cannot read images. Add a text prompt or choose a model that supports images.”	Pick a model with the “Vision” badge or describe the picture in words.
“You have reached your usage limit. Try again after it resets.” or “You have reached your usage limit. It resets at [time].”	Wait for the allowance to reset or review the plan with the workspace owner. After access resumes, a lighter model or lower thinking level can reduce future usage. See Understand plans and usage limits.

Browse agents and start a chat

Purpose

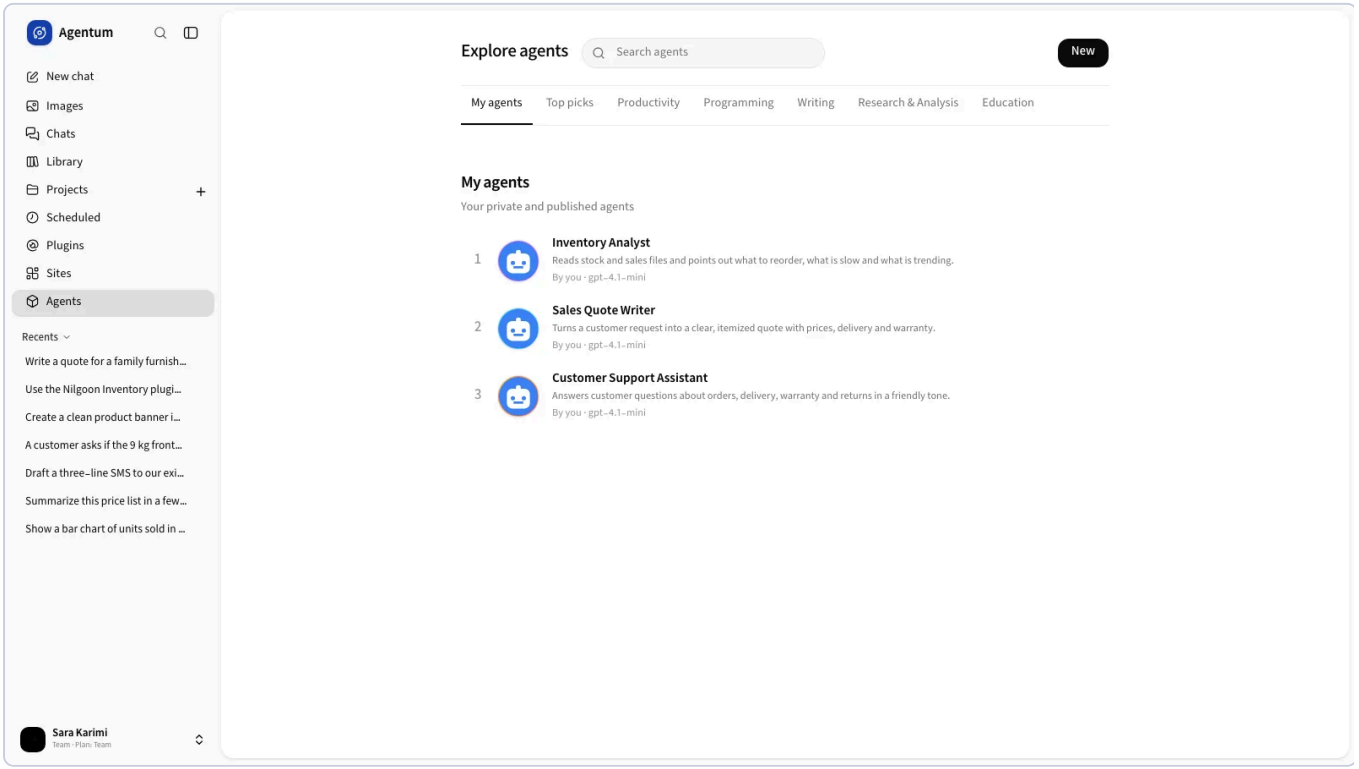
Neda wants the customer support assistant, not a blank chat. Browse the agents, read what each one does and start a chat with the one that fits.

Before you start

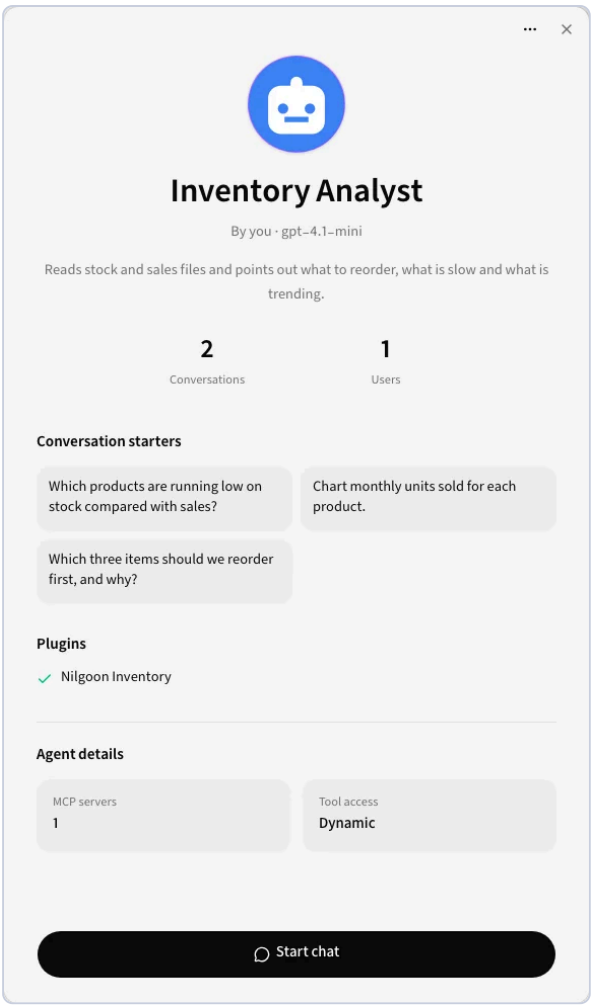
Sign in and select your workspace. “My agents” includes agents owned by your selected workspace, including unpublished agents created by other members. Agents from other workspaces appear only when they are published.

Steps

1. Open “Agents” in the sidebar. The page is titled “Explore agents”. It lists “My agents” (agents owned by your selected workspace, including unpublished agents created by other members), “Top picks” (published agents from the community, up to 12) and one section per category. Use the category bar under the title to jump to a section. When a section is long, select “See more” to show all of its agents and “See less” to collapse it again.
2. Type in “Search agents” to filter by name or description. If nothing matches, the page says “No matching agents”. Clear the search to see everything again.
3. Select an agent. A window shows its name, who made it (“By you”, “By community” or the creator’s website), its model, the number of “Conversations” and “Users”, its conversation starters, the plugins it uses and “Agent details”.
4. Selecting a conversation starter opens the chat and sends that message immediately. Or select “Start chat” to open a new chat with the agent.
5. For more, open “Agent actions” (the three dots). “Copy agent link” copies a link that opens a chat with the agent. “Edit agent” appears for workspace-owned agents. Saving changes requires permission to manage agents.



The Explore agents page with My agents, Top picks and the search field



The details window of an agent with its starters and Start chat button

Expected result

A new chat opens with the agent selected. The agent uses its instructions and available tools. Check the model shown in the message box before sending.

Troubleshooting

Problem	What to do
An agent I made is missing from “Top picks”	Only published agents can appear there, and “Top picks” shows at most 12, so a published agent may appear in its category without appearing in “Top picks”. Open the agent, go to “Identity” and turn on “Publish in Explore agents”. Your own agents are always under “My agents”.
“Edit agent” is missing	“Edit agent” appears for workspace-owned agents, and saving changes requires permission to manage agents. Agents from other workspaces cannot be edited.
A copied agent link opens the agent list	The agent was deleted or you cannot access it.
The page is empty and says “Create your first agent”	You have no agents yet. Select “Create agent” (see “Create a custom agent”).

Switch workspaces and manage access

Purpose

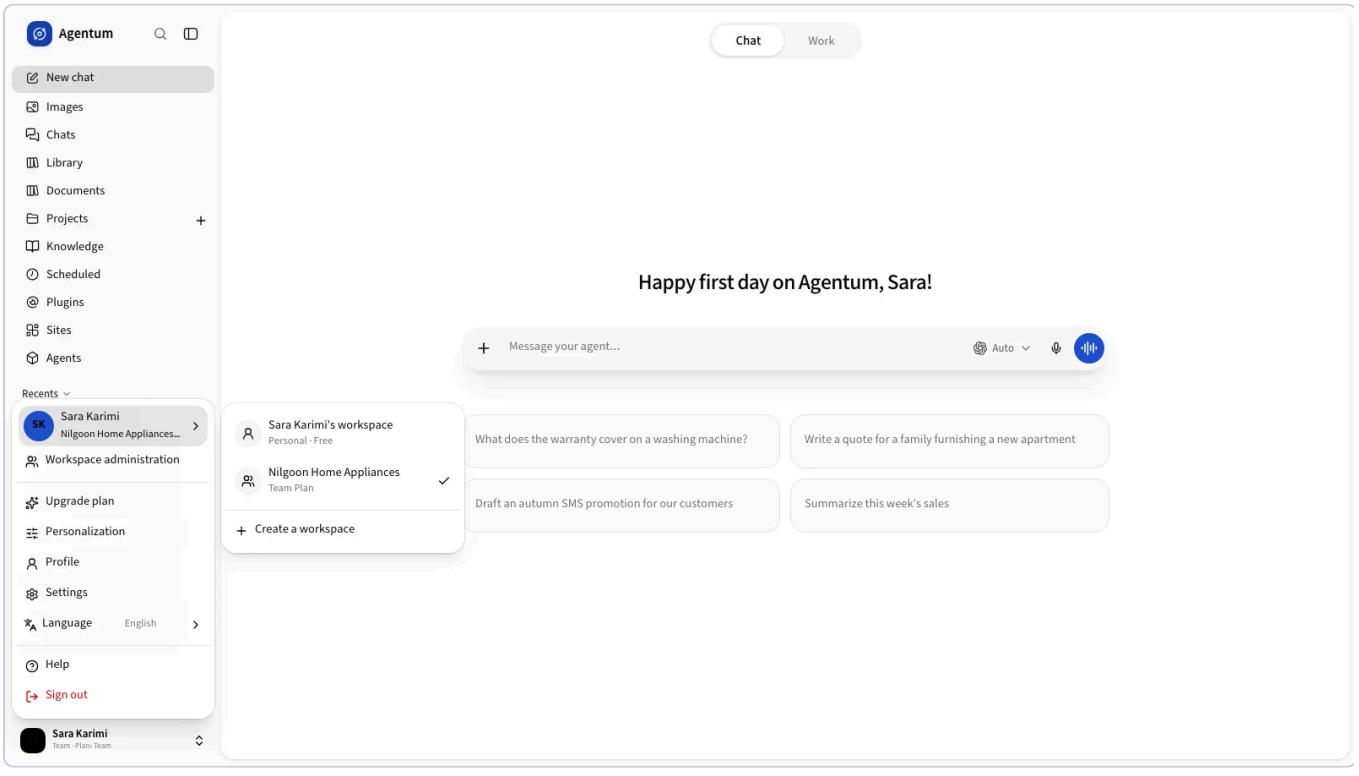
Neda has the shop’s workspace and a personal one, and she needs to be sure whose chats and files she is looking at. Here you choose the workspace you are working in, switch the interface language, and find out whether you can administer the workspace.

Before you start

You need an account with an active Seat in the workspace you want to use. Workspace administration exists only for team and organization workspaces, and only for people who can view members. A personal workspace has exactly one Seat (yours) and has no administration page.

Steps

1. Click your name at the bottom of the sidebar. Your name and the current workspace and plan appear in the first row of the menu. A “Language” row shows the current language; point to it and choose “English” or “فارسی” to change the interface language. Agentum saves the choice and reloads the page in that language.
2. Point to that row. A list of your workspaces opens, each marked Personal, Team or Organization with its plan. Choose the workspace you want. If the list is long, choose “Load more workspaces”.
3. Wait while the workspace loads, then check the name and plan in the first row before you edit chats, agents, files or billing. Shared catalogs may also show published items from outside the workspace.
4. To create another workspace, choose “Create a workspace” at the bottom of the list. It opens the pricing page for workspace plans.
5. In a team or organization workspace where you can view members, the menu also shows “Workspace administration”. Choose it, or open Settings and pick “Workspace administration” under “Workspace”. You land on the Members tab.
6. Only the tabs you may use appear: “Members” needs permission to view members, “Groups” needs permission to view groups, “Roles” needs permission to view roles, and “Policies” needs permission to manage workspace settings. Reading a tab and changing it need different permissions, so a button such as “Add member” or “Create group” is hidden when you cannot manage that area.



The workspace list in the account menu, showing a team workspace and the personal workspace

Expected result

The sidebar, chats, agents, files and billing now show the selected workspace. Your Seat there decides what you can do. A personal subscription does not give access to an organization’s workspace.

Troubleshooting

Problem	What to do
“Workspace administration” is missing from the menu and Settings	You are in a personal workspace, or you cannot view members. Switch to a team or organization workspace, or ask an Owner or Admin for access.
The page says “Workspace administration access is required.”	Your Seat cannot view members in this workspace. Ask an Owner or Admin to review your role.
A workspace you expect is not in the list	Your Seat there may be disabled or removed. Ask an Owner or Admin of that workspace to restore it.
A tab or button is missing or disabled	Your role does not include that permission, or the workspace plan does not include the feature. Ask an Owner or Admin, and do not switch workspaces to work around it.
An error appears under the list after you choose a workspace	Choose the workspace again once the connection is stable.

Chats

Neda Rahimi · Office and customer support

Monday, nine in the morning. Neda has last week's orders in a spreadsheet, a chart to make for Sara and a customer waiting for a reply.

She attaches the spreadsheet, asks for the chart, copies the reply for the customer and shares the chat with Sara. The bigger cleanup goes to Work mode. Parisa dictates a poster brief and generates the image, and Mina asks questions out loud while she cooks.

In this chapter you will learn about "Attach files to a chat", "Follow what the agent is doing", "Charts, documents and artifacts in a chat", "Copy, rate or retry a response", "Handle a failed or interrupted response", "Find and manage previous chats", "Share a saved chat", "Use Work mode", "Dictate a message", "Talk using live voice", "Generate an image", "Schedule a task" and "Use the browser extension".

Attach files to a chat

Purpose

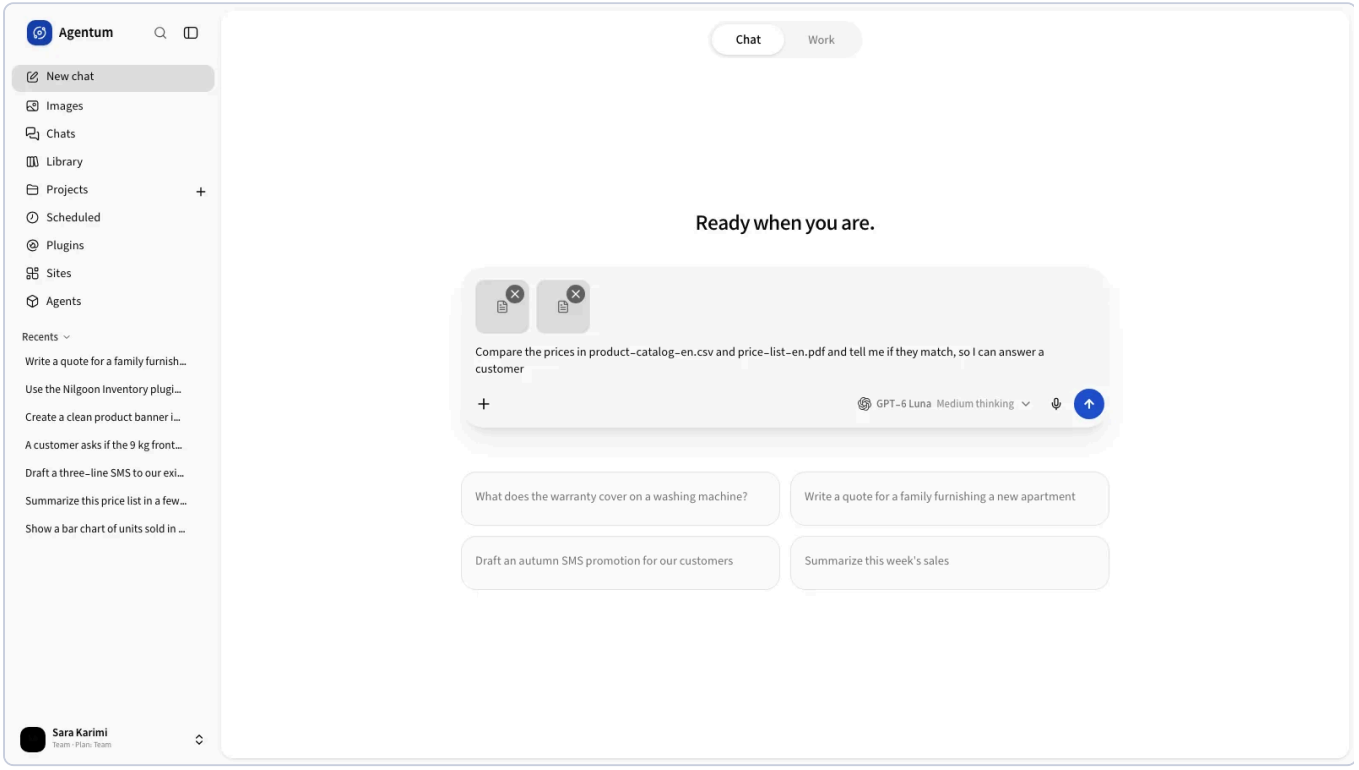
Neda has last week's orders in a spreadsheet and does not want to retype a single row. Attach it, or a photo, a document or a voice recording, to your message and the agent works from the file itself.

Before you start

Open the chat you want, or start a new one. Your plan must include file uploads, and your workspace needs free storage (see Settings, "Storage"). To have the agent look at a picture, choose a model that shows the "Vision" badge in the model list.

Steps

1. Select the plus button “Add to message” at the start of the message box, then “Add photos, files & audio” (“Upload from computer”). You can also drag files from your computer onto the page. The same menu has “Add knowledge”, which lets you pick a knowledge base to ask about.
2. Choose up to 20 files. Each file can be up to 25 MB. Audio recordings can be up to 300 MB and 2 hours long; a longer recording is refused with “Recordings can be up to 2 hours.” Automatic document reading supports files up to 5 MB and reads up to 50,000 characters, so a successful upload does not mean the whole document is read. Split larger documents into smaller files. Each file appears as a small tile above the message box with a spinner while it uploads.
3. To remove a file you do not want, or one that failed (it shows a red warning icon), select the small x on its tile (“Remove [file name]”).
4. Write your message (the text is optional when files are attached) and select “Send message”. Sending waits until every upload has finished.
5. After sending, the chat shows the progress of getting your files ready, under “File and audio activity”: “Preparing files”, “Preparing image for the model”, “Reading document”, “Transcribing audio”, and finally “Files ready”.
6. Select an attached image or file in the chat to open its preview. Use “Previous file” and “Next file” to move between the chat’s files, and “Close file preview” to leave. Audio and voice files show a player: use “Play voice message” and “Pause voice message” to play or pause, and select a position on the waveform (“Seek voice message”) to jump to it. “Show transcription” reveals the text, and “Hide transcription” hides it again. To see all the files of a chat, open its options menu (three dots) and select “View files in chat”.



A message with attached files ready to send

Expected result

The files are saved with the message and count toward your workspace storage. The agent can read supported documents, look at images when the chosen model supports images, and use the text of audio files. A recording is transcribed with speaker labels. When it finds two or more speakers, the agent first asks whether you want to tell it who they are, and you can skip that. While a recording is attached and the message box is empty, a “Summarize this voice” button appears above the box. Uploaded files also appear in the chat’s “Inputs” list in Work mode (see Use Work mode).

Troubleshooting

Problem	What to do
“You can upload up to 20 files.”	Remove some files and send the rest in a second message.
“Each file must be 25 MB or smaller, and audio recordings 300 MB or smaller.” or “This file is larger than your plan allows.”	Choose a smaller file, or compress it.
“This file type is not supported.”	Convert the file to a common format, such as PDF, a Word file, an image, plain text, Markdown, CSV or JSON. For spreadsheets, export the relevant sheet as CSV. For scanned PDFs, provide a searchable PDF or clear page images with a model that supports images.
“This workspace has used all of its storage.”	Library lets you inspect files but cannot delete them. Remove unneeded project sources from the project’s “Sources” tab, manage sites through “Sites”, or ask the workspace owner about storage capacity.
“Your current plan does not include this feature.”	File uploads are not part of your plan. See Understand plans and usage limits.
“The file could not be uploaded. Please try again.” or “The file did not upload completely. Please try again.”	Remove the file and add it again.
“The selected model cannot read images. Add a text prompt or choose a model that supports images.”	Choose a model with the “Vision” badge, or describe the image in words.
“File or audio processing failed” appears in the chat	Send the file again, or try a different format. A thumbnail alone does not mean the file was read.
“Preview is not available for this file type.”, “Could not load this file.” or “Unable to play audio. Try again.”	Download the file from the chat’s files and open it on your computer, or attach it again.

Follow what the agent is doing

Purpose

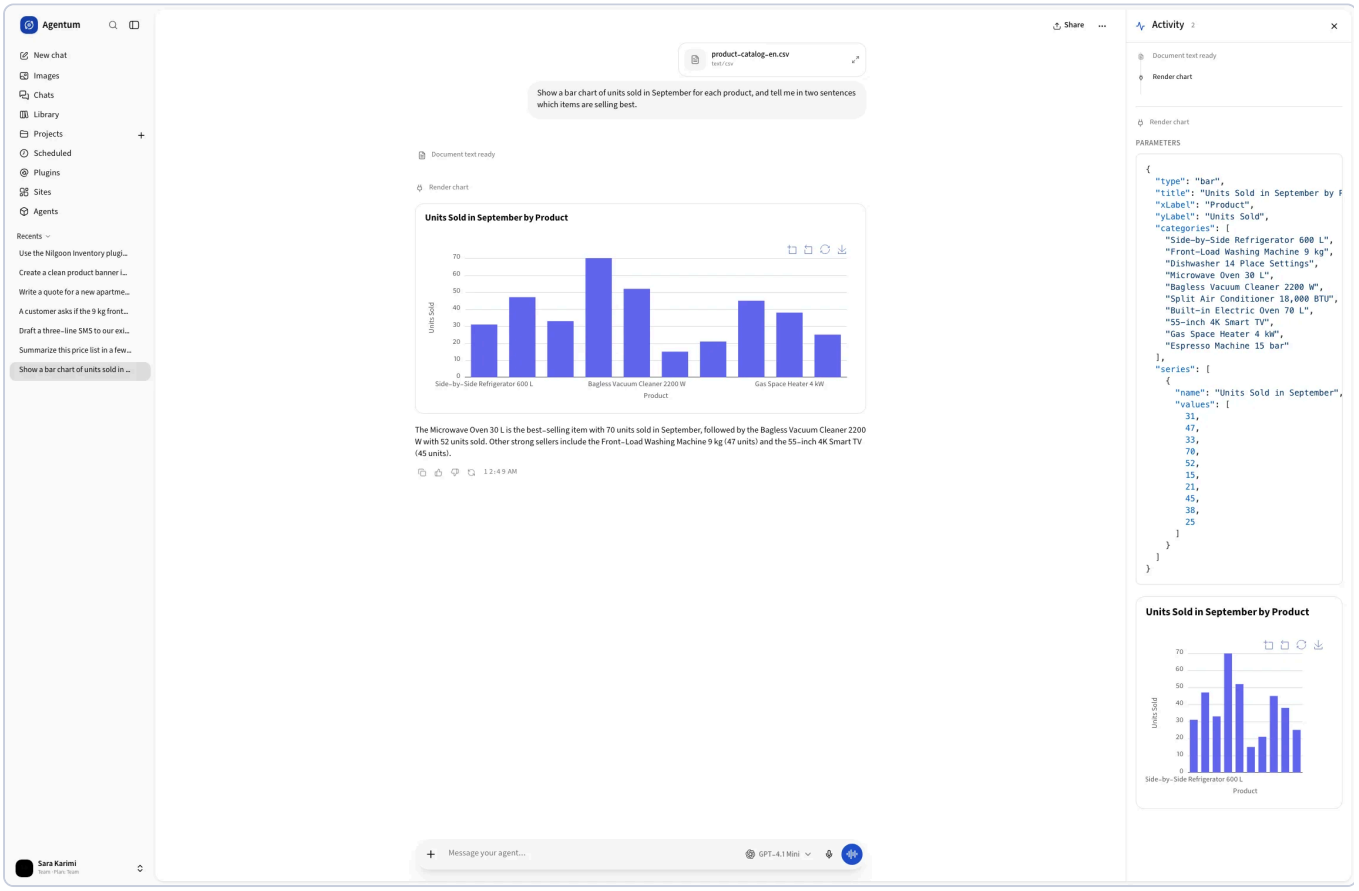
Neda is about to send Sara a figure the agent calculated, and she wants to know where it came from. Open the activity to see how the agent reached its answer and which tools it used, and approve or reject a tool before it runs when you have asked to be asked.

Before you start

Open a chat in which the agent is working or has finished. Tools such as web search, plugins and file actions only appear when the agent uses them. Whether a tool asks for your approval depends on Settings, “Plugins”, “Tool approval” (see Plugins in Settings). The default, “Always allow”, never asks in a web chat. With “Always ask”, the agent asks before every plugin tool that uses a connected account. With “Allow read actions” or “Allow low-risk actions”, it asks only for actions that do more than read.

Steps

1. While the agent works, the chat shows “Thinking…” and, when the model reasons out loud, a “Reasoning” block you can open to read. A line such as “Used 3 tools” or “2 sources” can be opened to list them. Tool lines use plain names, such as “Web search”, “Search knowledge” and the readable name of a plugin’s tool.
2. Select “View tool details” on a tool line to open the “Activity” panel. It lists, in order, every thinking step, tool call, and file or audio step of the chat. Select an entry to see its “Parameters”, then its “Result” or “Error”. The status of each tool is one of “Pending”, “Running”, “Awaiting approval”, “Responded”, “Completed”, “Error” or “Denied”.
3. You can also open the panel from the options menu (three dots) at the top of the chat by selecting “Activity”. Select “Close activity panel” to hide it.
4. When a tool needs your permission (only if “Tool approval” is not “Always allow”), the reply pauses and a card in the message, and the “Activity” panel, say “This tool needs your approval before it can continue.” Check the tool and its parameters, then select “Approve” or “Reject”. Afterwards the box says “Tool execution approved.” or “Tool execution rejected.” and the agent carries on without that tool if you rejected it.
5. In Work mode, the lines read like “Reading [file]”, “Writing [file]”, “Editing [file]”, “Searching [place]” and “Waiting for approval to write [file]”. See Use Work mode.
6. Files and voice you attach show their own steps under “File and audio activity”, for example “Preparing files” and “Transcribing audio”.



The Activity panel with a tool’s details

Expected result

You can see what the agent did and why before you rely on the answer. A tool that you rejected does not run.

Troubleshooting

Problem	What to do
The reply is stuck on “Awaiting approval”	The agent is waiting for you. Open the tool and select “Approve” or “Reject”. This is not a connection problem.
You do not want to be asked each time	Change “Tool approval” in Settings, “Plugins”. Choose “Always allow” (the default) or another looser option only for tools you trust.
“Error” appears on a tool	Select it to read the message. The agent usually tries another way. If not, rephrase your request.
“Denied” appears on a tool	The action was rejected, so it did not run. Ask again if you want it done.
“Your plan or workspace policy does not allow this plugin.”	Ask an administrator to check the workspace’s plugin policy. See Restrict workspace models, plugins and Work.
You do not recognize what a tool wants to do	Select “Reject”. Never approve an action only to make the message go away.

Charts, documents and artifacts in a chat

Purpose

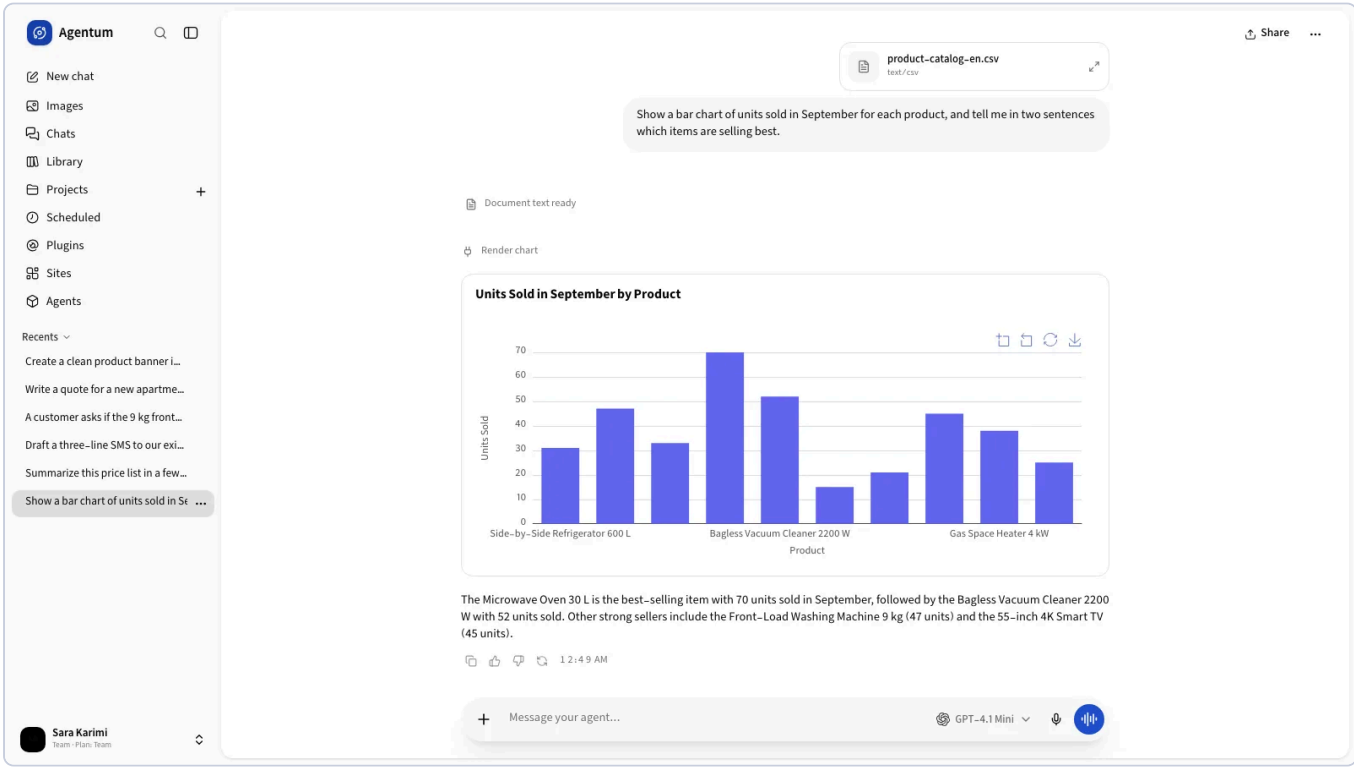
Parisa needs a one-page price list for the shop window, and Neda needs a chart for Sara’s review meeting. Ask the agent for a chart, a downloadable document or a small web page, and use the result right in the chat.

Before you start

Open a chat and describe what you want. Include the data or attach the file the agent should use (see Attach files to a chat). Images are covered in Generate an image.

Steps

1. Ask for the result, for example “Make a bar chart of monthly sales from the attached file”, “Write this as a Word document” or “Build a one-page HTML price list of our washing machines”. The tool line shows “Render chart”, “Render advanced chart” or “Create document” while the agent works.
2. A chart appears in the reply. Use “Save as image” to save a chart. Charts with axes also offer zoom controls (“Zoom”, “Undo zoom” and “Reset”). Standard charts include a data table for screen readers. While it is being prepared you see “Loading chart”, and if the data cannot be drawn the chat says “Chart data could not be displayed”.
3. A document appears as a card with the file name, the type (“PDF”, “Word document”, “Excel workbook”, “PowerPoint presentation”, “CSV” or “Markdown”), its size and, if known, the page count. Select “Download” to save it. PDF documents also have “Preview” to look at them first.
4. Longer text, a web page, a vector drawing, a diagram or code can appear as an artifact card with a title and a type (“Markdown”, “HTML”, “SVG”, “Mermaid” or “Code”). Select “Open” to show it in the “Artifacts” panel.
5. In the panel, choose “Preview” or “Source” for HTML, SVG and diagrams. “Copy” copies the content, and “Download” saves it as a file. The panel shows which version you are viewing, for example “Revision 2 of 3”; when it is not the newest, “Latest” jumps to it. Select “Close” to hide the panel.
6. To adjust a result, say what to change, for example “Make the chart a line chart” or “Add a page with the totals”. The agent makes a new version.



A chart in a reply, with its toolbar

Expected result

The chart, document or artifact stays in the chat, so you can come back to it later. Math formulas in an answer appear as typeset math instead of raw symbols.

Troubleshooting

Problem	What to do
“Chart data could not be displayed”	Ask the agent to create the chart again and check that the data is complete.
“PDF generation is unavailable. Try another document format.”	Ask for a Word document or another format instead.
“The document could not be created. Please try again.”	Send the request again, or ask for a simpler document.
“This artifact is no longer available”	Ask the agent to create it again.
“Preview is not available for this file type.”	Download the file and open it with another application.
Preview of an HTML artifact is empty	Open “Source” to see the code, or ask the agent to fix the page.
“This preview tried to open another page and was stopped. Nothing else was loaded.”	The page tried to send you to another address, so Agentum stopped it. Ask the agent to make the page without links that open other pages.
“Image from an outside site was blocked. Open it”	Agentum does not load pictures from outside sites inside an answer. Select the line to open the picture in a new tab, or ask the agent to attach the image as a file.

Copy, rate or retry a response

Purpose

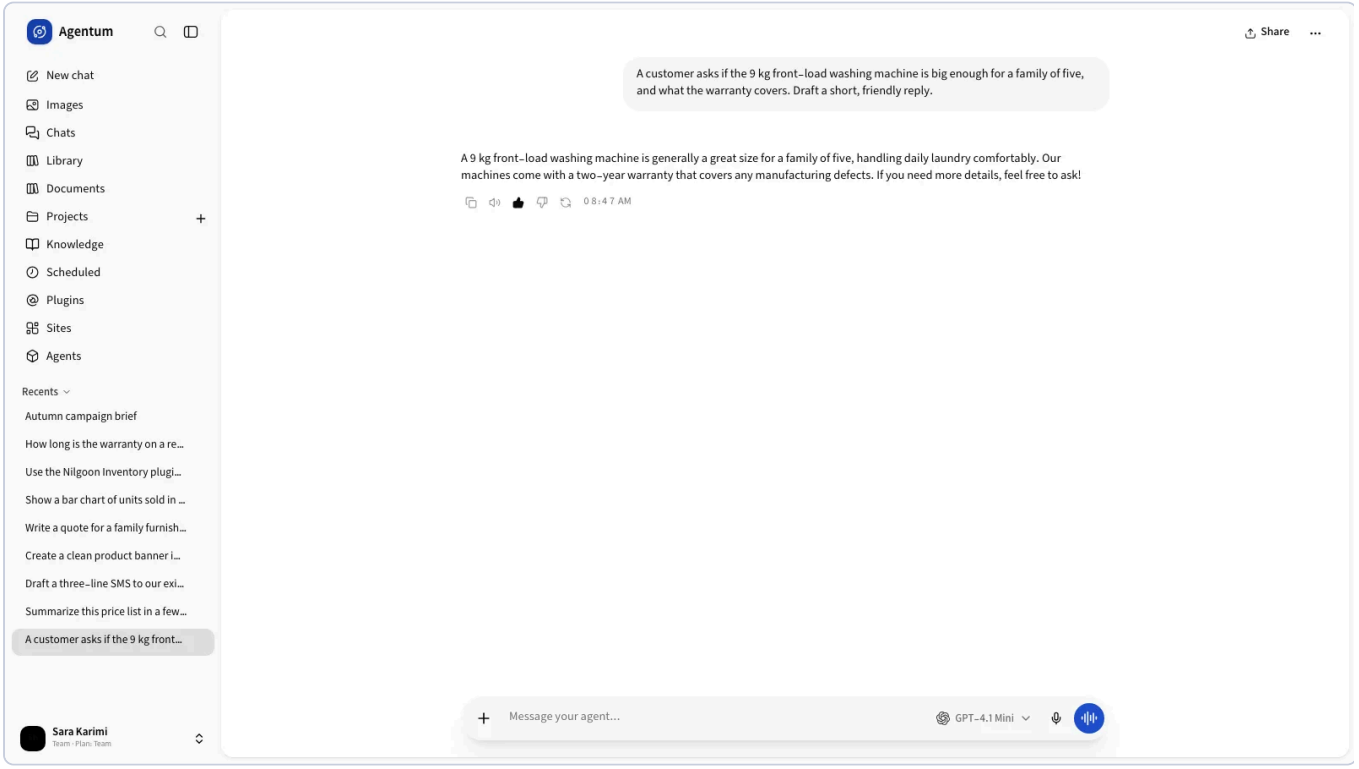
Neda asks the agent for a short autumn-sale text message for customers. Sometimes the draft is good and she wants to copy it straight out, sometimes it is weak and she wants another try. Copy an answer, have it read aloud, tell Agentum whether it was good, or ask for a new answer.

Before you start

Open a chat and wait until the reply has finished. The buttons appear when you point at a message, or when you move through it with the keyboard.

Steps

1. Point at an answer. A row of small buttons appears under it, with the time it was written: “Copy response”, “Read aloud”, “Like response”, “Dislike response” and “Try again”.
2. Select “Copy response” to copy the answer’s text. A check mark confirms the copy. The same button under your own message copies what you wrote.
3. Select “Like response” or “Dislike response” to record your opinion. Select the same button again to take your rating back. Rating works on answers that are finished and saved, so it is dimmed while an answer is still being written.
4. Select “Read aloud” to hear a finished answer. The button changes to “Stop reading” while the reply plays, and selecting it stops the audio. Only one reply plays at a time, and code, charts and tables are skipped. Your own messages do not have this button.
5. Select “Try again” to have the agent answer once more. The earlier version of that answer is replaced by the new one, and the new answer uses the model and thinking level currently selected in the message box. Spoken answers from live voice do not have this button.
6. If saving your rating fails, the message “Could not save your feedback. Please try again.” appears. Select the button again.
7. If a reply stops with the card “The agent connection failed” and a message, select “Try again” on that card. See Handle a failed or interrupted response.



The buttons under an answer

Expected result

Copying puts the text on your clipboard. Your rating is saved with the answer and a copy of the conversation context. It is not a support request and does not change the answer. “Try again” starts a new request and uses your allowance again. Reading an answer aloud also uses your allowance each time.

Troubleshooting

Problem	What to do
The buttons are not visible	Point at the message or press Tab to reach them.
“Like response” and “Dislike response” are dimmed	The answer is still being written or is not saved yet. Wait for it to finish.
Copy does not work	Your browser blocked the clipboard. Select the text and copy it with the keyboard.
“Couldn’t read this reply aloud.”	The answer holds only code, a chart or a table, or the audio failed. Select “Read aloud” again later.
“Only a finished run can be retried.”	Wait for the current reply to finish or stop it, then select “Try again”.
“The original request is no longer available, so it cannot be retried.”	Send your message again.
“Edit message” (the pencil under your own messages) is dimmed	Editing a sent message is unavailable. Send a new message containing your correction.
Retrying uses a lot of allowance	Each retry is a full new answer. Retry only when you need to.

Handle a failed or interrupted response

Purpose

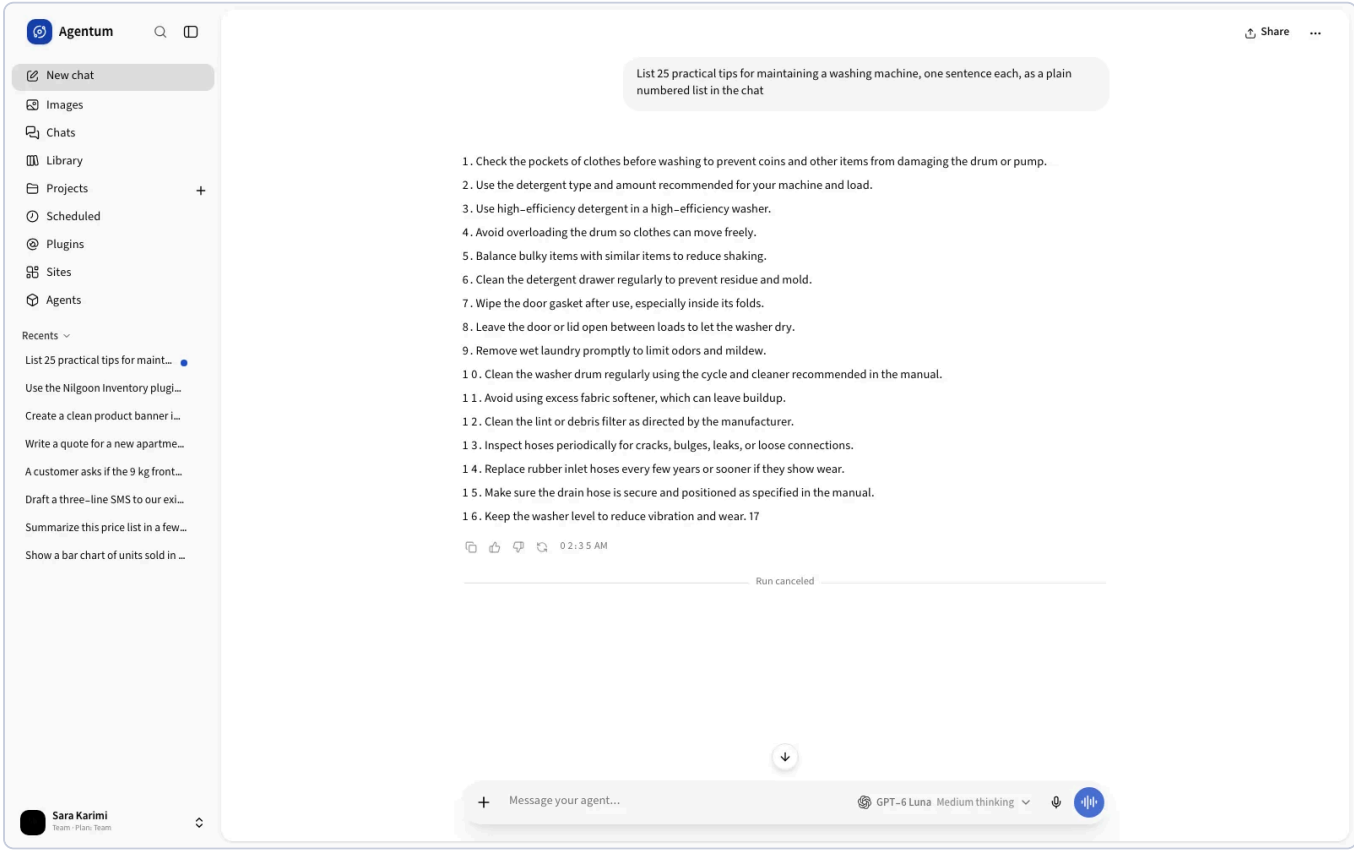
Neda’s report stops halfway because her connection dropped, and she is not sure whether to send the request again. Find out what happened to a reply that stopped, failed or never finished, and recover without sending the same request twice.

Before you start

Open the chat that has the problem, in the same workspace. If you reloaded or closed the page, reopen the chat from “Chats”: a reply that was still running keeps running and appears again.

Steps

1. Look at the chat. A spinning activity indicator next to the chat in the sidebar and “Chats” (its screen-reader label is “Running…”) means a reply is still being written. The words “Thinking…” or “Starting the agent…” mean it is working, and a tool name with the status “Running” or “Awaiting approval” means it is using a tool.
2. To stop a reply that is still running, select “Stop generation” (the square button), or press Esc while the message box has focus and the shortcut is enabled. The chat then shows “Run canceled”, and everything written so far stays.
3. If the reply failed, a red card titled “The agent connection failed” shows the reason. Select “Try again” on the card. The failed attempt is removed and a new answer starts, using the model and thinking level now selected in the message box. Your own messages and earlier answers stay.
4. If the card says the connection failed but the reply seems to be still running, wait a moment and reload the chat before retrying. A lost connection in your browser does not always stop the work on the server.
5. If a tool is waiting for you (only when “Tool approval” in Settings, “Plugins”, is not “Always allow”, the default), a card in the message says “This tool needs your approval before it can continue.” with “Approve” and “Reject”. The reply is paused, not broken. See Follow what the agent is doing.
6. If you stopped a reply by mistake, send the same message again or select “Try again” on the earlier answer.



A reply stopped with Stop generation

Expected result

You can see whether the work is still running, finished, failed or canceled, and you can choose to wait, stop, retry or answer the approval. A retry starts one new request, and it uses your allowance again.

Troubleshooting

Problem	What to do
“The agent could not start. Please try again.”	Select “Try again”. If it repeats, check your plan and usage allowance.
“The assistant could not finish its response. Please try again.”	Select “Try again”, or shorten the request or choose a different model.
“The run was interrupted. Please try again.”	Select “Try again”.
“This run has already finished.”	The reply ended just before you stopped it. Reload the chat to see the final answer.
“Only a finished run can be retried.”	Stop the running reply first, then select “Try again”.
“The original request is no longer available, so it cannot be retried.”	Send the message again.
“You have reached your usage limit. Try again after it resets.” or “You have reached your usage limit. It resets at [time].”	Wait for your allowance to reset or ask the workspace owner. See Understand plans and usage limits.
“This model is not available. Choose another model.”	Pick another model before selecting “Try again”.
Approving feels risky	Select “Reject”. Never approve an action just to make an error go away.

Find and manage previous chats

Purpose

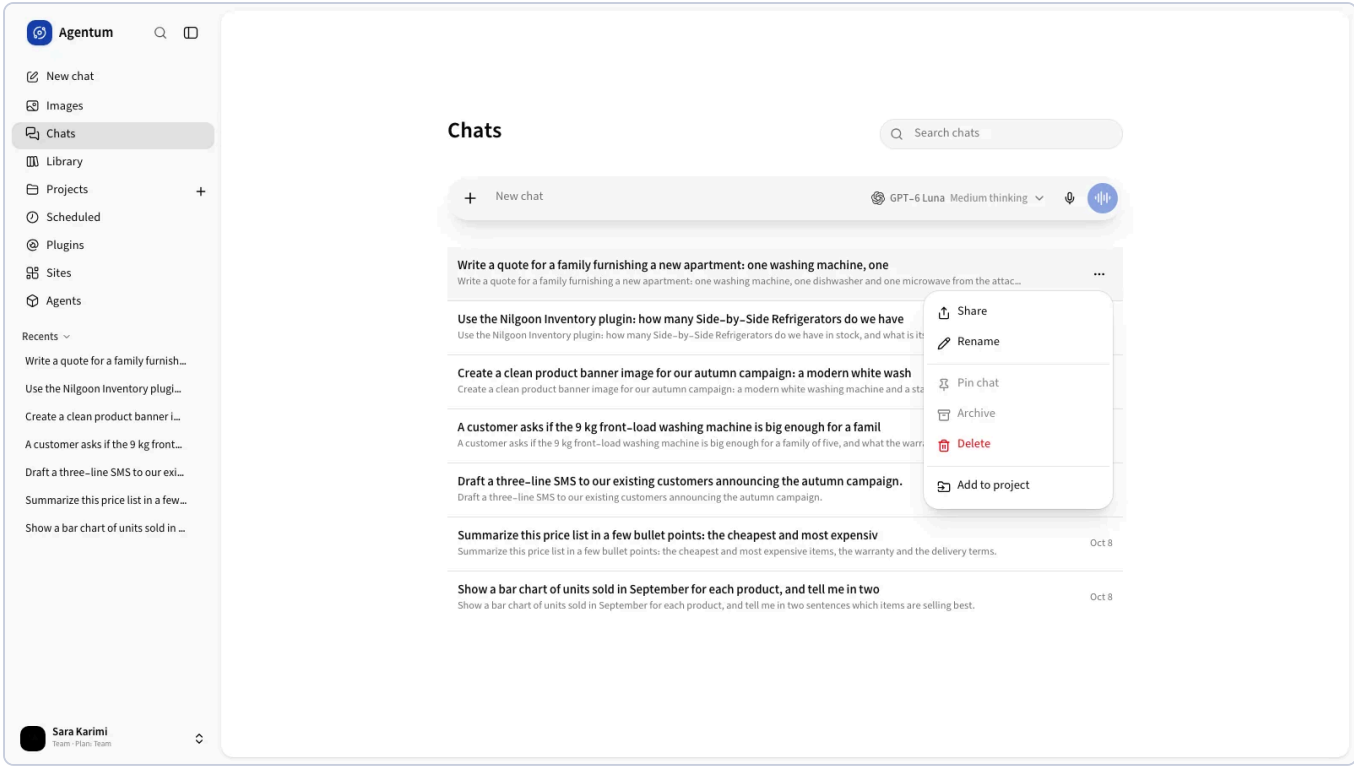
Neda remembers helping a customer with a warranty question last Tuesday, and she needs that answer again. Find a saved conversation, reopen it, and rename, move, share or delete it.

Before you start

Select the workspace that contains the conversation. Chats are kept per workspace.

Steps

1. Open “Chats” in the sidebar. The page lists your conversations, newest activity first, each with its title, the start of the first message and its date. A small dot marks a chat with unread messages, and a spinning activity indicator (its screen-reader label is “Running…”) marks a reply that is still being written. More chats load as you scroll down.
2. Type in “Search chats” at the top of the page to filter the list. Clearing the box brings back the full list. In the sidebar, “Recents” shows your latest chats, and “Search” (Ctrl+K, or Cmd+K on a Mac) opens “Search chats and projects”, which looks through chat titles and messages and project names. Select “Show all chats matching” the words you typed to open them in the full list.
3. Select a row to open the chat. Point at a row (or focus it and press Shift+F10) to reveal its options button, “Options for [chat title]”.
4. In the options menu:
   - “Share”: opens the link dialog described in Share a saved chat.
   - “Rename”: opens “Rename chat”. Type a name in “Chat name” (up to 120 characters) and select “Save”.
   - “Add to project” or “Move to project”: opens a dialog where you pick a project from “Choose a project” and select “Save”. “Remove from project” takes the chat out of its project.
   - “Delete”: opens “Delete chat?”. Select “Delete chat” to remove the chat and its saved short-term memory for good, or “Cancel” to keep it.
5. You can also manage a chat from inside it. Select the three-dot options button at the top of the chat for “Rename chat”, “Move to project”, “Remove from project” and “Delete chat”. In the sidebar, the “Conversation actions” button on a row in “Recents” offers “Share”, “Rename”, “Move to project” and “Delete”. Moving to a project is unavailable for Work chats.
6. In a long chat (more than four of your own messages), point at the marks along the page edge to see the list “User messages”. Select one to jump to that message.



The Chats page with a chat’s options menu open

Expected result

The chat opens with its full history. Renaming or moving a chat does not start a new reply. Deleting a chat cannot be undone.

Troubleshooting

Problem	What to do
The list does not load	Select “Retry”. If it still fails, reload the page.
Search shows nothing	The message “No chats or projects match” means there is no match. Try a shorter or different word, or clear the box.
“Move to project” or “Add to project” is dimmed	You have no active projects yet. Create one in “Projects”.
“A Work conversation’s project cannot change. Start a new conversation in the project you want.”	Chats started in Work mode stay in the project they began in.
“A site’s conversation stays with its site. To remove it, delete the site from Sites.”	A chat that builds a site is deleted together with the site, from “Sites”.
“Pin chat” and “Archive” are dimmed	These two menu items are unavailable.
A rename or delete fails	Read the message in the dialog and try again. The dialog stays open so you do not lose your text.

Share a saved chat

Purpose

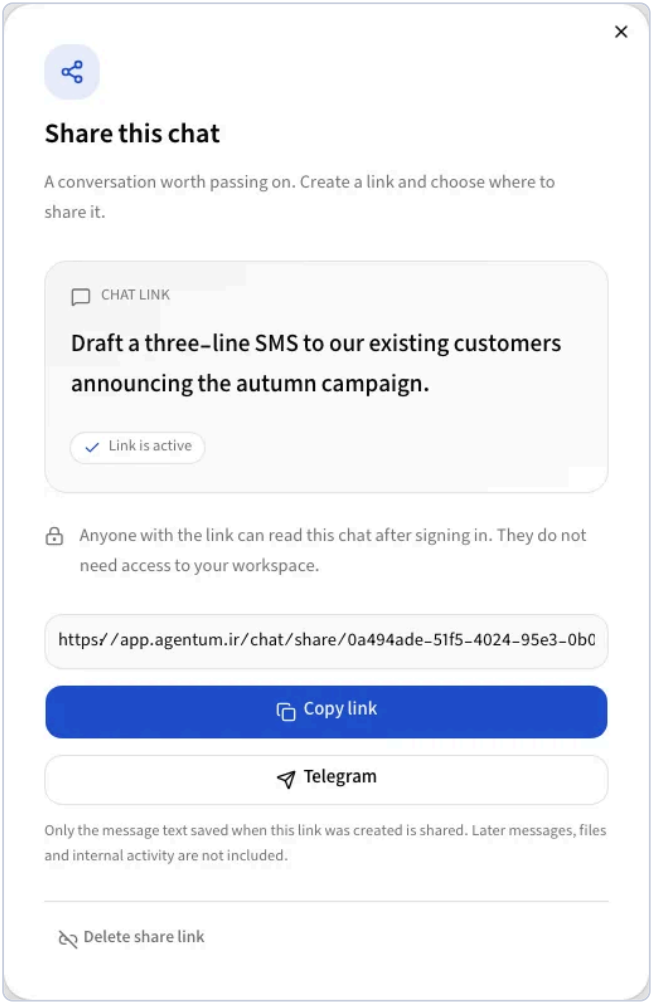
Neda wants Sara to see exactly how the agent reached last week’s figures, without copying and pasting the whole chat. Create a read-only link to a chat so someone else can read it, and delete the link when you no longer want it shared.

Before you start

Open a chat that already has messages and read it through. The link shows the text of the chat as it is when you create the link, so do not share chats that hold private details. The people you send it to need an Agentum account.

Steps

1. Open the chat and select “Share” in the top bar, or open “Chats”, point at the chat, select its options button and then “Share”. The dialog “Share this chat” opens. Wait until “Loading link…” disappears.
2. Select “Create share link”. The dialog now says “Link is active” and shows the link in a box.
3. Select “Copy link” to copy it (the button briefly says “Link copied”). To send it through Telegram, select the Telegram button. If your browser supports it, “Share to apps” opens your device’s sharing menu.
4. Send the link to the person. They are asked to sign in, and then they see the page “Shared conversation” marked “Read only · Sign-in required”, with the messages from you and from the assistant, and a “Start your own chat” button. They do not need to belong to your workspace.
5. To stop sharing, select “Delete share link”. A question appears: “Delete this link? It will stop working immediately. Your chat stays in your account.” Select “Delete share link” again to confirm, or “Cancel” to keep the link.



The share dialog with an active link

Expected result

Anyone who has the link and is signed in can read the saved text of the chat. Messages written later, files, and the agent’s internal activity are not included. Deleting the link makes it stop working right away and leaves your own chat untouched. Chats that build a site cannot be shared.

Troubleshooting

Problem	What to do
The dialog shows an error	Select “Try again”. The message reads “Could not update the share link. Please try again.”
“Could not copy automatically. Select the link above and copy it.”	Click in the link box and copy it with the keyboard.
“Sharing is unavailable. Copy the link instead.”	Your browser has no device sharing menu. Use “Copy link”.
The person sees “This link is unavailable”	You deleted the link, or the chat is no longer shared. Create a new link and send it.
The person sees a sign-in page	This is expected. They need to sign in to Agentum first.
The chat changed after you shared it	The link keeps showing what was saved at the time. Delete the link and create a new one to share the latest messages.

Use Work mode

Purpose

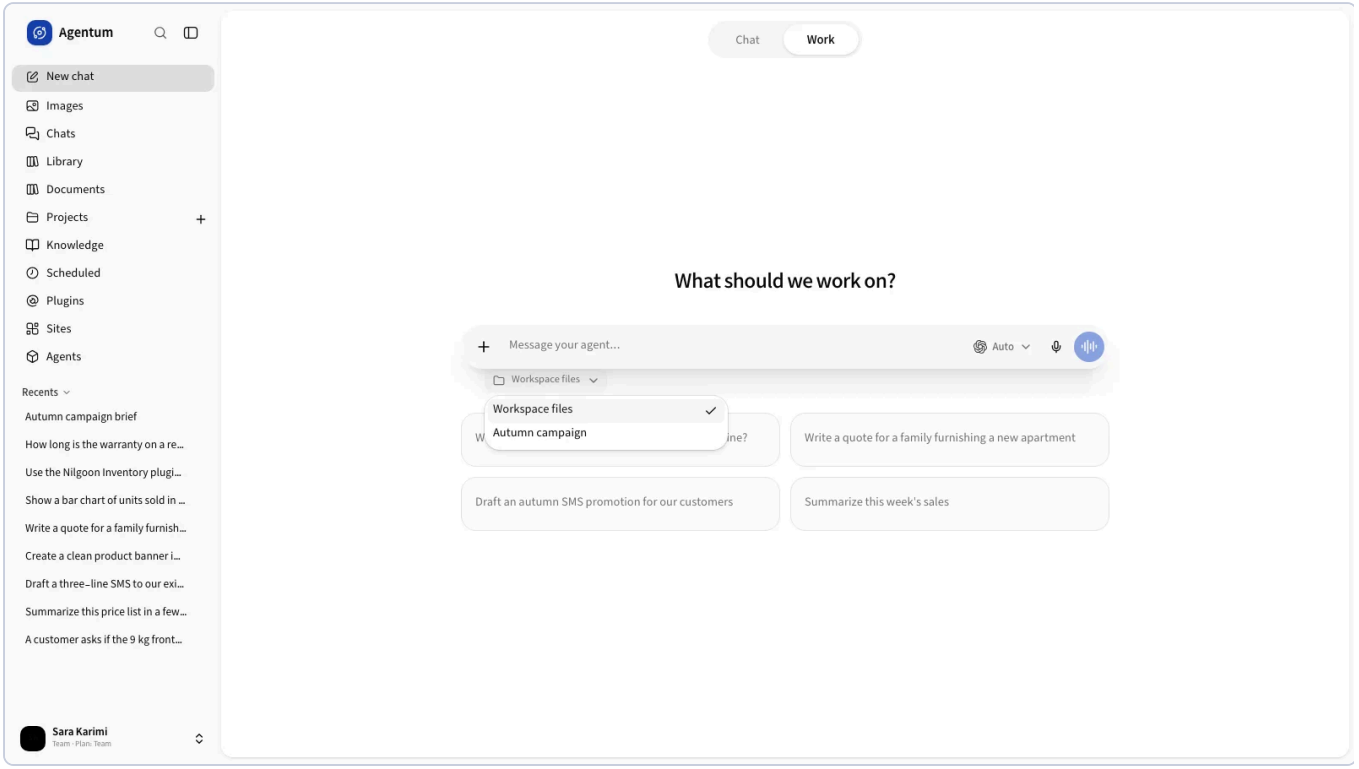
Some Monday jobs are too big for one answer: last week’s orders to clean up, a report to build, a summary to write. Choose between a normal chat and Work mode, where the agent takes on bigger jobs: it plans the steps, reads and writes files, and hands parts of the job to helpers.

Before you start

Open a new chat with the default agent. The switch only exists on that page: chats with a custom agent, and chats you have already started, keep their mode. Your plan must include Work (see Understand plans and usage limits), your workspace policy must allow it (see Restrict workspace models, plugins and Work), and you need a model that can use tools.

