SECTION TWO: NAVIGATING THE PORTALIS PORTAL

[Companion Video: Avatar 101 Choosing: Character, Voice, LLM](#)

Dashboard Overview

Once you log into the Portalis portal, you will be greeted with an intuitive and User-friendly dashboard. Here's a detailed walkthrough of the key sections and functionalities to help you get started.

Avatar Carousels

1. My Avatars.
- This section will initially be empty, since you haven't created any Avatars yet.
- Instead, there is simple a button (in the shape of an Avatar Card) that says "Create New Avatar"
- Use this button when you are ready to create your first Avatar! (See below "Creating a New Avatar"

2. Call Back
- Once you have called an Avatar, the next Carousel on the list will be a "Call Back" section, which displays the last few Avatars that you engaged/called, allowing you an easy way to reconnect with those Avatars.

3. Featured Avatars
- The final Carousel, at the bottom of the Lobby, shows "Featured" Avatars, which are examples created by Portalis to show you different personalities and behaviors that our editor is capable of supporting.

Creating a New Avatar

1. Click the "Create a New Avatar" button from the "My Avatars" Carousel
2. Pick and Example Avatar (or "Avatar Template") to Use:

- It is easier to start with a functional Avatar and modify it. Two Avatar Cards will be presented for you to use as a starting point: "Alan the Alien" and "Elena". For this example, we will select "Elena". Clicking this Avatar Card will create a new Avatar for you to edit, and open the Avatar Editor automatically.

3. Avatar Editor
   - Selecting an Avatar template brings you to the Avatar editor area, which is the core section for customizing your Avatar.

Avatar Editor Overview

1. Summary Section:
   - At the top of the editor, you will find a summary section where you can customize the basic details of your Avatar:
   - Title: Enter a name for your Avatar. This can be anything you choose to identify your Avatar, such as "Elena" This won't impact your Avatar but will make identifying it from the Lobby easier for you and others in your organization.
   - Description: Provide a brief description of your Avatar's role or job. For example, you could write, "A helpful customer service agent" or "A friendly assistant ready to answer your questions". This also won't impact your Avatar directly, but will make it easier for you and others in your organization to understand the nature of your Avatar without having to read through the prompt and related files.

2. Character Creator:
   - On the left side of the editor, click on "Character Creator" under the summary section.
   - Character Selection: Pick from a range of pre-selected characters. Choose one that best represents your brand or the role you want the Avatar to play.
   - Environment Selection: Select an environment that complements your character. This helps in setting the right context for interactions. This will be the background image that your Avatar will stand in front of. Note: the environment that your selected avatar is in front of when you choose that Avatar is the default and is the ideal environment for that Avatar. Not all environments will "size" correctly for all avatars.
   - Voice Selection: Choose from a variety of pre-loaded voices, available in both male and female options, including several different accents. For more on multilingual voice selection see the section on [Multilingual Support: Spanish Deployment](#)
   - If you require custom Avatar work or voice selections that are not listed, contact the Portalis team for further assistance. The options are truly unlimited!

3. Prompt Editor:
   - Below the Character Creator on the left sidebar, you will find the "Prompt Editor". This is essentially the brain of the Avatar, allowing you to define how your Avatar interacts with Users. The Prompt Editor includes two areas: AI Settings and Chat Settings.

   - AI Settings

Interface: At the top of the Prompt Editor, you will see an interface listing all available Large Language Models (LLMs). Click on the open white box to view and select from the available LLMs.

   - LLM Selection: Portalis offers a variety of LLMs and is agnostic to whatever LLM you prefer or choose, we regularly update all of the latest models. Each LLM has unique qualities, for example: OpenAI's ChatGPT is known for concise responses while Anthropic's Claude Sonnet provides more emotional and verbose responses. In general, there is a trade off between speed and intelligence and LLM space is changing rapidly. New models are released every week. Sign up for our newsletter to keep up to date on the latest and greatest.

   - Default settings will be checked to maintain standard configurations. We strongly recommend that you don't change the default settings unless you are an advanced User.

   - AI Settings: Configure the basic AI settings, such as choosing whether the Avatar should remember conversations.

