

The same question
on every channel?

**From now on, your
agent answers
from your
knowledge.**

Website chat, phone and customer portal. This guide shows step by step how to build a knowledge base and set up the Conversation Agent: your agent answers from your knowledge, and open issues become tickets with their history.

TRY IT YOURSELF IN 45 MINUTES

An online pet supplies shop in eight files: questions and answers, an internal goodwill rule, three orders and a customer request with a photo. Includes a test package for you to try yourself.

WHY THIS GUIDE

The answer already exists. Just not where people ask.

Customers ask in the chat, on the phone and in the portal, often the same thing. The answer sits on a help page or in a note, and every time someone searches again.



In many service teams, the day starts with the same questions: Where is my order, how long does shipping take, can I return this? The team knows the answers. Still, they are typed again every day, explained again on the phone and retold at every handover.

This guide shows how PaperOffice takes over this part: a knowledge base as the shared source, a Conversation Agent for website chat and phone, tickets with their history and a customer portal, every step with its click path. With our test package, you can try it yourself in 45 minutes.

Daniel Schönland

Founder and CEO, PaperOffice



WHO THIS IS FOR

Service managers

You are responsible for answers, deadlines and the team and want to see what is still open.

Service team

You answer requests in the chat, on the phone and in the portal and do not want to start from scratch every time.

Shop and website

You maintain help pages and order data and want the agent to give the same information.

WHAT YOU CAN ACHIEVE AFTERWARD

Create a knowledge base, keep internal notes apart, set up a Conversation Agent for website chat and phone, take over open issues as tickets and draft replies with the Ticket Copilot.

OVERVIEW

Contents

01	Monday morning in customer service	04
02	What holds customer service up	05
03	The process at a glance	06
04	Creating knowledge: articles and FAQs	07
05	Connecting your website and orders	08
06	Creating the Conversation Agent	09
07	Testing and embedding the website chat	10
08	Answering on the phone	11
09	When your team should take over	12
10	Setting up the customer portal	13
11	Ticket overview and deadlines	14
12	Replying with the Ticket Copilot	15
13	What service teams ask when they start	16
14	Try it yourself in 45 minutes	17
15	Read more: datasheets and short guide	18
16	Your first result in five days	19
17	Checklist and start	20

AT A GLANCE

- A knowledge base holds articles and FAQs, each entry with a status. Customers and public agents read what is published, internal entries stay with the team.
- The Conversation Agent with the “Public agent” role answers in the website chat and on the phone from the knowledge bases you assign to it.
- It gives the order status only after verification, such as the order number and postal code.
- Whatever your team should handle becomes a ticket with its history: in the chat via “Send a request”, on the phone via an SMS form or a callback request, in the customer portal directly.
- In the ticket overview, deadlines apply per priority. The Ticket Copilot drafts the reply, and your team reviews and sends it.

01 · MONDAY MORNING IN CUSTOMER SERVICE

One weekend, three channels. Almost always the same question.

Monday, 8:00 a.m. Lena Hartwig from the customer service team of Napfwerk Tierbedarf GmbH opens the contact form, the shop chat and the answering machine.



Over the weekend, there was a promotion on dry food. In the contact form, customers ask when their order will arrive and whether the “Landhuhn” food is grain-free. On the answering machine, three callers ask for a callback, one because of a damaged parcel. The shop chat holds questions that nobody answered after hours.

Sabine Krüger has written twice and called once, each time about the same order. The shipping times are on the shop's help page, the goodwill rule for damaged deliveries is in a note from the team lead.

THE REAL HURDLE

The team knows the answers. The time goes into searching and typing them again every time and retelling the history at every handover.

02 · WHAT HOLDS CUSTOMER SERVICE UP

Four time-wasters. Each one small on its own.

Hardly any customer question is difficult. The time goes into the same questions arriving through different channels and every answer being written by hand.

Same question, typed again

Shipping, returns, ingredients: the answers are on the help page but get rephrased in the chat and on the phone every time.

Every channel on its own

Form, chat and phone end up in different places. Whoever answers cannot see what the customer asked elsewhere yesterday.

Looking it up in the shop system

For every question about delivery status, someone opens the shop system, looks up the order and gets back to the customer.

Handover without history

Callback requests sit on slips of paper. Who answers by when is known solely to whoever has the request right now.

TIME SINK	HOW PAPEROFFICE HELPS	IN THE TEST PACKAGE
Same question	A knowledge base the agent answers from in the website chat and on the phone	FAQ "How long does shipping take?"
Every channel on its own	Open issues from website chat, phone and customer portal become tickets in one ticket overview	Request in the customer portal
Looking it up	Operational source with the orders, status after order number and postal code	Order NW-104733, postal code 34117
Handover	Ticket with conversation history, assignment and deadlines per priority	Ticket with a Copilot draft

All examples come from our test package with the fictional Napfwerk Tierbedarf GmbH. How your agent answers depends on your content and instructions.