Steps

1. At the top of a new chat, choose “Chat” or “Work” on the switch labeled “Conversation mode”. In Work, the heading above the box changes to “What should we work on?”.
2. In Work, a project bar under the message box shows “Workspace files” or the chosen project. Open it and choose a project to work in, or leave “Workspace files” to work with your general workspace files.
3. Open the model button. In Work it only offers models that can use tools. If your current model cannot, it switches to one that can. See Choose a chat model and thinking level.
4. Write your task, attach files if needed, and select “Send message”. The switch and the project bar are locked while the chat is being created, and the chat keeps its mode and project from then on.
5. While the agent works, the chat shows what it is doing, such as “Reading [file]”, “Writing [file]”, “Editing [file]” and “Searching [place]”. Approve actions that ask for it. See Follow what the agent is doing.
6. Open the files panel with the panel button at the top right of the chat, or “View files in chat” in the options menu. “Outputs” lists the files the agent created and “Inputs” lists the files you attached. Select a file to preview it, use “Download file” to save it, and “Refresh files” to update the lists. “Close files panel” hides it.



A new chat in Work mode with the project selector

Expected result

The new chat uses the mode and project you chose. In Work the agent can create files that you find under “Outputs”. Choosing a project does not share it with anyone and does not bypass your workspace permissions. Some features belong to Chat only: live voice and the browser extension’s tools are not available in Work.

Troubleshooting

Problem	What to do
There is no “Chat” and “Work” switch	You are in a saved chat or with a custom agent. Open a new chat with the default agent from “New chat”.
A model disappeared after selecting “Work”	It cannot use tools. Pick another one, marked “Tools”.
“This model cannot use tools, which Work needs. Choose a model that supports tools.”	Choose a model with the “Tools” badge.
“Work is available only with the default agent.”	Start the Work chat from “New chat”, not from a custom agent.
“A Work conversation’s project cannot change. Start a new conversation in the project you want.”	Start a new Work chat in that project.
“This Work conversation’s project is no longer available.”	The project was removed. Start a new chat.
“Your current plan does not include this feature.”	Work is not part of your plan. See Understand plans and usage limits.
“Your workspace policy does not allow this kind of request.”	A workspace administrator has turned Work off. Ask them to turn on “Work enabled”.
“Could not load files. Try refreshing.”	Select “Refresh files”.

Dictate a message

Purpose

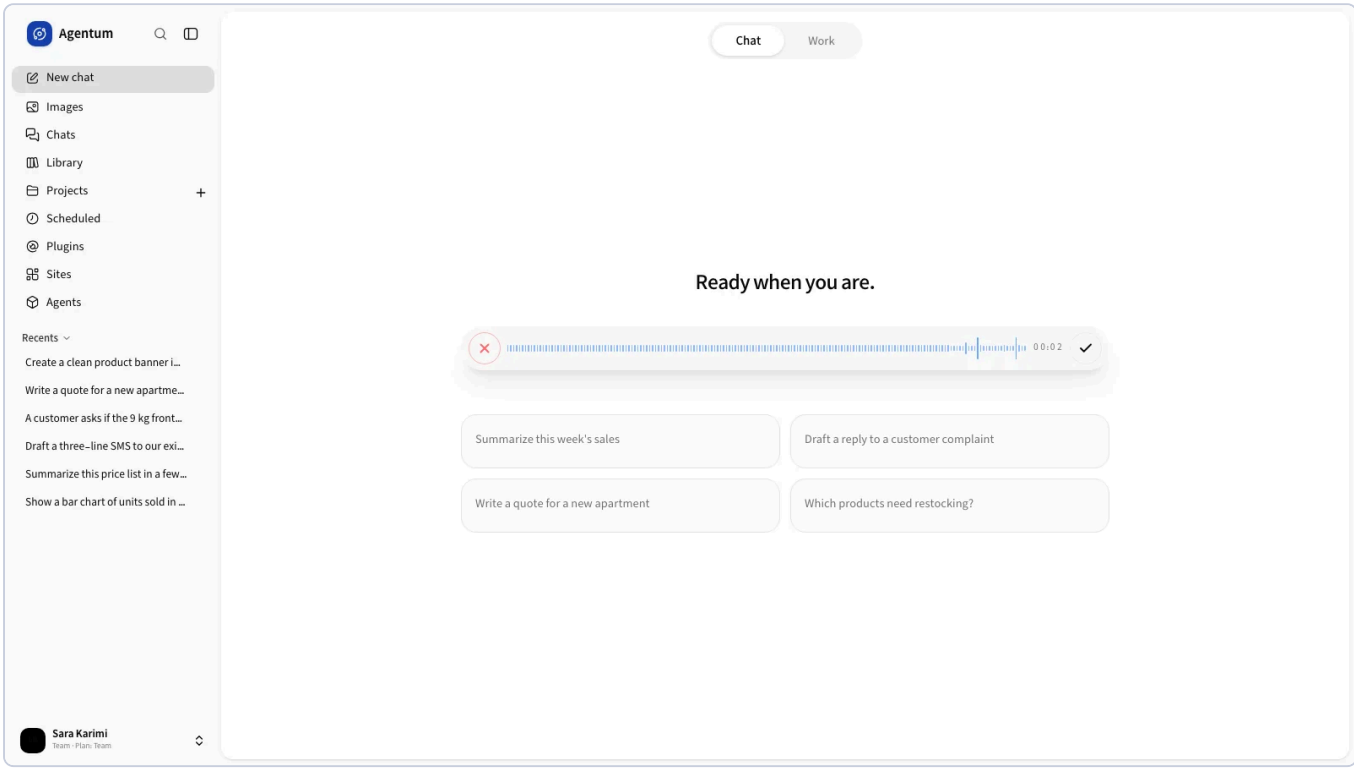
Parisa has a long brief in her head and her hands full of sketches, so typing it would take longer than saying it. Speak your message and have it typed into the message box, ready to edit and send.

Before you start

Use a browser that can record from the microphone and allow microphone access when the browser asks. Dictation only types text for you. It is different from Talk using live voice, where the agent answers by voice. Dictation uses your usage allowance even if you do not send the resulting text.

Steps

1. In the message box, select the microphone button (“Dictate”). It sits next to the model button. The box switches to a recording bar with a moving sound wave and a timer.
2. Speak. To throw the recording away, select the red x (“Cancel dictation”).
3. When you finish, select the check button (“Finish dictation”). While your words are turned into text, the check button becomes a spinner and the sound wave fades. A recording stops by itself after 2 hours and is then transcribed, so you can dictate the rest afterwards. In the last 5 minutes the bar shows “[time] left”, and it turns red in the last 30 seconds.
4. The text appears at the end of what you had already typed, and the cursor waits at its end. Read it, fix any names or numbers, then send it with “Send message”. Nothing is sent automatically, and the recording is neither attached to the message nor kept.
5. If the text could not be created, a message appears and the bar offers “Try again”, which sends the same recording once more without recording again. Select “Cancel dictation” to give up and type instead.



The message box while recording a dictation

Expected result

Your spoken words are in the message box as normal text. The conversation is not touched until you press send.

Troubleshooting

Problem	What to do
“Dictation is not supported in this browser.”	Update your browser or open Agentum in another current browser.
“Microphone access was not granted.”	Allow the microphone for this site in your browser’s address bar settings, then try again.
“No speech was detected.”	Speak closer to the microphone, check that it is not muted, and record again.
“The voice message could not be transcribed. Please try again or type your message.”	Select “Try again”. If it keeps failing, type your message.
The spinner keeps turning for a long time	Wait, or select “Cancel dictation” and record a shorter message.
Transcription is blocked by your plan or usage limit	If your plan or usage limit blocks transcription, type the message instead or wait for the allowance to reset. See Understand plans and usage limits.
Names or numbers are wrong	Dictation can mishear them. Always read the text before sending.

Talk using live voice

Purpose

Mina is cooking with flour on her hands and cannot type, but she still wants to know how much rice to cook for five. Talk to the agent out loud and hear it answer. Your words and its replies are also saved in the chat as text.

Before you start

Use a browser that can record and play sound, and allow microphone access when asked. Live voice is available in Chat mode with the default agent or a custom agent, provided an allowed voice model is available. It is unavailable in Work mode. To change the voice or how the text appears, see Voice settings.

Steps

1. In an empty message box, select the round button “Live voice chat” at the end of the box. It takes the place of “Send message” while there is no text or file in the box. Wait while the bar says “Connecting…”.
2. When the bar says “Start talking”, speak. The bar shows what is happening: “Listening…” while it hears you, “Thinking…” while it prepares an answer, “Using tools…” while it uses a built-in tool such as web search, and “Speaking” while it answers. Connected plugin tools are not offered in live voice, because voice cannot ask for your approval. The voice model’s name is shown under the status.
3. To interrupt a reply, just start talking. The saved text of an interrupted reply contains only what you actually heard.
4. Select the microphone button (“Mute microphone”) to stop sending your voice, for example when you step away. The bar says “Microphone off”. Select it again (“Unmute microphone”) to continue.
5. To finish, select the x button (“End voice mode”). The message box comes back, and the chat shows the whole conversation as messages. A new chat is created on your first spoken message and appears in “Chats”.

Expected result

The chat contains what you said and what the agent answered, in order, and you can keep typing in the same chat afterwards. Spoken replies do not have a “Try again” button. The voice session uses its own voice model, which can differ from the model you picked for typed messages.

Troubleshooting

Problem	What to do
“Microphone access was not granted.”	Allow the microphone for this site in your browser, then select “Live voice chat” again.
“Dictation is not supported in this browser.”	The browser cannot record. Use a different, up-to-date browser.
The “Live voice chat” button is missing or dimmed	Clear the message text and remove attachments, wait for uploads and the current response to finish, and use Chat mode. The button is disabled in Work mode.
“Voice mode is not available right now. Try again later or type your message.”	Wait a little and try again, or type your message.
“The voice connection was lost. Start voice mode again to continue.”	Select “Live voice chat” again. What was said before is already saved in the chat.
“The voice provider blocked this response. You can continue by typing in this chat.”	Rephrase your request by typing it.
The session ends by itself after 2 hours	In the last 5 minutes the bar shows “[time] left”, and it turns red in the last 30 seconds. Then the chat says “Voice mode ended because it reached its limit of 2 hours. Start voice mode again to continue.” Select “Live voice chat” to start again.
The session ends because your allowance is used up	If your usage allowance is exhausted, wait for it to reset or review the plan. Starting again cannot bypass an exhausted allowance. See Understand plans and usage limits.
It does not seem to hear you	Check that the bar does not say “Microphone off” and that the right microphone is selected in your browser.

Generate an image

Purpose

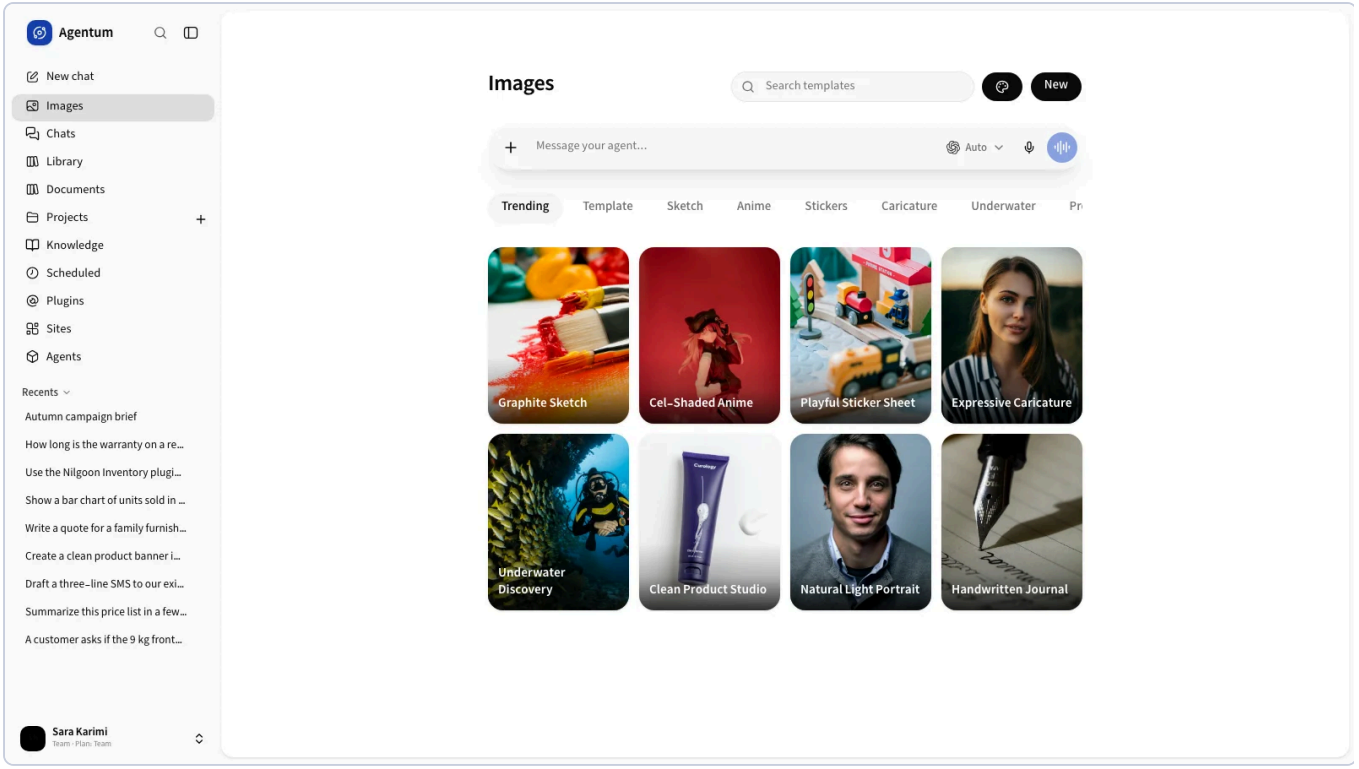
Parisa wants a first poster idea for the autumn sale in minutes, not hours. Create or edit pictures by describing them, starting from a ready-made prompt template, a quick sketch or your own words.

Before you start

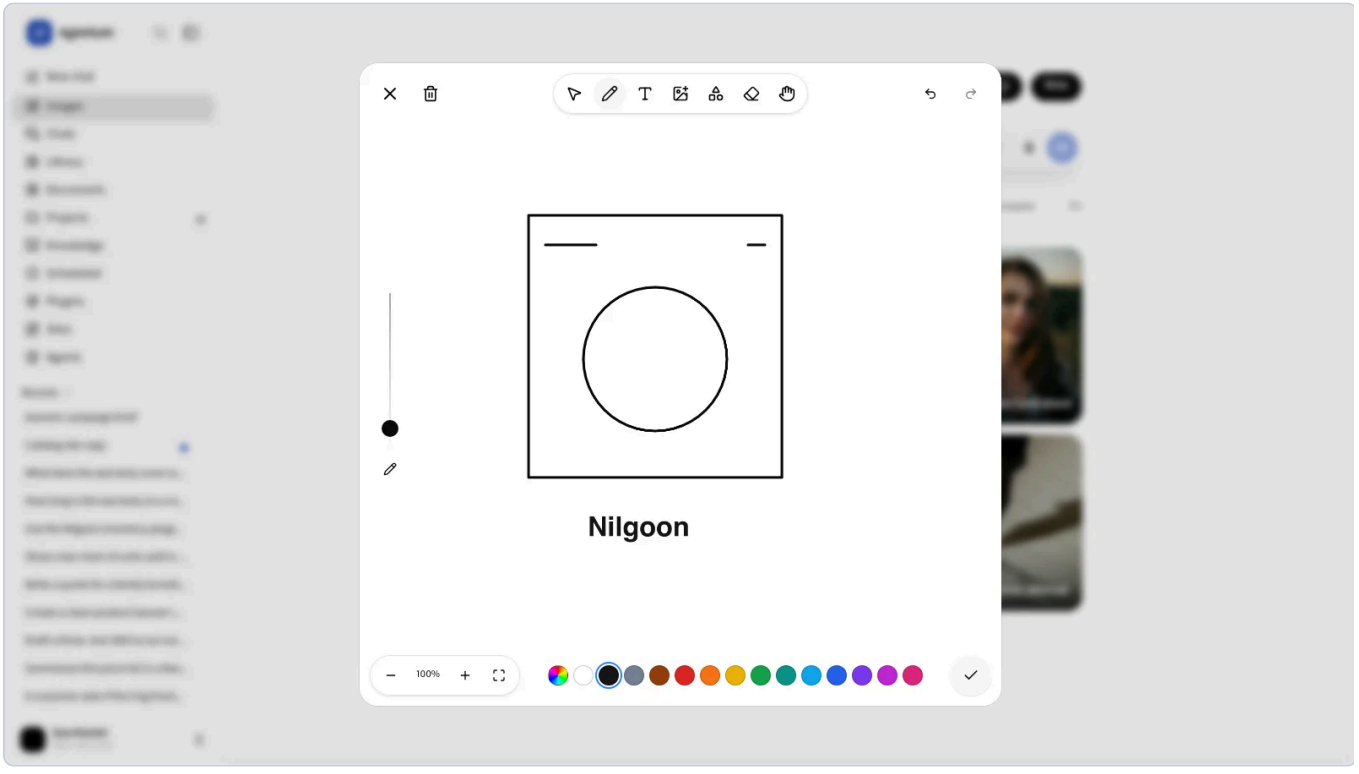
Choose the workspace you want to work in. Image creation needs an image model that your plan allows. Settings, “Models” shows the default image model under “Image generation”; “Automatic” follows the model you chat with.

Steps

1. Open “Images” in the sidebar. At the top there is a message box, a search box (“Search templates”), a “New” button, a “Draw” button, a row of categories (“Image template categories”, for example “Trending”, “Sketch”, “Anime”, “Product photo”) and a grid of template pictures.
2. Pick a category, or type in “Search templates”. Clearing the search brings the full category back. More templates load as you scroll.
3. Select a template. Its prompt is copied into the message box above so you can read and change it. Nothing is generated yet.
4. Edit the prompt if you wish, and attach a picture with “Add to message” if you want it edited or used as a reference. To sketch your own starting point instead, select “Draw” next to “New”. The “Drawing canvas” offers “Pencil”, “Text”, “Shapes” (line, arrow, rectangle, ellipse, triangle, diamond, star and heart), “Eraser”, “Move text” and “Pan canvas”, plus “Undo”, “Redo”, colors, sizes, zoom, “Upload image” and “Clear canvas”. Select “Add to message box” and the drawing becomes an image attached to your message. It stays in your browser until you add it. Select “Send message”. A new chat opens and the agent creates the picture. You can also skip templates and describe the picture straight in any chat, for example “Draw a poster for our autumn washing machine sale”.
5. In the chat, the picture first shows as “Creating image”, then as “Image created”. Select the picture to see it larger, or the download button in its corner (“Download”) to save it. Select “Image created” to open its activity details, where “Model: [name]” says which image model made it. One request can produce up to four pictures. To change the result, reply with what to adjust and the agent makes a new version.
6. To save your own template, select “New”. In “New image template” fill in “Name” (up to 120 characters) and “Prompt” (up to 12,000 characters). “Preview image URL (optional)” takes the complete HTTP or HTTPS web address of a sample picture; it is only the thumbnail of your template and does not generate anything. Select “Create template”. The template is saved for your workspace and the page opens its category. “Cancel” closes the dialog without saving.



The Images page with templates



The drawing canvas on the Images page

Expected result

Sending opens a chat where the agent creates the image and shows it in the conversation. The prompt of a template you picked is only a starting point, and a template’s preview picture is not the result of your request. Saved templates stay in your workspace for later use.

Troubleshooting

Problem	What to do
“No templates match your search.”	Use fewer words or clear the search.
“No image templates in this category yet.”	Pick another category.
The agent answers with text and does not draw	Choose a chat model with the “Tools” badge and explicitly ask it to generate the image. If it still cannot, check the image model in Settings, “Models”, and the agent’s configuration.
“The media service is busy. Please try again shortly.”	Wait a moment and send the request again.
“Enter a name and a prompt. The preview must be a web address.”	Fill in both fields, and make sure the optional preview address is a complete HTTP or HTTPS web address.
“The selected model cannot read images. Add a text prompt or choose a model that supports images.”	You attached a picture to a model that cannot read pictures. Pick a model with the “Vision” badge.
“Your current plan does not include this feature.”, “You have reached your usage limit. Try again after it resets.” or “You have reached your usage limit. It resets at [time].”	See Understand plans and usage limits.

Schedule a task

Purpose

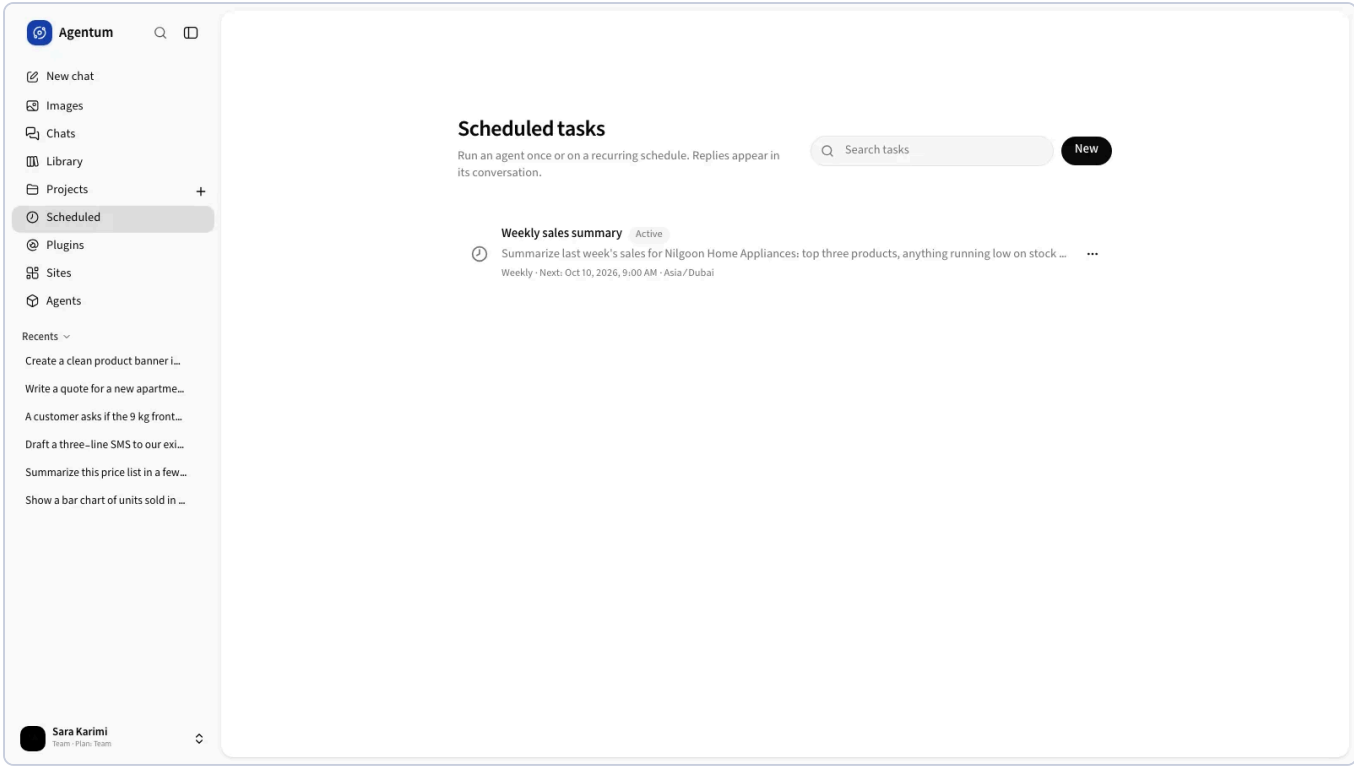
Neda’s weekly report used to eat her Saturday morning. Have the agent run a prompt once, or again and again, at a time you choose, and find the finished result waiting in a chat.

Before you start

Choose the workspace you want. A scheduled task sends its prompt to your default agent, so the agent, your plan and your usage allowance apply to every run, just like a message you type.

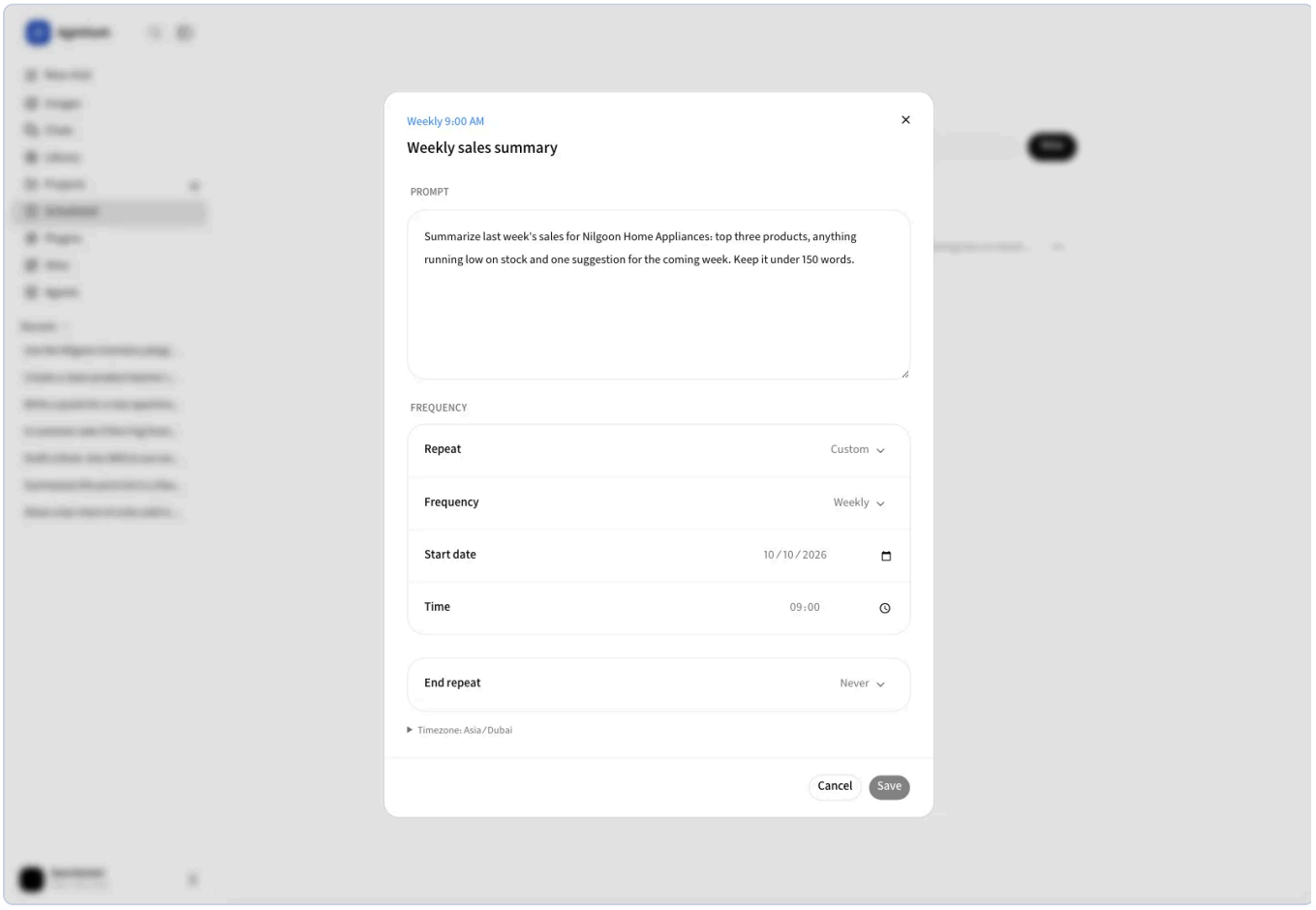
Steps

1. Open “Scheduled” in the sidebar. The page “Scheduled tasks” lists your tasks. “Search tasks” filters them by name or prompt. Select “New”.
2. Type a “Name” (up to 120 characters) and the “Prompt” (up to 12,000 characters): what the agent should do each time. The blue line at the top of the form summarizes the schedule, for example “Daily 8:00 AM”.
3. Under “Frequency”, set “Repeat”. “Does not repeat” runs the task once. “Custom” lets you pick a “Frequency”: “Daily”, “Weekly” or “Monthly”. A new task starts as daily at 8:00 AM.
4. Set the “Time”, and for one-time, weekly and monthly tasks the “Start date”. A weekly task repeats on the weekday of its start date. A monthly task repeats on the day of its start date, and in shorter months it runs on the last day of the month.
5. For a repeating task, “End repeat” is “Never” or “On date”. With “On date” choose the “End date”. The task still runs on that day.
6. Open the line “Timezone” to see or change the time zone, which starts as the one your device uses. Type or pick a zone such as UTC or Europe/London. For a daily task, the “Start date” is inside this section too. All times follow the zone you set. When daylight saving skips an hour the run moves forward, and when it repeats an hour the task runs once.
7. Select “Save”. The task appears in the list with a label (“Active” or “Paused”), its prompt, how often it runs, “Next: [date and time]” (or “Last: [date and time]” when nothing more is scheduled) and its time zone. If the last run failed, the reason is shown in red.
8. After the first execution creates a conversation, select the task row to read its replies. Before then, use the options button (“Options for [task name]”) to edit, pause or delete it. The options button offers “Edit task”, “Pause” or “Enable”, and “Delete”.
9. To delete, select “Delete”, read “Delete scheduled task?” and confirm with “Delete”, or select “Cancel” to keep the task.



The list of scheduled tasks

The form below shows the “Weekly sales summary” task being edited with “Edit task”. “Save” stays unavailable until you change something.



The form for editing the weekly sales summary task

Expected result

At each scheduled time the default agent runs the prompt and the answer appears in the task’s conversation. Editing a task changes its name, prompt and schedule, not its conversation. A task that runs once shows the result of that run (“Completed” or “Failed”) in place of “Active” afterwards. “Pause” stops future runs until you select “Enable”. Deleting stops future runs; work already queued or running finishes, and the conversation stays in your chats.

Troubleshooting

Problem	What to do
“Save” is dimmed	The name or prompt is empty, or you have not changed anything since opening it.
“Choose a valid date, time and time zone.”	Check the date and time, and type a real time zone name, such as Asia/Dubai.
“This schedule has no future run. Check its start and end dates.”	The start date is in the past for a one-time task, or the end date has passed. Choose later dates.
“The end date must be on or after the start date.”	Pick an end date that is the start date or later.
“Only repeating tasks can have an end date.”	Set “Repeat” to “Custom”, or set “End repeat” to “Never”.
“The schedule was changed at the same time. Please try again.”	Reopen the task and save again.
The task shows a red error under it	Read the error under the task and correct its cause, such as the usage limit, or “This scheduled task needs your approval to use a plugin tool. Run it from the chat to approve.” (a task cannot ask for approval, so run it from a chat, or set Settings, “Plugins”, “Tool approval” to “Always allow”). A repeating task tries again only if another run is scheduled. For a one-time or ended task, choose a future schedule and enable it.
“No tasks found”	Clear the search box or try another word.
The list will not load	Select “Try again”.

Use the browser extension

Purpose

Mina is reading a long article about school lunch ideas and keeps switching tabs to ask questions about it. Chat with your default agent in a side panel next to any web page, and, only when you choose, let it read that page or click and type on it.

Before you start

Install the Agentum extension in Google Chrome 116 or newer and have an Agentum account (see Sign in and create your account). The side panel follows the language of your account. Browser tools work only in Chat mode with the default agent.

Steps

1. Click the Agentum icon in the browser toolbar (“Open Agentum”). The side panel opens. A label at its top shows the connection: “Not connected”, “Connecting…”, “Connected”, “Reconnecting…” or “Disconnected”.
2. If you are not signed in, the panel says “Your Agent, in your browser”. Select “Sign in to Platform” to open the Agentum sign-in page in a new tab and sign in. Back in the panel, select “Connect after sign in”.
3. Once connected, the panel shows the agent’s name (“Default Agent”), your name and seat, and “Sign out”.
4. The row below says “Browser access is off”. Nothing on any page is visible to the agent yet. To let it see a page, open that web page, click the toolbar icon on that page, then select “Share page” in the panel. The row then says “Page shared” with the page title and address. Pages of Agentum itself and non-web pages cannot be shared.
5. Type your request in “Ask your Agent…” and select “Send”. Each message can contain up to 12,000 characters. Split longer requests into separate messages. Below the box, “Browser tools available” means a page is shared, and “Chat only” means it is not. Select “Stop” to cancel a running reply, and “New conversation” to start fresh. If the connection drops, select “Reconnect”.
6. When the agent wants to act on the page, the panel asks “Allow this browser action?” Sharing permits the agent to read the page’s title, address and contents without another prompt. Clicking, typing and scrolling each require “Allow once” or “Deny”. The prompt shows the action (“Click”, “Type text” or “Scroll”), its target, the page title and address, and any text it wants to type. Read it, then choose. Clicks can submit forms, send messages or make purchases.
7. To take the page back, select “Revoke” in the sharing row. Closing the shared tab also ends sharing. “Sign out” revokes browser access and signs out the shared Agentum session, including the web app in that browser.

Expected result

Only the one page you shared is available to the agent. Sharing a page lets the agent read it; clicking, typing and scrolling still need your approval each time. While the agent works, the panel shows lines such as “Agent is using a tool…”, “Interacting with your browser…”, “Tool finished” and “Browser action finished”.

Troubleshooting

Problem	What to do
“Sign in and connect first.” or “You are signed out. Sign in to the Platform, then connect.”	Select “Sign in to Platform”, then “Connect after sign in”.
“Complete your account in the Platform, then reconnect.”	Finish “Complete your account” on the sign-in page, then reconnect.
“Open a web page and click the extension toolbar icon before sharing it.”	Switch to the web page you want to share, click the toolbar icon on that page, and select “Share page” again.
“The tab changed origin. Click the extension toolbar icon and share it again.”	The tab moved to a different site. Share it again.
“Stop the active Run before sharing another page.”	Select “Stop”, then share the page.
“Share a tab first.” or “The browser device is offline. Reconnect and share the tab again.”	Share the page again, after reconnecting.
“Browser access revoked or call expired.”	The permission ran out. Ask again and select “Allow once” sooner.
“The page or element changed, is protected, or is unsupported.”	The agent could not use that element. Describe another way to do it, or do that step yourself.
“Page context exceeded its limit.”	The page is too large. Share a smaller page.
“Browser tools work only in Chat with the default agent.”	Use a normal Chat with the default agent, not Work or a custom agent.
You do not recognize the target of a requested action	Select “Deny”.

Agents

Kian Moradi · Part-time developer

It is Wednesday evening, and Neda has typed the same warranty answer twenty times today. Kian, the part-time developer who looks after Nilgoon's online store, decides she should not have to. He creates a customer support assistant, writes the shop's return and delivery rules as its instructions and tries it in the live preview. Then he attaches the knowledge base that holds the shop's policies.

Next morning Neda starts her first customer chat with the assistant, and the answers she used to retype appear in seconds, with their source.

In this chapter you will learn about "Create a custom agent", "Edit an agent", "Turn on agent behavior options", "Give an agent skills", "Attach knowledge bases to an agent", "Choose the plugin tools an agent can use", "Let an agent delegate to other agents", "Configure agent memory", "Protect sensitive data with guardrails", "Make an agent answer in a fixed format", "Set agent execution limits", "Choose voice and vision models for an agent" and "Connect an agent to a Telegram or Bale bot".

Create a custom agent

Purpose

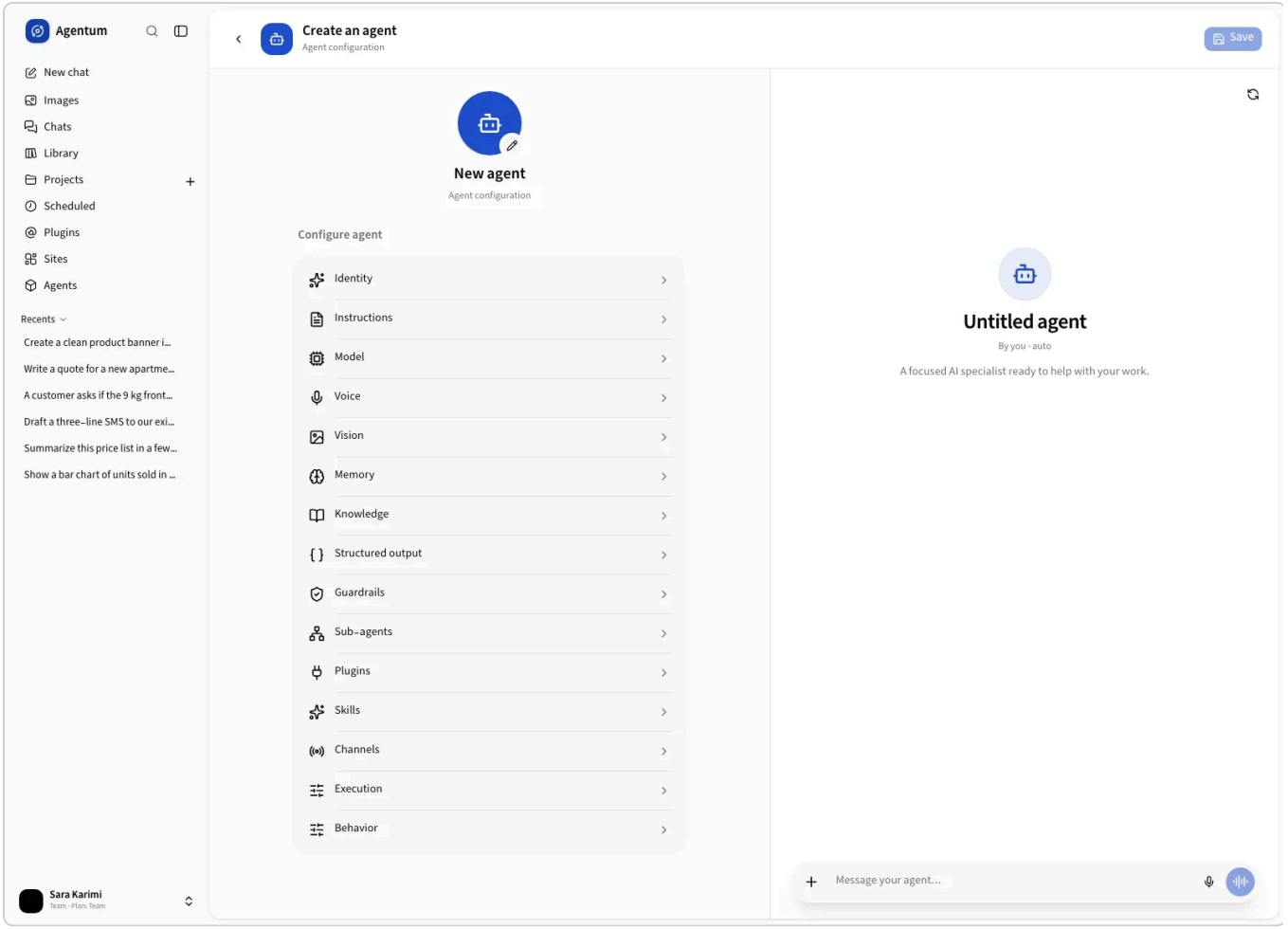
Neda keeps retyping the same warranty and delivery answers, and Kian would like to give her a helper that already knows the shop's rules. Create an agent with its own name, instructions, model and tools.

Before you start

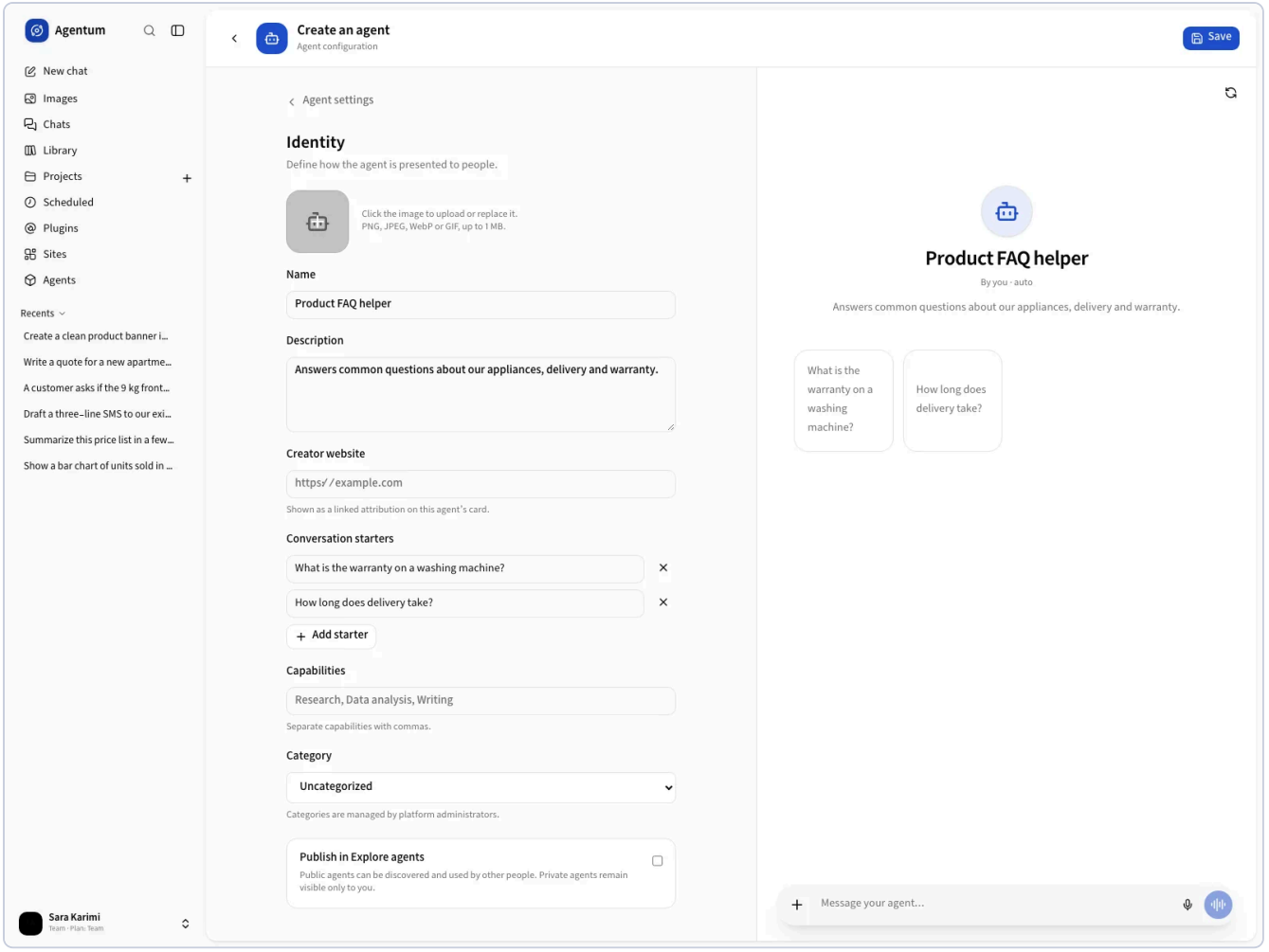
Your plan must include custom agents and you need permission to manage agents in the workspace. You also need at least one available text model. Plans have a limit on how many agents a workspace can hold.

Steps

1. Open “Agents” and select “New”. If you have no agents yet, select “Create agent”. The editor opens with a list under “Configure agent” on the left and a live preview chat of the unsaved agent on the right.
2. Select the picture at the top, or “Identity”. Fill in:
    - “Name” (required, up to 80 characters).
    - “Description” (up to 500 characters), a short public summary.
    - The agent image: select it to upload a PNG, JPEG, WebP or GIF up to 1 MB. “Remove agent image” clears it.
    - “Creator website” (optional, a valid web address, up to 500 characters), shown as a link on the agent’s card.
    - “Conversation starters”: “Add starter” up to 4, each up to 160 characters.
    - “Capabilities”, separated by commas (up to 12, each up to 100 characters).
    - “Category”, or “Uncategorized”.
    - “Publish in Explore agents” to let other people find and use the agent. Leave it off to keep the agent within your workspace.
3. Go back with “Agent settings”, open “Instructions” and write the “Agent instructions”. They are required and can be up to 12,000 characters.
4. Open “Model”. Choose the primary model and, if the model supports it, a reasoning effort. See “Edit an agent” for the other model settings.
5. Optional: add tools in “Plugins”, instructions bundles in “Skills”, and set memory, guardrails, channels and limits from the other sections. Each has its own article.
6. Try the agent in the preview on the right, then select “Save”.



The agent editor showing the list of sections and the live preview



The Identity section with name, description and conversation starters

Expected result

The agent is saved and a chat with it opens. It now appears under “My agents” in “Agents”.

Troubleshooting

Problem	What to do
“Save” is disabled	Enter a “Name”, choose an available primary model, and fix any error shown in “Structured output”.
Saving fails with an error under the header	Read the message. Common causes: empty “Agent instructions”, a plan without custom agents, the workspace agent limit, or a missing permission to manage agents.
“Icon must be smaller than 1 MB.”	Choose a smaller PNG, JPEG, WebP or GIF image.
“No enabled LLM models are available.”	No text model is enabled for you. Ask a workspace administrator.
The “Channels” section says to save first	Save the agent once, then connect a bot (see “Connect an agent to a Telegram or Bale bot”).

Edit an agent

Purpose

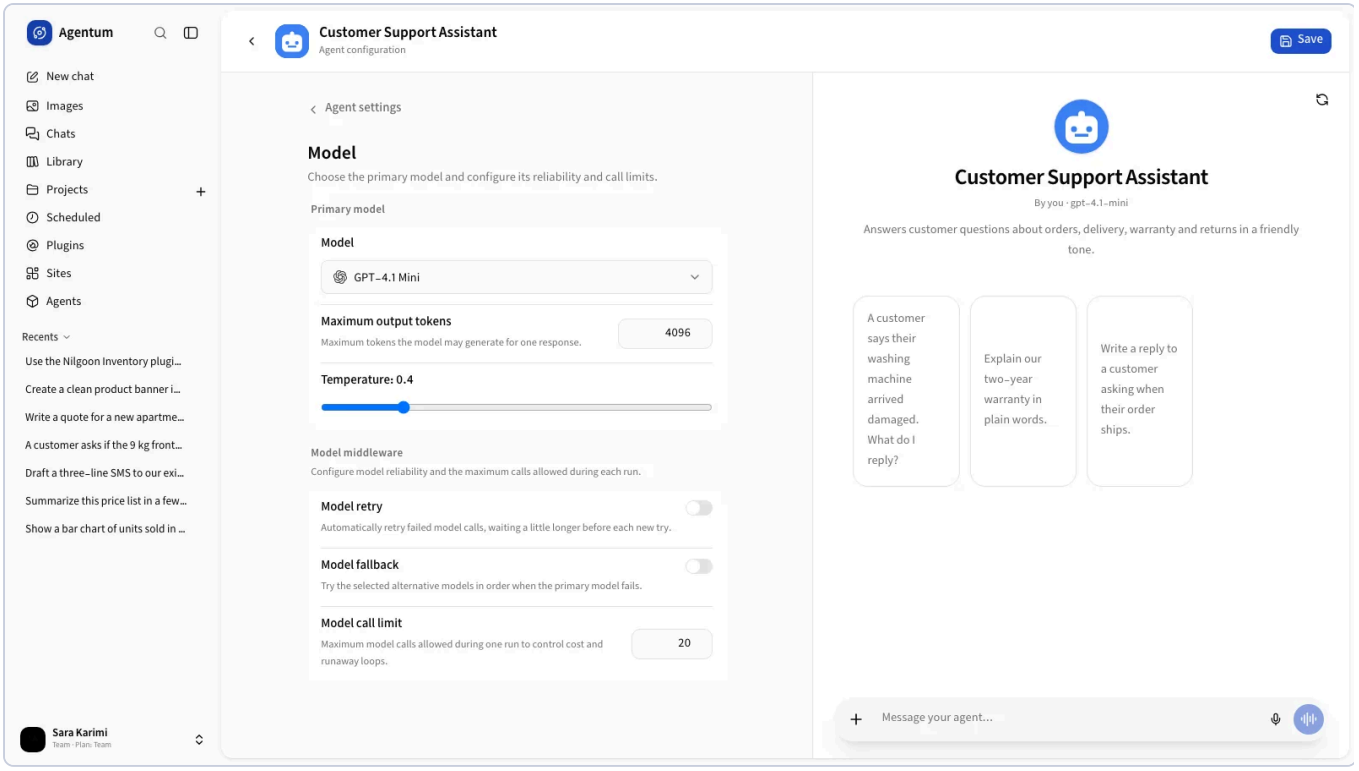
A few weeks in, Kian notices that the support assistant is wordier than a chat needs. Open the agent’s editor to change its identity, instructions, model and every other setting, and check the result in the live preview before you save.

Before you start

You can edit custom agents belonging to your current workspace if you have permission to manage agents.

Steps

1. Open “Agents”, find the agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”. The editor lists 15 sections under “Configure agent”. Select one to open it, and use “Agent settings” at the top of a section to return to the list.
2. “Identity” and “Instructions”: change the name, description, image, creator website, starters, capabilities, category, publishing and “Agent instructions”. See “Create a custom agent” for the limits.
3. “Model”: choose the “Primary model”. “Reasoning effort” appears only for models that support it (the choices are “Model default” and the levels the model offers); choosing a model that does not support the current effort clears it. Set “Maximum output tokens” (64 to 32,768) and “Temperature” (0 to 2, in steps of 0.1). Retries, fallback models and the model call limit are also here, described in “Set agent execution limits”.
4. “Voice” and “Vision”: see “Choose voice and vision models for an agent”.
5. “Memory”, “Knowledge”, “Structured output”, “Guardrails”, “Sub-agents”, “Plugins”, “Skills”, “Channels”, “Execution” and “Behavior” each have their own article.
6. Check the result in the live preview on the right, then select “Save”. Your changes stay in the editor until you save. Leaving without saving discards them.



The Model section with the primary model, output tokens and temperature

Expected result

The agent is updated and a chat with it opens. Later chats use the new settings. Existing chats are not rewritten.

Setting	Range
Maximum output tokens	64 to 32,768
Temperature	0 to 2

The model’s own limits still apply, so a high output setting does not guarantee a long answer.

Troubleshooting

Problem	What to do
“Edit agent” is missing	“Edit agent” appears for custom agents owned by your workspace. Saving changes requires permission to manage agents.
“Save” is disabled	The name is empty, the primary model is no longer available, or the structured output schema is invalid.
An error appears after “Save”	Read it, fix the setting it names and save again. Nothing is saved until the error is gone.

Turn on agent behavior options

Purpose

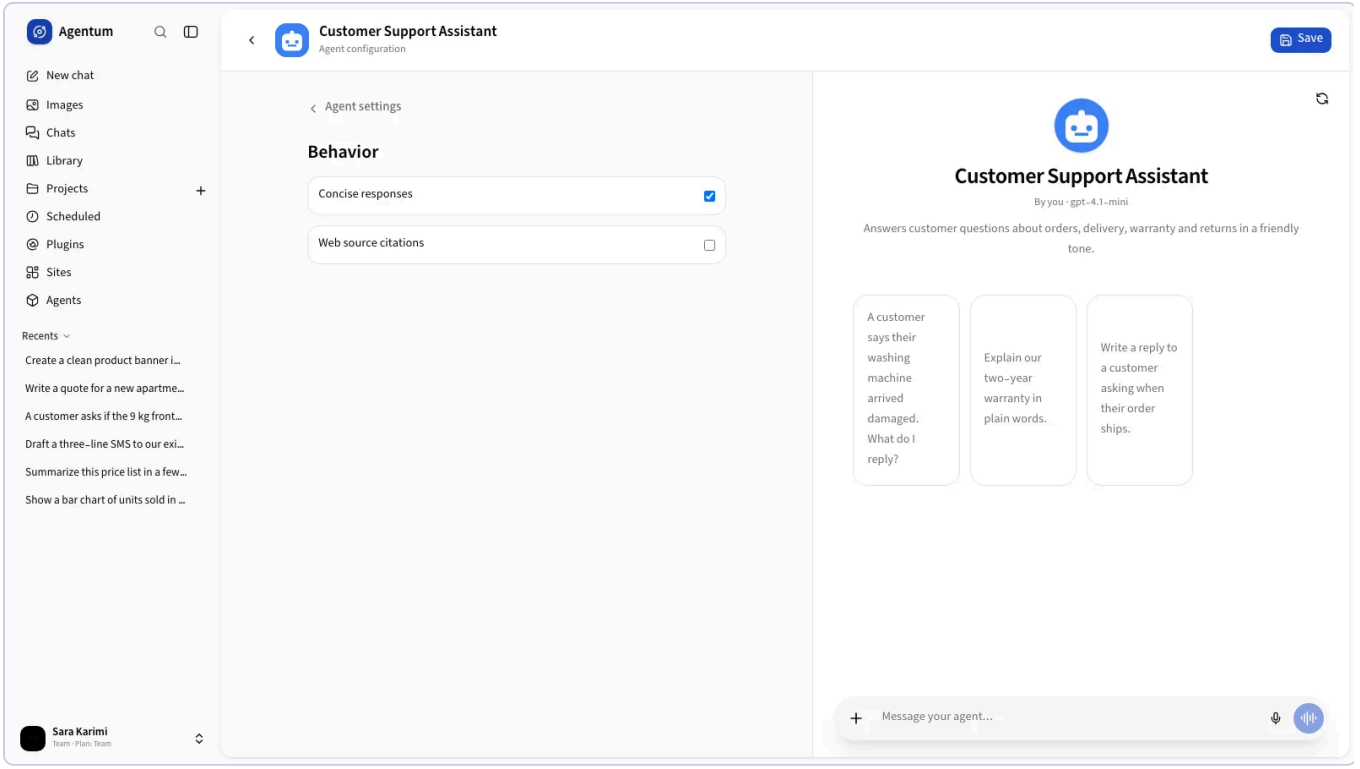
Neda’s customers want a quick answer, not an essay. Two small switches tell the agent to keep answers short and to name its web sources.

Before you start

The custom agent must belong to your current workspace, and you need permission to manage agents.

Steps

1. Open “Agents”, find your agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Behavior”. It lists two options, both off by default.
3. Tick “Concise responses” so the agent keeps answers short unless the person asks for detail.
4. Tick “Web source citations” so the agent includes the source addresses in its final answer when it used web tools.
5. Select “Save”.



The Behavior section with its two options

Expected result

These options guide later answers. Chats that already happened are not changed.

Troubleshooting

Problem	What to do
Sources are missing in an answer	If an answer used web tools but omitted sources, ask the agent to include them.
Answers are still long	Add your own length rules to the “Agent instructions”.

Give an agent skills

Purpose

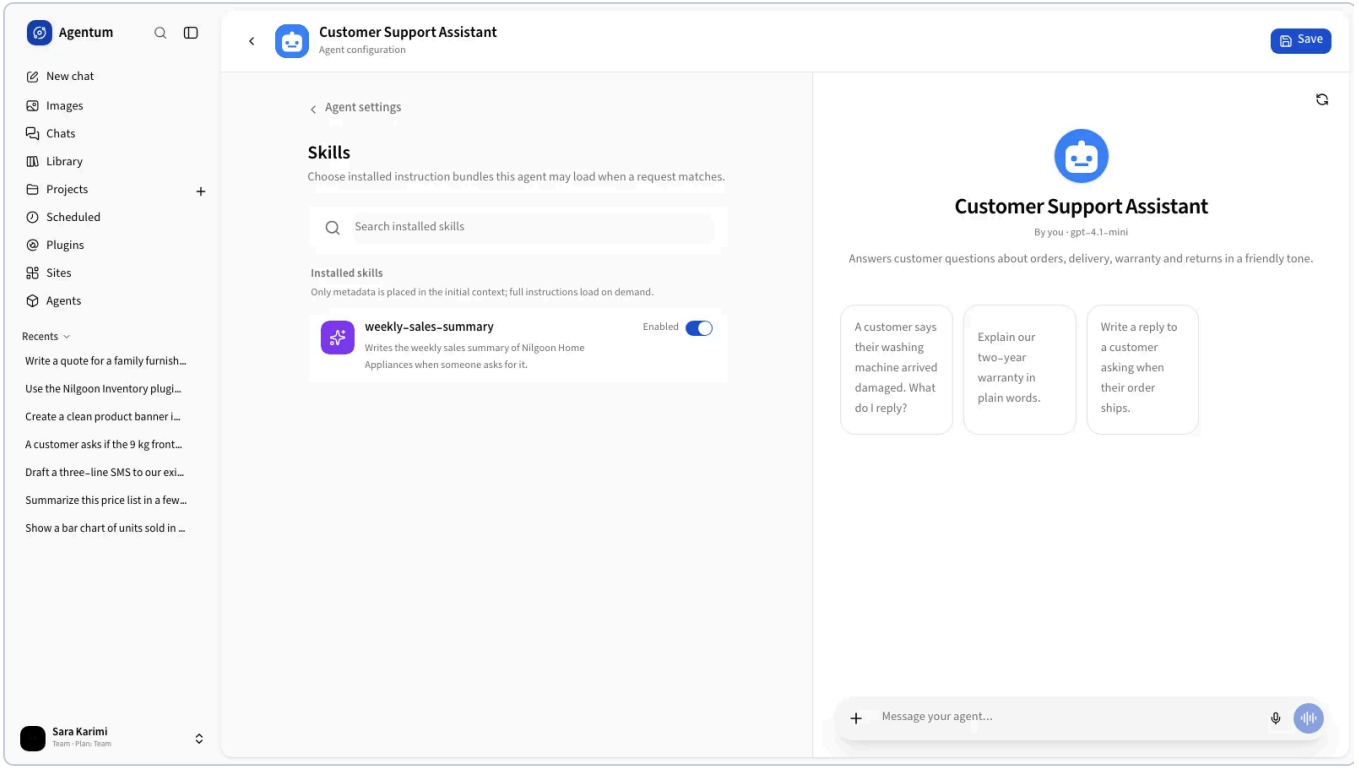
Kian has written down how Nilgoon's weekly summary should look, and he wants the agent to follow it only when someone asks for that summary. Give the agent skills, bundles of instructions it loads when a request matches them.

Before you start

The custom agent must belong to your current workspace, you need permission to manage agents, and the skill must be added to your workspace first (see "Add and manage skills"). A skill gives instructions only. It never grants tools.

Steps

1. Open "Agents", find the agent under "My agents" and select it. In the window, open "Agent actions" (the three dots) and choose "Edit agent".
2. Open "Skills". If it says "No installed skills", add one from the Skills page first. Use "Search installed skills" to filter by name, description or ID.
3. Under "Installed skills", switch on each skill the agent may use. The agent uses each skill's description to decide when to read its instructions.
4. A skill marked "Unavailable" was removed, disabled or lost access. Turn off an unavailable selected skill to remove it. If a "Remove" button is shown instead, select it.
5. Select "Save".



The Skills section with installed skills and their switches

Expected result

The agent can use the switched-on skills in later chats. Up to 100 skills can be selected.

Troubleshooting

Problem	What to do
A skill is not in the list	Installed skills and saved selections appear here. Disabled or inaccessible skills are marked “Unavailable” and cannot be saved as active selections. Add a missing skill from the Skills page.
“Save” says a skill is no longer accessible	Turn off the skill marked “Unavailable” (or select “Remove” if shown) and save again.

