



DATASHEET · CAPTURE · BUSINESS DATA FOR AI AGENTS

Every order question lands on your team?

Your agent looks up the order.

Operational sources mirror orders, shipments, invoices and prices from your ERP, shop or accounting system. The conversation agent on the phone and in website chat gives the status from them, and order data only after the customer has proven who they are.

AT A GLANCE

Seven kinds of records, recipes for JTL-Wawi and Holded, plus push, pull and JSON. A proof is valid for 15 minutes, for exactly that transaction.

01 · WHAT IT IS ABOUT

Where is my order? The answer is in the order.

No knowledge article can answer questions about delivery status, an invoice or a price. Until now, someone checks the system and calls back. Operational sources make the order available to your agent, protected by a proof, and your system stays untouched.

RECORDS

Orders, shipments, supplier orders, prices, quotes, invoices, returns

CONNECTIONS

Recipes for JTL-Wawi and Holded, push, pull REST, JSON file, JSON records, price list

PROOF

Order number and postal code, SMS one-time code or caller number on the phone

READERS

Conversation agent on the phone and in website chat

**Records, not articles**

Each record has a collection, a key and a status. It is mirrored and looked up by its key, kept apart from the knowledge index.

Proof before information

Order number and postal code, an SMS code to the number on the record or the caller number. A proof is valid for 15 minutes for exactly that transaction.

Recipes for JTL-Wawi and Holded

The mapping is built in; you add access and one reference for the preview. JTL-Wawi works as JTL Cloud or on premises.

Universal interface

Push to a secret ingest URL, pull from an HTTPS JSON API, a JSON file or JSON records. You map fields with JSON dot paths.

Prices from your price list

Prices by SKU or description, with discount or markup, your own price wording and search terms. Importing from a PDF in the DMS shows a preview first.

Quotes and follow-ups

The agent creates PDF quotes with their own number range, files them in a workspace and emails them on request. Special requests reach your team as a ticket.

02 · HOW IT WORKS

Connect, map, set the proof.

You create an operational source in the web app. The preview shows how your data arrives before you save, and the **Proof** tab sets how customers prove who they are.

1

Add a source

Under **Knowledge Base AI > Operational sources**, use **Add source** to set a name and pick the **Connection**: recipe, push, pull, JSON or price list. Credentials are stored encrypted.

2

Map fields and preview

On the **Mapping** tab, set JSON paths for key, status and lookup fields. **Preview without saving** shows up to 20 records.

3

Set the proof

On the **Proof** tab, choose at least one method: order and postal code, SMS code or caller number.

4

Keep data current

Pull sources and recipes sync on their interval, and **Sync now** starts a run. Push systems send to the **Ingest URL**.

TECHNICAL DATA

FEATURE	DETAILS
Collections	orders, shipments, supplier_orders, price_items, quotes, invoices, rma
Sync	Interval from 15 minutes to 7 days, default 180 minutes; push on arrival
Volume	Up to 500 records per run; push up to 60 calls in 10 minutes per source
SMS proof	6-digit one-time code, valid for 10 minutes
Pull authentication	Bearer token, API key or custom header, stored encrypted
Targets	Public HTTPS addresses on port 443; internal hosts and HTTP stay blocked
Access and billing	Web app under Knowledge Base AI > Operational sources , records via the Ingest URL ; billed by usage

03 · IN PRACTICE

Where business data saves the callback.

Delivery status in website chat

An online retailer connects JTL-Wawi. When a customer asks about their order in website chat, they give order number and postal code, and the agent tells them the status from the mirror.

Invoice questions on the phone

A service company works with Holded. On the phone, after the proof, the conversation agent says whether an invoice is open or paid, without anyone in the office having to look it up.

Prices and quotes

A wholesaler keeps its price list with discount and price wording. The agent quotes prices by item number, creates a PDF quote on request and sends special sizes to sales as a ticket.

FREQUENTLY ASKED QUESTIONS

What are operational sources?

That is the name of the feature in the web app under Knowledge Base AI. It mirrors business data as records that the conversation agent on the phone and in website chat answers from, order data only after a proof.

Which systems can I connect?

There are ready-made recipes for JTL-Wawi and Holded. Other systems connect by push to an ingest URL, by pull from an HTTPS JSON API, as a JSON file over HTTPS or as JSON records.

Does PaperOffice write back to my system?

No. The source is read, and nothing changes in your ERP, shop or accounting system. If you remove a source, PaperOffice also deletes its mirrored records.

How current is the data?

Pull sources and recipes sync on the interval you choose, between 15 minutes and 7 days. PaperOffice takes push data on arrival. With JTL-Wawi and Holded, PaperOffice fetches an order directly during the proof if it is missing or older.

GET STARTED

Connect your first source.

In the web app under **Knowledge Base AI** > **Operational sources**, use **Add source** to pick the connection, check it with the preview and set the proof. Your conversation agent then answers from the records.

paperoffice.ai/en/ai-ops-sources-business-data-order-status



MORE ABOUT THE MODULE

paperoffice.ai/en/ai-ops-sources-business-data-order-status

PRICING

paperoffice.ai/en/pricing

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