



SHORT GUIDE · PROCESS · CUSTOMER SERVICE

Every service channel its own inbox? Chat, portal and phone in one ticket overview.

Warranty, spare parts, delivery date: customers ask in the website chat, in the customer portal and on the phone. This short guide shows how the Conversation Agent answers from your knowledge, how customer requests arrive as tickets with their history and how your team works everything in one place.

THE KEY POINT IN ONE SENTENCE

The agent answers from your knowledge base, gives the order status after verification, and a customer's request arrives as a ticket with its history in one overview with an SLA per priority.

01 · THE PROBLEM

Every channel has its own pile.

A customer asks about a spare part in the chat, calls the next day about their warranty case and then sends an email as well. Each request lands somewhere else, and whoever answers knows nothing of the others. The customer explains the issue from scratch every time.

WHY IT HAPPENS

Every channel has its own inbox

Chat messages, phone notes and emails sit apart. Whoever works a request cannot see what the customer asked yesterday through another channel.

Answers live in heads and binders

Each colleague knows warranty terms, spare part numbers and delivery times in their own way. Depending on who answers, the same question gets a different reply.

The history gets lost in a handover

When an issue is passed on, what was already said is often missing. The customer repeats themselves, and your team starts again from zero.

HOW YOU NOTICE IT

- Customers describe their issue from scratch on the second contact.
- Callback requests sit on slips of paper or in a list that a single person keeps.
- Whether a request has been answered is known solely to whoever handled it.
- Questions about delivery status arrive by chat, phone and email several times over.
- After hours, questions wait until the team is back.

02 · THE WAY WITH PAPEROFFICE

One knowledge base, one ticket overview.

Website chat and phone answer standard questions from your knowledge base. Whatever a person needs to settle becomes a ticket with the conversation history, and so does every request from the customer portal. Your team works it all in one ticket overview.

1

Connect knowledge and order data

Articles and FAQs live in the knowledge base, maintained per language. Operational sources mirror orders, invoices and prices from your shop or ERP, with recipes for JTL-Wawi and Helded.

[MODULE: KNOWLEDGE BASE](#)

2

Answer in the website chat

The Conversation Agent answers from the knowledge bases you assign, in the language of your page. It links articles that have a web address so customers can read up themselves.

[MODULE: CONVERSATION AGENT · WEB CHAT](#)

3

Answer on the phone

On your own phone number, the same agent takes calls, and after your greeting an announcement covers AI and recording. It gives the order status after the order number and postal code.

[MODULE: CONVERSATION AGENT · PHONE](#)

4

Open issues become tickets

In the chat, the customer sends a request with their email address and the history; on the phone, an SMS link leads to a form. In the customer portal, they open tickets themselves.

[MODULE: TICKET SYSTEM](#)

5

Team replies, customer reads in portal

The Ticket Copilot summarizes the history and drafts the reply in the customer's language. Your team sends it, and the customer gets an email notice and reads it in the portal.

[MODULE: TICKET COPILOT](#)

03 · IN THE APP

How to set up the service process.

Five steps in the app. Helpdesk AI is included from the Plus plan, and website chat and phone with Conversation AI from the Professional plan.

1

Provide knowledge and data

Under **Knowledge Base AI** › **Articles**, write articles and FAQs. Under **Knowledge Base AI** › **Operational sources**, connect orders from your shop or ERP so the agent can give the status after verification.

2

Create the agent

Under **Conversation AI** › **Conversation Agents**, create an agent with the **Public agent** role, write the greeting and instructions and choose the knowledge bases it answers from.

3

Open chat and phone

On the **Website chat** tab, enter your domains and copy the **Embed snippet**. On the **Telephony** tab, request your own phone number and forward your company number to it.

4

Set up portal and deadlines

Under **Helpdesk AI** › **Settings**, set the portal name and colors; your organization image serves as the logo. Then enter response and resolution times per priority in your business hours.

5

Work the tickets

Under **Helpdesk AI** › **Ticket overview**, assign and reply. In the **PaperOffice Agent** side panel, the copilot summarizes the history and puts the draft into the reply field.

TIP FROM PRACTICE

Set internal notes to Internal Public agents answer from published entries and your website sources. Set internal notes such as goodwill rules to the Internal status, and they stay hidden from the portal, the website chat and public agents.

