

# MaiAgent User Guide

## Table of Contents

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### 1. Registration and Login

- 1.1 Register an Account
- 1.2 How to Log in to the Platform
- 1.3 Forgot Password

### 2. Build Your Custom AI Assistant

- 2.1 AI Assistant Features
- 2.2 Create an AI Assistant
- 2.3 Multi-language Support
- 2.4 Role Instruction Design Guide
- 2.5 Add Role Instructions to AI Assistant
- 2.6 AI Customer Service Quality Management Guide

### 3. Create Tools for Your AI Assistant

- 3.1 Tool Feature Overview
- 3.2 Create MCP Tools
- 3.3 Create API Tools
- 3.4 Built-in AI Image Generation Tool
- 3.5 Text to SQL Feature
- 3.6 Using MaiAgent Knowledge Base for Text to SQL
- 3.7 Using Supabase for Text to SQL
- 3.8 Configure Tools for AI Assistant

### 4. Build Enterprise Knowledge Base

- 4.1 Knowledge Base Overview
- 4.2 How to Create a Knowledge Base: Basic Setup
- 4.3 How to Use Web Scraping (Data Crawling) Feature
- 4.4 How to Create FAQ

4.5 Document Management: Tags and Metadata

4.6 Search Testing

## 5. Deploy Your AI Assistant

5.1 Choose Integration Platform

5.2 Internal Q&A Features

5.3 Web Chat Introduction Overview

5.4 Integrate Chat Platform: Website

5.5 Integrate Chat Platform: LINE

5.6 Integrate Chat Platform: FB Messenger

5.7 Integrate Chat Platform: Telegram

## 6. Track AI Assistant Performance

6.1 All Conversations Features

6.2 Response Quality Control

6.3 Webhook

6.4 Usage Analytics

## 7. Differentiate AI Assistant Usage by Identity

7.1 Contacts

7.2 Knowledge Management Permissions: Query Metadata

7.3 Getting Started—Using the "Query Builder"

7.4 Organization and Permission Management

7.5 Organization and Member Settings

7.6 Role Permission Management

7.7 Differences Between Roles and Contacts

## 8. Use Cases

8.1 Text Customer Service

8.2 Regulatory Query Assistant

8.3 Product Query Assistant

8.4 Internal Knowledge Management

8.5 Professional Knowledge Management

8.6 Meeting Requirements Management

8.7 Financial Analysis Assistant

8.8 Credit Analysis Assistant

- 8.9 Voice Customer Service
- 8.10 IVR Customer Service Intent Recognition
- 8.11 Voice Call Summary
- 8.12 Voice Call Quality Inspection
- 8.13 Image and Vision
- 8.14 Invoice Recognition
- 8.15 Official Document Scanning
- 8.16 Business Card Scanning
- 8.17 External Data Integration
- 8.18 Agricultural Data Query

## 9. MaiAgent AI Assistant

- 9.1 Scan QR Code for Real-time Interaction

## 10. Others

- 10.1 Usage Calculation

# Registration and Login

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## Register an Account

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Please contact us via email and provide the following information:

Company Information:  
Tax ID Number:  
Name:  
Contact Phone:  
LINE ID (optional, for easier communication):

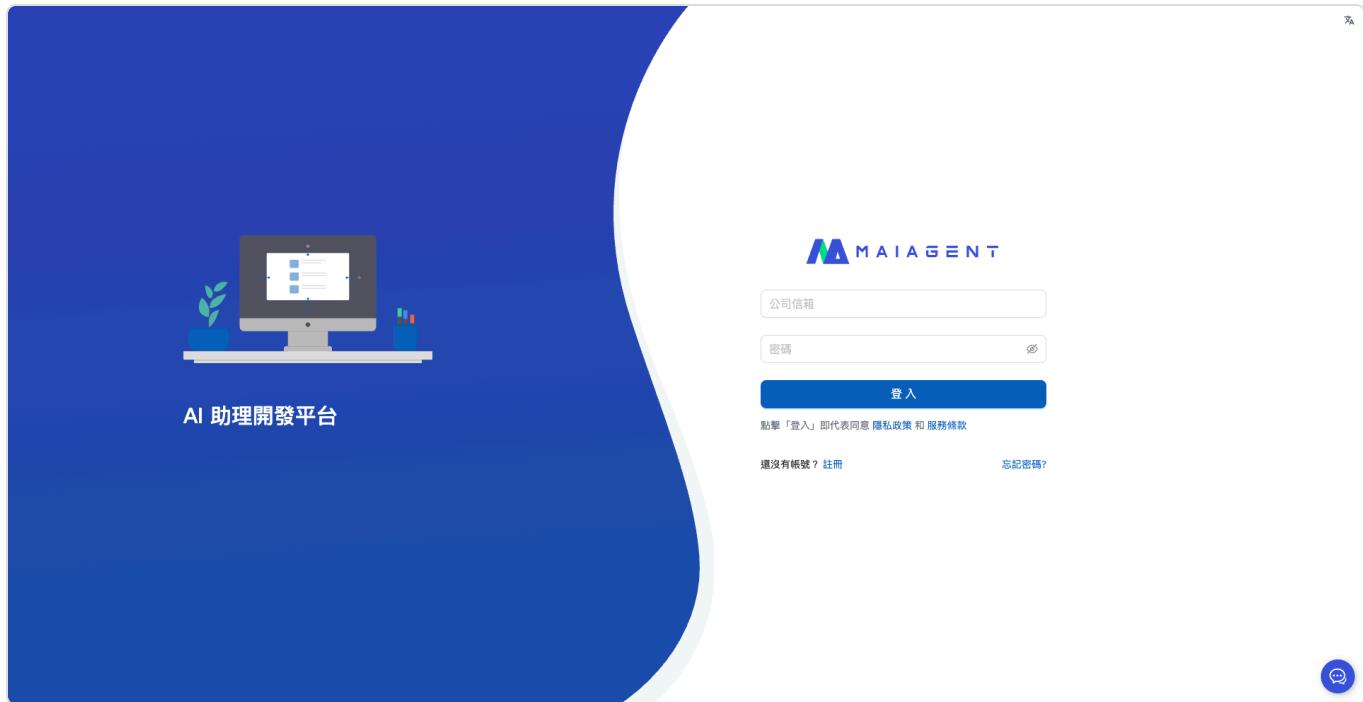
Send the information to [sales@maiagent.ai](mailto:sales@maiagent.ai) 😊

# How to Log in to the Platform

If you already have an account and password, please visit the MaiAgent AI Assistant Platform login page:

<https://admin.maiagent.ai/login>

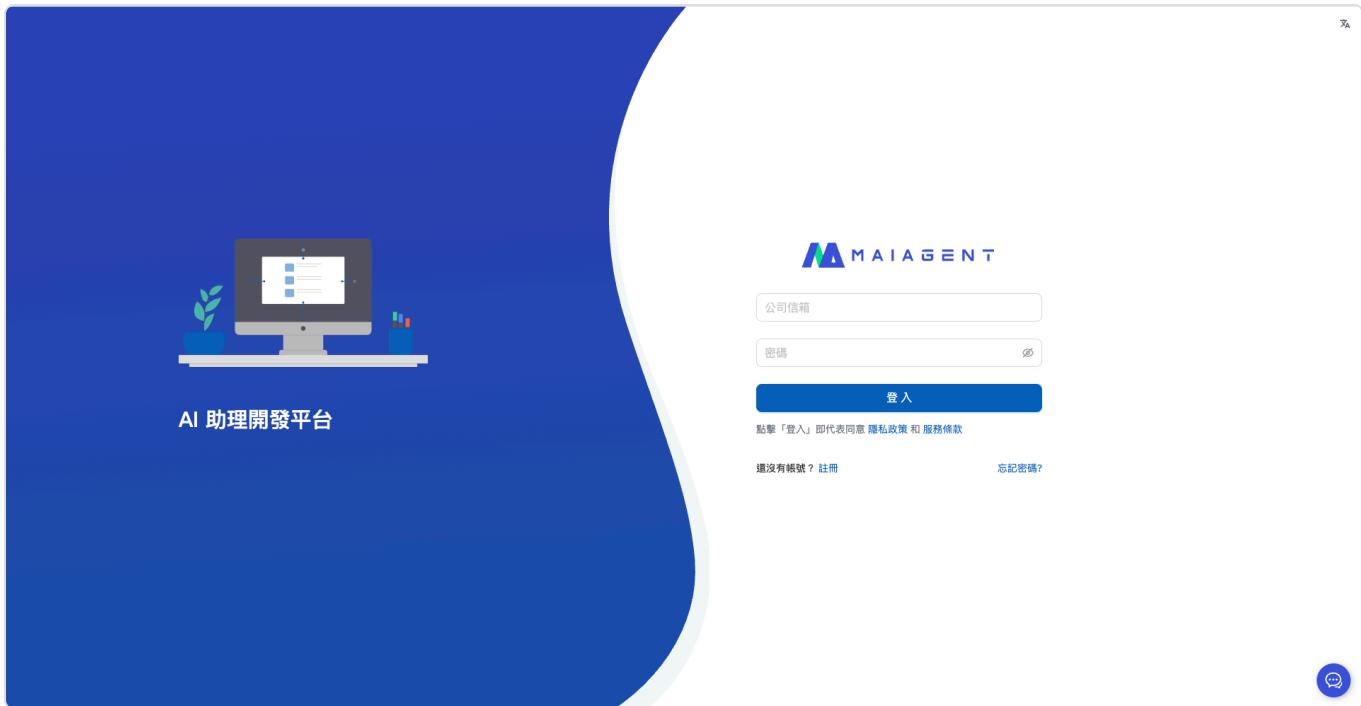
Enter your account and password to log in and start using the platform.



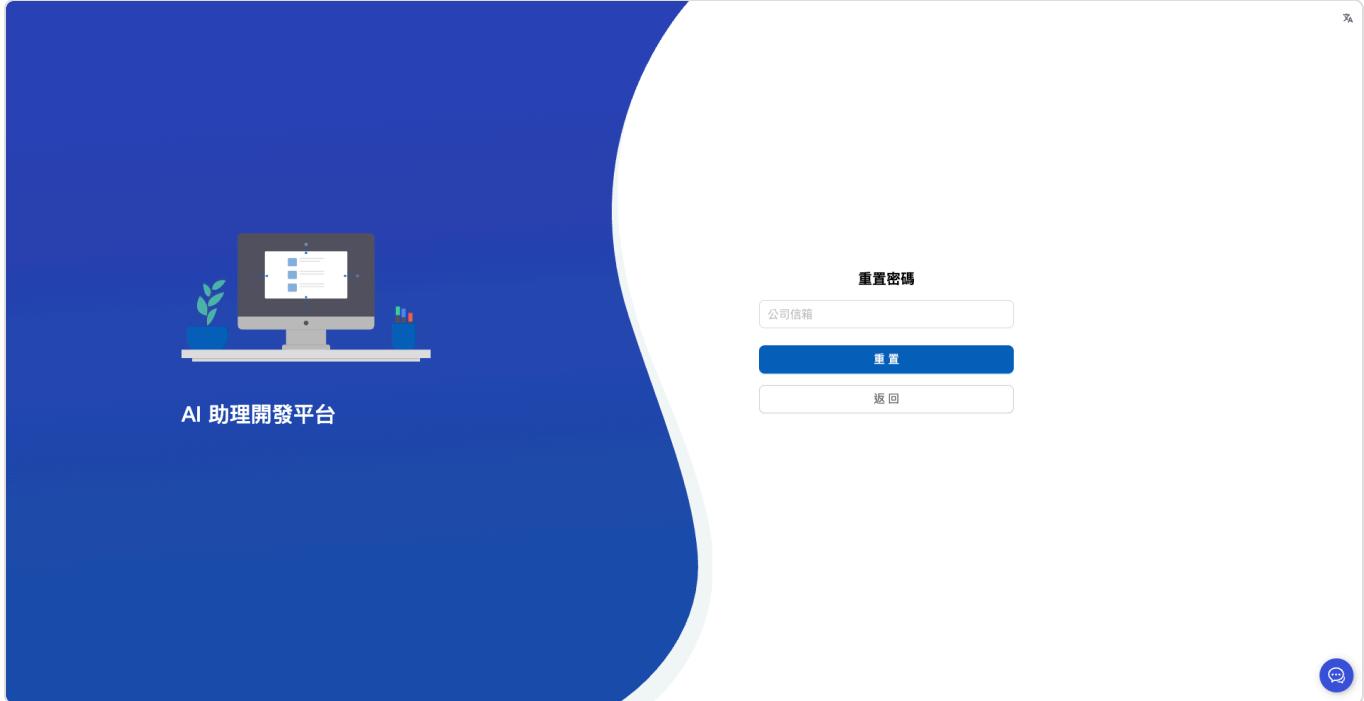
# Forgot Password

If you forget your login password, please click "[Forgot Password?](#)" to reset it.

## 1. Click the Forget Password Button



## 2. Enter Your Registered Email



### 3. Check Your Email for the Password Reset Message and Click the "Reset Password" Button

重置您的 MaiAgent 帳戶密碼 收件匣 ×

◆ 總結這封電子郵件

no-reply@maiagent.ai 寄給 我 上午11:37 (1 分鐘前) ☆ ← ⋮

**密碼重置請求**

親愛的 王小明  
我們收到了重置您帳戶密碼的請求。  
如果這是您本人操作，請點擊下方按鈕重置密碼：

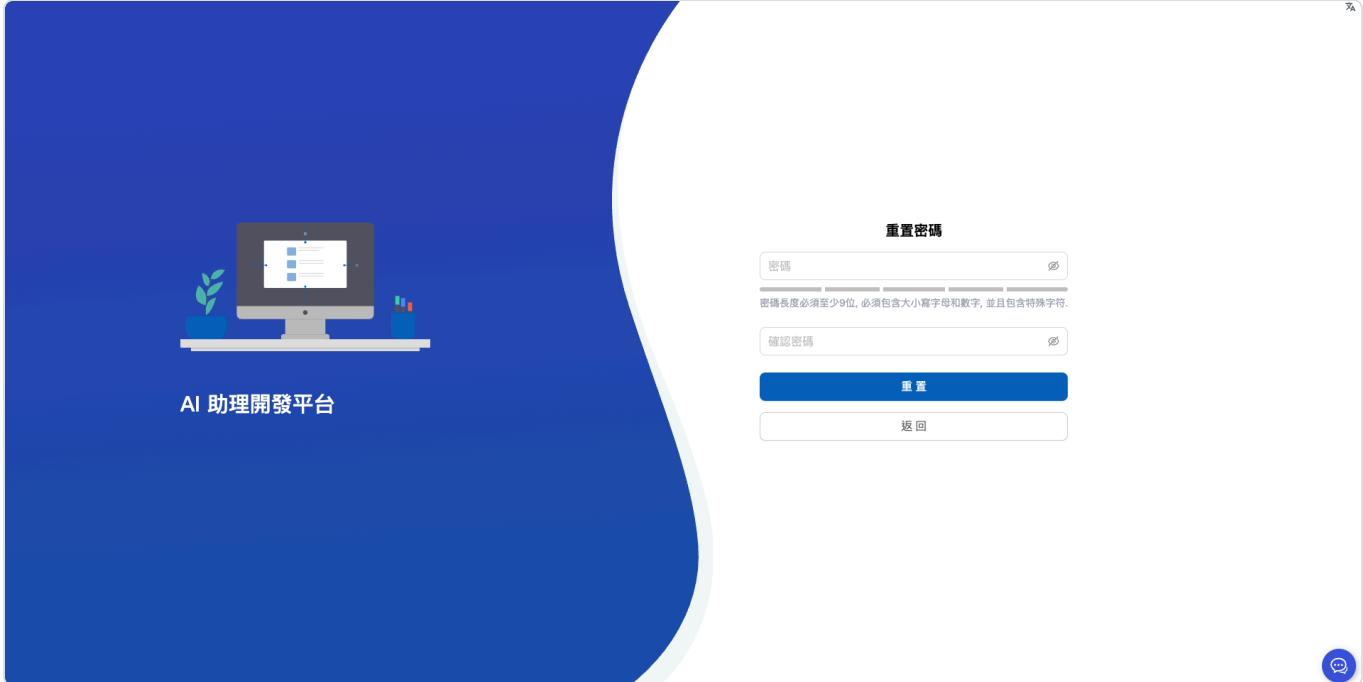
**重置密碼**

此連結將在 10 分鐘後失效。  
如果您沒有請求重置密碼，請忽略此郵件，您的帳戶將保持安全。  
謝謝！  
MaiAgent 團隊

此郵件是自動發送的，請勿直接回覆。

**MAIAGENT**  
碼資訊有限公司 | Playma Co., Ltd.  
統編：83709727  
地址：104 台北市中山區復興北路48號7樓  
網址：<https://maiagent.ai/>

### 4. Set Your New Password



## Build Your Custom AI Assistant

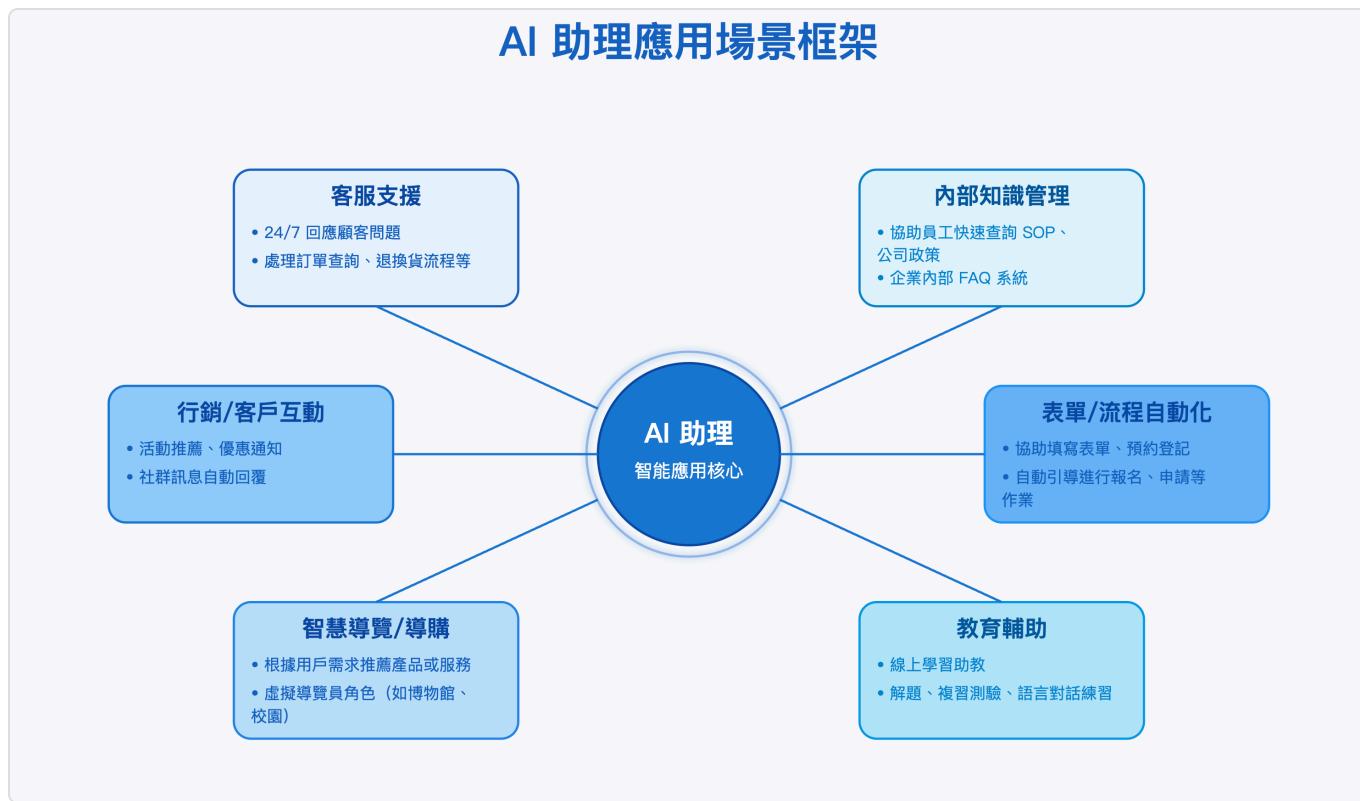
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# AI Assistant Features

## Purpose and Applications of AI Assistants

AI assistants can be widely applied across diverse industries and use cases, helping enterprises automate repetitive tasks and enhance operational efficiency, allowing teams to focus on high-value work and core competency development.

Below are common examples of AI assistant applications in enterprise workflows:



AI assistants can be applied across various industries, leveraging intelligent automation and real-time interaction advantages to help enterprises optimize processes, improve service quality, and enhance user experience. The following table lists common AI assistant application scenarios across different industries for reference.

Industry	Application Scenarios
E-commerce & Retail	Intelligent customer service, shopping recommendations, return processing
Finance & Insurance	Policy consultation, financial recommendations, risk Q&A
Education	Course assistance, learning diagnostics, language practice

Industry	Application Scenarios
Healthcare	Health consultation, appointment scheduling, patient education support
Government	Public service inquiries, policy Q&A, public feedback
Manufacturing	Internal knowledge management, maintenance operation guidance
Travel & Tourism	Itinerary recommendations, tour guidance, real-time Q&A support

## Four Stages of MaiAgent AI Assistant Setup

The setup process for MaiAgent AI assistants can be divided into four major stages. Below is a brief explanation of the objectives and functions of each stage. Complete operational procedures will be introduced in detail in the following chapters.

### 1. Create a New AI Assistant

Customize AI assistants according to your needs by selecting appropriate language models, configuring RAG (Retrieval-Augmented Generation) sources, and defining the AI assistant's role and task positioning to create intelligent assistants that fit enterprise scenarios.

### 2. Provide Reference Materials for AI Assistant

Establish a comprehensive knowledge foundation for the AI assistant by setting up knowledge bases, creating FAQ sections, or importing web crawler data sources to further enhance the accuracy and practicality of responses.

### 3. Launch the AI Assistant

Decide whether to make the AI assistant publicly available or limit it to internal use only. If choosing public availability, it can be integrated through company website embedding, LINE, Messenger, or other channels, flexibly integrating into existing platforms.

### 4. Track AI Assistant Performance

Utilize all conversations, response quality, webhooks, and usage analytics features to track performance, serving as a basis for continuous optimization and experience enhancement of the AI assistant.

# AI 助理設定流程圖

1 建立新的 AI 助理

2 提供 AI 助理參考資料

3 讓 AI 助理正式上線

4 追蹤 AI 助理運作成效

基本設定

設定知識庫

選擇串接對話平台

所有對話

RAG 設定

FAQ 常見問題

對外 網站 LINE Messenger

回覆品質控管

回答模式設定

爬蟲

對內 內部問答

Webhook

權限設定

設定前台呈現 (限網站)

使用分析

嵌入網站、成功上線

Before starting to create an AI assistant, consider reading a few helpful articles!

 [How to Choose an LLM Large Language Model?](#)

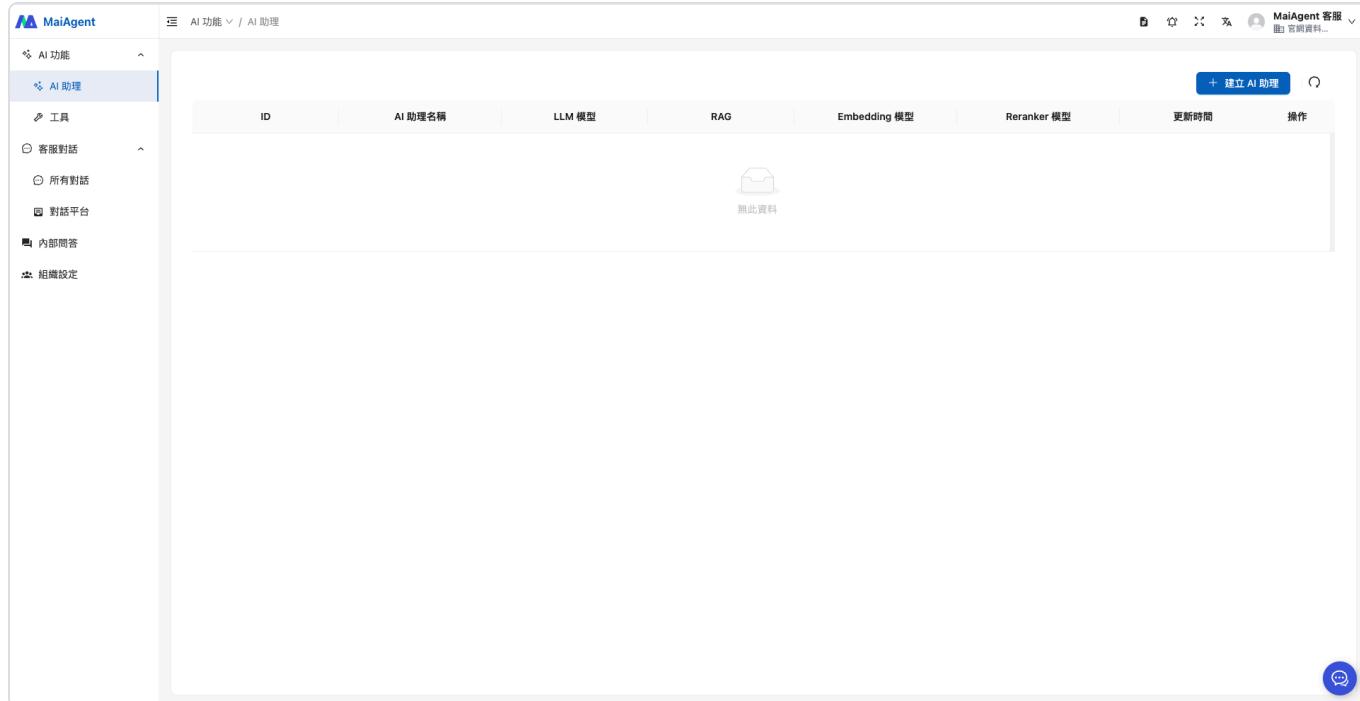
 [What is RAG \(Retrieval-Augmented Generation\)?](#)

 [What are System Prompts?](#)

# Create an AI Assistant

## 1. Create an AI Agent

Navigate to "AI Features" in the left sidebar menu, then "AI Agents", and click "+ Create AI Agent" in the upper right corner.



## 2. Name Your AI Agent

Select the "Basic Settings" tab, and in the "AI Agent Name" field, enter the name for your AI agent. You can name it according to the agent's primary task, such as XX AI Customer Service, XX Regulatory Query Assistant, XX Project Smart Assistant.

One account can create multiple AI agents (subject to quantity limitations based on the purchased plan).



### 3. Select RAG to Make Your AI Agent Smarter and More Accurate

#### What is RAG

You can think of RAG as a combination of "a conversational assistant + a librarian who excels at finding information."

A typical AI agent is like a person with excellent memory who is great at storytelling, but can only share knowledge they've learned before. However, when an AI agent is equipped with RAG technology, it's as if this assistant **goes to the library to find the latest information** before answering questions, then organizes the found content in their own words and clearly responds to you.

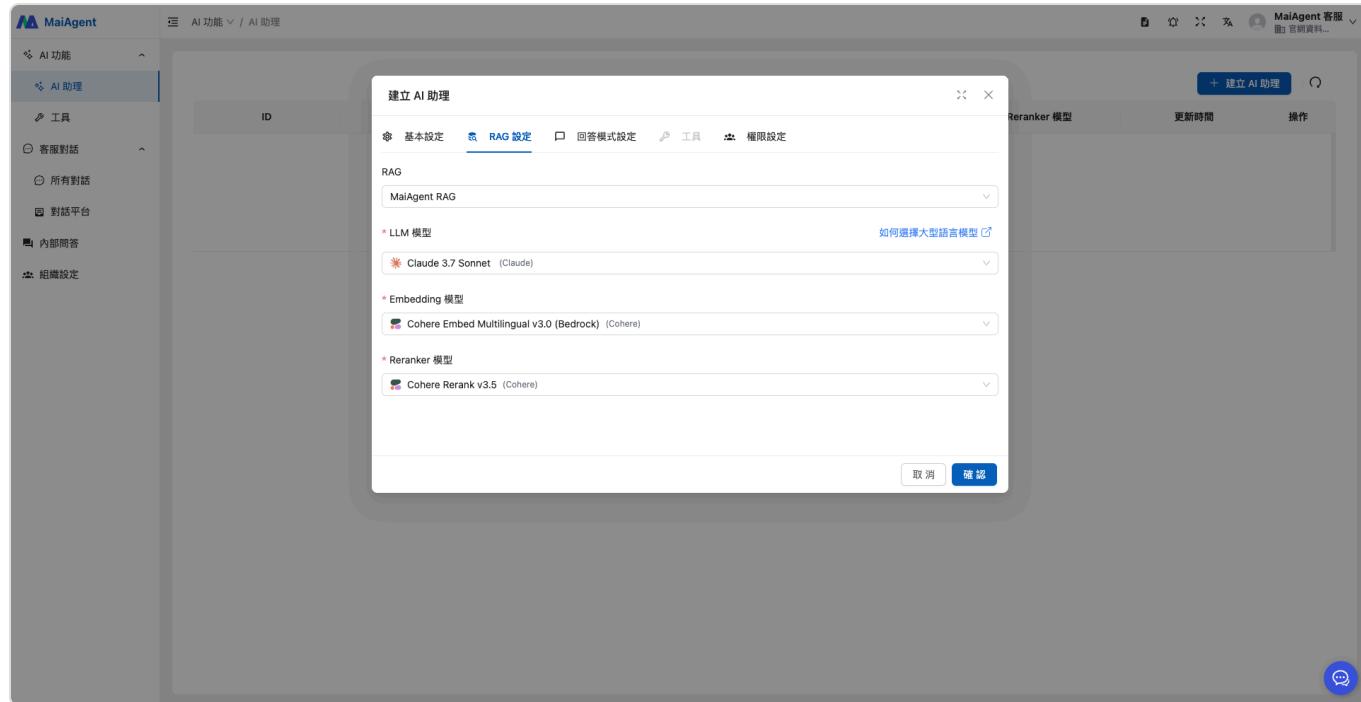
In the MaiAgent platform, this "library" is our **knowledge base**. The AI agent uses RAG technology to find relevant information from the knowledge base, making responses more accurate, timely, and tailored to needs.