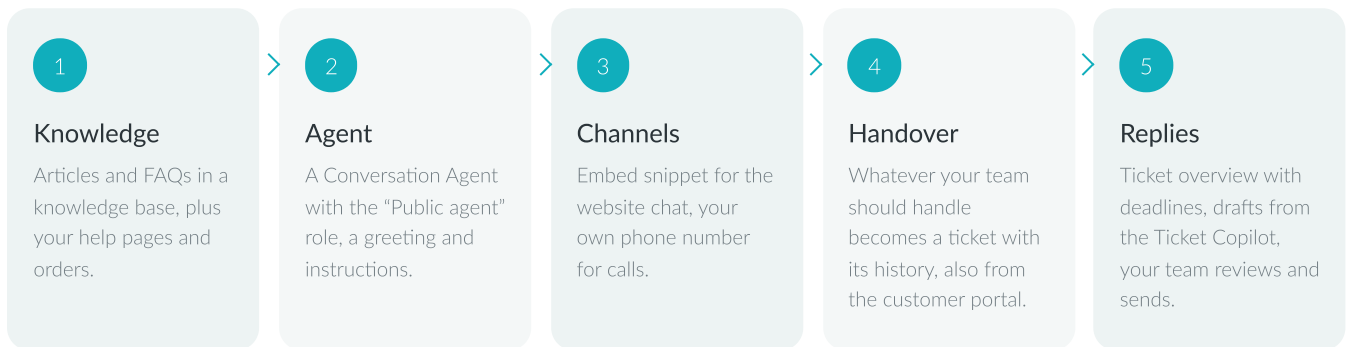
WHAT REMAINS IN YOUR HANDS

Goodwill, complaints and special cases. PaperOffice answers standard questions from your knowledge. Whatever your team should handle arrives as a ticket with its history: via "Send a request" in the chat, via the SMS form or a callback request on the phone, and from the customer portal.

03 · THE PROCESS AT A GLANCE

Five stations. From the question to the answer.

Every request follows the same path, whether it starts in the website chat, on the phone or in the customer portal.



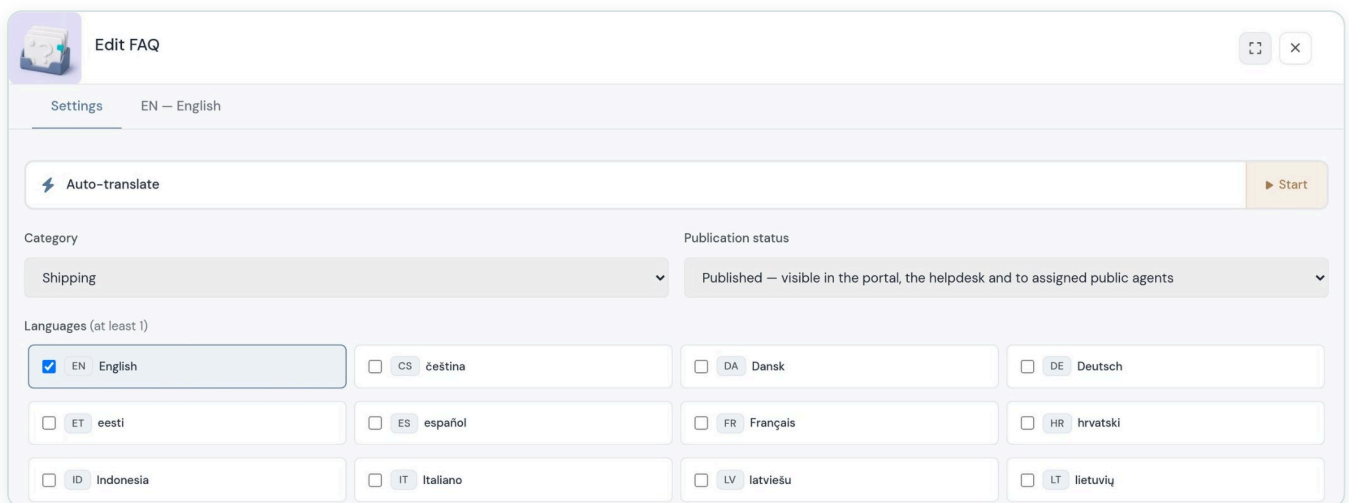
STATION	THIS IS WHAT PAPEROFFICE DOES	YOUR TEAM DETERMINES THIS
Knowledge	indexes published and internal entries, reads help pages on a schedule	what customers may read and what stays internal
Agent	answers from the assigned knowledge bases, without Workspace documents	tone, rules and topics that go to the team
Channels	chat on your domains, calls on your phone number	domains, phone number and languages
Handover	ticket with the chat or call history	which issues always go to a person
Replies	deadlines per priority, summary and draft	who assigns, reviews and sends



04 · CREATING KNOWLEDGE: ARTICLES AND FAQs

Write it once. The same answer everywhere.