Attach knowledge bases to an agent

Purpose

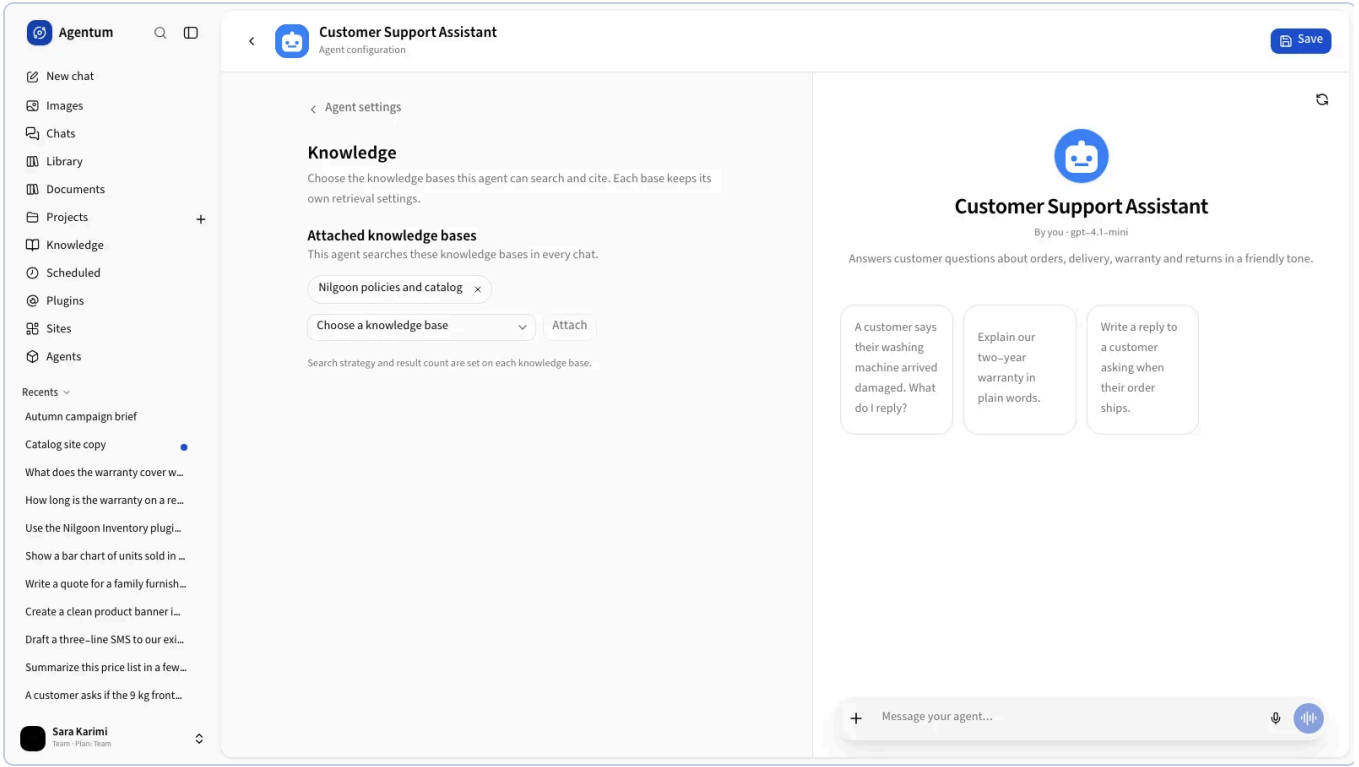
Neda’s customers keep asking about warranty and delivery, and the answers are already written down in the shop’s policy documents. Attach a knowledge base to the support assistant so it searches those documents in every chat and cites where each answer came from.

Before you start

The custom agent must belong to your current workspace and you need permission to manage agents. Attaching follows project permissions, so you also need permission to manage projects. Create the knowledge base first (see “Create and manage a knowledge base”). You can attach only knowledge bases you can see: one set to “Only me” is visible only to its creator. Save the agent at least once. Until then the section says “Save the agent first, then attach knowledge bases.”

Steps

1. Open “Agents”, find the agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Knowledge”. Under “Attached knowledge bases” you see the bases this agent already searches, or “Not attached to anything yet.”
3. In the list “Choose a knowledge base”, pick a base and select “Attach”. It appears as a chip with the base’s name. A base that is already attached is not offered again, and when none are left the section says “No other knowledge bases to attach.”
4. To stop using a base, select the cross on its chip (“Remove [name]”).
5. Attaching and removing take effect at once. You do not need to select “Save” for them. The search strategy and the number of results are not set here, because each knowledge base keeps its own.
6. Start a chat with the agent and ask something the documents answer. The tool row shows “Search knowledge”, and the answer cites numbered sources that open the original, with a “Knowledge sources” list under the reply (see “Ask questions about your knowledge bases”).



The Knowledge section with an attached knowledge base and the picker

Expected result

The agent searches every attached knowledge base whenever a question needs it, in every chat, and cites the passages its answer uses. It can use only the bases that the person chatting can see at that moment, so a base set to “Only me” does not help other people who chat with the agent.

Troubleshooting

Problem	What to do
The section says “Save the agent first, then attach knowledge bases.”	Save the agent once (see “Create a custom agent”), then open “Edit agent” again.
A knowledge base is missing from the list	Only bases you can see are offered. Ask its creator to set “Who can see it” to “Everyone in the workspace”, or create a new base.
Attaching or removing fails	Read the message under the list and try again. You need permission to manage projects as well as agents.
The agent does not use the documents	Check that the knowledge base has items with the status “Ready”, and ask a question the documents actually answer. The person chatting must be able to see the base.

Choose the plugin tools an agent can use

Purpose

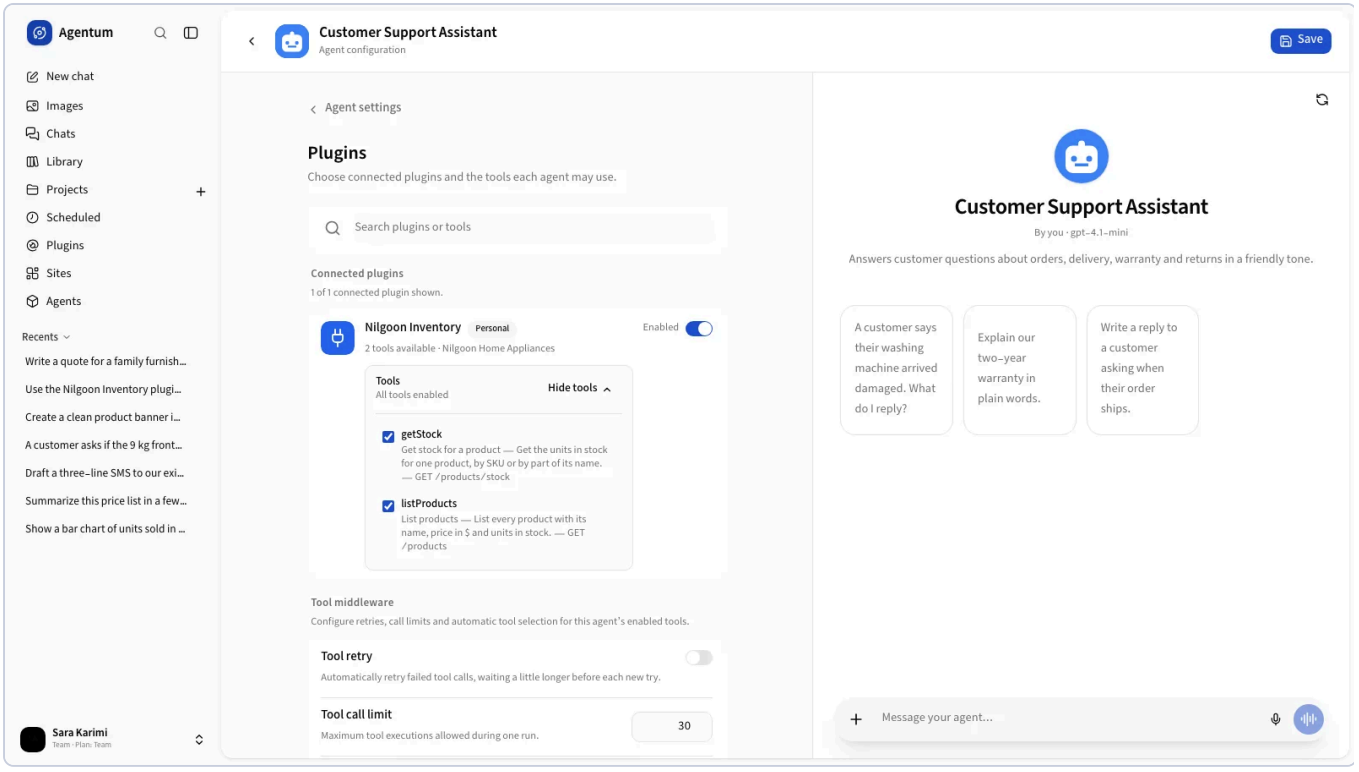
Kian has connected the inventory plugin, but the support assistant cannot use it until he says so. Give the agent access to your connected plugins, and limit it to the tools you want it to use.

Before you start

The custom agent must belong to your current workspace, you need permission to manage agents, and the plugin must be connected for you first (see “Connect a plugin”). Workspace rules decide which plugins you can connect.

Steps

1. Open “Agents”, find the agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Plugins”. If it says “No connected plugins”, connect one from the Plugins page first. Use “Search plugins or tools” to find a plugin by name, developer, capability or tool.
3. Under “Connected plugins”, switch on each plugin the agent may use. A plugin you added yourself carries the “Personal” badge. A switched-on plugin shows “All tools enabled” by default.
4. To allow only some tools, select “Choose tools” and tick the ones to allow. At least one tool always stays ticked. A saved configuration can hold up to 50 plugins, and up to 200 explicitly chosen tools per plugin (“All tools enabled” is not counted against the 200). “Use all” brings back the full list, and “Hide tools” closes the list.
5. Switch a plugin off to give the agent none of its tools.
6. Below the list, “Tool middleware” holds retries, the tool call limit and the tool selector (see “Set agent execution limits”).
7. Select “Save” and test with a request that needs one of the allowed tools.



The Plugins section with a plugin switched on and its tool list open

Expected result

The agent can use only the tools you left ticked, and only while the plugin stays connected for you.

Troubleshooting

Problem	What to do
A plugin does not appear	Only connected plugins are listed. Connect it first, then reopen the editor.
A plugin shows no tools	Reconnect it so its tools are discovered again.
The agent cannot use a tool you ticked	The plugin was disconnected, or a workspace rule does not allow it.

Let an agent delegate to other agents

Purpose

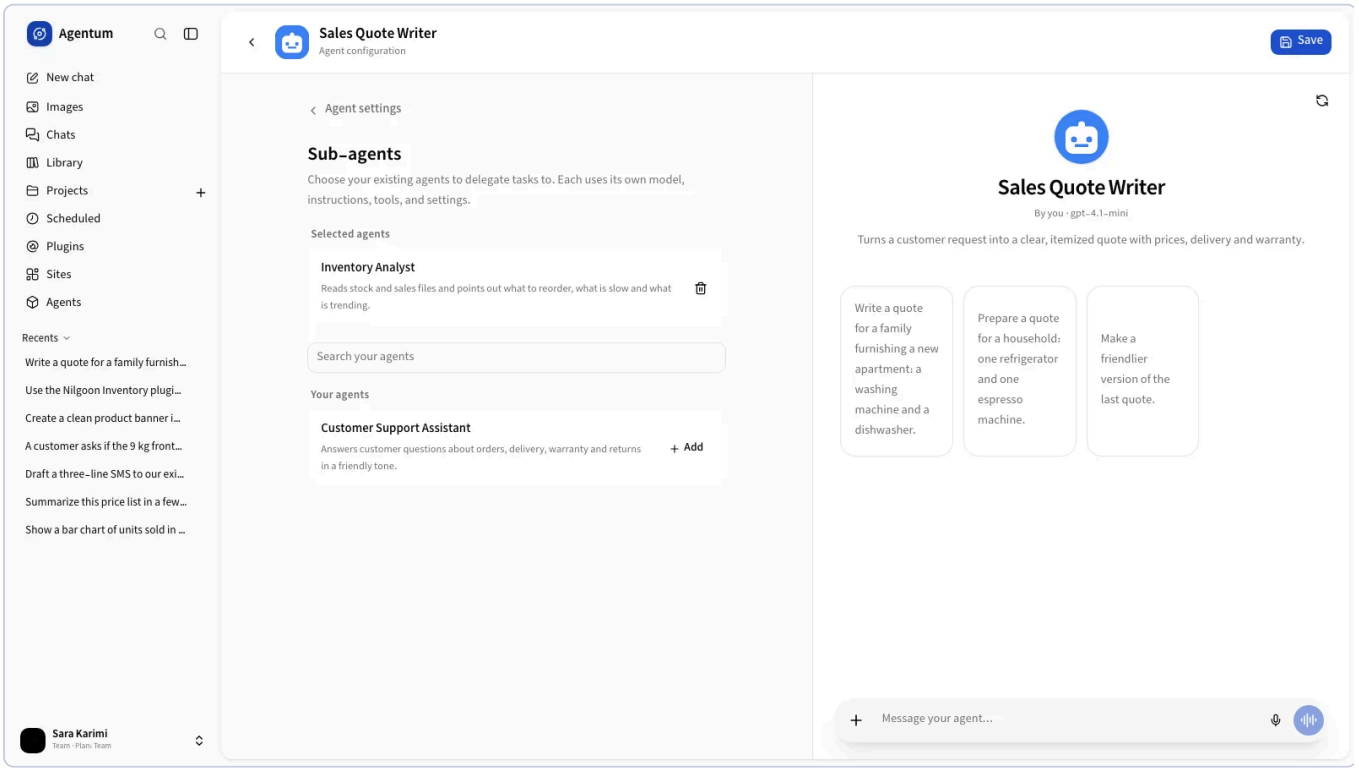
One agent that does everything gets muddled. Choose other custom agents in your current workspace that this agent can hand tasks to, so a stock question goes to the inventory analyst. Each one works with its own model, instructions, tools and settings.

Before you start

You need permission to manage the parent agent, and there must be at least one other custom agent in your current workspace. Only those agents can be chosen.

Steps

1. Open “Agents”, find the agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Sub-agents”.
3. Under “Agents”, type in “Search your agents” to filter, then select “Add” next to each agent that should receive delegated tasks. The agent you are editing is not listed. You can choose up to 50.
4. The chosen agents appear under “Selected agents”. Select the trash button next to one to remove it. An entry named “Unavailable agent” means the agent is no longer available to this workspace: remove it.
5. Select “Save”, then test with a request the sub-agent is good at.



The Sub-agents section with selected agents and the list to add from

Expected result

The agent can delegate suitable work to the selected sub-agents. It decides for itself when to delegate, so not every request is handed off.

Troubleshooting

Problem	What to do
No agents are listed	Clear the search. You need other custom agents in this workspace.
“Save” is rejected	A selection that points back to the agent itself or forms a loop is refused, and so is one that includes an agent you cannot access or a very deeply nested chain of delegation. Remove inaccessible agents, break the loop or simplify the nesting, then save again.
“No sub-agents selected.”	Nothing is selected yet. Add one from the list below.

Configure agent memory

Purpose

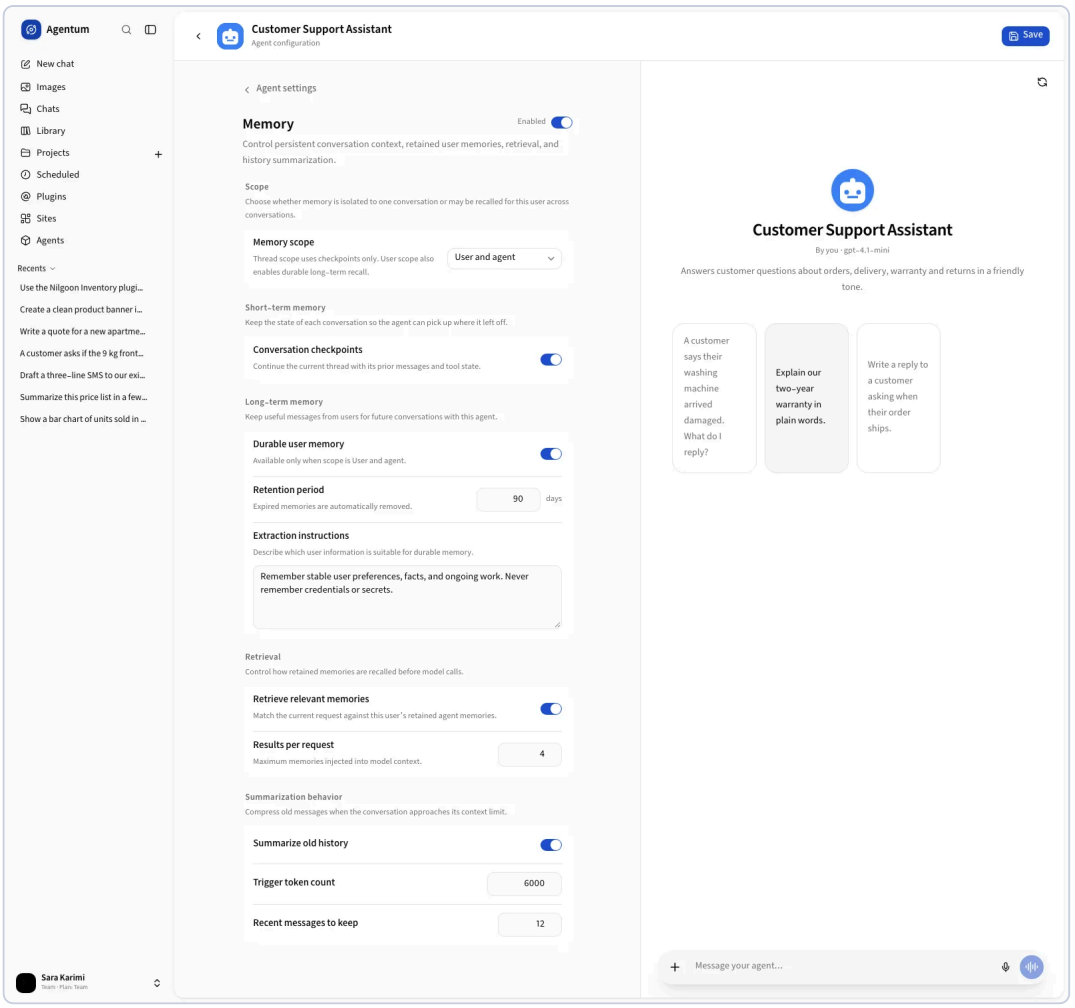
Neda should not have to explain a regular customer’s order again every time she opens a new chat with the assistant. Choose how an agent keeps the current conversation, what it remembers about a user across conversations, and how it shortens long history.

Before you start

The custom agent must belong to your current workspace, and you need permission to manage agents. Memory belongs to the agent: each person who talks to it has separate memory.

Steps

1. Open “Agents”, find your agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Memory”. The switch at the top, “Enable memory”, turns the whole section on or off. While it is off, the settings below cannot be edited.
3. Under “Scope”, set “Memory scope” to “Current conversation” (memory stays inside one conversation) or “User and agent” (the agent can recall facts for the same user across conversations). Choosing “Current conversation” turns durable memory off, and turning on “Durable user memory” switches the scope to “User and agent”.
4. Under “Short-term memory”, “Conversation checkpoints” lets the agent continue the current conversation with its earlier messages and tool state.
5. Under “Long-term memory”, turn on “Durable user memory” to keep useful facts for later conversations. Set “Retention period” (days) and write “Extraction instructions”. Durable memory retains message text for later recall. Extraction instructions guide how recalled information is used; they do not prevent storage. Turn durable memory off if you do not want messages retained this way.
6. Under “Retrieval”, turn on “Retrieve relevant memories” so the agent recalls matching facts before it answers, and set “Results per request”.
7. Under “Summarization behavior”, turn on “Summarize old history” to compress old messages when the conversation gets long. Set “Trigger token count” and “Recent messages to keep”.
8. Select “Save”.



The Memory section with scope, durable memory, retrieval and summarization

Expected result

Control	Range	Starts at
Retention period	1 to 3,650 days	90
Extraction instructions	Up to 2,000 characters	A short default guidance text
Results per request	1 to 20	6
Trigger token count	1,000 to 200,000	12,000
Recent messages to keep	1 to 100	20

New agents start with memory on, “Current conversation” scope, checkpoints on, durable memory off, retrieval on and summarization on. Expired memories are removed automatically. Turning memory off does not delete past chats.

Troubleshooting

Problem	What to do
Controls are greyed out	Turn on “Enable memory” first.
The agent does not recall facts from earlier chats	Use scope “User and agent” and turn on both “Durable user memory” and “Retrieve relevant memories”. Facts older than the retention period are gone.
Sensitive details were remembered	Extraction instructions are guidance, not a filter, and durable memory retains message text (truncated to 4,000 characters) for later recall. Turn durable memory off if you do not want messages retained, and do not share secrets in chat.
“Save” fails	Read the error under the header and save again.

Protect sensitive data with guardrails

Purpose

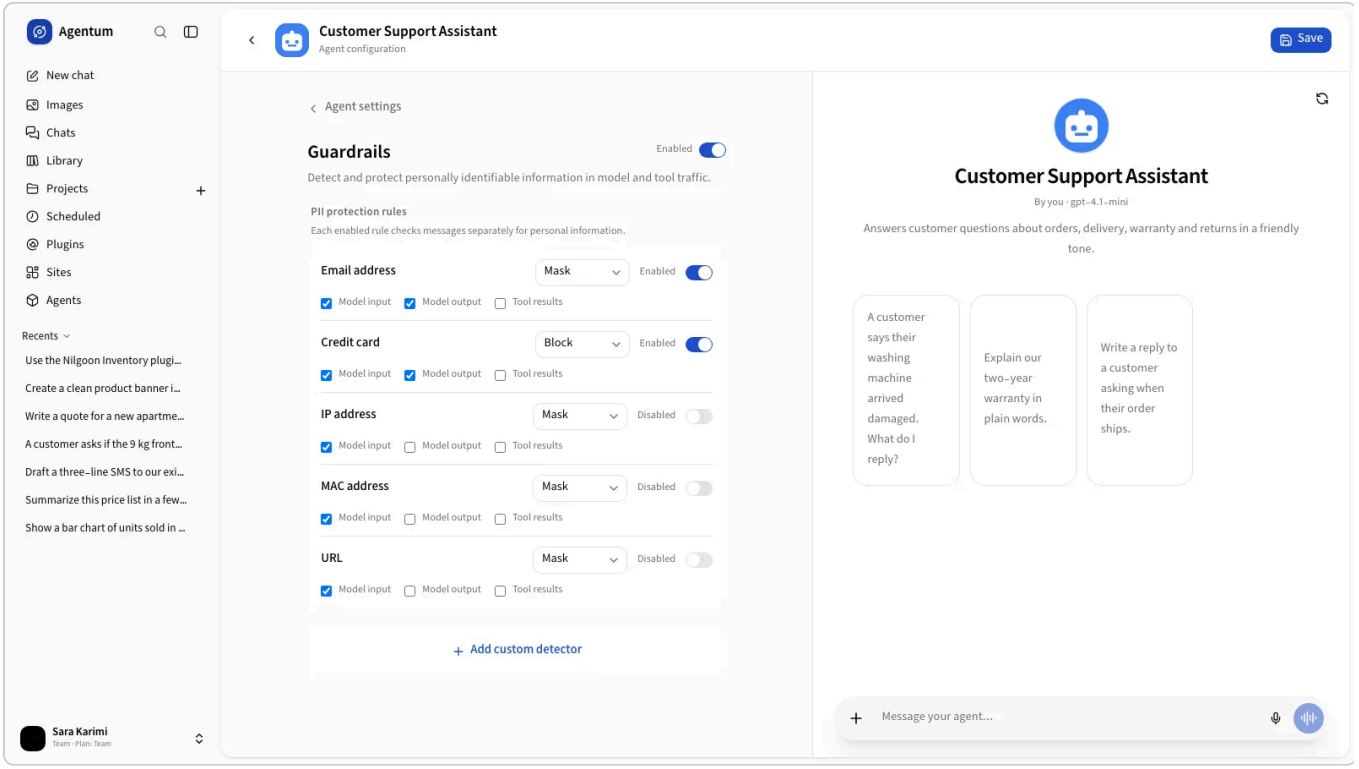
Now and then Neda pastes in a customer message that includes an email address or a card number. Guardrails detect personal information in what an agent reads and writes, and remove it, mask it, replace it with a code or stop the run.

Before you start

The custom agent must belong to your current workspace, and you need permission to manage agents. Use made-up examples when you test: never test with real passwords, customer identifiers or card numbers.

Steps

1. Open “Agents”, find your agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Guardrails” and turn the section switch on. While it is off, the rules cannot be edited. The switch alone does not enable any rule.
3. Under “PII protection rules” you see five built-in rules: “Email address”, “Credit card”, “IP address”, “MAC address” and “URL”. For each rule you want, turn on its switch, then choose a strategy: “Redact” (remove the value), “Mask” (hide part of it), “Hash” (replace the value with a code) or “Block” (stop the run when it is found).
4. For each rule, tick where it applies: “Model input”, “Model output” and “Tool results”. An enabled rule needs at least one of them.
5. To catch something else, select “Add custom detector”. Enter a “Custom PII type” (a short name, up to 80 characters) and the detector pattern for it (a regular expression, up to 2,000 characters). The new rule starts switched off, with “Mask” and “Model input” selected. Choose its strategy and scopes, then switch it on.
6. To remove a custom rule, select its trash button. Built-in rules cannot be deleted, only switched off.
7. Select “Save”.



The Guardrails section with built-in rules, strategies and scopes

Expected result

Every enabled rule is applied where you ticked it. You can have up to 50 rules, and only one enabled rule for each type.

Troubleshooting

Problem	What to do
Rule controls are greyed out	Turn on the section switch at the top of “Guardrails”.
“Save” fails for a custom rule	An enabled custom rule needs a detector pattern that is a valid regular expression and at least one ticked scope. Two enabled rules cannot share a type. An invalid detector pattern can prevent saving even when its rule is off. Correct the pattern, clear it, or remove the custom rule.
A run stops when a value is found	The rule uses “Block”. Choose “Redact” or “Mask” if you want the run to continue.
Some sensitive data still appears	Detection cannot recognize every value. Guardrails do not delete saved chats or stop every outside action.

Make an agent answer in a fixed format

Purpose

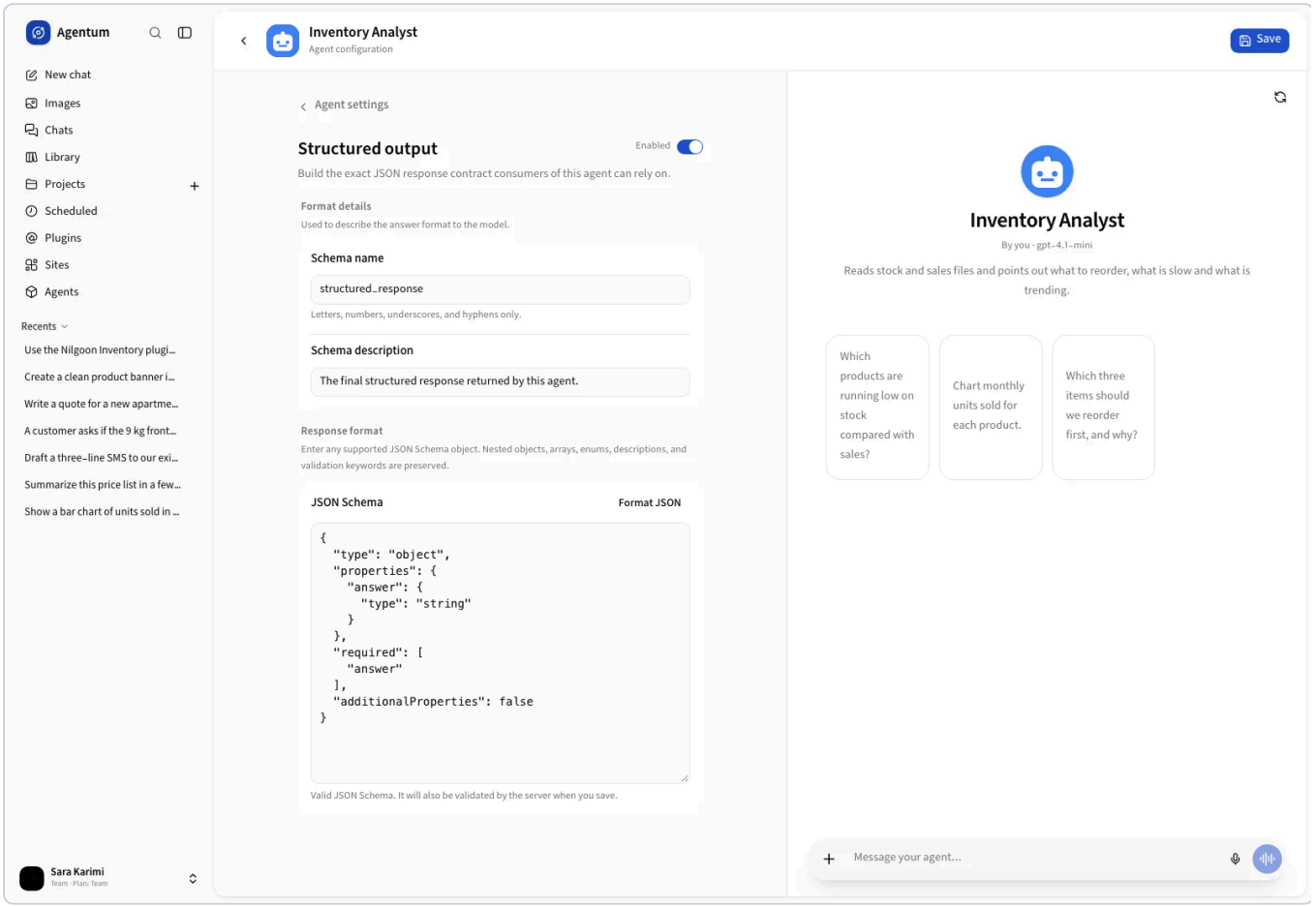
Kian’s order script needs an answer it can read the same way every time, not a paragraph of prose. Require the agent’s final answer to follow a JSON Schema, so other programs can rely on its shape.

Before you start

The custom agent must belong to your current workspace, you need permission to manage agents, and you must know the JSON Schema you want. The chosen model must support structured answers.

Steps

1. Open “Agents”, find your agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Structured output” and turn it on. While it is off, the fields cannot be edited.
3. Under “Format details”, enter a “Schema name” (start with an English letter; then use English letters, digits, underscores or hyphens; up to 64 characters) and a “Schema description” (up to 500 characters).
4. Under “Response format”, edit the “JSON Schema”. The root must be an object with a “properties” object, and every property needs a type: object, array, string, number, integer, boolean or null. Names in “required” must exist in “properties”, arrays need “items” and an “enum” cannot be empty.
5. Read the message under the editor. It confirms that the schema is valid (the server checks it again when you save) or describes the problem. Syntax errors may identify a line and column; schema errors identify the invalid requirement or field. “Format JSON” tidies a valid schema and does nothing for an invalid one.
6. Select “Save”.



The Structured output section with the schema name and JSON Schema editor

Expected result

Field	Limit
Schema name	1 to 64 characters
Schema description	Up to 500 characters
JSON Schema	Under 50 KB
Property name	1 to 100 characters
Nesting depth	Up to 12 levels

The agent’s final answer follows the schema. The schema does not give the agent new tools.

Troubleshooting

Problem	What to do
“Save” is disabled	Structured output is on and the schema is invalid. Fix the message shown under the editor.
“Invalid JSON at line 3, column 5.” (any line and column)	Fix the JSON syntax at that spot, such as a missing comma or quote.
“The root schema type must be object.”	Make the top-level “type” an object and add “properties”.
The model cannot follow the schema	Simplify the schema or choose a different model in “Model”.

Set agent execution limits

Purpose

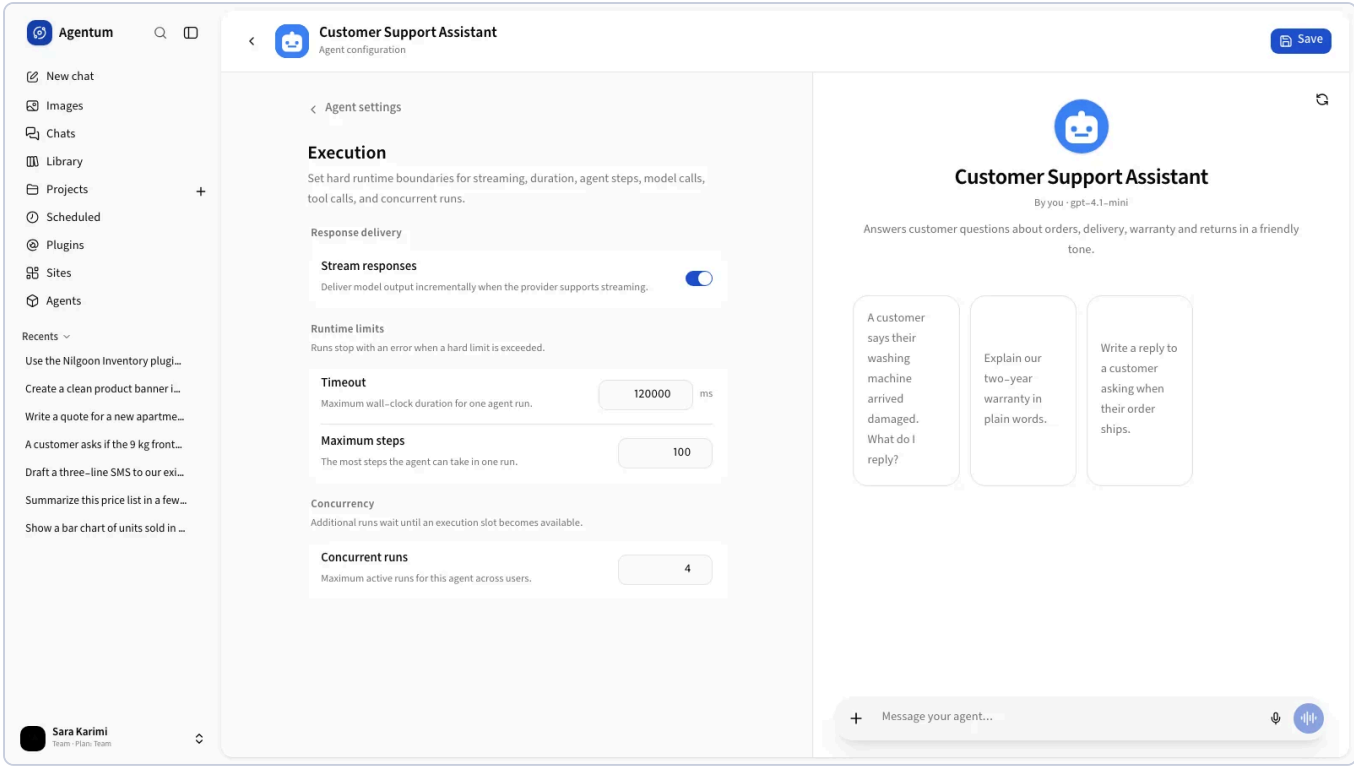
Kian does not want one runaway request to eat the shop’s plan. Control how an agent delivers answers and put hard limits on its runs, model calls and tool calls.

Before you start

The custom agent must belong to your current workspace, and you need permission to manage agents. Larger limits and retries can use more of your plan’s usage and never add capacity to it.

Steps

1. Open “Agents”, find your agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Execution”. Set “Stream responses” (deliver the answer piece by piece), “Timeout” (milliseconds), “Maximum steps” and “Concurrent runs”.
3. Open “Model”. Under “Model middleware”, turn on “Model retry” and set “Maximum model retries” (0 to 10 retries after the first attempt). Turn on “Model fallback” to add up to four alternative models, tried in order when the primary model fails; the primary model cannot be its own fallback. Set “Maximum model calls per run” under “Model call limit”.
4. Open “Plugins”. Under “Tool middleware”, turn on “Tool retry” with “Maximum tool retries” (0 to 10), set “Maximum tool calls per run” under “Tool call limit”, and optionally turn on “LLM tool selector” with “Maximum selected tools” (1 to 50), which narrows the enabled tools to the most relevant ones before each model call. This limits the tools chosen by the selector. Essential tools may remain available in addition to that number.
5. Select “Save”.



The Execution section with timeout, steps and concurrent runs

Expected result

Control	Allowed range	Starts at
Timeout	1,000 to 900,000 ms	180,000 ms
Maximum steps	1 to 100	25
Maximum model calls	1 to 100	20
Maximum tool calls	1 to 500	30
Concurrent runs	1 to 50	4

A run stops with an error when it passes a hard limit. When more runs start than “Concurrent runs” allows, the extra runs wait for a free slot. Concurrent runs count all users of the agent together.

Troubleshooting

Problem	What to do
A run ends with a timeout or a limit error	Simplify the request, or raise the limit that was reached.
A tool action happened twice	A retry repeats the call. Turn off “Tool retry” for tools that change data, such as sending a message.
A fallback model is not offered	Only models that are available to you and are not the primary model can be added.
“Save” fails	Read the error under the header. Nothing is saved until it is fixed.

Choose voice and vision models for an agent

Purpose

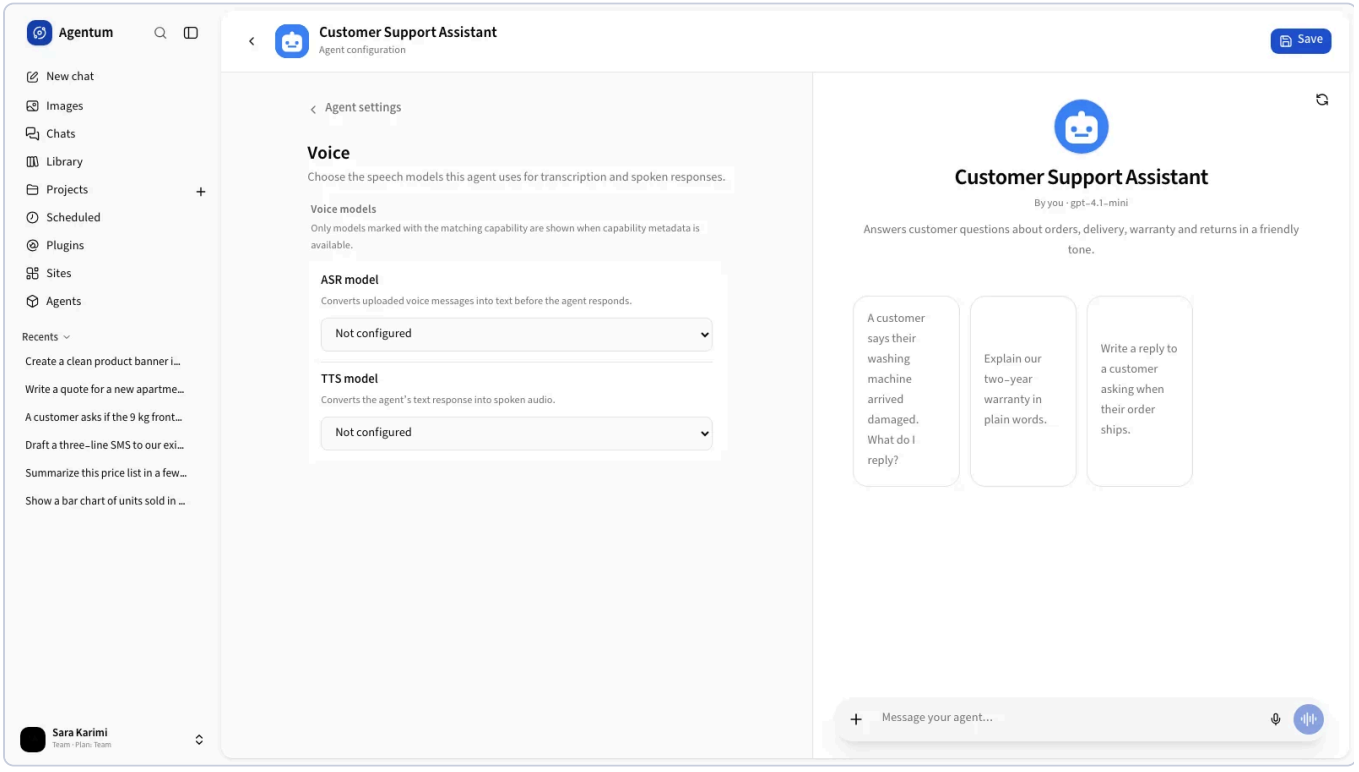
Many of Neda’s customers send a voice message instead of typing. Pick the models an agent uses to turn speech into text and to create images. These are separate from the agent’s main text model. The choices for speaking answers and reading text in documents are saved but do not yet change how the agent works.

Before you start

The custom agent must belong to your current workspace, and you need permission to manage agents. Choose a model with the matching ability. An old selection may remain visible but fail validation when you save.

Steps

1. Open “Agents”, find your agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Voice”. “ASR model” converts uploaded voice messages into text before the agent answers. Choose a model for “ASR model”, or leave “Not configured”. The TTS and OCR choices are saved, but currently do not change how the agent answers or reads documents.
3. Open “Vision”. “Image generation model” creates or edits images from a text request and an optional reference image. Choose a model, or leave “Not configured”.
4. If a list says “No compatible models are available yet.”, no model with that ability is enabled for you.
5. Select “Save”.



The Voice section with the speech-to-text and text-to-speech model lists

Expected result

The agent uses the chosen transcription and image generation models for those jobs. Choosing “Not configured” for a job clears that choice.

Troubleshooting

Problem	What to do
A model you expect is missing	It is not enabled for you, or it lacks the matching ability. Ask a workspace administrator.
“Save” fails with a model error	The saved choice no longer fits the model’s abilities. Pick another model and save again.

Connect an agent to a Telegram or Bale bot

Purpose

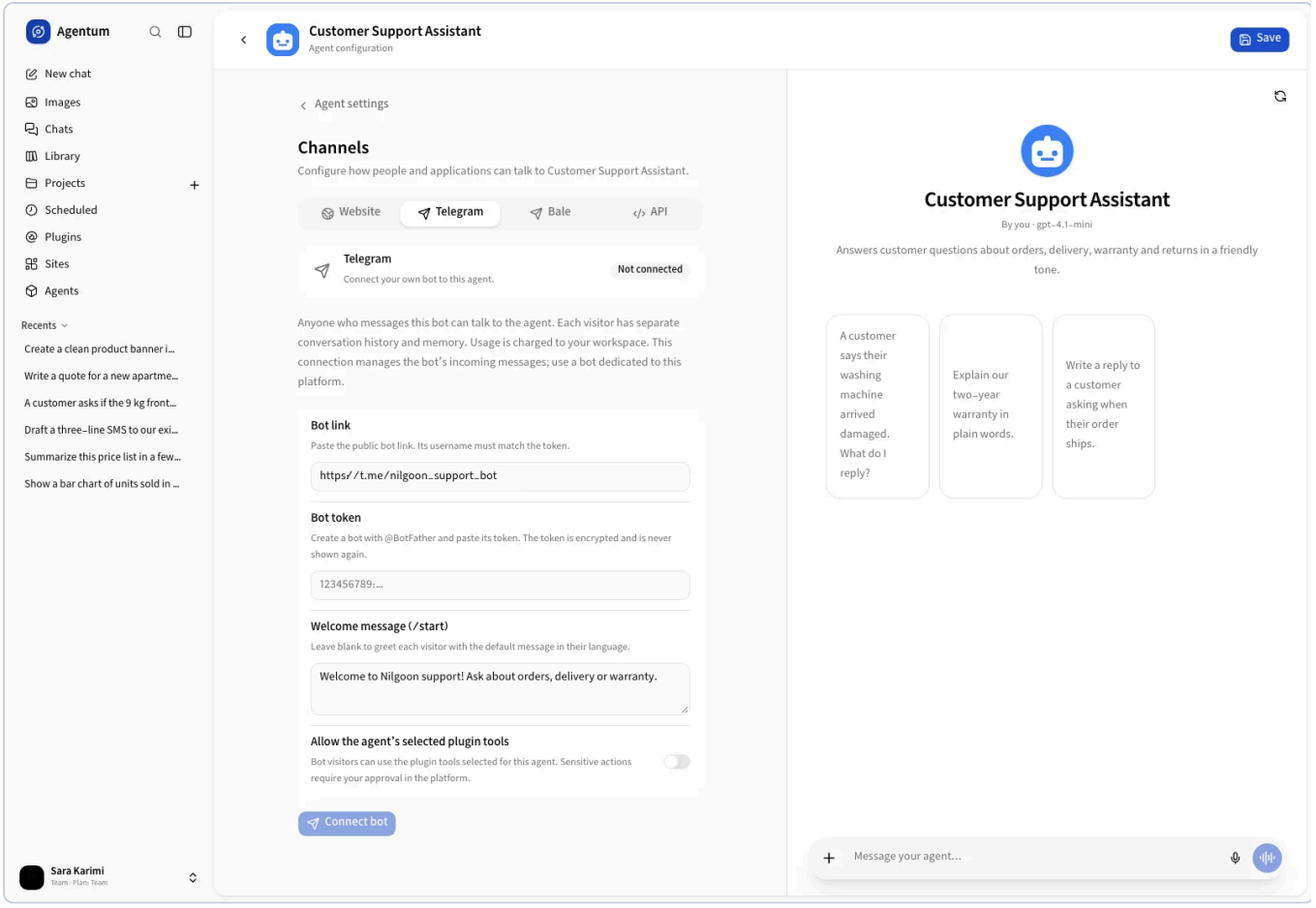
At eleven at night a customer still wants to know if the oven comes in black, and Neda has long gone home. Give the support assistant its own Telegram or Bale bot, so anyone can talk to it directly, day or night.

Before you start

- Save the agent first. Until it is saved, the “Channels” section says “Save this agent before connecting a bot.”
- Create a bot with @BotFather in Telegram, or @Bot_Father in Bale, and keep its token private.
- Use a saved custom agent belonging to your current workspace, and have permission to manage agents.

Steps

1. Open “Agents”, find the agent under “My agents” and select it. In the window, open “Agent actions” (the three dots) and choose “Edit agent”.
2. Open “Channels” and choose the “Telegram” or “Bale” tab. The “Website” and “API” tabs are previews and cannot be used to connect this agent.
3. Paste the public link of your bot into “Bot link” (the link people use to open it). Its username must match the token.
4. Paste the token into “Bot token”. It is encrypted and never shown again, so you enter it again whenever you reconnect.
5. Optional: write a “Welcome message (/start)” of up to 1,000 characters. Leave it empty to greet each visitor with the default message in their own language.
6. Decide on “Allow the agent’s selected plugin tools”. When it is on, visitors of the bot can use the plugin tools chosen for this agent. Only tools you picked one by one with “Choose tools” in the agent’s “Plugins” section count: a plugin left on “All tools enabled” gives visitors none of its tools. Every plugin tool call a visitor triggers still waits for your approval in Agentum, because a plugin’s tools are never treated as read-only. If nobody approves within 2 minutes, the call fails. Turn it on only for tools that are safe for a public audience.
7. Select “Connect bot”. The status badge shows “Connecting”, then “Connected”. Open the bot and send a message to test it.
8. To stop the bot, select “Disconnect”. To change the link, token, welcome message or tools, edit them and select “Save and reconnect”.



The Channels section with the Telegram tab, bot link, token and welcome message

Expected result

The status is “Connected” and shows the bot’s name and username, with a link to open it and the time of the “Last received update”. Anyone who messages the bot can talk to the agent. Each visitor has a separate conversation history and memory, and the usage is charged to your workspace. This is separate from your own personal Agentum Telegram connection.

Troubleshooting

Problem	What to do
“Connect bot” is disabled	Fill in both “Bot link” and “Bot token”.
An error says the link and token belong to different bots	Use the link of the bot that issued the token.
An error says the token is not valid	Copy the whole token from the bot manager again. It contains digits, a colon and letters.
“The bot could not be verified. Check its token and try again.”	Make sure the token belongs to a bot that still exists, copy it again from the bot manager and select “Connect bot” again.
An error says the bot is the platform’s official bot	Create your own bot. The official one cannot be connected to an individual agent.
An error says this bot or agent channel is already connected elsewhere	Another workspace member connected this agent’s channel, or the bot is connected to another agent. Disconnect it there first, or use a different bot.
The badge says “Connection issue”	Read the message below it, fix the token or link, and select “Save and reconnect”.
“Connected” but the bot does not answer	The badge does not prove that messages are answered. Send a test message and check “Last received update”.

Plugins and skills

Kian Moradi · Part-time developer

Nilgoon's stock lives in one system, the prices in a spreadsheet, and nobody on the team can ask either of them a question. Kian, who looks after the shop's systems, opens Plugins on a quiet Sunday and finds the inventory plugin. He reads what it offers, connects it and switches it on for the support assistant. When a customer asks whether a dishwasher is in stock, the answer now comes with real numbers.

The same afternoon he adds a skill that sets out how the weekly summary should look, so the report Neda schedules for Saturday morning comes out the same way every week.

In this chapter you will learn about "Browse plugins and see what they offer", "Connect a plugin", "Add your own plugin to the workspace", "Add and manage skills" and "Create or upload a workspace skill".

Browse plugins and see what they offer

Purpose

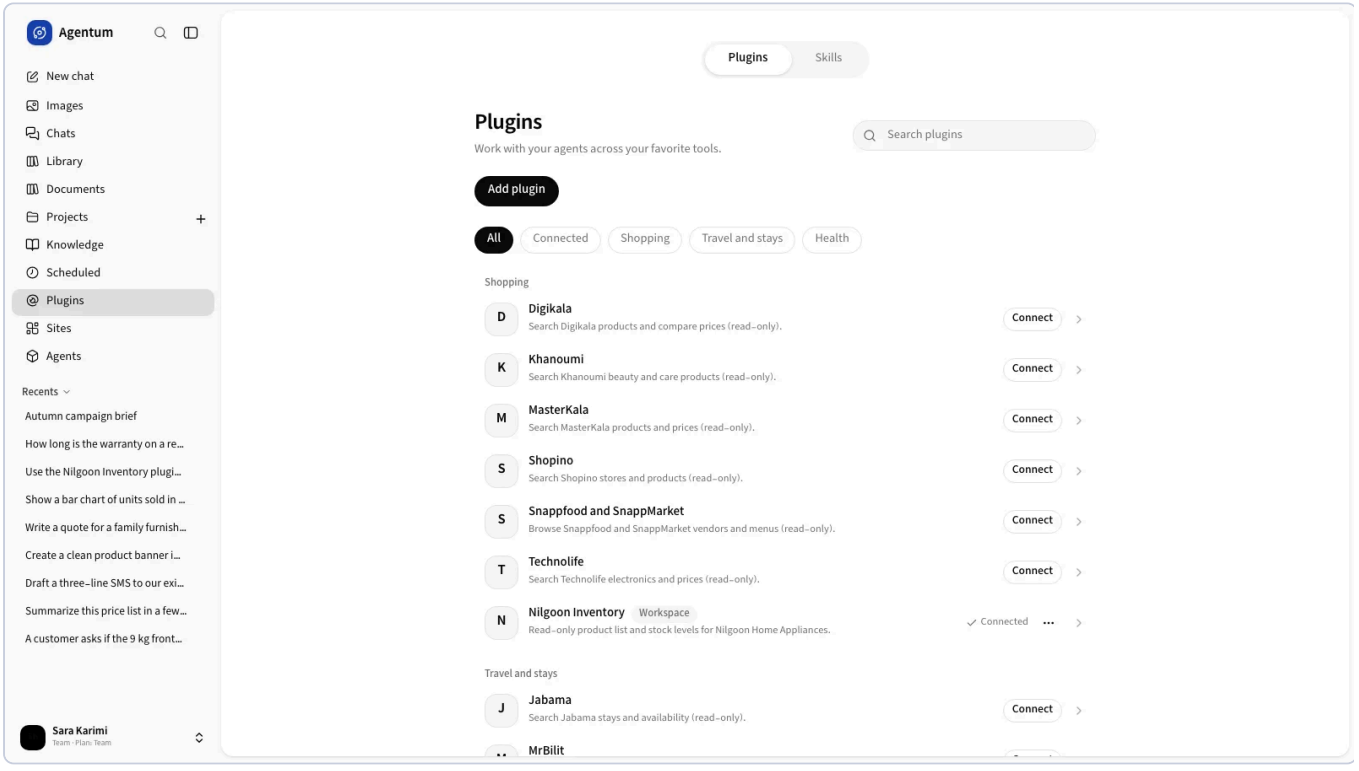
Stock lives in one system and prices in a spreadsheet, and before he connects anything Kian wants to see what a plugin does and who made it. Find a plugin that connects your agents to another tool, and read its details before you connect it.

Before you start

Sign in and select your workspace. A plugin is a tool provider. Connecting one (see "Connect a plugin") makes its tools available to your agents.

Steps

1. Open “Plugins” in the sidebar. The page is titled “Plugins” and has two tabs at the top: “Plugins” and “Skills”.
2. One list shows the public plugins together with the ones added to your workspace, grouped by category. A plugin added to your workspace carries a “Workspace” badge, and a plugin you have connected is marked “Connected”.
3. Use the filter chips above the list: “All”, “Connected” (only your connected plugins) or a category such as “Shopping”, “Travel and stays”, “Health”, “Productivity”, “Communication”, “Developer tools” or “Other”. Only categories that contain plugins appear. If you have connected nothing, “Connected” says “You have not connected any plugins yet.”
4. Type in “Search plugins” to filter. When nothing matches, the page says that no plugins match your search.
5. Select a plugin to open its page. It shows the developer under the name and a short description. When the plugin lists capabilities, a “Try it” list offers up to three example requests; selecting one opens a new chat with that request typed in the message box. The “Information” list shows its capabilities, developer, category, provider, “OpenAPI specification” (for OpenAPI plugins), website, version, privacy policy and terms of service, the discovered “Tools” and “Skills”.
6. Select the list button next to “Tools” (labeled “View [name] tool details”) to read each tool’s name and description. Before you connect, the list says “Connect to discover tools”.
7. Use “Connect” on the page, or the “Connect” button on a row, to connect (see “Connect a plugin”).



The Plugins page with filter chips and the plugin list

Expected result

You know what a plugin does, who made it and which tools it offers. Browsing a plugin does not authorize it to act in a chat. Adding your own plugin may contact its service to check the connection and discover tools.

Troubleshooting

Problem	What to do
“No tools discovered” on a connected plugin	Disconnect and connect again so the tools are discovered.
A plugin you added is missing	Clear the search and choose “All”. Plugins added to your workspace carry a “Workspace” badge.
An old category link	It opens the same “Plugins” page, filtered to that category when it still exists.
The “Connectors” link in an old bookmark	It leads to the same “Plugins” page.

Connect a plugin

Purpose

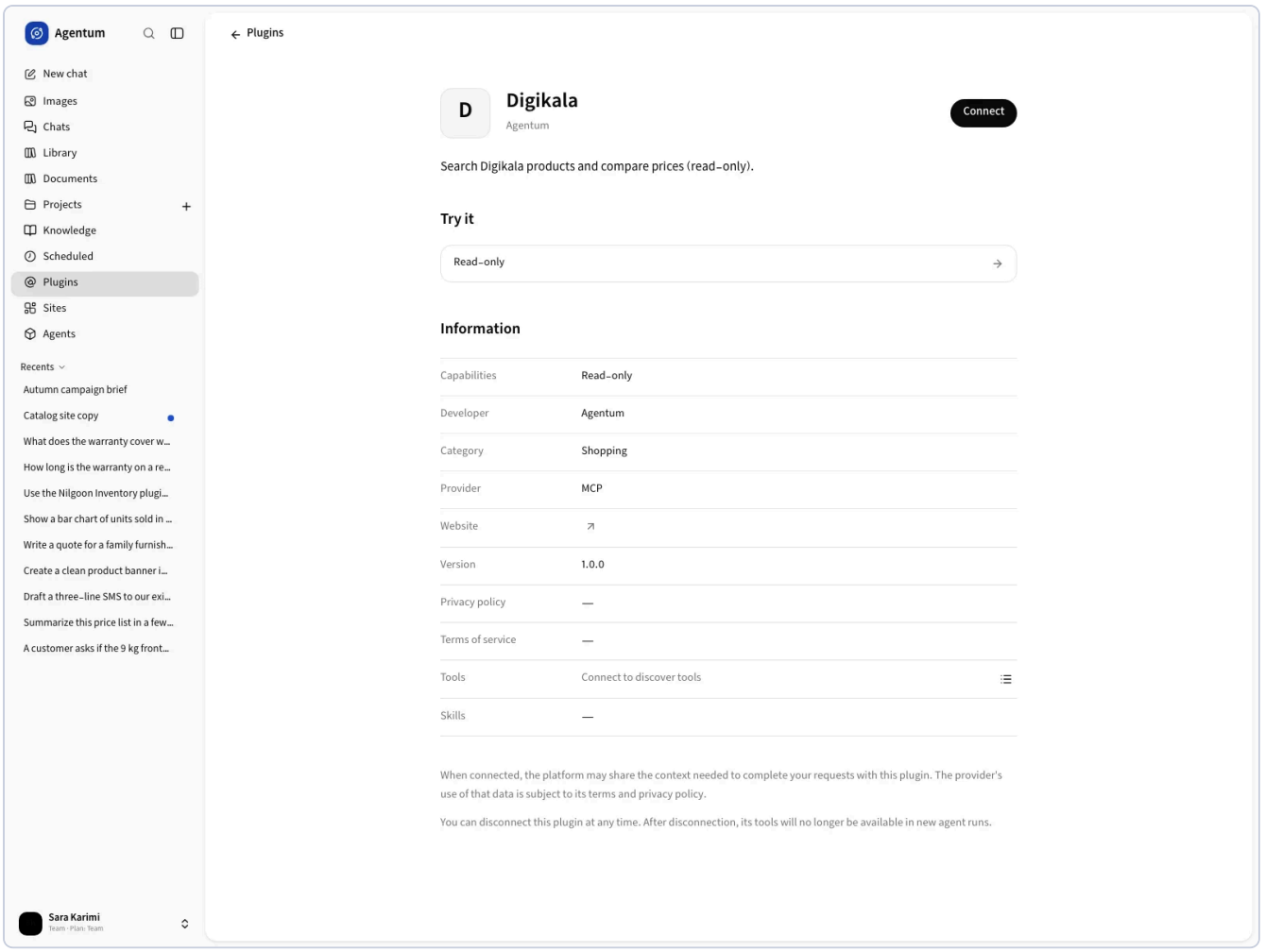
Until Kian connects the inventory plugin, nobody on the team can ask a question about stock. Connect a plugin so your agents can use its tools, and disconnect or delete it later when you no longer need it.

Before you start

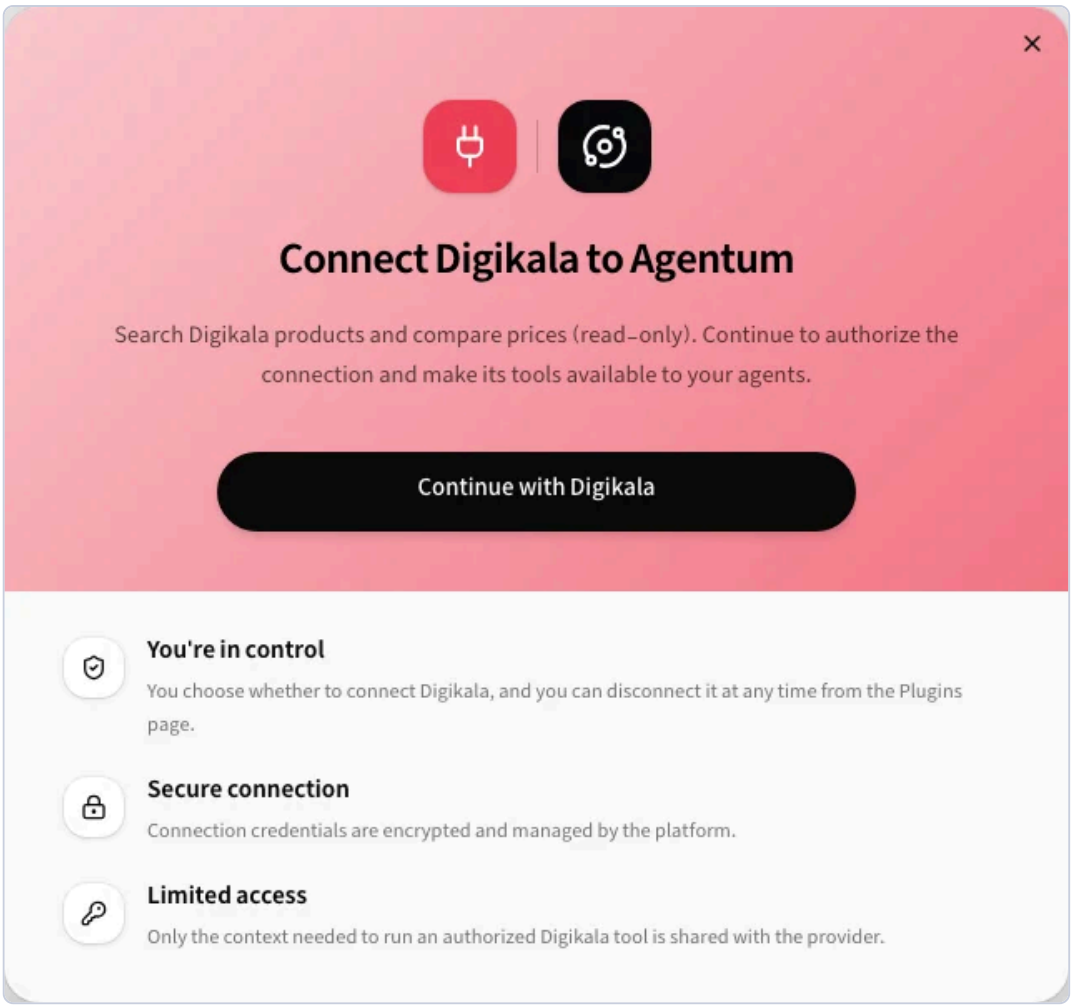
You need permission to use plugins in the workspace. Workspace rules can restrict which plugins are allowed.