The knowledge base setup method will be explained in detail in the next section.

MaiAgent RAG includes not only the RAG technology mentioned at the OpenAI Developer Conference, but also combines various classic NLP algorithms with proprietary retrieval technologies. Comparing internal datasets with OpenAI RAG response accuracy, both can achieve 95% response precision.

#### RAG Configuration Method

Select the "**RAG Settings**" tab, and in the "**RAG**" dropdown menu, choose different RAG (Retrieval-Augmented Generation) options. If there are no special requirements, **the default is MaiAgent RAG**.



Compared to OpenAI RAG, MaiAgent RAG provides more additional features, can flexibly apply to different deployment needs, handle more diverse data processing formats, and provide a more powerful retrieval and generation experience. For a detailed comparison, please see [What is RAG? Comparison Table of Maiagent RAG and OpenAI RAG](#)

## 4. Select a Model to Give Your AI Agent a Smart Brain!

### Purpose of Language Model Selection

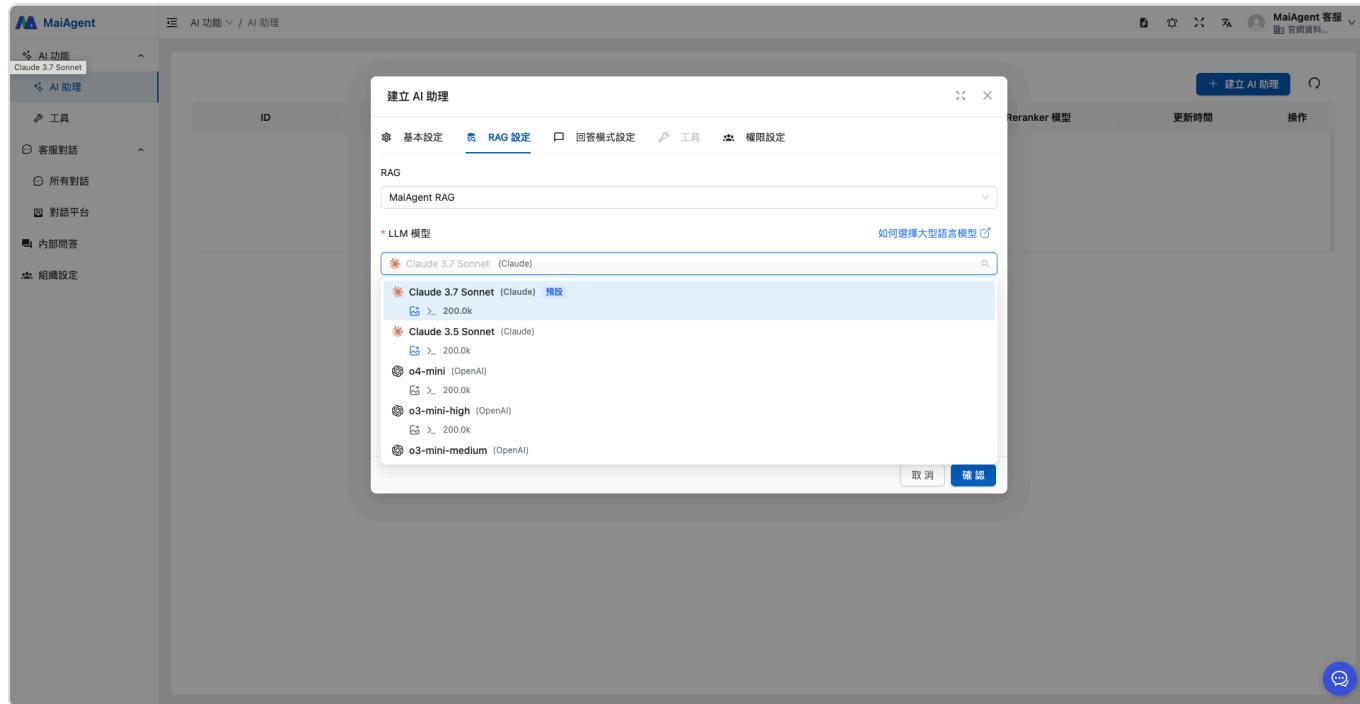
Each AI agent's performance largely depends on its brain—the language model (LLM) it uses. In this step, you can choose different types of models according to your needs, which will affect response speed, comprehension ability, and the depth and naturalness of answers.

Choosing the right model is like enabling high-efficiency mode for your AI agent, creating the best experience tailored to your application scenario!

#### Key Factors When Selecting a Large Language Model

### Language Model Configuration Method

Select the "**RAG Settings**" tab, and in the "**LLM Model**" dropdown menu, you can choose different large language models. If there are no special requirements, **the default is Claude 4.5 Sonnet**.



## 5. Create Role Instructions for Application Scenarios

To make your AI agent better suited to different application needs, you can set "role instructions" to make the AI's response style and content more aligned with the scenario context.

[What are Role Instructions? Role Instruction Template Examples? AI Tool for Generating Role Assistants](#)

### Hallucination-Free Generative AI Response Mechanism

MaiAgent's "hallucination-free generative AI response mechanism" ensures that AI maintains high accuracy when answering questions. When facing uncertain questions or questions beyond its knowledge scope, it will honestly express its limitations rather than generating fictitious answers, providing users with a more reliable and trustworthy AI interaction experience. The importance for various industries and public sector applications is explained below:

#### Industry Applications

##### Financial Industry:

When handling investment advice and risk assessment, AI must provide analysis based on actual data, avoiding generating false information that could lead to incorrect investment decisions. When

information is insufficient or uncertain, the system will clearly state this, ensuring the reliability of investment decisions.

### **Healthcare Industry:**

When assisting with medical diagnosis and medication consultation, AI systems must strictly follow known medical knowledge and cannot generate advice that might mislead patients. For novel or unverified medical information, the system will clearly indicate the need for further professional consultation.

### **Manufacturing Industry:**

In production process optimization and quality control applications, AI must provide recommendations based on actual production data and verified methods, avoiding production losses due to inaccurate predictions.

### **Education Industry:**

When assisting with teaching and answering student questions, AI needs to provide accurate knowledge rather than incorrect information that might mislead learning. For complex or ambiguous concepts, the system will acknowledge its understanding limitations.

### **Legal Industry:**

When providing legal information and advice, AI must be based on existing laws and precedents rather than providing speculative advice with potential legal risks. The system will clearly indicate matters that require further confirmation from professional lawyers.

### **Customer Service Consultation:**

When handling customer inquiries, AI must provide accurate product information and service descriptions. For questions that cannot be determined, it will immediately refer to relevant professionals to avoid misleading customers.

### **Public Sector Applications**

### **Government Policy Consultation:**

When providing citizens with policy information and service guidance, AI must respond based on the latest and correct regulations and administrative procedures, avoiding outdated or incorrect information. When encountering complex questions requiring professional judgment, the system will clearly suggest citizens seek assistance from relevant departments.

### **Public Service Decision-Making:**

When assisting government in evaluating public infrastructure, social welfare, and other decisions, AI must analyze based on real data and research, clearly stating uncertainties in predictions to ensure

policy-making reliability.

## Emergency Response Management:

When handling natural disasters, public health emergencies, etc., AI systems must provide accurate information and guidance, and cannot generate false information that might mislead the public and affect disaster prevention and response effectiveness.

## Choose the Appropriate Response Mode to Create Instructions

Select the "Response Mode" tab, ranging from free conversation to highly structured responses, meeting various business needs. Each mode has its own characteristics and applicable scope, allowing you to flexibly choose based on actual usage scenarios.



Response Mode: General

## Applicable Scenarios

Answer questions freely based on context and knowledge base content. Suitable for most Q&A scenarios.

## Operation Process

Select the "Response Mode Settings" tab, choose "General (Default)" as the response mode, and in the "Role Instructions" field, enter the role instructions you've defined for the AI agent. For output format, you can choose to output plain text or JSON format.



## Application Scenario: Website Customer Service Assistant

If you want to create a website customer service assistant for "MaiAgent - AI Agent Development Platform," you can enter AI response settings in the "Role Instructions" field, clearly defining its response style and scope of responsibilities.

**Role Instructions:**

```

你是「MaiAgent - AI助理開發平台」的網站客服助理，

- 請根據使用者語言回答，中文使用繁體中文
- 配合圖片去說明問題
- 補有名稱加粗顯示
- 數字使用半形 - 符號使用全形
- 如使用者要求下載文件，請直接提供連結
- 如果有人留電話要我們回覆，或詢問我們的電話，請用下方<example>內的文字回答
- 根據知識庫回答客戶問題，若無法回答請回覆「不好意思，目前我無法回答您的問題。請 Email 到 sales@maagenta.ai，將有專人為您服務」

<example>
謝謝您的訊息！請您 E-mail 您的聯絡資訊到
sales@maagenta.ai :
-姓名
-公司名稱
-連絡電話
我們將儘快與您聯繫。
</example>
```

\* 輸出格式  
 輸出純文字  輸出 JSON 格式

儲存

### Response Mode: Template

When you select "**Response Mode: Template**," the probability of your AI agent's hallucinated responses will drop to zero, because the AI agent will strictly respond to questions according to the knowledge base

and FAQ reply content you've created, switching to a classification-based response principle rather than asking LLM to generate content. Use the template system to generate responses, guaranteeing 100% hallucination-free.

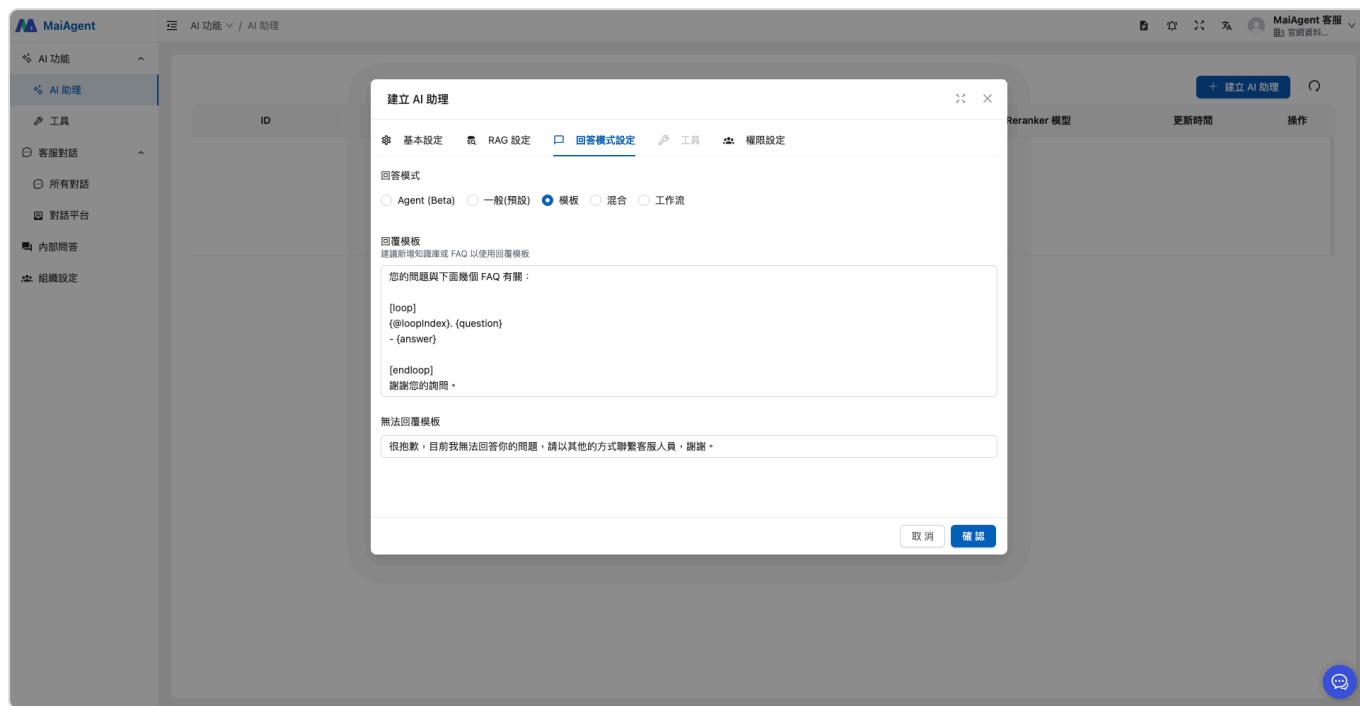
## Applicable Scenarios

Situations requiring unified answer formats, such as standard consultation processes, reports, etc.

## Case Operation

Suppose you want to create a "Tainan City Government 1999" customer service AI agent to respond to citizens' city government-related questions in real-time.

### 1. Select the "**Response Mode Settings**" tab, and choose "**Template**" as the response mode



### 2. Fill in the Response Template (use the template system to generate responses)

If you haven't created a knowledge base and FAQ yet, the default instruction content for the response template is as follows.

It is recommended that you first create and add a knowledge base or FAQ to use the response template, and the format **must be tabular file types such as Excel, CSV, json, jsonl**.

回覆模板  
建議新增知識庫或 FAQ 以使用回覆模板

[ 初始化回覆模板]

您的問題與下面幾個 FAQ 有關：

```
[loop]
{@loopIndex}. {question}
- {answer}

[loopend]
謝謝您的詢問。
```

In this scenario example, I have an AI agent "Tainan City Government 1999," and I've added "Tainan 1999 FAQ" to the knowledge base.

The fields in the FAQ include question, answer, department, category, and publication date.

It is recommended that you upload **Excel, CSV, json, jsonl** and other tabular file formats, and the fields must have **titles and corresponding content**.

	A 問題	B 答案	C 機關	D 分類	E 發布時間
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					

Now we return to editing the response template and click the "**Initialize Response Template**" button in the upper right corner. You will see the system generate a response example based on the document you just uploaded to the knowledge base.

回覆模板  
建議新增知識庫或 FAQ 以使用回覆模板

[ 初始化回覆模板]

你的問題與以下資料相關:

```
[loop: 台南1999 FAQ.xlsx]
{@loopIndex}. 問題: {問題} 答案: {答案} 機關: {機關} 分類: {分類} 發布時間: {發布時間}
[loopend]

謝謝您的詢問。
```

Now you can edit and format the response text portion.

The [] {} parts are system instructions, so just handle the text portions.

💡 Loop: Fill in the corresponding document filename (specify which document to use for response generation)

I modified the following parts:

- [x] "Opening greeting" content
- [x] "Question" content
- [x] "Category" content
- [x] Removed "Department"
- [x] Closing greeting content
- [x] Line break formatting

回覆模板  
建議新增知識庫或 FAQ 以使用回覆模板

感謝市民提出的問題，根據我的查詢，您的問題與下方資料相關

```
[loop: 台南 1999 FAQ.xlsx]
{@loopIndex}.
您詢問的問題 {問題}
答案: {答案}
所屬分類: {分類}
發布時間: {發布時間}
[endloop]
```

謝謝您的詢問，希望可以解決您的問題。

When we return to the AI agent Q&A interface and ask related questions, the AI agent's responses will completely follow the **template format** and **FAQ document content** we just edited.



2025/04/23 12:24:36

什麼是農地重劃？

2025/04/23 12:31:22



台南市政 1999

已使用知識庫

感謝市民提出的問題，根據我的查詢，您的問題與下方資料相關

1.

您詢問的問題: 什麼是農地重劃？

答案: 農地重劃係指將一定區域內不合經濟利用的農地加以重新整理，予以交換分合，劃分整理成一定標準區塊，並同時配合興修水利，改良灌溉排水、配置農水路，使每一區塊農地均能直接臨路、直接灌溉及直接排水，以改善生產環境，達到增進農地利用的一種土地改良方式。

所屬分類: 地政

發布時間: 2024-11-13T00:00:00

謝謝您的詢問，希望可以解決您的問題。

“ 引用

台南 1999 FAQ.xlsx

引用節點

2025/04/23 12:31:28

社宅的租期限制

2025/04/23 12:32:19



台南市政 1999

已使用知識庫

感謝市民提出的問題，根據我的查詢，您的問題與下方資料相關

1.

您詢問的問題: 社宅的租期限制？

答案: 租賃契約之期限最長為三年，承租人於租賃期限屆滿時仍符合承租資格者，得申請續租，租賃及續租期限合計最長不得超過六年。但符合住宅法第四條規定者，租賃期限得延長為十二年。

所屬分類: 社會住宅

發布時間: 2024-11-05T00:00:00

謝謝您的詢問，希望可以解決您的問題。

“ 引用



請輸入您想問的問題



Powered by MAIA GENT

### 3. Fill in the Unable to Respond Template

If the AI agent determines there is no relevant information, it will respond according to the "**Unable to Respond Template**".

Finally, click the "**Save**" button.



Response Mode: Hybrid

## Applicable Scenarios

Combines general responses with templates, using template format for some content while freely responding to others. Suitable for situations requiring partially structured responses.

## Operation Recommendations

At this point, the role instruction content may conflict with "Response Mode: Template," so when selecting "Response Mode: Hybrid," it is recommended to rewrite the role instructions with general principle-based content.

For example, the role instruction's tasks, interaction principles, communication attitude, etc.

The screenshot shows the MaiAgent AI Assistant interface. The left sidebar has a tree view with categories like AI功能, AI助理, 工具, 客服對話, 所有對話, 對話平台, 內部問答, and 規範設定. The main area has tabs at the top: 基本 (selected), 知識庫 (尾蟲 Beta), RAG 設定, 回答模式設定 (highlighted in blue), 工具, and 權限設定. Under '回答模式設定', there are radio buttons for Agent (Beta), 一般(預設), 模板, 混合 (selected), and 工作流. Below this is a section for '角色指令' with examples and a link to '如何撰寫角色指令'. A large text area shows a template for generating responses based on knowledge base data. At the bottom right are '儲存' and a blue circular button with a white speech bubble icon.

Response Mode: Workflow

## Applicable Scenarios

Suitable for specific work task scenarios, such as knowledge management, data summarization, project planning.

## Operation Process

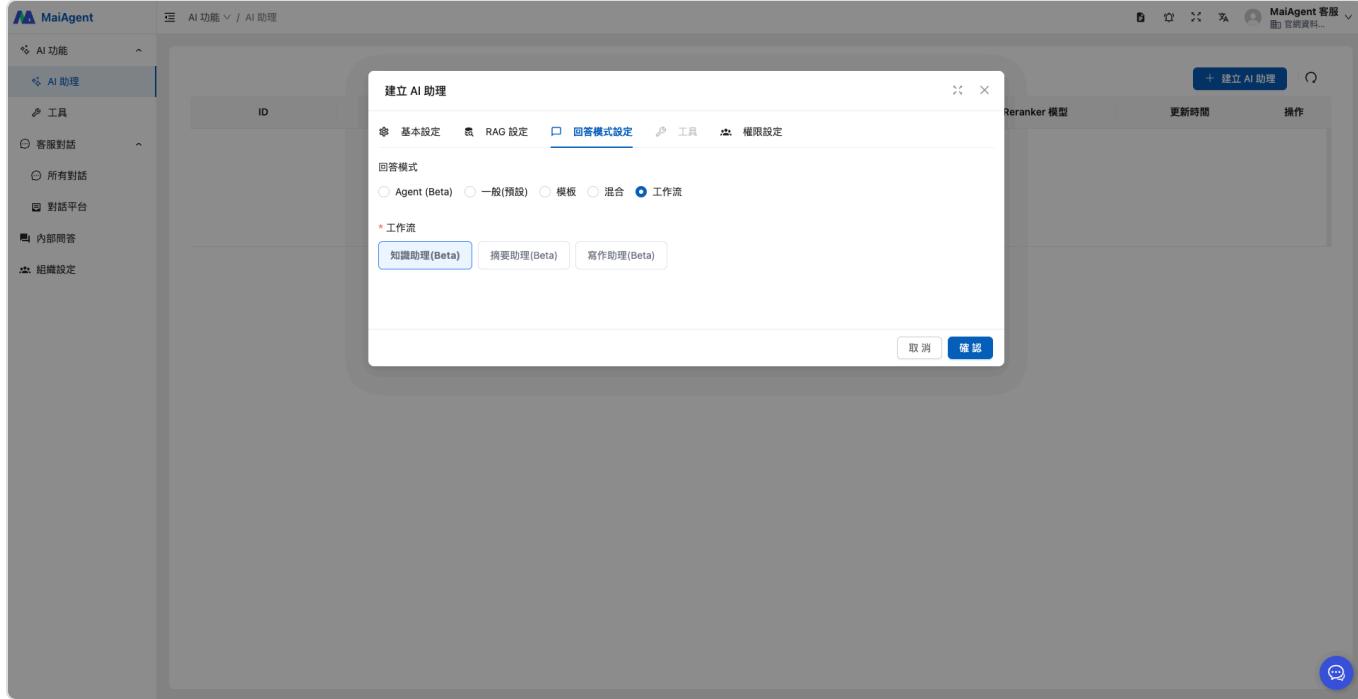
Please navigate to the "Response Mode Settings" tab and select "**Workflow**" as the response mode. This mode is suitable for task-oriented application scenarios, such as:

**Knowledge Management:** Assist in consolidating, retrieving, or maintaining internal knowledge data

**Information Summarization:** Quickly organize document highlights or meeting minutes

**Project Writing:** Assist in brainstorming ideas, drafting proposal drafts, etc.

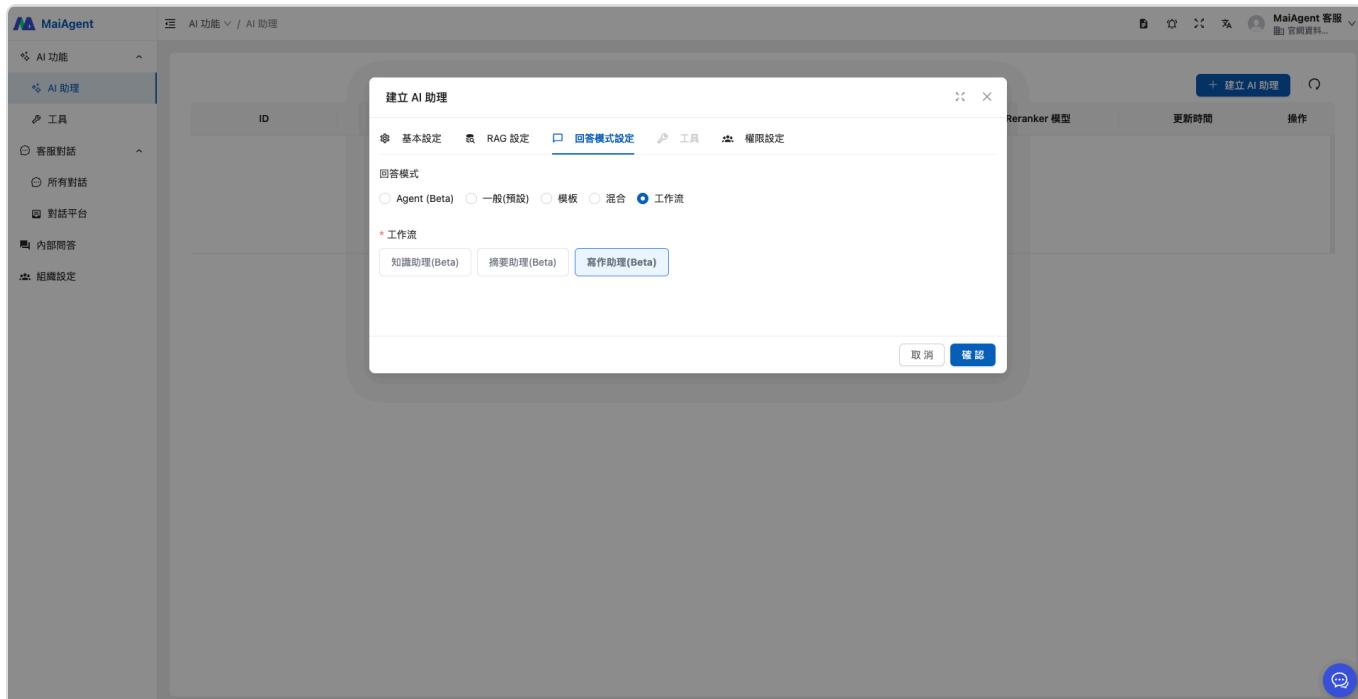
Please select the corresponding workflow module according to actual business needs, allowing the AI agent to maximize its effectiveness in specific tasks.



## Application Scenario: Copywriting Assistant

Suppose you are a marketing person at a food company, writing promotional copy for a newly launched healthy snack.

First, you can select "Writing Assistant" in "Workflow."



Next, you can go to the AI agent Q&A interface to submit your writing requirements. The AI agent will guide you step by step to fill in the key information needed for writing copy, such as:

Copy theme

Writing style

Target audience

Copy word count

AI will generate copy options that meet the context and communication needs based on your settings, helping you quickly brainstorm ideas and improve writing efficiency.

The screenshot shows a mobile application interface for '寫作助理測試' (Copywriting Assistant Test). The header includes a menu icon, the title '寫作助理測試', and a more options icon. A message bubble from the AI says: '擬定一份宣傳健康零食的廣告文案' (Draft a promotional advertisement for healthy snacks) at 2025/04/23 12:57:38. The user's response is: '謝謝你的回覆！我們可以開始進一步了解你的偏好，以便更好地擬定這份宣傳養樂多的廣告文案。' (Thank you for your reply! We can start further了解 your preferences to better draft this Nescafe advertisement.) followed by '首先，請問你希望這篇廣告文案的主題是什麼？例如，是否想強調健康、口感、或是其他特點？' (First, please ask what theme you want this advertisement to have? For example, do you want to emphasize health, taste, or other features?). The AI's response at 2025/04/23 12:58:40 includes a summary: '主題強調健康兼具美味 風格幽默有趣 字數不超過兩百字' (Theme emphasizes health and taste, style is humorous and interesting, word count does not exceed 200 words). The user's response at 2025/04/23 12:58:51 is: '謝謝你的回覆！我們已經了解了你對於廣告文案的主題、風格和字數的偏好。接下來，我們想進一步了解你的其他偏好。' (Thank you for your reply! We have already understood your preferences for the advertisement's theme, style, and word count. Next, we want to further understand your other preferences.). The AI's response at 2025/04/23 12:59:29 is: '請問你希望這篇廣告文案使用哪種語言？例如，中文、英文或其他語言？此外，你對於目標受眾有什麼特定的想法嗎？例如，年齡層或性別？' (Please ask which language you want this advertisement to be in? For example, Chinese, English, or other languages? In addition, what specific ideas do you have for your target audience? For example, age group or gender?). The user's response at 2025/04/23 12:59:38 is: '中文，受眾為青壯年人' (Chinese, target audience is young adults). The AI's final message at 2025/04/23 12:59:48 is: '隨時可以結束偏好調查 開始寫作' (You can end the preference survey at any time and start writing). A text input field at the bottom says: '請輸入您想問的問題' (Please enter the question you want to ask).

## 獨特賣點：我們的產品如何改變你的飲食

想要改變飲食，卻又不想成為那個在派對上默默啃生菜的“健康怪人”？別擔心，我們的產品就像是你飲食中的超級英雄，讓你在享受美味的同時，還能輕鬆保持健康！想像一下，當你咬下那口香脆的健康零食，瞬間感受到的不是罪惡感，而是滿滿的幸福感，彷彿在嘴裡開了一場派對！

我們的產品不僅僅是食物，它們是你生活中的小助手，幫助你在忙碌的日常中，輕鬆攝取所需的營養。無論是工作間隙的小點心，還是健身後的能量補充，我們的美味選擇都能讓你在享受的同時，悄悄地為身體加分。想要擺脫那些無聊的飲食選擇？我們的產品就像是你的飲食魔法師，讓每一口都充滿驚喜！

所以，別再猶豫了，讓我們的產品成為你飲食的秘密武器，讓健康與美味攜手共舞，讓你在每一餐中都能感受到生活的樂趣！

### 產品介紹：健康又美味的選擇

在這個快節奏的生活中，健康與美味似乎總是難以兼得，但現在，這一切都將改變！想像一下，當你咬下那一口香脆的零食，卻不必擔心卡路里和添加劑的負擔，這就是我們最新推出的健康美味產品的魅力所在！

這款產品不僅選用天然食材，還經過精心調配，讓每一口都充滿驚喜。無論是香濃的堅果、清新的水果，還是富含纖維的穀物，這些成分不僅能滿足你的味蕾，還能為你的身體提供所需的營養。想要在工作間隙來一點小點心？這款產品絕對是你的最佳選擇，讓你在享受美味的同時，還能保持活力滿滿！

而且，這款產品的包裝設計時尚又便攜，無論是在辦公室、健身房，還是戶外野餐，都能輕鬆攜帶，隨時隨地享受健康美味。別再猶豫了，讓我們一起告別那些無趣的零食，迎接這款健康又美味的選擇，讓生活更加多姿多彩！

### 用戶評價：真實的改變

在這個快節奏的生活中，健康與美味似乎總是難以兼得，但現在，這一切都將改變！想像一下，當你品嚐到一口香濃的健康零食，嘴裡的美味讓你忍不住想要再來一口，而心裡卻知道這是對身體的最佳選擇。這就是我們的秘密武器——全新推出的健康美味零食，讓你在享受美味的同時，還能輕鬆保持健康！

這款零食不僅低糖、低卡，還富含纖維和天然成分，讓你在享受美味的同時，無需擔心卡路里的負擔。想要在工作時提神？想要在運動後補充能量？這款零食都能滿足你的需求！而且，獨特的口味組合，讓每一口都像是在舌尖上跳舞，讓你忍不住想要分享給朋友。

許多用戶已經開始體驗這款零食帶來的真實改變，從體重管理到提升能量，無不讚不絕口。現在就加入這場健康美味的革命，讓你的生活從此不再平凡！

### 結尾：行動起來，享受健康美味

想要在健身房裡成為超級英雄，卻又不想放棄美食的快樂？別擔心，健康飲食不再是你心中的「禁忌之食」！

想像一下，當你咬下那口色香味俱全的藜麥沙拉，瞬間感覺自己像是吃了超能力，能量滿滿，連舉重都能輕



請輸入您想問的問題



Powered by MAIAGENT

Response Mode: Agent

### Applicable Scenarios

In daily enterprise operations, employees often need to organize data, conduct data analysis, and produce reports and analytical reports in response to routine business needs or tasks assigned by

supervisors. Common query questions include:

"Which product sold the most last month?"