Under **Knowledge Base AI** > **Articles**, create a knowledge base via **Manage Knowledge Bases**. Select it in the picker at the top, then create its categories and use **Create** for articles or FAQs in it.



- 1 An FAQ from the test package. The "Settings" tab holds the category "Shipping" and the publication status, the title and answer sit on the tab of the language. "Published" means: visible in the portal, the helpdesk and to assigned public agents.

ENTRY	CUSTOMER PORTAL	PUBLIC AGENT	CHAT AGENTS (AGENT AI)
Published	yes, in public knowledge bases	yes, in the website chat and on the phone	yes
Internal, such as a goodwill rule	no	no	yes
Page from a website source	no	yes	yes
Draft, Archived	no	no	no

Article, FAQ, snippet

Articles for guides, FAQs for short question-and-answer pairs, snippets for reusable text blocks.

More languages

"Translate" uses AI to carry title, summary, content and tags over into the selected languages.

Internal notes

Set goodwill rules and arrangements to "Internal". Your team reads them, the portal and public agents do not.

05 · CONNECTING YOUR WEBSITE AND ORDERS

Let it read your help pages. Orders after verification.

Two sources add to your articles: website sources read your help pages, and operational sources mirror orders from your shop or ERP.

Website sources

Under **Knowledge Base AI** > **Website sources**, use "Add source": start URL, knowledge base and refresh interval, such as "Daily". "Preview" shows in advance what the crawler finds. Each page becomes an internal article that public agents of this knowledge base also read.

Operational sources

Under **Knowledge Base AI** > **Operational sources**, use "Add source" and choose the connection: recipes for JTL-Wawi and Holded, push, pull REST, JSON file or JSON records. The records are mirrored, and your system stays unchanged.


Edit operational source
Ready

Basics
 Connection
 Mapping
 Messages
 Preview
 Proof
 Sync
 Usage

End customers see records only after one of these proofs.

☒ Order number and postal code	☐ SMS one-time code to the number on the record
☐ Caller number (ANI) on the phone agent	

- 1 **Set the proof.** End customers see records only after one of these proofs. In the test package, it is "Order number and postal code". A proof is valid for 15 minutes for exactly this case.
- 1 **Connection:** on the "Basics" tab, choose "JSON records" under "Connection", then paste the records from Order_data.json into the "Records JSON" field on the "Connection" tab.
- 2 **Preview:** "Preview without saving" shows up to 20 records as they arrive.
- 3 **Mirror:** after saving, "Sync now" fetches the records. Pull sources and recipes then sync at their interval.

GOOD TO KNOW

The answer relies on the shipping status in the record. PaperOffice recognizes common values such as shipped or delivered as "In transit" or "Delivered".

06 · CREATING THE CONVERSATION AGENT

One agent for chat and phone. With your knowledge.

Under **Conversation AI** > **Conversation Agents**, use **New Conversation Agent**. One agent serves both channels, and the editor tabs guide you through the setup.

Napfwerk Service
Napfwerk Service Active

How it works

Overview Telephony Requests Referrals Website chat Security Agent Allowed languages Knowledge

Basic data
Name and status of this Conversation Agent.

Name
Napfwerk Service

Status
Active

Role & access
Defines which data the agent may use and who may use the agent.

☒ **Public agent** External Knowledge Bases
Uses behavior and instructions plus selected Knowledge Bases. No Workspace documents.

☐ **Protected agent** External Workspaces Knowledge Bases
Uses selected Workspaces. The caller must authenticate (share: mobile number + PIN).

☐ **PaperOffice user agent** Internal Workspaces Knowledge Bases
Grants access according to the PaperOffice user's permissions.

- 1 **Choose the role.** The "Public agent" uses behavior and instructions plus selected Knowledge Bases. Workspace documents stay locked for it, on the phone and in the website chat.

TAB	WHAT YOU SET THERE
Overview	name and role of the agent
Agent	greeting, instructions, voice and language
Knowledge	the knowledge bases the agent answers from
Allowed languages	the languages it may switch to during a conversation
Website chat, Security	domains, embed snippet and protection against misuse (chapter 07)
Telephony, Requests	phone number and handover to your team (chapters 08 and 09)

WHAT GOES WHERE

The instructions hold the role, tone, form of address and limits, such as "For damaged deliveries and goodwill questions, refer to a request to the team." Facts such as delivery times or return rules belong in the knowledge base.