  - Chat Settings:

   - Remember Conversations: Enable or disable the memory feature for ongoing interactions if you prefer. If you want every use of the Avatar to be a new conversation, keep the memory box unchecked. If you are building an Avatar that needs to remember past conversations, i.e. save the state between sessions (like what part of the decision tree or stage/phase the User was in), then you'll need to check the box for memory. Most business interactions will NOT need this.

   - Gender Selection: If you prefer, choose a gender for your Avatar.

   - Name and Greeting: Customize the Avatar's given name and the greeting message it will deliver upon initiating a conversation. For example, "Hi, I'm Elena. How can I help you with your business questions today?" or "Hi, I'm Elena. What information can I give you on our services today?" This greeting aligns best with the function of the Avatar. As noted above, the greeting will be repeated verbatim everytime the Avatar restarts -- unless memory is turned on and the User is returning. The Avatar's Name will be stored automatically in the variable {{MIL_AI_NAME}} which you can use in the Greeting or in the related prompt and files.

4. Prompt Configuration

   - Within the Prompt Editor, you will find preloaded prompts designed to facilitate uplifting conversations between the User and the AI. These prompts can be customized to fit the specific role of the Avatar.

   - Backstory and Role: Define the backstory and specific role of your Avatar. This includes the Avatar's personality, background, and the functions you want it to perform. We think of this as a good place to give the Avatar a "job description." You can be as detailed as you wish. Equally important is specifying guardrails and controls –what you do not want the Avatar to do or what not to talk about. We will cover more specifics on Avatar Design in the subsequent sections.

   - Animation Tags: Located within the prompt file, an animation tags command and code have been preloaded to give the Avatar the ability to express emotions and actions, making

interactions more human-like. Keep these tags in place to ensure a dynamic conversational experience.

Testing and Publishing

1. Testing Your Avatar:
- On the right side of the navigation panel, you will see a green call button. This allows you to interact with and test your Avatar before publishing it. You can see how the Avatar responds to various prompts based on the settings and configurations you have applied. You can change anything in the prompt and test again if you wish.
 - To stop the call, click the red circle with the "X."
- When you test call your Avatar, the screen in the Avatar Editor will automatically jump to the Debug window. This window shows a running snapshot of everything in your Avatar's brain at that moment. This includes dialogue, variables, data that is being pulled from any files you have, etc. It's a great tool to use to iterate and enhance your Avatar in real time.
- We cover much more about the Debug window in Section Four of this User Guide under Viewing and Debugging the SEM File.

2. Publishing Your Avatar:
 - Once you are satisfied with your Avatar's configuration and performance, you can publish it by clicking the publish button located on the upper left-hand side of the editor.
 - Publish Process: Clicking the publish button will prompt a pop-up window asking if you want to replace the working copy with the published copy. Confirm by clicking "Publish".
 - Working Copy and Published Copy: There will always be a working copy available above and a published copy below on the left hand side of your Avatar Editor screen. The Working Copy allows you to continue refining your Avatar without affecting the live version on your website until you are ready to publish the changes.
 - NOTE: If there are new changes in the Working copy that have not yet been published then the Avatar thumbnail and editor will have yellow text indicating "unpublished changes" until you do so.

Saving and Exporting Avatar Data

1. Saving Avatar Personality:
 - If you want to save the Avatar's personality configuration as a file for future use, you can do so easily. On the left side of the panel, locate the section labeled `Avatar.yaml`.
 - Click on the download button to the right. This action will download the current Avatar's personality settings, allowing you to re-upload it later if you wish to revert to an older version. This will only download the Avatar.yaml file which contains the base prompt you have created and the AI Engine setting data. NONE of the files will be saved with this action. You can also Export the Entire Avatar with the Export button. This will create a zipped file

package and save it to your local device. With the full Export (vs the Download), all of the relevant files will be saved.

2. Downloading Conversation Log:
   - While having a conversation with the Avatar before you hang up, you might want to immediately save the conversation for record-keeping or analysis.
   - Use the chat log panel (click the "Log" button at the bottom of the Avatar to toggle between the visual Avatar and the text-like chat log system).
   - To download the conversation, click the "Log" button *before* your call ends, and look up to the top right area of the "Log" panel where you will see a download box that says "download" when you hover over it. Click on this to download and save the conversation file before you hang up with the Avatar.
   - We cover these items and process more extensively in [Section Five: Downloading Your Avatar File and Chat Log Sessions](#).