"Please list all customers with sales exceeding 100,000"

"What is the revenue trend for the past three months?"

If these types of questions are handled by non-technical personnel, they often need to rely on the data team to help write SQL query statements, making the process time-consuming and inefficient.

Now, through MaiAgent's Agent mode, the system can use the Text to SQL tool to automatically convert natural language questions into corresponding SQL syntax and query databases in real-time, quickly providing analysis results.

For an introduction to the Text to SQL feature, please refer to: [Text to SQL Feature](#)

This feature is particularly suitable for scenarios requiring **real-time queries and data insights**, such as report analysis, operational metric tracking, data queries, etc. It allows non-technical users to easily access data, achieving a more intuitive and efficient data-driven decision-making process.

## Text to SQL Operation Process

Navigate to the "Response Mode Settings" tab and select "**Agent**" as the response mode



Upload database content or select database URL

MaiAgent supports: MySQL PostgreSQL Oracle DB Microsoft SQL Server (MSSQL) The maiagent option applies Excel files you've already uploaded in the MaiAgent knowledge base

## Application Scenario: E-commerce Product Sales Data Query

Suppose you are a marketing person on an e-commerce platform who wants to quickly query product sales and other data.

First, in the "Response Mode Settings" tab, select "**"Agent"**" as the response mode



Next, you can choose to upload an Excel file to the knowledge base, and the system will automatically convert it to a queryable database format.

For a detailed introduction to using MaiAgent knowledge base for Text to SQL, please refer to: [Using MaiAgent Knowledge Base for Text to SQL](#)

	A	B	C	D	F	G	H	I	J	K	L	M	P	Q	R	S	T
1	銷售通路	日期	消費店櫃	定價金額	數量	商品名稱	尺寸名稱	顏色名稱	時間	收銀機	折扣數	報備折扣	含稅售價金額	金額小計	應收金額		
2	電商平台	2025/02/19	電商平台	269.	1	方點襪/酒紅	L	酒紅	16:27	1201	66%	正品	178	178	0		
3	電商平台	2025/02/19	電商平台	269.	1	細橫條紋/駝	L	駝色	16:27	1201	66%	正品	178	178	0		
4	電商平台	2025/02/19	電商平台	269.	1	暮色條紋襪/黑	L	黑	16:27	1201	66%	正品	178	178	0		
5	電商平台	2025/02/19	電商平台	269.	1	格子橫條	F	不分色	16:27	1201	66%	正品	178	178	0		
6	電商平台	2025/02/19	電商平台	269.	1	竹節紋襪/藍	L	藍	16:27	1201	65%	正品	176	176	0		
7	電商平台	2025/02/19	電商平台	120.	1	連貫+超商取付	M	無色	16:27	1201	100%	正品	120	120	1,008		
8	電商平台	2025/02/20	電商平台	269.	1	千葉紋襪/藍紫	L	紫	10:50	1201	74%	正品	200	200	0		
9	電商平台	2025/02/20	電商平台	269.	1	雙色水手條紋襪	F	酒紅	10:50	1201	74%	正品	200	200	0		
10	電商平台	2025/02/20	電商平台	269.	1	竹節紋襪/酒紅	L	酒紅	10:50	1201	74%	正品	200	200	0		
11	電商平台	2025/02/20	電商平台	269.	1	雨點條紋襪/海軍	L	海軍藍	10:50	1201	74%	正品	200	200	0		
12	電商平台	2025/02/20	電商平台	269.	1	幾何條紋襪/黑	L	黑	10:50	1201	74%	正品	199	199	999		
13	官網	2025/02/19	官網	269.	1	暮色條紋襪/米白	L	米白	12011	100%	未設定	269	269	0			
14	官網	2025/02/19	官網	269.	1	暮色條紋襪/黑	L	黑	12011	100%	未設定	269	269	0			
15	官網	2025/02/19	官網	269.	1	橫條紋襪/深藍	L	深藍	12011	100%	未設定	269	269	0			
16	官網	2025/02/19	官網	269.	1	橫盤格紋襪/深灰	L	灰	12011	100%	未設定	269	269	0			
17	官網	2025/02/19	官網	269.	1	橫盤格紋襪/米白	L	米白	12011	100%	未設定	269	269	0			
18	官網	2025/02/19	官網	269.	1	經典撞色羅紋襪	L	綠	12011	100%	未設定	269	269	0			
19	官網	2025/02/19	官網	269.	1	雙色橫條襪/白綠	L	綠	12011	100%	未設定	269	269	0			
20	官網	2025/02/19	官網	269.	1	雙色橫條襪/深灰	L	灰	12011	100%	未設定	269	269	0			
21	官網	2025/02/19	官網	269.	1	經典撞色羅紋襪	L	黑	12011	100%	未設定	269	269	0			
22	官網	2025/02/19	官網	320.	1	粗斜條紋襪/藍	F	藍	12011	100%	未設定	320	320	2,741			
23	官網	2025/02/19	官網	899.	1	麂皮清潔組	F	不分色	12011	100%	未設定	899	899	0			
24	官網	2025/02/19	官網	120.	1	連費	F	不分色	12011	100%	未設定	120	120	1,019			
25	官網	2025/02/19	官網	1,980.	1	2002開口拖鞋	M	橄欖綠	12011	100%	未設定	1,980	1,980	0			
26	官網	2025/02/19	官網	120.	1	連費	F	不分色	12011	100%	未設定	120	120	2,100			
27	官網	2025/02/19	官網	1,980.	1	2002開口拖奶茶	XS	奶茶棕	12011	93%	未設定	1,840	1,840	0			
28	官網	2025/02/19	官網	1,980.	1	2002開口拖鞋	M	橄欖綠	12011	93%	未設定	1,840	1,840	3,680			
29	官網	2025/02/19	官網	4,288.	1	5108集9.5	9.5	黑	12011	90%	未設定	3,874	3,874	3,874			
30	官網	2025/02/19	官網	1,980.	1	2001室內拖黑S	S	黑	12011	93%	未設定	1,840	1,840	0			
31	官網	2025/02/19	官網	1,980.	1	2001室內拖藍S	S	靛藍	12011	93%	未設定	1,840	1,840	3,680			
32	官網	2025/02/19	官網	1,980.	1	2001室內拖奶茶	L	奶茶棕	12011	100%	未設定	1,980	1,980	0			
33	官網	2025/02/19	官網	900.	1	連費	F	不分色	12011	100%	未設定	900	900	2,880			
34	官網	2025/02/19	官網	1,980.	1	2001室內拖黑S	S	黑	12011	93%	未設定	1,840	1,840	0			
35	官網	2025/02/19	官網	1,980.	1	2001室內拖藍S	S	靛藍	12011	93%	未設定	1,840	1,840	0			
36	官網	2025/02/19	官網	1,980.	1	2002開口拖鞋	M	橄欖綠	12011	100%	未設定	1,980	1,980	0			
37	官網	2025/02/19	官網	120.	1	連費	F	不分色	12011	100%	未設定	120	120	0			

You can also directly ask your company's technical staff to provide a MySQL or PostgreSQL connection string.

Here, assuming we've obtained a PostgreSQL connection string, please select PostgreSQL from the database URL dropdown menu, paste the connection string, and click save.

The screenshot shows the MaiAgent AI Assistant configuration interface. The left sidebar has sections for AI功能 (AI Functions), AI助理 (AI Assistant), 工具 (Tools), 客服對話 (Customer Service Chat), 所有對話 (All Conversations), 對話平台 (Conversation Platform), and 內部問答 (Internal Q&A). The main area has tabs for 基本 (Basic) and 知識庫 (Knowledge Base). Under Basic, there are sections for 基本設定 (Basic Settings), RAG 設定 (RAG Setting), 回答模式設定 (Response Mode Setting), 工具 (Tools), 權限設定 (Permission Setting), 回答模式 (Response Mode) (with Agent (Beta) selected), and 角色指令 (Role Instructions). A note says '請根據知識庫資料回答，若無法回答請回答『目前尚未有此資訊能回答您的問題』。' Below it, '範例1' and '範例2' show examples of responses. At the bottom, there's a 資料庫 URL input field with 'postgresql' selected, and a '儲存' (Save) button.

Once configured, you can go to the AI agent Q&A interface and enter a question, such as

"What are the top three items with the highest sales on the official website, excluding shipping fees"



官網銷售額最高的三個品項是什麼，排除運費

2025/04/23 14:58:43



電商營業額分析助手

根據查詢結果，官網銷售額最高的三個品項（排除運費）依序為：

1. 6201可可咖9：總銷售額為15,746元
2. 5107經典黑9：總銷售額為9,834元
3. 5208巧克力5.5：總銷售額為9,376元

這三項產品在官網的銷售表現最為突出，其中6201可可咖9的銷售額明顯領先其他品項。

2025/04/23 14:58:54



請輸入您想問的問題

Powered by  MAIA GENT

## 6. Pre-assign Agent Permissions

[RBAC-based Permission Management Architecture and Description](#)

Select the "**Permission Settings**" tab to configure which members should be pre-assigned access to the agent. The default is to select all and add to all roles, which can be modified according to usage scenarios.

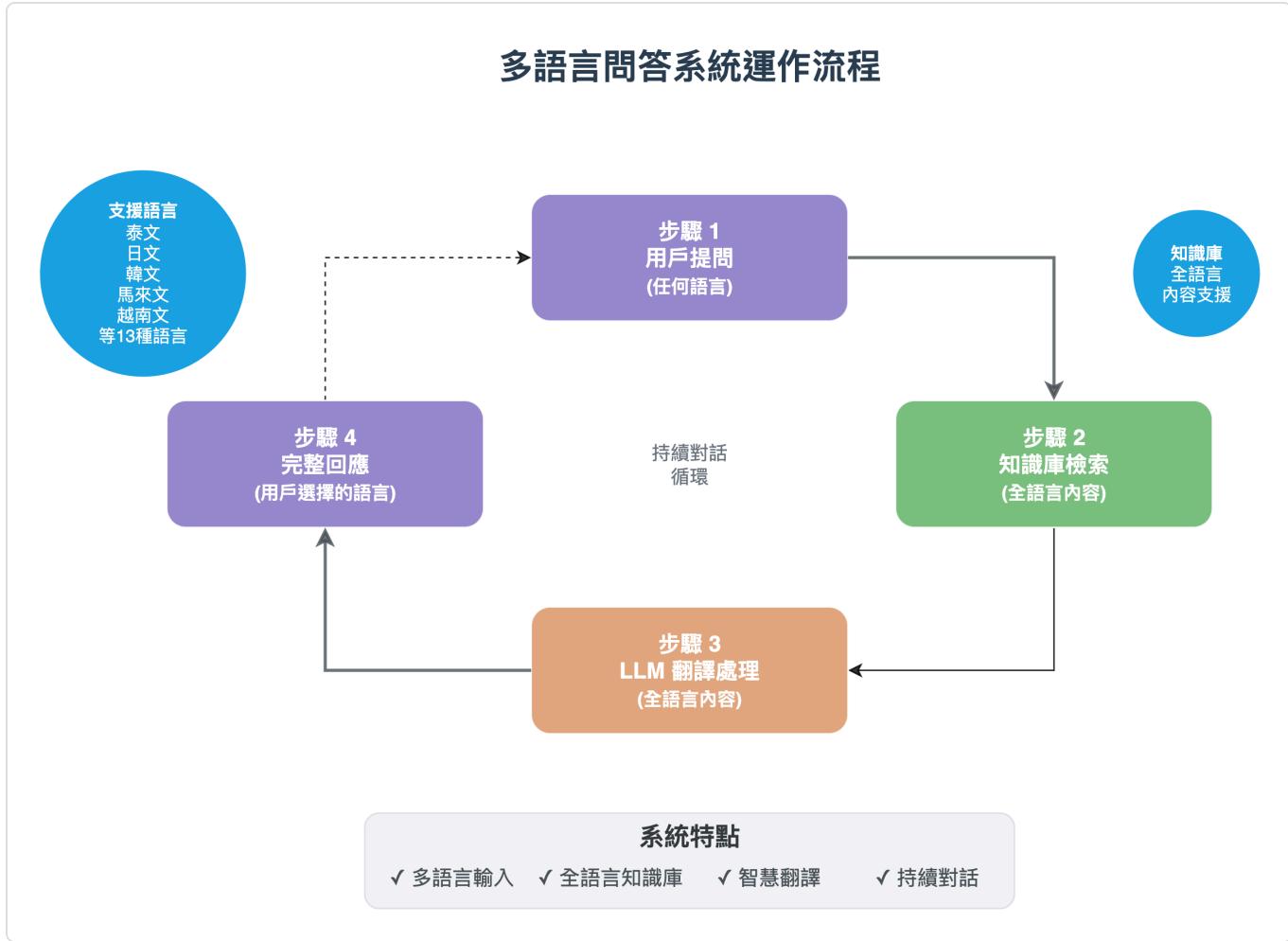


## 7. Complete Your AI Agent Creation

After completing the above steps, click the blue "**Confirm**" button in the lower right corner of the dialog box to finish the setup 🎉.

# Multi-language Support

MaiAgent provides multi-level language support: **Web Chat supports 13 language interfaces**, **Knowledge Base supports content processing in all languages**, **Management Console provides Chinese and English interfaces**, enabling your AI assistant to communicate naturally and fluently with global users, breaking down language barriers and expanding your business reach.



## Supported Languages

MaiAgent Web Chat currently supports the following 13 languages:

### Chinese Series

**Traditional Chinese** - zh-TW

**Simplified Chinese** - zh-CN

### International Languages

**English** - en

## Southeast Asian Languages

**Thai** - th

**Malay** - ms

**Vietnamese** - vi

**Indonesian** - id

**Filipino** - fil

**Burmese** - my

**Khmer** - km

**Lao** - lo

## East Asian Languages

**Japanese** - ja

**Korean** - ko

**Continuous Updates:** We will continue to add more language support based on user needs. If you require specific language support, please contact our technical team.

##  Language Configuration Methods

### 1. Configuration via JavaScript

Please refer to [Technical Manual—Web Chat](#)

### 2. Web Chat Conversation Settings

Configuration Steps:

Click  in the upper right corner of the window



## 2. Click Traditional Chinese

---

## 3. Select your desired language



## ## 🌎 Multi-language Features

### 1. Intelligent Language Detection and Response

**Automatic Recognition (Chinese/English):** Supports automatic recognition of Chinese and English, with the system responding in the corresponding language.

**Multi-language Configuration:** Supports multiple languages, with the option to switch and select display language in settings; once selected, conversations will respond in that language.

**High Accuracy:** Based on advanced NLP technology, language detection accuracy reaches 98%.

### 2. Natural Language Understanding

**Semantic Comprehension:** Not just translation, but true understanding of meaning across different languages

**Cultural Adaptation:** Considers expression habits from different cultural backgrounds

**Slang Recognition:** Capable of understanding common slang and colloquial expressions

### 3. Localized Responses

**Word Choice:** Uses terminology and expressions that conform to local habits

**Format Adjustment:** Adjusts date, number, and currency formats according to different languages

##  Knowledge Base and Interface Language Description

#### I. Interface Language Support Levels

**MaiAgent Management Console**

**Supports 3 interface languages: Traditional Chinese, Simplified Chinese, English**

**Applicable for system management and configuration operations**

**Web Chat Interface**

**Supports full display in 13 languages**

**Includes voice recognition and voice response functionality**

**Covers: Chinese (Traditional and Simplified), English, Thai, Japanese, Korean, Malay, Vietnamese, Indonesian, Filipino, Burmese, Khmer, Lao**

#### II. Knowledge Base Content Processing Capabilities

**Full-language Document Support**

**Knowledge Base can parse and process document content in any language**

**No document language restrictions, supports various global language formats**

**Intelligent retrieval function can accurately search within multilingual knowledge bases**

**Upload Steps:**

**Enter Knowledge Base Management**

**Select Add Document**

**Upload documents in any language (no language restrictions)**

**System automatically recognizes document language and creates multilingual indexes**

#### III. Cross-language Q&A Functionality

**Core Features**

**Multi-language Queries: Supports free questioning in 13 languages**

**Full-language Retrieval: Searches relevant content across complete multilingual knowledge base**

**Intelligent Translation: Automatically translates retrieval results into user's preferred language**

**Precise Responses: Ensures completeness and accuracy of answers**

## Workflow

**Receive Query** - User asks questions in any supported language (Thai, Japanese, Korean, etc.)

**Intelligent Retrieval** - System searches for most relevant content across languages

**Content Integration** - LLM analyzes and integrates multilingual data

**Language Conversion** - Translates into user's selected display language

**Output Answer** - Provides complete response

### ## Application Scenarios

#### 1. Southeast Asian Market Expansion

**Regional Coverage:** Supports 8 major Southeast Asian languages, covering over 600 million people

**Localized Services:** Understands cultural differences and business practices of each country

**Cross-border E-commerce:** Provides native language shopping experience for customers from different countries

#### 2. International Customer Service Center

**Global Support:** Covers customer service needs for major Asian markets

**24-hour Service:** Cross-timezone multilingual customer support

**Cultural Sensitivity:** Understands communication styles and polite expressions from different cultures

#### 3. Multinational Enterprise Internal Use

**Employee Support:** Provides internal Q&A services for multinational employees

**Knowledge Sharing:** Breaks down language barriers, promotes knowledge flow

**Training Assistance:** Multilingual training content and Q&A

#### 4. Tourism and Hospitality Industry

**Tourist Services:** Provides instant assistance to tourists from different countries

**Attraction Information:** Multilingual attraction information and guided tour services

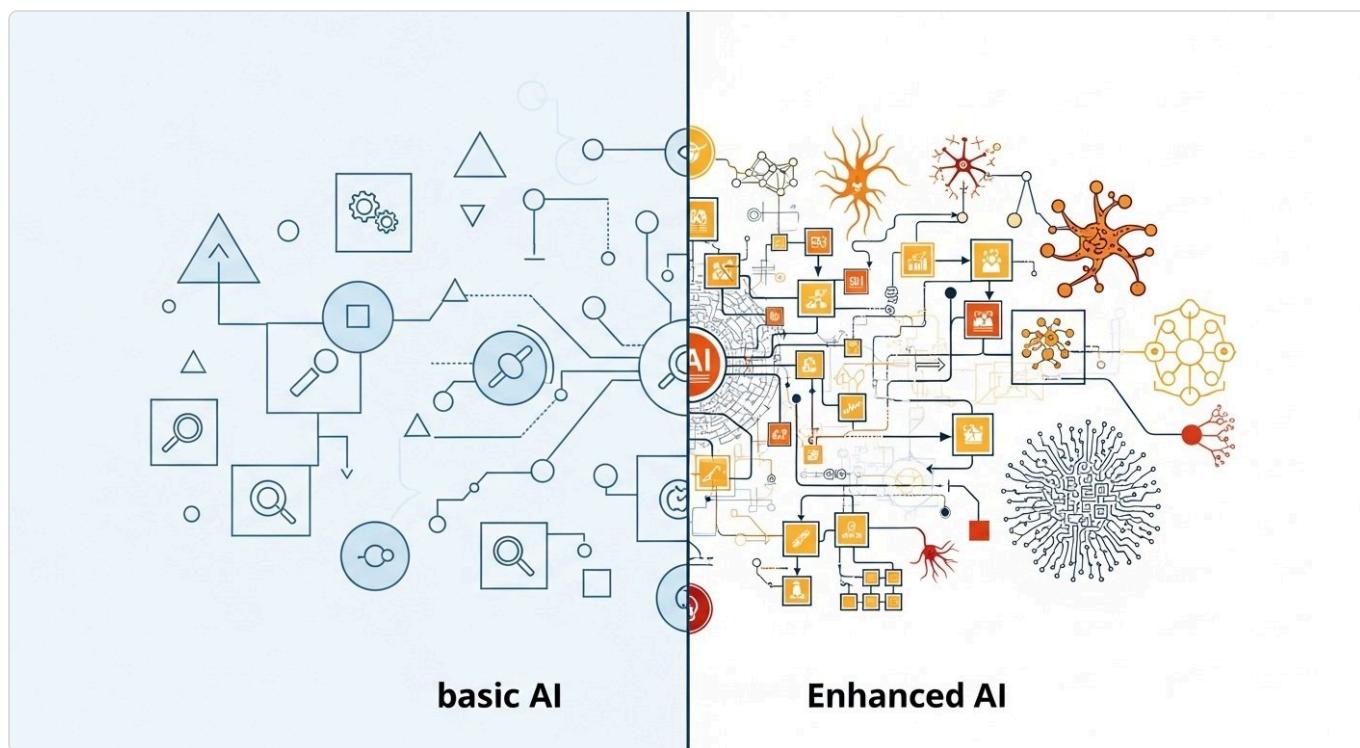
**Booking Services:** Supports multilingual reservation and inquiry services

# Role Instruction Design Guide

You can use the [AI tool for generating system prompts](#) created by MaiAgent to help you refine your system prompts

## 🎭 What is a "System Prompt"?

Imagine you're directing a movie and need to tell actors what role they're playing, their personality traits, and how they should speak. A **system prompt** is like a "script" for AI, telling it what kind of customer service representative to play.



## 📚 Technical Terms Glossary

Before we begin, let's familiarize ourselves with some important concepts:

### 🤖 AI Agent

**Analogy:** Like a virtual employee you hire

**Explanation:** An AI system capable of autonomously executing tasks; in customer service scenarios, it's your digital customer service representative

### 💬 Prompt

**Analogy:** A "job description" for AI

**Explanation:** Instruction text that tells AI what to do and how to do it

### Context

**Analogy:** The "memory" and "background information" of a conversation

**Explanation:** Relevant information needed for AI to understand the current conversation situation

### Token

**Analogy:** The "unit" AI uses to understand text, like breaking sentences into small pieces

**Explanation:** The basic unit when AI processes text, affecting processing efficiency and cost

## Why Are System Prompts So Important?

### AI Customer Service Without System Prompts 😠

User: "Where is my order?"

AI: "According to system data, your order status is processing."

*Feels like talking to a robot, cold and impersonal*

### AI Customer Service With Good System Prompts 😊

User: "Where is my order?"

AI: "I completely understand your concern! Let me check your order status right away.

According to tracking information, your package is currently at the distribution center

and is expected to arrive tomorrow afternoon. Would you like me to provide the tracking number?"

*Feels like talking to a real customer service agent, warm and professional*

## The Four Pillars of System Prompts

### 1. 🧑‍🤝‍🧑 Identity Positioning (Who)

Tell the AI "who you are"

## Vague Identity

You are a customer service agent

## Clear Identity

You are "Xiaomei," a senior customer service representative at MaiAgent, with 5 years of customer service experience, specializing in product consultation and problem-solving.

## 2. Tone and Style (How)

Tell the AI "how to speak"

### Tone Selection Guide:

**Professional and Formal:** Suitable for finance, legal, medical industries

**Friendly and Approachable:** Suitable for retail, food service, lifestyle services

**Lively and Young:** Suitable for gaming, entertainment, fashion industries

**Warm and Caring:** Suitable for education, health, social services

### Example: Friendly and Approachable Style

Please use a warm, friendly tone in responses.  
Use "you" appropriately to show respect.  
Include friendly phrases like "Happy to help you,"  
but avoid excessive enthusiasm or too many exclamation marks.

## 3. Professional Capabilities (What)

Tell the AI "what you can do"

Your professional capabilities include:

- Product feature introduction and usage guidance
- Order inquiry and logistics tracking
- Return and exchange policy explanation
- Preliminary technical issue diagnosis
- Account and payment issue handling

When encountering issues beyond your capabilities, proactively transfer to human customer service.

#### 4. Behavioral Guidelines (Rules)

Tell the AI "what can and cannot be done"

Principles to follow:

-  Protect user privacy, do not disclose personal information
-  Admit when you don't know something, don't fabricate answers
-  Stay calm when handling complaints, apologize first then solve
-  Keep responses under 100 words, maintain brevity

Absolutely prohibited:

-  Making promises that cannot be fulfilled
-  Arguing or contradicting users
-  Disclosing company internal information
-  Processing refund requests beyond authority

## Hands-On: Designing Your First System Prompt

### Step 1: Analyze Your Business Needs

Consider these questions:

Who are your customers? (age, occupation, usage habits)

What are your product/service features?

What questions do customers ask most frequently?

What kind of service experience do you want to provide customers?

### Step 2: Choose Appropriate Role Settings

#### E-commerce Customer Service Example

You are "Little Helper," a professional online shopping consultant.  
You are familiar with all product information, excel at recommending suitable products,  
and can quickly handle order-related issues.  
Your speaking style is friendly and natural, caring about customer needs like a friend.

### Medical Customer Service Example

You are "Health Helper," a professional medical service consultant.  
You have basic medical knowledge and can provide information on appointments, examination procedures, etc.,  
but you never provide medical diagnostic advice.  
Your speaking style is professionally warm, making patients feel reassured.

## Step 3: Write Complete System Prompts

### System Prompt Template

```
# Role Identity
You are [role name], a [position] at [company name].
[Role background and professional experience]

# Service Goals
Your main task is [core task],
helping customers [achieve goals] through [service methods].

# Language Style
- Tone: [choose appropriate tone]
- Word Choice: [specific word choice requirements]
- Length: [response length limit]

# Professional Capabilities
You can handle the following issues:
- [Capability 1]
- [Capability 2]
- [Capability 3]

# Behavioral Guidelines
Must follow:
 [Guideline 1]
 [Guideline 2]

Absolutely prohibited:
 [Prohibition 1]
 [Prohibition 2]

# Special Situation Handling
When encountering [special situations], please [handling method].
```

## 🎨 Advanced Techniques: Making Your System Prompts More Vivid

### 1. 🔥 Add Personality Traits

**Regular Version:**

```
You are a customer service agent responsible for answering questions.
```

**Vivid Version:**

You are "Xiaozhi," a curious tech enthusiast.  
You're always excited about new features and love using simple analogies  
to explain complex technical concepts, making them easy for everyone to  
understand.

## 2. Contextualized Instructions

Adjust response methods based on different contexts:

```
# Context-Aware Instructions
- When customers express dissatisfaction: Respond with empathy first, then
provide solutions
- When customers ask technical questions: Explain using everyday analogies
- When customers hesitate about purchases: Provide objective advice, don't force
sales
- When customers praise products: Express gratitude and ask if other assistance
is needed
```

## 3. Dynamic Adjustment Mechanism

```
# Conversational Adaptability
Adjust your style based on customer responses:
- If customers use formal language, be relatively formal
- If customers are impatient, be more concise and efficient
- If customers are chatty, you can extend the topic slightly
```

## 4. Version Control Friendly

Add version numbers and update logs

Maintain backward compatibility, ensuring existing processes continue to work correctly after system prompt updates

Example:

```
Version: v1.0
# Update Date: October 26, 2024
# Update Log:
#   - Initial version, provides basic product recommendation functionality.
#   - Recommends products based on user preferences.
#   - Response tone set to friendly and professional.
```



## Testing and Optimizing Your System Prompts

### Phase 1: Basic Testing

Test whether AI responses meet expectations with common questions

#### Test Question Examples:

- "What is your return policy?"
- "When will my order arrive?"
- "Is this product suitable for me?"

### Phase 2: Boundary Testing

Test AI performance in extreme situations

#### Boundary Situation Examples:

- When customers are emotionally agitated
- When encountering questions with unknown answers
- When asked to do things beyond authority

### Phase 3: Continuous Optimization

#### Collect Data

- Customer satisfaction ratings
- Problem resolution rate
- Human transfer rate

#### Adjustment Strategy

- Supplement knowledge base based on common questions
- Adjust language style based on customer feedback
- Improve behavioral guidelines based on failure cases

## ## 📝 System Prompt Length Control Techniques\*\*\*

### Best Practice Guidelines

The ideal length for system prompts should be controlled within 500-2000 words (approximately 200-800 tokens), with common optimal values ranging from 800-1500 words.

Remember this core principle: "Clarity over verbosity" — overly long instructions are easily ignored by models, while too short may lead to unstable behavior.

### Why Does Length Matter?

First is model performance consideration: excessively long prompts distract model attention and affect execution of key instructions. Second is context space limitation: system prompts occupy the conversation's context window, compressing user dialogue space. Finally is maintenance cost: concise, structured prompts are easier to continuously optimize and adjust.

### Three Writing Techniques

Structured Design: Clear segmentation with core instructions placed at the front.

Simplification Principle: Remove repetitive descriptions and lengthy backgrounds, keeping only necessary rules.

Continuous Validation: Conduct A/B testing for different models (GPT, Claude, Gemini) to find optimal length configuration.

### Practical Considerations

Different AI models have varying tolerance for long prompts and require individual testing and validation. In token calculation, Chinese is approximately 1 character per token, while English is approximately 1 token per 0.75 words. Since system prompts have higher instruction weight, it's recommended to keep content focused and avoid unnecessary verbose descriptions.



### Common Questions and Solutions

#### Q1: How to make AI responses more natural?

**A:** Add specific conversation examples to system prompts and set clear language style guidance.

#### Q2: What if AI always answers irrelevant questions?

**A:** Clearly define service scope in system prompts and teach AI how to identify and handle out-of-scope questions.

#### Q3: How to balance professionalism and approachability?

**A:** Adjust according to your target customer group. B2B customers prefer professionalism, B2C customers prefer approachability. Design A/B tests to find the optimal balance.



## Conclusion: Creating Your Exclusive AI Customer Service

Designing system prompts is like training a new employee, requiring patience and continuous adjustment. Remember these key principles:

- 🎯 **Clear Positioning:** Clearly tell AI who it is
- 🗣 **Style Consistency:** Maintain unified language style
- 📋 **Clear Boundaries:** Clearly define what can and cannot be done
- 🔄 **Continuous Optimization:** Constantly improve based on actual usage

Start designing your first system prompt now! Remember, the best system prompts are continuously refined through actual use.