07 · TESTING AND EMBEDDING THE WEBSITE CHAT

Ask in the test lab first. Then go live on the website.

On the **Website chat** tab, you enable the chat, enter your domains and, after saving, copy the embed snippet.

Website chat
Your agent. Directly on your website.

Enabled ☒

Website access
Define where the agent is available.

Display name
Napfwerk Service
Shown in the website chat header. Empty uses the agent name from Basic data.

Allowed domains
https://www.napfwerk.example
One origin per line - HTTPS required

Embed
Connect the agent to your website.

HTML snippet [Sample code](#)

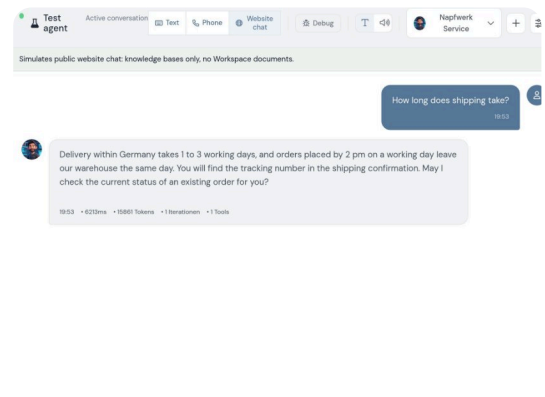
```
1 <script>
2 window.poChatSettings = { site_key: 'pck_79be871508ae82582791a2937a32b' };
3 window.PaperOfficeChat = window.PaperOfficeChat || function () {
4   (window.PaperOfficeChat.q = window.PaperOfficeChat.q || []).push(arguments);
5 };
6 </script>
7 <script async src="https://api.paperoffice.ai/dev/conversation_chat/loader.js"></script>
```

1 **Website access and embedding.** One domain per line, using HTTPS, also with wildcards such as `https://*.example.com`. The address of your privacy notice is required. Insert the embed snippet before `</body>`.

1 **Test:** Conversation AI > Test agent, channel "Website chat". It simulates the public chat: knowledge bases, no Workspace documents.

2 **Check:** ask the test questions from the package. The internal goodwill rule must not appear in any answer.

3 **Embed:** copy the snippet and insert it into your website. The widget appears on the allowed domains.



Language of the page

The chat answers in the language of your page if it is one of the allowed languages, otherwise in the agent's language.

Recognizable as AI

"AI assistant" appears under the name in the chat window. The agent links articles that have a web address in its answer.

Protection

A maximum of new conversations per hour and allowed countries. Above the limit and for blocked visitors, the widget shows an email form.

08 · ANSWERING ON THE PHONE

Your own phone number. The same agent on the line.

On the **Telephony** tab, use **Request phone number** to request your own phone number. Forward calls from your company number to it.

Own phone number

Public callers reach this Conversation Agent directly via a dedicated phone number.

Request phone number

- 1 Own phone number.** Public callers reach the agent directly via this number. PaperOffice assigns it from its pool and gets in touch regarding the assignment. Save the agent once beforehand.

TOPIC	HOW THE AGENT WORKS ON THE PHONE
Greeting	Your greeting is spoken exactly as you enter it. PaperOffice adds the notice about the AI assistant and possible recording if it is missing. If the caller objects, the audio recording stops.
Language	Start language fixed, by the number dialed or by the caller's country code. On request, it switches to an allowed language, with a voice per language.
Answers	from the knowledge bases on the "Knowledge" tab, in short sentences
Order status	after the proof set for the source: order number and postal code, SMS code or caller number
Email address	once by voice, and it repeats the address for confirmation. If that does not work, it offers mobile callers an SMS with a form where they type it in.
Log	every call under "Call Log" with transcript, summary and sentiment

GOOD TO KNOW

The agent takes calls as soon as they come in, including evenings and weekends. Whatever it should not settle, it records as a request for your team (chapter 09).

09 · WHEN YOUR TEAM SHOULD TAKE OVER

Open issues become tickets. The history comes along.

Whatever the agent should not settle becomes a ticket. In the chat, the customer leaves an email address, on the phone they type it into a form.

Enabled ☒

Confirm before recording

The agent repeats the matter in one sentence and records only after a yes. Explicit requests go through at once.

☒

Follow up on name and company

Off: as today — the agent asks casually for the name but never waits for it.
On: before sending, the code follows up once for name and company; if the caller does not give them, the request is still recorded.

☒

Escalation brake

How many own answer attempts the agent makes before offering to record or call back on its own. Explicit caller wishes always apply immediately. "Offer immediately" is today's behaviour.

Offer immediately (today's beh.