04 · AN EXAMPLE

A home appliance maker in customer service.



A manufacturer of washing machines and dryers with eight people in customer service. Customers ask about warranty, spare parts and delivery dates by phone, email and through the contact form. Warranty claims are printed out and handed around.

BEFORE

- Warranty claims arrive by email and mail and sit printed on the desk.
- Each colleague answers spare part questions from their own notes.
- On a callback, the customer describes the issue from scratch again.
- Who has which request is on a list on the team table.

WITH PAPEROFFICE

- The agent answers standard questions on warranty and spare parts in the chat and on the phone.
- It gives the delivery status from the shop data after order number and postal code.
- Warranty cases arrive as tickets with history, and customers send photos and receipts in the portal.
- The team lead assigns in the ticket overview, and the copilot drafts the reply.

A made-up example for illustration. Check for yourself which warranty and order details your agent may share and which issues should always go to a person.

05 · CHECKLIST

Is your service ready for one ticket overview?

Go through these points with your service team, ideally with the requests from recent weeks at hand.

- | | |
|--|--|
| ☐ Through which channels do your customers ask today, and where does each request land? | ☐ Which questions does your team hear most often, and where is the answer today? |
| ☐ Which content may customers hear, and which stays internal? | ☐ Which order details should the agent share, and which system do they come from? |
| ☐ Which verification lets a customer learn their order status? | ☐ On which domains should the website chat appear? |
| ☐ Which issues should always go to a person, such as complaints or goodwill cases? | ☐ Who on the team works tickets, and who assigns them? |
| ☐ What response and resolution time applies per priority? | ☐ In which languages do your customers ask, and which voice fits on the phone? |

06 · FREQUENTLY ASKED QUESTIONS

What service managers ask before they start.

Where does the agent get its answers?

From the knowledge bases you assign, and for the order status from your operational sources. Workspace documents stay locked for website visitors and callers.

What if the agent cannot help?

In the chat, the customer sends a request with their email address and the chat history. On the phone, they get an SMS link to a form, and the submitted form becomes a ticket. Or they leave a callback request as a ticket.

Does the copilot reply to customers itself?

The copilot drafts, your team sends. It puts the draft into the reply field or saves it as an internal note, and sending stays locked for it.

Can customers see where an answer comes from?

In the website chat, the agent links articles that have a web address, such as pages from website sources. That way customers can read up on the page themselves. On the phone, it answers in short sentences.

Can the customer tell that an AI is answering?

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

How do we keep track?

The ticket overview shows status, priority and assignment and flags tickets that are due soon or overdue once SLA deadlines are active. The dashboard shows key figures such as Overdue and Unassigned.

07 · HOW TO START

Start with one agent and one channel

Write the most frequent answers under **Knowledge Base AI › Articles**, create an agent under **Conversation AI › Conversation Agents** and embed the website chat. Billing is based on usage, and the pricing page shows the details.

Read the datasheets

Knowledge base, Conversation Agent for website chat and phone, business data, ticket system and Ticket Copilot are each described with menu paths.

Test the agent in the lab

Try the agent with real questions from your customers before the **Embed snippet** goes on your website.

Get started together

For setup and choosing a plan, we are happy to advise you through the contact page.

DATASHEETS ON THIS TOPIC

Knowledge Base

paperoffice.ai/downloads/paperoffice-ai-datasheet-knowledge-base.pdf

Conversation Agent · Web Chat

paperoffice.ai/downloads/paperoffice-ai-datasheet-conversation-agent-web-chat.pdf

Conversation Agent · Phone

paperoffice.ai/downloads/paperoffice-ai-datasheet-conversation-agent-phone.pdf

Business Data for AI Agents

paperoffice.ai/downloads/paperoffice-ai-datasheet-ops-sources.pdf

Ticket System

paperoffice.ai/downloads/paperoffice-ai-datasheet-ticket-system.pdf

Ticket Copilot

paperoffice.ai/downloads/paperoffice-ai-datasheet-ticket-agent.pdf

MORE ON THIS TOPIC

Customer service

paperoffice.ai/en/solutions/process/ai-customer-service-automation-chatbot



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