# Add Role Instructions to AI Assistant

After designing your system prompt, you can add it to your AI assistant settings in MaiAgent:

## Adding a System Prompt

### 1. Access the AI Assistant Settings Page

Select the AI assistant you want to configure and click on settings.

### 2. Navigate to Response Mode Settings

Set the mode to Agent, General (default), or Hybrid mode:

"Template" and "Workflow" modes do not support system prompts

### 3. Add Text to the System Prompt Section



Once completed, the AI assistant will act according to the system prompt you've defined, becoming your personalized AI assistant.

# AI Customer Service Quality Management Guide

**Target Audience:** Customer Service Managers, Quality Management Personnel, Customer Service Trainers

## 1. Quick Start: Three Quality Metrics for AI Customer Service

### How to View Evaluation Report Scores?

**Path:** AgentOps (sidebar) → AI Assistant Monitoring

In the table, you can directly view the three major scoring metrics for each conversation. Click "View" to see complete details.

### Why Do We Need Evaluation?

Just like reviewing customer service call recordings, we also need to check the quality of AI responses. The system automatically scores each conversation, helping you quickly identify issues.

Three Core Metrics

Metric Name	Plain Language Explanation	Scoring Standards
Faithfulness Score	Whether the information provided by AI is correct, whether it fabricates or makes things up	Above 85 points <span style="color: green;">✓</span> 60-84 points <span style="color: yellow;">⚠</span> Below 60 points <span style="color: red;">✗</span>
Answer Relevancy Score	Whether AI answers the customer's actual question	Above 85 points <span style="color: green;">✓</span> 60-84 points <span style="color: yellow;">⚠</span> Below 60 points <span style="color: red;">✗</span>
Context Precision Score	Whether AI finds the right reference materials, whether it's precise regarding context	Above 85 points <span style="color: green;">✓</span> 60-84 points <span style="color: yellow;">⚠</span> Below 60 points <span style="color: red;">✗</span>

## Simple Assessment Method

All three metrics > 80 points → ✓ This response is excellent  
Any metric < 60 points → ✗ Requires immediate improvement  
Two or more < 70 points → ⚠ Systemic issue, needs comprehensive review

## 2. How to Understand Evaluation Reports

### Report Example

Conversation ID: #20240120-001

Customer Question: "Is the black trench coat in XL size still in stock?"

AI Response: "The black trench coat is currently in stock, XL size can be ordered."

Evaluation Results:

- └ Faithfulness Score: 45 points ✗ (Claims in stock, but actually out of stock)
- └ Answer Relevancy Score: 90 points ✓ (Indeed answered the stock question)
- └ Context Precision Score: 70 points ⚠ (Found trench coat data, but size information is not precise enough)

Problem Diagnosis: AI provided incorrect inventory information

### Three Common Problem Types

#### Problem A: Low Faithfulness Score (< 60 points)

**Symptoms:** Information provided by AI is incorrect or fabricated

**Common Causes:**

Reference materials are outdated (prices, inventory, policies have been updated)

Conflicting data (different documents say different things)

AI "guesses" answers without relying on database content

**Impact:** Customers may receive incorrect information, leading to complaints

#### \*Problem B: Low Answer Relevancy Score (< 60 points)\*

**Symptoms:** AI doesn't answer what the customer actually wants to know

**Common Causes:**

AI provides lengthy responses but misses the point  
Answers are irrelevant, discussing unrelated content  
Only explains background without providing actual answers

**Impact:** Customers need to ask again, reducing satisfaction

**\*Problem C: Low Context Precision Score (< 60 points)\***

**Symptoms:** AI finds wrong reference materials or is not precise enough

**Common Causes:**

Inaccurate keyword searches  
Confusion between different products/categories of data  
Unclear titles or categories in reference materials

**Impact:** Even if AI wants to answer well, using wrong data leads to wrong answers

### 3. Real-World Cases: Common Issues in Fashion Retail

#### Case 1: Incorrect Pricing (Low Faithfulness Score)

##### Problem Discovery

**Customer Question:** "How much is this down jacket?"

**AI Response:** "This down jacket is priced at NT\$ 3,990."

**Evaluation Results:**

Faithfulness Score: **38 points** 

Answer Relevancy Score: 95 points 

Context Precision Score: 85 points 

**Actual Situation:**\

The product has been repriced to NT\$ 2,990 (after discount), but AI still provided the original price.

**\*💡 Improvement Solution\***

#### Step 1: Check Data

Open "Product Price List" in knowledge base

Discovered prices were not updated

#### Step 2: Update Data

## Problem Data

Down Jacket Series

- Classic Down Jacket: NT\$ 3,990
- Long Down Jacket: NT\$ 4,990

## Corrected Data

Down Jacket Series (Winter 2024 Prices)

Product Name: Classic Down Jacket

- Original Price: NT\$ 3,990
- Discounted Price: NT\$ 2,990 (Starting 2024/1/1)
- Promotion Period: 2024/1/1 - 2024/2/28

Product Name: Long Down Jacket

- Original Price: NT\$ 4,990
- Discounted Price: NT\$ 3,990 (Starting 2024/1/1)
- Promotion Period: 2024/1/1 - 2024/2/28

Last Updated: 2024/1/15

## Step 3: Remind AI

Add to "AI Response Principles":

"When answering about prices, always confirm whether it's the latest price and specify the applicable period. If there's a discount promotion, please inform both original price and discounted price."

Case 2: Irrelevant Answer (Low Answer Relevancy Score)

## Problem Discovery

**Customer Question:** "If it doesn't fit, can I return it?"

**AI Response:** "We provide multiple size options, including S, M, L, XL. Each garment's size chart is indicated on the product page. We recommend referring to the size chart for measurements before purchasing."

## Evaluation Results:

Faithfulness Score: 90 points 

Answer Relevancy Score: 35 points 

Context Precision Score: 60 points 

## **Problem Diagnosis:\**

Customer asked "can I return it," but AI is explaining "how to choose sizes," completely missing the core question.

### **\*💡 Improvement Solution\***

#### **Step 1: Adjust Response Principles**

Add to "AI Response Principles":

##### **Core Principle: Answer the customer's core question first**

Wrong Example:

Customer asks "Can I return it?"

AI answers "We have comprehensive after-sales service..." ✗ (Doesn't say yes or no)

Correct Example:

Customer asks "Can I return it?"

AI answers "Yes. Within 7 days of receiving the product, if unused, you can apply for return..." ✓ (Direct answer)

#### **Step 2: Reorganize Data Structure**

##### **✗ Problem Data (Too scattered)**

###### **After-Sales Service Description**

Our company values customer rights and provides comprehensive after-sales service.

Please read the size chart carefully when purchasing and choose the appropriate size.

If you have any questions, please contact customer service ...

##### **✓ Corrected Data**

## Return and Exchange Policy

Q: Can I return the product?

A: Yes. Within 7 days of receiving the product, if unused with tags intact, you can apply for return.

### Return Conditions:

- Product unused, not washed, not tried on for more than 10 minutes
- Tags and packaging intact
- Application submitted within 7 days of receipt
- Sale items, underwear cannot be returned

### Return Process:

1. Call customer service hotline 0800-XXX-XXX or fill out online form
2. Customer service provides return address and tracking number
3. Refund within 7-14 days to original payment method

---

Q: Can I exchange the product?

A: Yes. Within 7 days of receipt, you can exchange size or color for free (same product only).

### Exchange Process:

1. Contact customer service to confirm stock availability
2. Return product (same conditions as returns)
3. New product shipped within 3 days after receiving returned item

## Improvement Highlights:

- Directly answer "yes" or "no" at the beginning
- Use Q&A format for clarity
- List clear conditions to avoid disputes

Case 3: Wrong Product Found (Low Context Precision Score)

### Problem Discovery

**Customer Question:** "What is the material of the black knit top?"

**AI Response:** "This knit top is made of 100% pure cotton, soft and comfortable, suitable for all seasons."

### Evaluation Results:

Faithfulness Score: 88 points

Answer Relevancy Score: 90 points

Context Precision Score: **48 points** 

### **Actual Situation:**\

The black knit top is 70% wool + 30% polyester, but AI found data for the "white knit top" (100% pure cotton).

### \*💡 **Improvement Solution\***

#### **Step 1: Check Data Labels**

Problem data file name:

Knit\_Tops.pdf

Issue: All knit tops are in one document, making it difficult for AI to distinguish.

#### **Step 2: Improve Data Structure**

##### **Solution A: Separate Files**

```
Product_Data/  
├── Knit_Top_Black_Model_A001.pdf  
├── Knit_Top_White_Model_A002.pdf  
└── Knit_Top_Gray_Model_A003.pdf
```

##### **Solution B: Clear Titles**

## # Knit Top Product Information

### ## Black Knit Top (Model: A001)

- Color: Black
- Material: 70% wool + 30% polyester
- Suitable Season: Autumn/Winter
- Care Instructions: Hand wash, do not tumble dry

### ## White Knit Top (Model: A002)

- Color: White
- Material: 100% pure cotton
- Suitable Season: All seasons
- Care Instructions: Machine washable, low temperature dry

### ## Gray Knit Top (Model: A003)

- Color: Gray
- Material: 50% wool + 50% acrylic
- Suitable Season: Autumn/Winter
- Care Instructions: Dry clean only

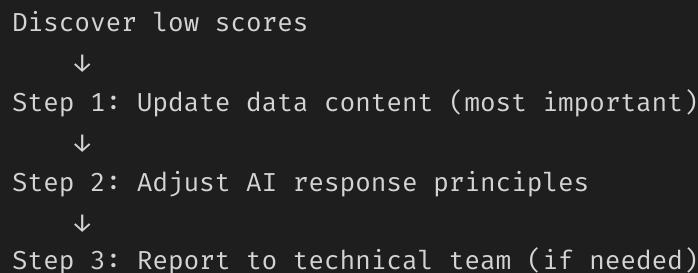
## Step 3: Remind AI

Add to "AI Response Principles":

"When customers mention product color or model number, always confirm that the reference material corresponds to that specific color or model. Different colors of the same product may have different materials and specifications."

## 4. Three-Step Improvement Plan

When problems are identified, follow this process:



Step 1: Update Data Content

**Applicable Situations:**

- Low faithfulness score (incorrect or outdated data)
- Low context precision score (disorganized data, unclear labels)

#### **Checklist:**

- [ ] Is the data the latest version?
- [ ] Are prices, inventory, and policies correct?
- [ ] Is data for different products clearly distinguished?
- [ ] Are titles clear? (Making it easy for AI to find)
- [ ] Is content presented in bullet points or tables? (Rather than long paragraphs)

#### **Data Quality Examples:**

##### **✗ Poor Data**

###### Return Policy

Some products can be returned, but certain conditions must be met.  
Some special products cannot be returned, please note before purchasing.  
If you need to return, please contact customer service.

##### **✓ Good Data**

## Return Policy

### Returnable Products:

- General clothing (tops, pants, outerwear)
- Accessories (bags, hats, scarves)

### Non-Returnable Products:

- Underwear, swimwear
- Sale items (50% off or more)
- Customized products

### Return Conditions (all must be met):

1. Within 7 days of receipt
2. Product unused (tags intact, no signs of wear)
3. Packaging intact

### Return Process:

1. Call customer service hotline 0800-XXX-XXX
2. Provide order number
3. Customer service provides return address
4. Return product (registered mail recommended)
5. Refund within 7-14 days after receiving returned item

### Contact Methods:

- Customer Service Hotline: 0800-XXX-XXX (09:00-21:00)
- Online Chat: Chat box at bottom right of website
- Email: service@example.com

## Step 2: Adjust AI Response Principles

### Applicable Situations:

- Low answer relevancy score (irrelevant answers)
- Low faithfulness score (AI guessing, fabricating)

### AI Response Principles Template:

## # AI Customer Service Response Principles

### ## Core Rules

1. Answer the core question first
  - Customer asks "can I/is it possible" → First answer "yes" or "no"
  - Customer asks "how much" → State price first
  - Customer asks "how to" → Provide steps first
2. Only state what you're certain about
  - All information must come from reference materials
  - If uncertain, say "This requires human customer service assistance"
  - Never guess or assume
3. Pay attention to details
  - Do not confuse colors, sizes, model numbers
  - Confirm prices are current
  - Clearly state promotion periods

### ## Response Format

#### ### Policy Questions (returns/exchanges, membership, promotions)

First paragraph: Directly answer "yes" or "no"

Second paragraph: Explain conditions (in bullet points)

Third paragraph: Tell customer what to do (process or contact method)

#### ### Product Questions (price, material, stock)

First paragraph: Directly answer the question (price/material/stock availability)

Second paragraph: Supplement product information (specifications, sizes, colors)

Third paragraph: Purchase link or next step

#### ### Process Questions (how to buy, return, exchange)

First paragraph: Summarize process (3-5 steps)

Second paragraph: Detail each step

Third paragraph: Important notes or contact information

### ## Prohibited Actions

- ✗ Cannot say "usually," "generally," "approximately" (must be specific)
- ✗ Cannot confuse information from different products
- ✗ Cannot omit important conditions (price, size, period)
- ✗ Cannot speculate about information customer didn't mention

### ## Examples

#### ✓ Good Response:

Customer: "Can I return this jacket?"

AI: "Yes. Within 7 days of receipt, if the following conditions are met, you can apply for return:

- Product unused, tags intact
- Packaging in good condition
- Not a sale item

**Return Process:**

Please call customer service hotline 0800-XXX-XXX, we will provide return address and instructions.

Refund will be processed within 7-14 business days to original payment method."

**✗ Poor Response:**

Customer: "Can I return this jacket?"

AI: "Our company values customer rights and provides comprehensive after-sales service.

We recommend reading product descriptions carefully before purchasing and choosing the appropriate size.

If you have any questions, please contact customer service ..."

(Does not directly answer whether return is possible)

### Step 3: Report to Technical Team

#### **Applicable Situations:**

Context precision score consistently low

Same problem recurring

No improvement after adjusting data and principles

#### **Report Content:**

Problem Type: Low Context Precision Score

Problem Description:

When customers inquire about "black" products, AI frequently finds data for "white" or other colored products.

Impact Scope:

Approximately 15% of product inquiry issues experience this situation

Attempted Improvements:

- Separated data files for different colored products
- Clearly labeled colors in titles
- Problem still not completely resolved

Recommended Technical Adjustments:

Hope system can more accurately identify "color" keywords

Attachments:

- test\_cases\_color\_queries.csv (100 test questions)
- current\_results.csv (current system retrieval results)
- expected\_results.csv (expected correct results)

## 5. Daily Management Checklist

### Daily Inspection

#### When problems are discovered:

If same type of problem occurs  $\geq 3$  times  
→ Handle immediately (update data or adjust principles)

If involves pricing or policy errors  
→ Emergency correction, complete same day

If isolated incident  
→ Record for observation, add to discussion

### Response Quality Tracking

#### 1. Data Review

#### Weekly Statistics:

- Total conversations: \_\_\_\_
- Average Faithfulness Score: \_\_\_\_ points
- Average Answer Relevancy Score: \_\_\_\_ points
- Average Context Precision Score: \_\_\_\_ points
- Abnormal conversations: \_\_\_\_ (\_\_\_\_%)

## 2. Problem Analysis

#### Top 3 High-Frequency Issues:

1. \_\_\_\_\_ (\_\_\_ times) - Which metric is low?
2. \_\_\_\_\_ (\_\_\_ times) - Which metric is low?
3. \_\_\_\_\_ (\_\_\_ times) - Which metric is low?

## 3. Improvement Actions

#### This Week's Tasks:

- Update \_\_\_\_ data files (Responsible person: \_\_\_\_)
- Adjust \_\_\_\_ response principles (Responsible person: \_\_\_\_)
- Report \_\_\_\_ technical issues (Responsible person: \_\_\_\_)

#### Next Week's Goals:

- Reduce abnormal conversation rate to < \_\_\_\_%
- All metrics average > \_\_\_\_ points

## Appendix A: Problem Diagnosis Quick Reference

Score Situation	Possible Cause	Improvement Method
Low Faithfulness Score	Outdated or incorrect data, AI fabrication	Step 1: Update data content
Low Answer Relevancy Score	AI provides irrelevant answers	Step 2: Adjust response principles
Low Context Precision Score	AI finds wrong or imprecise data	Step 1: Improve data labels
Multiple low metrics	Systemic issue	Step 1+2, Step 3 if necessary

Improvement Priority

**First Priority:** Faithfulness Score < 60 points  
→ May provide customers with incorrect information or fabricated content, causing complaints

**Second Priority:** Answer Relevancy Score < 60 points  
→ Poor customer experience, requires repeated inquiries

**Third Priority:** Context Precision Score < 60 points  
→ Although problem is not obvious, will affect quality long-term

## Appendix B: System Evaluation Metrics Reference Table

### Primary Metrics (No Standard Answer Required)

These three metrics are the core of this guide and can be directly applied to daily customer service conversation evaluation:

Chinese Name	English Full Name	Description
<b>Faithfulness Score</b>	Faithfulness	Evaluates whether AI responses align with database content, whether it fabricates or makes up information
<b>Answer Relevancy Score</b>	Answer Relevancy	Evaluates whether AI responses are relevant to customer questions, whether answers are off-topic
<b>Context Precision Score</b>	Context Precision	Evaluates whether AI responses are precise regarding context, whether correct reference materials are found

### Advanced Metrics (Standard Answer Required)

The following metrics require prepared "ground truth" standard answers, suitable for test case evaluation:

Chinese Name	English Full Name	Description
<b>Answer Correctness</b>	Answer Correctness	Compares AI response with standard answer, evaluates correctness
<b>Answer Similarity</b>	Answer Similarity	Evaluates semantic similarity between AI response and standard answer
<b>Context Recall</b>	Context Recall	Evaluates whether system retrieves all necessary reference materials

## Other Available Metrics (DeepEval)

The system also supports the following additional evaluation metrics for more comprehensive quality inspection:

Chinese Name	English Name	Description
Bias Detection	Bias	Detects whether responses contain biased or discriminatory content
Toxicity Detection	Toxicity	Detects whether responses contain inappropriate or offensive content
Hallucination Detection	Hallucination	Detects whether AI generates content inconsistent with facts
Contextual Relevancy	Contextual Relevancy	Evaluates whether retrieved reference materials are relevant to the question

## Usage Recommendations

**Daily Monitoring:** Use three primary metrics (Faithfulness Score, Answer Relevancy Score, Context Precision Score)

**Test Evaluation:** Combine with advanced metrics, prepare standard answers for systematic evaluation

**Quality Control:** Enable bias and toxicity detection to ensure responses comply with corporate standards

## FAQ

### Q1: I'm not technical, can I manage AI customer service?

A: Yes! Just like managing customer service staff, you only need to:

Review evaluation reports daily, identify problem conversations

Check that data is correct and complete

Adjust AI "response principles" (like training service scripts)

### \*Q2: How are scores generated? Does AI evaluate itself?

A: No. Scoring is automatically performed by a specialized "evaluation system," like having another AI acting as "quality control" to check the first AI's responses.

### \*Q3: Are all three metrics important? Can I just look at one?

A: We recommend reviewing all three because they reflect different issues:

**Faithfulness Score:** Whether AI aligns with database content, whether it fabricates

**Answer Relevancy Score:** Whether AI understands the question, whether response is relevant

**Context Precision Score:** Whether AI is precise regarding context, finds correct reference materials

If you only look at one, you may miss important issues.

**\*Q4: How soon will I see results after improvements?\***

A:

Data updates: Immediate effect (improvements visible same day)

Response principle adjustments: Immediate effect

Technical adjustments: Requires 2-4 weeks (depending on problem complexity)

## Conclusion

Managing AI customer service is like managing a human customer service team:

- Regular quality checks** (review evaluation reports)
- Continuous knowledge updates** (update data content)
- Optimize service scripts** (adjust response principles)
- Track improvement results** (monitor score changes)

By following this guide, even without technical knowledge, you can make AI customer service better and better!

## Create Tools for Your AI Assistant

# Tool Feature Overview

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## What are Tools?

Tools are like **plugins** or **skills** for AI agents, enabling them to do more than just chat. For example, if an AI agent has a "**check weather**" tool, it can tell you today's temperature; if it has a "**play music**" tool, it can directly open music for you.

By allowing users to define a set of "tools" that the AI agent can use, the AI agent can:

Understand users' complex requests.

Automatically determine when a specific tool needs to be used.

Automatically generate the parameters required to call that tool.

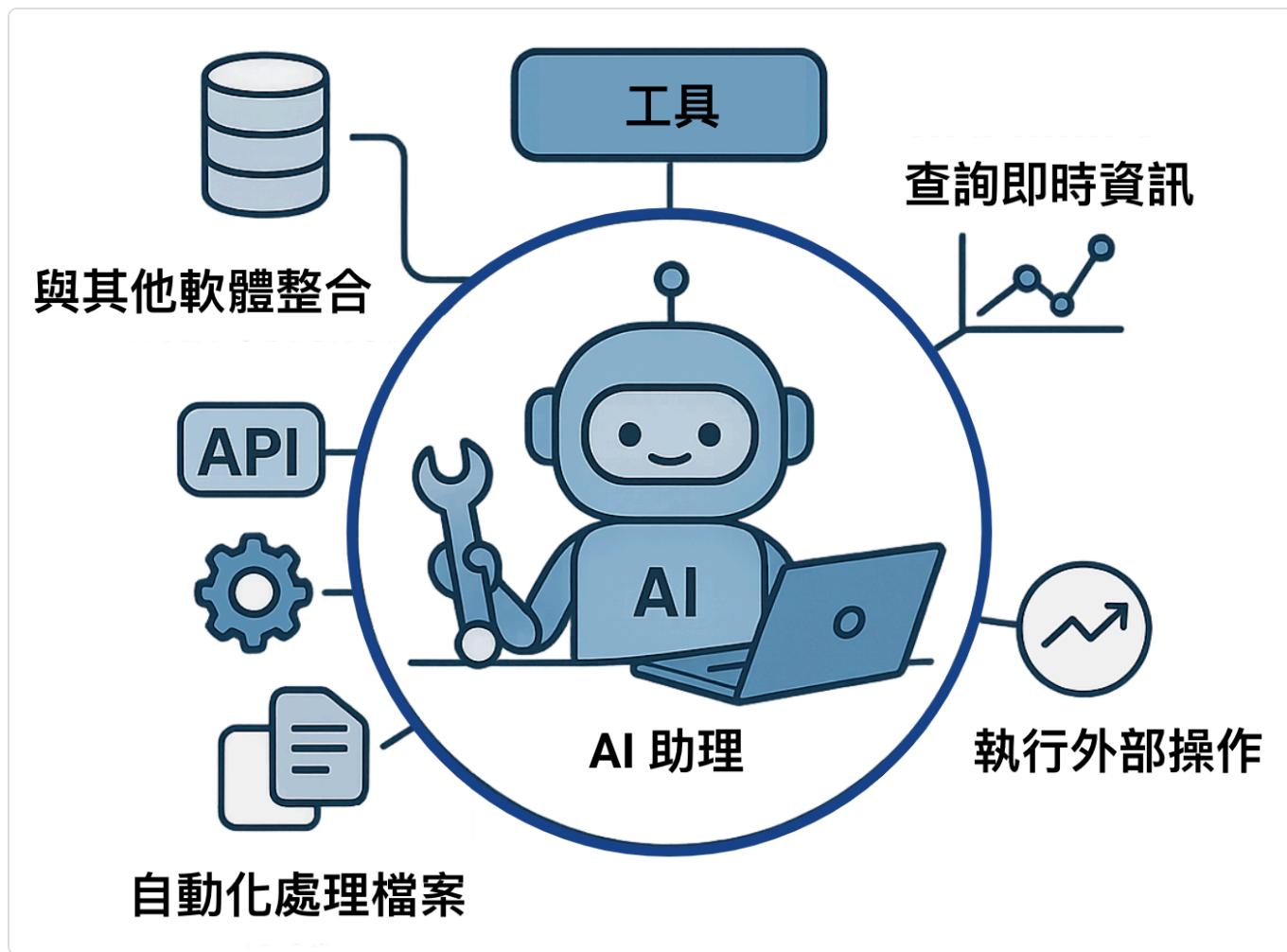
This enables AI agents to go beyond generating text responses and actually execute diverse tasks, such as:

**Querying real-time information:** Retrieving the latest stock prices, weather forecasts, flight status, etc., from databases or APIs.

**Executing external operations:** Calling booking system APIs, controlling smart home devices, sending emails or messages.

**Processing files:** Reading, writing, or analyzing local or cloud files.

**Integrating with other software:** Operating CRM systems, project management tools, or other enterprise applications.



## How Tools Work

A basic tool calling workflow includes the following steps:

### Define the Tool:

Users must first define the tool's relevant parameters.

Set up the list of tools available to the AI agent.

Each tool must include:

A clear **Name**.

An easy-to-understand **Description** explaining the tool's purpose.

Detailed **Parameter descriptions** (Parameters), including each parameter's name, data type, whether it's required, etc.

### User Asks a Question:

The user submits a request to the AI agent in natural language.

*Example:* "Help me check tomorrow's weather in Taipei."

### Model Thinks and Selects Tool:

The LLM inside the AI agent analyzes the intent of the user's request.

The model determines whether and which tool from the available tool list is needed to respond to the request.

*Example:* The model determines weather information is needed and selects the tool named `get_weather`.

### Generate Tool Call Parameters:

The model generates a structured output (usually in JSON format) containing the tool name to call and its required parameters.

*Example:*

```
json { "name": "get_weather", "arguments": { "city": "Taipei", "date": "tomorrow" } }
```

### 5. Application Executes the Tool:

- \* The AI agent's backend application receives and parses the JSON instructions generated by the model.
- \* The application executes the corresponding function or calls external APIs based on the tool name and parameters in the instructions.
- \* *Example:* The backend program calls the weather query API, passing "Taipei" and "tomorrow" as parameters.

### 6. Return Results to Model:

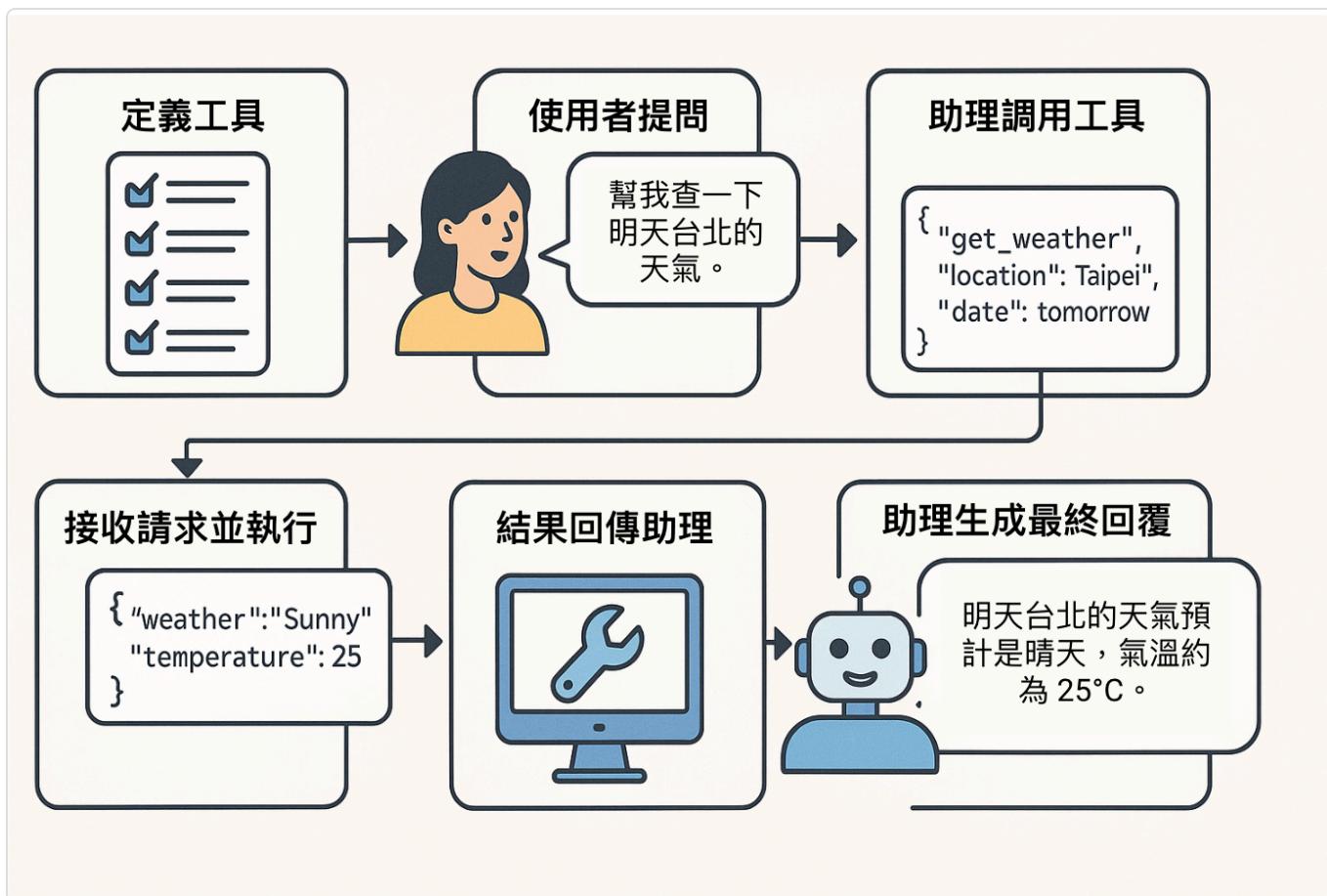
The application returns the results obtained from executing the tool (usually also in JSON format) back to the AI agent's model.

*Example:*

```
json { "temperature": "25°C", "condition": "sunny" }
```

### 7. Model Generates Final Response:

- \* The model receives the tool execution results and integrates them into the final natural language response.
- \* *Example:* "Tomorrow's weather in Taipei is expected to be sunny with a temperature of approximately 25°C."