Steps

1. Open “Plugins” and open the plugin you want (see “Browse plugins and see what they offer”).
2. Select “Connect”. A window titled “Connect [name] to Agentum” explains the connection: you choose whether to connect, the connection details are stored encrypted, and only the context needed to run an authorized tool is shared with the provider.
3. Select “Continue with [name]”. For a plugin that signs you in (OAuth 2.1), you are sent to the provider to approve access and then return to Agentum. For the other methods (no authentication, API key, bearer token) the connection is made right away.
4. When the page shows “Try in chat” and the “Tools” list fills in, the plugin is connected. “Try in chat” opens a new chat; when the plugin lists capabilities, the first one is already typed in the message box. Send it, or ask for another task that needs this plugin; the button does not select the plugin automatically. Then give your agent access: for the default agent, manage access in Settings, “Plugins” (see “Plugin tools”); for a custom agent, enable the plugin in its “Plugins” section (see “Choose the plugin tools an agent can use”).
5. To disconnect, open “More actions for [name]” on the plugin page and choose “Disconnect”, or select “Manage [name]” on the plugin’s row in the list (“Manage connection” in “Actions for [name]” for a plugin you added). In the window “[name] is connected”, select “Disconnect [name]”. The window also shows the plugin, the time connected, the endpoint and the authentication method.
6. If you added the plugin yourself and have permission to manage plugins, you can delete it: on the plugin page “Delete plugin” is in “More actions for [name]” while it is connected, or in “Plugin actions” (the three dots next to “Connect”) while it is not; on the list it is in the row menu “Actions for [name]”. Confirm “Delete [name]?” with “Delete plugin”. This removes the plugin and its connections from the workspace and cannot be undone.



The plugin page with the Connect button and the Information list



The connection window with the Continue button

Expected result

The plugin shows as connected, is marked “Connected” in the plugins list and appears under the “Connected” filter. After a disconnect, its tools are no longer available in new agent runs. You can connect it again any time.

Troubleshooting

Problem	What to do
The connection fails or is rejected	Read the error in the window and try again. The provider or a workspace rule may not allow it.
The provider sign-in does not finish	Return to the plugin page and select “Connect” again.
“Delete plugin” is missing	Only the person who added a plugin can delete it, and deleting also needs permission to manage plugins. A visible “Delete plugin” can still be rejected by workspace permissions.
The plugin is connected but an agent ignores it	Connecting does not give every agent access. For the default agent, manage access in Settings, “Plugins” (see “Plugin tools”). For a custom agent, enable the plugin in its “Plugins” section.

Add your own plugin to the workspace

Purpose

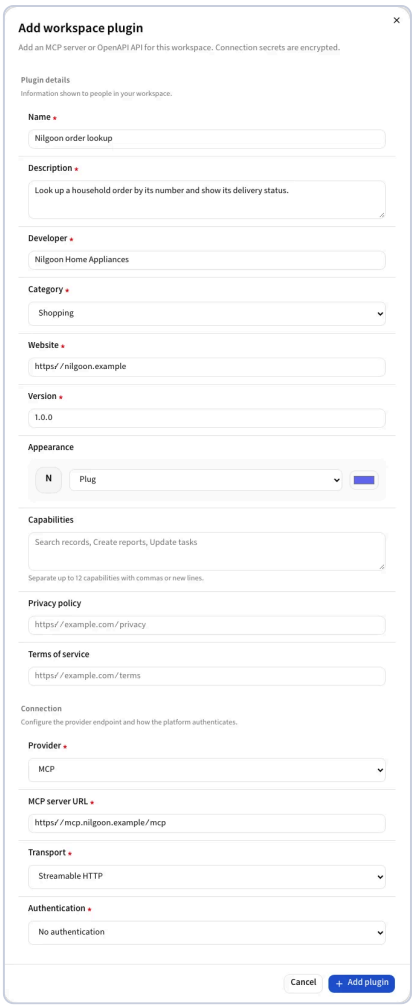
The shop’s order system is not in the catalog, so Kian adds it himself. Add a tool provider of your own, either an MCP server or an API described by an OpenAPI specification, so agents in the workspace can use it after it is connected.

Before you start

You need permission to manage plugins in this workspace. Have the provider’s address and connection details ready (server URL or specification, and an API key, token or OAuth client if it needs one). Keep secrets out of chats and shared documents. The plugin is added to the workspace you have selected.

Steps

1. Open “Plugins” and select “Add plugin” in the page header.
2. Under “Plugin details” fill in “Name”, “Description”, “Developer”, “Category”, “Website” and “Version” (all required). Choose the “Plugin icon” and “Plugin color”. Optionally add “Capabilities”, separated by commas or new lines, and “Privacy policy” and “Terms of service” addresses.
3. Under “Connection”, choose the “Provider”: “MCP” or “OpenAPI”.
    - MCP: enter the “MCP server URL” and choose the “Transport”, “Streamable HTTP” or “SSE”.
    - OpenAPI: paste the JSON or YAML text into “OpenAPI specification”. Fill “API base URL” only when the specification does not give a full server address.
4. Choose the “Authentication”: “No authentication”, “OAuth 2.1”, “API key” or “Bearer token”.
    - “API key”: enter the “API key header” and the key.
    - “Bearer token”: enter the token.
    - “OAuth 2.1”: optionally enter “OAuth client ID”, “OAuth client secret” and “OAuth scopes” (leave the client ID empty when the provider supports automatic registration).
5. Select “Add plugin” and wait. For sign-in-based plugins, tool discovery happens after you connect. Other plugins are checked while being added: Agentum contacts the provider to discover its tools. When it succeeds, the new plugin’s page opens. Connect it next (see “Connect a plugin”), then give an agent access: for the default agent in Settings, “Plugins” (see “Plugin tools”), for a custom agent in its “Plugins” section.



The Add workspace plugin window with details and connection settings

Expected result

The plugin appears in the plugins list with a “Workspace” badge. Adding it does not connect it and does not give agents access. Secrets are stored encrypted.

Field	Limit
Name, Developer	2 to 80 characters
Description	10 to 300 characters
Version	1 to 30 characters
Website, server URL, Privacy policy, Terms of service	A valid address, up to 500 characters
Capabilities	Up to 12 entries, each up to 100 characters
OpenAPI specification	Up to 1,500,000 characters
OAuth client ID	Up to 500 characters
OAuth client secret, OAuth scopes	Up to 2,000 characters
API key header	Up to 100 characters
API key or bearer token	Up to 4,000 characters

Troubleshooting

Problem	What to do
“Add plugin” is disabled or the form will not submit	Fill the required fields and make sure at least one category exists in the list.
An error appears and the window stays open	Read it, correct the address or credentials, and try again. If the creation check fails because the provider cannot be reached, nothing is added. (Sign-in-based plugins are not checked until you connect.)
An error says the plugin address can’t be used	Use a public https address. Addresses that are not https, or that point to a private or internal network, are refused.
The plugin has no tools after connecting	Check the address and credentials, then disconnect and connect again.

Add and manage skills

Purpose

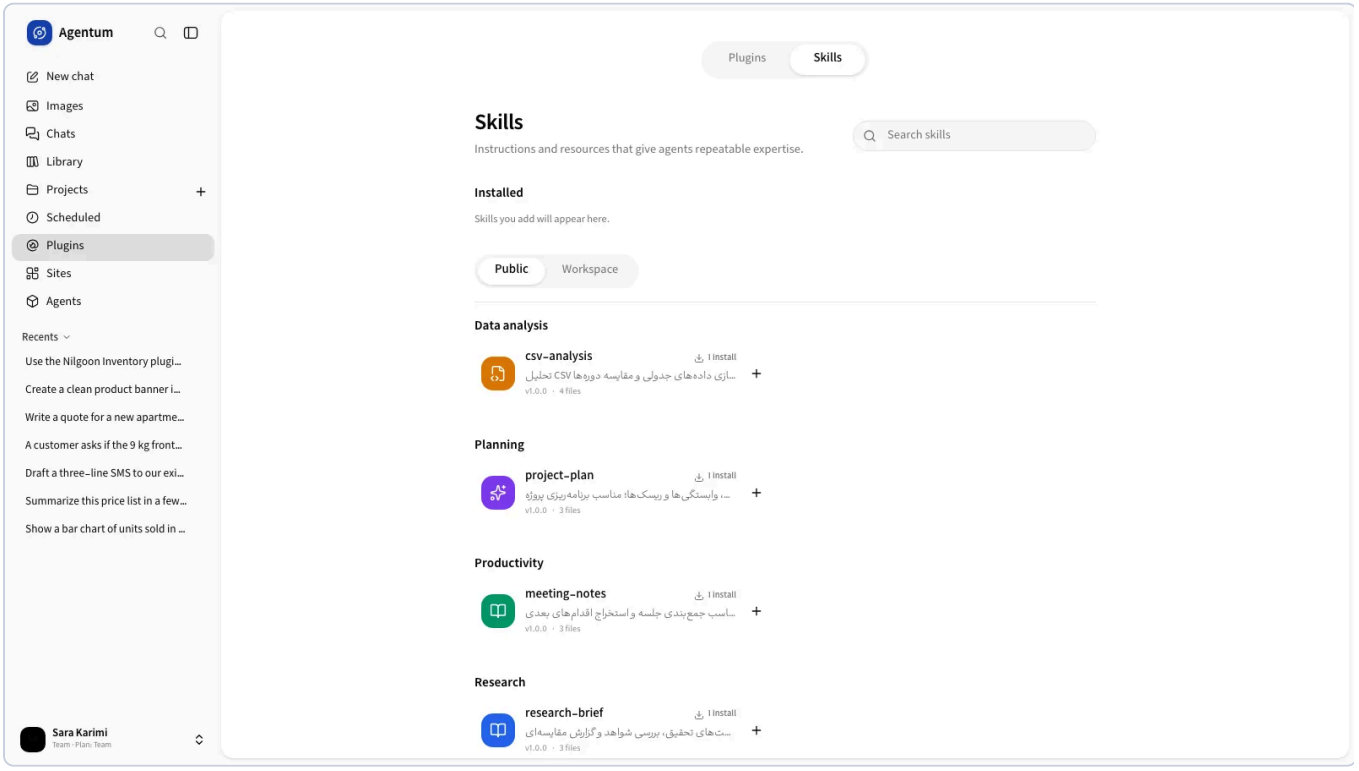
Neda’s Saturday summary of last week’s orders comes out in a different shape every week. Before anyone builds a skill for it, look for one that already does the job: read what is inside, add it to your workspace and try it. A skill is a bundle of instructions and files that an agent loads when a request matches it. It never gives an agent new tools.

Before you start

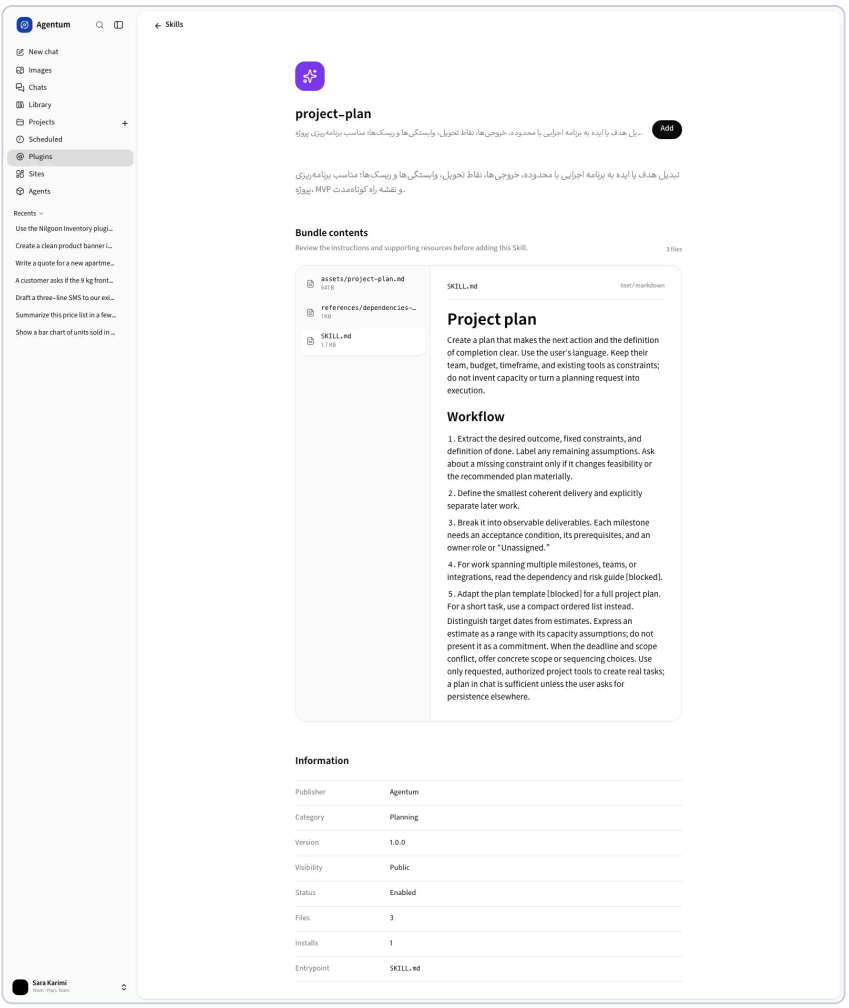
Sign in and select your workspace.

Steps

1. Open “Plugins” in the sidebar and select the “Skills” tab under “Marketplace”. Under “Installed” you see the skills already added (“Skills you add will appear here.” when there are none).
2. Use “Skill scope” to switch between “Public skills” and “Workspace skills”. Type in “Search skills” to filter. Skills are grouped by category, such as “Data analysis”, “Planning”, “Productivity” and “Research”. Each row shows how many times it was installed, and a “Disabled” badge when the publisher turned it off.
3. Select a skill to open its page. The “Information” list shows the publisher, category, version, visibility, status, number of files, installs, entrypoint, license and compatibility. Under “Bundle contents” select a file to read it.
4. Select “Add” (or the plus button on the row). Then “Try in chat” opens a new chat. Ask for a task that needs this skill; the button does not select it automatically. A disabled skill cannot be added or tried.
5. To use it in a custom agent, switch it on in the agent’s “Skills” section (see “Give an agent skills”).
6. To take a public skill off your workspace, open the menu on its row or page and choose “Remove skill”.
7. For a workspace skill you created: select the upload button (“Upload a new [name] version”) to replace the bundle with a new version, or open “More actions for [name]” and choose “Delete skill”. Confirm “Delete [name]?” with “Delete”. This removes the skill and its installations and cannot be undone. A workspace skill is already added, so it has no “Remove skill” and cannot be uninstalled.



The Skills tab with installed skills, scope switch and categories



A skill page with its information list and bundle contents

Expected result

An added, enabled skill is available to the default agent automatically. A custom agent can use it once you switch it on in the agent's "Skills" section. Agents read its instructions and supporting files only when a request needs them, and only in read-only form.

Troubleshooting

Problem	What to do
"Add" is disabled	The skill is disabled. Pick another skill or ask its publisher.
"Preview is not available for this file type."	Only text-like files can be previewed.
The skill is added but the agent does not use it	This applies to custom agents: switch it on in the agent's "Skills" section and save the agent. The default agent uses installed, enabled skills automatically.
"No skills found."	Clear the search, or check the other scope.

Create or upload a workspace skill

Purpose

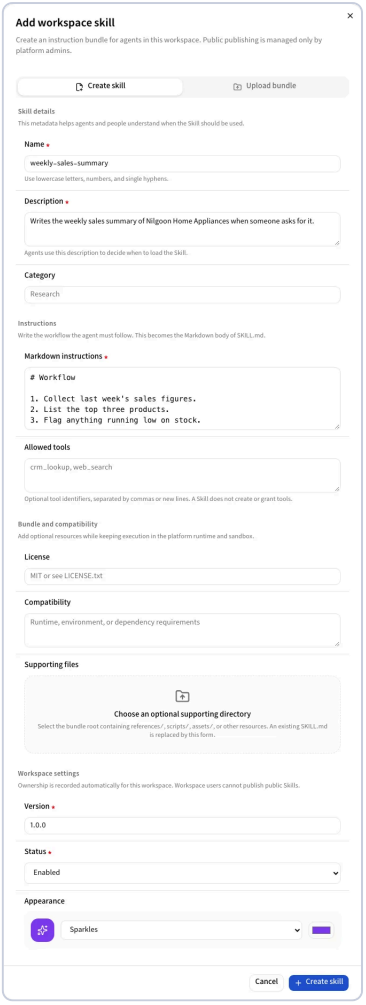
Kian wants the weekly summary to follow Nilgoon’s own format, and no ready-made skill does. Write your own skill (instructions plus optional files) for the agents of this workspace, or upload a ready-made skill folder.

Before you start

Select the workspace that should own the skill. Prepare a name and the instructions, or a folder that contains a `SKILL.md` file at its root. Skills created here are available within this workspace. Skills only give instructions. They never grant tools.

Steps

1. Open “Plugins”, select the “Skills” tab, switch “Skill scope” to workspace skills and select “Add skill”. The window “Add workspace skill” has two tabs: “Create skill” and “Upload bundle”.
2. In “Create skill”, under “Skill details” fill in:
   - “Name”: lowercase letters, numbers and single hyphens, up to 64 characters.
   - “Description”: what the skill does and which requests should trigger it, up to 1,024 characters. Agents use it to decide when to load the skill.
   - “Category” (optional, up to 100 characters).
3. Under “Instructions”, write the “Markdown instructions” (required, up to 900,000 characters). They become the body of `SKILL.md`. Optionally list “Allowed tools” (identifiers separated by commas or new lines). This does not create or grant tools.
4. Under “Bundle and compatibility”, optionally add “License” (up to 200 characters), “Compatibility” (up to 500 characters) and “Supporting files”: choose a folder with extra files such as references or scripts. A `SKILL.md` inside that folder is replaced by the form, and at most 99 supporting files are kept.
5. Instead of the form, choose “Upload bundle” and “Choose Skill directory”. Pick a complete folder with `SKILL.md` at its root. That file must start with valid metadata containing a name and a description, followed by non-empty instructions, and every file must contain at least one byte. A bundle can have at most 100 files, 1.5 MB in total and 1 MB per file.
6. Under “Workspace settings” set the “Version” (up to 40 characters), the “Status” (“Enabled” or “Disabled”), and the “Skill icon” and “Skill color”. Ownership is recorded for the workspace automatically.
7. Select “Create skill” (or “Upload skill”). The skill’s page opens.
8. To publish a new version later, open the skill and select “Upload a new [name] version”. Keep the skill name unchanged and use a version different from the current one. The window suggests the next version number, asks for the complete replacement folder and ends with “Upload version”.



The Add workspace skill window with the Create skill form

Expected result

The skill is saved with workspace visibility and already added to the workspace. It is not public and grants no tool access. The default agent can use it automatically. To let a custom agent use it, switch it on in that agent’s “Skills” section.

Troubleshooting

Problem	What to do
The upload button is disabled	Choose a skill folder first. The message “Choose a Skill bundle directory.” appears otherwise.
An error says a skill can include up to 99 supporting files	Remove some files from the supporting folder.
The name is rejected	Use only lowercase letters, numbers and single hyphens. Choose another name if Agentum reports that the name already exists.
A file is refused	Check the file count and size limits, that `SKILL.md` is at the folder root with valid metadata (a name and a description) followed by non-empty instructions, and that no file is empty. A failed upload saves nothing.
“Cancel”	Closes the window and clears the form.

Projects, files and sites

Parisa Nazari · Freelance graphic designer

It is 6 pm when Sara sends Parisa a few lines about the autumn sale: a banner, three social posts and a small catalog page, all due tomorrow. Parisa starts a project called “Autumn campaign”, drops Sara’s note and the product photos into it, and works with her agent in chats that stay inside the project. Neda, who answers customers, finds the same files there when someone asks about the sale prices. Parisa asks for the catalog page, watches it appear in a live preview, and points at the banner to make it a little bigger. By bedtime everything is in one place.

In this chapter you will learn about “Create a project”, “Work with project files, chats and usage”, “Browse, preview and download files in the Library”, “Create and manage a site” and “Preview a site and request targeted edits”.

Create a project

Purpose

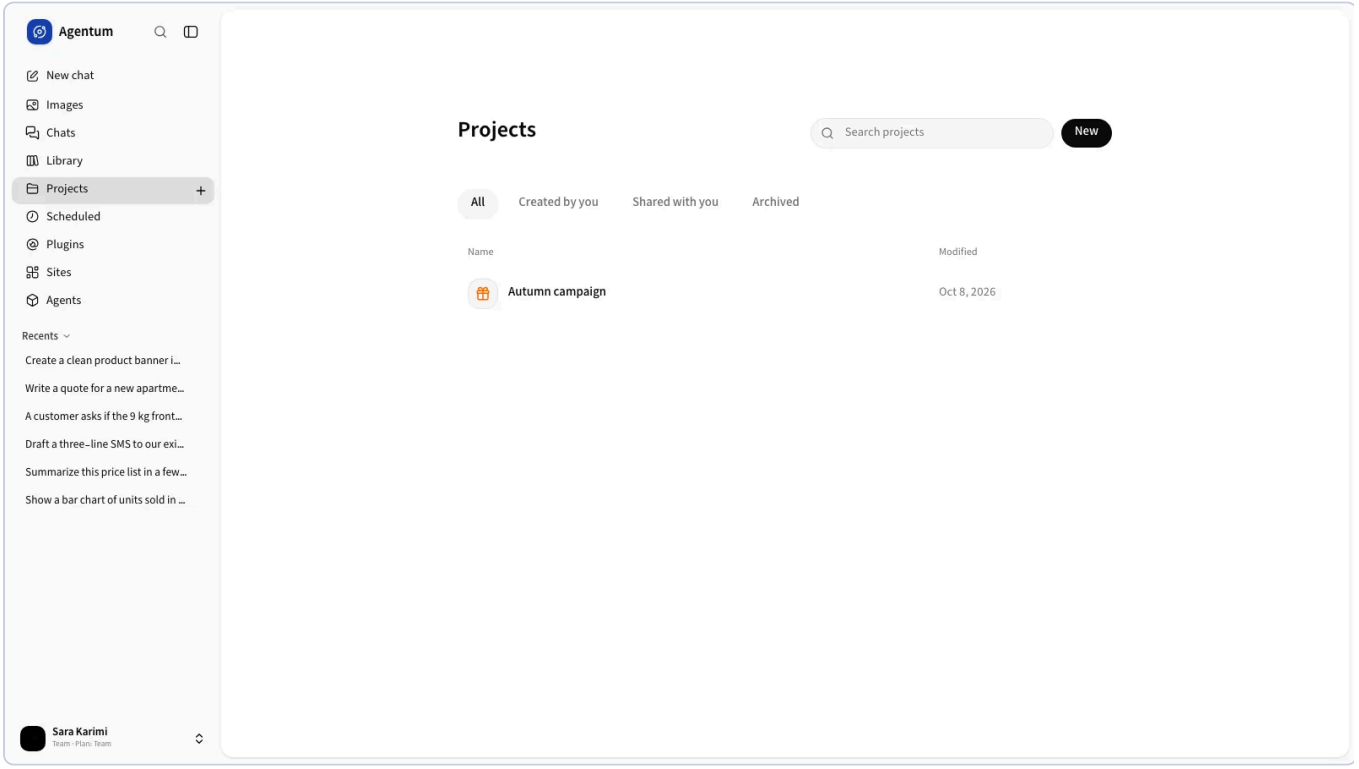
Parisa’s autumn campaign has a banner, three posts and a catalog page, and the chats and files for it end up scattered. A project keeps the chats, files and instructions together, and one list lets you find and manage all your projects.

Before you start

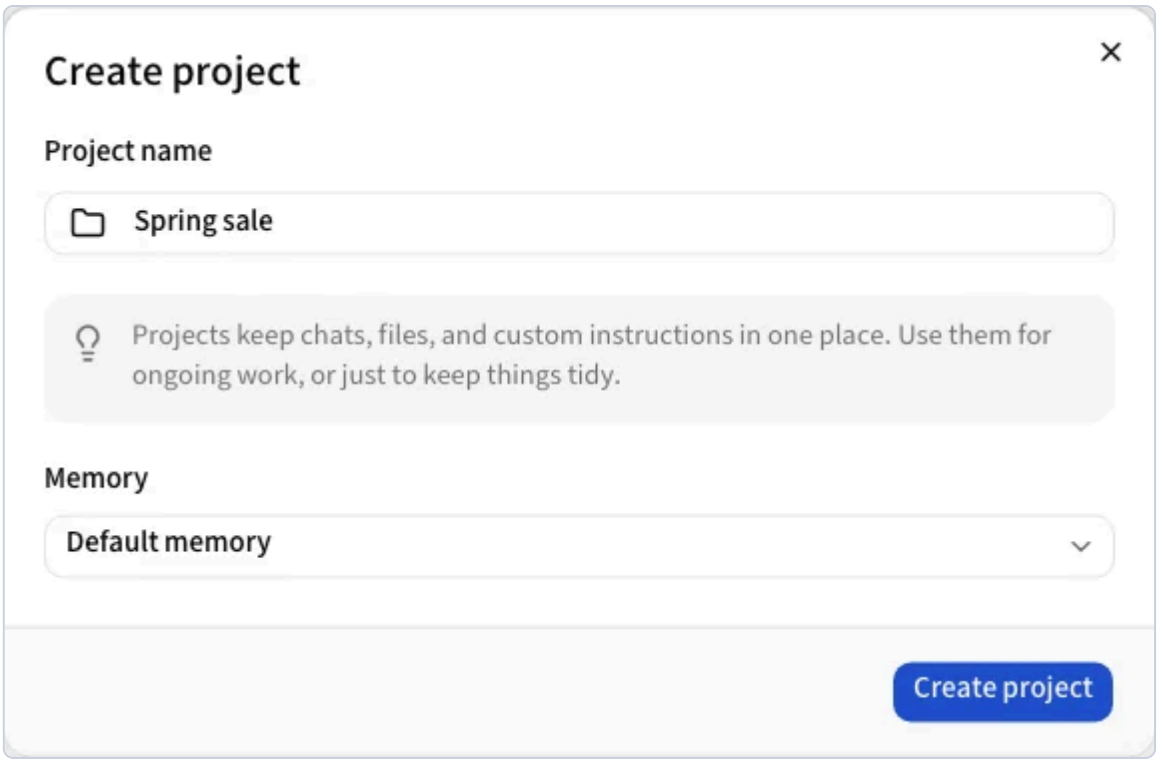
Sign in, select the workspace that will own the project, and make sure you have permission to manage projects (creating, editing and deleting projects need it). Projects belong to a workspace and appear in its Projects list.

Steps

1. Open **Projects** in the sidebar and select **New**. The **Create project** dialog opens.
2. Type a **Project name**. A name is required and can have up to 120 characters. To pick an icon, select the icon at the left of the name field (**Choose project icon**), choose one of 27 icons and one of 8 colors, then select **Done**.
3. Under **Memory**, choose **Default memory** (the project can use memory from chats outside it, and the other way round) or **Project-only memory** (the project can only use its own memory and stays isolated).
4. Select **Create project**. The new project opens right away.
5. To add guidance, open the project, select its name, its icon or **Project options**, then **Project settings**. **Instructions** (up to 12,000 characters) are saved, but currently do not affect chat replies. Include essential guidance in your message. Select **Save** after any change. The same dialog lets you change the name, icon and memory choice, and shows **Library access** as **Enabled** (it cannot be changed here).
6. Back on the **Projects** list, use **Search projects** to find a project by name. The filters **All** and **Archived** narrow the list. **Created by you** does not yet filter by creator, and **Shared with you** always shows an empty list for now. Each row shows the project name and its last change date.
7. To rename, re-style or delete a project from the list, point at its row, select its options button and choose **Project settings** or **Delete project**. **Delete project** asks you to confirm. The **Unpin project** and **Share** entries are shown but unavailable.



The Projects list with project rows, filters and search



The Create project dialog

Expected result

The project appears in the Projects list of the active workspace and opens as its own page with a box for starting a chat in it and the tabs **Chats**, **Sources**, **Knowledge** and **Usage**. Chats started there can use the project's files. The **Knowledge** tab holds the project's own knowledge base (see "Create and manage a knowledge base").

Troubleshooting

Problem	What to do
Create project is disabled	The project name is empty. Type a name.
An action is denied or a button is unavailable	You may lack permission to manage projects. Ask a workspace administrator.
Saving or creating fails	The dialog stays open and shows the error. Correct the name or instructions and try again.
Delete project in the list or in the project settings	In the list it asks you to confirm. In the project settings it deletes right away. Regular chats remain outside the deleted project. The project's own knowledge base on the **Knowledge** tab is deleted with it. Work conversations tied to that project can no longer run.
The list says **No projects found.**	Clear the search box and choose **All**. If you still see nothing, no project exists in this workspace yet.
I cannot share a project	Sharing is not available yet: **Share** and **Share project** are shown but turned off.

Work with project files, chats and usage

Purpose

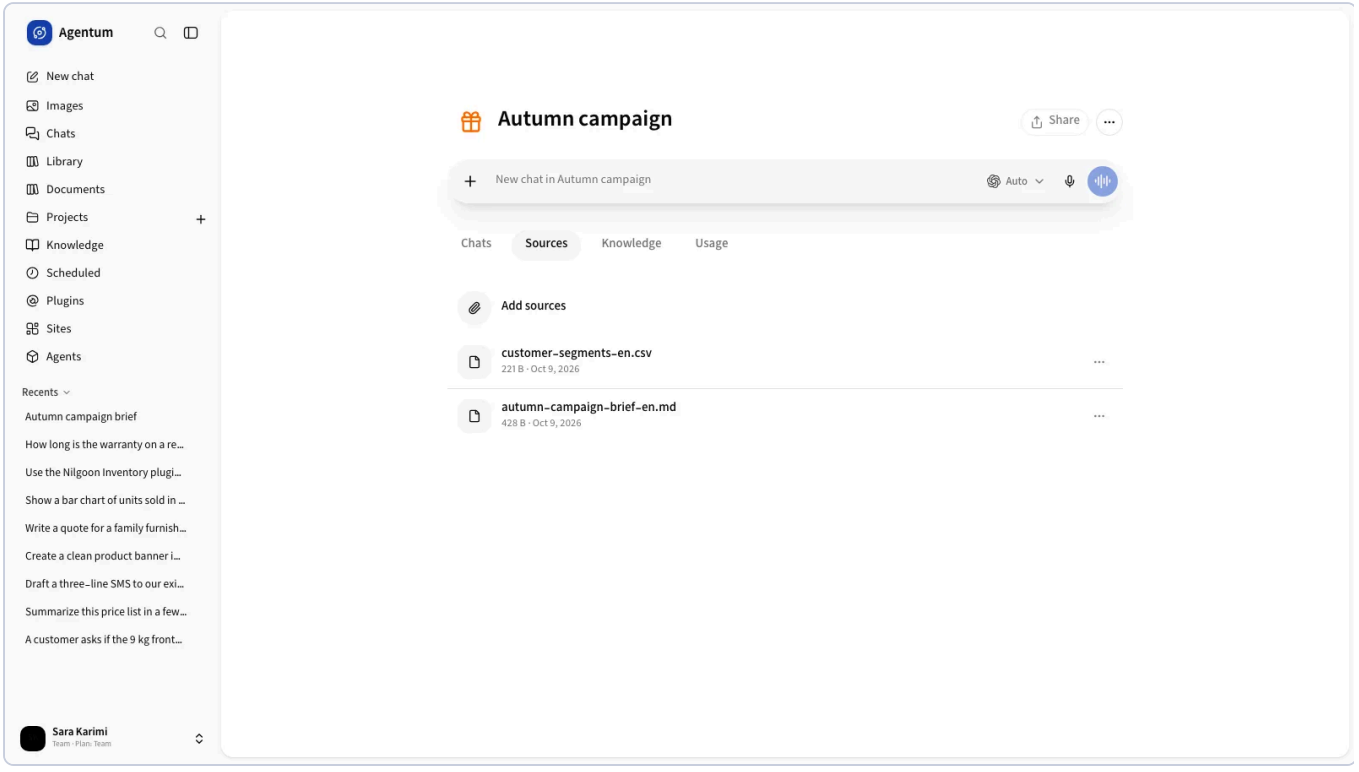
Neda wants the delivery rules, the questions customers keep asking and the chats about them in one place. Here you add shared files to a project, open or delete its chats, attach knowledge and check how much the project has used.

Before you start

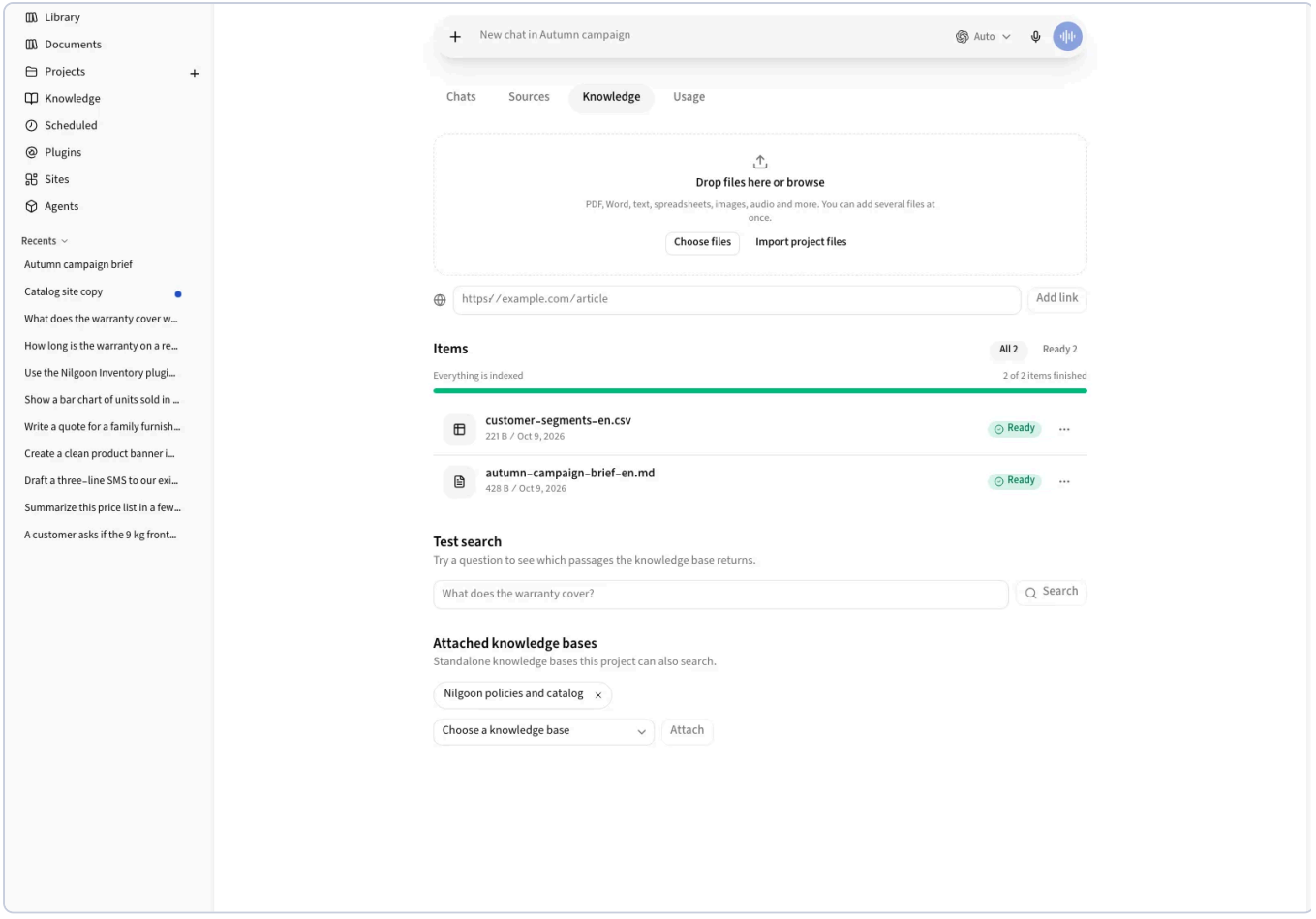
Open an existing project in the correct workspace (see "Create a project"). You can add one file at a time, from 1 byte up to 25 MB, subject to your plan's upload and storage limits.

Steps

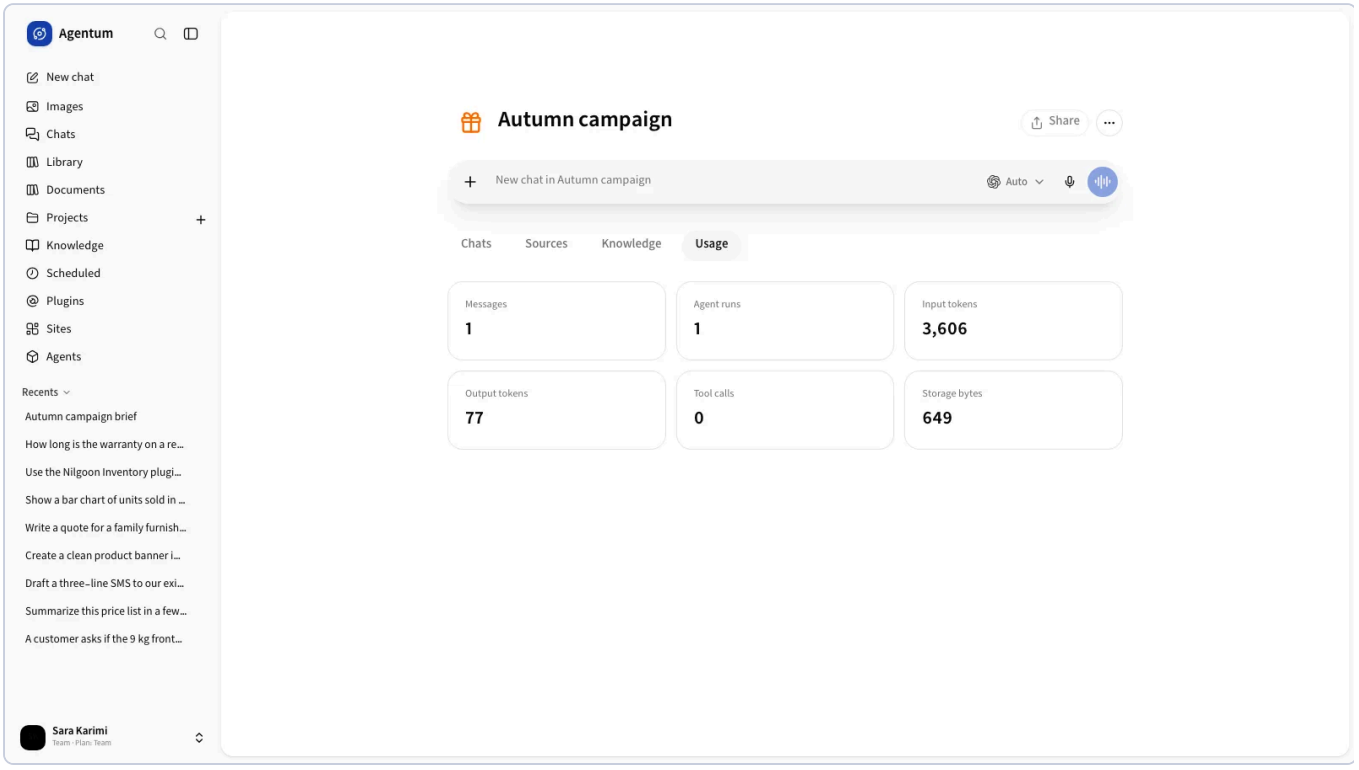
1. Open **Projects** and select the project. The page has four tabs: **Chats**, **Sources**, **Knowledge** and **Usage**.
2. Select **Sources**, then **Add sources** and choose one file from your device. When the upload ends, the file appears in the list with its size and date. Files added here are available across the whole project.
3. To remove a source, open its options button (**Options for [file name]**) and select **Remove source**. It is removed at once, without a confirmation.
4. To start a chat in the project, type in the box at the top (**New chat in [project name]**), attach files with **Add files** if you want, optionally pick a model, use dictation to enter the request and choose a reasoning effort when the selected model supports it (see “Dictate a message” and “Choose a chat model and thinking level”), and select **Create chat**.
5. Select **Chats** to see the project’s chats. Open a chat by selecting its row, or use its options menu for **Open chat** and **Delete chat**. **Delete chat** acts at once, without a confirmation.
6. Select **Knowledge** to see the project’s own knowledge base, which the whole workspace can always see. Add files or a web page there (**Choose files**, or **Add a web page** and **Add link**), or select **Import project files** to index the files on the **Sources** tab, then try a question under **Test search**. Under **Attached knowledge bases**, choose **Choose a knowledge base** and select **Attach** to let the project search another knowledge base too; the remove button (**Remove [name]**) detaches it. To ask about a knowledge base in a new chat, type **@** in the box at the top. See “Create and manage a knowledge base” and “Add files, links and recordings to a knowledge base”.
7. Select **Usage** to see six counters for this project: **Messages**, **Agent runs**, **Input tokens**, **Output tokens**, **Tool calls** and **Storage bytes**.
8. Use the back arrow at the top to return to the **Projects** list.



The Sources tab of a project with its files



The Knowledge tab of a project with its attached knowledge bases



The Usage tab of a project

Expected result

Sources are stored with the project and listed with name, size and date. Each tab shows only this project's content.

Troubleshooting

Problem	What to do
The upload fails	The page shows an error. Check that the file is not empty and is 25 MB or smaller, that your plan allows uploads, and that it still has storage left (**Settings**, **Storage**), then try again. Look at the list before retrying, in case the file was added.
A tab shows an error with **Retry**	Select **Retry** to reload that tab.
A file or chat list is empty	The Sources tab says to add files that should be available across the project, and the Chats tab says to start a new chat in this project. Both are normal for a new project.
I removed a file or chat by mistake	Removing a source or deleting a chat has no undo. Add the file again, or start a new chat.

Browse, preview and download files in the Library

Purpose

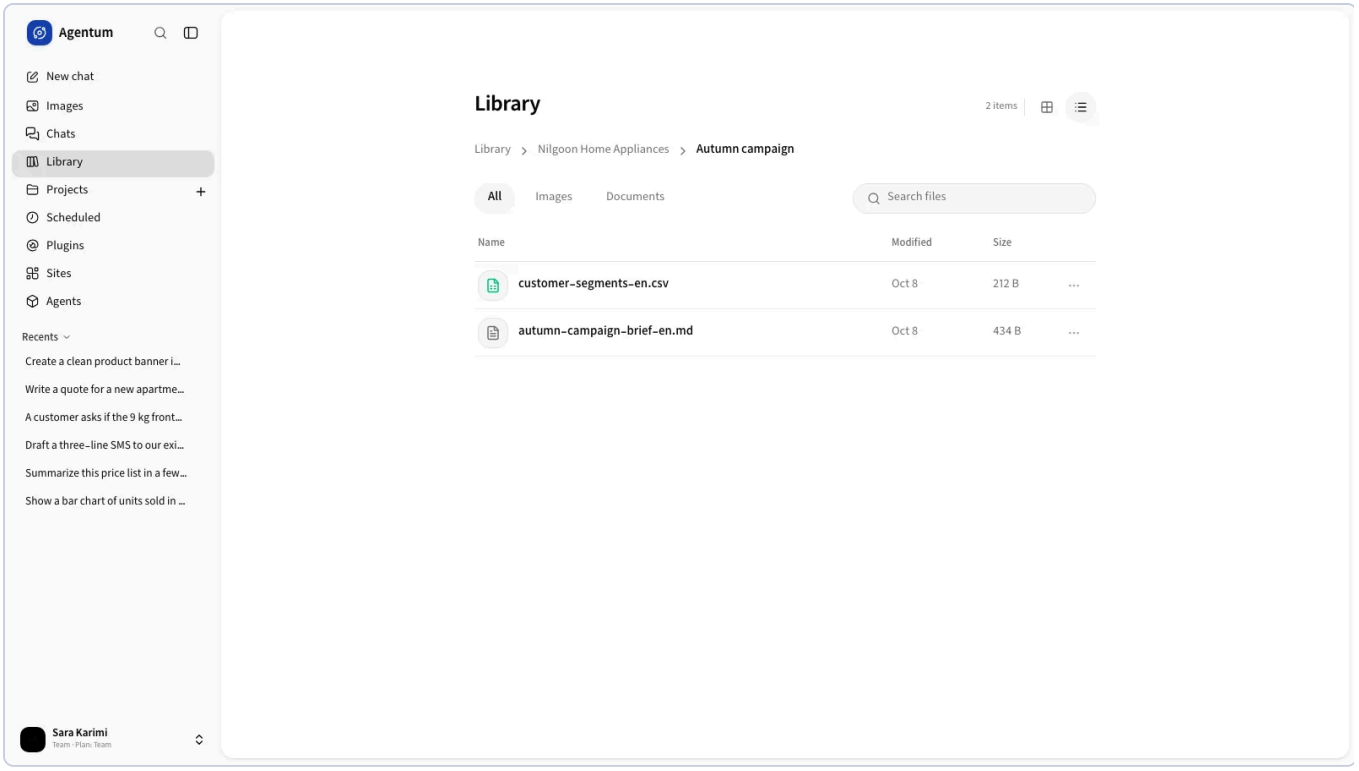
Parisa remembers uploading last week's banner but not where she put it. The Library gathers your personal files and your project files in one place, so you can find them, preview them and download a copy.

Before you start

Select the workspace that holds the files. Your own files and each project's files are kept in separate folders.

Steps

1. Open **Library** in the sidebar. You see a folder named after your workspace. Select it.
2. Inside the workspace folder you find **My files** (marked **Private folder**, with your personal files that do not belong to a project, whether you uploaded them or agents created them) and one folder for each project, holding project uploads, attachments from the project's chats and files agents created in the project. Select a folder to open it. The path at the top (**Library** > workspace > folder) shows where you are; select any part of it to go back.
3. In the workspace folder, use **Search projects** to find a project folder. In **My files** or a project folder, use **Search files** and the **All**, **Images** and **Documents** tabs to narrow the list.
4. Switch between **List view** and **Grid view** with the two buttons at the top right. The list shows **Name**, **Modified** and **Size** for each file. The counter next to the buttons shows how many items are listed.
5. Select a file (or open its options button, **Actions for [file name]**, and choose **Preview**) to look at it. When several files are listed you can move between them in the preview.
6. To save a copy, open the file's options button and choose **Download**, or use the download button in the preview. Your browser then saves the file.



A project folder in the Library in list view

Expected result

The file opens in a preview or is saved to your device. The Library is for browsing and downloading only: it has no controls to upload, rename, move or delete files. Add files to a project from its **Sources** tab, and attach files to a chat from the chat box.

Troubleshooting

Problem	What to do
The list is empty	A new folder says **This folder is empty**. In **My files**, a personal file appears here once you upload one or an agent creates one (files attached in a project's chats appear in that project's folder); for a project folder, upload files from the project page. If you searched or picked a tab, the message is **No files found**: clear the search and choose **All**.
Loading fails	Select **Retry** next to the error.
A download fails	The error appears at the top of the list. Try the download again.
A file does not preview	Some file types cannot be shown in the preview. Download the file and open it on your device.

Create and manage a site

Purpose

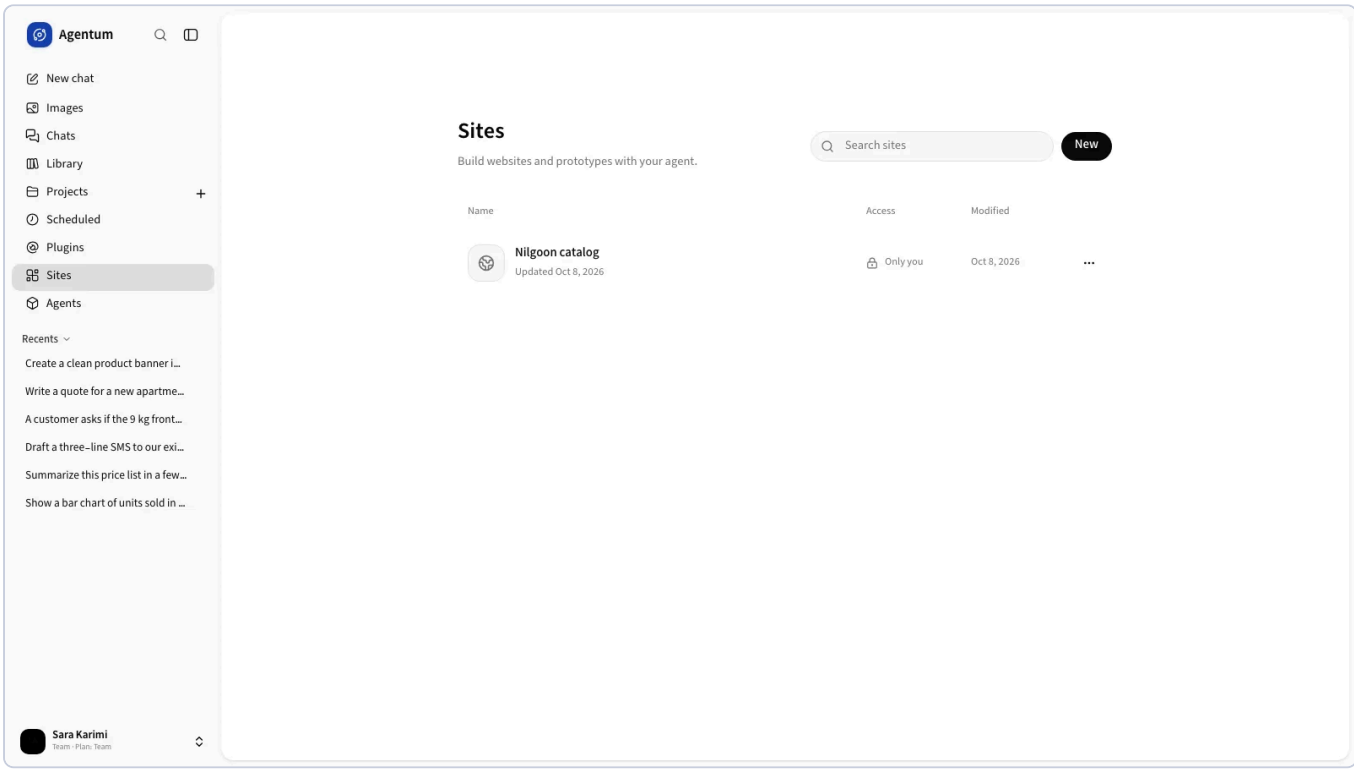
Parisa needs a small catalog page for the autumn sale, and she would rather describe it than code it. Create a site, tell your agent in its chat what you want, and manage all your sites from one list.

Before you start

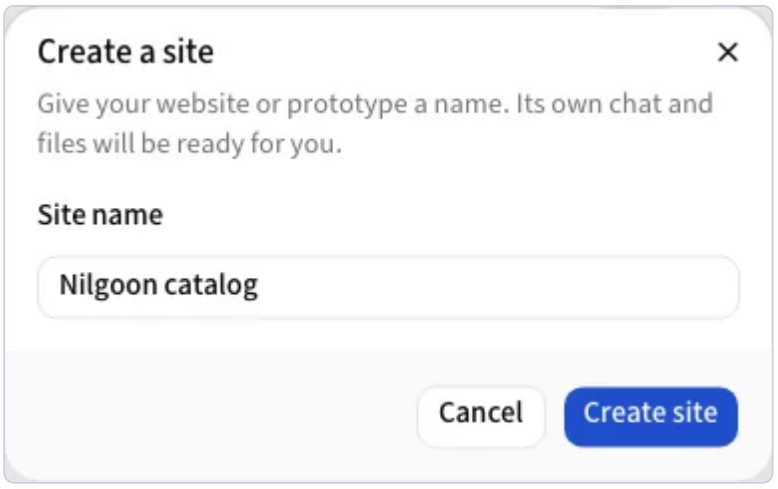
Sign in and select the workspace where the site should live. Sites are private: the list shows access as **Only you**.

Steps

1. Open **Sites** in the sidebar and select **New**. The **Create a site** dialog opens.
2. Type the **Site name** (1 to 120 characters; the field cannot be empty) and select **Create site**.
3. The site's chat opens (**What would you like to build?**). Describe your website or prototype in the box (**Describe your site or the next change…**) and send it. Your files and the live preview appear as the agent builds.
4. Go back to **Sites** to see all sites with their **Name**, **Access** and **Modified** columns. Use **Search sites** to find one by name.
5. To work with an existing site, select its options button (**Options for [site name]**). The menu has **Open chat**, **Live preview**, **Visit site**, **Rename** and **Delete site**.
6. For **Rename**, type the new name and select **Save**. For **Delete site**, read the warning and select **Delete site** to confirm, or **Cancel** to keep it.



The Sites list



The Create a site dialog

Expected result

The new site opens in its own chat and appears in the Sites list. Deleting a site removes the site and its preview, and you can no longer open or edit its files.

Troubleshooting

Problem	What to do
Create site or **Save** is disabled	The name is empty. Type a name.
Could not save your changes. Please try again.	The dialog stays open. Check your connection and select the button again.
The list says **No sites found**	Your search matched nothing. Try a different name. With no search, **Your next idea starts here** means no site exists yet.
The site is not what I asked for	Creating a site only creates its chat and files. Describe the pages you want in the chat, then check the result in the live preview.

Preview a site and request targeted edits

Purpose

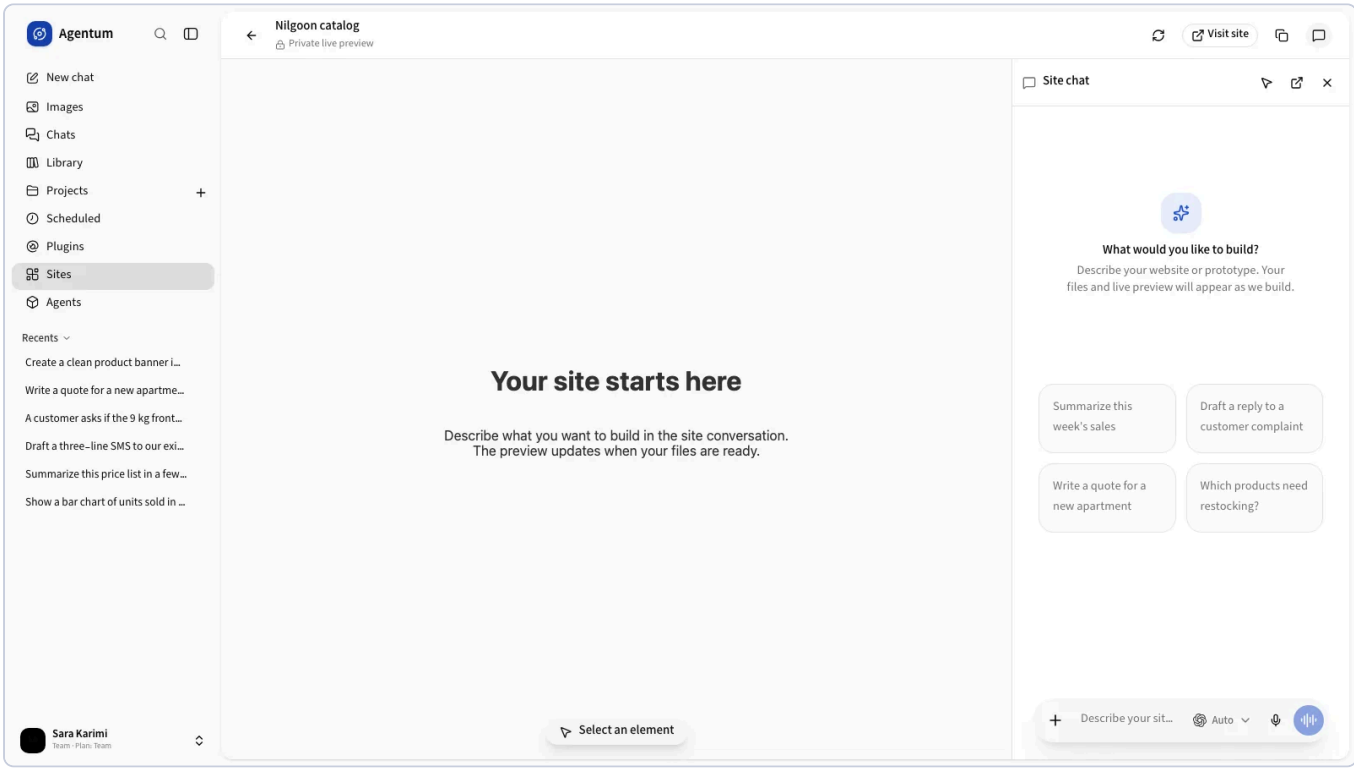
Parisa wants the banner on her catalog page a little bigger, but describing “the third box from the top” is clumsy. Watch your site as it is built, open or copy its address, and point at the part of the page you mean to ask for a change there.

Before you start

Create a site first (see Create and manage a site). The preview shows content once your agent has built some pages.

Steps

1. Open the preview in one of two ways: from **Sites**, open the site's options and choose **Live preview**, or from inside the site's chat select **Preview site** at the top.
2. The preview page shows **Private live preview** under the site name. It updates by itself when your agent finishes an edit. Select **Refresh preview** to reload it yourself.
3. Select **Visit site** to open the site in a new tab. Select **Copy site link** to copy its address; the button then reads **Copied**.
4. Select **Site chat** to open the chat panel next to the preview. Type your request there.
5. To point at something, select **Select an element** (at the bottom of the preview or in the chat panel header), then click the part of the page you mean. The chat panel opens with a **Selected** card showing it, and your next message is sent with that part as context.
6. To stop picking, select **Cancel selection** or press Esc. To drop a picked element, select **Remove selected element**.
7. Select **Back to site chat** to return to the full chat. On a phone, the chat panel covers the preview; close it with **Close chat**.



The starting page of a new site in the live preview, with the chat panel open

Expected result

The preview shows your current site and refreshes as edits finish. Copying the link does not publish the site or give anyone else access. The **Visit site** page shows only the site, without the editing controls.

Troubleshooting

Problem	What to do
Loading preview... stays on screen	If loading fails and **Try again** appears, select it. Otherwise use **Refresh preview** once it becomes available. A site your agent has not built yet can look empty.
Could not load the preview. Refresh to try again.	Select **Refresh preview**. If it keeps failing, make sure you are still signed in to the right workspace.
Could not copy the link. You can copy the address from your browser.	Select **Visit site**, then copy the address from the new tab's address bar.
I cannot select an element	The button is turned off until the preview has loaded.

Knowledge and documents

Neda Rahimi · Office and customer support

At 9:40 on a Tuesday, a customer asks Neda whether the microwave she bought three weeks ago can still be returned. The answer is somewhere in the shop's policies: the return terms in a PDF, the delivery rules on a web page and the product catalog in a spreadsheet. So she creates a knowledge base, drops all three in and asks her question in a chat. The answer comes back with numbered sources, and one click opens the exact page of the return terms. Across town, Parisa turns Sara's few lines about the autumn sale into a proper brief on a Page, with the assistant drafting the sections she asks for.

In this chapter you will learn about "Create and manage a knowledge base", "Add files, links and recordings to a knowledge base", "Ask questions about your knowledge bases" and "Write a Page and ask AI about it".

