



[DATASHEET](#) · [AGENTS](#) · [PHONE ACCESS](#)

Partners call, and nobody is in the office? The workspace answers their questions on the phone.

With phone access, invited recipients query a workspace by phone: find documents, listen to contents, receive files by protected email. For partners, customers and field staff who need their documents without an app or login.

AT A GLANCE

Call, enter the PIN on the keypad, ask. The agent answers from exactly the workspace you shared and sends documents to the stored address.

01 · WHAT IT IS ABOUT

Questions come when no one is in. The workspace answers by itself.

A partner needs the term of a contract, a field rep needs a delivery address, and nobody picks up at the office. With phone access, the recipient calls, signs in with caller number and PIN and asks the agent in their own words. The answer comes from the shared workspace.

SIGN-IN

Call from the stored mobile number, PIN of 4–6 digits on the keypad

SCOPE

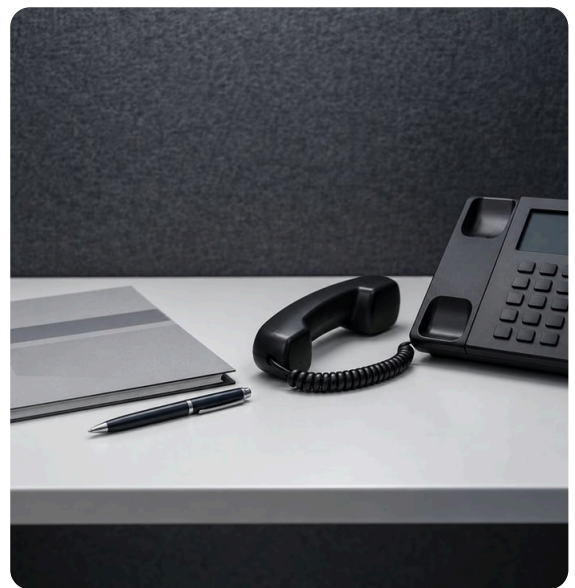
Exactly one shared workspace of the Business type

RESULT

Answers from the documents, and up to 10 documents by email on request

SETUP

Share in the web app, also managed via REST API and MCP


Sign-in with number and PIN

The call must come from a stored number, and callers type the PIN. After three failed attempts, the share stays locked for 15 minutes.

One workspace, nothing else

The agent searches and reads exclusively in the shared workspace. Other workspaces and the rest of the account stay closed to callers.

Send documents securely

On request, the agent sends up to 10 documents as protected PDFs. The password arrives by email or by SMS to a stored number.

Address from the share

You set the target address in the share. On the phone, the agent never asks for it and never changes it, even if the caller requests it.

Language and voice per share

You choose language, voice and an extra instruction for each share. Without your own choice, the defaults of the inbound line apply.

Phone, email or both

A share uses the phone on its own or together with email access. Valid for 7, 30 or 90 days, one year or without an end date.

02 · HOW IT WORKS

Share once. Then just let them call.

Phone access belongs to a workspace share. Who may call, with which number and PIN, and where documents go is all set in that share.

1

Open the share

Under `Document AI > Workspaces > Edit Workspace > Sharing`, click `New external share`.

2

Choose the phone channel

Choose the `Phone` channel and enter `Recipient mobile number` and `PIN (4–6 digits)`. You pass the PIN on to the recipient yourself.

3

Set up delivery

Enter `Email for document delivery` and choose whether the PDF password arrives by email or SMS. Then `Save and activate sharing`.

4

Let them call

The recipient dials the inbound number, types the PIN and the hash key, and asks a question in their own words.

TECHNICAL DATA

FEATURE	DETAILS
Sign-in	Stored caller number and PIN of 4–6 digits on the keypad, ending with #
Protection	3 failed attempts, then a 15-minute lock; calls with a withheld number are rejected
Scope	One workspace of the Business type, access View + Download
Agent on the call	Search documents, read text and sections, workspace overview, delivery
Delivery	Up to 10 documents to the share's address, PDF password by email or SMS
Validity	7, 30 or 90 days, 1 year or no end date; default 30 days
API and MCP	POST <code>/paperoffice_account/share_workspace</code> ; <code>po_workspaces_share_create</code> , <code>po_workspaces_shares_list</code>

03 · IN PRACTICE

Where phone access saves the callback.

Partner firm asks about deadlines

You share the Contracts workspace with a partner law firm. The firm calls: "When does the maintenance contract end?" The agent states the term and, on request, emails the contract.

Field sales in the car

A phone-only share for the field team. Before an appointment, the rep asks for the latest delivery note and receives it at the stored address.

Owners request their documents

A property manager shares one workspace per owner. Anyone who needs the service charge statement calls and receives it as a protected PDF, with the password by SMS.

FREQUENTLY ASKED QUESTIONS

Who can call?

Recipients of a share with the phone channel, from a stored number and with their PIN. Without both, the agent gives no information from the workspace.

Where do sent documents go?

To the email address you set in the share. Each PDF is protected with a password that arrives by email or by SMS to a stored number.

Do callers need an app or an account?

No. A phone and the PIN are enough. If you choose the phone channel alone when sharing, the share is active right away, with no email invitation.

Do callers learn that an AI agent is speaking?

Yes. Before the PIN prompt, an announcement says that an AI assistant is speaking and that calls may be recorded. If the caller objects, the audio recording stops and this call's audio is deleted.

GET STARTED

Share your first workspace for the phone.

Open **Document AI** › **Workspaces** › **Edit Workspace** › **Sharing**, choose the **Phone** channel and enter number and PIN. Then call from that number yourself and hear what the agent answers.

paperoffice.ai/en/ai-phone-agent-workspace-share-gateway



MORE ABOUT THE MODULE

paperoffice.ai/en/ai-phone-agent-workspace-share-gateway

PRICING

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