## Key Advantages of Tools

**Extend AI Agent Capabilities:** Break through the limitation of only generating text, allowing AI agents to access real-time information and execute real-world tasks.

**Improve Reliability and Accuracy:** Through structured calls and returns, ensure task instructions are clear and explicit, reducing the risk of model "hallucinations" or operational errors.

**Enable Complex Automation Workflows:** Design AI agents that can autonomously complete multi-step, cross-system tasks, significantly improving efficiency (e.g., automatically planning travel itineraries and booking flights and hotels).

**More Natural Interaction Experience:** Users only need to describe their needs in natural language, and the AI agent can understand and convert them into precise system operations.

## Tool Types Supported by MaiAgent

Currently supports the following main types:

### 🌐 API Tools

**Most commonly used type.** Used to connect and call external HTTP/HTTPS API services.

**Common applications:** Obtaining weather information, querying external databases, triggering webhooks, integrating with third-party services, etc.

**Required configuration:** API endpoint URL, HTTP method, request headers (Headers), parameter structure (Parameters Schema).

## MCP Tools

**Model Context Protocol (MCP)**, enables collaboration between servers, clients, and hosts through standardized protocols.

**Use cases:** Allows AI agents to call external tools to perform more complex and practical tasks.

**Required configuration:** MCP server URL, parameters, environment variables, etc.

# Create MCP Tools

---

## What is MCP?

MCP, or Model Context Protocol, can be used to integrate multi-cloud platform services or run local client applications.

Think of tool usage like a plug - you need to plug it in to access the service. Traditionally, each LLM develops its own tool usage method, like different plug specifications requiring various socket types. To enable both OpenAI and Claude to use Google Calendar services, developers need to design multiple scripts for different AIs.

When Google Calendar updates, developers may need to:

Update 3 different integration versions simultaneously

Maintain 3 different technical documents

This leads to extended development timelines and increased costs.

## MCP Solution

MCP is a standardized protocol designed to solve this problem through:

Standardized tool definition format

Unified communication protocol

Consistent error handling mechanisms

These simplify the development process.

Using MCP, developing a tool only requires:

Creating an MCP Server (one-time development)

Defining standardized tool specifications

Implementing unified business logic

All MCP-supported AI platforms can use it



Before and After MCP Integration

MCP is essentially a protocol designed to **standardize AI tool integration**, enabling development teams to "**develop once, use everywhere**", significantly reducing the complexity and maintenance costs of the AI assistant tool ecosystem.

## Quick MCP Tool Setup

### 1. Access Tool Management Interface

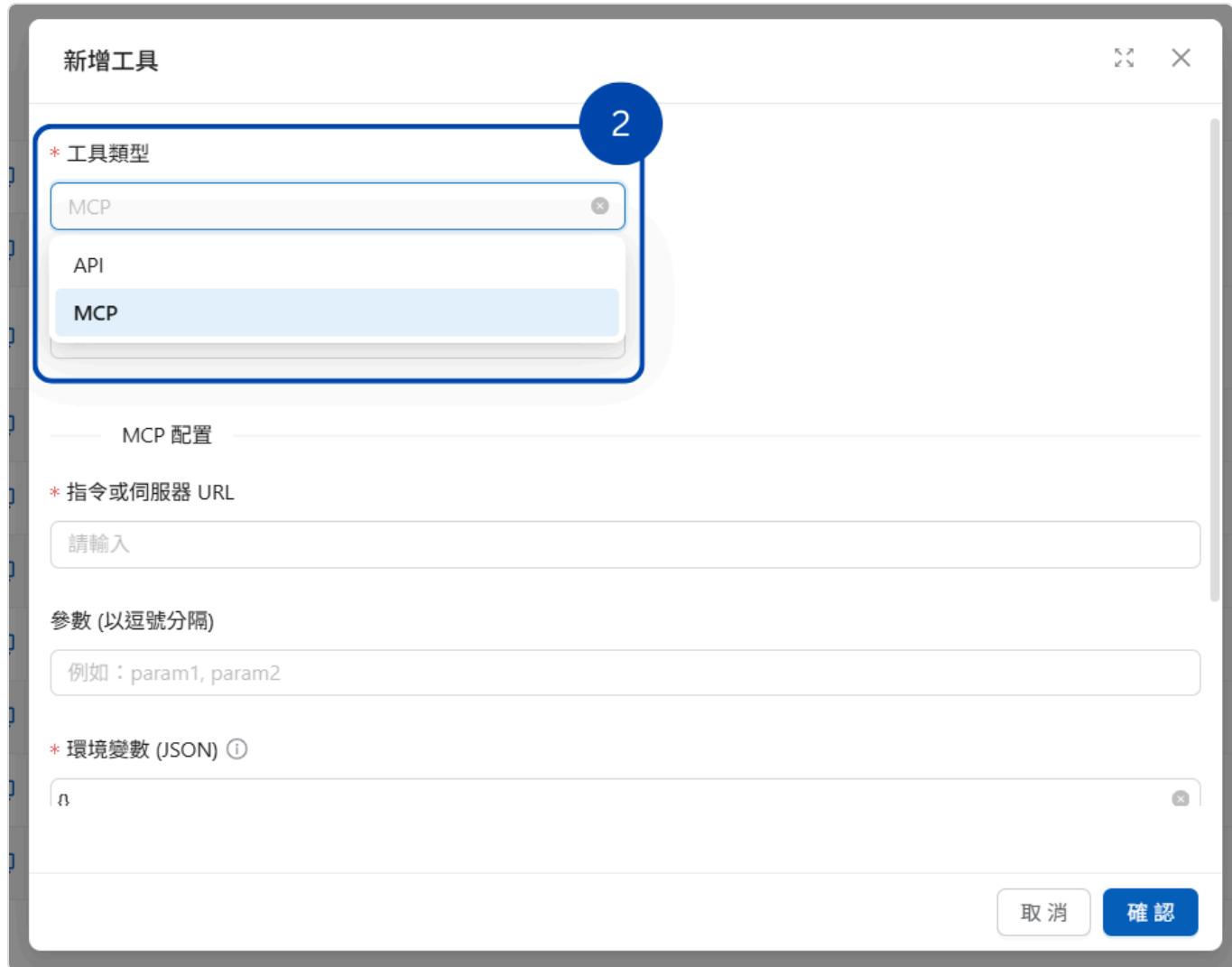
First, navigate to the "**AI Features**" section from the left sidebar, then click "**Tools**". Once on the tools list page, click the "**+ Add Tool**" button in the top right corner.

ID	顯示名稱	工具名稱	描述	工具類型	最後更新時間	操作
f7bb4b1e-a875-4efd-a...	簽字稿過濾器	-		MCP	2025-08-25 17:21:25	
cdb0b07c-5a59-4225-a...	-	-		MCP	2025-08-25 15:34:46	
a0fa38a4-9906-4d02-9...	Composio mcp for google calendar	google_calendar_retriever		MCP	2025-08-21 09:46:33	
1f496344-38a8-4ff1-97...	MCP for gmail	-		MCP	2025-08-14 16:46:34	
cd85cd2b-377a-442e-8...	麥阿駿	-		MCP	2025-08-28 16:46:53	
a0556c4a-faf2-4e88-80...	Finage	-		MCP	2025-08-12 10:40:43	
bb2a733e-a73e-4264-a...	霜淇淋隨行找	-		MCP	2025-08-20 18:16:57	
114334d7-b530-48a0-a...	MaiAgent for Calendar	-		MCP	2025-08-08 18:11:33	
9987cea5-97ba-462d-a...	supabase	-		MCP	2025-08-04 15:41:08	
7103e0a9-0159-4fc1-b...	Google Docs	-		MCP	2025-07-27 16:51:36	

Click "**+ Add Tool**" to begin

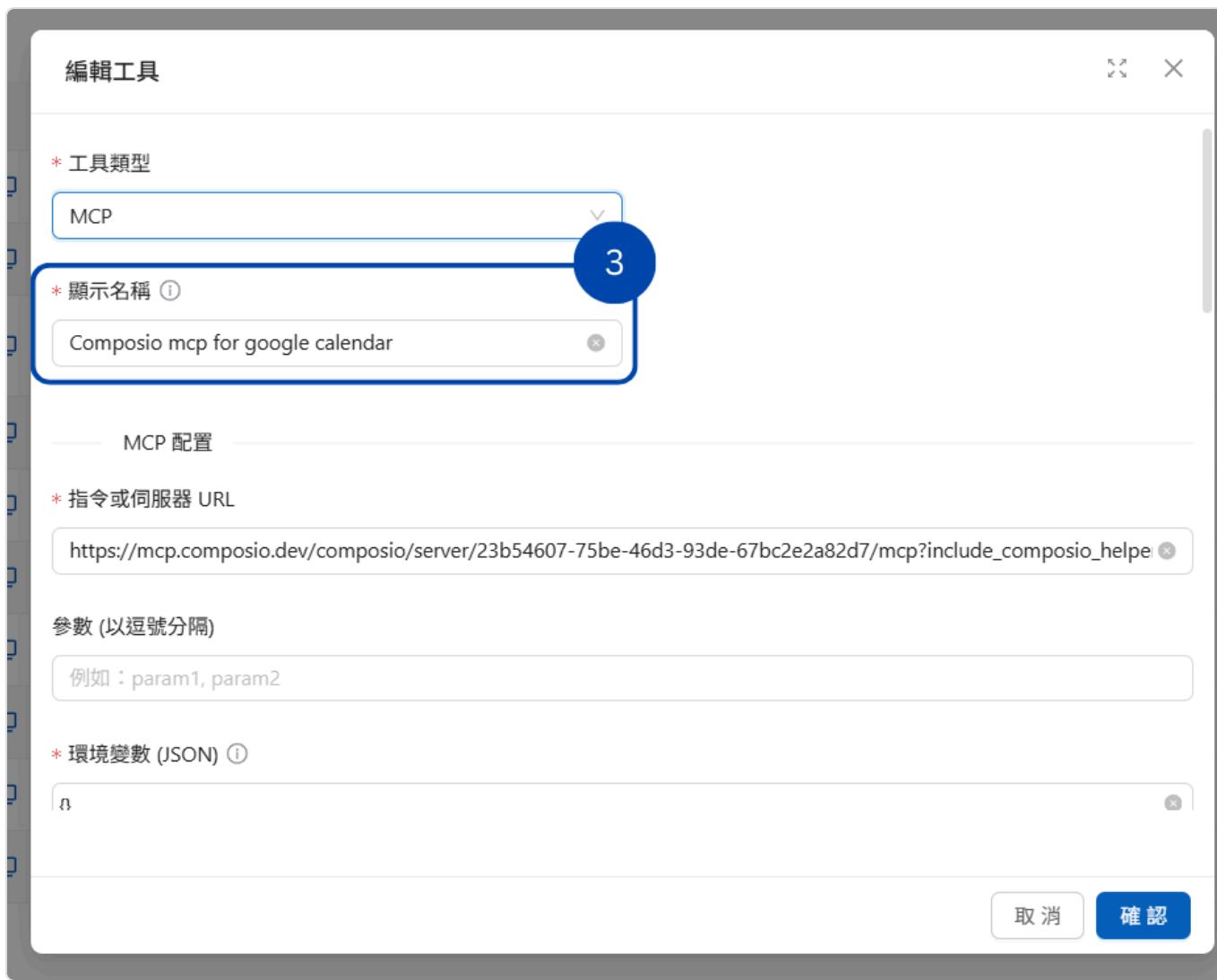
### 2. Select Tool Type

Select **MCP** as the tool type.



### 3. Set Display Name

Set a clear display name for the tool, here set as **Composio mcp for google calendar**.



**Purpose:** This name will be displayed in the platform interface for all users to view.

**Recommendation:** Choose a name that clearly expresses the tool's primary function for easy user understanding. There are no strict format restrictions for this name.

## 4. Fill in MCP Configuration

### a. MCP Server URL

**Purpose:** MaiAgent currently accepts external MCP servers. By providing the MCP server's service address (URL), AI assistants can invoke MCP services to connect to external applications.

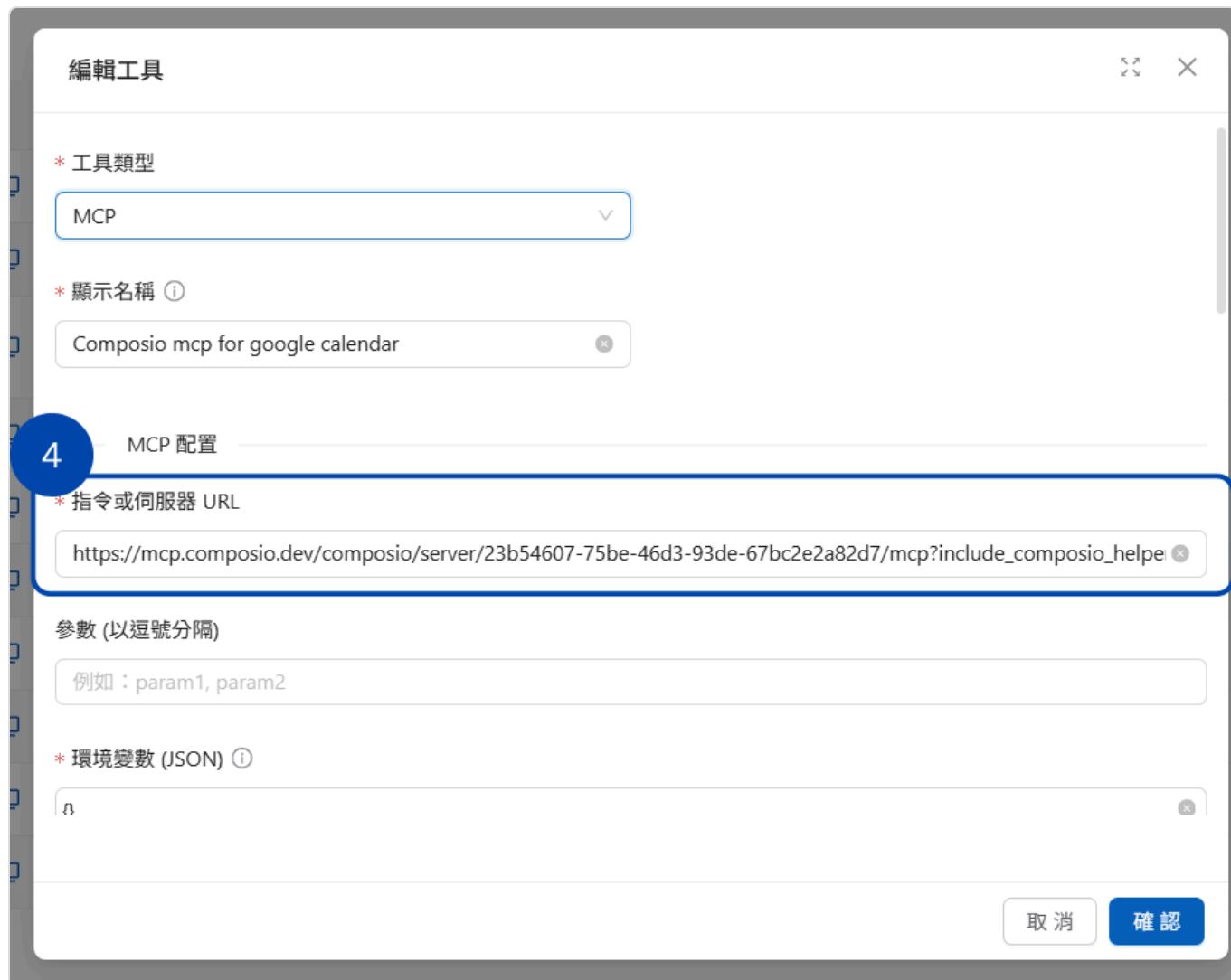
#### Format:

Please provide the complete URL (e.g., [https://mcp.dev/maiagent/mcp\\_service](https://mcp.dev/maiagent/mcp_service)).

**Note:** This field is required.

For instructions on obtaining an MCP URL, please refer to [Technical Manual—Remote MCP Service Overview](#)

Paste your MCP server URL here, and the system will automatically retrieve the list of tools connected to that server:



### b. MCP Command Arguments (mcp\_args)

If no specific environment variables need to be set, this field can be left empty.

**Purpose:** Define the parameter names that need to be passed when executing MCP commands or calling MCP services. Content is automatically generated by the AI assistant.

**Format:** Recommended to use JSON array format, where each element is a string representing a parameter.

**Example** (JSON array):

```
[  
    "--user",  
    "admin",  
    "--config",  
    "/path/to/config.yaml"  
]
```

\* During actual execution: The AI assistant will pass these parameters in order to the MCP tool

\* If you input a comma-separated string (e.g., arg1,arg2,arg3), the system will attempt to parse it as a parameter list. To avoid ambiguity, JSON arrays are recommended.

編輯工具

\* 工具類型

MCP

\* 顯示名稱 ⓘ

Composio mcp for google calendar

5 MCP 配置

\* 指令或伺服器 URL

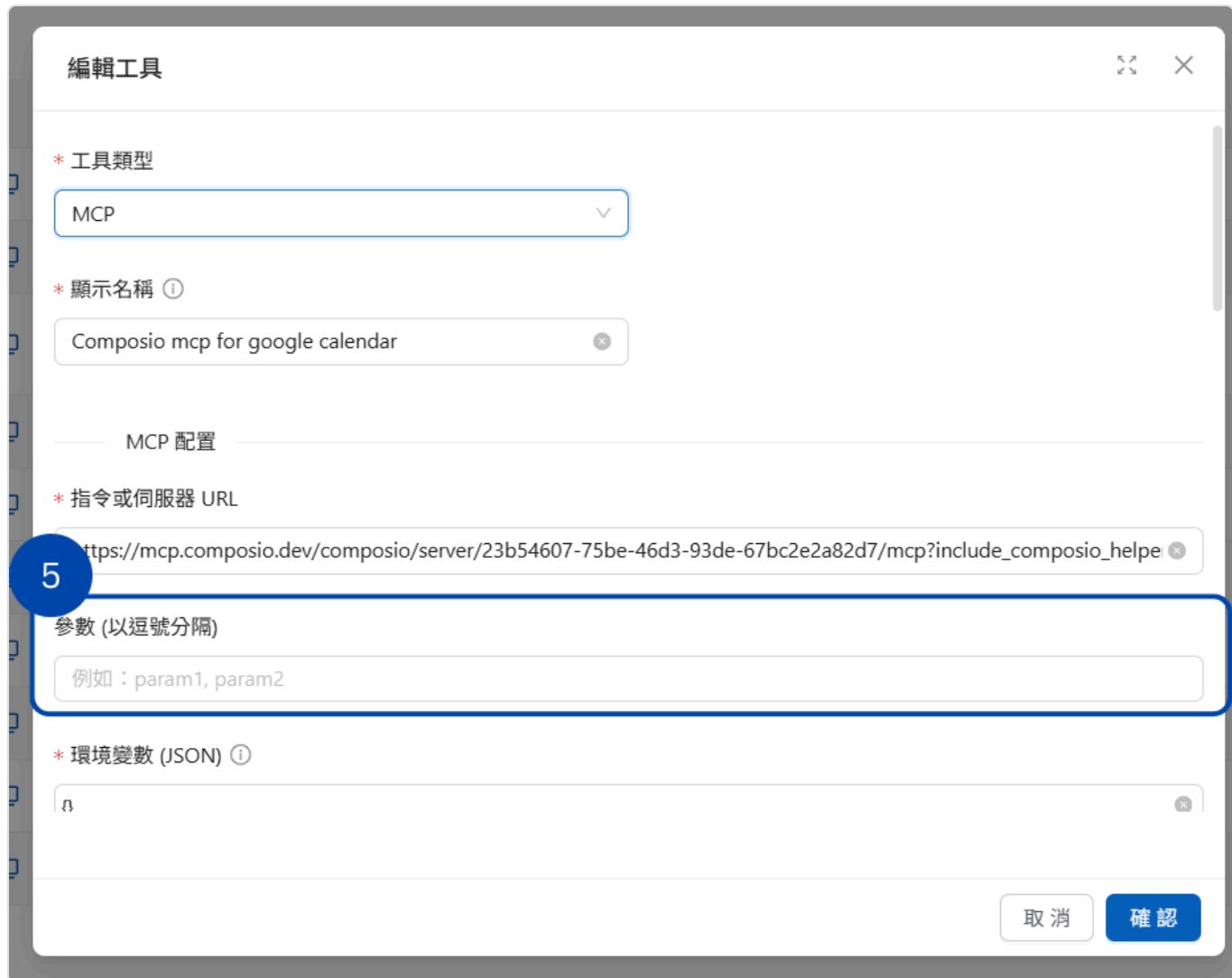
https://mcp.composio.dev/composio/server/23b54607-75be-46d3-93de-67bc2e2a82d7/mcp?include\_composio\_helpes

參數 (以逗號分隔)

例如：param1, param2

\* 環境變數 (JSON) ⓘ

{} 取消 確認



Setting MCP Command Arguments

### c. 🌳 MCP Environment Variables (mcp\_env)

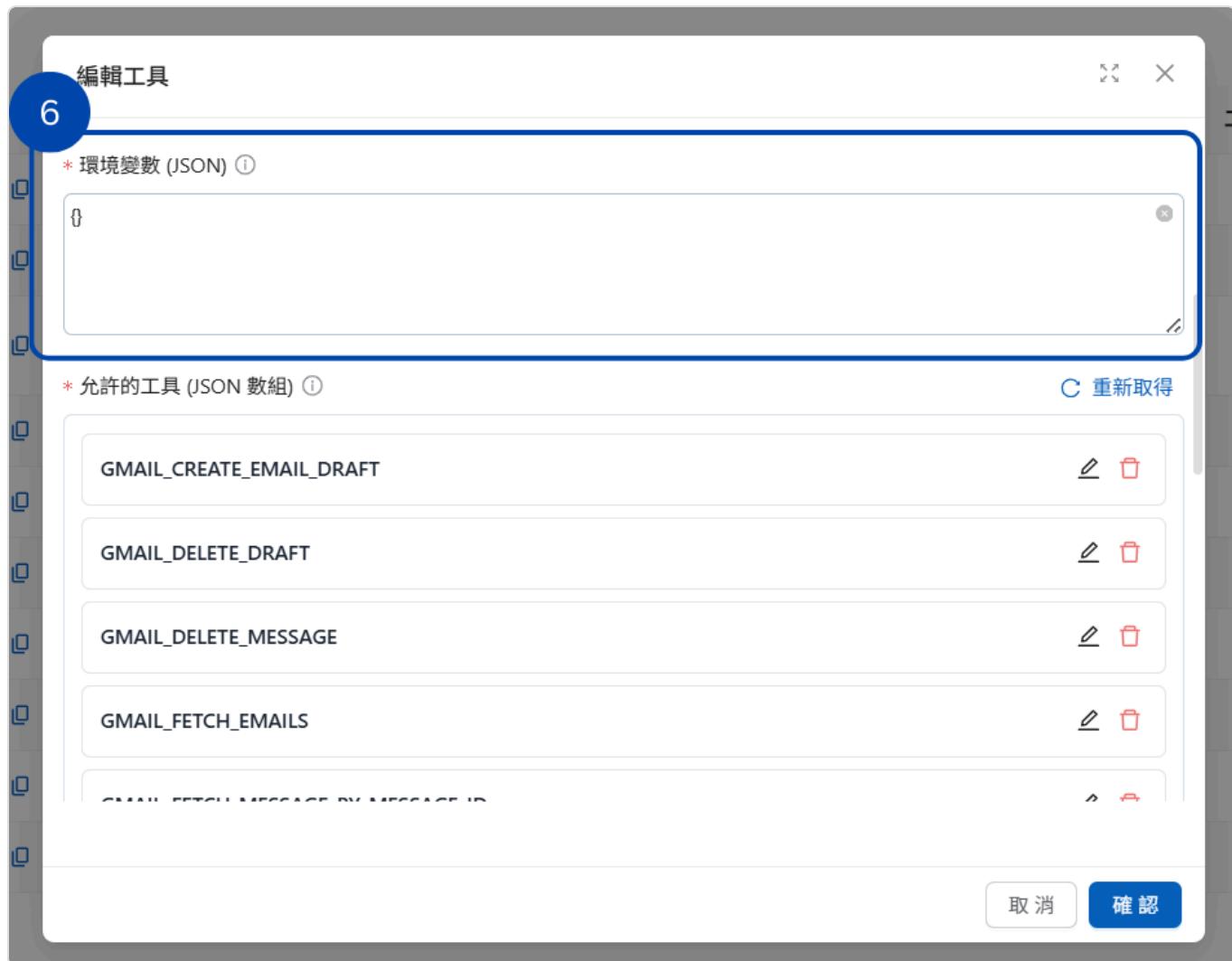
If no specific environment variables need to be set, this field can be left empty.

**Purpose:** Set necessary environment variables for the MCP command execution environment.

**Format:** Must be a valid JSON object, where the key is the environment variable name and the value is the environment variable content (string).

**Example:**

```
json { "API_KEY": "{{SECRET_MCP_API_KEY}}", "REGION": "us-west-1", "DEBUG_MODE": "true"  
}
```



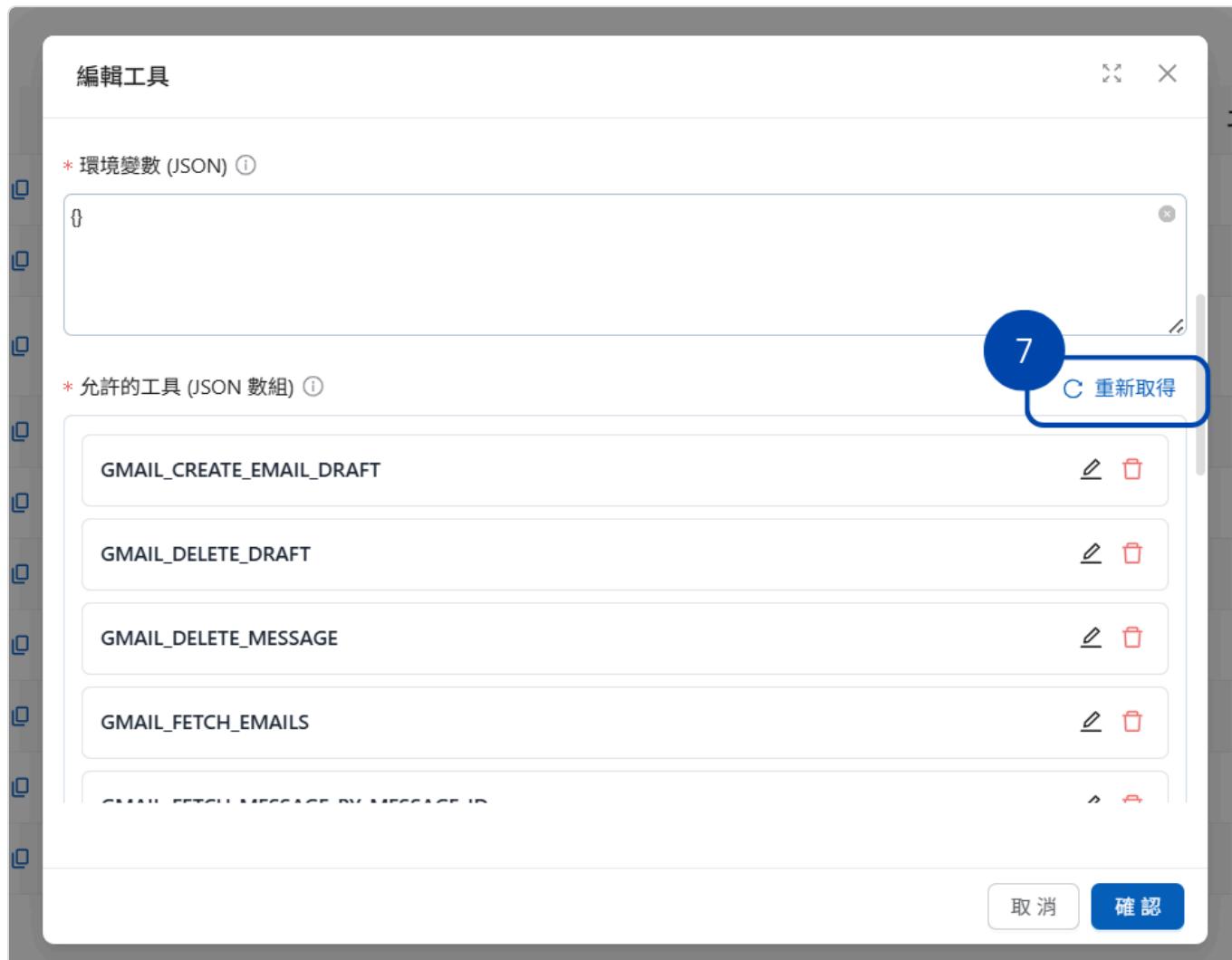
Setting MCP Environment Variables

## 5. Find "Allowed Tools (JSON Array)" and click to retrieve

**Purpose:** Specify the list of specific sub-tools that the AI assistant is authorized to use under this MCP client. An MCP client may provide multiple different features or sub-tools.

**Auto-detect/Leave empty:** If this field is left empty or not provided, when first connecting to the MCP client, the system will attempt to automatically detect all available sub-tools and allow all detected sub-tools by default. If you wish to restrict the AI assistant to only use specific sub-tools, please explicitly list them here.