Create and manage a knowledge base

Purpose

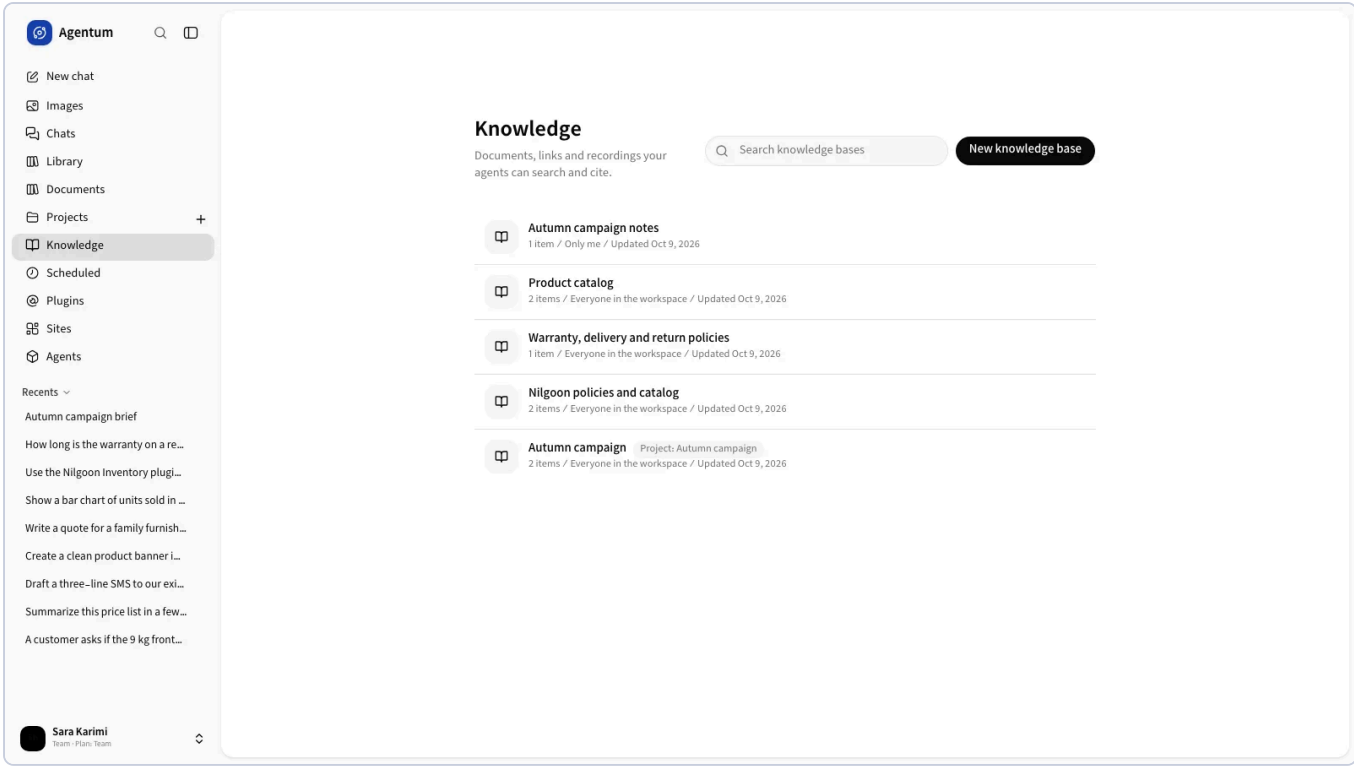
Neda wants her answers about warranty and delivery to come from the shop's own policies, not from memory. A knowledge base is a shelf of documents, links and recordings that Agentum can search and quote; this section shows how to create one, keep it tidy and see how much of your plan it uses.

Before you start

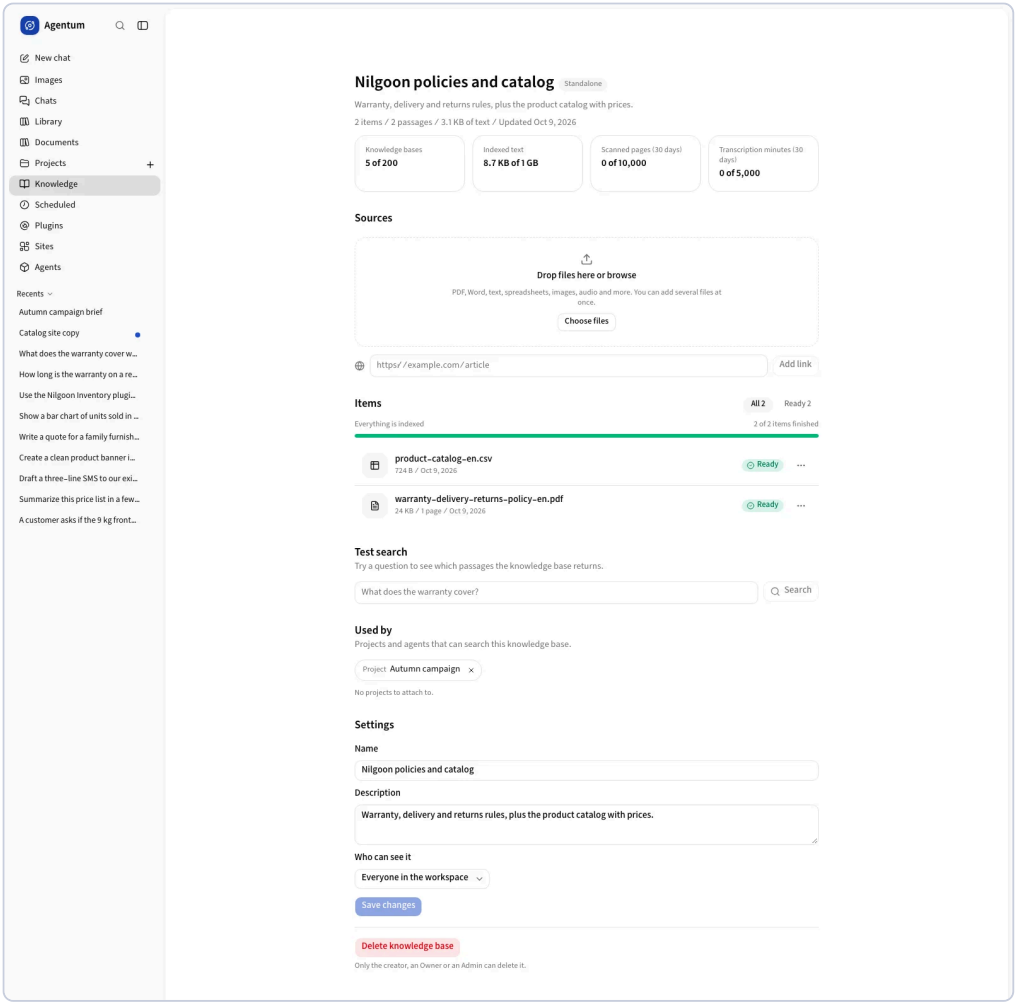
Sign in and select the workspace that will own the knowledge base. A knowledge base belongs to a workspace. Each plan limits how many knowledge bases you can have, how many items each one holds and how much text is indexed (see "Plan limits" below). Creating, changing and deleting knowledge bases needs permission to manage projects; with permission to use projects you can only view them and try **Test search**.

Steps

1. Open **Knowledge** in the sidebar. The page lists the knowledge bases you can see. Each row shows the name, how many items it holds, who can see it (**Only me** or **Everyone in the workspace**) and when it last changed. A knowledge base that belongs to a project also carries a **Project: [name]** badge. Use **Search knowledge bases** to find one by name. While the list loads you see placeholder rows. If it cannot load, a red message explains why, with a **Retry** button.
2. Select **New knowledge base**. In the dialog, type a **Name** (required, up to 120 characters) and, if you like, a **Description** (up to 1,000 characters, for example “Warranty, delivery and return policies”). Under **Who can see it**, choose **Only me** (only you can find and use it) or **Everyone in the workspace**. Select **Create**. **Create** stays disabled until the name is filled in. If creating fails, the dialog stays open and shows the reason.
3. The new knowledge base opens. The top of the page shows its name, a **Standalone** badge, the description and a summary line with the number of items, passages and text size and the date of the last update. Under it, four tiles show what your workspace has used of its plan: **Knowledge bases**, **Indexed text**, **Scanned pages (30 days)** and **Transcription minutes (30 days)**, each as “[used] of [limit]”, where the limit reads “unlimited” on plans without one.
4. Add the material the knowledge base should know. The next section, “Add files, links and recordings to a knowledge base”, walks through the **Sources** and **Items** parts of this page.
5. Before relying on it, try **Test search**. Type a question in **Test question** (for example “What does the warranty cover?”) and select **Search**. The knowledge base shows the passages it would give an agent, each with a number, the source name, the page (**Page [n]**) or the time (**At [time]**) and a **Relevance** score. If nothing fits, it says **No passages matched.** A note may appear above the results when the search could only use keywords, for example **Meaning-based search was unavailable; only keywords were used.**
6. Under **Settings**, change the **Name**, the **Description** or **Who can see it** and select **Save changes**. **Saved** confirms it. **Save changes** is enabled only when something changed.
7. Under **Used by**, connect the knowledge base to your projects. Choose a project in **Choose a project** and select **Attach**. A chip appears for each attached project, with a remove button (**Remove [name]**). Chats in an attached project can search this knowledge base without anyone mentioning it. If there is no project left to attach, the section says **No projects to attach to.** Until a project is attached, it says **Not attached to anything yet.**
8. To use a knowledge base from a project’s own page, open the project and choose its **Knowledge** tab (the tabs are **Chats**, **Sources**, **Knowledge** and **Usage**). The tab shows the project’s own knowledge base, with the same adding, items and test search tools, and an **Attached knowledge bases** section. Choose a knowledge base in **Choose a knowledge base** and select **Attach** to let the project search it too. Remove a chip to detach it. Files you add to the project’s **Sources** are added to the project’s knowledge base automatically. A project’s knowledge base is always visible to the whole workspace, its name follows the project’s name, and you cannot delete it separately: it goes away when the project is deleted.
9. To delete a standalone knowledge base, open it, scroll to **Settings** and select **Delete knowledge base**. Confirm **Delete this knowledge base?** with **Delete**. All its items and indexed text are removed; chats that cited it keep their messages. Only the creator, an Owner or an Admin can delete it.



The Knowledge page listing the shop’s knowledge bases



A knowledge base page with usage tiles, sources, items and settings

Plan limits

Plan	Knowledge bases	Items per knowledge base	Indexed text	Scanned pages per 30 days	Transcription minutes per 30 days
Free	3	100	5 MB	50	30
Go	10	1,000	50 MB	500	300
Plus	50	10,000	200 MB	3,000	1,500
Pro	Unlimited	50,000	2 GB	20,000	10,000
Team	200	20,000	1 GB	10,000	5,000
Organization	Unlimited	100,000	5 GB	50,000	25,000

The number of knowledge bases and the indexed text are counted across the whole workspace. Scanned pages and transcription minutes are counted over the last 30 days.

A file can be uploaded up to 25 MB and a recording up to 300 MB (100 MB on Free), but only images up to 20 MB and recordings up to 25 MB can be read.

Expected result

The knowledge base appears in the **Knowledge** list with the visibility you chose. Its page shows your sources, the state of every item and the plan tiles, **Test search** returns passages from what you added, and the projects you attached can search it in their chats.

Troubleshooting

Problem	What to do
The list says **No knowledge bases yet**	Nothing has been created in this workspace, or nothing visible to you. Select **New knowledge base**. A private knowledge base made by a colleague is not shown to you.
The message “This workspace has reached its plan’s limit on knowledge bases.” appears when creating	Your plan allows no more knowledge bases. Delete one you no longer need, or choose a larger plan.
Create is disabled	The name is empty. Type a name.
Name and **Who can see it** cannot be changed in **Settings**	The knowledge base belongs to a project. Its name follows the project and it is always visible to the workspace. Only the description can be edited.
Delete knowledge base is missing	A project’s knowledge base is deleted with its project.
Deleting is refused with “You cannot change this knowledge base.”	Only the creator, an Owner or an Admin can delete a knowledge base.
Test search shows **No passages matched.**	Check that the items are **Ready**, and try the words your documents use. Items that are still **Waiting** or **Processing** cannot be searched yet.
The knowledge base is not found, or a link to it fails	It may be private to its creator, or it was deleted. Ask the creator to set **Who can see it** to **Everyone in the workspace**.
Attaching or removing a project fails and shows a red message	Reload the page and try again. The project may have been deleted.

Add files, links and recordings to a knowledge base

Purpose

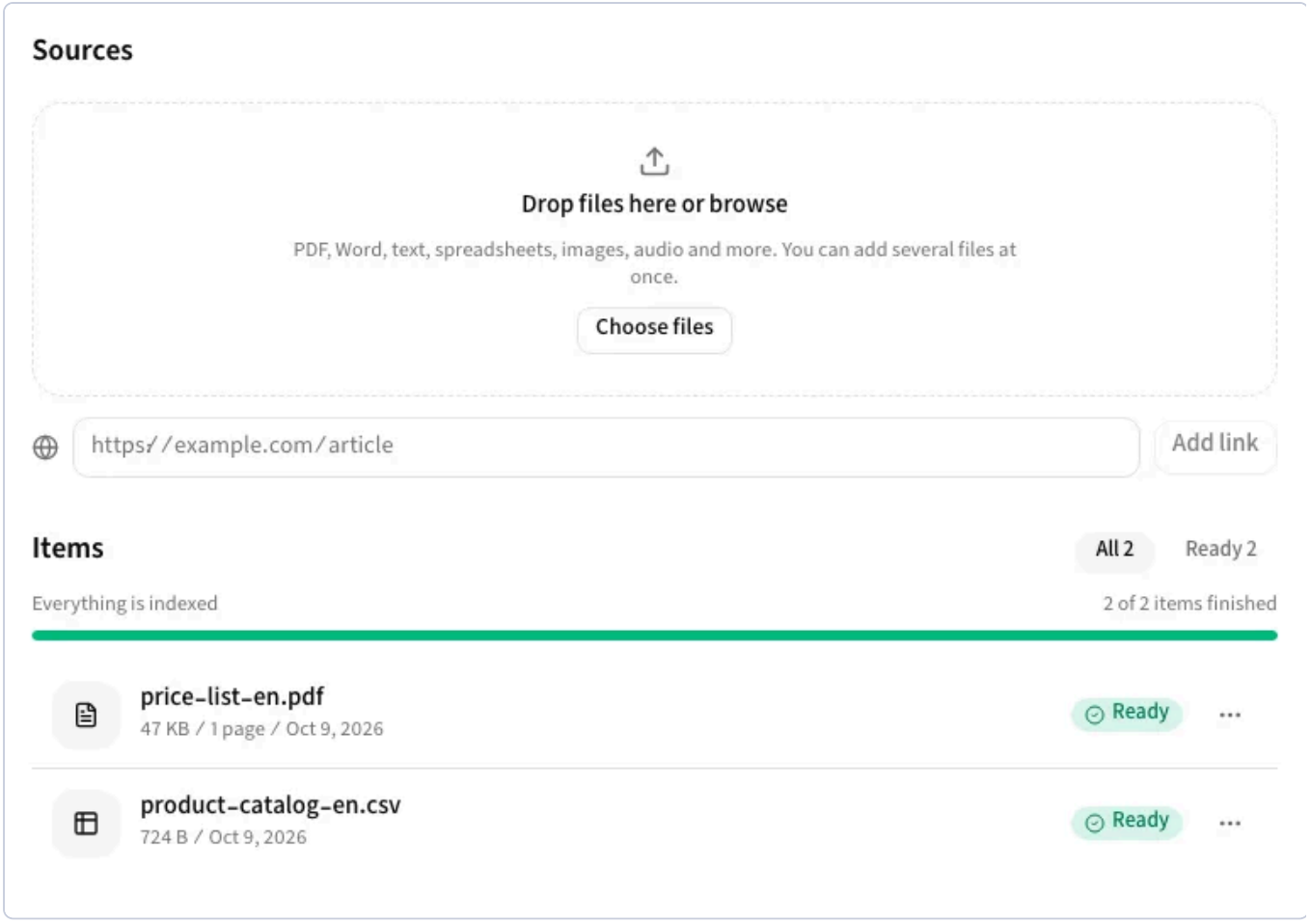
The return terms are in a PDF, the delivery rules are on a web page and the product catalog is a spreadsheet. Neda wants all of it in one place without retyping, and this section shows how to add each kind of source and follow it until it is ready to be searched.

Before you start

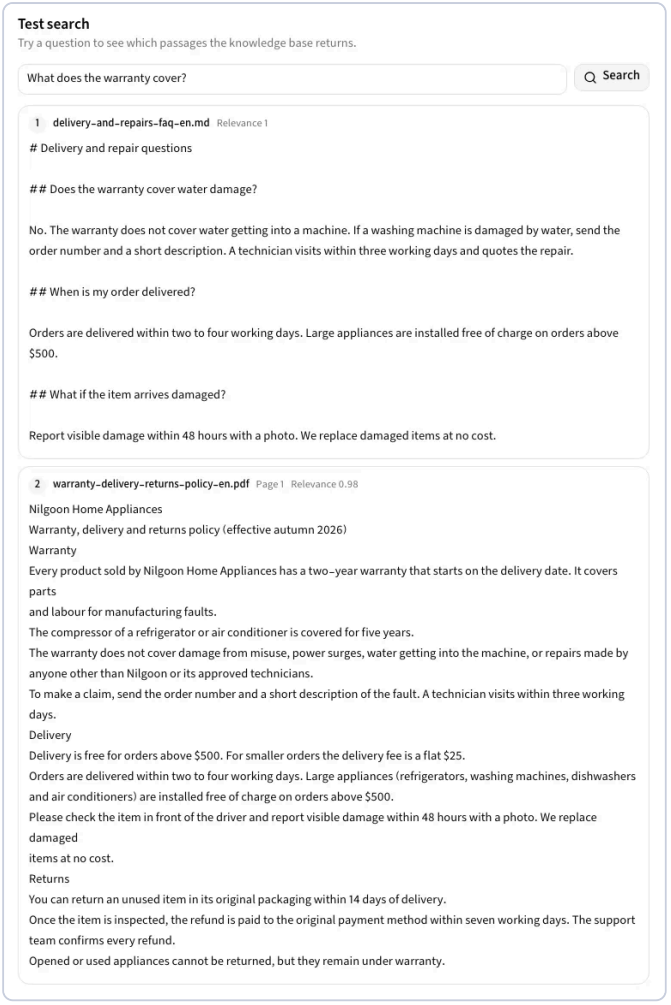
Open a knowledge base (see “Create and manage a knowledge base”), or a project’s **Knowledge** tab. You need permission to manage projects to add or remove items. Check the limits of your plan: they cap the number of items, the indexed text, the scanned pages and the transcription minutes.

Steps

1. In the **Sources** part of the page, drop one or more files onto the box **Drop files here or browse**, or select **Choose files** and pick them. You can add several files at once. The box accepts PDF, Word (.docx), text, Markdown and HTML files, spreadsheets (CSV, TSV, XLSX and JSON), images (PNG, JPEG, WebP, GIF) audio (MP3, M4A, WAV, OGG, OPUS, WEBM, FLAC, AAC) and video (MP4, MOV, MKV, AVI, M4V), whose sound is transcribed when possible. A file can be up to 25 MB. A recording can be uploaded up to 300 MB, but only recordings up to 25 MB can be transcribed, and images over 20 MB cannot be read. While files upload, the button reads **Uploading 1 file**; afterwards a note says how many files were added.
2. To add a web page, type its address in the **Add a web page** field (for example https://example.com/article) and select **Add link**. The address must be a public http or https address; otherwise the message **Enter a public http or https address.** appears. Addresses with a user name or password, and addresses on private or local networks, are added but then fail with **This address cannot be read.**
3. In a project's **Knowledge** tab, files that were already in the project before its knowledge base existed can be brought in with **Import project files**. A note says how many were queued (**[n] project files queued**). New files added to the project's **Sources** join the knowledge base by themselves.
4. Every file or link becomes an item in the **Items** list, with an icon for its kind, its name, size, page count or length in minutes, the date it was added and a status chip: **Waiting** (queued), **Processing**, **Ready** (searchable), **Failed** or **Skipped**. Spreadsheets are read row by row, scanned pages and images are read as pictures, and recordings are transcribed. The page updates by itself while anything is waiting or processing. Before anything is added, the list says **Nothing here yet. Add files or a link to get started.**
5. Above the list, a progress bar shows **[n] items are still being processed** and **[done] of [total] items finished**, with the number of failed items in brackets. When everything is finished it says **Everything is indexed**. The chips **All**, **Waiting**, **Processing**, **Ready**, **Failed** and **Skipped**, each with a count, filter the list; only statuses that currently have items are shown. If a filter has no items, the list says **No items with this status.**
6. For a failed or skipped item, a short red reason appears under its name (see the table below). To act on any item, open its options button (**Options for [name]**):
   - **View extracted text** (only for **Ready** items) opens **Extracted text**, the text the knowledge base actually indexed. Very long texts show only the first part and say so. If nothing was extracted, it says **No text was extracted.**
   - **Open original** opens the stored file; for a web page it reads **Open link**.
   - **Process again** reads the item once more, for example after a limit was lifted. It is disabled while the item is **Waiting** or **Processing**.
   - **Delete** asks **Delete this item?** and then removes the item and its indexed text.
7. When the list is long, more items load as you scroll. If they cannot load, you see **Items could not be loaded.** with **Retry**.



The Sources box, link field and items with their status



Test search returning passages from the shop’s policies

Expected result

Each source appears as an item that moves from **Waiting** to **Processing** to **Ready**. Ready items can be searched with **Test search** and are used when you ask about the knowledge base in a chat. Items that could not be read show a plain reason.

Troubleshooting

Problem	What to do
The red message “This file type is not supported.” appears	Only the file types listed in step 1 can be added. Convert the file, for example export a presentation to PDF.
An upload is refused as too large	Ordinary files can be up to 25 MB and recordings up to 300 MB. Split the file or compress it.
Item **Failed** with **This file is larger than your plan allows.**	The file is too large to read: images over 20 MB and recordings over 25 MB are not read, and a very large web page cannot be fetched. Use a smaller file.
A red message such as **This knowledge base has reached its plan’s limit on items.**, **This workspace has reached its plan’s limit on indexed text.** or **This file is larger than your plan allows.** appears when adding	Nothing was added. Delete items you no longer need, use a smaller file, or choose a larger plan.
Item **Failed** with **No readable text was found.**	The file has no text to index. If it is a scan, try a clearer copy.
Item **Failed** with **The text could not be extracted.**	Try **Process again**. If it fails again, re-save the file in another format.
Item **Failed** with **Reading the scanned pages failed.** or **Transcribing the recording failed.**	Choose **Process again**. If it keeps failing, the file may be damaged.
Item **Failed** with **Search indexing is unavailable right now.** or **Indexing failed. Try again.**	A temporary problem. Choose **Process again** a little later.
Item **Failed** with **The page could not be fetched.**	The site did not answer or refused. Check the address, then choose **Process again**.
Item **Failed** with **This address cannot be read.**	The address is not public (for example a private network address). Only public web pages can be added.
Item **Skipped** with **This file type is not supported.**, **Video files are not supported yet.** or **Scanned pages cannot be read right now.**	The item was not indexed. If a video is skipped, add its audio track as a recording instead.
Item with **The original file is missing.**	The stored file was removed. Delete the item and add the file again.
The knowledge base reached its item limit.	The knowledge base holds as many items as your plan allows. Delete items or choose a larger plan.

Problem	What to do
The workspace reached its indexed text limit.	The text of all your knowledge bases is at the plan limit. Delete items you no longer need or upgrade.
The monthly limit for scanned pages is used up. or **The monthly limit for transcription minutes is used up.**	These are counted over the last 30 days. Wait for the count to drop, or upgrade, then choose **Process again**.
The owner of this item is no longer available.	The person who added it has left the workspace. Delete the item and add it again.
Something went wrong while processing this item.	Choose **Process again**. If it persists, contact support.

Ask questions about your knowledge bases

Purpose

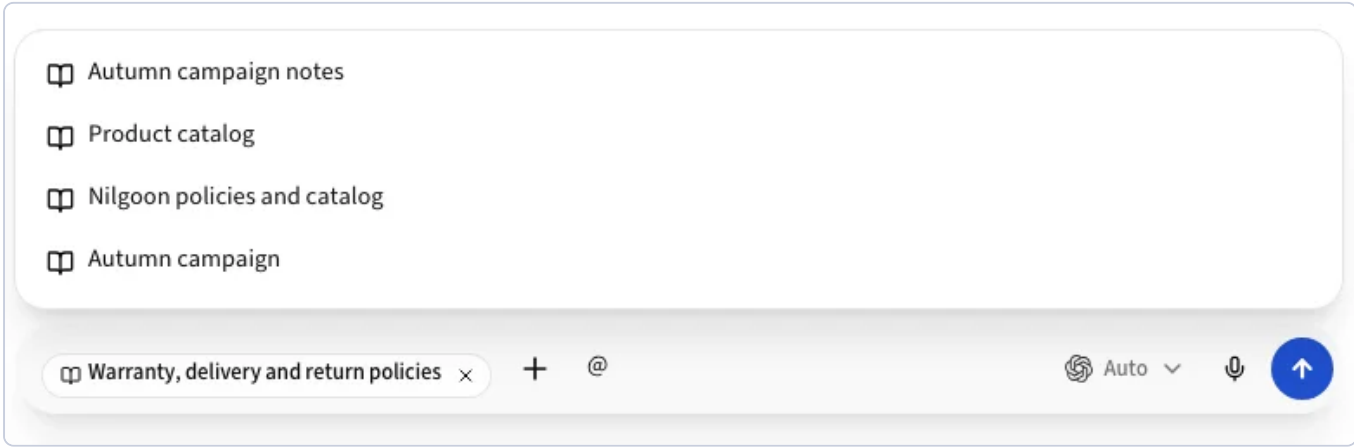
A customer asks Neda whether the microwave she bought three weeks ago can still be returned, and Neda does not want to guess or scroll through a PDF. Mention the knowledge base in your message and the answer comes back with numbered sources you can open, so you can check it before you reply.

Before you start

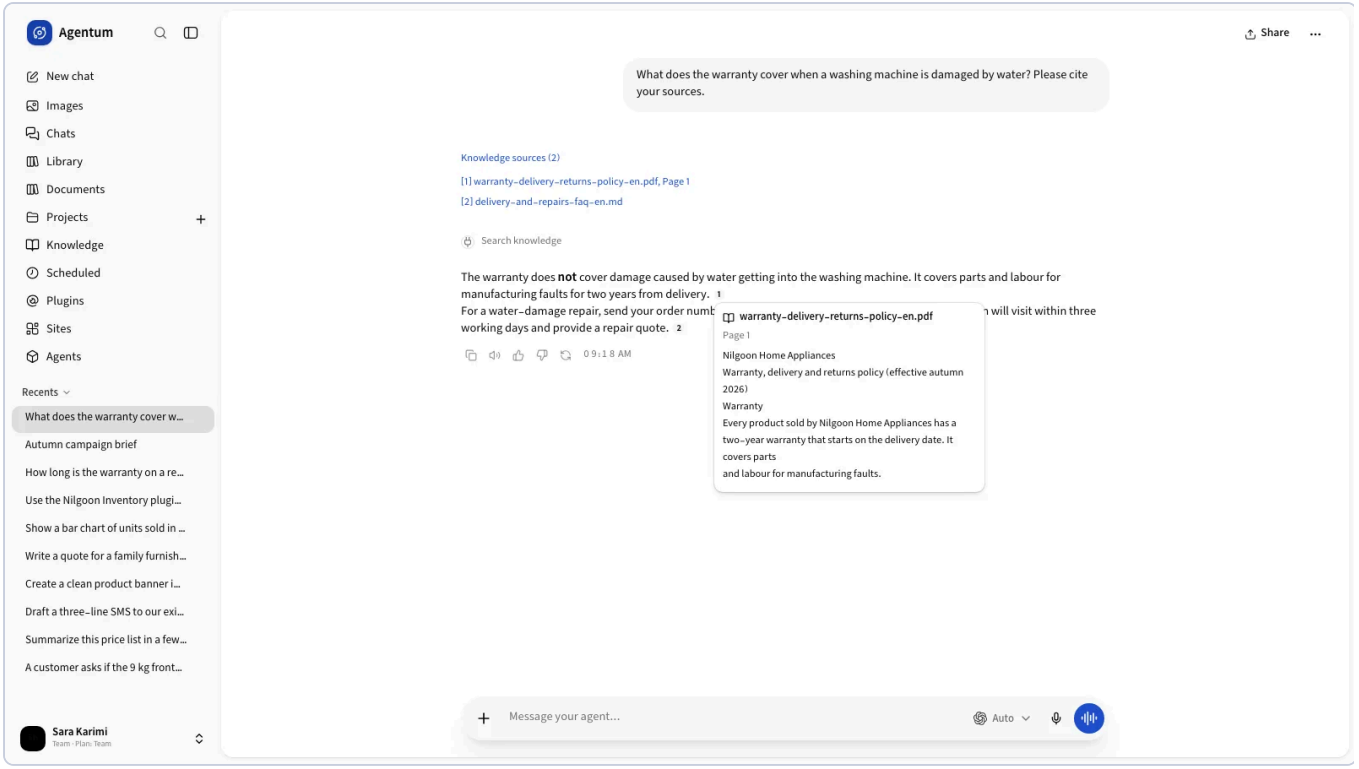
You need at least one knowledge base with **Ready** items (see “Add files, links and recordings to a knowledge base”). You can mention any knowledge base you are allowed to see: your private ones and the ones shared with the workspace.

Steps

1. Open a chat, the new-chat page or a project's chat box. In the message box, type **@**. A list **Knowledge bases** opens above the box. You can also select the **+** button and choose **Add knowledge** (its hint reads **Type @ to ask about a knowledge base**), which opens the list with its own **Search knowledge bases** field.
2. Keep typing after the **@** **to narrow the list by name, then select a knowledge base. Press Enter to pick the first match. While the list loads it says** Loading knowledge bases**; if nothing matches it says** No knowledge bases found**.
3. The knowledge base appears as a chip above the message box. You can add more; up to 10 per message. At 10 the list says **You can mention up to 10 knowledge bases.** Select the x on a chip (**Remove [name]**) to take it out.
4. Write your question as usual, for example "Can a microwave bought three weeks ago still be returned?", and send it. The chips are sent with that message only; mention them again in the next message if you want them again.
5. While the agent works, the activity line shows the tool **Search knowledge**. You do not need to name the files: the agent searches the mentioned knowledge bases and picks the passages it needs.
6. The answer contains small numbered markers such as [1] and [2]. Select a marker to see the passage it came from, its source name, the page (**Page [n]**) or time in a recording (**At [time]**), and a link **Open source [n]** that opens the original file or web page at that spot.
7. Under the answer, the collapsible list **Knowledge sources** shows each source the answer actually cites, as "[n] name, page or time". Select one to open it.
8. You do not always need to mention. Chats inside a project search the project's own knowledge base and the knowledge bases attached to the project, and an agent searches the knowledge bases attached to it (see "Attach knowledge bases to an agent"). Anything you mention is added to these.



Mentioning a knowledge base in the message box



An answer with numbered citations and the Knowledge sources list

Expected result

The agent answers from your documents, marks each statement with a numbered source, and every source opens to the exact page or time. If the knowledge bases do not cover the question, the agent is told to say so rather than invent an answer.

Troubleshooting

Problem	What to do
@ does nothing, or the list is empty	You have no knowledge bases you can see yet. Create one first, or ask the creator to share it with the workspace.
A knowledge base is missing from the list	It may be private to a colleague, or it was deleted.
The agent says it found nothing	Check in the knowledge base that the items are **Ready**, and try **Test search** with the same question. Rephrase using the words in your documents.
The agent answers without sources	It may have judged the question not to need them, or the passages did not match. Mention the knowledge base again and ask it to answer only from its sources.
A source has no **Open source** link	That source has no stored original to open. Open the item in the knowledge base and use **View extracted text**.
Items are still **Waiting** or **Processing**	They cannot be searched yet. Wait until they are **Ready**.
I cannot add an eleventh knowledge base	A message can mention up to 10. Remove a chip first.

Write a Page and ask AI about it

Purpose

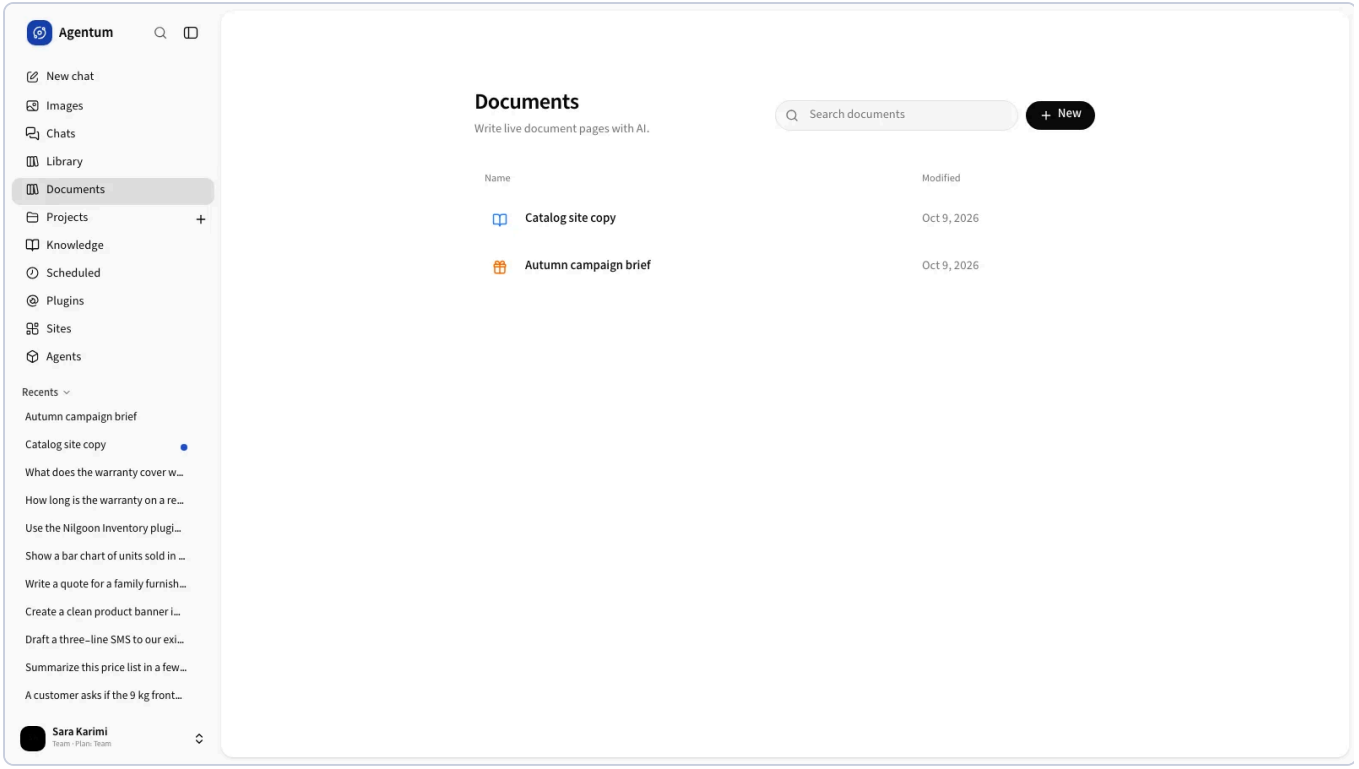
Sara’s idea for the autumn sale arrives as three lines in a message, and Parisa needs a real brief before the banners can start. A Page is a document you write in Agentum with an AI assistant beside it: you type, you can ask the assistant questions about the Page or for draft text, and you can download the result as a file.

Before you start

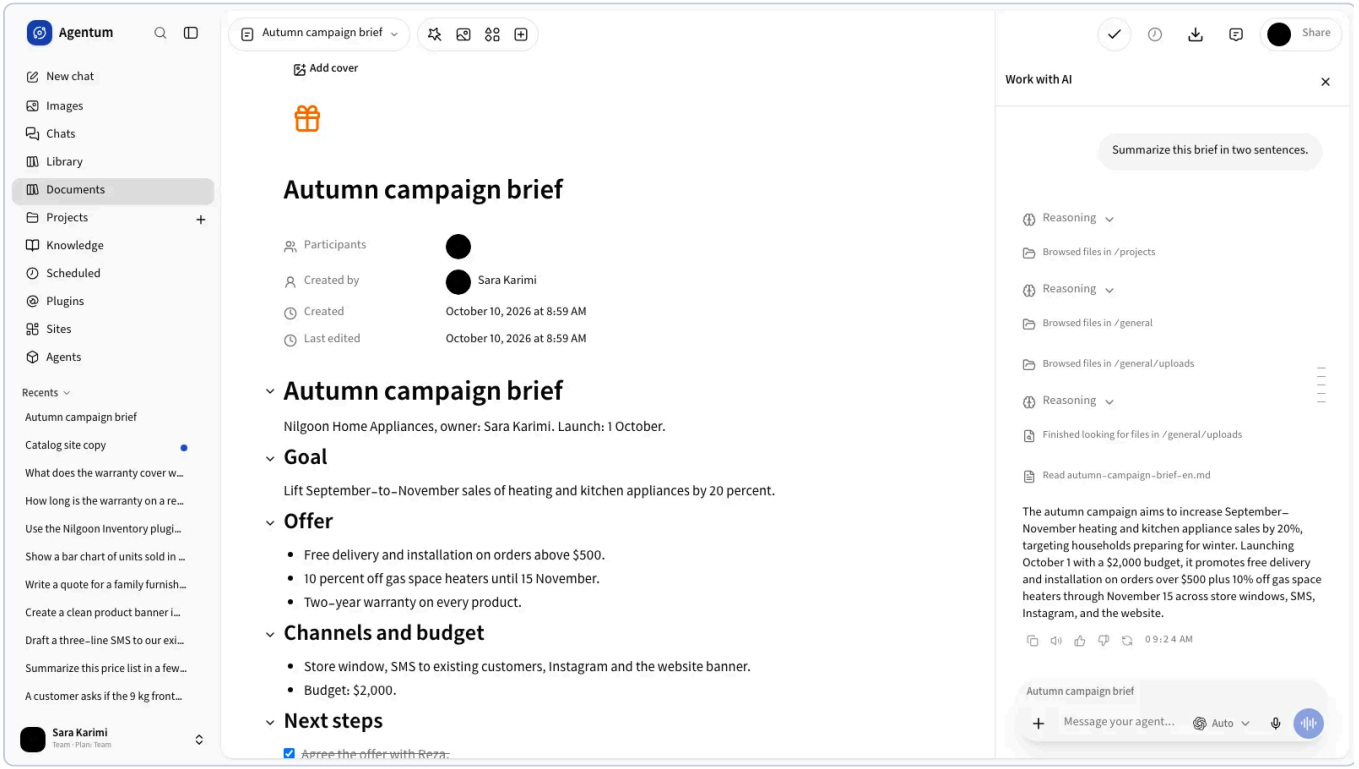
Sign in and select your workspace. Pages are saved to your account as you type, so there is no Save button.

Steps

1. Open **Documents** in the sidebar. The page lists your Pages with their name and the date of the last change. Use **Search documents** to find one. If the list is empty it says **No documents yet.**
2. Select **New**. A Page called **Untitled page** opens right away.
3. Type a title in the title field at the top (up to 200 characters). Select the icon above it (**Change page icon**) to choose an icon and a color. Select **Add cover** to add a picture across the top; once it is there, **Position** lets you drag it into place, and **Change** offers **Upload cover image** or **Remove**. Only images can be used as a cover. Under the title, the page shows **Participants**, **Created by**, **Created** and **Last edited**.
4. Write in the body. Type text, or add blocks from the insert button (**Insert**) in the top toolbar: headings (levels 1 to 6), paragraph, bulleted, numbered and checklist lists, quote, code, a **Formula (LaTeX)** block, a table (**Insert table**), a divider, a **Highlight** box, an image or file, and **Interactive HTML**. Select text to format it: bold, italic, underline, strikethrough, inline code, link, change its block type or alignment, or add a comment.
5. Point at the left edge of a block to open its handle. Drag the handle to move the block, or click it for **Turn into**, **Copy link**, alignment, **Comment** and **Delete block**. Headings can be collapsed with the arrow beside them, and a **Table of contents** at the side jumps to each heading. In a table, the row and column menus insert, move, resize and delete rows and columns.
6. To ask the AI about the Page or get a draft, select the **AI** button at the bottom corner of the page. A panel **Work with AI** opens beside the Page, with a normal chat box. Type what you want, for example “Summarize this brief in two sentences” or “Draft a short SMS for the autumn sale”. The assistant answers in the panel’s chat. For now it does not change the Page itself, so copy the text you want from its reply into the Page. Select text first, or use the **AI** button in the text toolbar, to ask about only that part. Select **Close chat** to hide the panel.
7. In the top toolbar, **Generate** adds a block where you describe what to write (**What would you like to write?**), **Image or file** adds an upload block, and **Visualize** adds a block where you describe interactive content (**Describe a visualization**). Send the request with **Send request**.
8. The round icon at the top right shows the save state: a spinner while **Saving…**, a check mark for **Saved**, and a crossed cloud for **Not saved**. If you lose the connection, the Page says **Your changes are saved on this device and will sync automatically when you’re back online.** If the Page was changed somewhere else, it says **This Page changed elsewhere. Your edits are saved on this device. Choose which version to keep.** Choose **Keep my edits** or **Use cloud version**.
9. To comment, select text or open a block’s handle menu and choose **Comment**, type under **Write a comment** and select **Post comment**. Open the **Comments** button in the top toolbar to see all comments; the menu on a comment offers **Edit comment** and **Delete comment**.
10. To save a copy, select the **Download** button and choose **Markdown**, **Word** or **PDF**. The Markdown and Word files download right away. **PDF** opens a print view in a new tab; select **Print or save PDF** and choose “Save as PDF” in your browser. The title menu (your page title with an arrow) offers **Download as Markdown** and **Word** too, along with **Rename**, **Copy** then **Copy link**, and **Delete**.
11. To delete a Page, use **Delete** in the title menu and confirm **Delete this document?**, or point at its row in the list, open its options button and choose **Delete [title]**, then confirm.



The Documents list



A Page with the AI panel open beside it, answering a question about the Page

Expected result

The Page holds your written brief, shows **Saved**, and can be downloaded as Markdown, Word or PDF. The AI panel keeps its conversation with the Page, so you can come back and ask more questions or for more drafts.

Troubleshooting

Problem	What to do
The Page shows **Not saved**	Your connection may be down. Keep working: your edits stay on this device and sync when you are back online.
This Page changed elsewhere…	The Page was edited in another window or by someone else. Choose **Keep my edits** to keep your version, or **Use cloud version** to take the saved one.
The AI wrote a draft but my Page did not change	The AI panel answers in its chat and does not change the Page itself yet. Copy the text from its reply and paste it into the Page.
The **Download** button is greyed out	The Page is still loading. Wait a moment.
The PDF tab is blank or blocked	If pop-ups are blocked, the print view opens in the same tab instead. Select **Print or save PDF** there, or allow pop-ups for Agentum and try **PDF** again.
Pin, **Share**, **Show attribution**, **Page activity** and **Page automations** are greyed out	These controls are shown but not available yet.
An upload to a block fails	The error appears at the top of the Page. Try a smaller file or another format.
I cannot find a Page I made	Use **Search documents** on the Documents list, and check that you are in the right workspace.

Workspaces and teams

Sara Karimi · Owner and manager of Nilgoon

Nilgoon has grown from Sara and a spreadsheet to four people, with Parisa joining for every campaign, and Sara keeps hearing “Can you give me access to that?” She wants Reza, Neda, Kian and Parisa to work from the same information without everyone changing everything. She creates a team workspace, adds each of them, gives Neda a role that can see the team’s activity, and groups the support people. Then she sets one rule about which models and plugins are allowed. At month end, the analytics show what the team really used.

In this chapter you will learn about “Create a shared workspace”, “Add a workspace member”, “Change member roles, status and groups”, “Create and inspect workspace roles”, “Create and manage workspace groups”, “Restrict workspace models, plugins and Work”, “Workspace administration” and “Analytics”.

Create a shared workspace

Purpose

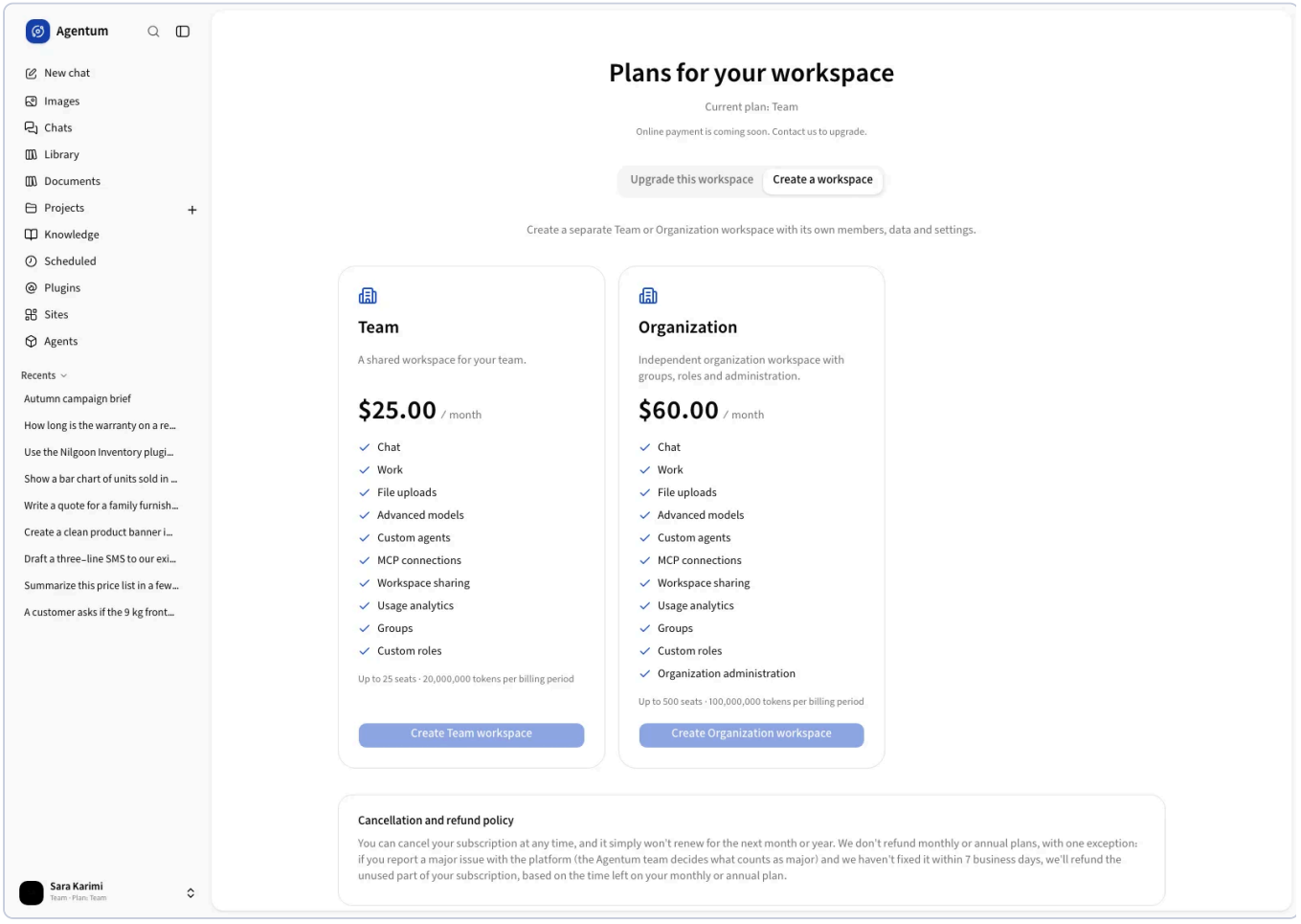
Sara wants Reza, Neda, Kian and Parisa to work from the same information, apart from her personal account. A Team or Organization workspace is a separate space with its own members, data and settings.

Before you start

You need the permission to manage billing in your current workspace. Creating a workspace uses a Team or Organization plan.

Steps

1. Open the account menu in the sidebar, open the submenu showing your name, and select **Create a workspace**. This opens **Plans for your workspace** on the tab **Create a workspace**.
2. Look at the plan cards. The page says **Online payment is coming soon. Contact us to upgrade.** and **Create [plan] workspace** is turned off on every card, so you cannot create a workspace yourself yet. To get a Team or Organization workspace, contact us through the contact page on the Agentum website.
3. Once you have a new workspace, open the workspace submenu in the account menu and select it. You are its owner. To invite people, open **Settings**, then **Workspace administration**.
4. To go back to another workspace later, use the workspace submenu in the account menu. Personal, Team and Organization workspaces are labeled there.



The Create a workspace tab with its plans and the online payment notice

Expected result

A new workspace appears in your workspace menu with its own members, projects, files and settings, separate from your current one.

Troubleshooting

Problem	What to do
The plan buttons are disabled	Online payment is not open yet, so the page shows **Online payment is coming soon. Contact us to upgrade.** The buttons are also turned off if your role does not include billing management.
I do not see the new workspace	Open the workspace submenu in the account menu and choose **Load more workspaces**.

Add a workspace member

Purpose

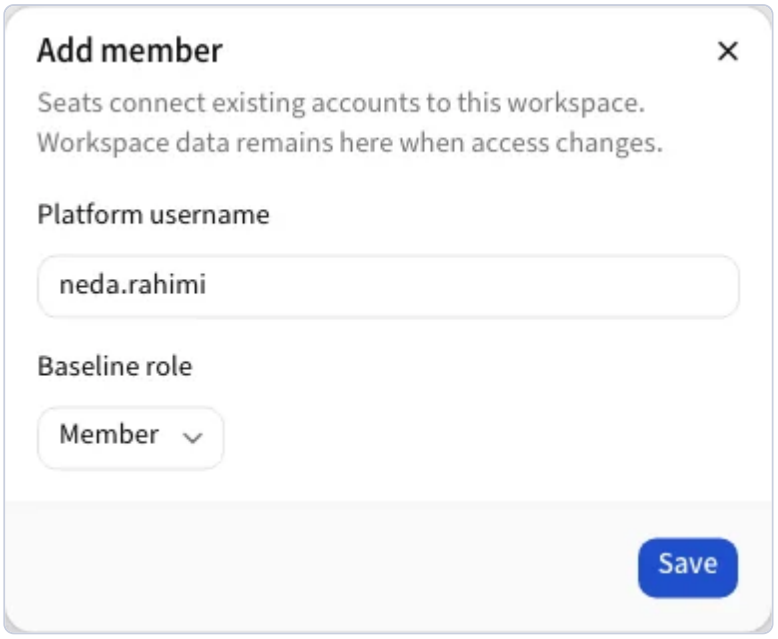
Reza already has an Agentum account, and Sara wants him on the team without sharing a password. Give an existing account a Seat in the selected Team or Organization workspace.

Before you start

- Select a team or organization workspace (see “Switch workspaces and manage access”).
- You need permission to manage members. Owners and Admins have it by default.
- The workspace plan must include workspace sharing and have a free Seat. Removed Seats do not count toward the limit.
- Ask the person to register first and send you their platform username (3 to 40 characters). Their Telegram username is a different thing.
- Only an Owner can add another Owner. An Admin can add Admins and Members, and cannot grant more access than they have themselves.

Steps

1. Open Settings, choose “Workspace administration” under “Workspace”, and stay on the “Members” tab.
2. Choose “Add member”. A dialog opens with the note that Seats connect existing accounts to this workspace.
3. Type the person’s username in “Platform username”.
4. Under “Baseline role” pick Member, Admin or (for Owners only) Owner.
5. Choose “Save”. The button reads “Saving…” while it works.



The Add member dialog

Expected result

The dialog closes and the person appears in the Members table with the status “Active”. They can now select this workspace from their own account menu. If the person had been removed from this workspace earlier, the same Seat becomes active again. Nothing is copied from your own account.

Troubleshooting

Problem	What to do
“No account was found. Ask the person to sign up first.”	Check the spelling of the platform username, or ask the person to register.
“This account already has a seat in this workspace.”	The person is already Active, Invited or Disabled here. Find them in the table and use the pencil button to change them instead.
“This workspace has reached its seat limit.”	Remove a member you no longer need, or ask a billing owner to raise the Seat limit with the plan.
“This workspace needs an active subscription.”	Ask the workspace owner to restore an active subscription. The plans page offers upgrades, not renewal of the same plan.
“Only an owner can do this.”	Choose Admin or Member, or ask an Owner to add the person.
“Add member” is missing	You are not allowed to manage members in this workspace, or it is a personal workspace, which has exactly one Seat.
Saving shows another error	Close the dialog and check the Members table before trying again, because the person may already have been added.

Change member roles, status and groups

Purpose

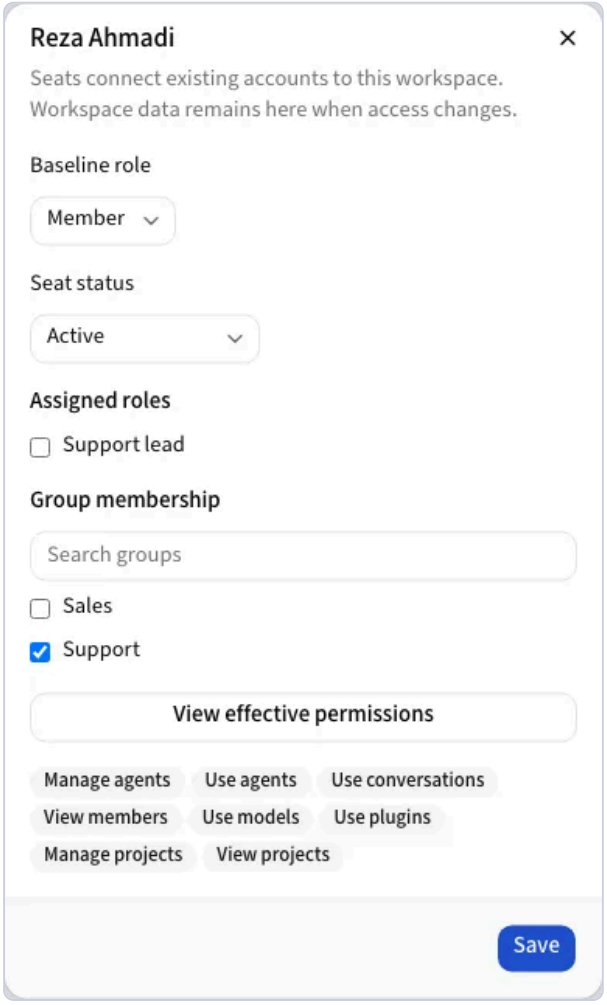
Kian now builds the shop’s agents and connects its systems, so a plain Member role is no longer enough for him. Change a member’s baseline role, disable or remove their Seat, give them custom roles and groups, and check what they can actually do.

Before you start

- Select a team or organization workspace and open the Members tab.
- You need permission to manage members. Changing custom roles also needs permission to manage roles, and changing groups needs permission to manage groups and a plan with groups. Group membership is hidden without permission to view groups. Assignment checkboxes are disabled without the corresponding management permission. A plan restriction can prevent saving.
- You can only hand out access you hold yourself. Only an Owner can assign the Owner role. The workspace must retain an active Owner.

Steps

1. Open Settings, choose “Workspace administration” under “Workspace”. The Members tab lists each person with their name, username, “Role”, “Seat status” and the number of “Groups”. Use “Search members” to filter, and “Previous” and “Next” to page through 50 at a time.
2. Choose the pencil button at the end of the row (its label is “Manage [username]”). A dialog opens with the member’s name as its title.
3. “Baseline role”: Member, Admin or Owner (Owner is offered only to Owners).
4. “Seat status”: “Active”, “Disabled” or “Remove member”. A disabled Seat keeps the person’s place but blocks access. Removing frees the Seat and clears their group memberships.
5. “Assigned roles”: tick custom roles for this person (up to 50 direct custom roles per member). If none exist yet, the dialog points you to the Roles tab.
6. “Group membership”: search for a group with “Search groups to assign” and tick the groups (up to 500 groups per member). Choose “Load more groups” for more.
7. Choose “View effective permissions” to see every permission the person currently has from their baseline role, assigned roles and groups combined. This works only for Active members. Disabled or Invited members show a seat-not-found error.
8. Choose “Save”. The dialog closes and the table refreshes.



The member editor

Expected result

The table shows the new role, the new status (“Active” or “Disabled”) and the group count. The person’s access changes at once. Removed people no longer see the workspace in their list, and workspace data stays in the workspace.

Troubleshooting

Problem	What to do
“Assign another active owner first.”	Every workspace needs an active Owner. Make someone else an Owner before demoting, disabling or removing the last one.
“Only an owner can do this.”	Ask an Owner to assign the Owner role.
“You cannot grant permissions that you do not have.”	The role or group you picked contains permissions you lack.
Role or group fields are greyed out	You lack permission to manage roles or groups. If the group field is missing, you lack permission to view groups.
“This workspace has reached its seat limit.”	To restore a removed member, use **Add member** with their username. A free seat is required.
“You do not have permission to do this.”	Your role does not include member management. Ask an Owner or Admin.
The “Save” button stays disabled	You cannot manage members in this workspace.

Create and inspect workspace roles

Purpose

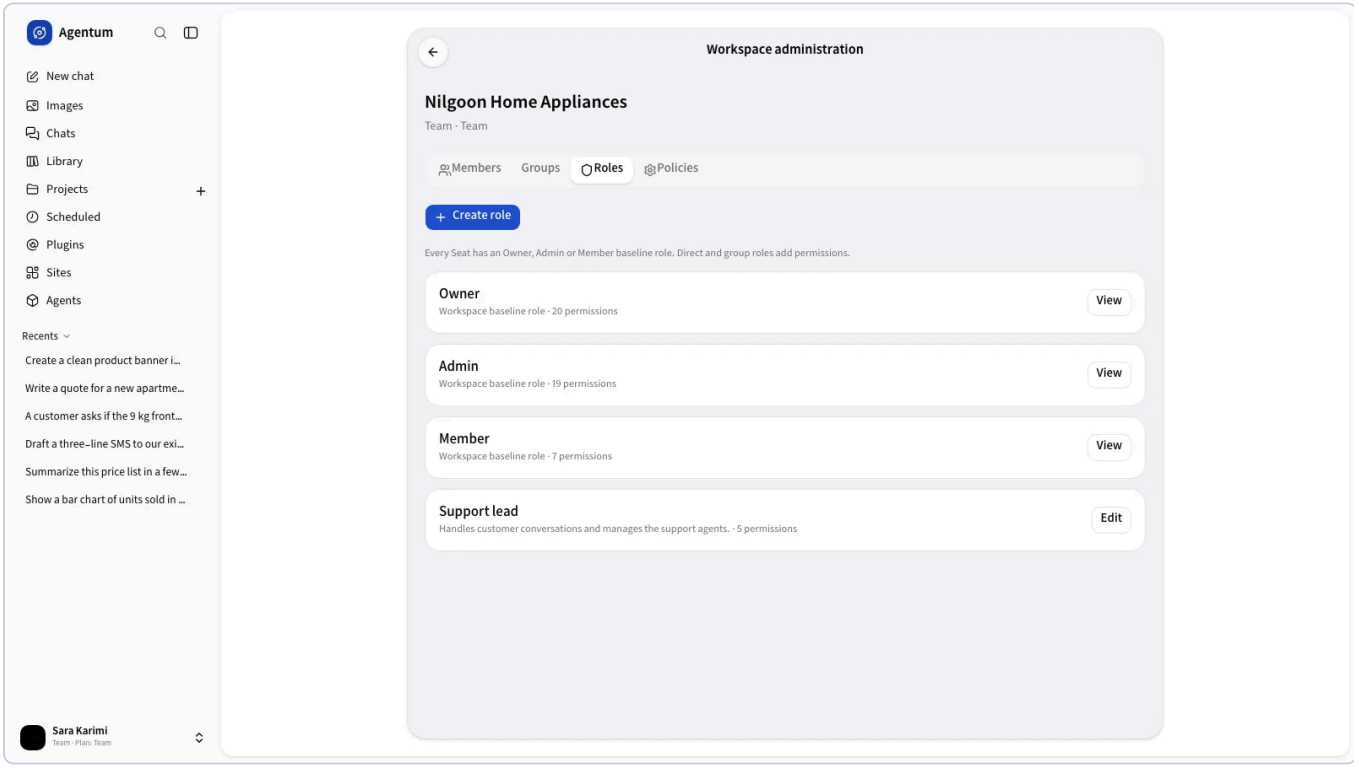
Sara wants Neda to see the team’s activity without being able to touch billing. See what Owner, Admin and Member can do, and create custom roles that add extra permissions to people or groups.

