



DATASHEET · AGENTS · CHAT AGENT

Opening five folders for one answer? Ask once. The answer comes with its source.

The Chat Agent answers questions about your documents and knowledge bases, shows the sources and handles the next step right away: a note, a tag, a move or a delivery. For everyone who works in PaperOffice every day, at the desk and on the go.

AT A GLANCE

One question by text or voice, one answer with the documents behind it and the next steps right below. In the web app, in the mobile app and via MCP.

01 · WHAT IT IS ABOUT

Knowledge sits in folders. The agent gets it out.

Anyone looking for a deadline, an amount or a contract clause opens one workspace after another and skims. The Chat Agent searches the workspaces you may see, reads the matching documents itself and answers with sources. Then, when you ask, it handles the next step.

INPUT

Text or voice, plus up to 3 PDFs or images per message

SCOPE

All or selected workspaces, a folder, selected documents, knowledge bases

RESULT

Answer with sources, followed by next steps such as sending by email or sharing

ACCESS

Web app with Alt+A, mobile app and MCP server

**Answers with sources**

Below the answer, you see the documents found; the sources panel shows the hits of this answer. One click opens the document.

Workspaces and knowledge

The agent searches your workspaces and reads the matching documents itself. Pinned knowledge bases and files in the chat count too.

Get things done directly

Notes, tags, comments, moving, copying and renaming: the agent does them directly when you ask.

Deleting only after your yes

The agent deletes or revokes only after you explicitly agree in your next message. Until then, everything stays as it is.

Choose your agent

Default for daily work, core agents by industry or your own agents with instructions and knowledge bases. One agent applies to the whole chat.

Same rights as in the app

The agent works with your login and sees the workspaces you may see. Protected workspaces stay locked until you unlock them.

02 · HOW IT WORKS

Ask, check, get it done.

The chat sits next to your documents. You open it with one click, decide where it searches and check every answer against the documents it comes from.

1

Open the agent

Click **Ask Agent** at the top of the app or press **Alt+A**. For selected documents, **Actions › Ask Agent** opens the chat with exactly that selection.

2

Choose the scope

In **Agent context**, you decide where the agent searches: all workspaces, selected workspaces or the current folder.

3

Ask

By text or by holding the microphone button. You drag PDFs and images straight into the chat.

4

Check and act

The **Sources** panel shows the documents behind the answer. Then ask the agent, for example, to set a tag.

TECHNICAL DATA

FEATURE	DETAILS
Input	Text, voice; PDF, PNG, JPG, WEBP up to 10 MB, up to 3 files per message
Agent context	All workspaces, selected workspaces, current document, folder, selected documents
Response mode	Agent Basic, Agent Premium, Agent Ultra
Done directly	Notes, tags, comments, fields, moving, copying, renaming
With your consent	Deleting, revoking, releasing a legal hold, starting AI-DMS processing
History	Chats listed for 30 days, pin, rename, search by title
Access	Web app (Alt+A), mobile app (Agent Chat), MCP tool po_agents_ask

03 · IN PRACTICE

Where the Chat Agent saves time.

Find and flag a contract deadline

Question: "When does the maintenance contract with Nordlicht end?" The agent states term and notice period with the contract as source and, when asked, sets the tag "Check termination".

Compare selected invoices

Select three invoices in the list and choose **Actions › Ask Agent**. Asked "What makes the amounts differ?", the agent reads all three and answers with the documents as sources.

On the go in the mobile app

In **Agent Chat**, take a photo of a delivery note and ask whether the matching order is in the workspace. You can also speak the question and have the answer read aloud.

FREQUENTLY ASKED QUESTIONS

Where do the answers come from?

From the documents in your workspaces, from pinned knowledge bases and from files in the chat. The search covers what AI-DMS has processed; the scope selector shows how much of it is searchable.

Does the agent see all documents in the account?

It works with your login and sees the workspaces you may see. Workspaces protected by password or SMS stay locked until you unlock them.

What does the agent do without asking back?

Reversible actions such as notes, tags, comments, moving, copying and renaming. It deletes or revokes only after you explicitly agree in your next message.

How long are chats kept?

The history shows your chats for 30 days. You can pin them, rename them and search them by title. To use a different agent, you start a new chat.

GET STARTED

Ask the agent your first question.

Create an account, upload documents to a workspace and open the agent with Alt+A. The answer shows which documents it comes from.

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