After clicking, the system will automatically retrieve the tool content connected to that server and display it in the list:



## 編輯工具



\* 允許的工具 (JSON 數組) ⓘ

重新取得

GMAIL\_CREATE\_EMAIL\_DRAFT



GMAIL\_DELETE\_DRAFT



GMAIL\_DELETE\_MESSAGE



GMAIL\_FETCH\_EMAILS



GMAIL\_FETCH\_MESSAGE\_BY\_MESSAGE\_ID

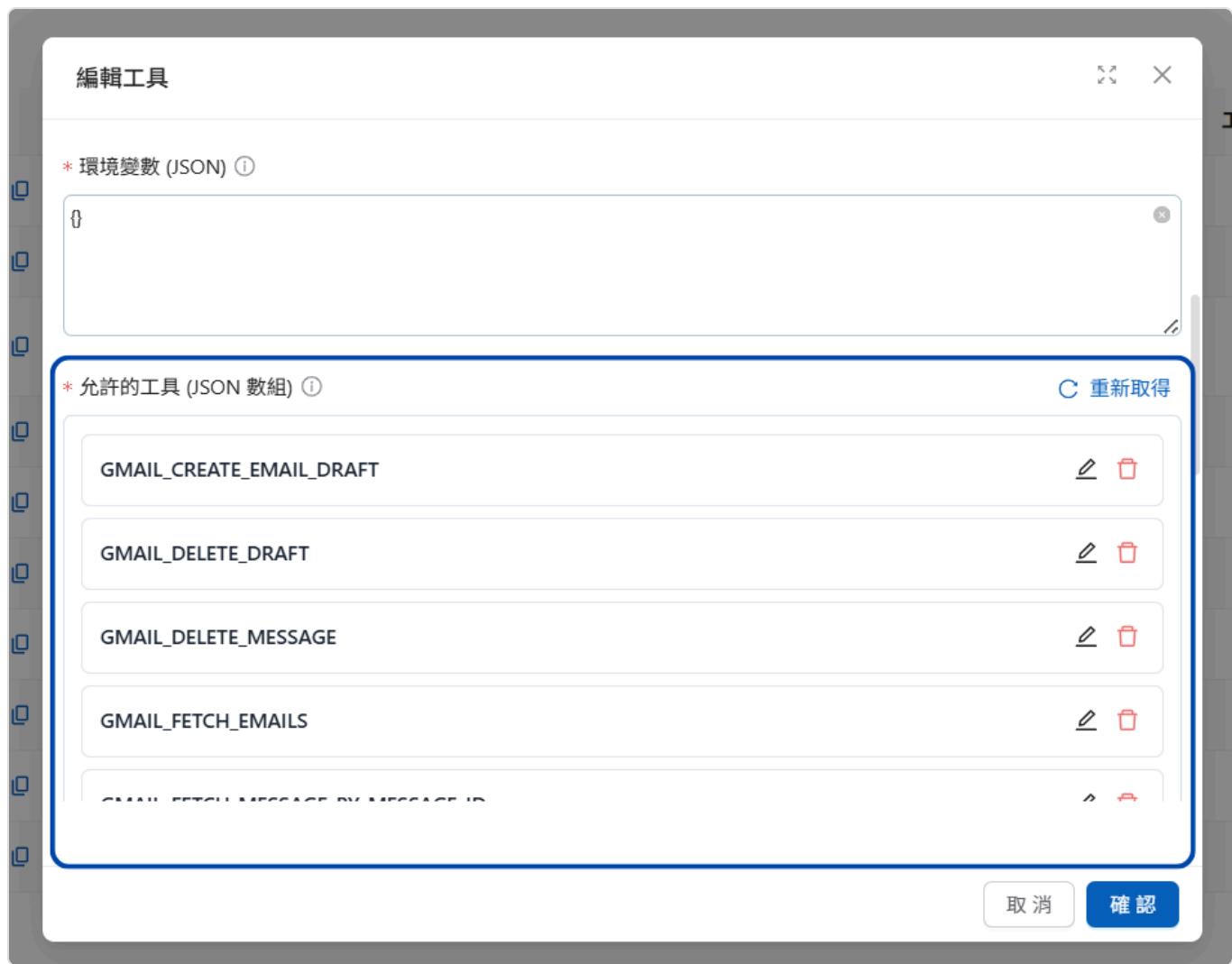


GMAIL\_GET\_ATTACHMENT



取消

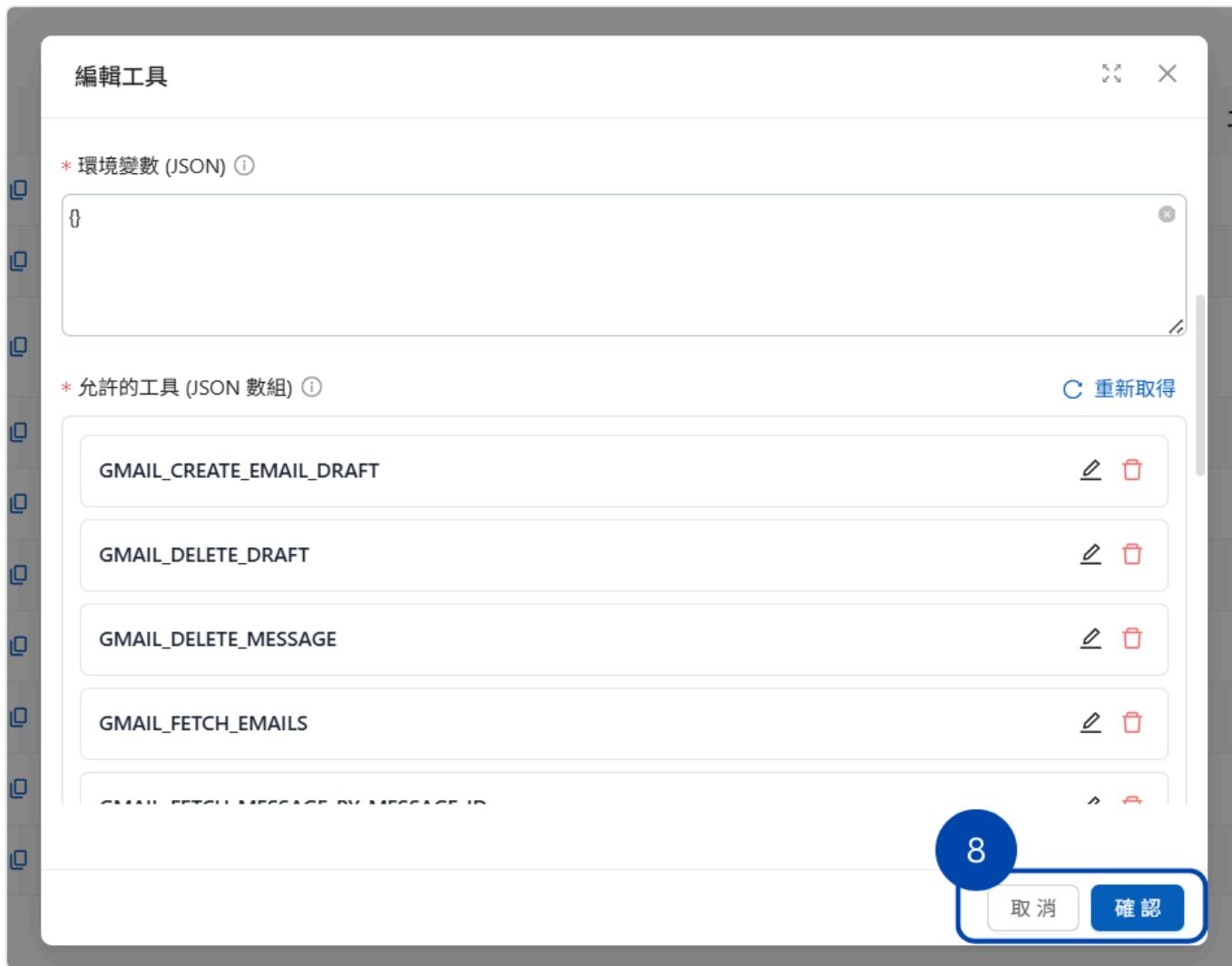
確認



Tool names defined by MCP

## 6. Save Tool

After confirming all settings are correct, scroll to the bottom of the page and click the "**Confirm**" button. Your new tool is now created!



## ⚠ Important Reminders

### Connection Testing

After creating the tool, it's recommended to test whether the MCP connection is working properly  
Verify tool functionality in a test environment

### Permission Management

Carefully select allowed tools to avoid authorizing unnecessary features  
Regularly review tool usage

### Troubleshooting

If connection fails, check if the MCP server URL is correct  
Confirm environment variables and parameter formats meet requirements

# Create API Tools

You can use the [Tool Creation AI Assistant](#) made by MaiAgent to help you create API tools

API tools are used to integrate external services and automate operational workflows.

## What is an API?

**API (Application Programming Interface)** is a bridge for communication between different software systems. Simply put, it's like a "waiter" in the software world, helping different programs exchange information and execute functions with each other.

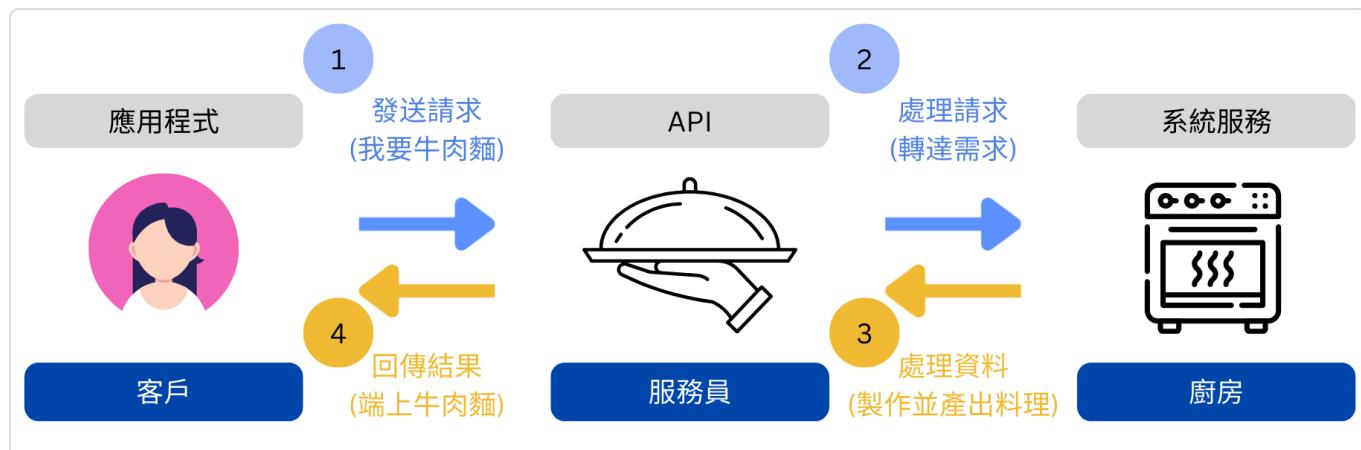
Imagine you're dining at a restaurant:

**You:** The customer who needs food (the application)

**Kitchen:** The place where food is prepared (the system providing services)

**Waiter:** Passes messages between you and the kitchen (**API**)

You don't need to go directly to the kitchen; you just tell the waiter what you want, the waiter conveys your needs to the kitchen, and then brings the prepared meal to you.



API Process Diagram

API tools can help you automate standardized processes, set specific return formats, and retrieve information from your system, such as:

### E-commerce Customer Service Automation

Customer inquires about order → API queries order status → Automatically responds with delivery progress

## Marketing Campaign Management

New product launch → Automatically update website → Send EDM → Social media promotion

## Online Course Platform:

Student inquires about course progress → API queries learning records → Automatically responds with completion percentage and next class time

Through API tools, AI assistants evolve from simple chatbots into intelligent assistants capable of actually executing business processes, significantly improving work efficiency and automation levels.

## Quick Create API Tool

### 1. Enter Tool Management Interface

First, navigate to the "AI Features" section from the left sidebar, then click "Tools". After entering the tools list page, click the "+ Add Tool" button in the upper right corner.

The screenshot shows a web-based application interface for managing tools. On the left is a sidebar with a tree view of categories: 'MaiGPT', 'AI 功能', 'AI 助理', '知識庫', '工具' (highlighted in blue), '爬蟲', '客服對話', '所有對話\*', '對話平台', '聯絡人', '內部問答', and '組織設定'. The main area is titled 'Tool Management' and lists 10 tools. Each tool entry includes columns for 'ID', '顯示名稱' (Display Name), '工具名稱' (Tool Name), '描述' (Description), '工具類型' (Tool Type), '最後更新時間' (Last Updated), and '操作' (Operations). The '操作' column contains icons for edit and delete. A blue callout bubble labeled '1' points to the top-right corner of the '操作' column of the first tool entry. In the top right corner of the main area, there is a blue button with a white plus sign and the text '+ 新增工具' (Add New Tool).

ID	顯示名稱	工具名稱	描述	工具類型	最後更新時間	操作
f7bb4b1e-a875-4efd-a...	逐字稿過濾器	-		MCP	2025-08-25 17:21:25	
cdb0b07c-5a59-4225-a...	【台帳】SRD 助理工具	-		MCP	2025-08-25 15:34:46	
a0fa38a4-9906-4d02-9...	Composio mcp for google calendar	google_calendar_retriever		MCP	2025-08-21 09:46:33	
1f496344-38a8-4ff1-97...	MCP for gmail	-		MCP	2025-08-14 16:46:34	
cd85cd2b-377a-442e-8...	麥阿駿	-		MCP	2025-08-28 16:46:53	
a0556c4a-faf2-4e88-80...	Finage	-		MCP	2025-08-12 10:40:43	
bb2a733e-a73e-4264-a...	霧淇淇隨行找	-		MCP	2025-08-20 18:16:57	
114334d7-b530-48a0-a...	MaiAgent for Calendar	-		MCP	2025-08-08 18:11:33	
9987cea5-97ba-462d-a...	supabase	-		MCP	2025-08-04 15:41:08	
7103e0a9-0159-4fc1-b...	Google Docs	-		MCP	2025-07-27 16:51:36	

共 10 條資料 1 10 條/頁

Click "+ Add Tool" to start creating

## 2. Select Tool Type

For tool type, select API.

The screenshot shows a '編輯工具' (Edit Tool) dialog box. A blue callout bubble with the number '2' points to the '工具類型' (Tool Type) dropdown menu. The menu is open, showing two options: 'API' (selected) and 'MCP'. Other options like 'SAP' and 'ERP' are visible but not selected. To the right of the dropdown, there is a field labeled '工具名稱' (Tool Name) containing the value 'google\_calendar\_retriever'. Below the dropdown, there is a '描述' (Description) input area with placeholder text '請輸入' (Please enter). At the bottom of the dialog, there are '取消' (Cancel) and '確認' (Confirm) buttons. The entire dialog has a light gray background with rounded corners.

## 3. Set Display Name

Set a clear display name for the tool, here set as **google calendar**.

編輯工具

\* 工具類型  
API

\* 顯示名稱 ⓘ  
google calendar

\* 工具名稱 ⓘ  
google\_calendar\_retriever

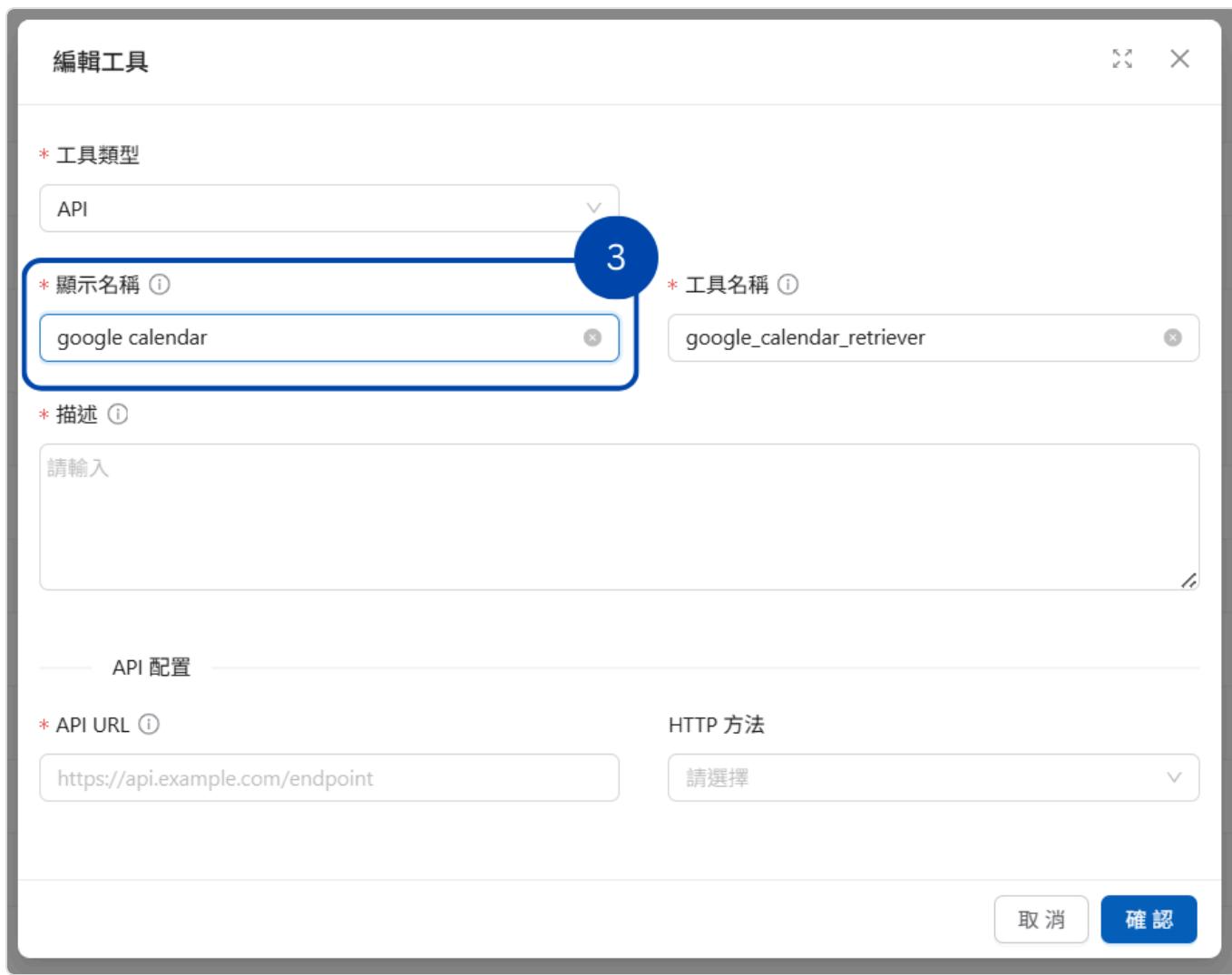
\* 描述 ⓘ  
請輸入

API 配置

\* API URL ⓘ  
https://api.example.com/endpoint

HTTP 方法  
請選擇

取消 確認



**Purpose:** This name will be displayed in the platform interface for all users to view.

**Recommendation:** Choose a name that clearly expresses the tool's main function for easy user understanding. This name has no strict format restrictions.

## 4. Set Tool Name

Next is the "Tool Name" field.

**Purpose:** This name is the unique identifier used by the AI assistant to internally call and identify this tool.

### Naming Rules (Important):

Must use English.

Can only contain:

Lowercase letters (a-z)

Uppercase letters (A-Z)

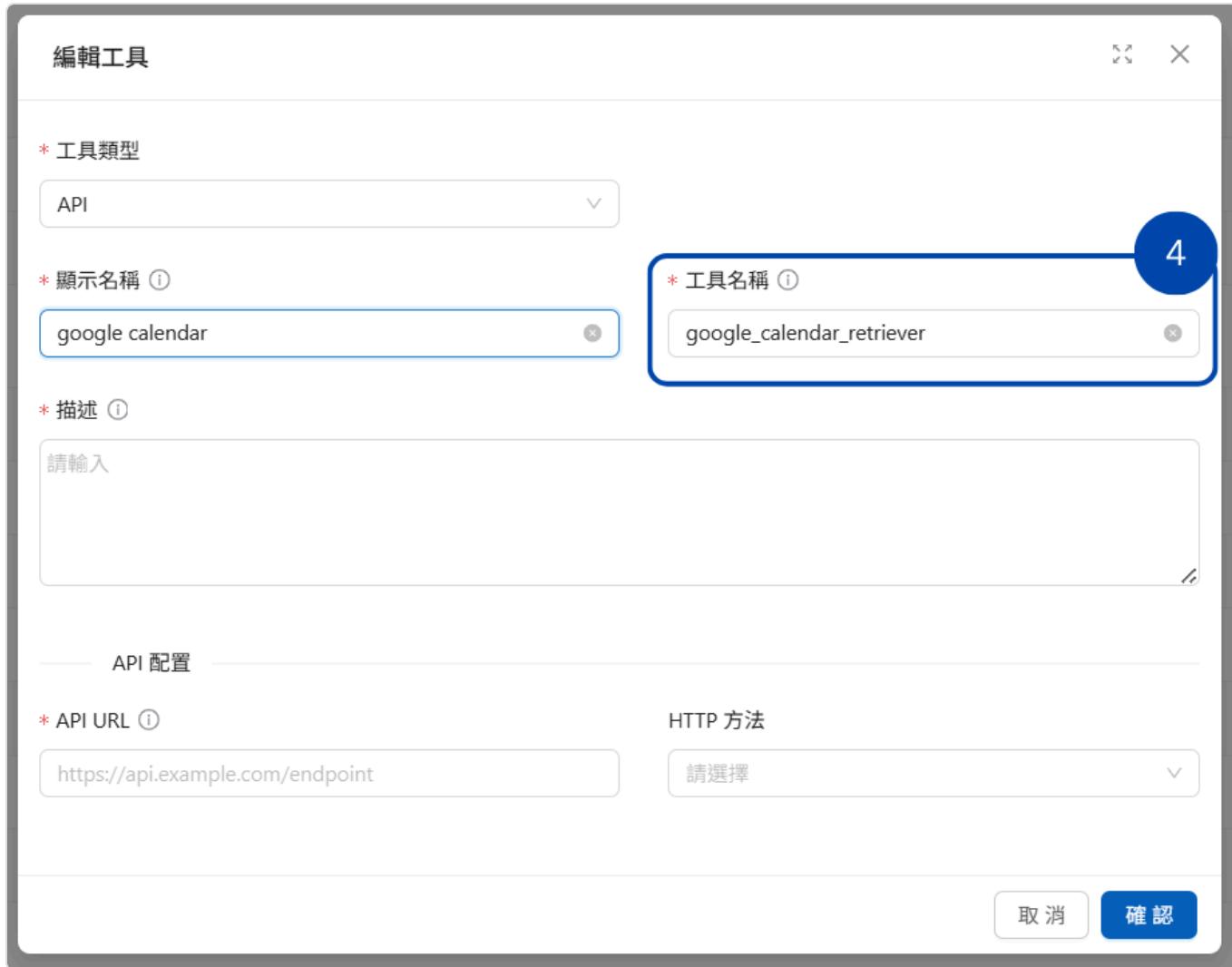
Numbers (0-9)

Underscore ( \_ )

Hyphen ( - )

**Example:** `get_weather_forecast`, `database-query-tool`

In the image below, set as `google_calendar_retriever`



API Tool Name Definition

## 5. Write Tool Description

In the "Tool Description" field, users can provide a clear and detailed tool description.

**Importance:** A good description helps the AI assistant more accurately understand:

The tool's function and purpose.

When this tool should be used.

How to interpret the tool's output results.

**Recommended Content:** Explain what the tool does, what it inputs, what it outputs, and any usage precautions.

編輯工具

\* 工具類型

API

\* 顯示名稱 ⓘ

5 Google calendar

\* 工具名稱 ⓘ

google\_calendar\_retriever

\* 描述 ⓘ

當用戶詢問具體的行程安排、時間可用性或需要管理日曆活動時，應調用 Google Calendar 工具。包括查詢特定日期的會議安排（「我明天有什麼會議？」）、檢查時間衝突（「週三下午 2 點有空嗎？」）、創建或修改行程（「幫我安排下週一的會議」）等。如果用戶只是討論時間管理概念或詢問一般性時間問題，則不需要調用此工具。主要是區分用戶是否需要存取真實的個人日曆數據。

API 配置

\* API URL ⓘ

https://api.example.com/endpoint

HTTP 方法

請選擇

取消 確認

Tool Description

## 6. API Configuration Detailed Settings

### a. API URL

Fill in the complete URL of the target API endpoint (including `http://` or `https://`).

Example: <https://api.opencalendar.org/data/2.5>

編輯工具

6

\* API URL ⓘ  
https://api.opencalendar.org/data/2.5

HTTP 方法  
請選擇

\* 標頭 (JSON) ⓘ  
{"Content-Type": "application/json"}

\* 參數結構 (JSON Schema) ⓘ  
{"type": "object", "properties": {...}}

取消 確認

## b. HTTP Method

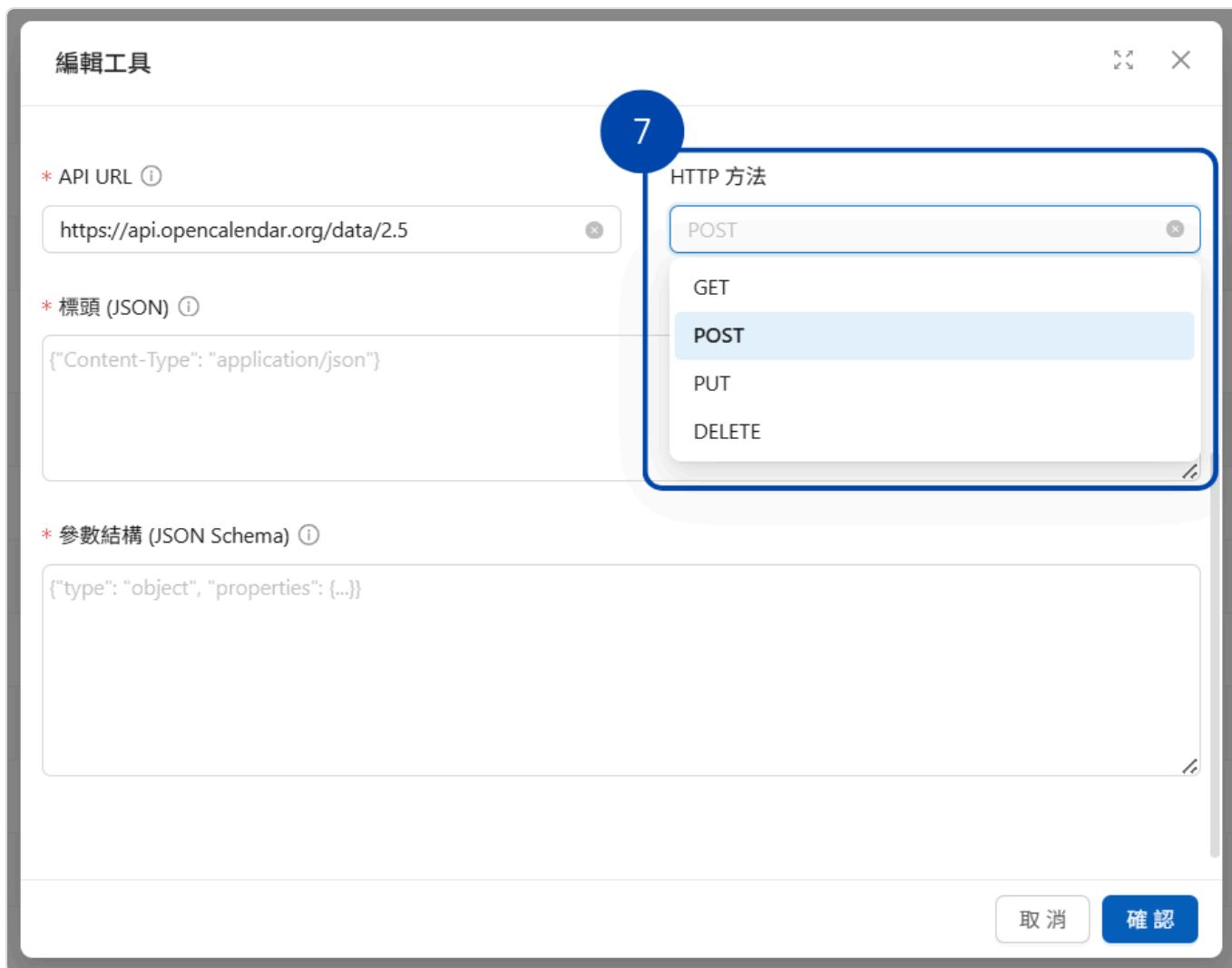
Select the HTTP verb required by the API service from the dropdown menu:

**GET** : Usually used to retrieve resources.

**POST** : Usually used to create new resources or submit data.

**PUT** : Usually used to completely replace or update resources.

**DELETE** : Usually used to delete resources.



### c. Headers

Headers are like the "**envelope**" of a letter, telling the receiver some important information before seeing the actual data content. **Without correct headers, API requests may fail authentication, or the receiver may not be able to properly parse the data.**

#### Common Uses:

Authentication (`Authorization`, `X-API-Key`)

Specify content type (`Content-Type`)

Specify accepted response format (`Accept`)

To add headers, you need to:

Click "**+ Add Header**" to define HTTP headers sent with the request.

**Format:** Must be a valid JSON object, where the Key is the header name and the Value is the header content (string).

**Example:**

```
{  
    "Content-Type": "application/json; charset=utf-8",  
    "Authorization": "Bearer {{SECRET_API_TOKEN}}",  
    "Accept": "application/vnd.github.v3+json"  
}
```

編輯工具

\* API URL ⓘ : //api.opencalendar.org/data/2.5

HTTP 方法: POST

\* 標頭 (JSON) ⓘ

```
"Content-Type": "application/json; charset=utf-8",  
"Authorization": "Bearer {{SECRET_API_TOKEN}}",  
"Accept": "application/vnd.github.v3+json"
```

\* 參數結構 (JSON Schema) ⓘ

```
{"type": "object", "properties": {...}}
```

取消 確認

Set necessary HTTP request headers

#### d. Parameters Schema

The **parameters schema** is like an "order form", telling the AI assistant what data can be requested from the API and how to request it.

**Core Setting:** Defines which parameters the AI assistant can or must provide when calling this tool (content to be passed to the system for processing), and the format of these parameters.

**Format:** Uses standard **JSON Schema** format.

**Key Elements:**

`type: "object"`: Indicates that parameters are an object.

`properties`: Defines the object for each parameter.

**Parameter Name** (e.g., `"search"`): The corresponding object contains details for that parameter.

`type`: The parameter's data type (`string`, `integer`, `number`, `boolean`, `array`, `object`).

`description`: Explanation for the AI assistant about the meaning of this parameter.