Before you start

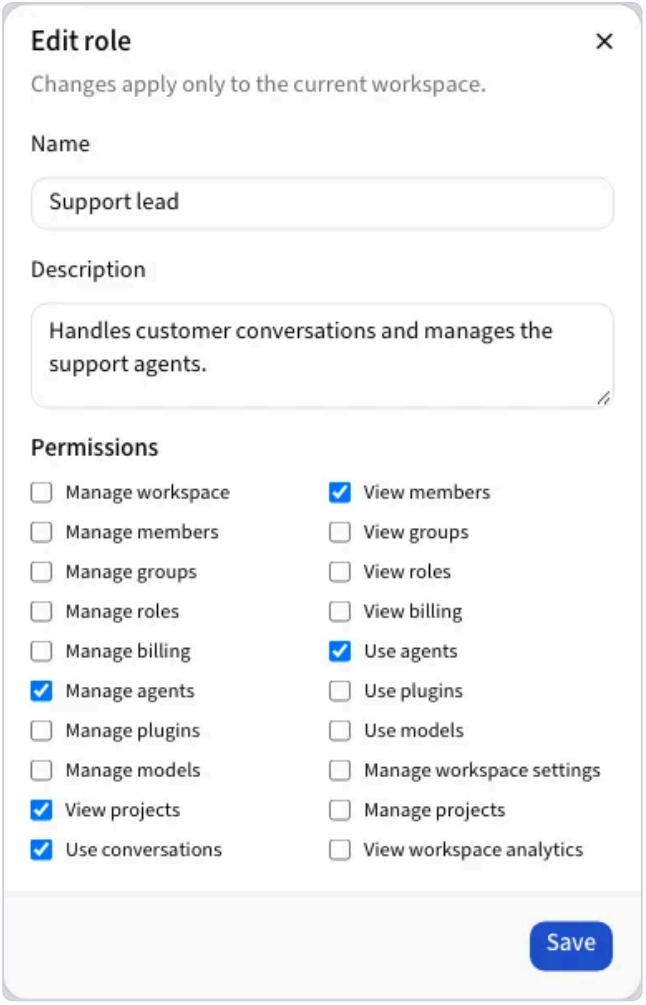
- Select a team or organization workspace.
- You also need permission to view members to open Workspace administration.
- You need permission to view roles to open the tab, and permission to manage roles to create or edit custom roles. Owners and Admins have both.
- The workspace plan must include custom roles. The workspace can hold up to 200 custom roles.
- You can only tick permissions you hold yourself, so a role can never give more than its author has.

Steps

1. Open Settings, choose “Workspace administration” under “Workspace” and select the “Roles” tab. The note at the top says every Seat has an Owner, Admin or Member baseline role, and that direct and group roles add permissions.
2. Read the list. Owner, Admin and Member come first, each described as “Workspace baseline role” with a permission count. Your custom roles follow in alphabetical order. Built-in roles have a “View” button, custom roles an “Edit” button (a “View” button if you cannot manage roles).
3. Choose “View” on a built-in role to read its permissions. Its fields are locked and “Save” is disabled. Owner has all permissions, Admin has all except “Manage billing”, and Member has “Use agents”, “Manage agents”, “Use plugins”, “Use models”, “View projects”, “Manage projects” and “Use conversations”.
4. To make a custom role, choose “Create role”. Enter a “Name” (required, 1 to 120 characters after surrounding spaces are removed) and optionally a “Description” (up to 1000 characters).
5. Under “Permissions” tick what the role should add. The choices are: “Manage workspace”, “View members”, “Manage members”, “View groups”, “Manage groups”, “View roles”, “Manage roles”, “View billing”, “Manage billing”, “Use agents”, “Manage agents”, “Use plugins”, “Manage plugins”, “Use models”, “Manage models”, “Manage workspace settings”, “View projects”, “Manage projects”, “Use conversations” and “View workspace analytics”.
6. Choose “Save”. To change a role later, choose “Edit”, adjust it and save again.
7. Give the role to a person (Members tab, “Assigned roles”) or to a group (Groups tab, “Assigned roles”).



The Roles tab



The role editor with its permissions

Expected result

The role appears in the list with its permission count. People who hold it, directly or through a group, get its permissions on top of their baseline role. A role never removes baseline permissions. If you have no custom roles yet, the three built-in roles stay visible in the list.

Troubleshooting

Problem	What to do
“Create role” is missing	You can view roles but not manage them.
A permission checkbox is greyed out	You do not hold that permission, so you cannot grant it.
“You cannot grant permissions that you do not have.”	Remove the permission, or ask someone who holds it.
“Your current plan does not include this feature.”	The workspace plan has no custom roles.
“This workspace has reached its role limit.”	Roles cannot be deleted from this page, so edit an existing role instead of creating a new one.

Create and manage workspace groups

Purpose

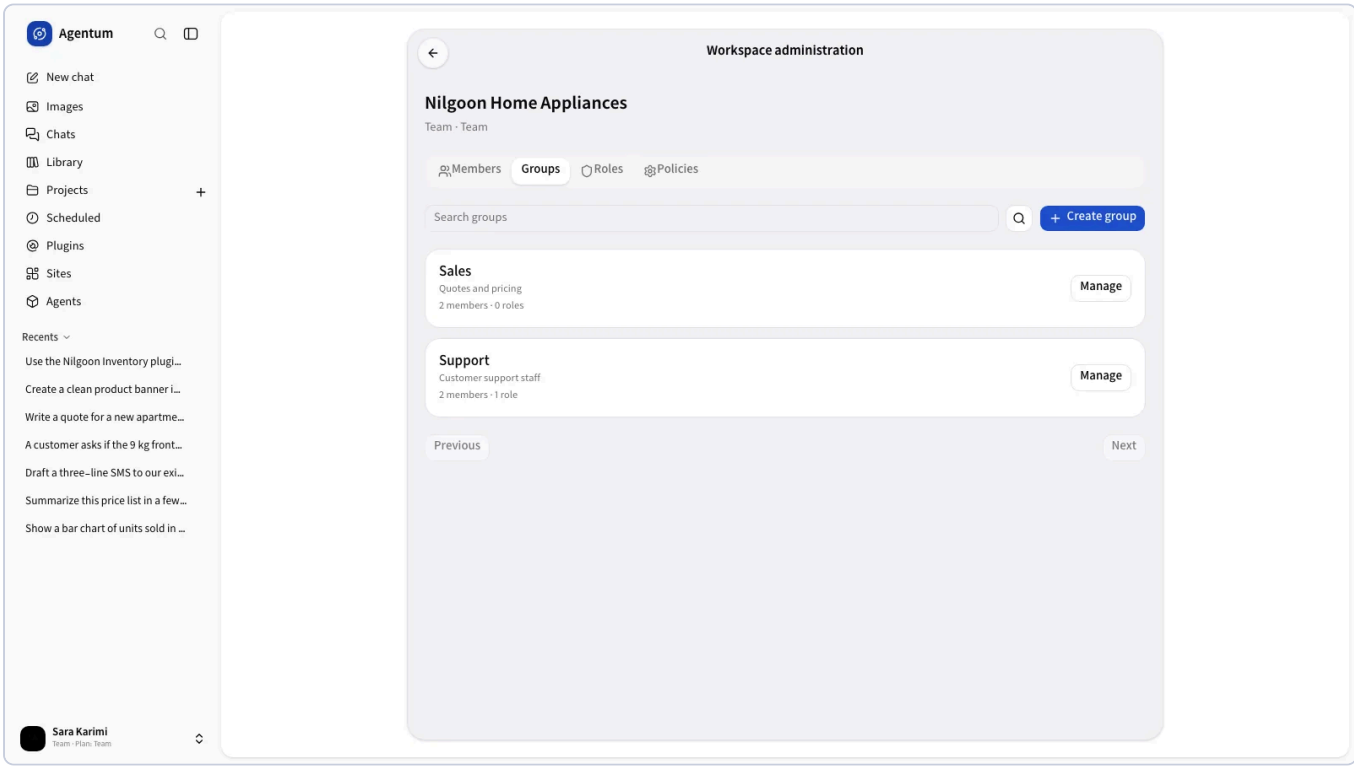
Repeating the same role changes for every new person in support gets old fast. Collect members into groups so that one or more custom roles reach all of them together.

Before you start

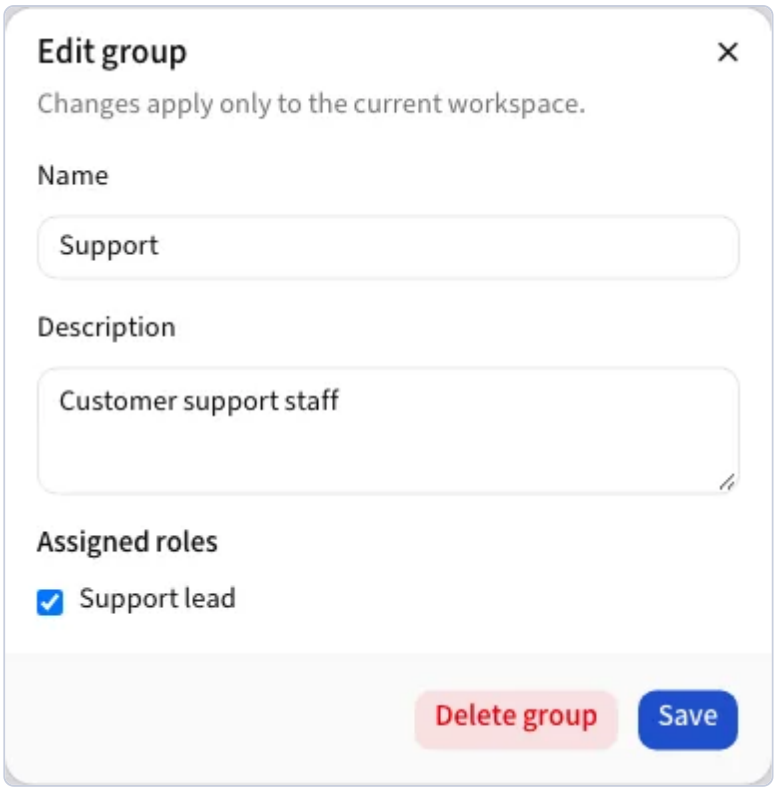
- Select a team or organization workspace.
- You also need permission to view members to open Workspace administration.
- You need permission to view groups to see the tab and permission to manage groups to change anything. Owners and Admins have both.
- The workspace plan must include groups. Giving a group a role also needs permission to manage roles, and you can only assign roles whose permissions you hold yourself. Editing a group that already has assigned roles also requires permission to manage roles, even if you change only its name or description.
- Create the custom roles first (see “Create and inspect workspace roles”) if you want the group to grant extra access. Groups are optional and do not replace the baseline role of each member.

Steps

1. Open Settings, choose “Workspace administration” under “Workspace” and select the “Groups” tab.
2. Use “Search groups” and the search button to find a group by name. Each card shows the name, the description and a line such as “3 members · 1 role”. The list loads 50 groups at a time: use “Previous” and “Next”.
3. To make a group, choose “Create group”. Enter a “Name” (required, 1 to 120 characters after surrounding spaces are removed) and optionally a “Description” (up to 1000 characters).
4. Under “Assigned roles” tick the custom roles the group should grant (a group can have at most 50 assigned roles). Seeing the role list needs permission to view roles, so an empty list can mean you lack that permission rather than that no roles exist. If you have none yet, the dialog says “Create a custom role in Roles to assign additional access.”
5. Choose “Save”.
6. To change a group, choose “Manage” on its card, edit the name, description or roles and choose “Save”.
7. To delete a group, choose “Manage” and then “Delete group”. Deleting removes the group and its memberships. The people stay in the workspace and keep their baseline roles.
8. To add people to a group, open the person from the “Members” tab and tick the group under “Group membership” (see “Change member roles, status and groups”). To assign people through the Members tab, you also need permission to manage members.



Groups tab with group cards



The group editor

Expected result

The group appears on the Groups tab with its member and role counts. Members of the group receive the group's roles in addition to their own, immediately.

Troubleshooting

Problem	What to do
The "Groups" tab is missing	You cannot view groups in this workspace. Ask an Owner or Admin.
"Create group" is missing, or "Manage" is disabled	You can view groups but not manage them.
"Your current plan does not include this feature."	The workspace plan has no groups. Upgrade the plan or use roles on individual members.
"You cannot grant permissions that you do not have."	A selected role contains a permission you lack. Ask someone with broader access, or pick another role.
"No groups yet. Create a group to organize access."	Nothing has been created in this workspace yet.
"The group was not found."	Someone else deleted it. Reload the tab.

Restrict workspace models, plugins and Work

Purpose

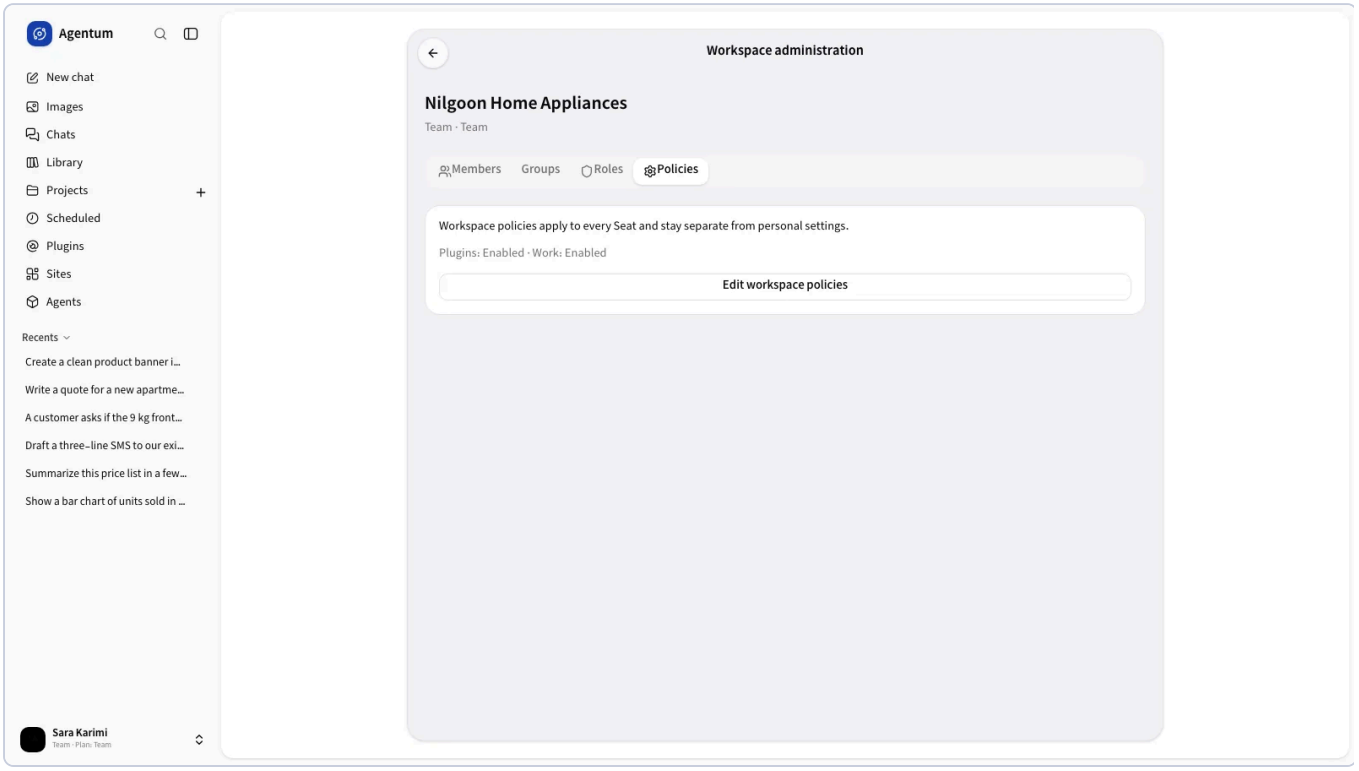
Sara wants the team to use only the models and plugins the shop has agreed on, not whatever each person happens to pick. Set workspace-wide rules that apply to every Seat: turn plugins or Work off, and limit which models and plugins people may use.

Before you start

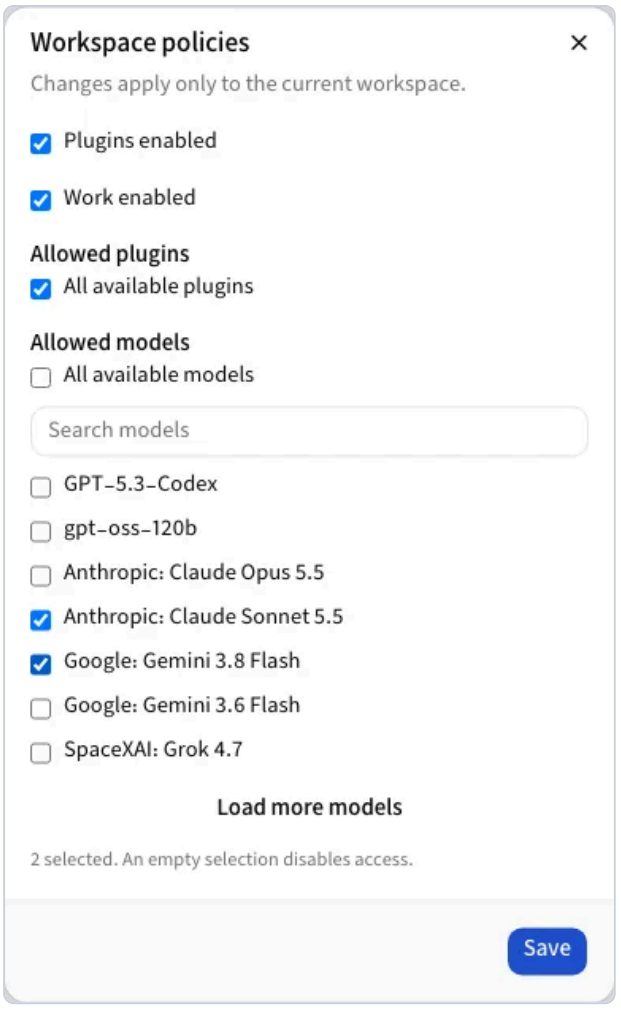
- Select a team or organization workspace.
- You also need permission to view members to open Workspace administration.
- You need permission to manage workspace settings, which Owners and Admins have. Without it the “Policies” tab is hidden.
- Policies work inside the plan: they can narrow what the plan offers but never add models or plugins the plan does not include.
- Policies are separate from personal settings and apply to everyone in this workspace only.

Steps

1. Open Settings, choose “Workspace administration” under “Workspace” and select the “Policies” tab. It shows a summary such as “Plugins: Enabled · Work: Enabled”.
2. Choose “Edit workspace policies”. The dialog “Workspace policies” opens.
3. Untick “Plugins enabled” to stop plugin use in the workspace, or untick “Work enabled” to refuse requests of the Work type.
4. Under “Allowed models”, leave “All available models” ticked to allow every model in the plan. To restrict, untick it, search with “Search models”, and tick the models people may use. Choose “Load more models” for more. Each restricted list supports up to 1,000 selections.
5. Do the same under “Allowed plugins” with “All available plugins”, “Search plugins” and “Load more plugins”.
6. Check the counter under each list, for example “2 selected. An empty selection disables access.” Unticking “All available” and choosing nothing blocks all models, or all plugins.
7. Choose “Save”. The model and plugin lists across the app refresh.



The Policies tab



The workspace policies dialog

Expected result

The Policies tab shows the new summary. People in this workspace can use only the allowed models and plugins, and restricted models disappear from model selection. Blocked plugins may remain visible in the catalog, but cannot be connected or used. Requests the policy forbids are refused with a message such as “Your workspace policy does not allow this kind of request.” or “Your plan or workspace policy does not allow this plugin.”

Troubleshooting

Problem	What to do
The “Policies” tab is missing	You lack permission to manage workspace settings.
Nobody can use any model or plugin	A list was left unticked on “All available” with nothing chosen. Reopen the dialog and tick what should be allowed.
A model you expect is not in the list	The list only offers models that your plan and this workspace make available.
Work stopped working for everyone	“Work enabled” is off. Turn it on again.
Saving shows an error	Reopen the tab to see whether the policy changed, then try again.

Workspace administration

Purpose

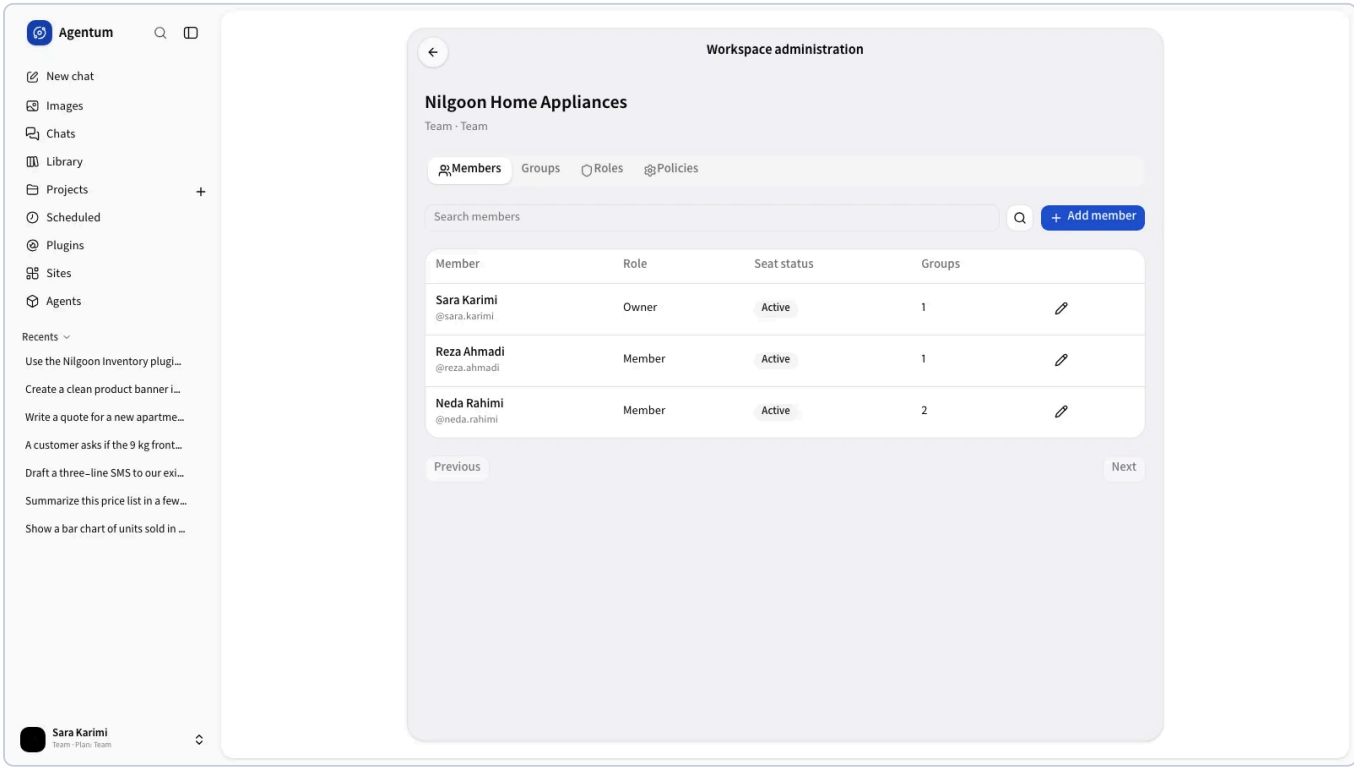
As the team grows, Sara needs one place to see who belongs to it and what each person, group and the whole workspace may do. Workspace administration is that place, with tabs for members, groups, roles and policies.

Before you start

- This page exists only in team and organization workspaces. In a personal workspace, which has exactly one Seat, it is not offered.
- You must be allowed to view members. Owners and Admins are; the plain Member role is not.
- Each tab needs its own permission, and changing things needs a “manage” permission. Some actions also depend on the workspace plan.

Steps

1. Select the workspace in the account menu at the bottom of the sidebar, then choose “Workspace administration” there. You can also open Settings and pick “Workspace administration” under “Workspace”.
2. Read the header. It shows the workspace name and a line such as “Organization · [plan name]”, or “No active plan”.
3. Pick a tab: “Members”, “Groups”, “Roles” or “Policies”. Only the tabs you may use are shown.
4. On Members and Groups, type in the search box (“Search members” or “Search groups”) and press Enter or the search button. Use “Previous” and “Next” to move through the results, 50 at a time. Roles and Policies have no search.
5. Use the button at the top right of the tab to add something: “Add member”, “Create group” or “Create role”. The Policies tab has “Edit workspace policies” instead.
6. Use the row buttons: the pencil on a member (“Manage [username]”), “Manage” on a group, “View” or “Edit” on a role.
7. If a list fails to load, an error appears with a “Retry” button. While loading, the page says “Loading members…”, “Loading groups…” or “Loading roles…”.
8. Follow the detailed guides: add a member, change a member, groups, roles and policies.



The Members tab of workspace administration

Expected result

You see the people, groups and roles of the selected workspace and can change them within your own permissions. Everything you change applies only to this workspace and takes effect at once.

Troubleshooting

Problem	What to do
“Workspace administration” is not in Settings	You are in a personal workspace or cannot view members. Switch workspace or ask an Owner or Admin.
“Workspace administration access is required.”	The same cause, reached through a link. Check which workspace is selected.
A tab is missing	Your role lacks the view permission for it. Typing the address does not help.
Buttons are missing or greyed out	Missing or disabled management buttons indicate missing permissions. A plan restriction may instead appear as an error when you save.
The list says “No members found.”	The search matches nobody. Clear the search box and search again.
An error with “Retry”	Choose “Retry” once your connection is back.

Analytics

Purpose

At the end of the month Sara wonders how much the team really used Agentum. See your workspace’s activity over the last 7 or 30 days: runs, models, plugins, errors, speed, tokens and cost.

Before you start

- You need permission to view workspace analytics. Owners and Admins have it, and so does the owner of a personal workspace. The plain Member role does not.
- The workspace plan must include analytics reports. Otherwise the page says “This workspace plan does not include analytics reports. Activity totals are available in Usage.” and the Usage page still shows your totals.
- The report covers activity of the whole workspace, not only your own.

Steps

1. Open Settings and choose “Analytics” under “Account”. The page is titled “Product activity” with the line “See workspace activity across models, tools, and runs.”
2. Choose “7d” or “30d” at the top. 30 days is the default. The report reloads.
3. Read the run cards. “Chat” and “Work” appear when the activity breakdown loads successfully, each with the number of runs, input and output tokens and total tokens. An “Analyze (historical)” card appears only when that period contains older analyze runs.
4. Read “Turns”: a stacked area chart of “Workspace turns grouped by model.” Hover or focus the chart for the values of a day. Up to six models are shown. Activity that cannot be tied to a model is labelled “Unattributed model”.
5. Read “Plugin activity”: a bar chart of “See which plugins were used over time.” It also shows up to six series, with “Platform” for built-in tools and “Unattributed plugin” for the rest.
6. Read “More details” for the period: “Runs”, “Model calls”, “Tool calls”, “Success rate”, “Errors”, “Avg latency”, “Total tokens” and “Recorded cost” ($, four decimal places).

Expected result

You see activity for the chosen range. The page only reports: it does not change usage limits, prices or billing.

Troubleshooting

Problem	What to do
“No activity recorded for this workspace yet.” or “No tool activity recorded for this workspace yet.”	Check for a loading error first and select “Retry”. If loading succeeds and the chart remains empty, try a wider range such as “30d”, or use Agentum first.
Values show a dash or loading bars	The report is still loading or could not be fetched. Those are not zero activity.
“Some settings could not be loaded.”	Choose “Retry”. If it keeps failing, you may lack permission to view workspace analytics.
The page says the plan does not include analytics reports	Upgrade the workspace plan, and use Usage in the meantime.

Account, plan and billing

Sara Karimi · Owner and manager of Nilgoon

It is the last Thursday of the month and Sara sits at the Nilgoon counter with her tea. The team has grown, the month’s bills are due, and she cannot say whether the workspace is still on the right plan.

She opens her profile, tidies up her name and sets a password. She checks which devices are signed in, sees how much of the plan the team has used, and compares the plans on offer. Mina, a customer who uses Agentum at home, checks how much room her family photos take.

In this chapter you will learn about “Profile”, “Edit profile”, “Change your username”, “Set or change your password”, “Login options”, “Active sessions”, “Subscription”, “Payment history”, “Usage”, “Understand plans and usage limits” and “Storage”.

Profile

Purpose

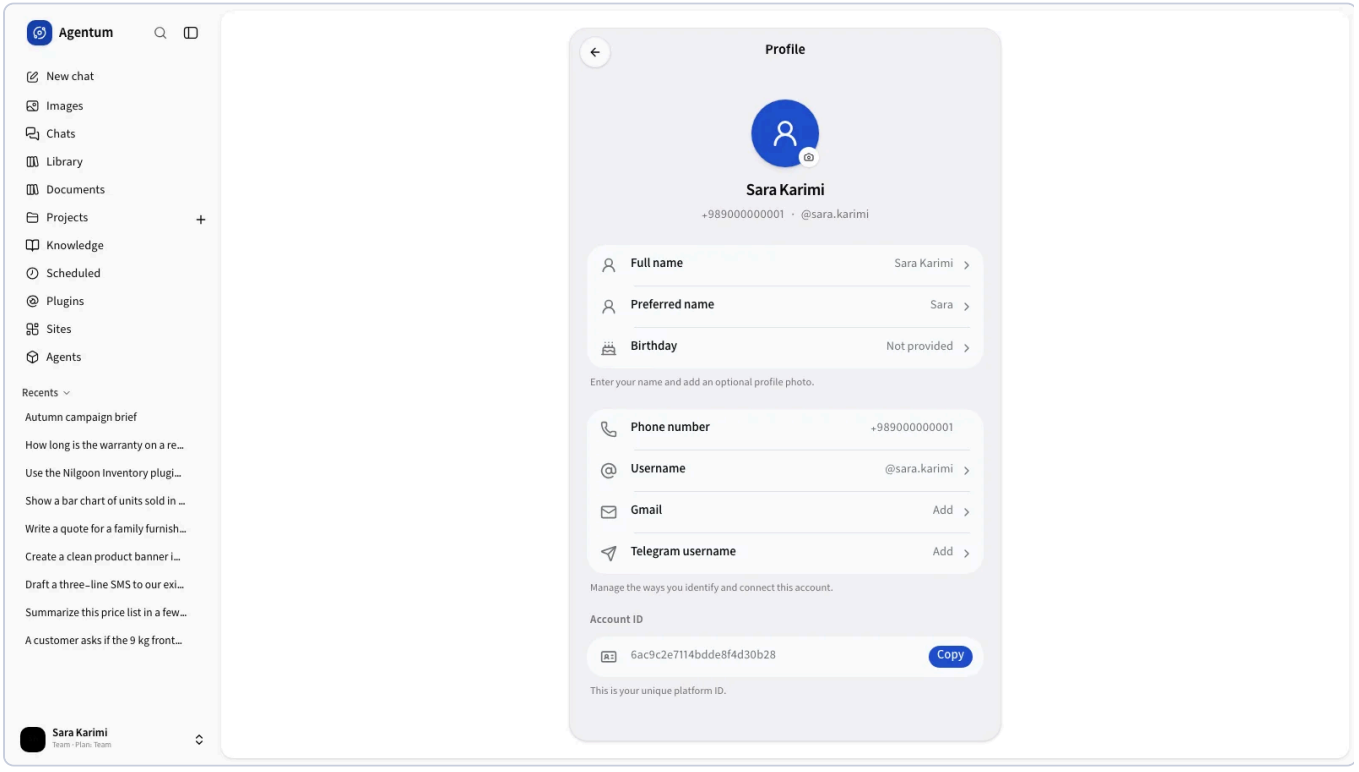
Sara wants her name to look right wherever her team sees it, and her account ID ready when support asks for it. This page shows how your account is identified and opens the pages where you change your name, photo, username and sign-in methods.

Before you start

Sign in to your own account. The profile belongs to your account and is the same in every workspace.

Steps

1. Open Settings, then “Profile”.
2. Select your picture (it has a small camera badge) or the “Full name”, “Preferred name” or “Birthday” row to open “Edit profile” and change your name, what Agentum calls you, your birthday or your photo.
3. Select “Username” to change your username. “Phone number” is shown for reference and cannot be edited here; it shows “Not provided” when none is known.
4. Select the “Gmail” or “Telegram username” row to open “Login options”, where you can connect or disconnect Telegram.
5. Under “Account ID”, select “Copy” to copy your unique account identifier. The button reads “Copied” for a moment. Share it only when support asks for it.



The profile page with name, phone, username and account ID

Expected result

The page shows your full name, preferred name, birthday, picture, phone number, username, email, Telegram username and account ID. Your username and your Telegram username are two separate values.

Troubleshooting

Problem	What to do
A value is still loading	Wait a moment for it to appear.
“Not provided” shows in the “Phone number” row	No phone number is available, and this row cannot be edited.
“Add” shows in the email or Telegram row	Open “Login options”. Telegram can be connected there; email connection is currently unavailable.
“Copy” does not copy	Your browser may block clipboard access. Select the account ID text and copy it by hand.

Edit profile

Purpose

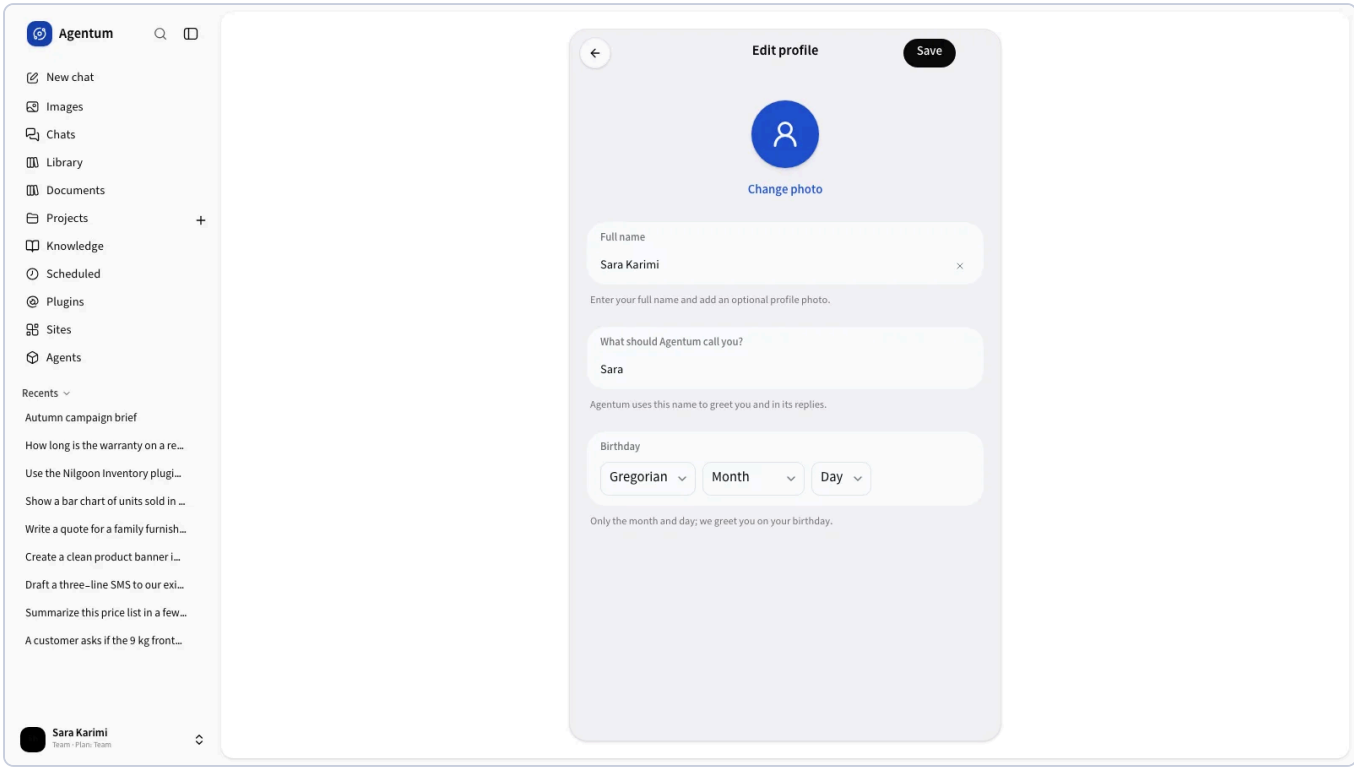
Mina would like Agentum to call her by the name she actually uses, and to show her photo next to it. Here you change your name, what Agentum calls you, your birthday and your profile photo.

Before you start

Sign in to your own account. Name and photo belong to your account, so they are the same in every workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard). Under Account, select Profile.
2. Select your picture or the Full name row. The Edit profile page opens.
3. Type your name in Full name, up to 80 characters. Use the x at the end of the field to clear it; a blank name cannot be saved.
4. In What should Agentum call you?, type the name Agentum should greet you by and use in its replies, up to 40 characters. If you leave it empty, Agentum uses the first word of your full name. Once a name is saved here you can change it but not remove it.
5. To add a birthday, choose a Calendar (Persian or Gregorian), a Month and a Day. Only the month and day are kept. Select the x (Clear birthday) to remove it.
6. To set a photo, select Change photo (or the picture) and choose an image file of at most 3.5 MB.
7. To remove a photo, select the x on the picture (Remove photo).
8. Select Save at the top.



Editing your name and photo.

Expected result

You return to the previous page and your new name, preferred name, birthday and photo appear. After you remove the photo, a default person icon is shown.

Troubleshooting

Problem	What to do
Save is greyed out	Save is enabled only when the full name is not blank, something changed, a saved preferred name has not been emptied, and a birthday has both a month and a day (or neither). It is also disabled while a photo is being read (“Reading photo…”) or while saving.
“Choose an image file.”	The file is not an image. Choose a picture file.
“Choose an image smaller than 3.5 MB.”	Pick a smaller image.
“Unable to read this image. Please try another file.”	Choose a different file.
“Your name was saved, but the photo was not.”	The name is saved. Open Edit profile again and retry the photo.

Change your username

Purpose

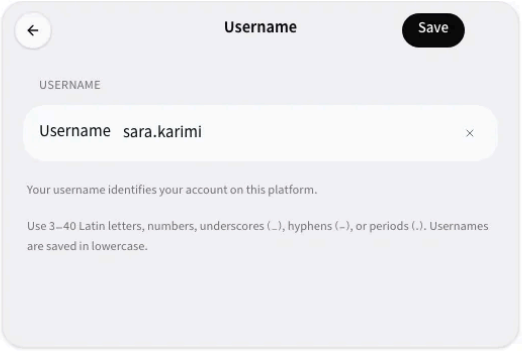
Sara picked her username in a hurry on the first day and wants something cleaner. Change the username that identifies your account on Agentum; it is separate from your Telegram username.

Before you start

Sign in to your own account. The username belongs to your account and is the same in every workspace.

Steps

1. Open Settings, then Profile, then select “Username”.
2. Type the new name. Use 3 to 40 Latin letters, numbers, underscores (_), hyphens (-) or periods (.). Capital letters are saved in lowercase.
3. To start over, select the clear button (“Clear username”) at the end of the field. An empty username cannot be saved.
4. Select “Save” at the top of the page and wait for the page to close.



The username field with the rules underneath

Expected result

You return to Settings and your new username shows on your profile and in your account details.

Troubleshooting

Problem	What to do
“Save” is disabled	The name is empty, invalid, unchanged, or a save is in progress. Fix the name and try again.
The name is rejected	Check the rules under the field: 3 to 40 characters, only Latin letters, numbers, _ - and .
The name is already taken	Choose a different username.
“Unable to update username.”	Keep the page open and try again when your connection is back.

Set or change your password

Purpose

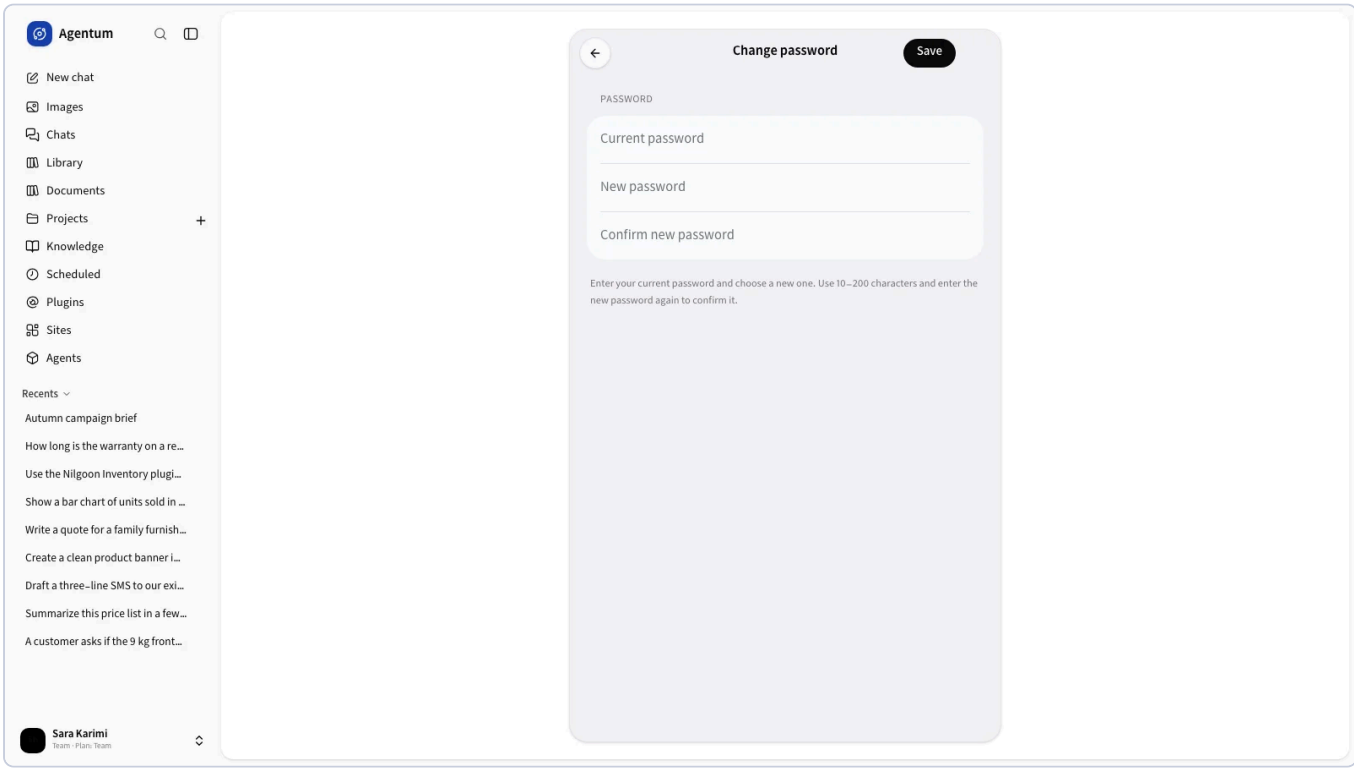
Before she invites her team into the shop’s workspace, Sara wants her own sign-in locked down. Set a password for your account, or replace the one you already have. It is the password for signing in to your own account, not a workspace password.

Before you start

Sign in to your own account. If you already have a password, have the current one ready.

Steps

1. Open Settings, then Login options. Under “Password”, select “Change password”. If your account has no password yet, the row says “Set password” instead.
2. If the page shows “Current password”, enter it. Accounts without a password do not see this field.
3. Enter a new password of 10 to 200 characters in “New password”, then enter the same password in “Confirm new password”.
4. Select “Save” at the top of the page and wait for the page to close.



The change password form with its three fields

Expected result

The fields are cleared and you return to Settings. Use the new password the next time you sign in with a password.

Troubleshooting

Problem	What to do
“Save” is disabled	Fill in every field on the page. Wait if a save is already in progress.
“New passwords do not match.”	Type exactly the same password in “New password” and “Confirm new password”.
“Use 10–200 characters for the new password.” or a browser hint about length	Make the new password at least 10 characters long (the field stops at 200).
“Check your password and confirmation.”	Re-enter both new-password fields and try again.
“The current password is incorrect.”	Check the current password and try again.
“Unable to change password.”	Keep the page open and try again when your connection is back.

Login options

Purpose

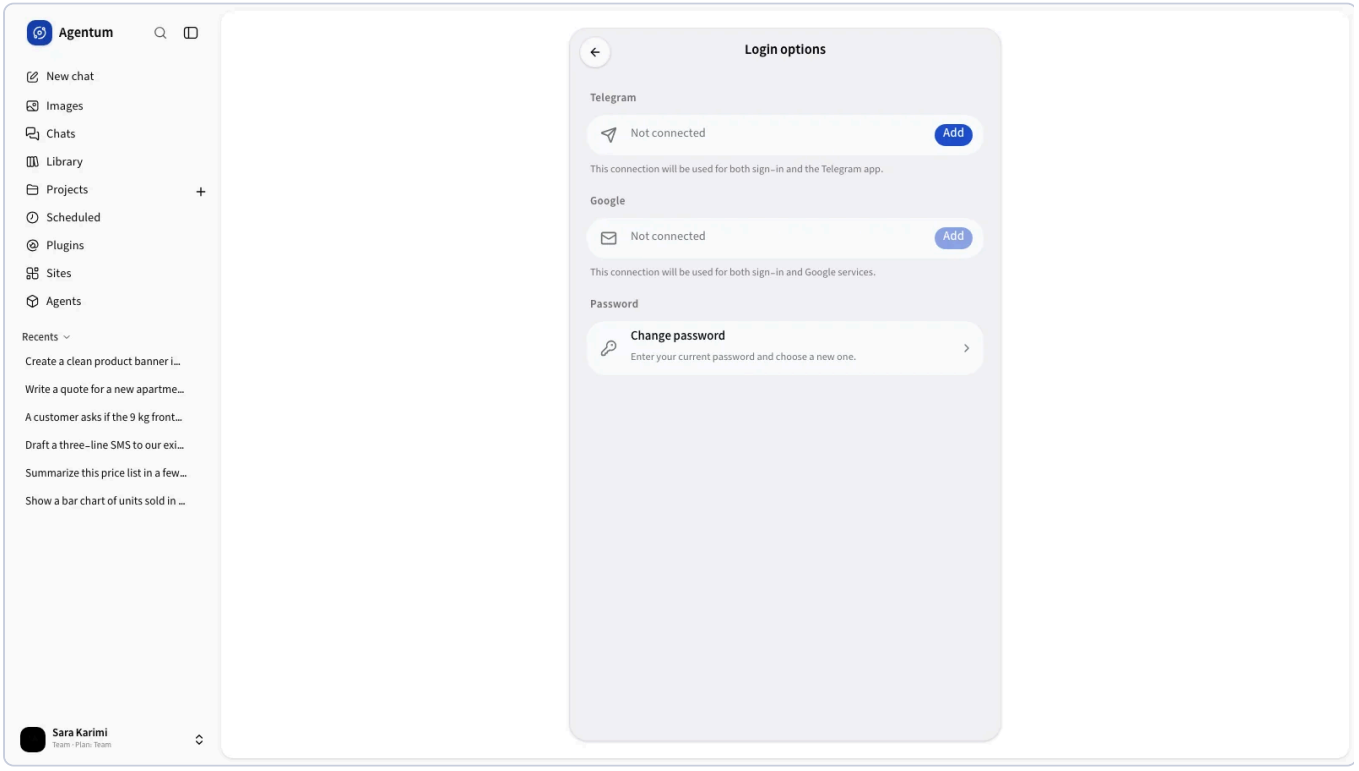
Sara usually signs in with Telegram on her phone and wants a password as a second way in. See how you can sign in to your account, connect or disconnect Telegram, and open the password page.

Before you start

Sign in to your own account. Login options belong to your account and are shared by all your workspaces.

Steps

1. Open Settings, then “Login options”.
2. Under “Telegram”, the row shows your Telegram username, or “Connected” or “Not connected”. If it is not connected, select “Add” and finish the Telegram authorization. If it is connected, select “Disconnect” to remove the link. If you have no password, set one before disconnecting Telegram so you can sign in again. The same connection is used for signing in and for the Telegram app.
3. Under “Google”, the row shows your email address or “Not connected”. Its “Add” button is turned off, so a Google account cannot be connected from here.
4. Under “Password”, select “Change password” (or “Set password” if you have none) to open the password page.



Login options with Telegram, Google and Password

Expected result

The Telegram row matches the real state of the link. On the Settings home, the Login options row shows a count such as 1/3. The count increases for a configured password and a Telegram connection. The unavailable Google connection does not contribute. The password row only opens the password page; nothing changes until you save there.

Troubleshooting

Problem	What to do
The Telegram row is still loading	Wait for it to finish before you act.
“Disconnecting…” stays on	Wait for it to end. The button is disabled meanwhile.
“Unable to disconnect Telegram.”	The link may still be in place. Check the row, then try again.
The “Add” button under “Google” does nothing	It is turned off for now.

Active sessions

Purpose

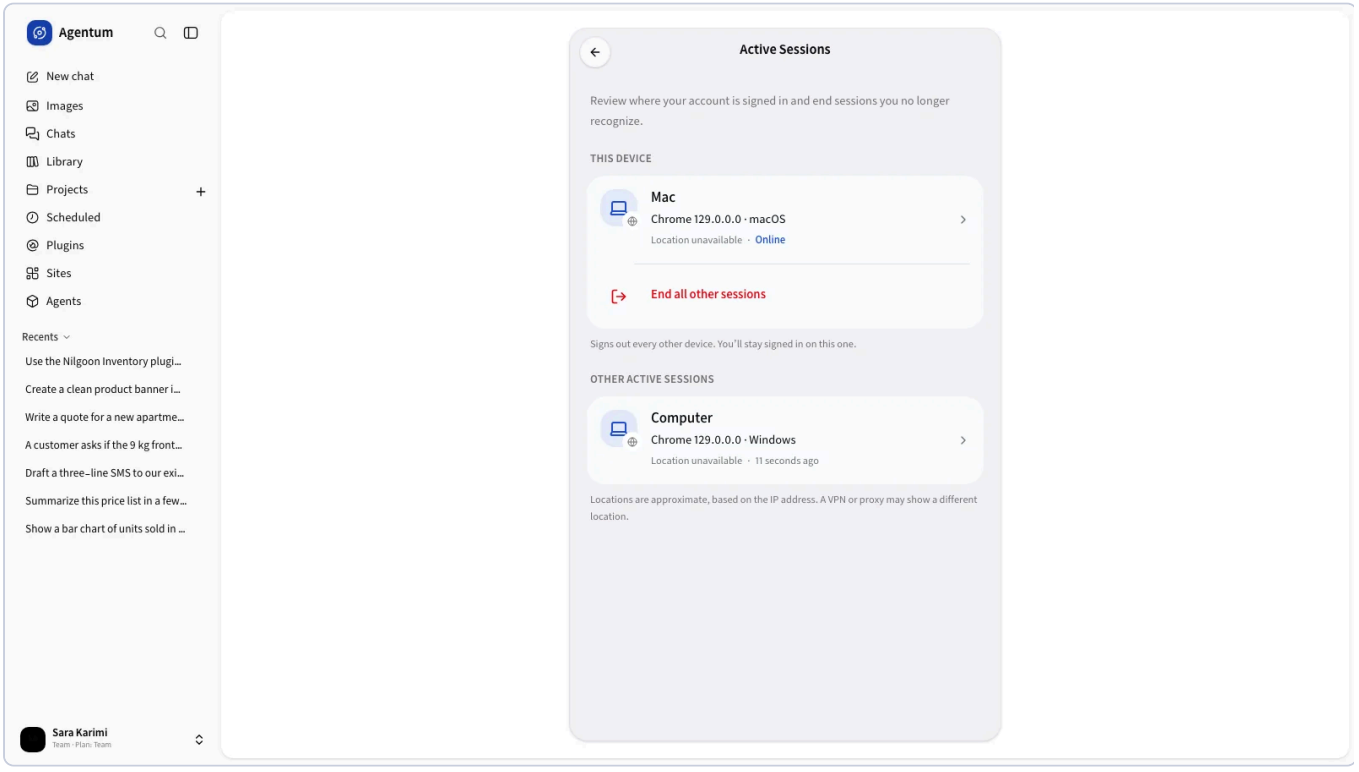
Sara signed in on a computer at the shop and walked away without signing out. See every device where your account is signed in, and sign out the ones you do not recognize.

Before you start

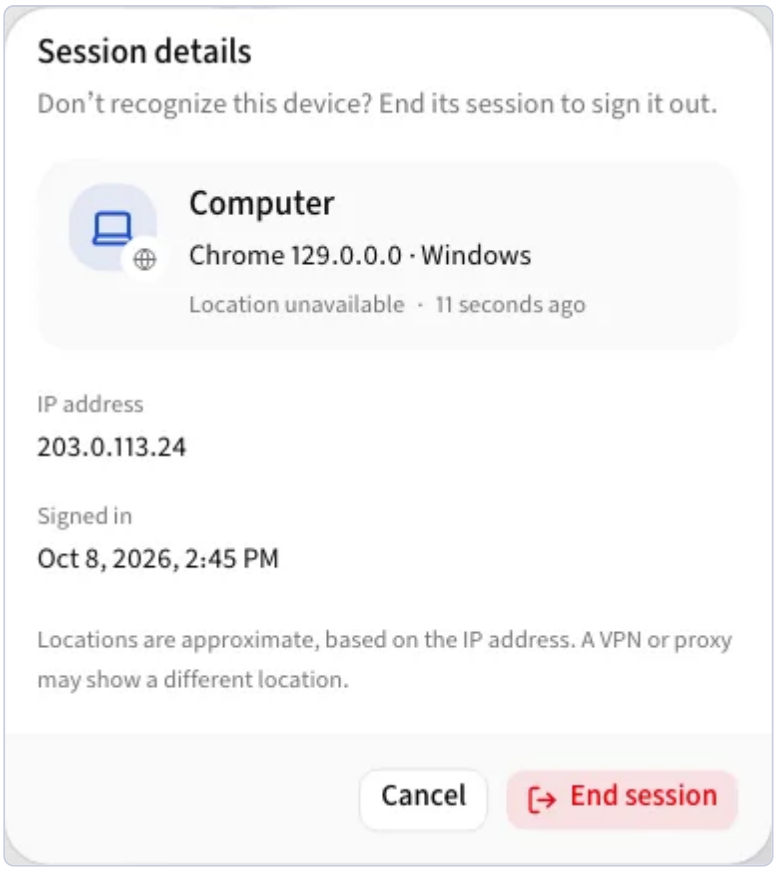
Sign in to your own account. Sessions belong to your account, not to one workspace.

Steps

1. Open Settings, then “Active Sessions”. The row on the Settings home shows how many sessions you have.
2. “THIS DEVICE” lists the session you are using now, marked “Online”. “OTHER ACTIVE SESSIONS” lists the rest, newest activity first, each with the device, browser, system, approximate location and when it was last active.
3. Select a session to open “Session details”: IP address and the time you signed in. For your own device you can only select “Close”.
4. For another device, select “End session” to sign it out, or “Cancel” to leave it signed in.
5. To sign out every other device at once, select “End all other sessions” under “THIS DEVICE”, then confirm in “End all other sessions?”. You stay signed in on this device.



The list of active sessions



Session details for another device, with End session

Expected result

An ended session disappears from the list and that device is signed out. Your account and workspaces are not deleted. When nothing else is signed in, the page says “No other active sessions”.

Troubleshooting

Problem	What to do
The location looks wrong	Locations are approximate and come from the IP address. A VPN or proxy can show a different place.
“No active sessions” or “Your current sign-in may have just expired.”	Reload the page and sign in again if asked.
“Could not end the session. Please try again.”	Reload the session list. If the session is still listed, try ending it again.
You do not recognize a device	End its session, then change your password in Login options.

Subscription

Purpose

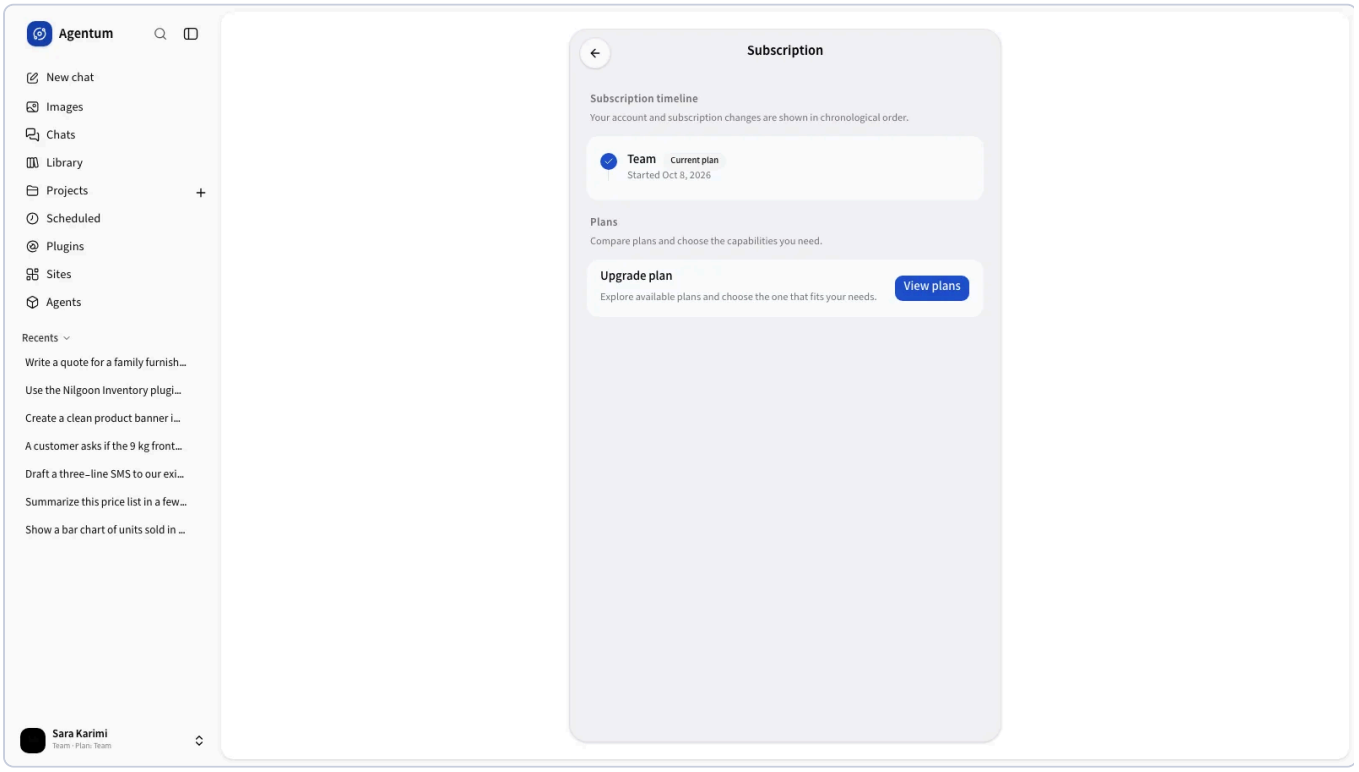
Before deciding whether Nilgoon needs more, Sara checks which plan the workspace is on. See your workspace’s plan and the date shown in its subscription timeline, and compare available plans.

Before you start

You need permission to view billing in the workspace. Without it, the “Subscription” row does not appear in Settings.

Steps

1. Open Settings, then “Subscription”. The row on the Settings home shows the plan name, or “Free plan” when there is none.
2. Under “Subscription timeline”, read the “Current plan” entry: the plan name and “Started [date]”. If no history exists yet, the page says “Subscription history is not available yet.”
3. Under “Plans”, next to “Upgrade plan”, select “View plans” to open the pricing page and compare plans. Plans cannot be bought online yet; the page says “Online payment is coming soon. Contact us to upgrade.”



The subscription page with the current plan and View plans

Expected result

You see your current plan and the date shown in its subscription timeline (this date may predate your latest upgrade), and “View plans” opens the pricing page.

Troubleshooting

Problem	What to do
There is no “Subscription” row	Your role in this workspace does not include billing. Ask a workspace administrator.
The plan name shows a dash	The value is still loading or could not be loaded. Reload the page.
You want to see what you paid	Open “Payment” in Settings.