Ticket confirmation

When the agent files a request as a ticket, the caller can receive the case number right away — spoken, by text message, or by e-mail to the address of a verified order.

Phone

On the "Requests" tab, enable "Record Request". The caller receives an SMS with a link to the form, valid for 48 hours. Submitting it creates the ticket with the call history. Without SMS, the agent creates a callback request to the recognized phone number as a ticket.

Website chat

Via "Send a request", the visitor enters an email address. The ticket brings the chat history along, and the confirmation arrives by email with a link for further details. Disposable addresses are rejected.

SK Today - 10/21/2026, 07:06 PM Kundenportal

DE Sabine Krüger

Hello,

The box arrived crushed, and two bags of Landhuhn are torn open. I will add a photo in the ticket.

Kind regards

Sabine Krüger

← Back #TIC-PT-2026-000001

Damaged parcel, order NW-104733 🗑

SOURCE

Customer portal

TICKET DETAILS

Status Open

SLA deadlines No SLA deadlines configured

Priority High

Assigned Reviewer A – Guide

- 2 The "Source" card. It names the channel of the ticket, here "Customer portal", otherwise such as "Website chat", "Phone · AI agent (request via link)" or "Phone · callback request". For calls, the "Call T-..." reference opens the call log with transcript and recording for authorized users.

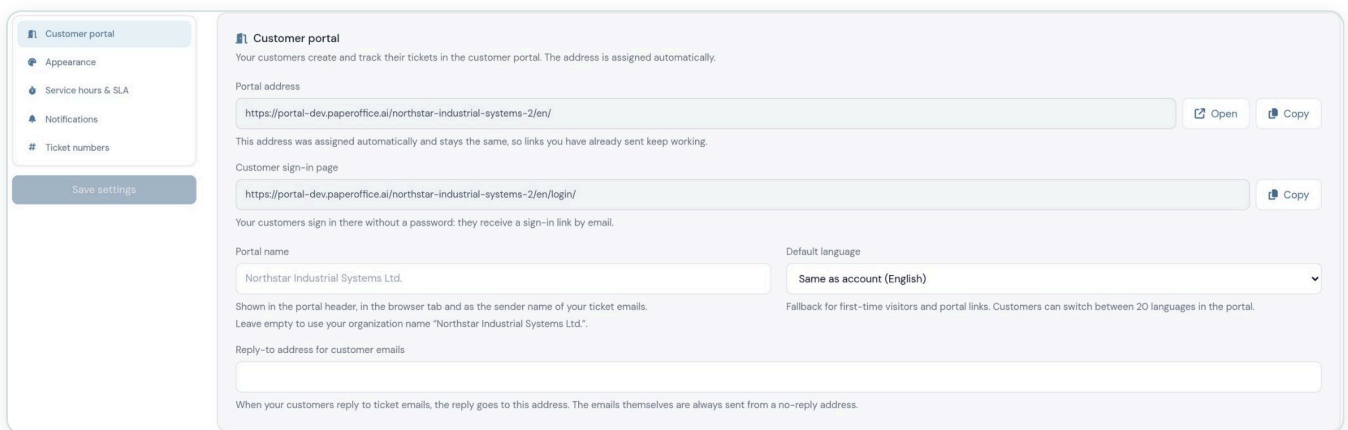
GOOD TO KNOW

The ticket number shows the source: PT for the customer portal, CH for the website chat, TE for the phone. With "Confirm before recording", the agent repeats the issue in one sentence and records it only after a yes.

10 · SETTING UP THE CUSTOMER PORTAL

Your portal, your name. Sign-in by link.

Under **Helpdesk AI** > **Settings**, you set up the customer portal. The portal address is set up automatically the first time you open it and stays the same.



Customer portal
Your customers create and track their tickets in the customer portal. The address is assigned automatically.

Portal address

Open Copy

This address was assigned automatically and stays the same, so links you have already sent keep working.

Customer sign-in page

Copy

Your customers sign in there without a password: they receive a sign-in link by email.

Portal name

 Default language

Shown in the portal header, in the browser tab and as the sender name of your ticket emails. Leave empty to use your organization name "Northstar Industrial Systems Ltd.".

Fallback for first-time visitors and portal links. Customers can switch between 20 languages in the portal.

Reply-to address for customer emails

When your customers reply to ticket emails, the reply goes to this address. The emails themselves are always sent from a no-reply address.