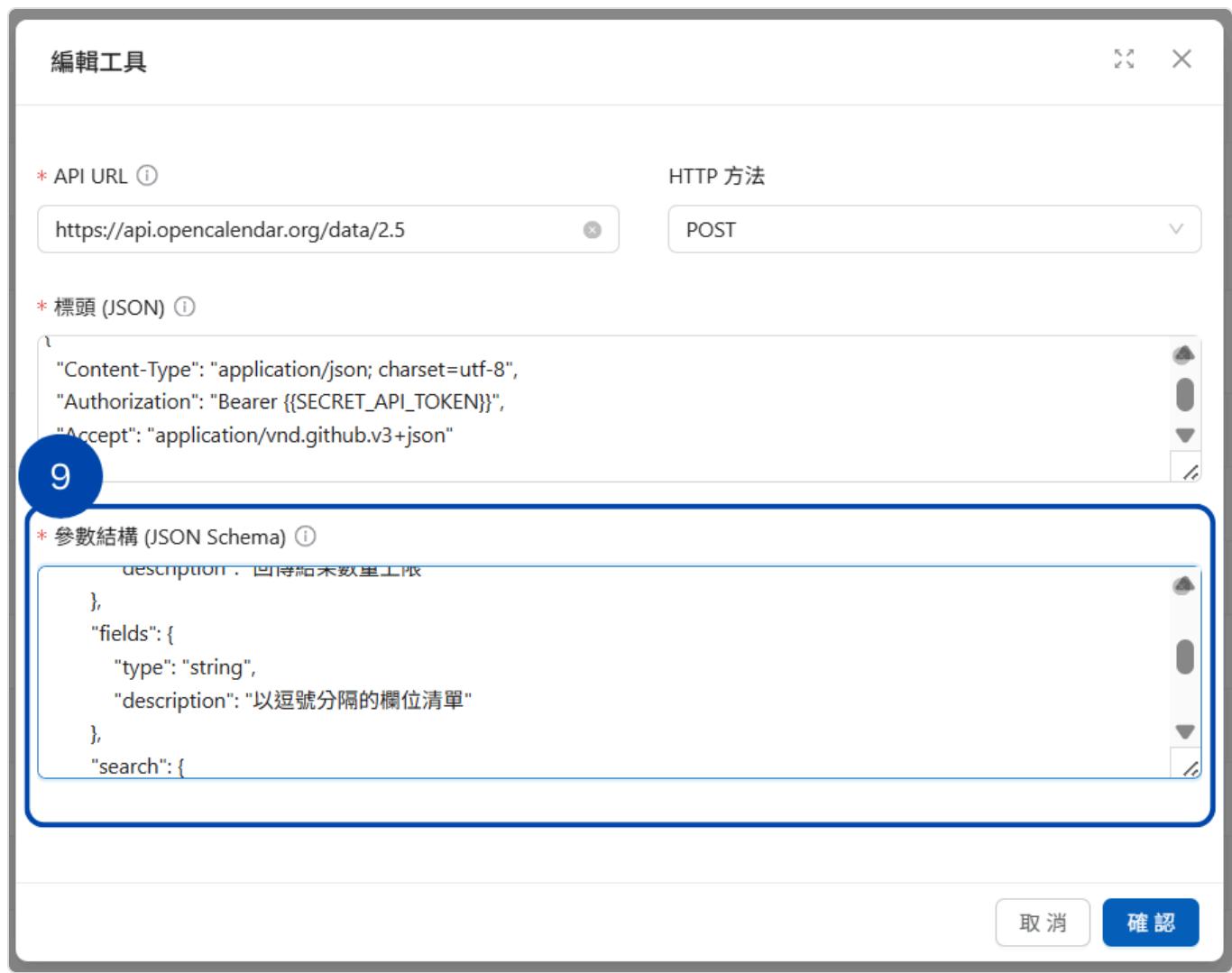
`default` (optional): Default value for the parameter.

`enum` (optional): If the parameter value can only be one of specific options, list them here.

`required`: An array containing the names of all **required** parameters.

**Example** (Video search tool):

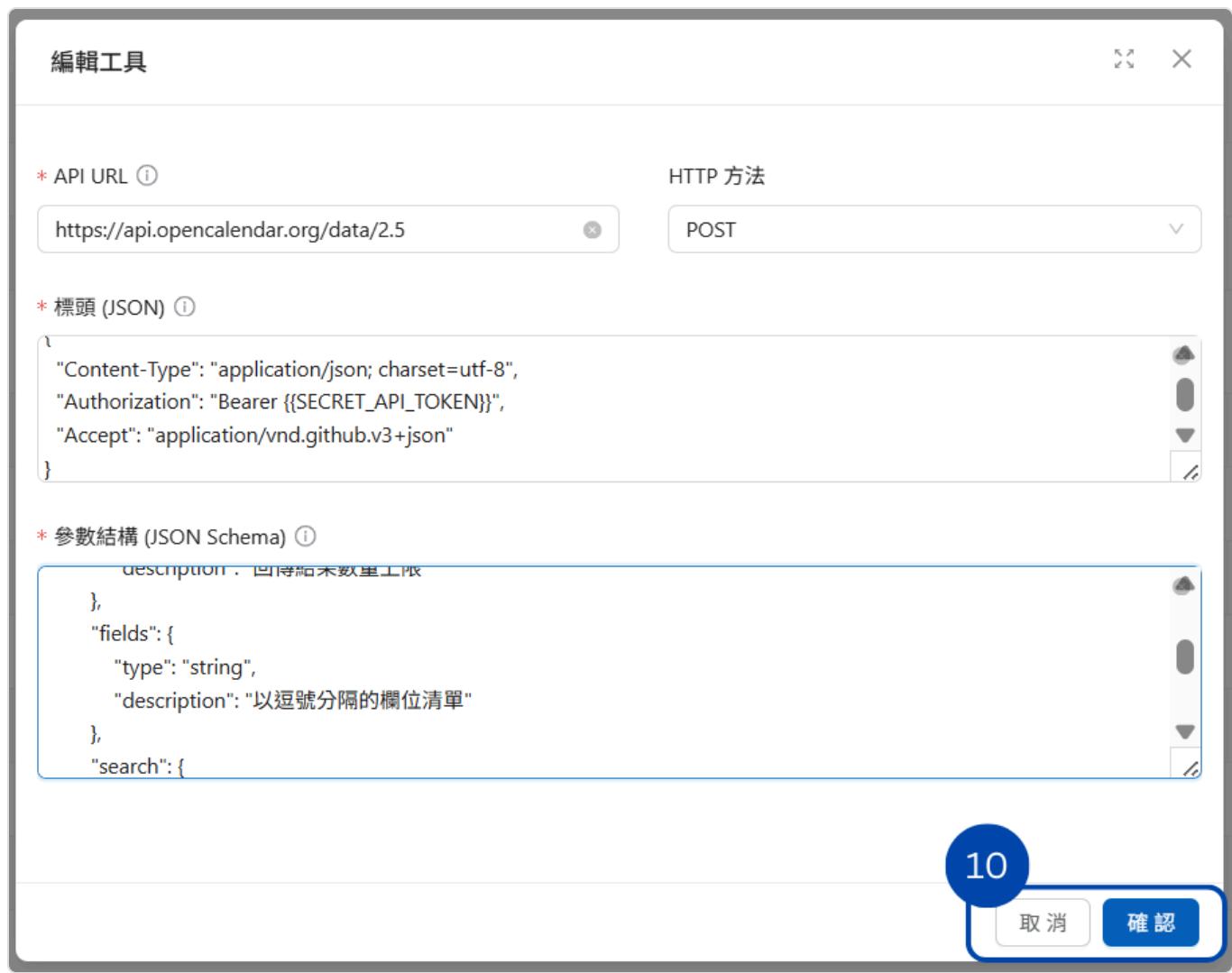
```
{
  "type": "object",
  "properties": {
    "limit": {
      "type": "integer",
      "minimum": 1,
      "description": "Maximum number of returned results"
    },
    "fields": {
      "type": "string",
      "description": "Comma-separated list of fields"
    },
    "search": {
      "type": "string",
      "description": "Search keywords"
    }
  },
  "required": ["search"]
}
```



Precisely define API parameters using JSON Schema

## 7. Save Tool

After confirming all settings are correct, scroll to the bottom of the page and click the "**Confirm**" button.  
Your new tool is now created!



## ⚠ Important Reminders

### Connection Testing

After creating a tool, it's recommended to first test whether the API works properly

You can use testing tools to verify tool functionality, such as:

POSTMAN

API testing platforms built by your enterprise

### Permission Management

Regularly check tool usage status and permission access status

# Built-in AI Image Generation Tool

## Feature Overview

The MaiAgent system integrates four top-tier AI image generation engines, providing comprehensive solutions from everyday creation to professional design. Simply check the settings to start generating images immediately.

Please refer to: [Configure Tools for AI Assistant](#)

## Complete Tool Comparison Table

Tool	Language Support	Core Features	Use Cases
Gemini 2.0	 Traditional Chinese + English	Contextual understanding, conversational editing	Everyday creation, Chinese language needs
GPT Image	 English	Professional quality, multi-round optimization	Brand design, professional use
DALL-E 3	 English	Rapid generation, concept visualization	Quick prototyping, supporting illustrations
Imagen 4.0	 English	Photorealistic quality, product rendering	Commercial photography, product showcases

## Actual Generation Examples

### Gemini Native - Everyday Creation Example

**Prompt:** "A cute orange cat sitting on a windowsill with sunlight streaming through the window onto it"

[Gemini Native Example](#)

**Features:** Perfect understanding of Chinese descriptions, warm and natural colors, suitable for everyday creative needs

### GPT Image - Professional Design Example

**Prompt:** "Professional logo design: minimalist coffee cup with transparent background"

[GPT Professional Example](#)

**Features:** Transparent background, refined lines, suitable for brand applications

## DALL-E 3 - Quick Concept Example

**Prompt:** "Quick concept sketch: futuristic city skyline with flying cars"

!DALL-E 3 Example

**Features:** Rapid generation, clear concepts, suitable for creative brainstorming

Google Imagen - Product Photography Example

**Prompt:** "Professional product photography: sleek smartphone with studio lighting"

!Google Imagen Example

**Features:** Photorealistic quality, professional lighting, commercial-grade output

## Usage Methods and Best Practices

### Basic Usage Syntax

Use Case	Example Command	Recommended Engine
Everyday Creation	Draw a cute puppy	Gemini Native
Professional Design	Design a modern minimalist logo with transparent background	GPT Image
Quick Prototyping	Quickly generate a concept image for a website homepage	DALL-E 3
Product Showcase	Create a professional product photography image	Google Imagen

### Multi-round Iterative Optimization (GPT Image)

```
Round 1: "Design a coffee shop logo"
Round 2: "Change the color to dark brown"
Round 3: "Add some steam effects"
Round 4: "Make it more minimalist"
```

### Image Reference Editing (Gemini Native)

"Based on this image, change the background to a beach scene"  
"Keep the person unchanged, only modify the clothing color"  
"Add some flowers to this scene"

## 🎯 Application Scenario Practical Guide

### Scenario 1: Social Media Content Creation

**Need:** Create images for Instagram posts

**Recommendation:** Gemini Native

**Example Command:** `Create a warm coffee shop scene suitable for IG posts`

### Scenario 2: Corporate Brand Design

**Need:** Design company logo and brand materials

**Recommendation:** GPT Image

**Example Command:** `Design a tech company logo, minimalist modern style, transparent background`

### Scenario 3: Product Display Images

**Need:** Product main images for e-commerce platforms

**Recommendation:** Google Imagen

**Example Command:** `Professional product shot of wireless headphones on white background`

### Scenario 4: Creative Ideation and Prototyping

**Need:** Quickly visualize creative concepts

**Recommendation:** DALL-E 3

**Example Command:** `Concept art for a mobile app interface design`

## ❓ Common Questions and Solutions

### Quality-Related Issues

**Q:** How to obtain the highest quality images?

**A:** Use GPT Image or Google Imagen, and provide detailed descriptions:

- Specific style requirements (e.g., "professional photography style")
- Detailed scene descriptions (lighting, angles, atmosphere)
- Clear quality requirements (e.g., "high resolution" "commercial quality")

**Q: Why doesn't the generated image match expectations?**

**A:** Suggestions for optimizing prompts:

-  Use specific rather than abstract descriptions
-  Specify clear artistic styles
-  Explain composition and perspective requirements
-  Describe color and lighting effects

## Functional Usage Issues

**Q: How to generate images with transparent backgrounds?**

**A:** Explicitly mention "transparent background" in the description:

Design a logo with transparent background  
Create an icon with transparent background

**Q: Can I modify already generated images?**

**A:** Yes! Use Gemini Native's image reference feature:

Based on this image above, change the sky to sunset colors  
Keep the composition unchanged, only modify the character's clothing

# Text to SQL Feature

## What is Text to SQL?

**Text to SQL** (also known as Text2SQL) is an intelligent tool that automatically converts **natural language questions** (everyday human language) into **SQL database query statements**. Simply put, it enables AI assistants to "**understand human language**" and directly operate databases.

For more information about Text2SQL, please see: [Technical Manual—Text to SQL](#)

Imagine you're a convenience store owner:

### Traditional approach:

You: "Help me check how many bottles of cola were sold yesterday"

Employee: "Boss, you need to teach me how to use the POS system to query..."

You: "Click here, select there, enter conditions..."

Requires hands-on teaching, which is time-consuming.

### With Text2SQL:

You: "Help me check how many bottles of cola were sold yesterday"

AI Employee: "Sure!"  (*automatically generates query method and calls database*) → "87 bottles of cola were sold yesterday" 

## Core Functions of Text to SQL

Natural language question → AI understanding and analysis → SQL query statement → Execute query → Return results

When you ask the AI assistant "Find yesterday's best-selling beverage," the AI assistant first analyzes your question, understands you're looking for a "beverage" that was the "best-selling" "yesterday," then generates SQL syntax to query the database, and finally tells you the result: "Coca-Cola."

## What Text to SQL Can Help AI Accomplish

## Specific Application Scenarios



Doctor asks: "Find today's diabetes patient appointments"  
AI responds: "There are 5 diabetes patients scheduled today:  
- Mr. Wang 10:00 Follow-up visit  
- Mrs. Lee 14:30 Follow-up examination  
- Miss Chen 16:00 Blood glucose monitoring"



Teacher asks: "How many students failed this exam?"  
AI responds: "This math exam:  
- Total students: 45  
- Failed: 8 (17.8%)  
- Student list for makeup exam has been compiled"



Store manager asks: "Compare monthly revenue of three branches"  
AI responds: "November branch revenue comparison:  
- Taipei Store: \$1,200,000 (↑15%)  
- Taichung Store: \$950,000 (↑8%)  
- Kaohsiung Store: \$800,000 (↓3%)"

## Advantages of Text to SQL

### ⚡ Efficiency Improvement

**Traditional approach:** Requires SQL expert to write queries → 30 minutes

**Text2SQL:** Natural language questions → 3 seconds

### 🎯 Lower Barrier to Entry

**No need** to learn complex SQL syntax

**No need** to memorize database structure

**Anyone** can query data

### 📱 Real-time Interaction

Get answers immediately after asking

Support for follow-up questions

Dynamic adjustment of query conditions

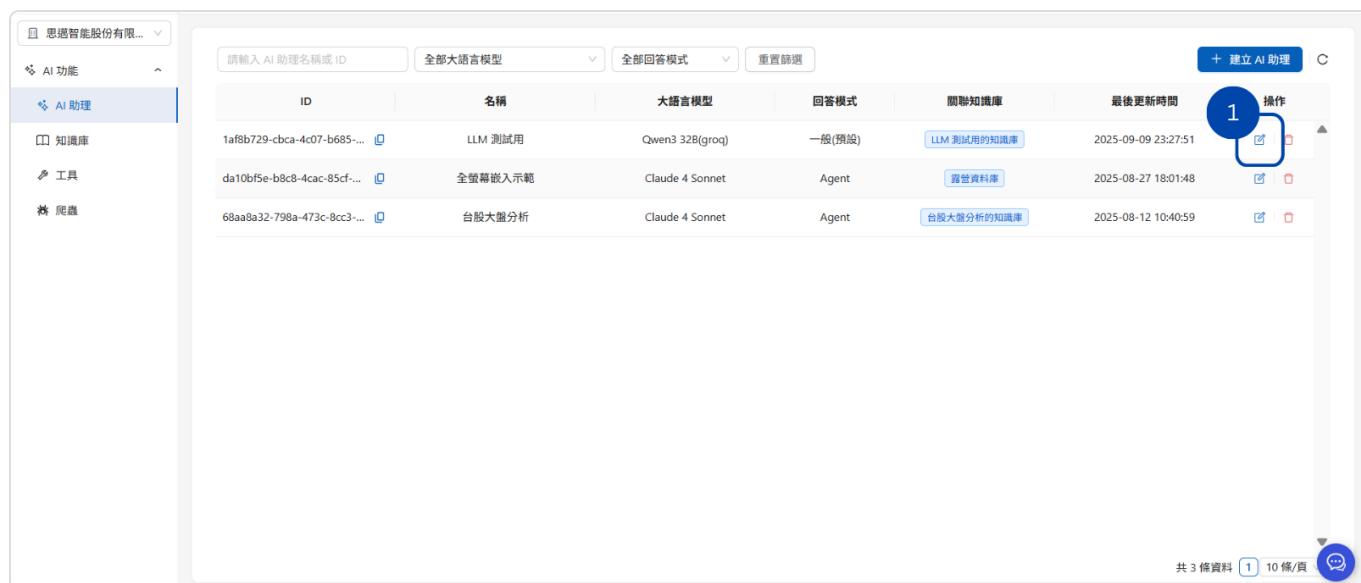
## How to Use Text to SQL Feature in MaiAgent

Before using, you need to prepare: Enterprise-associated database or Excel file (upload to knowledge base) If using a database, we recommend: Ensure clear data table structure Create appropriate indexes Maintain data quality

### 1. Enter AI Assistant Settings

Select the AI assistant you want to configure

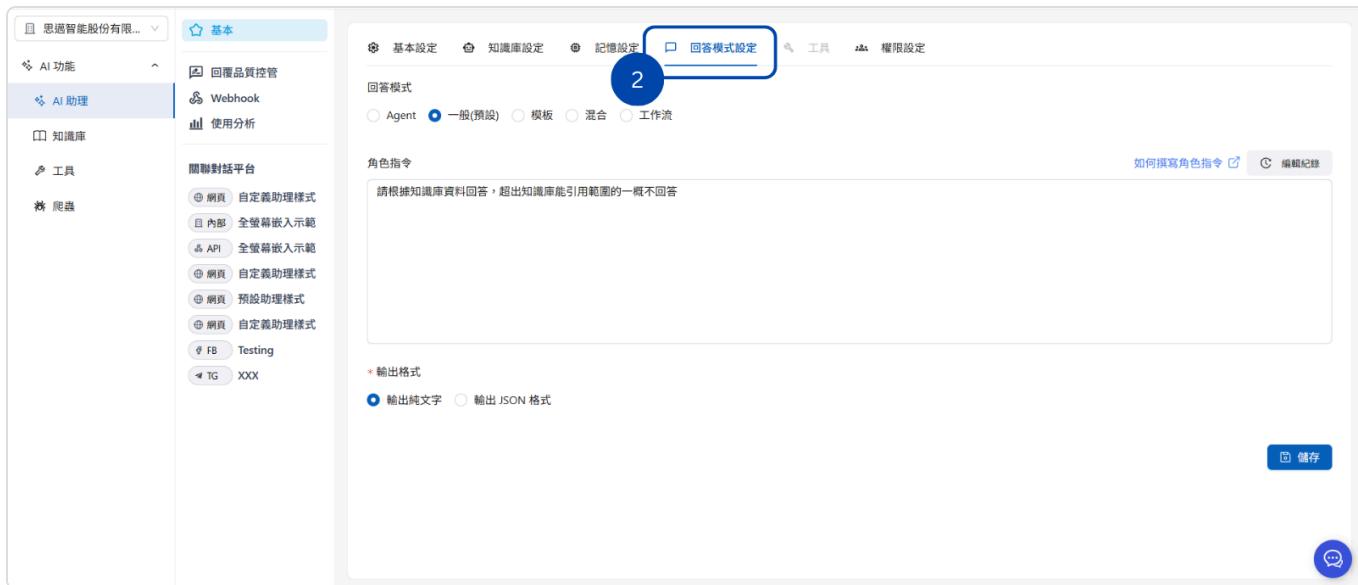
Switch to the response mode settings page



The screenshot shows the MaiAgent interface for managing AI assistants. On the left, there's a sidebar with a dropdown for company selection (思邁智能股份有限公司), followed by sections for AI functions, AI assistants (which is currently selected and highlighted in blue), knowledge bases, tools, and agents. The main area is a table listing three AI assistants:

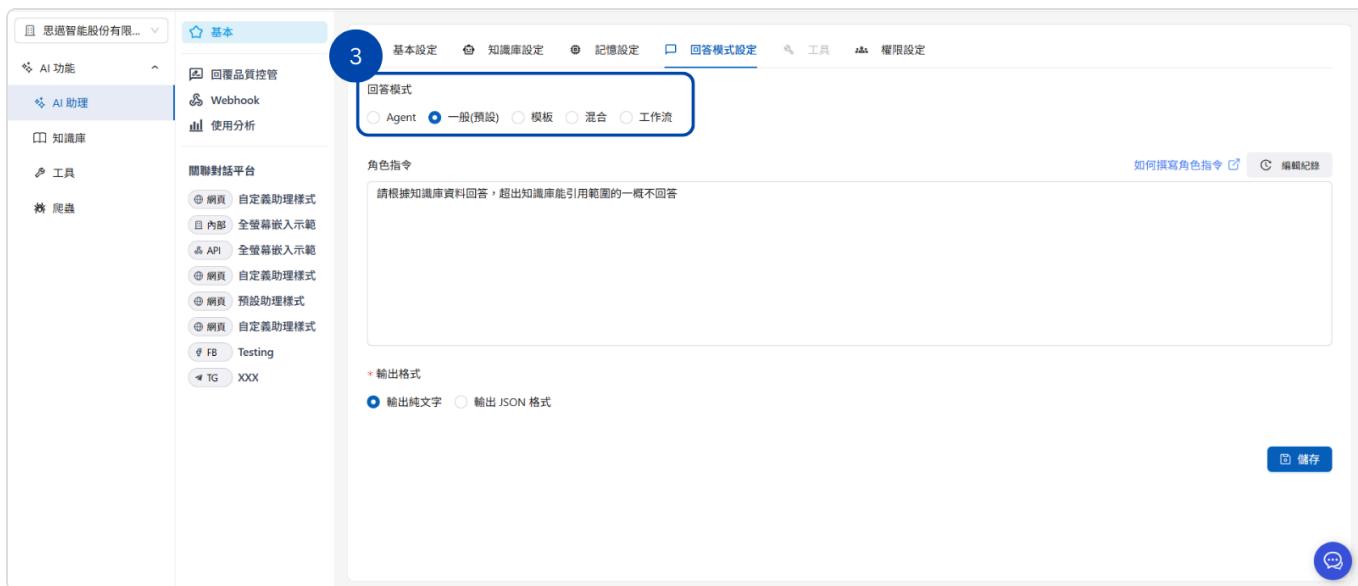
ID	名稱	大語言模型	回答模式	關聯知識庫	最後更新時間	操作
1af8b729-cbca-4c07-b685-...	LLM 測試用	Qwen3 32B(groq)	一般(預設)	LLM 測試用的知識庫	2025-09-09 23:27:51	
da10bf5e-b8c8-4cac-85cf-...	全螢幕嵌入示範	Claude 4 Sonnet	Agent	叢管資料庫	2025-08-27 18:01:48	
68aa8a32-798a-473c-8cc3-...	台股大盤分析	Claude 4 Sonnet	Agent	台股大盤分析的知識庫	2025-08-12 10:40:59	

A blue circle with the number '1' is drawn around the first AI assistant row, specifically highlighting the edit and delete icons. At the bottom right of the table area, there are buttons for '共 3 筆資料' (3 results), '10 條/頁' (10 items per page), and a message icon.



## 2. Switch AI Assistant's Response Mode to Agent Mode

You must switch to Agent mode, otherwise the AI assistant cannot use the Text to SQL feature. For detailed introduction of each response mode, please refer to: [Create AI Assistant](#)



## 3. Enter Enterprise Database URL

Use the dropdown menu to select the database service used within the enterprise

Enter the database service URL used by the enterprise to allow the MaiAgent system to connect and operate within the database

- MaiAgent supports: MySQL PostgreSQL Oracle DB Microsoft SQL Server (MSSQL) - The maiagent option applies Excel files you have uploaded in the MaiAgent knowledge base



Please ensure the URL format is correct and includes necessary connection information, such as: host name, port, database name, username, and password.

## MaiAgent

Please refer to: [Using MaiAgent Knowledge Base for Text to SQL](#)

## Microsoft SQL Server(MSSQL)

Connect to an existing MSSQL database by pasting the MSSQL database connection string

💡 Please note: Ensure the database URL is accessible by MaiAgent service

## MySQL

Connect to an existing MySQL database by pasting the MySQL database connection string

💡 Please note: Ensure the database URL is accessible by MaiAgent service



## Oracle

Connect to an existing Oracle database by pasting the Oracle database connection string

💡 Please note: Ensure the database URL is accessible by MaiAgent service

## PostgreSQL

Connect to an existing PostgreSQL database by pasting the PostgreSQL database connection string

💡 Please note: Ensure the database URL is accessible by MaiAgent service



## 4. Click Save to Preserve Settings



This way, the AI assistant can help you quickly query your inventory, employee information, etc., and compile well-organized reports and trends for you.

## Common Troubleshooting

---

**Connection failure:** Check database URL format and network connectivity

**Query error:** Confirm table names and column names are correct

**Insufficient permissions:** Check database user permission settings

**Slow response:** Check query complexity, consider adding indexes

**Text2SQL turns AI assistants into database experts, enabling anyone to use natural language to quickly gain business insights, dramatically improving the efficiency of data-driven decision-making!**

# Using MaiAgent Knowledge Base for Text to SQL

---

If you want your AI assistant to help analyze data in Excel or spreadsheet format, you can follow these steps to enable the AI assistant to generate statistical analysis results.

## Step 1: Switch AI Assistant to Agent Mode

---

Please refer to "[Create AI Assistant - Choose Appropriate Response Mode to Create Instructions](#)" to switch AI assistant mode

Agent mode grants the AI assistant the ability to use tools. In this mode, the AI assistant can understand the structure of spreadsheet data and use the Text-to-SQL tool for analysis.

Select MaiAgent in Agent mode. After switching, no changes are needed to the URL field below.

---

---

You must select the maiagent service and save the result, otherwise the text to SQL tool cannot be enabled

## Step 2: Upload Spreadsheet Files like CSV

---

### 1. Enter the knowledge base page and click edit operation

---

### 2. Upload files (.xls, .xlsx, .csv)

For detailed knowledge base file upload methods, please refer to: [Knowledge Base Overview - How to Upload Knowledge Base?](#)

You can download the sample file (100 items of food sales file.xlsx) for testing to experience the AI assistant's data analysis capabilities.

**Number of spreadsheet columns** and **Reranker retrieval segment count** are two completely independent configuration parameters that have no dependency or mutual influence on each other.

For Reranker introduction, please refer to: [Technical Manual - Reranker Model](#)

---

## File upload screen

Screen after upload completion

When the file appears in the knowledge base and the processing status shows "**Completed**" (as shown in the right image above), the system will automatically create a database, and the AI assistant can read your file to help you generate calculation and statistical results using SQL syntax.

⚠ Note: Text-to-SQL Q&A functionality cannot be used without uploaded data



## Table Format Notes

- [x] Each worksheet must contain only one table
- [x] The first row of the table must be the column names
- [x] To improve AI data retrieval accuracy and efficiency, it is recommended to annotate data formats after column names, such as: Price (int), Date (datetime)
- [x] If there are special formats (such as currency, percentage, etc.), they need to be uniformly formatted before conversion
- [x] Please ensure that data column names match the actual content and use the correct data types

## Step 3: Converse with AI Assistant

After completing the above steps, you can enter the AI assistant conversation page and directly tell the AI assistant your needs in natural language, just like discussing with another person.

For AI assistant conversation interface, please refer to: [Choose Integration Platform](#), and select the most suitable conversation platform according to your needs.

## Data Analysis

The Text to SQL tool can help you analyze data in spreadsheets, for example: "Help me find the best-selling dairy products from last year"

---

When you make a request, the AI assistant will automatically invoke the Text-to-SQL tool.

This tool acts like a translator, converting what you say into SQL syntax that computers understand, allowing the AI assistant to extract data from the database.

The AI assistant will automatically add conditional judgments, sorting criteria, and other query restrictions to convert your needs into more complete query instructions.

**AI Assistant's Thinking Query:** Find the best-selling dairy products from last year, sorted in descending order by sales quantity. Automatically adds descending order conditions to make results better match your needs.

**AI Assistant's Response (click on tool response to view):**

---

---

## Result

The AI assistant found all sales data for "dairy products" and other field data for those items.

Each row represents one data record, including: Product ID, Product Name, Product Category, Sales Amount, Sales Quantity.....

Based on this data, the AI assistant determined that the best-selling dairy product is "cheese," with a sales quantity of 110 and sales amount of 40,150 yuan.

## Report Creation (Canvas Mode)

The Text to SQL tool can also help you create beautiful reports. This feature requires enabling Canvas mode:

Go to "AI Assistant Settings Page > Response Mode Settings" and find **Agent Mode**

---

---

Change Agent mode from normal mode to **Canvas Mode**

---

After saving the settings, you can converse with the AI assistant, for example: "Please help me generate a visualized revenue report after statistics"

---

**AI Assistant's Thinking Query:** Calculate revenue statistics for each product in the food company, including total revenue, average revenue, revenue standard deviation, revenue distribution ranges,

revenue proportion by category, and other statistical indicators. Automatically generates calculation results needed for reports to better match your needs.