Payment history

Purpose

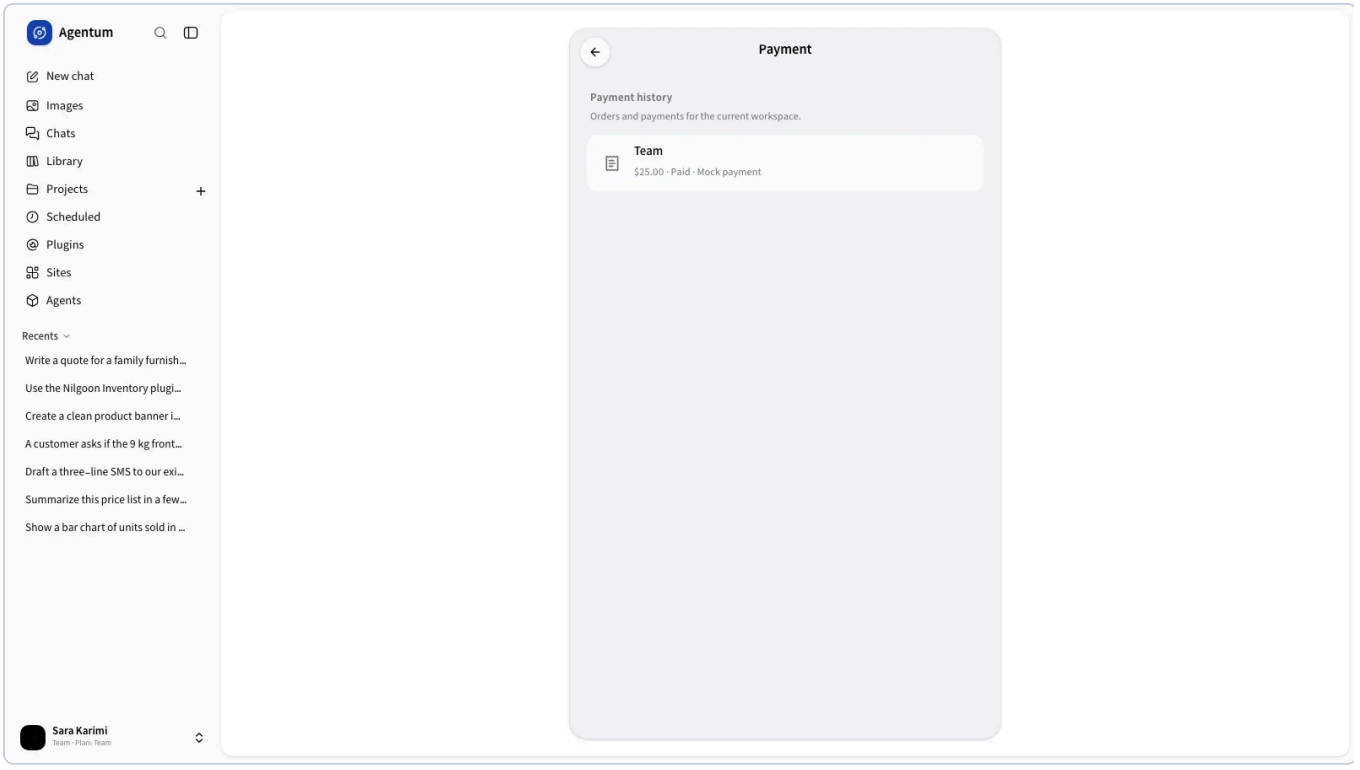
Sara wants to look back at what was ordered for the shop’s workspace. See the latest 50 orders for this workspace or started from it, including orders that created another workspace.

Before you start

You need permission to view billing in the workspace. Without it, the “Payment” row does not appear in Settings.

Steps

1. Open Settings, then “Payment”.
2. Under “Payment history”, each order shows the plan name, the amount, its status and the “Mock payment” marker. The status is “Pending”, “Paid” or “Failed”.
3. Online payment is not available yet, and any orders shown here are simulated; a Paid status does not mean money was charged.
4. When no orders are returned, the page shows “No payments yet”. Check for a loading error before treating this as an empty history.



The payment history list

Expected result

You see the workspace orders, one row each. The page only lists them; you cannot change or refund an order here.

Troubleshooting

Problem	What to do
There is no “Payment” row	Your role in this workspace does not include billing. Ask a workspace administrator.
“No payments yet”	No orders were returned. Check for a loading error first. Pending orders also appear in the list, so an empty page means no order exists. To compare plans, open “Subscription” and select “View plans”; to upgrade, contact us, because online payment is coming soon.
An order shows “Pending” or “Failed”	The payment did not complete, and no money was charged. Online payment is coming soon; to upgrade, contact us.

Usage

Purpose

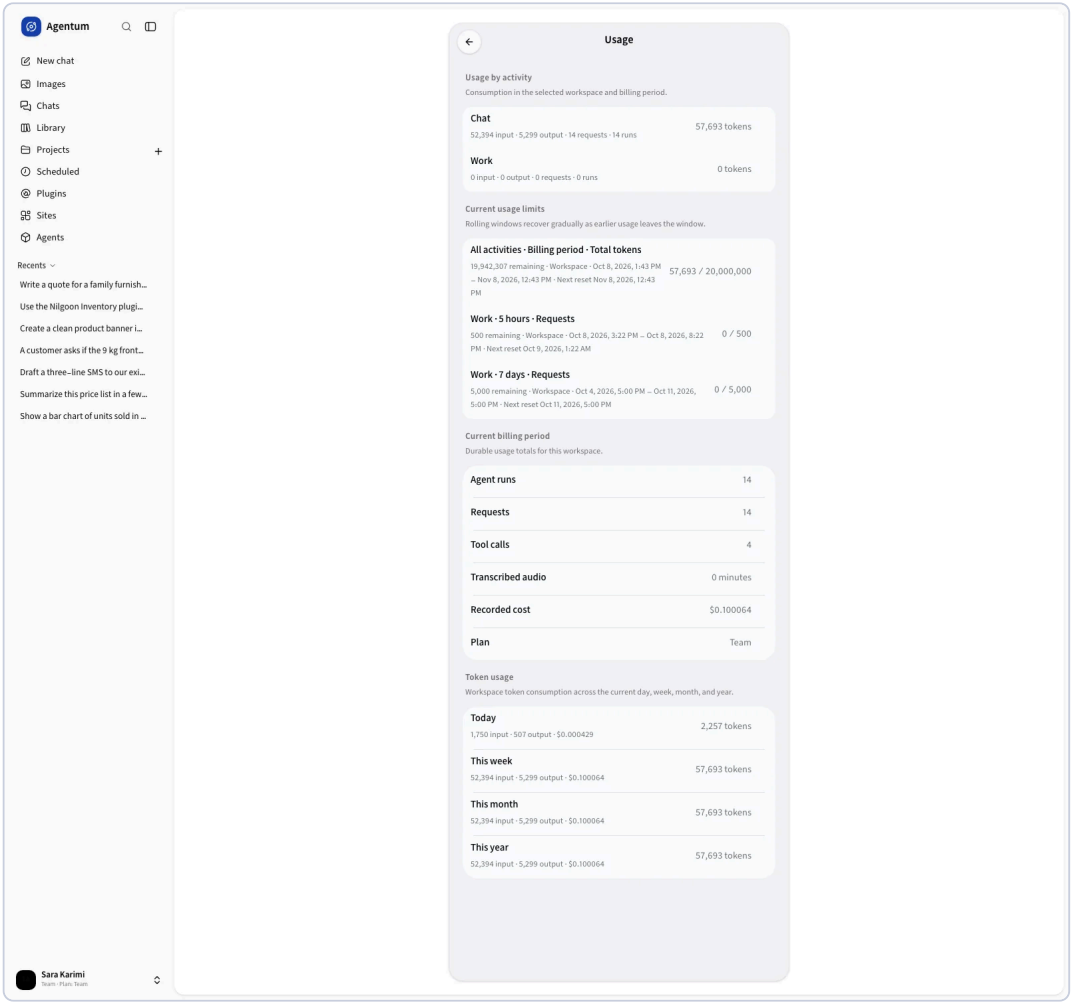
Halfway through the month, Sara wonders whether the team is heading for its limits. See how much of your plan the workspace has used: runs, requests, tokens and the limits that apply right now.

Before you start

Open the workspace you want to look at. With permission to view workspace analytics, these totals cover the workspace. Otherwise, they cover your own usage in this workspace. Limit rows separately identify whether they apply to your seat or the workspace.

Steps

1. Open Settings, then “Usage”.
2. “Usage by activity” (when available) lists each kind of work, such as “Chat” or “Work”, with its tokens and a breakdown of input, output, requests and runs.
3. “Current usage limits” (when your plan has limits) lists each limit as “[used] of [limit]”, with what remains, whether it applies to “Your seat” or the “Workspace”, the period, and when it resets next. Limits over a rolling window free up gradually as older usage leaves the window.
4. “Current billing period” shows “Agent runs”, “Requests”, “Tool calls”, “Transcribed audio”, “Recorded cost” and your “Plan”.
5. “Token usage” shows tokens for “Today”, “This week”, “This month” and “This year”, each with input, output and cost. Embedding tokens are also shown and included when present. Calendar totals use UTC. Weeks start on Monday; months and years follow the Gregorian calendar.



The usage page with billing period totals and token usage

Expected result

You see up-to-date totals for the workspace, or for your own usage if you cannot view workspace analytics. A dash means a value could not be loaded.

Troubleshooting

Problem	What to do
Values show a dash	Reload the page. If it persists, try again later.
A limit is nearly used up	Wait for its next reset time, or open “Subscription” to look at other plans.
Numbers differ from what you expected	“Current billing period” counts the billing period; “Token usage” counts calendar day, week, month and year.

Understand plans and usage limits

Purpose

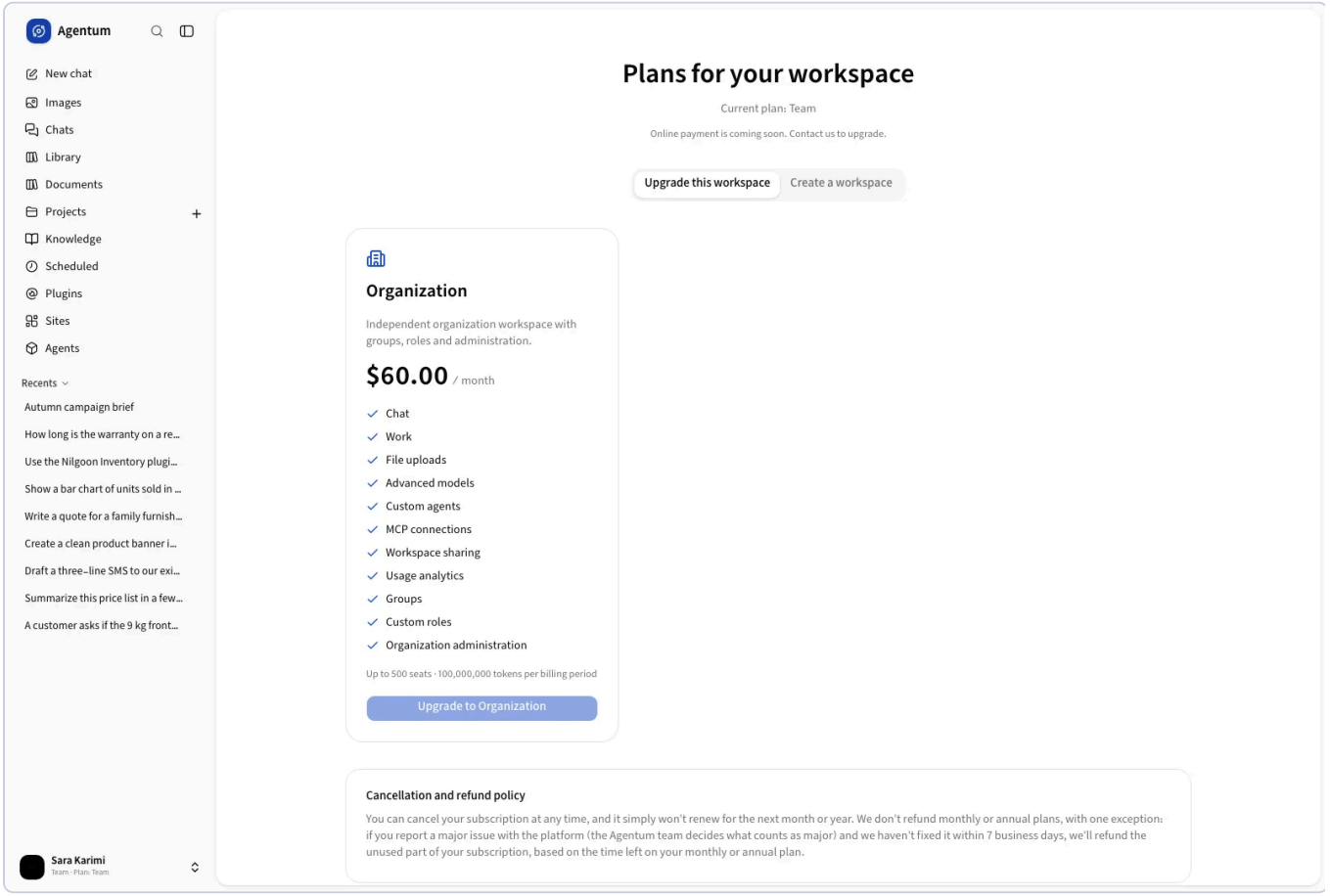
Nilgoon’s team is growing, and Sara needs to know whether the current plan still fits. Compare the plans on offer, see what your workspace has now, and check how much you have used.

Before you start

Select the workspace whose plan you want to review. Seeing plans needs billing view access, and the plan buttons need billing management access. While online payment is unavailable the plan buttons are greyed out for everyone (see step 4).

Steps

1. Open the plans page: open the account menu (your name at the bottom of the sidebar) and select **Upgrade plan**, or open **Settings**, then **Subscription**, and select **View plans**. The page is titled **Plans for your workspace** and shows **Current plan: [name]**.
2. The tab **Upgrade this workspace** lists plans higher than yours. The tab **Create a workspace** lists Team and Organization plans for a separate shared workspace.
3. Each card shows the plan name, a short description, the price per month or year, the features it includes (such as file uploads, advanced models, custom agents, groups and custom roles) and its limits: the number of seats and the tokens per billing period, or **Unlimited seats** and **No token limit**.
4. Plans cannot be bought online yet. The page says **Online payment is coming soon. Contact us to upgrade.**, and the **Upgrade to [plan]** and **Create [plan] workspace** buttons are turned off. Use the page to compare plans, then contact us to upgrade.
5. Read **Cancellation and refund policy** at the bottom of the page. When the workspace has orders, **Billing history** below it shows the latest 50 orders for this workspace or started from it, including orders that created another workspace.
6. To see what you have used, open **Settings**, then **Usage** (runs, requests, tokens and your current limits), **Storage** (space used against your plan's storage limit) and **Payment** (your payment history).



The plans page with the upgrade and create-workspace tabs

Expected result

You can compare plans without changing anything. A higher plan changes your limits and features; it does not replace the permissions of your role. If you have the highest plan, the page says **You already have the highest available plan for this workspace.**

Troubleshooting

Problem	What to do
The page says online payment is coming soon	That is the current state: **Online payment is coming soon. Contact us to upgrade.** Plans cannot be bought online yet, so contact us to upgrade.
The plan buttons are disabled	Online payment is not available yet, so the buttons stay turned off. If payment becomes available and they are still off, your role does not include billing management; ask the workspace owner.
The plans do not load	The page shows an error. Reload it. Prices and limits come from the current catalog, so do not rely on figures you remember.
I reached a limit	Check **Settings**, **Usage** for the window that resets, and **Settings**, **Storage** for space. Compare the available plan's allowance for the specific limit you reached before upgrading. The message may name the time the limit resets: "You have reached your usage limit. It resets at [time]." Limits on knowledge bases show in the **Plan limits** panel of each knowledge base.

Storage

Purpose

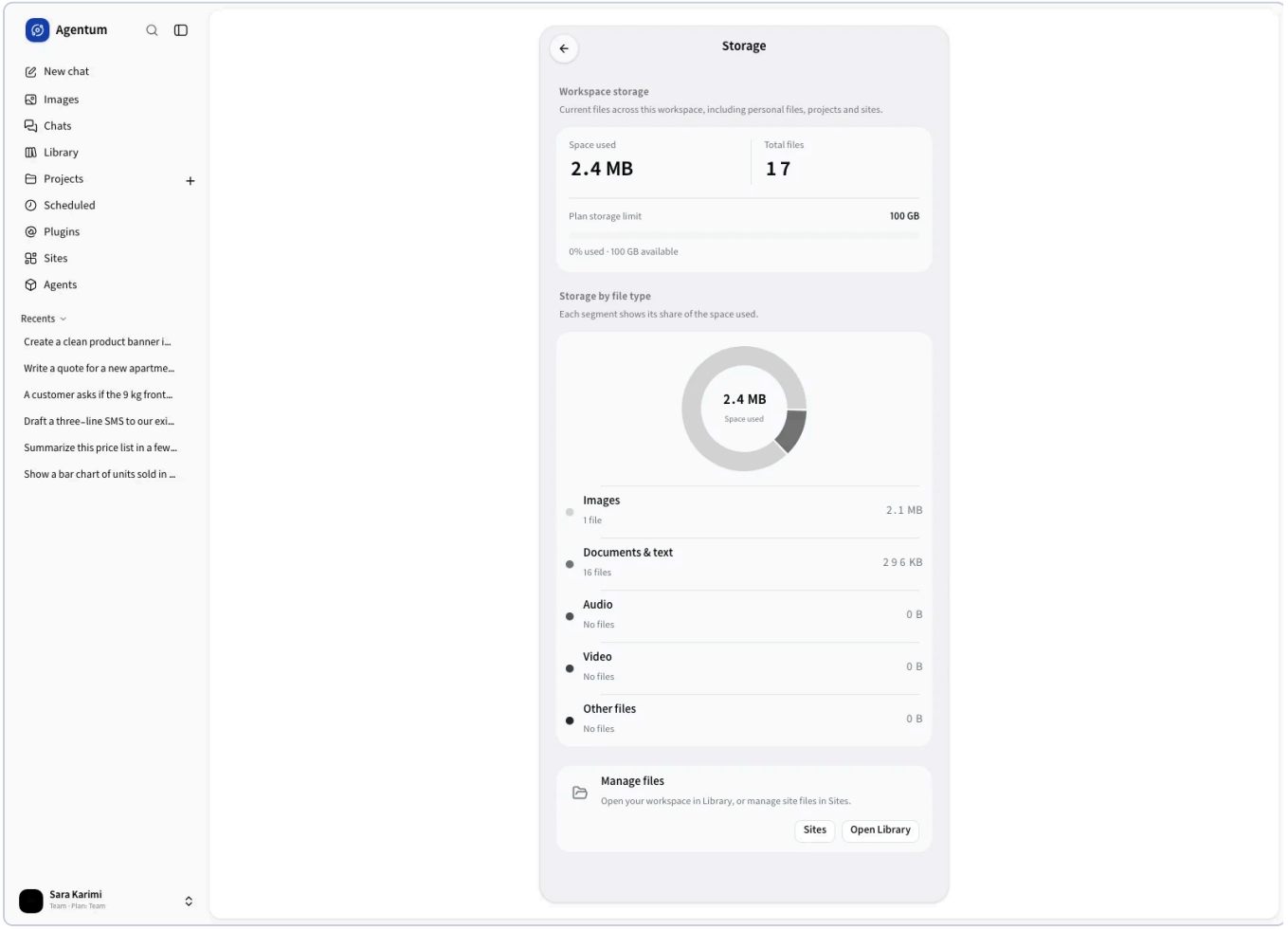
Mina has been saving her daughter's party photos and invitations in Agentum, and wonders how much room is left. See how much file space your workspace uses, what kinds of files take it, and jump to where you manage them.

Before you start

Open the workspace you want to check. The numbers cover all files in it: personal files, projects and sites.

Steps

1. Open Settings, then “Storage”.
2. Under “Workspace storage”, read “Space used” and “Total files”, then “Plan storage limit”. When the plan has a limit, a bar shows the share used and how much is still available. If the limit is passed, the page says how far over it you are. If no limit is set, the usage is shown without a percentage.
3. Under “Storage by file type”, the chart and list split the space into “Images”, “Documents & text”, “Audio”, “Video” and “Other files”, each with its file count and size.
4. Under “Manage files”, select “Open Library” to go to your workspace files in the Library, or “Sites” to manage site files.



The storage page with usage chart and file types

Expected result

You see the used space against your plan limit and the share of each file type. The two buttons take you to the Library or the Sites page.

Troubleshooting

Problem	What to do
“No files stored yet.”	The workspace has no files yet.
“Storage details are unavailable.”	Reload the page and try again later.
“Your files are empty and use no storage.”	Files exist, but their total stored size is zero.
“This plan has no storage allowance.”	Open “Subscription” and select “View plans” to find a plan with storage.
The bar is red	You are over the plan limit. Delete files you no longer need in the Library, or upgrade.

Personalize Agentum

Mina Tavakoli · Homemaker and Nilgoon customer

It is nine in the evening and Mina is planning the month's budget at the kitchen table. The screen is too bright, the buttons are a color she dislikes, and the answers sound like a form letter.

She opens Settings. She switches to dark mode, picks her accent color, sets the language to Farsi, chooses a voice, and asks her default agent to explain things patiently. The next time she asks about the budget, the answer comes back calm and step by step, the way she asked for it.

In this chapter you will learn about "General", "Appearance", "Accent color", "Contrast", "Language", "Keyboard", "Notifications", "Voice settings", "Personalization", "Agent personality", "Conversation starters", "Memory", "Models", "Model", "Plugins in Settings" and "Plugin tools".

General

Purpose

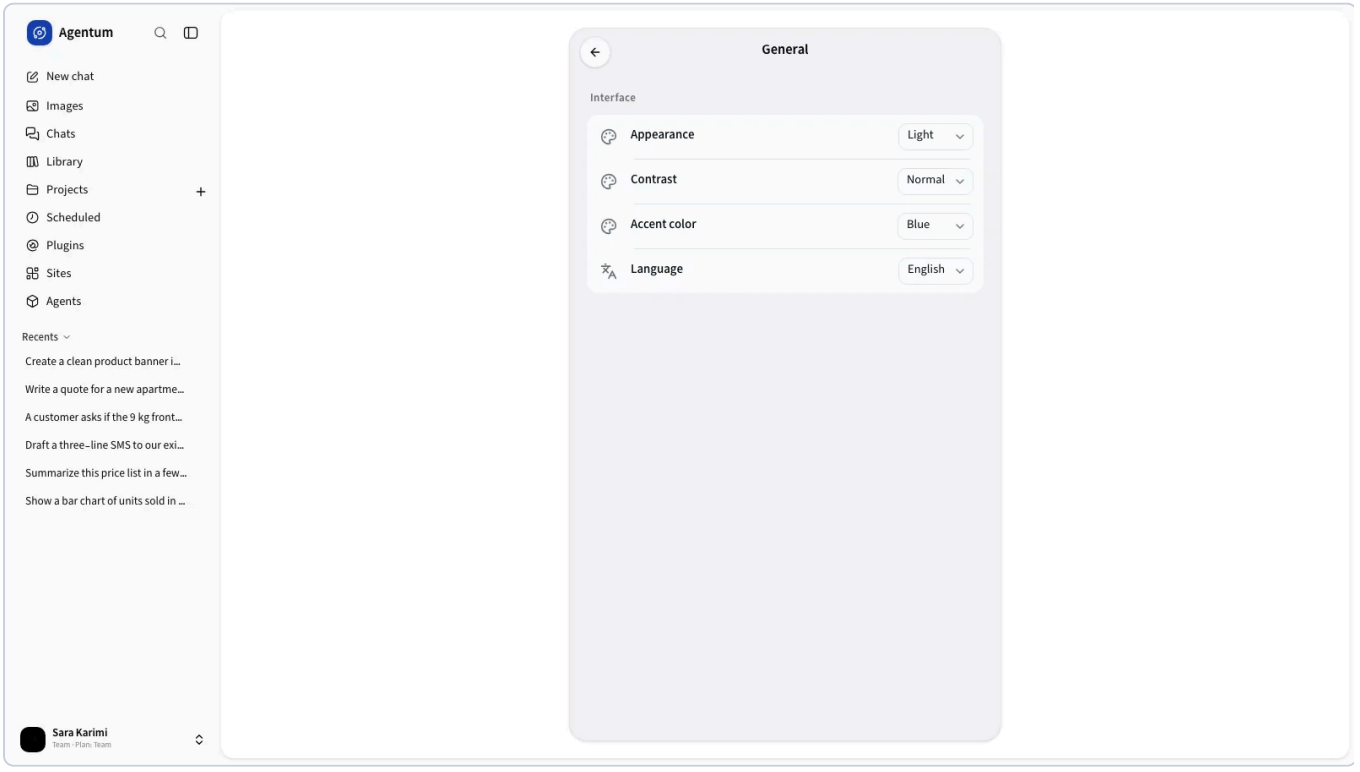
Mina wants Agentum to look and sound the way she likes, without hunting through several pages. General puts the look and the language of the interface in one place.

Before you start

Sign in and select your workspace. This setting is saved for your seat in the current workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard).
2. Under App settings, select General.
3. Under Interface, open the Appearance dropdown and choose System, Light or Dark.
4. Open Contrast and choose Normal or High.
5. Open Accent color and choose a color.
6. Open Language and choose English or Farsi (each is written in its own language). The page refreshes in the new language.



The General page.

Expected result

Each change saves as soon as you make it; there is no Save button. System follows the theme of your device.

Setting	Choices
Appearance	System, Light, Dark
Contrast	Normal, High
Accent color	Blue, Neutral, Green, Purple, Orange
Language	English, Farsi

Troubleshooting

Problem	What to do
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.

Appearance

Purpose

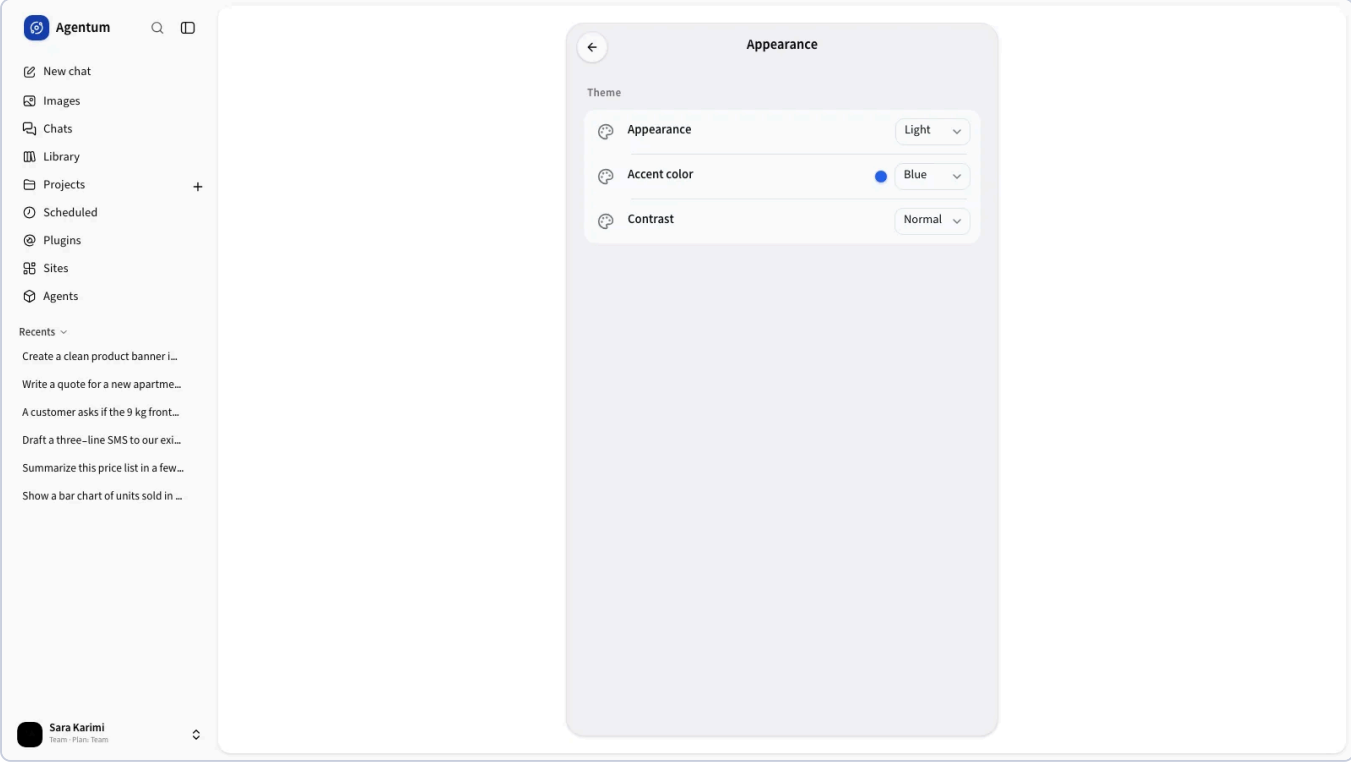
A bright kitchen at noon and a dim living room at night ask for different screens. Choose light or dark mode, the accent color and the contrast of the interface.

Before you start

Sign in and select your workspace. This setting is saved for your seat in the current workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard).
2. Under App settings, select Appearance. The row shows your current mode on the right.
3. Under Theme, open the Appearance dropdown and choose System, Light or Dark.
4. Open the Accent color dropdown and choose a color. A dot beside it shows the current one.
5. Open the Contrast dropdown and choose Normal or High.



The Appearance page.

Expected result

Each change saves as soon as you make it; there is no Save button. System follows the theme of your device.

Setting	Choices
Appearance	System, Light, Dark
Accent color	Blue, Neutral, Green, Purple, Orange
Contrast	Normal, High

Troubleshooting

Problem	What to do
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.

Accent color

Purpose

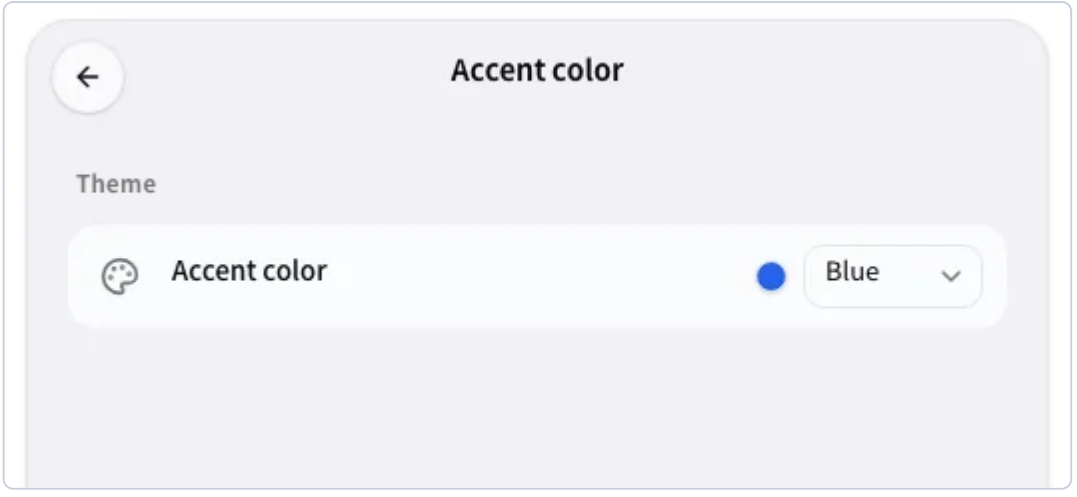
Mina finds the default color of the buttons a little cold for her kitchen screen. Choose the accent color used for buttons and other interface controls.

Before you start

Sign in and select your workspace. This setting is saved for your seat in the current workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard). Then select Appearance.
2. Find the Accent color row under Theme on the Appearance page. A small dot shows the current color.
3. Open the dropdown and pick a color. It saves as soon as you choose it.



The Accent color page.

Expected result

The accent color is one of: Blue, Neutral, Green, Purple or Orange. Controls use the new color once it saves.

Troubleshooting

Problem	What to do
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.

Contrast

Purpose

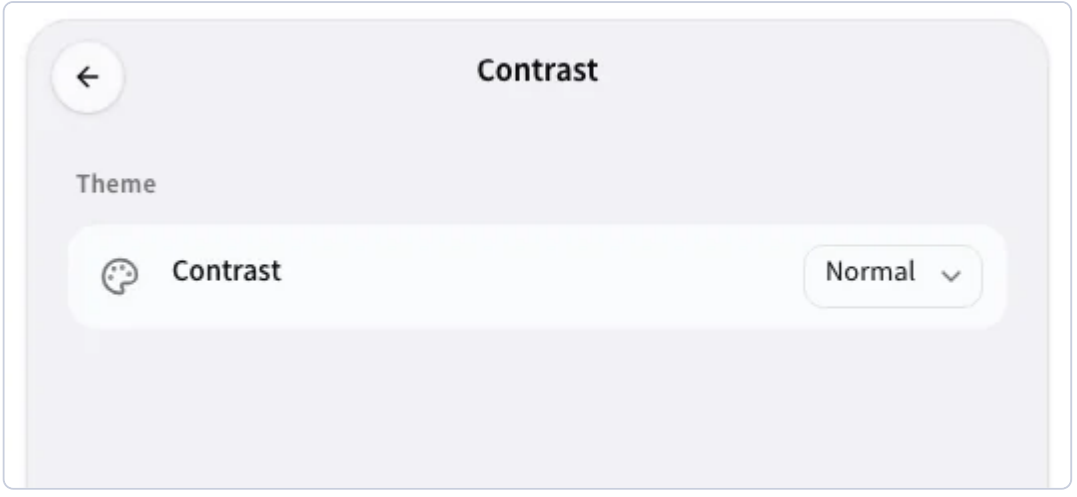
Sara checks the shop’s workspace on her phone at the counter, where the light from the window makes small gray text hard to read. Choose normal or high contrast for the interface.

Before you start

Sign in and select your workspace. This setting is saved for your seat in the current workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard). Then select Appearance.
2. Find the Contrast row under Theme on the Appearance page.
3. Open the dropdown and choose Normal or High. It saves as soon as you choose it.



The Contrast page.

Expected result

The interface uses the contrast you chose: Normal or High.

Troubleshooting

Problem	What to do
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.

Language

Purpose

Mina reads her shopping lists and messages in Farsi, so she wants Agentum in Farsi too. Here you choose the language of the interface, English or Farsi.

Before you start

Sign in and select your workspace. This setting is saved for your seat in the current workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard).
2. Under App settings, select Language. The row shows the current language.
3. Open the Language dropdown and choose English or Farsi (each is written in its own language).



The Language page.

Expected result

The choice saves immediately and the page refreshes in the new language, including the reading direction (Farsi reads right to left). The same dropdown is also on the General page, and the account menu in the sidebar has a Language row where you can choose English or Farsi.

Troubleshooting

Problem	What to do
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.
I do not see Arabic or other languages	Agentum shows only English and Farsi.

Keyboard

Purpose

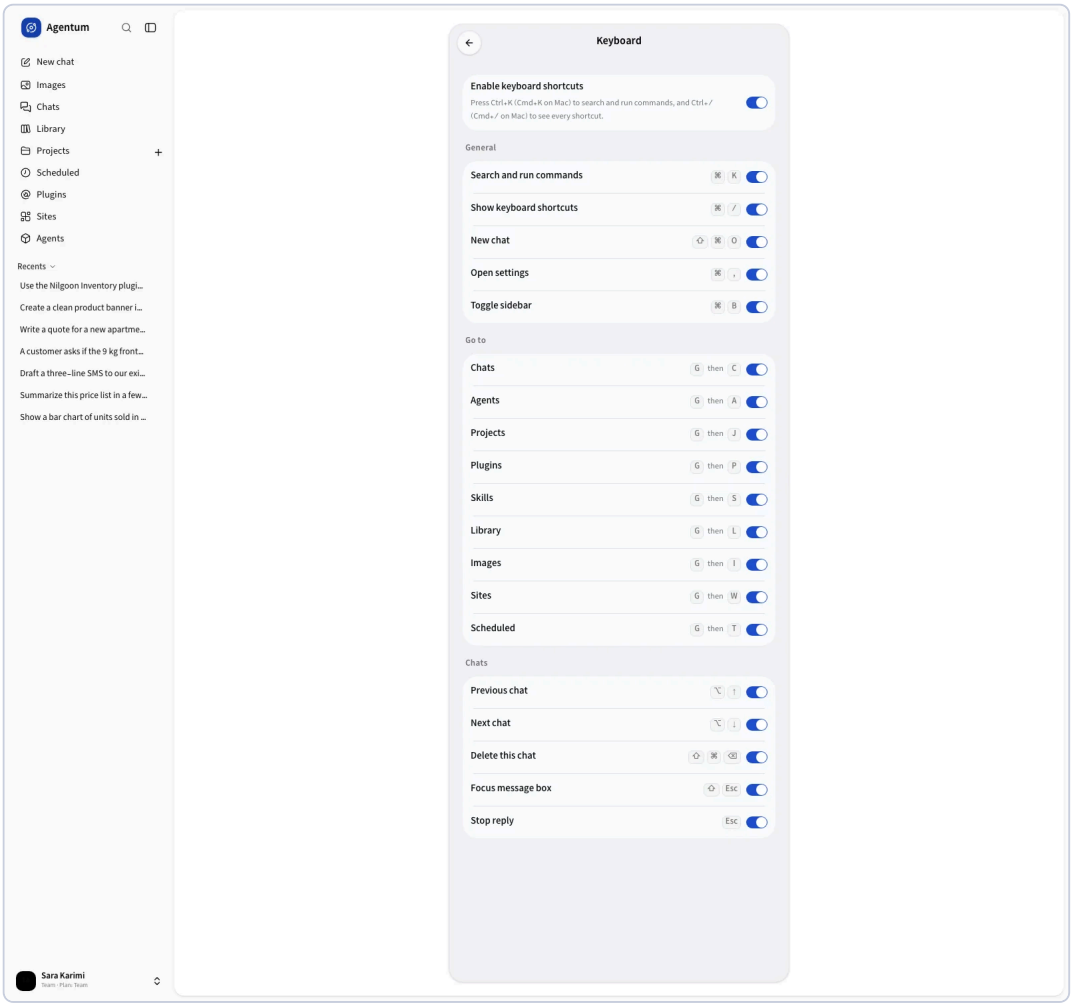
Neda works on the keyboard all day and wants a shortcut for a new chat, but sometimes she presses a shortcut by accident. Turn keyboard shortcuts on or off, all together or one by one.

Before you start

Sign in and select your workspace. This setting is saved for your seat in the current workspace. On Mac, shortcuts use Cmd and Option; on other computers they use Ctrl and Alt.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard).
2. Under App settings, select Keyboard. The row shows On or Off.
3. Use Enable keyboard shortcuts to turn every shortcut on or off. Its description says: press Ctrl+K (Cmd+K on Mac) to search and run commands, and Ctrl+/ (Cmd+/ on Mac) to see every shortcut.
4. Below it, three groups list each shortcut with its keys and a switch: General, Go to and Chats. Switch off any shortcut you do not want.
5. When Enable keyboard shortcuts is off, all the individual switches are off and cannot be changed.



The Keyboard page.

Expected result

Changes save as soon as you make them; there is no Save button. These are the shortcuts (Cmd replaces Ctrl on Mac, Option replaces Alt):

Group	Action	Keys
General	Search and run commands	Ctrl+K
General	Show keyboard shortcuts	Ctrl+/
General	New chat	Ctrl+Shift+O
General	Open settings	Ctrl+,
General	Toggle sidebar	Ctrl+B
Go to	Chats, Agents, Projects, Plugins, Skills, Library, Images, Sites, Scheduled	G then C, A, J, P, S, L, I, W, T (in that order)
Chats	Previous chat	Alt+Up
Chats	Next chat	Alt+Down
Chats	Delete this chat	Ctrl+Shift+Backspace
Chats	Focus message box	Shift+Esc
Chats	Stop reply	Esc

Troubleshooting

Problem	What to do
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.
A shortcut does nothing	Check that Enable keyboard shortcuts and the switch for that shortcut are both on. Plain-key shortcuts such as G then C do not run while you are typing in a text box or while a dialog is open.

Notifications

Purpose

While she serves customers at the counter, Sara wishes Agentum would stay quiet. The page has an in-app notifications switch; for now it saves your preference but does not yet change what you receive.

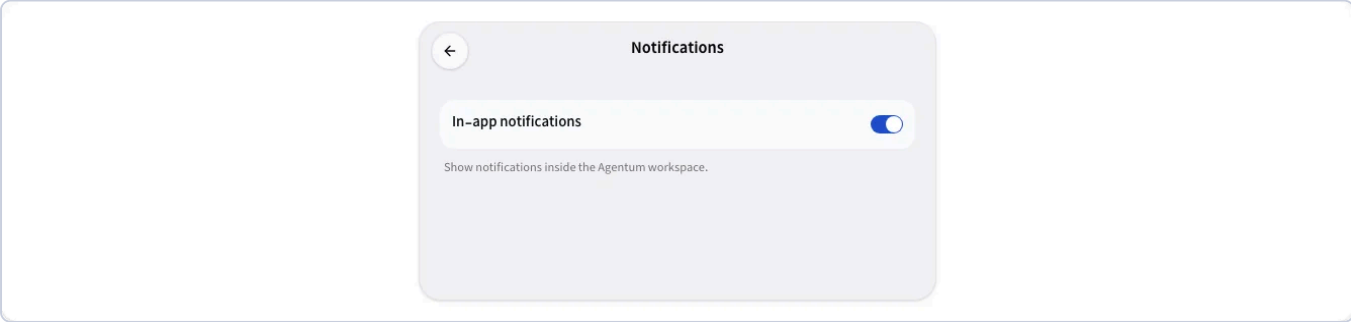
Before you start

Sign in and select your workspace. This setting is saved for your seat in the current workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard).
2. Under App settings, select Notifications. The row shows On or Off.
3. Switch In-app notifications on or off. Its description reads “Show notifications inside the Agentum workspace.”

Changing this switch currently changes only the saved preference and the On or Off shown in the Settings list; it does not yet turn notifications on or off.



The Notifications page.

Expected result

The switch saves as soon as you flip it; there is no Save button. The Notifications row in the Settings list shows On or Off to match.

Troubleshooting

Problem	What to do
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.

Voice settings

Purpose

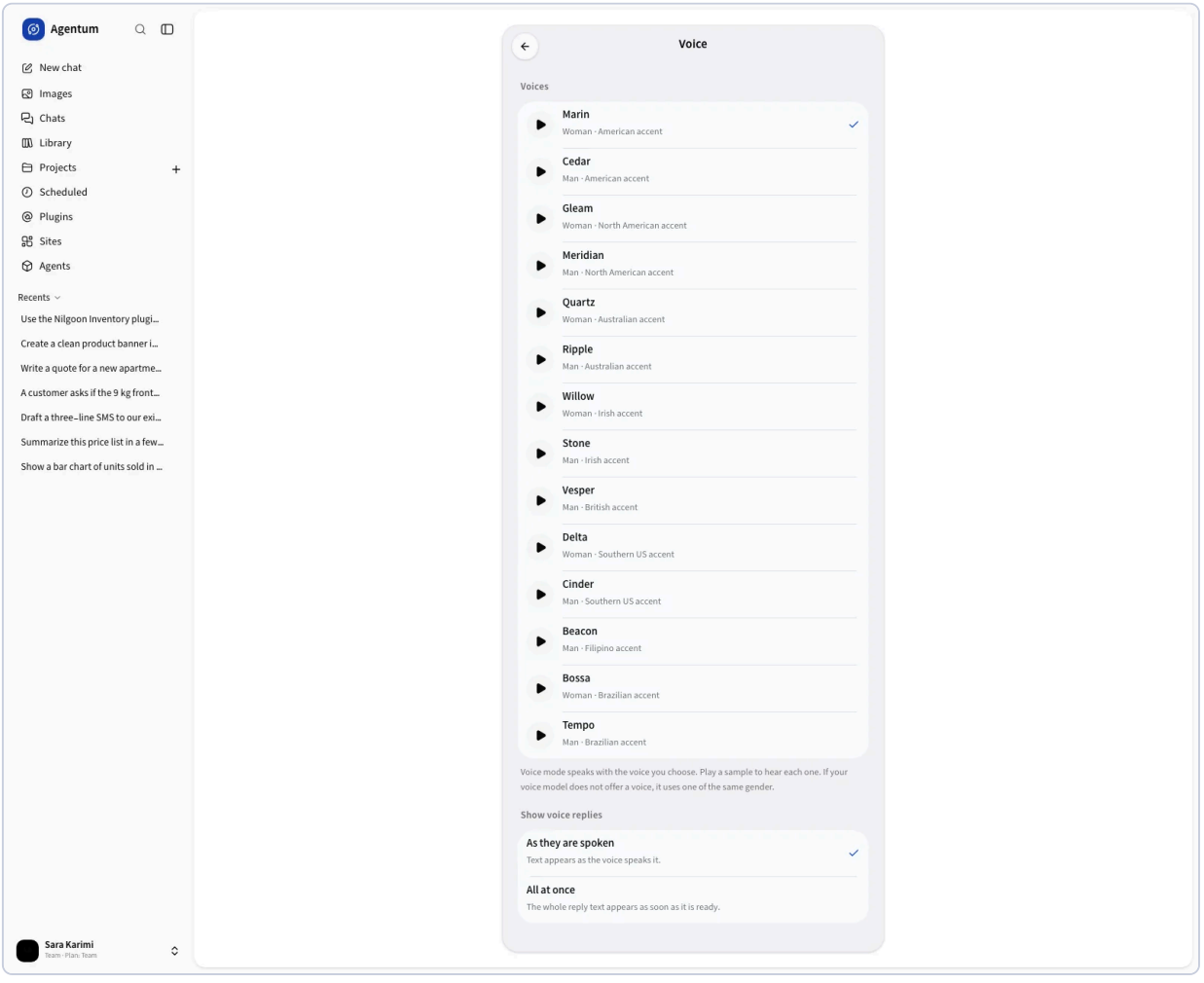
When Mina asks Agentum a question out loud while cooking, she wants a voice she likes to answer. Choose the voice Agentum speaks with in voice mode, and decide how voice replies are shown as text.

Before you start

Use a browser that can play sound. The choice applies to your own seat.

Steps

1. Open Settings, then “Voice”. The row on the Settings home shows the voice you picked.
2. Under “Voices”, pick one of 14 voices. Each row says whether it is a woman or a man and its accent. Select the play button (“Play [name]”) to hear a sample in the language of your interface; select it again (“Stop”) to stop. Only one sample plays at a time.
3. Select a row to make it your voice; a check mark shows the current one.
4. Under “Show voice replies”, choose “As they are spoken” (text appears as the voice speaks it) or “All at once” (the whole reply text appears as soon as it is ready).



The voice page with voices and caption options

Expected result

Your choice is saved at once. The next voice session speaks with that voice and shows text the way you chose. If your voice model does not offer the voice, it uses one of the same gender.

Troubleshooting

Problem	What to do
A sample does not play	Check your device sound and browser permissions, then try again.
A sample stops by itself	Starting another sample or leaving the page stops the current one.
The voice sounds different from the sample	The model may use a voice of the same gender when it does not offer yours.
“Could not save settings.”	Select the voice again once your connection is back.

Personalization

Purpose

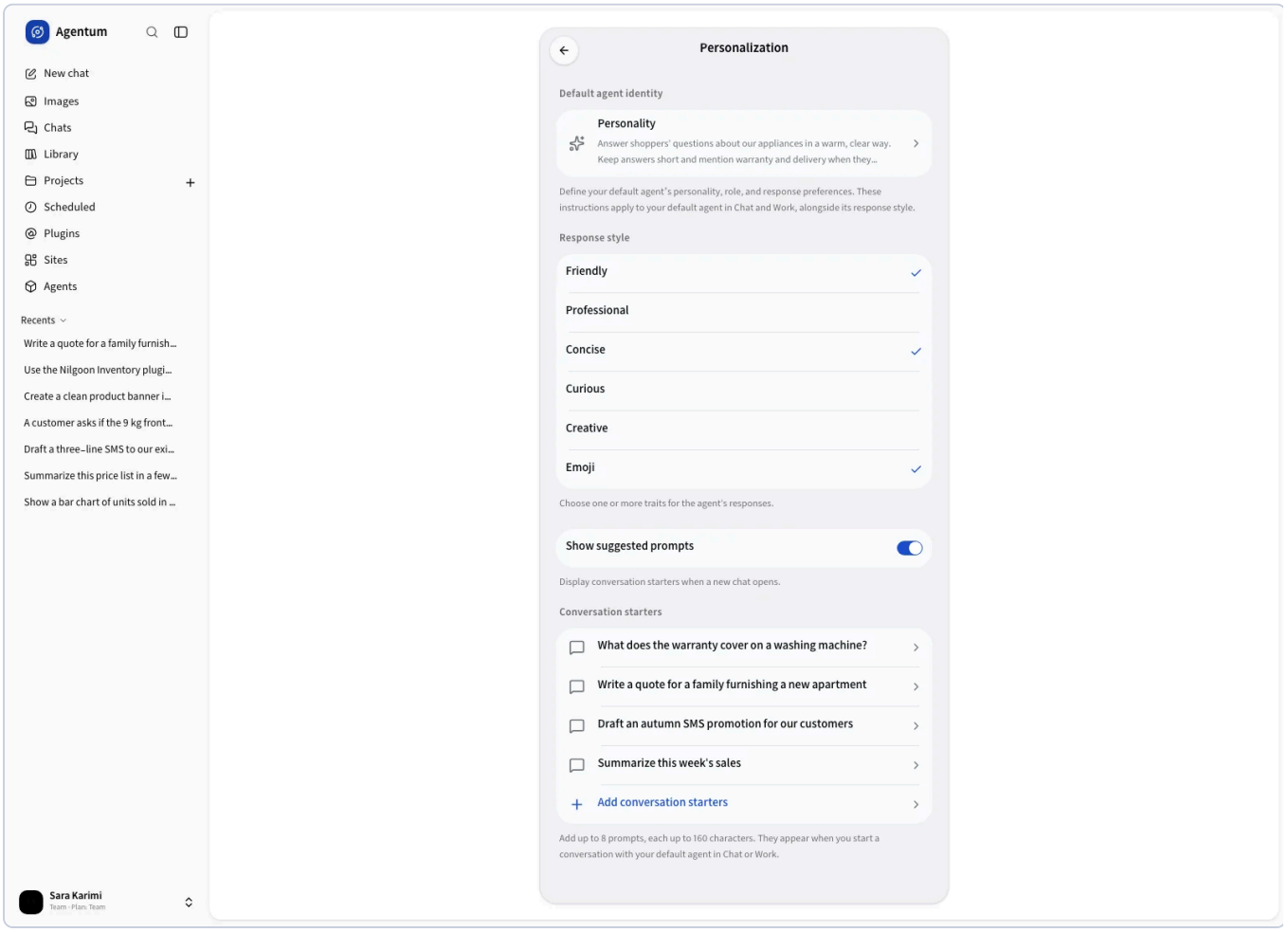
Mina would like every new chat to open the way she likes: patient answers and her usual questions already waiting. Shape how your default agent answers: its personality, its response style and the conversation starters shown in a new chat.

Before you start

Open the workspace you want. These choices apply to your own seat in the current workspace and to the default agent in Chat and Work. Agents you create have their own settings.

Steps

1. Open Settings, then “Personalization”.
2. Under “Default agent identity”, select “Personality” to write or pick the agent’s personality (see “Agent personality”). Its first lines show here once set.
3. Under “Response style”, tick any of “Friendly”, “Professional”, “Concise”, “Curious”, “Creative” and “Emoji”. You can choose several. “Emoji” is on unless you turn it off.
4. Turn “Show suggested prompts” on to display conversation starters when a new chat opens.
5. Under “Conversation starters”, select a starter to edit it, or “Add conversation starters” to add one. You can keep up to 8, each up to 160 characters.



The personalization page with response style and conversation starters

Expected result

Each tick and switch is saved at once; there is no Save button on this page. New chats follow your choices.

Troubleshooting

Problem	What to do
“Could not save settings.”	Check your connection and change the setting again.
No starters appear in a new chat	Turn on “Show suggested prompts” and make sure you have at least one starter.
“Add conversation starters” is missing	You already have 8 starters. Remove one first.
A custom agent ignores these choices	These settings are for the default agent only. Edit the custom agent instead.

Agent personality

Purpose

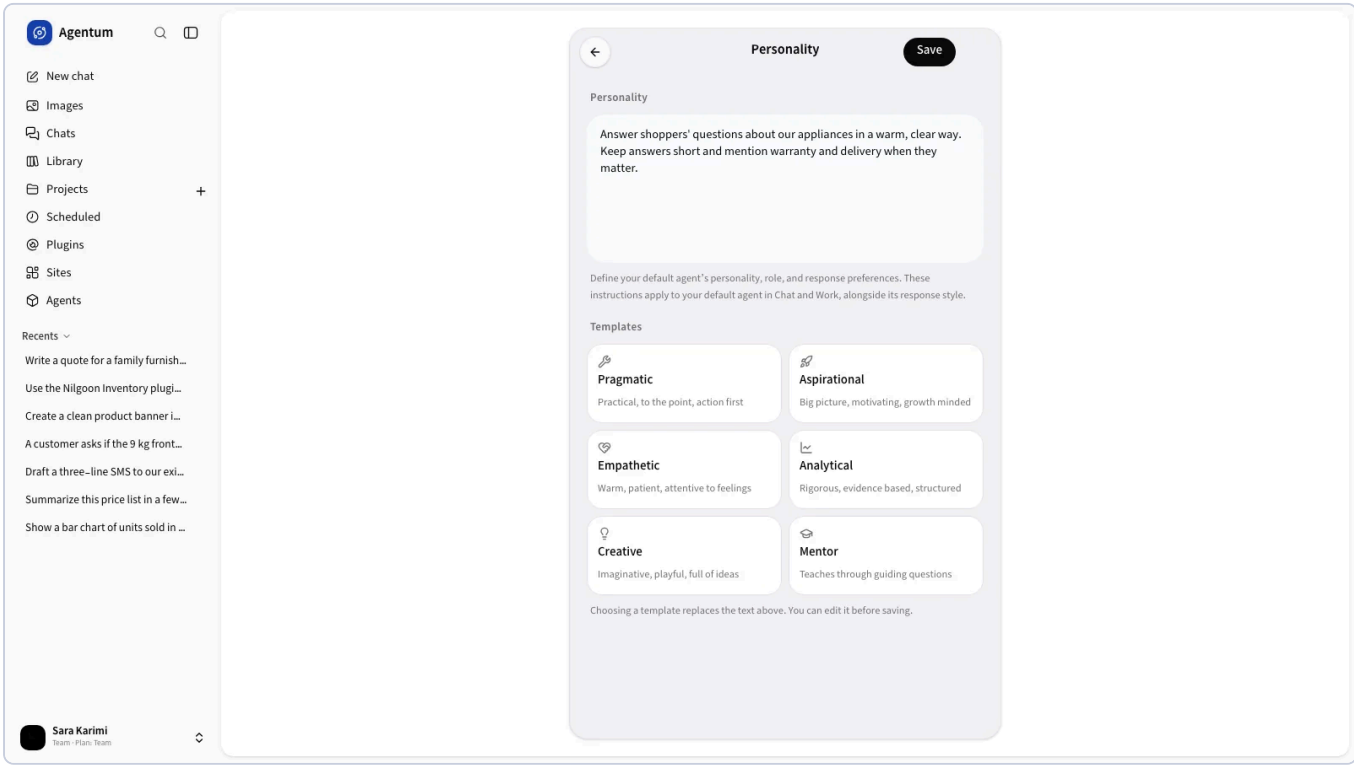
Some people want short, direct answers; Mina prefers a patient explanation. Describe the personality, role and response preferences of your default agent in your own words, or start from a ready-made template.

Before you start

Open the workspace you want. The text applies to your default agent in Chat and Work, together with your response style. It does not change agents you created yourself.

Steps

1. Open Settings, then “Personalization”, then “Personality”.
2. Write the instructions in the text box, up to 4000 characters. For example: “Answer shoppers’ questions about our appliances in a warm, clear way. Keep answers short and mention warranty and delivery when they matter.”
3. Or pick a card under “Templates”: “Pragmatic”, “Aspirational”, “Empathetic”, “Analytical”, “Creative” or “Mentor”. The card replaces the text above, and you can still edit it. The chosen card shows a check mark.
4. Select “Save” at the top. The button is available only after you change the text.



The personality page with the text box and templates

Expected result

You return to Personalization, where the first lines of your text appear under “Personality”. New chats with the default agent follow it.

Troubleshooting

Problem	What to do
“Save” is disabled	The text is unchanged. Edit it first.
“Check your entries and try again.”	The text is too long. Keep it within 4000 characters.
“Could not save settings.”	Keep the page open and save again when the connection is back.
You want the agent to behave the old way	Clear the box and save.

Conversation starters

Purpose

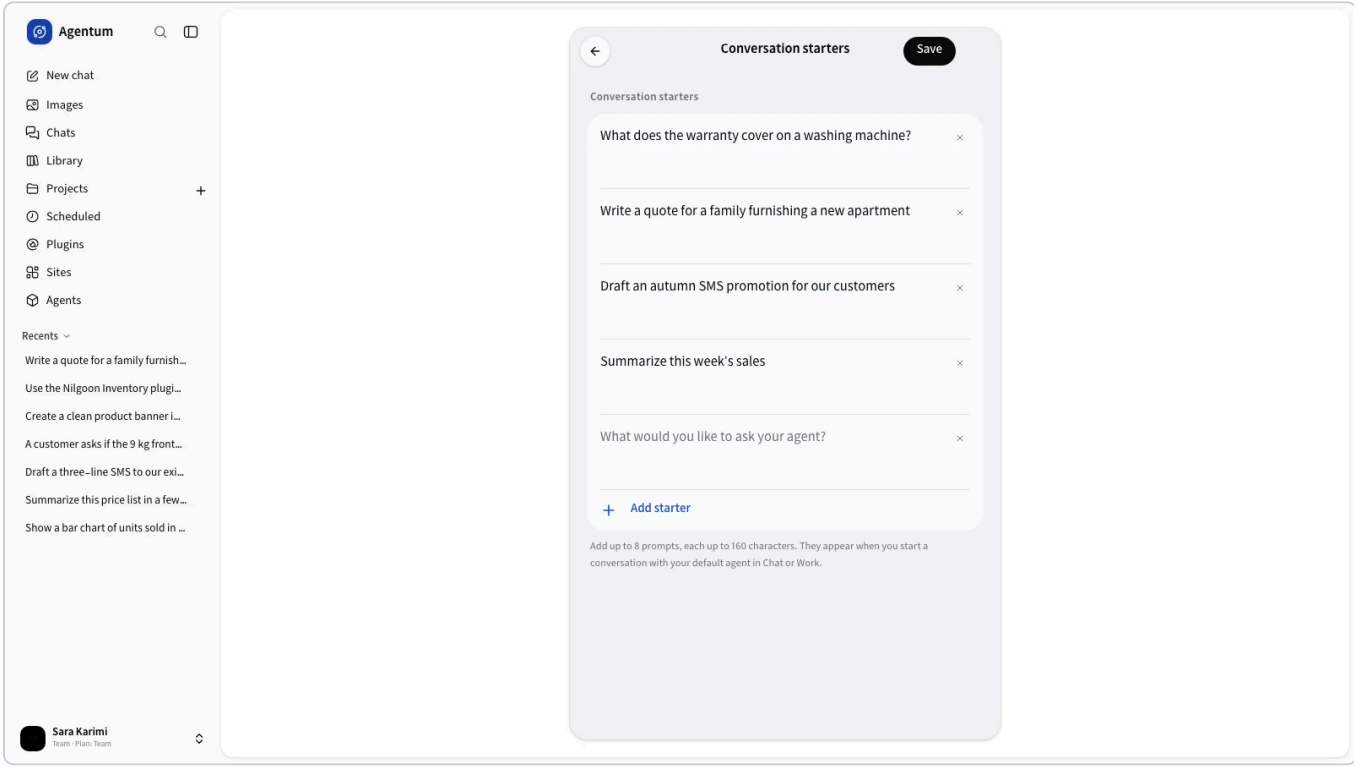
Every week Mina asks Agentum the same few things, such as planning the month’s budget. Write up to eight prompts that appear when you start a conversation with your default agent in Chat or Work.

Before you start

Sign in and select your workspace. Starters are saved for your seat. The Show suggested prompts switch on the Personalization page controls whether conversation starters are displayed when a new chat opens.