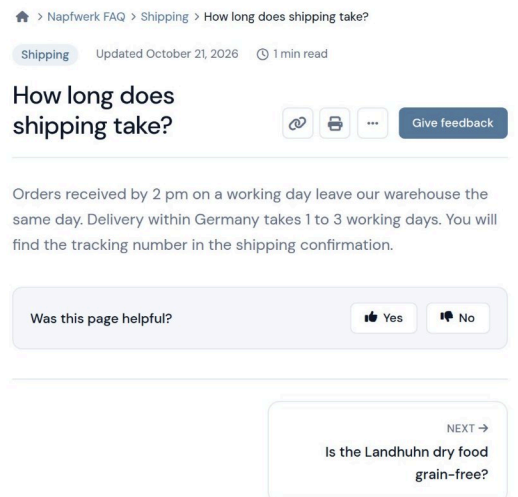
1 **Customer portal.** The portal name appears in the portal header, in the browser tab and as the sender name of your ticket emails. Under "Appearance", choose the primary and accent color; the logo is your organization image.

1 **Sign in:** without a password, with a sign-in link by email.

2 **Create a ticket:** "New support ticket" with subject and message. Without signing in, name and email address are added, and the access link follows by email.

3 **Reply:** write back in the ticket and attach a photo, for example, with "Add file".

4 **Read up:** the published articles under "Help & FAQ", with "Was this page helpful?" and "Suggest a topic".



Home > Napfwerk FAQ > Shipping > How long does shipping take?

Shipping Updated October 21, 2026 1 min read

How long does shipping take?

Give feedback

Orders received by 2 pm on a working day leave our warehouse the same day. Delivery within Germany takes 1 to 3 working days. You will find the tracking number in the shipping confirmation.

Was this page helpful? Yes No

NEXT →
Is the Landhuhn dry food grain-free?

Ticket numbers

A prefix of 2 to 8 characters, such as NAPF. It is fixed as soon as the first ticket has been numbered.

Notifications

If you wish, an email goes to your team for every new ticket, to up to 10 addresses.

11 · TICKET OVERVIEW AND DEADLINES

Every issue with a status. Every deadline in view.

Under **Helpdesk AI** > **Ticket overview** , all tickets appear with source, contact, summary and activity. You set deadlines per priority in the settings under **Service hours & SLA** .

1 The overview. Two tickets from the customer portal, filterable by status, priority and source. You set priority and assignment in the ticket under "Ticket details".

PRIORITY	RESPONSE TIME	RESOLUTION TIME
Urgent	1 hour	8 hours
High	2 hours	24 hours
Normal	8 hours	2 days
Low	24 hours	7 days

Defaults when you turn on "Enable SLA deadlines", adjustable from 5 minutes to 90 days. Time counts within your business hours and time zone, or around the clock without entries. From the warning threshold, 80% of the deadline by default, a ticket counts as due soon. With active deadlines, the overview shows the running deadline with the time left for each ticket, such as "Response", and an expired one as "SLA overdue".

Status

New, Open, Pending, Closed and more. Tickets from the customer portal start as "Open".

Bulk actions

Select several tickets, then "Change status", "Priority" or "Assign".

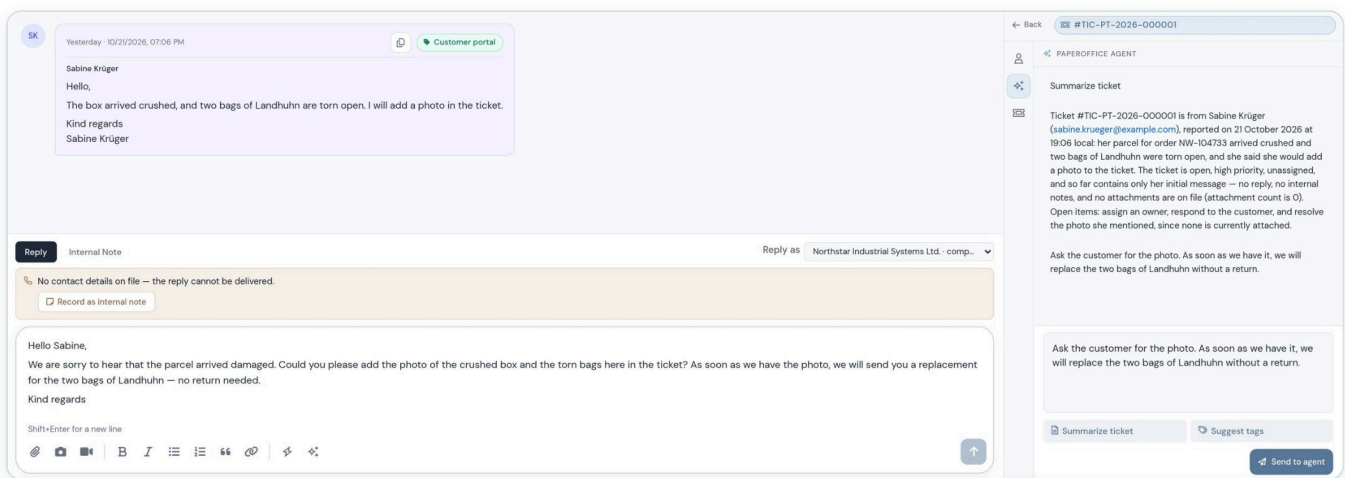
Dashboard

Under **Helpdesk AI** > **Dashboard** : Overdue, Unassigned, Urgent and a 7-day trend.

