



Umbraco AI Toolkit

Configuration & operating guide

A plain-English guide to the minimum settings, where they go, the content flow, search, chat, enquiries and guidance rules.

For Umbraco 17.6.2+

Package version: 1.0.2

Prepared for production setup

Use this alongside the Umbraco backoffice. The examples use Azure App Service environment-variable naming, but the same keys can be placed in appsettings.json for local development.

1. Before you start

The toolkit is an Umbraco package that connects your website content to Azure AI Search and Azure OpenAI. Before installing it, have these resources ready:

- An Umbraco 17.6.2 or later website running on HTTPS.
- An Azure AI Search service, with an index name reserved for the site.
- An Azure OpenAI resource and a deployed chat-capable model.
- An Azure Storage account. The package uses a blob container for indexed text and Azure Tables for conversation/enquiry records.
- An SMTP provider if you want enquiry notifications emailed from the site.
- A valid toolkit licence or trial key for the production hostname.

Recommended approach

Put secrets in Azure App Service Configuration rather than committing them to appsettings.json. Use the double-underscore form shown below; ASP.NET Core maps it to nested configuration sections.

2. Install the package

From the folder containing your Umbraco website project:

```
dotnet add .\YourSite.csproj package Umbraco.AI.Toolkit --version 1.0.2
```

Then build and run the site once. The package adds the AI Toolkit sections to the backoffice and registers the search, chat, enquiry and indexing services.

3. Minimum production configuration

Add these settings in Azure App Service → Environment variables → App settings. Restart the App Service after changing them. Values below are examples of the setting names only; use your own endpoints, keys and names.

Setting	What it is / where it goes
UmbracoAi__Engine__Search__Endpoint	Azure AI Search endpoint, for example https://your-search.search.windows.net
UmbracoAi__Engine__Search__IndexName	The Azure AI Search index used by this site.
UmbracoAi__Engine__Search__Key	An Azure AI Search admin/query key with the permissions needed by the package.
UmbracoAi__Engine__Model__Endpoint	Azure OpenAI endpoint, for example https://your-openai.openai.azure.com
UmbracoAi__Engine__Model__Deployment	The deployed model name, not necessarily the underlying model family name.
UmbracoAi__Engine__Model__Key	Azure OpenAI API key.
UmbracoAi__LlmStorage__ConnectionString	Azure Storage connection string used for extracted/indexable text.
UmbracoAi__LlmStorage__ContainerName	Blob container name for the site's AI content, for example umbraco-ai-content.
UmbracoAi__Engine__Conversations__ConversationTableName	Azure Table name for chat conversations/transcripts.
UmbracoAi__Engine__Conversations__EnquiriesTableName	Azure Table name for submitted enquiries.
UmbracoAi__Licence__Key	Your production licence/trial key, if required by the installed package build.

Optional email settings

Only add these when you want the toolkit to send enquiry notifications or transcript emails through SMTP:

Setting	Purpose
UmbracoAi__Engine__Email__Enabled	true/false switch
UmbracoAi__Engine__Email__Host	SMTP host
UmbracoAi__Engine__Email__Port	SMTP port, commonly 587
UmbracoAi__Engine__Email__EnableSsl	Whether the SMTP connection uses TLS
UmbracoAi__Engine__Email__FromAddress	From address used by the site
UmbracoAi__Engine__Email__Username	SMTP username, if required
UmbracoAi__Engine__Email__Password	SMTP password, stored as a secret

4. Backoffice setup

Once the app has restarted, open the Umbraco backoffice and work through these areas:

Area	What to do
App Settings	Confirm the package can read its configuration and that the core services are enabled.
AI on Site	Set site-level defaults and decide which AI features are available on the front end.
DocType Config	Choose which published document types and fields are included in the AI content source.
UI Labelling	Set visible labels, placeholders and button text for search, chat and enquiry experiences.
Guidance Rules	Create rules that shape how the AI responds and when an interaction should become an enquiry.
AI Search Test	Run a known query and check that relevant pages are returned.
AI Chat Test	Ask a question grounded in your content and check the answer, citations and escalation behaviour.