Steps

1. Open Personalization from the account menu in the sidebar (or Settings, then Personalization).
2. Under Conversation starters, select an existing starter, or select Add conversation starters (shown while you have fewer than eight).
3. In the editor, type one prompt per box, up to 160 characters each. The placeholder reads “What would you like to ask your agent?”
4. To add another box, select Add starter. It disappears once there are eight boxes.
5. To remove a prompt, select the x beside it (Remove starter [number]).
6. Select Save at the top. Empty boxes are dropped and spaces around each prompt are trimmed.



Editing your conversation starters.

Expected result

Your saved list has at most eight non-empty prompts, and you return to the previous page. Saving an empty list is allowed if you removed every prompt.

Troubleshooting

Problem	What to do
Save is greyed out	Save is enabled only when the list differs from what is saved, and it is disabled while saving.
Add starter is missing	You already have eight boxes. Remove one to make room.
The message “Check your entries and try again.” appears	A prompt is not valid, for example too long. Shorten it to 160 characters or fewer and save again.
The message “Could not save settings.” appears	Check your connection and try again.

Memory

Purpose

Neda wonders whether Agentum remembers what she told it last week. The page has an Allow memory switch; for now it saves your preference but does not control memory or delete anything remembered.

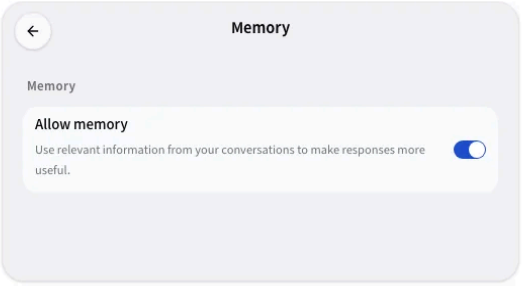
Before you start

Sign in and select your workspace. This setting is saved for your seat in the current workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard).
2. Under Customization, select Memory.
3. Switch Allow memory on or off. Its description reads “Use relevant information from your conversations to make responses more useful.”

This switch saves a preference but does not currently control memory use or delete remembered information.



The Memory page.

Expected result

The switch saves as soon as you flip it; there is no Save button. You can change it again at any time.

Troubleshooting

Problem	What to do
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.

Models

Purpose

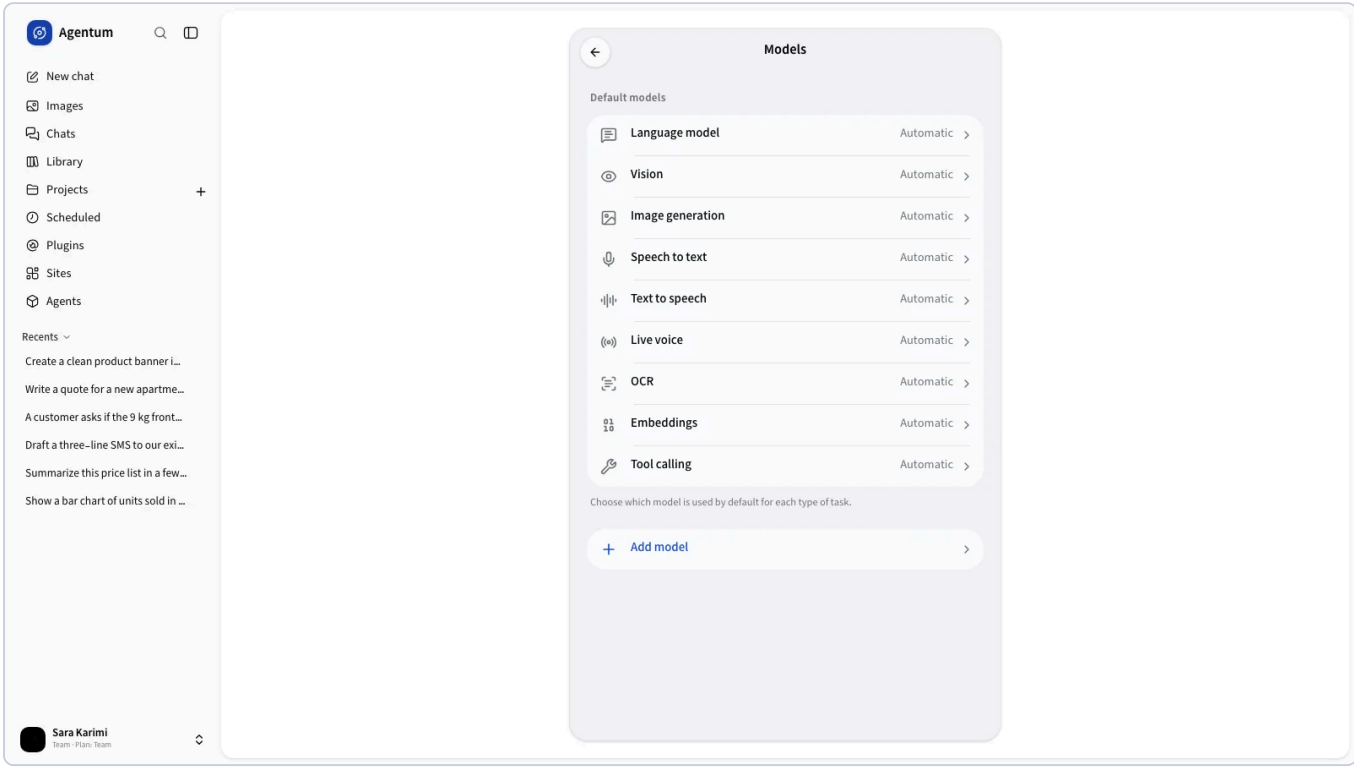
Kian wants one model for everyday chats and another for the shop’s pictures. Choose which model Agentum uses by default for each type of task, or leave it on Automatic.

Before you start

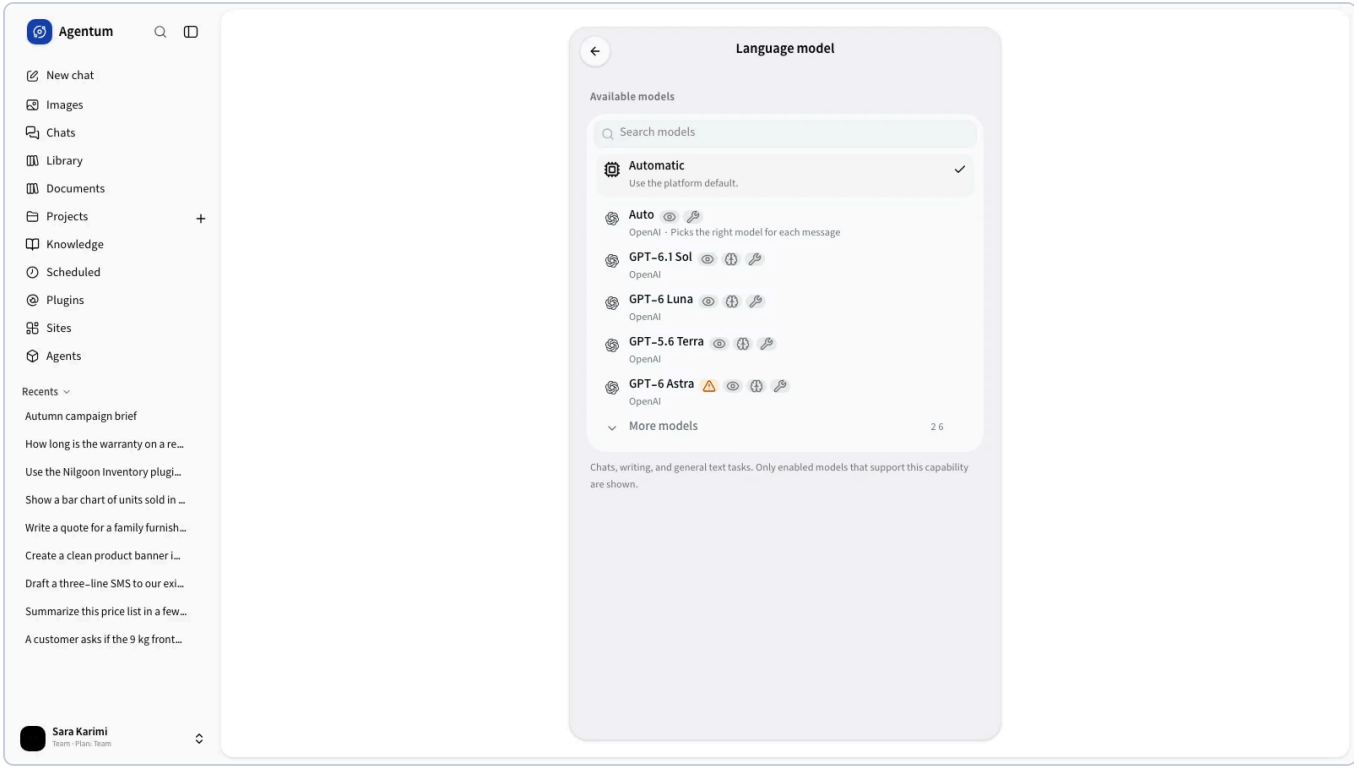
Sign in and select your workspace. This setting is saved for your seat in the current workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard).
2. Under Customization, select Models.
3. Under Default models, each row is a type of task and shows the model currently chosen, “Automatic” when you have not chosen one, or “Unavailable model” if the saved model is no longer available.
4. Select a row, for example Language model. The page opens a list called Available models.
5. Choose Automatic to use the platform default, or choose one of the models listed. The choice saves as soon as you select it.
6. To narrow a long list, type in “Search models”. If nothing matches, the list says “No models match your search.” (clear or change the text). Select “More models” to show the rest of the models. Each model can show icons for what it can do (for example vision, tools or reasoning) or that it uses your quota quickly.
7. Go back to the Models list. To add a model of your own, select Add model (see the Model article).



Default models for each type of task.



Choosing the default language model.

Expected result

Your choice is saved for that type of task. The types are:

Type of task	What it covers
Language model	Chats, writing, and general text tasks
Vision	Understand images shared in conversations
Image generation	Create and edit images
Speech to text	Transcribe voice and audio
Text to speech	Generate spoken audio
Live voice	Real-time voice conversations
OCR	Extract text from images and documents
Embeddings	Search and semantic retrieval
Tool calling	Select and run connected tools

For Image generation, Automatic follows the chat model. Only enabled models that support the type of task are listed.

The saved defaults for Vision, Embeddings and Tool calling are shown here, but choosing a model for these three currently has no effect on how Agentum works.

These defaults do not replace a model already selected in a conversation or a custom agent's model. New web chats may start with your first usable favorite or previous model selection; check the model shown in the message box.

Troubleshooting

Problem	What to do
The list says “No compatible models”	No available model supports that type of task. Add a model with that capability using Add model, or ask a workspace owner or admin.
A row says “Unavailable model”	The saved model is no longer available. Choose Automatic or an available model for that task. If saving still fails, clear other unavailable defaults too, because all saved defaults are checked together.
“Some settings could not be loaded.”	Select “Retry”.
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.

Model

Purpose

Kian already has access to a model he trusts and would like to use it in Agentum. Add a model of your own, or edit one you already added, so it can be chosen as a default model and in chats.

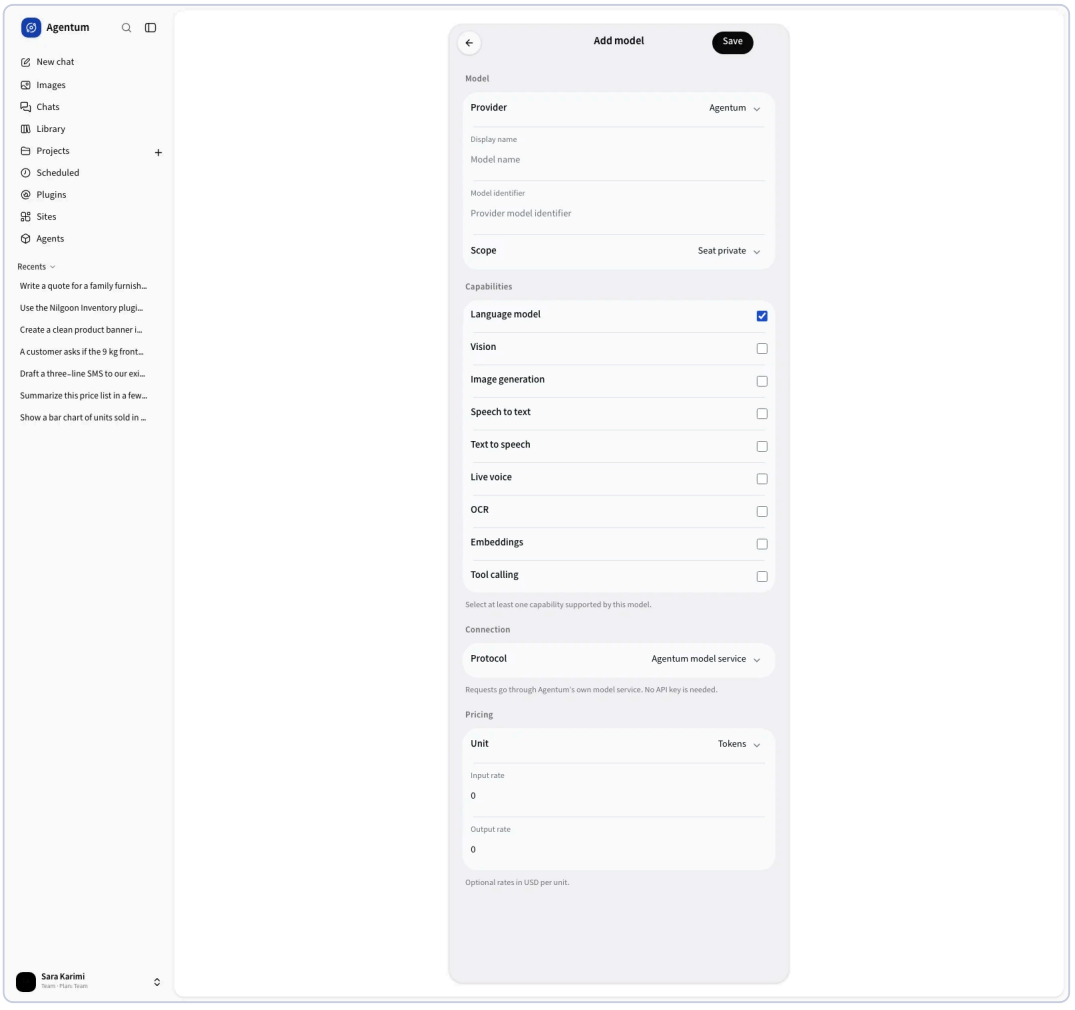
Before you start

Sign in and select your workspace. You need permission to use models. Sharing a model with the workspace also requires permission to manage workspace models. Ask your administrator if access is denied.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard). Under Customization, select Models, then Add model.
2. Choose a Provider from the dropdown.
3. Enter a Display name (up to 200 characters) and the Model identifier (up to 200 characters), the identifier the provider uses for the model.
4. Choose the Scope: Seat private (only you) or Workspace (everyone in the workspace).
5. Under Capabilities, tick at least one type of task the model supports.
6. Under Connection, use the connection option supplied for your model and enter any required address (Base URL) and access key (API key). The API key can contain up to 1,000 characters.
7. Under Pricing, optionally choose a Unit (Tokens, Characters, Seconds, Requests or Images) and enter an Input rate and Output rate. Enter non-negative rates in $ per unit.
8. Select Save at the top.

To edit an existing model, open its page. Provider and Scope are read-only; change the other fields and select Save. Leave the API key field empty to keep the existing key.



Adding a model.

Expected result

You return to the Models page. The model is saved. It appears in compatible model lists only when your plan and workspace permissions allow it; an administrator may need to permit it.

Troubleshooting

Problem	What to do
Save is greyed out	Save needs a provider, a Display name, a Model identifier and at least one capability. If your connection option needs a Base URL and an API key, those are required too.
The Provider dropdown says “No providers available”	No provider can be used for new models right now. Try again later or ask a workspace owner or admin.
“Check the model details.”	One of the fields is not valid. Check the Base URL and the rates.
The error says you cannot add workspace models	Switch Scope to Seat private, or ask your administrator to add it or to grant the permission.
“Unable to save model.”	Check your connection and try again.
“This model is no longer available.” or “Model details could not be loaded.”	The model was removed or cannot be read. Go back to Models and try again.
“You do not have permission to edit this model.”	Ask your administrator for access.
“Some settings could not be loaded.”	Select “Retry”.

Plugins in Settings

Purpose

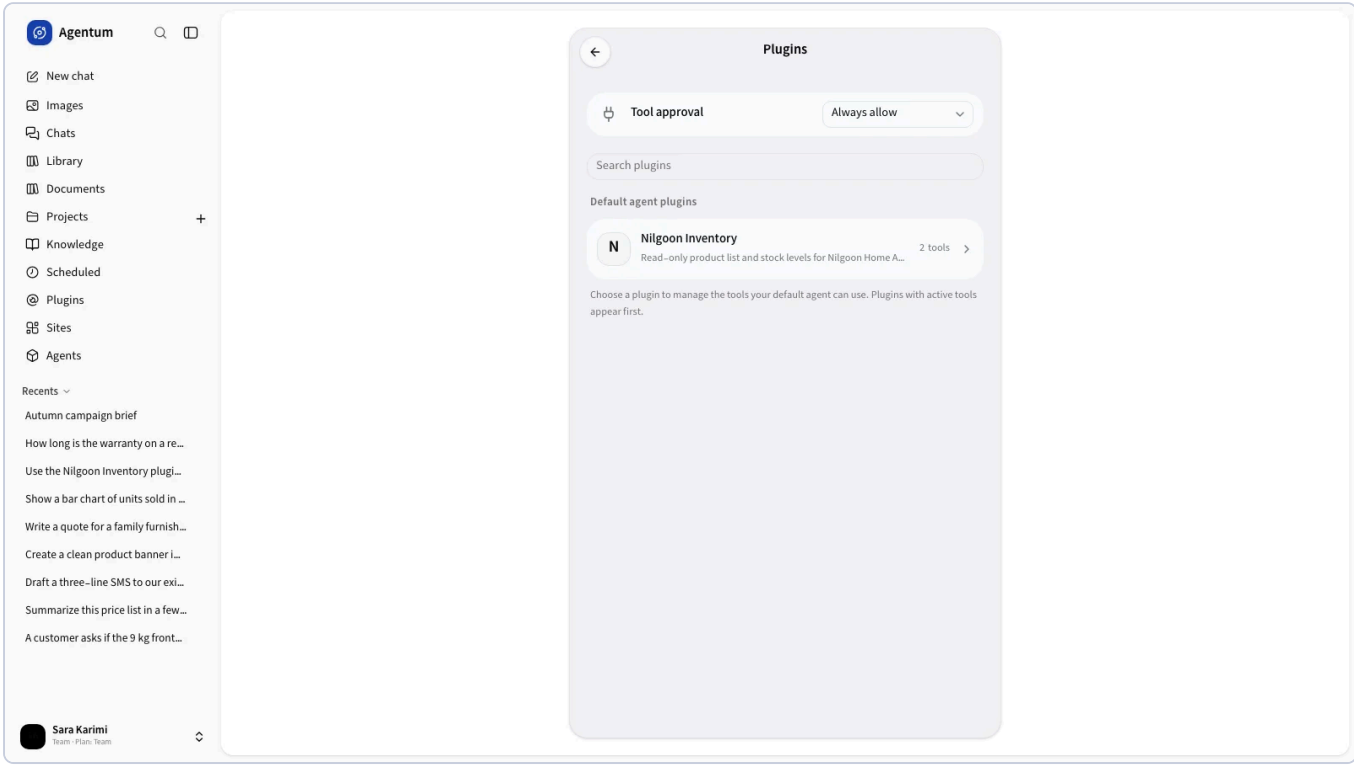
Once the shop’s tools are connected, you decide how freely your default agent may use them. Open a connected plugin to pick the tools your default agent may use, and choose whether Agentum asks before it runs a plugin tool.

Before you start

Connect at least one plugin first, from the Plugins page. Only connected plugins are listed here.

Steps

1. Open Settings, then “Plugins”. The row on the Settings home shows how many connected plugins have at least one tool enabled for your default agent.
2. Under “Tool approval”, choose “Always allow” (the default), “Always ask”, “Allow read actions” or “Allow low-risk actions”. The choice is saved at once. In ordinary chats, “Always allow” never asks for approval, “Always ask” asks before every tool call of a connected plugin, and the other two choices ask before any plugin tool call (a plugin’s tools are never treated as read-only, so these two behave the same). The request appears as a card in the message with “Approve” and “Reject”. In Chat Automation on Telegram, “Always ask” requires your approval for every tool call, while the other three choices skip approval only for read-only calls.
3. Type in “Search plugins” to narrow the list. Search text can contain up to 200 characters.
4. Under “Default agent plugins”, each connected plugin shows its name, description and how many tools are active. Plugins with active tools come first. Select one to open its tools.
5. If the list says “No connected plugins”, connect plugins from the Plugins page.



Settings plugins page with tool approval and connected plugins

Expected result

Each plugin row opens the tool list for that plugin.

Troubleshooting

Problem	What to do
“No connected plugins”	Connect a plugin from the Plugins page, then come back.
“No matching plugins”	Clear or change the search text.
Plugin list is still loading	Wait for “Searching plugins…” to finish; more plugins load as you scroll.
A connected plugin is missing from the list	Clear the search text, check that the plugin is connected in the current workspace, and retry loading (see the next row).
“Some settings could not be loaded.”	Select “Retry”. Until it loads, an empty list does not mean the plugin is disconnected.
You expected these choices to apply to an agent you created	Agents you create keep their own tool settings; this page is for the default agent.

Plugin tools

Purpose

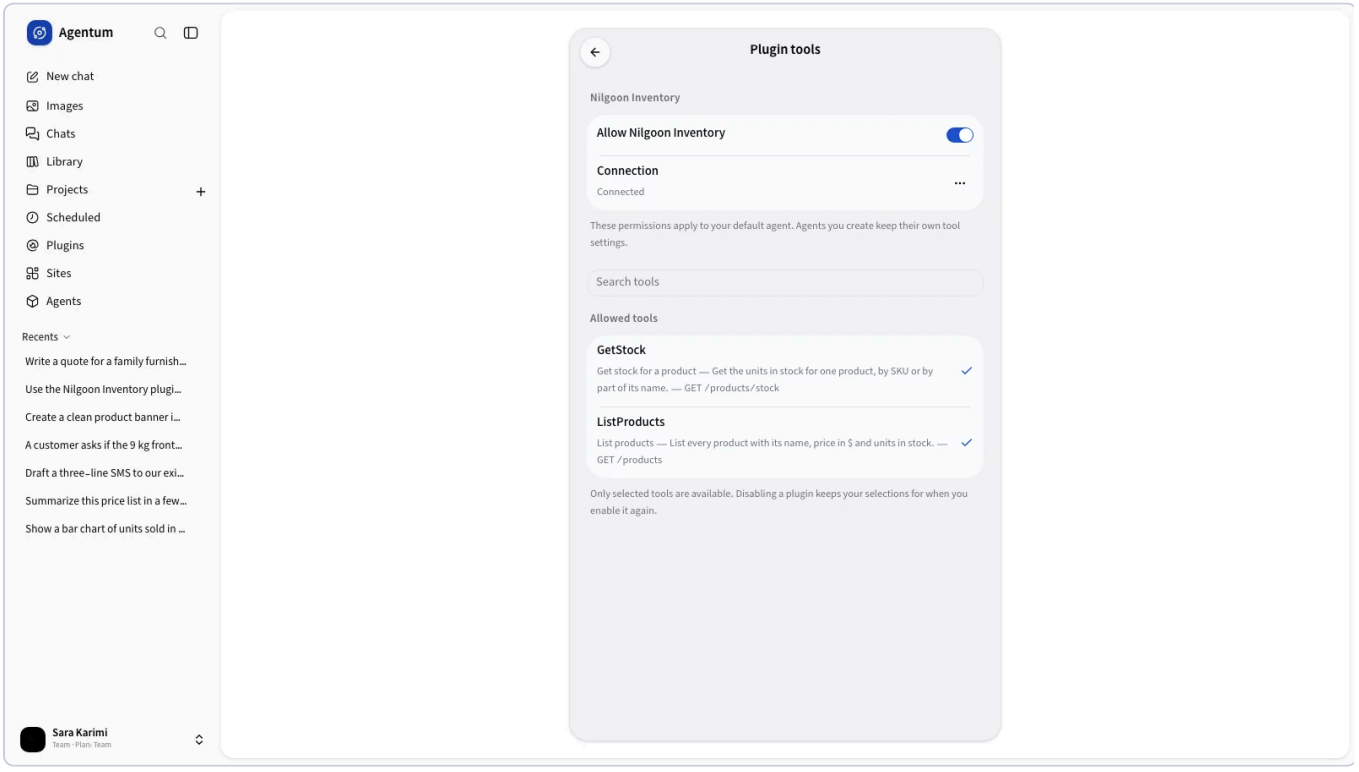
You may want your default agent to look up stock but never change a price. Allow or block a connected plugin for your default agent, and pick exactly which of its tools it may use.

Before you start

The plugin must be connected. Open it from Settings, then “Plugins”. These permissions apply to your default agent; agents you create keep their own tool settings.

Steps

1. Open Settings, then “Plugins”, then select the plugin (its row is labeled “[plugin] tools”).
2. Use the “Allow [plugin]” switch to turn the plugin on or off. Turning it off keeps your tool choices for later.
3. Under “Connection”, the plugin shows “Connected”. Select the actions button (“Actions for [plugin]”) to see the connection and, if you wish, select “Disconnect [plugin]”. Disconnecting removes the connection itself, so the plugin is no longer available to future agent runs until you connect it again; turning off “Allow [plugin]” only stops your default agent from using it. If disconnecting fails, an error is shown: try again.
4. Type in “Search tools” to find a tool. Search text can contain up to 200 characters.
5. Under “Allowed tools”, tick the tools the agent may use. Selected tools are listed first. More tools load as you scroll.



A plugin’s tool list with allow switch and ticked tools

Expected result

Choices are saved at once. Only the ticked tools are available to the default agent. Which plugins and tools are enabled decides what the agent can use.

Troubleshooting

Problem	What to do
“Plugin not connected”	Connect the plugin from the Plugins page first.
Tools are greyed out	Turn on the “Allow [plugin]” switch.
“No matching tools”	Change the search text.
“No tools available”	The plugin offers no tools right now.
“Some settings could not be loaded.”	Select “Retry”. An empty page can otherwise look like a disconnected plugin.

Telegram

Neda Rahimi · Office and customer support

By ten in the morning Neda has answered the same Telegram question five times: when will my refrigerator arrive, and does the warranty cover the compressor? Customers write all day, and she cannot sit at a desk for every message.

She connects Telegram to Agentum, opens the official bot on her phone, then turns on Chat Automation. She writes a few short rules for how the shop sounds and picks the tools her agent may use. Routine questions get answered, and anything that needs her approval waits for her.

In this chapter you will learn about “Telegram in Settings”, “Telegram Application Bot”, “Chat Automation”, “Chat Automation instructions” and “Chat Automation plugins and tools”.

Telegram in Settings

Purpose

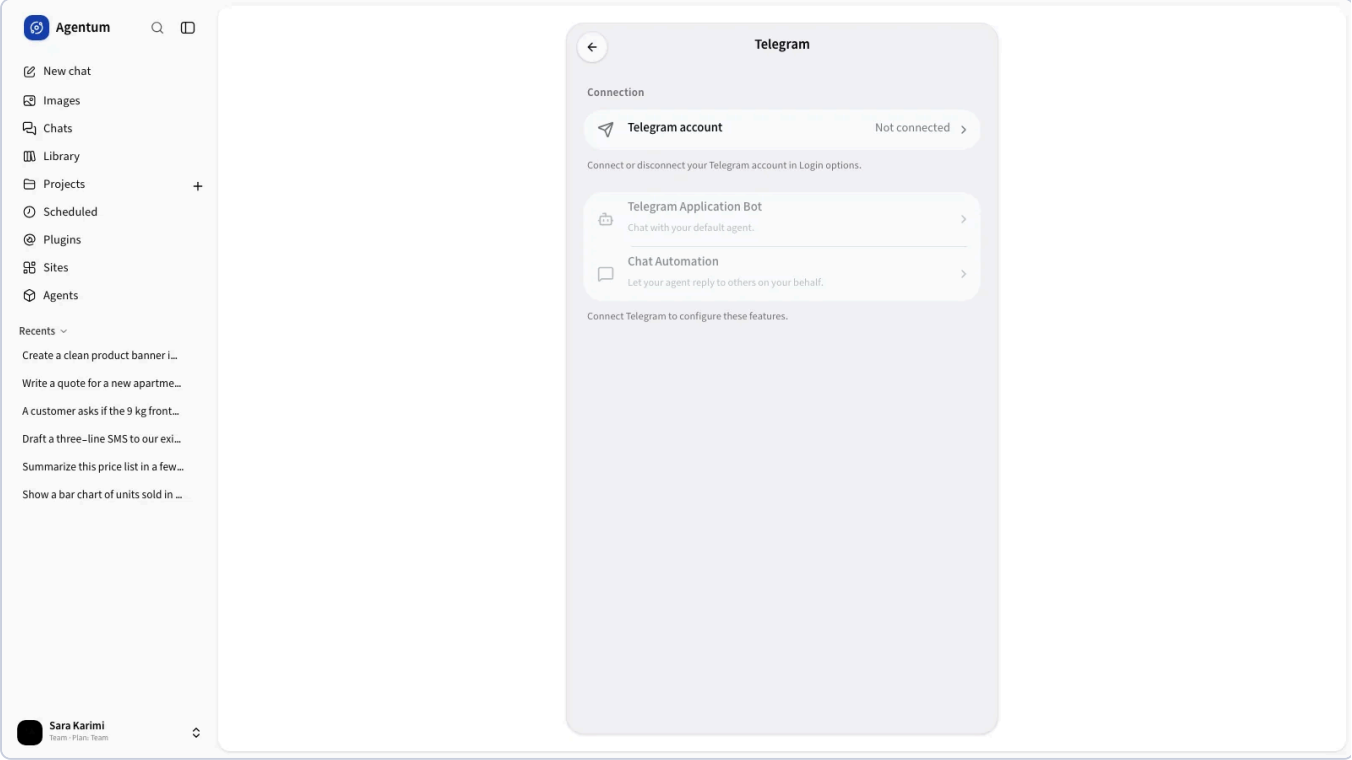
Neda answers customers on Telegram all day, so she wants her agent right there too. See whether your Telegram account is connected and open the two ways your default agent works in Telegram: the official bot, and Chat Automation.

Before you start

Connect Telegram first, in Settings under “Login options”. Until then the two options below stay greyed out.

Steps

1. Open Settings, then “Telegram”. The row on the Settings home says “Connected” when your account is linked.
2. Under “Connection”, the “Telegram account” row shows your Telegram username (or name), or “Not connected”. Select it to open “Login options” and connect or disconnect.
3. When connected, select “Telegram Application Bot” (“Chat with your default agent.”) to open its settings page. There, select Open in Telegram when available.
4. Select “Chat Automation” (“Let your agent reply to others on your behalf.”) to set up automated replies.



The Telegram page with connection and the two options

Expected result

The page shows your connection and opens the bot page or the Chat Automation page. The message “Connect Telegram to configure these features.” shows while you are not connected.

Troubleshooting

Problem	What to do
The two options are greyed out	Connect Telegram in “Login options” first.
“Some settings could not be loaded.”	Select “Retry”. A failed load can look like a disconnected account.
The account shows “Not connected” but you did connect	Reload the page, then open “Login options” to check the link.

Telegram Application Bot

Purpose

Neda wants to ask her agent a quick question from her phone, without opening the web app. Open the official Agentum bot in Telegram and talk to your default agent there.

Before you start

Telegram must be connected in “Login options”. If it is not, this page shows the connection row instead of the bot.

Steps

1. Open Settings, then “Telegram”, then “Telegram Application Bot”.
2. Under “Official bot”, check the bot name and its status: “Ready” or “Unavailable”.
3. When it is ready, select “Open in Telegram”. The bot opens in a new tab or in the Telegram app.
4. Send text, voice messages, photos and files to chat with your default agent. Files sent through Telegram must be non-empty and at most 20 MB. If a file is too large or cannot be retrieved, upload it through the web app instead.

Expected result

You chat with your default agent in Telegram. The bot uses the agent’s existing personalization, models and tools, so there are no separate settings. The official bot uses your default agent in your personal workspace. Change personalization, model and plugin settings there.

Troubleshooting

Problem	What to do
The page shows only a connection row	Connect Telegram in “Login options” first.
The status is “Unavailable”	The bot cannot be opened right now. Try again later.
You want a different tone	Change it in “Personalization” in your personal workspace; the bot follows it.
“Some settings could not be loaded.”	Select “Retry”.

Chat Automation

Purpose

At lunchtime Neda steps away from her desk, and customers’ delivery and warranty questions keep arriving on Telegram. Let your agent reply to other people on your behalf, and set how it behaves.

Before you start

Connect Telegram in “Login options”. In Telegram itself, open Settings, then Chat Automation, connect the official bot and allow it to reply. You can prepare the instructions and tools here first.

Steps

1. Open Settings, then “Telegram”, then “Chat Automation”.
2. Turn “Allow automated replies” on or off. It is saved at once. The text under the switch reports whether the connection permits replies, whether it belongs to another workspace, or whether the setup in Telegram is still missing. “Allow automated replies” must also be on; the guidance alone does not mean automation is enabled.
3. Under “Agent behavior”, select “Instructions” to write how the agent should reply. It shows “Custom” once set and “Not set” before.
4. Select “Plugins & tools” to choose which tools the agent may use for automated replies.

Expected result

When everything is set, the agent replies to others on your behalf using the instructions and tools you chose. These settings apply only to Chat Automation and do not change your own conversations with the agent. Turning the switch off stops automated replies but does not disconnect your account.

Troubleshooting

Problem	What to do
The page shows only a connection row	Connect Telegram in “Login options” first.
“This Telegram automation connection belongs to another workspace. Manage automation from that workspace.”	Switch to that workspace and manage automation there.
It says to open Chat Automation in Telegram	Finish the setup in Telegram: connect the official bot and allow replies.
Messages are not answered	Messages awaiting processing for 24 hours or more are not handled. Ask the sender to send a fresh message.
“Some settings could not be loaded.”	Select “Retry”.
The agent does not reply	Check that “Allow automated replies” is on and the bot is allowed to reply in Telegram.

Chat Automation instructions

Purpose

Neda wants the replies to sound like the shop: short and polite, and never confirming a delivery date on its own. Write how your agent should reply on your behalf in Chat Automation.

Before you start

Telegram must be connected in “Login options”; otherwise the text box is turned off.

Steps

1. Open Settings, then “Telegram”, then “Chat Automation”, then “Instructions”.
2. Write the instructions in the text box, up to 4000 characters. For example: “Reply briefly and politely. Ask me before confirming a price or a delivery date.”
3. Select “Save” at the top. It becomes available only after you change the text.

Expected result

You return to Chat Automation. After saving, “Instructions” shows “Custom” when text remains, or “Not set” when you clear it. To remove the instructions, clear the text box and save. These instructions do not change your own conversations with the agent.

Troubleshooting

Problem	What to do
The text box and “Save” are disabled	Connect Telegram in “Login options”.
“Save” is disabled	The text is unchanged. Edit it first.
“Check your entries and try again.”	The text is too long. Keep it within 4000 characters.
“Could not save settings.”	Keep the page open and save again when the connection is back.

Chat Automation plugins and tools

Purpose

Neda wants the agent to look up an order’s status for customers, and to ask her before it uses any of the shop’s plugins. Choose which plugins and tools your agent may use when it replies for you in Chat Automation.

Before you start

Telegram must be connected, and the plugins must be connected from the Plugins page. Only tools already allowed for your default agent can be used here.

Steps

1. Open Settings, then “Telegram”, then “Chat Automation”, then “Plugins & tools”.
2. Under “Chat Automation plugins”, search with “Search plugins” if needed (search text can contain up to 200 characters), then select a connected plugin. Each row shows how many tools are active.
3. On the plugin page, turn on “Allow [plugin]”.
4. Under “Allowed tools”, tick the tools the agent may use for automated replies. Tools that are disabled for your default agent are greyed out and say “Disabled for your default agent”. Use “Search tools” to find one (also up to 200 characters). More tools load as you scroll.

Expected result

Choices are saved at once. Automated replies can use only the ticked tools. Every plugin tool call requires your approval, whatever you chose under “Tool approval” in Settings, “Plugins”, because a plugin’s tools are never treated as read-only. “Always ask” also asks before Agentum’s own read-only tools. An automated reply waits up to 2 minutes for your approval in the web app, then goes on without that tool.

Troubleshooting

Problem	What to do
“No connected plugins”	Connect plugins from the Plugins page first.
A tool is greyed out	Check, in this order: that the plugin is connected, that the list has finished loading, that “Allow [plugin]” is on here, and then that the tool is allowed for your default agent in Settings, “Plugins”.
“No matching tools”	Change or clear the search text.
“No tools available”	The plugin offers no tools right now.
“Some settings could not be loaded.”	Select “Retry”.
“Plugin not connected”	Connect the plugin from the Plugins page.
The page shows only a connection row	Connect Telegram in “Login options”.

Privacy, help and support

Sara Karimi · Owner and manager of Nilgoon

Sara closes the shop at eight, but her mind stays at work. Reza and Neda have typed customer questions into Agentum all week, and she wonders what happens to those conversations and where to turn when something looks wrong.

She opens Settings and goes through the privacy pages. She finds the two data switches and learns what they save today, sees how to download a file or copy an answer, and checks what the Help center and the report form offer. She notes the version on the About page to quote when she asks for help.

In this chapter you will learn about “Data controls”, “Your data: what you can save, and what you cannot do yet”, “Help center”, “Report an issue” and “About”.

Data controls

Purpose

Sara wants to know what happens to the shop’s conversations. This page has two switches, one for keeping chat history and one for allowing data to improve models; for now they save your preferences but do not change retention or enforce consent.

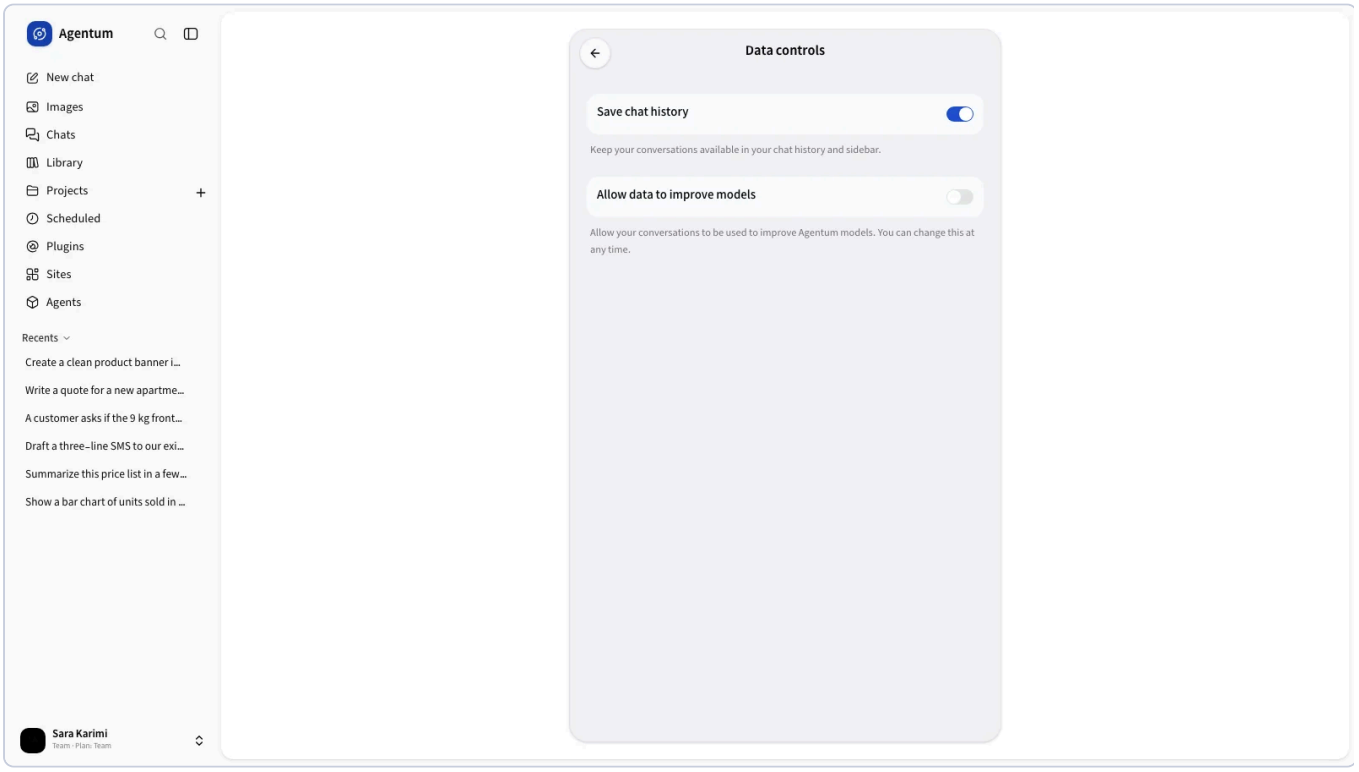
Before you start

Sign in and select your workspace. This setting is saved for your seat in the current workspace.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard).
2. Under App settings, select Data controls.
3. Switch Save chat history on or off. Its description reads “Keep your conversations available in your chat history and sidebar.”
4. Switch Allow data to improve models on or off. Its description reads “Allow your conversations to be used to improve Agentum models. You can change this at any time.”

These switches save preferences but do not currently change chat retention or enforce model-improvement consent.



The Data controls page.

Expected result

Each switch saves as soon as you flip it; there is no Save button. You can change either choice again at any time. The separate Allow memory switch is on the Memory page.

Troubleshooting

Problem	What to do
A change does not stick	A dialog titled Error explains why saving failed. Select Close, check your connection and try again. Reopen the page to see the saved value.

Your data: what you can save, and what you cannot do yet

Purpose

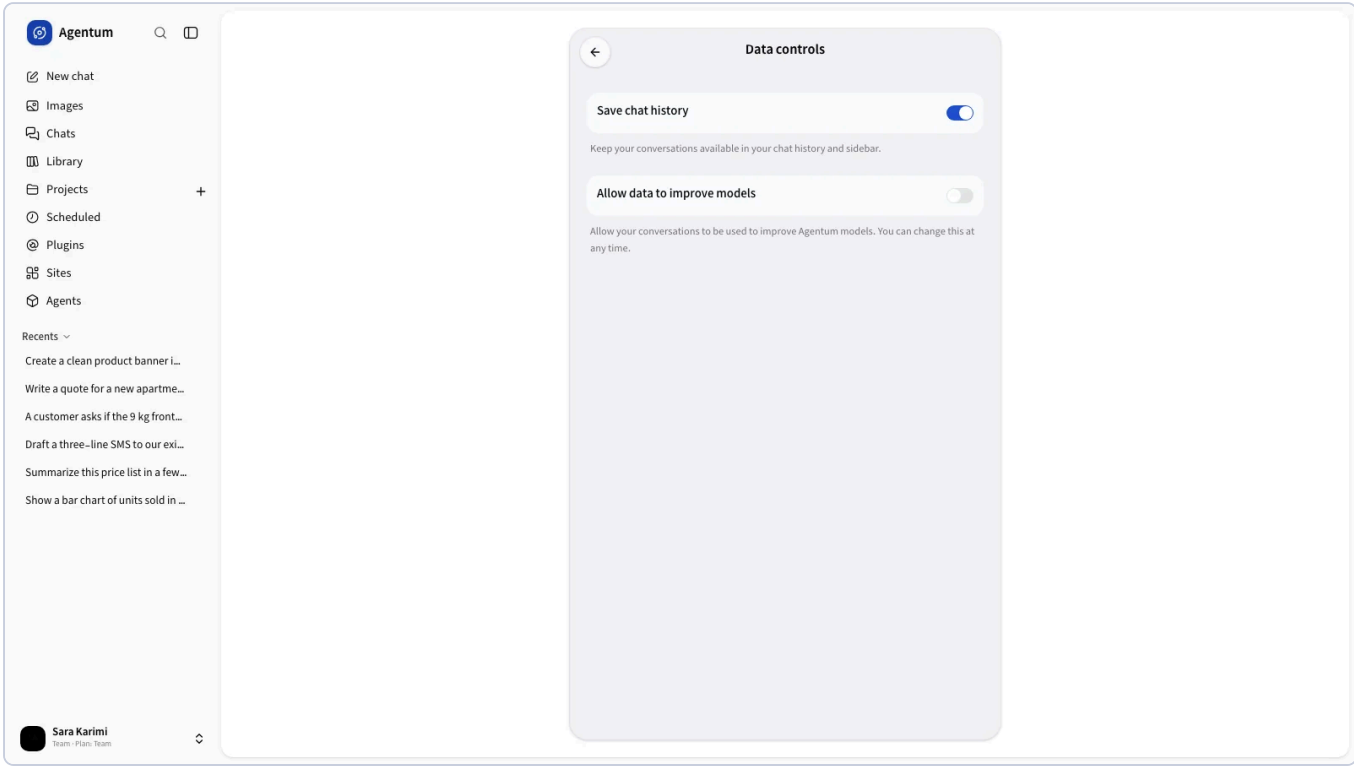
Sara wants to keep a copy of what the shop has put into Agentum. This article lists the ways to keep your data today, and what is not available yet.

Before you start

Sign in and select the workspace you want to look at.

Steps

1. Open **Settings**, then **Data controls** (under **App settings**). Two preference switches are there, **Save chat history** and **Allow data to improve models**. They save preferences but do not currently change chat retention or enforce model-improvement consent. **Allow memory** is in **Settings**, **Memory**, with the same limitation.
2. To keep a file, open **Library**, choose the file's options and select **Download**. Files in a chat can be downloaded with **Download file** in the chat.
3. To keep an answer's text, select **Copy response** under the answer.
4. To see how much space your files use, open **Settings**, then **Storage**. From there **Open Library** and **Sites** take you to the places where files are managed.
5. To remove a conversation, open its options and choose **Delete chat**, then confirm (or select **Cancel** to keep it). This deletes the chat and its saved short-term memory for good. A conversation that belongs to a site cannot be deleted this way: remove its site from **Sites** instead.
6. To end other logins of your account, open **Settings**, then **Active Sessions**.



The Data controls page in Settings

Expected result

You can save individual files and copied text, and delete single conversations. A full-account export and account deletion are not available in the app.

Troubleshooting

Problem	What to do
I need a full export or to delete my account	A full-account export and account deletion are not available in the app. The **Report issue** page in Settings cannot submit such requests either.
I turned off **Save chat history**	This switch only saves a preference today. It does not change how long chats are kept and does not delete conversations you already have.
A download only gave me one file	A download is only that file. It is not an export of everything in your workspace.

Help center

Purpose

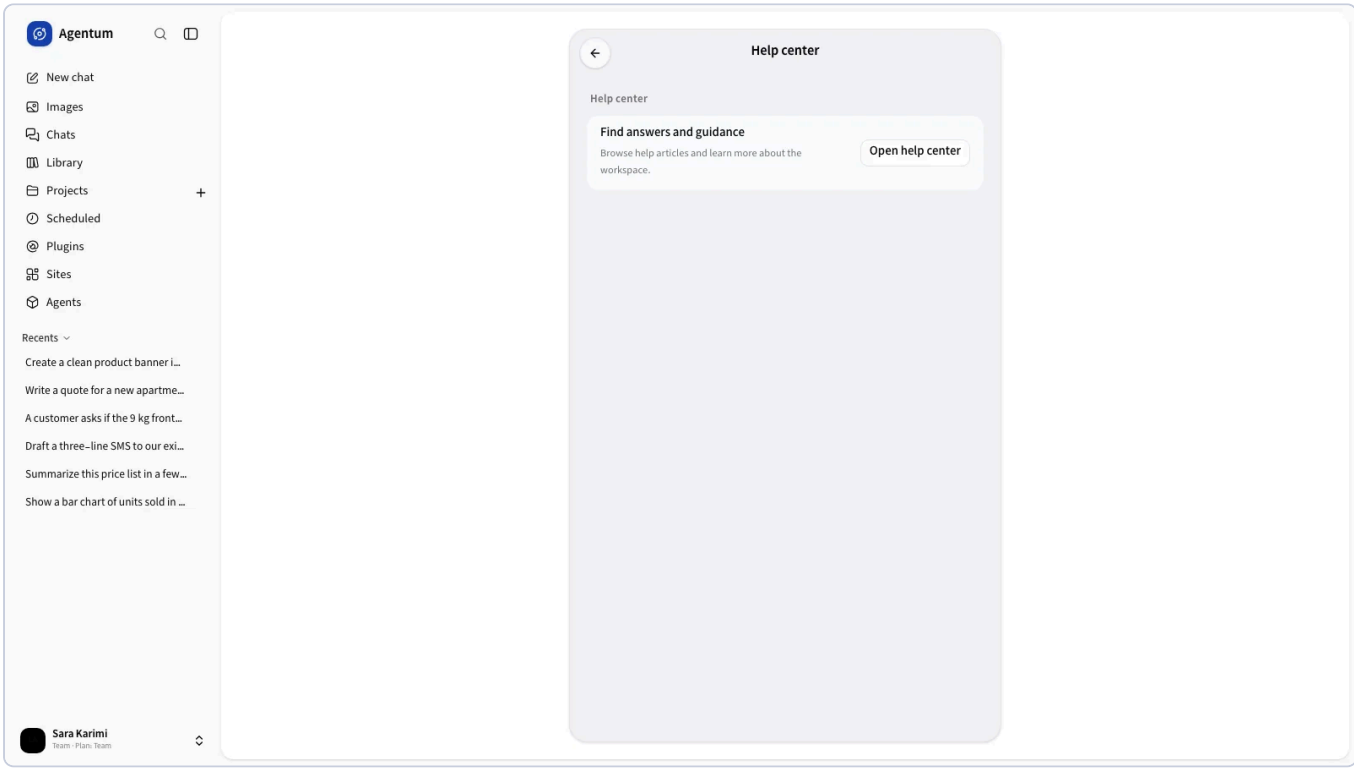
Sara runs into a setting she has never used and wonders where to look first. The Help center page in Settings shows a guidance card, “Find answers and guidance”, with an Open help center button that takes you to the help articles.

Before you start

Sign in and select your workspace to open Settings. You do not need any permission.

Steps

1. Open the account menu in the sidebar and choose Help. You can also open Settings and, under Get help, select Help center.
2. Read the card “Find answers and guidance”: “Browse help articles and learn more about the workspace.”



The Help center page.

Expected result

The Help center page displays its guidance card and the Open help center button.

Troubleshooting

Problem	What to do
Open help center does not open anything	The Help center button does not currently open help articles. Use this manual.

Report an issue

Purpose

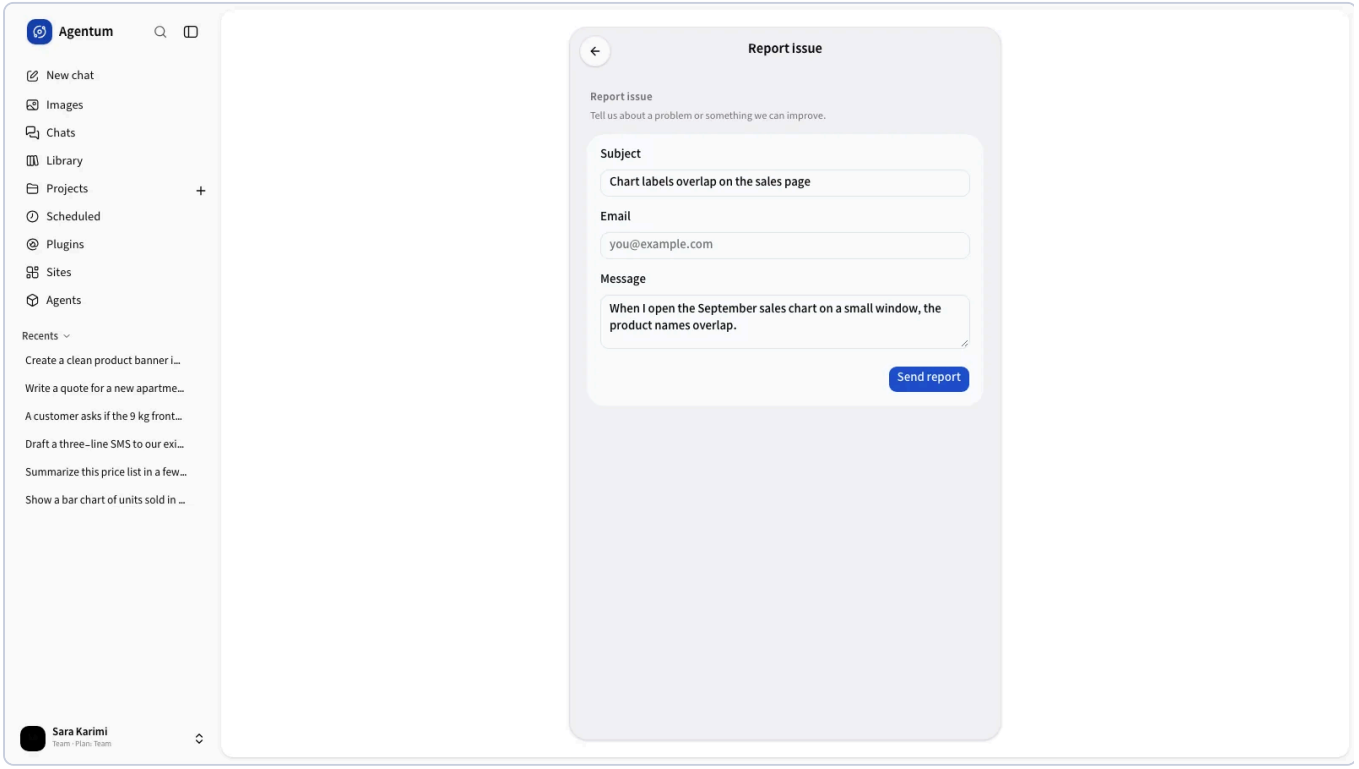
Late one evening something in Agentum behaves oddly, and Sara wants to tell someone. The Report issue page has a form that takes a subject, your email and a message; for now “Send report” only checks that they are filled in correctly.

Before you start

Sign in and open Settings. Do not put passwords or other secrets in the text.

Steps

1. Open Settings, then “Report issue”.
2. Fill in “Subject” (“What went wrong?”), “Email” (it starts with your account email when there is one) and “Message” (describe the issue and what you expected to happen).
3. “Send report” only checks that all three fields are filled in and that the email looks valid.



The report issue form

Expected result

This form does not send or save reports. Contact your workspace administrator through your usual support channel.

Troubleshooting

Problem	What to do
The browser asks you to fill in a field	All three fields are required.
The email is rejected	Enter a full address such as name@example.com.
You need an answer quickly	Consult this manual or contact your workspace administrator through your usual support channel.

About

Purpose

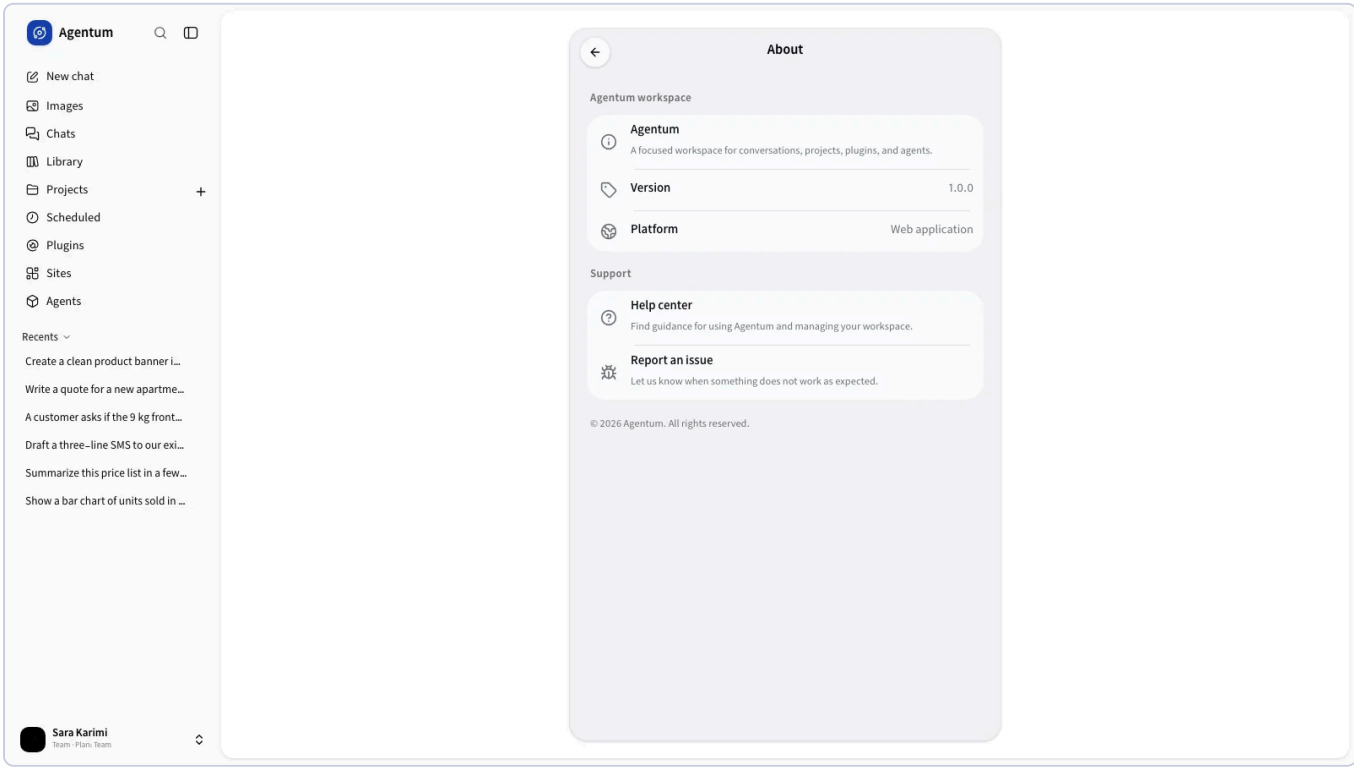
Sara needs the version number when she asks for help. The About page shows the product information, version and platform.

Before you start

Sign in and select your workspace to open Settings.

Steps

1. Open the account menu in the sidebar and choose Settings (or use the Open settings shortcut listed under Keyboard).
2. Under Get help, select About.
3. Read the Agentum workspace card: the product summary, the Version and the Platform (Web application).
4. Read the Support section, which names Help center and Report an issue. These rows are text, not links.
5. At the bottom, read the copyright line.



The About page.

Expected result

The page shows information only. It does not change a setting or send anything.

Troubleshooting

Problem	What to do
The Help center or Report an issue row on About does nothing when selected	These rows are descriptions, not links. Consult this manual for guidance.

Glossary

Term	Meaning
Agent	An AI assistant with its own instructions, model, skills and tools. Agentum has built-in agents, and you can create your own.
Chat	A conversation with an agent. Chats are saved so you can return to them.
Workspace	A personal space, or a shared space for a team or organization, with its own members, data, settings and plan. You can belong to more than one workspace.
Member	A person who belongs to a workspace. Each member has a role.
Role	A named set of permissions that decides what a member can see and change in a workspace.
Group	A set of members you manage together, for example the sales staff of a shop.
Project	A folder for related chats and files, with its own instructions.
Library	The place where your uploaded and generated files are kept.
Plugin	A connection to another service, such as an online store or a messaging app, that gives agents new tools.
Tool	An action an agent can perform, such as creating a chart or reading orders. Some tools are built into Agentum; others come from connected plugins.
Skill	A packaged set of instructions and files that teaches an agent how to do a specific kind of work.
Model	The AI system used for a task, such as writing answers, generating images or processing speech. Models differ in capabilities, speed, cost and quality.
Work mode	A chat mode for longer, multi-step tasks in which the agent plans and uses tools on its own.

Term	Meaning
Scheduled task	A prompt that an agent runs automatically on a schedule, for example a weekly sales summary every Saturday morning.
Site	A web page or small website that an agent builds for you in Agentum.
Plan	Your subscription level. It sets usage limits and which features you can use.
Knowledge base	A collection of your documents, web pages and recordings that agents search when they answer, citing them as numbered sources.
Page	A document you write in the Documents section, with an AI assistant beside it.