12 · REPLYING WITH THE TICKET COPILOT

Summarize first. Then review the draft.

Under **Helpdesk AI** > **Ticket overview**, open the ticket. On the right, the **PaperOffice Agent** side panel opens the Ticket Copilot. It acts on your click; opening the ticket alone does not start it.



- 1 **Summarize and draft.** "Summarize ticket" sums up the request and its status in a few sentences. Below, write what the customer should hear and click "Send to agent". The draft then appears in the reply field, and the summary stays in the side panel. The screenshot shows "No contact details on file" because of the invented @example.com address.
- 1 **Instruct:** base the instruction on your rules. Under **Knowledge Base AI** > **Articles**, your team also reads internal entries, such as the goodwill rule: a replacement without a return only with a photo.
- 2 **Review and send:** your team reviews the draft, adjusts it and sends it itself. Shift+Enter starts a new line, and Enter or the arrow at the bottom right sends. The copilot does not send.
- 3 **Ticket details:** you set status, priority and assignment on the "Ticket" tab under "Ticket details". Check the summary against them.
- 4 **Coordinate:** the customer does not see an "Internal Note".
- 5 **Customer reads:** they receive an email notice, and the button in it signs them in to the portal.

LEARN FROM EVERY CONVERSATION

Chat Log

Every chat with page, location, history and ticket number.

Call Log

Every call with transcript, summary and sentiment.

Knowledge gaps

Questions from calls that stayed open, as a suggestion for an article.

Article ratings

Weakest articles first, with the feedback from the portal.

13 · WHAT SERVICE TEAMS ASK WHEN THEY START

Seven questions before the first customer chat.

**Where does the agent get its answers?**

From the knowledge bases you assign to it on the “Knowledge” tab: published articles and FAQs as well as pages from website sources. It reads the order status from your operational sources after verification.

Does the agent see internal notes?

No. Entries with the “Internal” status are read by your team and internal agents. The portal, the website chat and public agents do not get to see them.

Can customers tell that an AI is answering?

Yes. “AI assistant” appears under the name in the chat window. On the phone, an announcement after your greeting says that an AI assistant is speaking and that the call may be recorded.

What happens if the agent cannot help?

In the chat, the customer sends a request with their email address via “Send a request”. On the phone, they get an SMS link to a form or leave a callback request. The submitted form and the callback request become tickets with their history.

How does the agent take an email address on the phone?

Once by voice, and it repeats the address for confirmation. If it is not recognized correctly, it offers mobile callers an SMS with a form where they type it in.

Does the copilot reply to customers itself?

No. The copilot writes the draft into the reply field, and your team reviews, adjusts and sends it. In the website chat and on the phone, the agent answers from your knowledge.

What does it cost?

Billing is based on usage. Knowledge Base AI and Helpdesk AI are included from the Plus plan, website chat and phone with Conversation AI from the Professional plan. The pricing page shows the details: paperoffice.ai/en/pricing.

14 · TRY IT YOURSELF IN 45 MINUTES

Download the test package. Play through a service day.

Eight invented files from an online pet supplies shop show the whole path: from the first FAQ entry to the reply with the copilot.

CUSTOMER SERVICE TEST PACKAGE

Eight files and a guide (README.txt)

FAQ_Shipping.txt FAQ "How long does shipping take?"

FAQ_Grain_free.txt FAQ about the "Landhuhn" dry food

Article>Returns.txt Article "Returns and exchanges"

Internal_note_goodwill.txt Goodwill rule for the "Internal" status

Order_data.json three orders as JSON records

Test_questions.txt seven questions for "Test agent"

Portal_request.txt text for a ticket in the customer portal

Photo_parcel.jpg photo of a damaged parcel

paperoffice.ai/downloads/paperoffice-ai-test-package-customer-service.zip



- 1 Knowledge:** knowledge base "Napfwerk FAQ" with visibility "Public (Portal)". The three texts as "Published" FAQs or article, the goodwill rule as "Internal" (chapter 04).
- 2 Orders:** operational source with the "JSON records" connection and the proof "Order number and postal code" (chapter 05).
- 3 Agent:** Conversation Agent "Napfwerk Service", role "Public agent", the new knowledge base on the "Knowledge" tab (chapter 06).
- 4 Test:** Conversation AI > Test agent, channel "Website chat", ask the test questions (chapter 07).
- 5 Portal and copilot:** create a ticket in the customer portal with the text from Portal_request.txt, add the photo in the ticket with "Add file", then open it in the ticket overview and reply with the copilot (chapters 10 to 12).