Add the front-end components where you want them rendered:

```
<ai-search culture="en"></ai-search>
<ai-chat-widget culture="en"></ai-chat-widget>
<ai-chat-widget inline culture="en"></ai-chat-widget>
```

Use the inline form when chat belongs in the body of a page. Use the widget form when it should be available site-wide.

5. How it works

The toolkit has two related flows: a content/indexing flow that prepares your Umbraco content, and a visitor flow that answers questions or captures an enquiry.

Stage	What happens
Publish	A page is published or changed in Umbraco.
Extract	The configured document types and fields are turned into clean text for AI use.
Store	The extracted content is stored in the configured Azure Storage container.
Index	Content is chunked and sent to the configured Azure AI Search index so relevant passages can be retrieved.
Search / chat	A visitor's question is matched to relevant content. Azure OpenAI uses the retrieved context to form the response.
Unpublish / remove	When content is removed or no longer included by the configuration, the corresponding AI content should be removed from the searchable source during the package's indexing lifecycle.

This release uses Azure AI Search retrieval plus Azure OpenAI generation. It does not require you to create or manage vector embeddings as a separate setup step.

6. Guidance rules

Guidance rules are the operational layer between the retrieved content and the visitor experience. They tell the toolkit how to handle a topic, what the AI should emphasise, and when a conversation should be turned into an enquiry. Keep rules specific and test them with realistic questions.

Field	How to use it
Rule name	A short internal name, such as Service enquiry.
Subject description	Plain-English description of the topic the rule covers.
Matching keywords	Terms, phrases or signals that should activate the rule.
Excluded keywords	Terms that look similar but should not activate this rule.
AI guidance	The instruction the assistant should follow when this topic is detected. State the desired tone, limits and next action.
Priority	Use a higher priority when a specialised rule must win over a broad rule.
Do not send enquiry	Use when the assistant should answer but must not create an enquiry for this topic.
Destinations	Where the resulting enquiry or notification should be routed.
Telephone / summary	Whether the flow should request a phone number or produce a concise summary for handoff.
Additional fields	Extra information to collect, such as organisation, matter type or preferred callback time.
Approved pages	The pages or content context where the rule is allowed to apply, when you want to narrow its scope.

Example rule

Property	Example
Rule name	Service enquiry
Matching keywords	service, help, support, need advice, speak to someone
Excluded keywords	careers, complaint about this website, invoice copy
AI guidance	Answer from approved site content. Do not invent service details. If the visitor is asking for help with a specific matter, explain the next step and offer an enquiry. Ask only for the minimum information needed.
Priority	10
Do not send enquiry	No

7. Enquiries and transcripts

A normal search is answered from the indexed content. A chat can remain a conversation, or it can become an enquiry when a guidance rule, user action or escalation condition says it should.

- The conversation/transcript is recorded in the configured Azure Table.
- An enquiry is recorded separately in the configured enquiries table.
- If email is enabled, the configured SMTP service sends the notification to the chosen destination.
- The guidance rule should define what to collect, what to summarise, and where to route it.
- Test both the successful answer path and the handoff path before launch.

8. Launch checklist

Check	Done
Package installed and site builds successfully	☐
All required App Service settings added	☐
Storage container and table names confirmed	☐
Search index exists and can be queried	☐
Azure OpenAI deployment name confirmed	☐
At least one document type and field configured	☐
Content indexed and test search returns expected pages	☐
Chat answer checked for accuracy and citations	☐
Guidance rules tested with matching and excluded phrases	☐
Enquiry table and email notification tested	☐
Licence/trial key and production hostname confirmed	☐
Privacy, terms and AI disclosure links visible	☐
Cloudflare routing/proxy and cache behaviour tested	☐
Backups, monitoring and support contact documented	☐

Support note: keep a copy of the exact production configuration, the index name, the model deployment name and the active guidance rules. Those four items make troubleshooting much faster.