FILE	WHAT TO LOOK FOR
FAQs and article	The answers in the test lab give delivery times, ingredients and the return period from the entries.
Internal note	The goodwill rule does not appear in any of the agent's answers.
Order data	The agent gives the status of NW-104733 only after the order number and postal code 34117.
Portal request	Ticket with PT in the number, summary, and the copilot's draft in the reply field.

All companies, names, addresses, order numbers and values in the test package are fictional. The cost of the test is shown on the pricing page: paperoffice.ai/en/pricing.

15 · [READ MORE: DATASHEETS AND SHORT GUIDE](#)

Every building block in detail. As a datasheet to take along.

For every module in this guide, there is a datasheet with menu paths, settings and frequent questions. The short guide Customer Service gives the overview on eight pages.

CHAPTER	DATASHEET	WHAT IT COVERS
04 Knowledge	Knowledge Base	articles, FAQs, snippets, status and languages
05 Sources	Website Sources, Business Data for AI Agents	reading help pages, orders after verification
06 to 09 Agent	Conversation Agent · Web Chat and · Phone	role, embed snippet, phone number, handover
10 and 11 Tickets	Ticket System, Helpdesk AI	customer portal, ticket numbers, deadlines, dashboard
12 Replies	Ticket Copilot	summary and drafts

[DATASHEET](#)

Knowledge Base

[DATASHEET](#)

Website Sources

[DATASHEET](#)

Business Data for AI Agents

[DATASHEET](#)

Conversation Agent · Web Chat

[DATASHEET](#)

Conversation Agent · Phone

[DATASHEET](#)

Ticket System

[DATASHEET](#)

Helpdesk AI

[DATASHEET](#)

Ticket Copilot

[SHORT GUIDE](#)

Customer service on eight pages

[SHORT GUIDE CUSTOMER SERVICE](#)

Problem, path, click paths, an example and a checklist for your team:
paperoffice.ai/downloads/paperoffice-ai-short-guide-prozess-kundenservice.pdf



16 · YOUR FIRST RESULT IN FIVE DAYS

Start with one channel. Then add each next one.

To get started, all you need are your customers' ten most frequent questions, one agent and the website chat on one domain.

1

Day 1 · Knowledge

Create a knowledge base, write the ten most frequent questions as FAQs, set internal rules to "Internal".

2

Day 2 · Sources

Add a website source for the help pages, connect an operational source for orders, set the proof.

3

Day 3 · Agent

Create the Conversation Agent, write the instructions, check it in the test lab with real customer questions.

4

Day 4 · Channels

Embed the website chat on one domain, request your own phone number, enable "Record Request".

5

Day 5 · Team

Set up the customer portal, ticket numbers and deadlines per priority, define responsibilities, answer the first tickets with the copilot.



MEASURE THESE FOUR VALUES

No ticket

Chats and calls in the logs that ended without a ticket number

Tickets per channel

PT, CH and TE in the ticket numbers

Deadlines

Tickets that were never flagged "SLA overdue"

Gaps

Knowledge gaps from calls and weak articles in the ratings

Measure the first week precisely. Only by comparing it with the following weeks will you see how many answers your team no longer types itself.

17 · CHECKLIST AND START

Before you expand.

- ☐ The most frequent questions are published FAQs in a knowledge base.
- ☐ Internal rules and notes carry the “Internal” status.
- ☐ A website source and an operational source are connected, and the proof is set.
- ☐ The Conversation Agent has the “Public agent” role and the right knowledge bases.
- ☐ It has been checked in the test lab with real customer questions.
- ☐ The website chat is embedded on your domains, and your own phone number has been requested.
- ☐ Customer portal, ticket numbers and deadlines per priority are set up.
- ☐ Someone assigns tickets daily and checks knowledge gaps and article ratings.

GET STARTED NOW

Create your account, fill your first knowledge base and ask the agent in the test lab. Billing is based on usage. app.paperoffice.ai

THE SOLUTION ON PAPEROFFICE.AI

Customer service with knowledge base, website chat, phone and ticket overview:
paperoffice.ai/en/solutions/process/ai-customer-service-automation-chatbot



READ MORE

MODULE

Helpdesk AI: tickets, portal and deadlines

MODULE

Knowledge base: articles and FAQs

CONTACT

Questions about the setup:
paperoffice.ai/en/contact

As of October 2026. Screenshots are from a test account. All examples, company names, personal names, addresses, order numbers and values in this guide are fictional.
PaperOffice, paperoffice.ai.