#### AI Assistant's Response (click on tool response to view):

```
[('分類營收占比-主食', '10.72%'), ('分類營收占比-乳製品', '11.97%'), ('分類營收占比-冷凍', '9.06%'), ('分類營收占比-罐頭', '10.25%'), ('分類營收占比-肉類', '13.23%'), ('分類營收占比-蔬果', '13.34%'), ('分類營收占比-調料', '4.51%'), ('分類營收占比-零食', '14.53%'), ('分類營收占比-飲料', '12.40%'), ('商品總數', '100'), ('平均營收', '19546.06'), ('最低營收', '1400'), ('最高營收', '63364'), ('營收標準差', '15736.83'), ('總營收', '1954606')]
```

#### Result

The AI assistant obtains all automatically calculated statistical item results from the tool and returns them.

The AI assistant uses this data as the basis for visualization and creates an interactive report screen using Canvas.

Click on the "Use Canvas" box to view the screen content

---

The report display screen is shown below. You can:

Switch between viewing original code or screen

Switch report content according to the statistical category you want to view (this varies depending on each AI assistant's output)

---

When switching to other categories, you can view the category revenue proportion pie chart and distribution analysis bar chart:

---

---

#### Conclusion

Using the MaiAgent Text to SQL tool, you can quickly enable the AI assistant to help you analyze spreadsheet content and generate beautiful reports. Start experiencing now and let the AI assistant become your data analysis helper!

**Additional Tips** Data quality is important: Ensure your spreadsheet data is clean and correct, as this will directly affect the accuracy of the AI assistant's analysis results. Ensure data you don't want to share with AI is properly deleted: Hidden data in spreadsheets can still be normally parsed by the knowledge base and provided to the AI assistant, so data you don't want exposed to the AI assistant cannot be just hidden but must be actually deleted. Try different questions: Through different questioning methods, you can uncover more valuable information from the data. Make good use of Canvas mode: Canvas mode allows you to easily create various visualization reports and present data analysis results more intuitively.

# Using Supabase for Text to SQL

---

## What is Supabase?

Supabase is an open-source platform service designed to simplify the development workflow of modern applications. Its core features include:

**Database:** Can store various types of data.

**Real-time Updates:** Your application is immediately notified when data changes.

**Account Management:** Manages user accounts and passwords for you.

**Built-in Authentication Mechanism:** Built-in authentication mechanism simplifies user identity management processes and provides multiple authentication methods.

**Auto-generated API (i.e., data access paths):** Allows you to retrieve data from the database in a simple way.

## What are the benefits of integrating Supabase?

**Cross-query multiple reports:** Supabase supports multiple tables that are interrelated, allowing queries from value A in report A to find its relationship with report B

**Create indexes to improve query efficiency:** You can create indexes for frequently queried content, allowing the AI assistant to find the content you need more precisely

## Create Your Supabase

### 1. Create a Supabase Account

First, visit the [Supabase official website](#) and click "Sign in Start your project".

If you haven't registered yet, please register an account first to proceed with the following steps

---

After logging in, you can create a new organization or use an existing organization for operations. Within the organization, create a project - each project will have its own independent database.

---

---

### 2. Enter the Database Page

After entering the project, click on Database > Tables in the left navigation menu to add data

---

---

## Create a New Table

Click "New Table" to create a new table and name it:

---

---

Supabase provides multiple ways to create new tables:

---

**Manually add columns:** Suitable for designing table structure from scratch. You can add columns one by one and set data type, default value, etc. for each column.

**Import .csv/.tsv or plain text:** Suitable for quickly creating tables, especially when you already have existing data.

### Notes:

The first row of a plain text file must be the column names, with columns separated by commas (CSV) or tabs (TSV, which is the space size when pressing the Tab key on the keyboard).

Here, choose to import data: Click "[Import data from CSV](#)" and paste a tab-separated text file. Scroll down to see the results formatted as a table. After import is complete, click "Save"

---

Choose import method

---

Import plain text

---

Preview results

## Primary Key

After import is complete, you will be redirected to the settings page. At this point, you must specify a primary key. The primary key is like an ID number, serving as a unique value to identify each piece of data. Here, we choose the customer number as the primary key.

---

## Foreign Key

Scrolling down, you can see the Foreign key designation. A Foreign Key is like an address that can correspond to the source location of this data or other more detailed information.

---

Suppose we have two tables: "Customers" table and "Orders" table.

### **Customers Table:**

CustomerID - Primary Key

CustomerName

Phone

Address

### **Orders Table:**

OrderID - Primary Key

CustomerID - Foreign Key (references CustomerID in Customers table)

OrderDate

TotalAmount

In this example, "CustomerID" in the "Orders" table is a foreign key that references the primary key "CustomerID" in the "Customers" table. Through this foreign key, we can identify which customer placed each order.

In this example, the foreign key should be placed in the Order Table: Relationship Direction: One customer → can have multiple orders (one-to-many relationship) One order → belongs to only one customer Foreign Key Principle: > Foreign keys should be placed on the "many" side Therefore:  Set customer\_id (foreign key) in the Order Table, as it corresponds to the "many" side in the one-to-many relationship  Customer Table doesn't need to store order information

Therefore, in the Order Table, we set up a link where Customer ID in the Customer Table corresponds to Customer ID in the Order Table.

After the relationship is complete, click "Save" to establish the database relationship.

## **3. Creation Complete**

After the table is created, you have a complete database and can query data within the database using SQL syntax!

## **How to Create a Supabase Tool**

To use the Supabase tool in MaiAgent, you need to create it as an MCP tool so that the AI assistant can use Supabase functionality:

For tool introduction, please refer to: [Tool Function Overview](#)

## Create a Server on the MCP Service Platform and Connect with Supabase Service

For how to connect MCP tools, please refer to: [Remote MCP Service Overview](#). Currently, only the [Composio platform](#) supports Supabase platform connection

### Enable Available Functions in Composio

When connecting to Composio, please enable basic database operations such as add, delete, query, etc.

Composio has pre-selected basic content in Important, you don't need to configure it additionally, just make sure the Important option is checked

## Add the Built Supabase Tool to the Available Tools List

For how to create MCP tools, please refer to: [Creating MCP Tools](#)

### Supabase Tool Connection URL

After creating the server service on the MCP service platform, please process the URL as follows:

Original URL (obtained from MCP Server):\

[https://backend.composio.dev/v3/mcp/12345678/mcp?include\\_composio\\_helper\\_actions=true](https://backend.composio.dev/v3/mcp/12345678/mcp?include_composio_helper_actions=true)

Delete "[?include\\_composio\\_helper\\_actions=true](#)" directly

New URL (to be pasted on the MaiAgent tools page):\

<https://backend.composio.dev/v3/mcp/12345678/mcp>

Please be sure to delete the above content, otherwise the AI assistant will not be able to use the supabase tool correctly

After the tool is created, please go to the AI assistant settings and add the Supabase tool to the assistant's available tools list:

Please click Save on the tool usage page, otherwise the AI assistant still cannot use the Supabase tool

## Effects of Using the Supabase Tool

Through the MaiAgent AI assistant combined with the Supabase tool, you only need to use everyday language to describe the data you want to query, and Supabase will automatically generate the corresponding SQL syntax and extract the required information from the relational database.

### Example Database

#### 1. Customers Table (Customer Information)

Column Name	Primary Key	Required	Description
CustomerID	✓	✓	Customer unique identifier
CustomerName	✗	✗	Customer company or personal name
CustomerType	✗	✗	Customer classification (e.g., retailer, restaurant, distributor)
ContactName	✗	✗	Primary contact name
Phone	✗	✗	Contact phone number
Email	✗	✗	Email address
Address	✗	✗	Customer address
Region	✗	✗	Geographic region (e.g., North, South)
CustomerLevel	✗	✗	Customer importance level (A, B, C tier)

 Primary Key: CustomerID

 Foreign Key Relationships: None

 2. Orders Table (Order Information)

Column Name	Primary Key	Required	Description
OrderID	✓	✓	Order unique identifier
CustomerID	✗	✗	Links to Customers table
OrderDate	✗	✗	Order creation date
DeliveryDate	✗	✗	Expected or actual delivery date
PaymentMethod	✗	✗	Payment method (cash, credit card, wire transfer)
OrderStatus	✗	✗	Order processing status
TotalAmount	✗	✗	Order total amount (numeric type)
ShippingFee	✗	✗	Shipping cost

🔑 Primary Key: OrderID

🔗 Foreign Key Relationships:

CustomerID → Customers.CustomerID (CustomerID in Orders corresponds to CustomerID in the Customer table)

### 🛍️ 3. Products Table (Product Information)

Column Name	Primary Key	Required	Description
ProductID	✓	✓	Product unique identifier
ProductName	✗	✗	Product name
Description	✗	✗	Detailed product description
Category	✗	✗	Product category
Brand	✗	✗	Product brand
Size	✗	✗	Product specification or size
Cost	✗	✗	Product cost (numeric type)
Price	✗	✗	Product selling price (numeric type)

Column Name	Primary Key	Required	Description
StockQuantity	✗	✗	Current stock quantity (numeric type)

🔑 Primary Key: `ProductID`

🔗 Foreign Key Relationships: None

## Scenario 1: Tracking Incomplete Orders

**Database State:** The `Orders` table has two incomplete orders, `OR003` and `OR004`.

---

**Natural Language Input:** In the AI assistant's Q&A, you only need to enter: "Please tell me what incomplete orders there are". The AI assistant automatically invokes the tool and generates an SQL structured query statement.

---

**Supabase Automatic Query:** The AI assistant will automatically invoke the Supabase tool, converting your natural language into an SQL query statement, for example:

---

Combining the query results with the AI assistant's analysis, the AI assistant will respond with the following order content, sorted by priority:

---

Through the collaboration of the Supabase tool and the AI assistant, you can easily track incomplete orders and receive analysis and sorting suggestions provided by the AI assistant to process orders more effectively and improve customer satisfaction.

## Scenario 2: Querying Customer Contact Information for Incomplete Orders

OR003 is an order still being processed, the customer is CU003, and the contact person is **Huang Purchasing**

---

**Natural Language Input:** In the AI assistant's Q&A, enter: "For orders still being processed, who should I contact". The AI assistant automatically invokes the tool and generates an SQL structured query statement.

---

**Supabase Automatic Corresponding Query:** You can see that although the conversation content with the AI assistant all relates to the order table, through the set foreign key correspondence relationship,

supabase can know that the `Customer ID` here corresponds to the `ID` query in the `Customers` table, so the returned content is from the `Customers` table.

---

**AI Assistant Response:** The AI assistant then comprehensively analyzes and responds with the correct contact information and other contact methods

---

Through the Supabase tool, you can fully utilize the table correspondence relationships in the database, easily extract information from multiple related tables, and receive a list of customer names provided by the AI assistant. The correspondence relationships between tables and clear definitions ensure data relevance and consistency, making query results more reliable.

## Additional Notes:

You can adjust the natural language input according to actual needs, for example: "Please tell me what incomplete orders there are today", "Please tell me what incomplete orders VIP customers have", etc. The Supabase tool can accurately parse and execute queries.

The AI assistant can further integrate other information, such as: inventory status, logistics information, etc., to provide more comprehensive order analysis.

The tool can only call content you store in the database. If you have analysis needs, please be sure to upload the data to the database before starting analysis.

# Configure Tools for AI Assistant

Tools you've created can now be selected in AI Assistant settings, giving your AI Assistant more powerful capabilities. This guide will explain how to configure the tools you've created for specific AI Assistants.

## Configure Tools

### 1. Access AI Assistant Settings

First, navigate to the "[AI Features](#)" section from the left sidebar, then click on "[AI Assistants](#)". This will display a list of all AI Assistants created in your account.



AI Assistant list page

Find the AI Assistant you want to configure tools for

### 2. Select the AI Assistant to Configure

In the AI Assistant list, find the assistant you want to configure tools for and click the "[Edit](#)" button to enter that assistant's detailed settings page.



Edit AI Assistant button

Enter the settings page for a specific AI Assistant

### 3. Switch AI Assistant's Q&A Mode

**Important prerequisite:** Only AI Assistants set to Agent mode can use tools. If your AI Assistant is in another mode (for example: General (default) Q&A mode), you cannot configure or use tools for it.

On the AI Assistant's settings page, switch to the "[Q&A Mode Settings](#)" page option.

**Check:** Verify whether the currently selected mode is "[Agent mode](#)"

**Change:** If not currently in Agent mode, please **switch** it to Agent mode.



Select Agent mode

Ensure the AI Assistant is set to Agent mode to use tools

### 4. Switch to Tool Configuration Page

On the AI Assistant's settings page, find the " Tools" page option.



### Tools page in AI Assistant settings

Find the tool configuration page

## 5. Select Tools to Enable

On this tool configuration page, click the " Select Tools" button in the upper right corner, which will open a list of pre-built tools, and perform the following operations.

#### Operations:

Browse the list and find the tools you want this AI Assistant to be able to use.

Check the checkboxes next to the tools you want to enable.

You can select any number of tools based on the AI Assistant's tasks and requirements.

You can select MaiAgent built-in tools or tools you've defined yourself



### Direct tool selection interface

Directly check the tools you want this AI Assistant to use

Tip: Please ensure you only configure tools for the AI Assistant that it actually needs and is authorized to use. Configuring too many irrelevant tools may affect the AI's judgment accuracy and response efficiency.

## 6. Review Selected Tools

After completing the selection, you can confirm the tools configured for the AI Assistant again to ensure the correct tools have been configured for this AI Assistant.



### Overview of selected tools

Confirm that the correct tools have been configured for the AI Assistant

## 7. Save AI Assistant Settings

After completing tool selection, **please be sure to remember** to click the " Save" button to save the changes you made to the AI Assistant settings.



### Save AI Assistant settings button

Click "Save" to apply tool configuration changes

## Configure MaiAgent Built-in Tools

MaiAgent has four built-in AI image generation tools. You can apply them to AI Assistants according to your needs without additional setup:

For a comparison of the four tools, please refer to: [MaiAgent Built-in AI Image Generation Tools](#)

---

**Now, your selected AI Assistant has the ability to use these enabled tools. When interacting with that assistant, if relevant scenarios are triggered, the AI will attempt to call these tools to complete tasks or obtain information.**

## Build Enterprise Knowledge Base

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# Knowledge Base Overview

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## What is a Knowledge Base?

After creating an AI assistant, the next step is to set up the **Knowledge Base**, which serves as the data source for the AI assistant's responses.

How the Knowledge Base works:

---

Knowledge Base Operation Diagram

You can think of the Knowledge Base as an open-book exam. The AI assistant will find the most relevant content from the Knowledge Base to use as the basis for its answers.

Although the Knowledge Base can store large amounts of data, it is recommended to upload content that is highly relevant to the assistant's tasks. If the content is irrelevant, current retrieval technology may still retrieve unrelated information as response context, leading to inaccurate answers.

## What Can a Knowledge Base Do?

With the following features of the Knowledge Base, you can:

### Tag Management for Documents

You can add multiple tags to each document to create a systematic classification structure

**Example:** Add tags like `#tent #beginner #setup-guide` to the "Tent Manual"

### Selective Document Access Permissions

You can set different document access permissions based on user identity to implement differentiated services

**Example:** Product price lists are only available in VIP member conversations, while cost data is only available in internal conversations

### Create FAQs

You can organize common questions into a standard Q&A set to ensure consistency and completeness of responses

**Example:** "How long is the tent warranty?" → Standard answer: "We provide a 3-year warranty service"

## Pass Document Metadata

You can add detailed information such as version, update date, and applicable scope to documents for easier future maintenance

**Example:** Document version v2.1, update date 2024/11/28, applicable product "Mountain Series Tent"

## Search Testing

You can test retrieval results for different questions to verify whether the AI finds the correct data fragments

**Example:** Input "tent setup steps" → Check if the AI finds the correct setup guide fragments

## How to Upload to the Knowledge Base?

Navigate to "[AI Features](#)" in the left sidebar, then "[AI Assistant](#)", select which AI assistant you want to create a Knowledge Base for, and click the "[Actions](#)" icon on the right.

Navigate to "[AI Features > AI Assistant > Knowledge Base](#)" in the left sidebar, click the blue "[Upload File](#)" button in the upper right corner, and upload the data you want the AI assistant to know.

Different plans provide different Knowledge Base storage capacities. If your files are large or you have a lot of data, the system may need some time to process after uploading.

You can check the processing progress in the "[Processing Status](#)" field.

Currently supported file types in the Knowledge Base:  
Spreadsheet documents: .xls, .xlsx, .csv, .ods  
Word processing documents: .doc, .docx, .odt, .pdf, .md, .txt  
Presentation documents: .ppt, .pptx, .odp  
Web documents: .html, .htm  
Data formats: .json, .jsonl  
Audio files: .wav, .mp3

## View Data

### Data Fragment Description

When data is uploaded to the Knowledge Base, it is divided into fragments. This approach has the following benefits:

**Improved retrieval accuracy:** Smaller fragments more precisely match queries, avoiding irrelevant content interference

**Optimized response speed:** Faster processing with reduced computational resource consumption

**Enhanced content relevance:** Each fragment focuses on a single topic, improving targeting

**Easier maintenance management:** Easier to update, track, and control quality

**Compliant with AI model limitations:** Avoids exceeding input length limits, ensuring information integrity

## Edit and View Fragment Content

You can view the segmented content of your documents:

Enter the document page of the Knowledge Base and click "**Edit**"

To view segmented content, click on the fragment you want to view

The screen will display the complete content of this fragment in Markdown format.

---

---

## Edit Original Document

Click "**View Document**" on the edit page

---

Enter the edit page, where the text box will display the Markdown format of the document

You can edit your original document in the text box. All file formats can be edited using this method. After completion, click "**Save**" to preserve your edits.

---

---

Data Management Reminder It is recommended to back up important content before editing. After editing the original document, the system will re-segment the fragments

# How to Create a Knowledge Base: Basic Setup

---

## Basic Setup

### General Information

You can define the name of your knowledge base and add a description on the following page:

---

### Retrieval Chunks

The number of retrieval chunks represents the maximum number of data chunks the AI assistant will reference when answering. The system default is "12", meaning the AI assistant will retrieve the 12 most relevant chunks for each response.

Therefore, you can increase or decrease the number of retrieval chunks to adjust the amount of information the AI assistant references when answering.

### What is a Parser?

A Parser allows the system to "understand" the content within PDF documents, making it searchable, editable, or convertible to other formats.

When uploading PDF or Word format files, the parser provides three options:

MaiAgent Parser (default)

MaiAgent Parser (Online)

MaiAgent Parser (OCR beta)

The system currently uses MaiAgent Parser by default, which is particularly suitable for extracting structured data from complex professional documents for AI system analysis.

To understand the differences between the three parsers, please refer to: [Technical Manual - Parser Tool](#)

If problems occur during data parsing, you can also click the [Reparse] icon to have the parser reorganize the data.

The screenshot shows the MaiAgent AI Knowledge Base interface. On the left, there's a sidebar with navigation links like 'AI 功能', 'AI 助理' (selected), '工具', '客服對話', '所有對話', '對話平台', '內部問答', and '組織設定'. The main area has tabs for '文件' (selected), 'FAQ 常見問題', and '搜尋測試'. Below is a table listing documents:

ID	檔案名稱	檔案類型	檔案大小	處理狀態	解析器	建立時間	操作
415ecbf6-5f72...	如何建立FAQ.pdf	pdf	659.89 KB	完成	MaiAgent Parser (預設)	2025-04-25 10:57:29	<input type="radio"/> <input checked="" type="checkbox"/> <input type="button"/>
ab87192c-9ba...	如何建立AI助理.pdf	pdf	1.29 MB	完成	MaiAgent Parser (預設) MaiAgent Parser (Online) MaiAgent Parser (OCR beta)	2025-04-25 10:57:29	<input type="radio"/> <input checked="" type="checkbox"/> <input type="button"/>
dd3f79ef-0835...	如何建立知識庫.pdf	pdf	1018.96 KB	完成		2025-04-25 10:57:29	<input type="radio"/> <input checked="" type="checkbox"/> <input type="button"/>

At the bottom right, there are buttons for '上傳檔案' (Upload file) and '共 3 筆資料 1 / 10 條/頁' (3 items total, 1 page).

## Retrieval Model Settings

In the knowledge base settings, you can select the Embedding model and Reranker model you wish to use.

The screenshot shows the 'Basic' settings for the knowledge base. The sidebar includes 'AI 功能', 'AI 助理', '知識庫' (selected), '工具', '客服對話', '內部問答', and '組織設定'. The main panel has tabs for '一般資訊', '檢索模型設定' (selected), and '關聯 AI 助理'. Under '檢索模型設定':

- \* Embedding 模型: Cohere Embed V4.0 (Cohere)
- Reranker 設定: A toggle switch is turned on, labeled '啟用搜尋結果重排序 (Reranking)'.
- \* Reranker 模型: Cohere Rerank v3.5 (Cohere)

At the bottom right are '取消' (Cancel) and '保存' (Save) buttons.

## Embedding Model

Embedding is like translating human language into "numerical language" that AI can understand, allowing computers to comprehend the true meaning of text. This process is called "vectorization". Different Embedding models have different characteristics, such as languages they excel at processing and supported deployment environments. Different model settings within the knowledge base can be

used to adjust the vectorization processing effect when knowledge base documents are uploaded. You can select the most suitable Embedding model for different scenarios.

You can freely choose from multiple Embedding models:

To understand the differences between Embedding models, please refer to: [Technical Manual - Embedding Models](#)

The screenshot shows a user interface for managing search models. On the left, there's a sidebar with a 'Basic' tab selected, containing links for 'Label Management', 'File', 'FAQ', and 'Search Test'. The main area has tabs for 'General Information', 'Search Model Settings' (which is active), and 'Associated AI Assistant'. Under 'Search Model Settings', there's a section for 'Embedding Model' with a dropdown menu. The dropdown shows several options: 'Cohere Embed V4.0 (Cohere)' (selected and labeled 'Default'), 'Qwen3 Embedding 0.6B:Q8\_0 (Qwen)', 'Qwen3 Embedding 0.6B:F16 (Qwen)', 'MaiAgent Embedding (OpenSource) (MXBAI)', 'Cohere Embed Multilingual v3.0 (Bedrock) (Cohere)', and 'OpenAI text-embedding-3-large (OpenAI)'. At the bottom right of the dropdown are 'Cancel' and 'Save' buttons. A blue circular icon with a speech bubble is located at the bottom right of the main window.

## Reranker Model

Reranker is like a professional judge who re-evaluates which data in the initial search results can best answer the customer's question. What are the differences in effectiveness when using or not using a Reranker?

When a customer asks: "What tent is suitable for beginners? Budget under 8000 dollars"

### Without Reranker:

```
AI might respond:  
"We have tents at various price points, products at 8000 dollars include ..."  
(May mention advanced models, not focused enough on beginner needs)
```

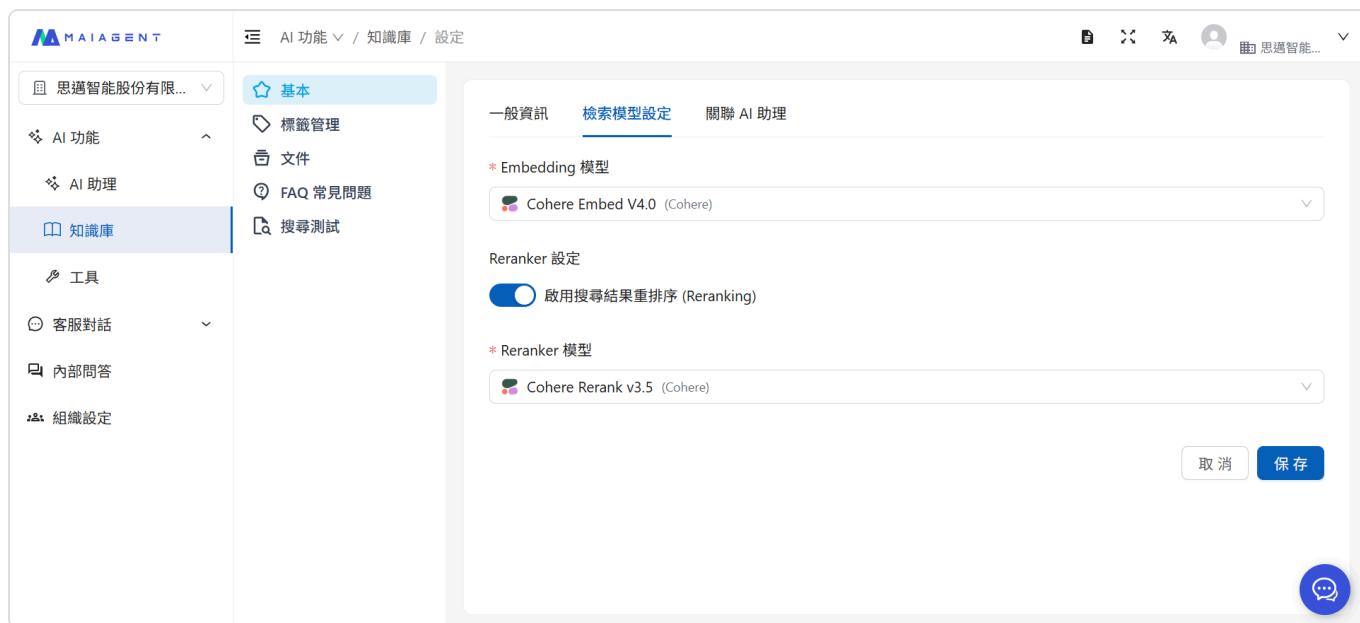
### With Reranker:

AI responds:

"Specifically recommended for beginners are these tents under 8000 dollars ..."  
(Precisely targets beginners + budget + product recommendations)

When search result reranking is enabled, the AI assistant will reorder the knowledge base content chunks retrieved, responding based on the most relevant documents.

To understand Reranker models, please refer to: [Technical Manual - Reranker Models](#)



In summary, using Embedding combined with Reranker allows the AI assistant to understand the knowledge you provide and, after retrieving chunks, review the importance of content again, responding with knowledge most relevant to the question.

## Associate AI Assistants

### Multiple AI Assistants Sharing a Knowledge Base

Associating AI assistants means authorizing which AI assistants you want to use this knowledge base. If you have two AI assistants:

#### Product Customer Service AI

#### Order Customer Service AI

When both need to answer questions related to returns, you can associate both AI assistants at once in the settings of the "[Return Policy](#)" knowledge base:

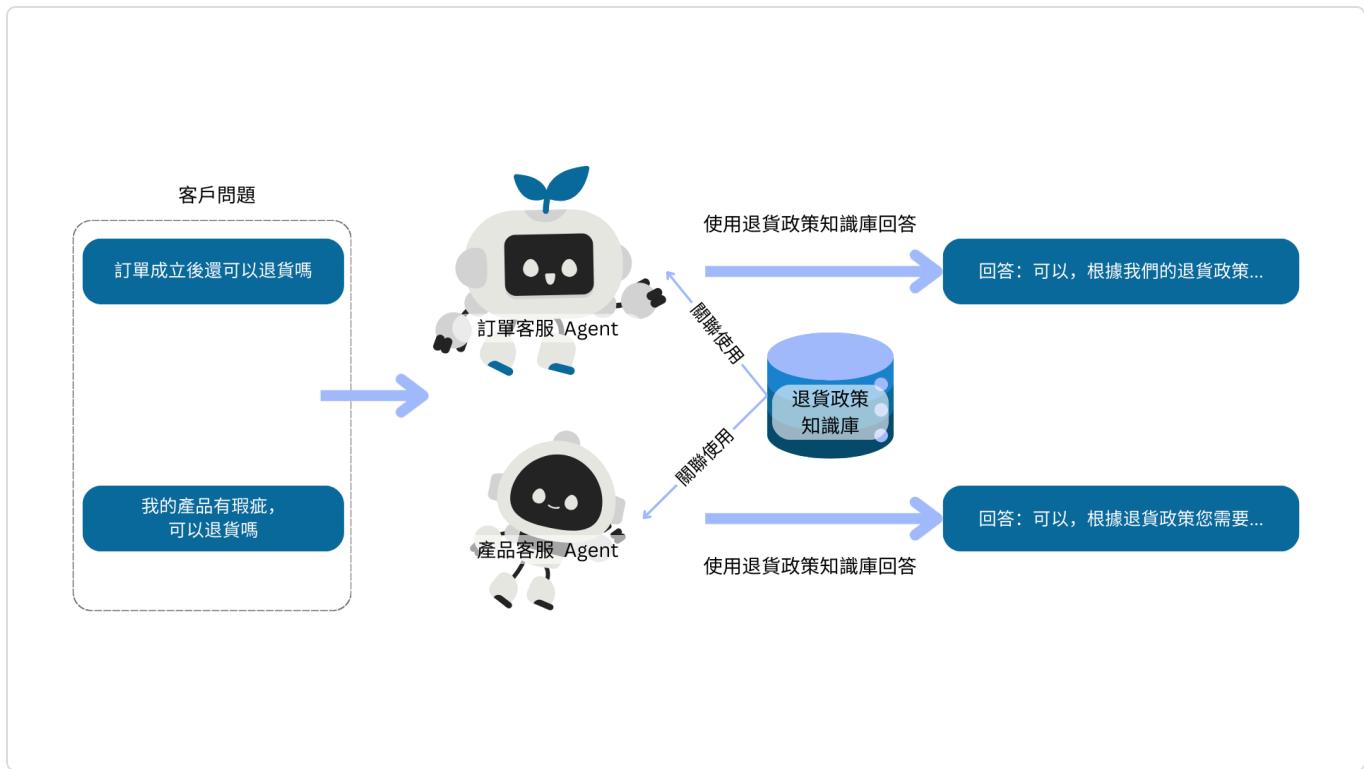


Diagram of associating multiple AI assistants

Select the AI assistants to associate

基本

標籤管理

文件

FAQ 常見問題

搜尋測試

一般資訊 檢索模型設定 關聯 AI 助理

關聯 AI 助理

可選 AI 助理 共 10 項

搜尋可選 AI 助理

全選 已選 2 項

fbd0d84c-231e-4e3a-8a4d-b1052db9b5ed

4d224392-25aa-4482-9ab0-3c66f612391c

16e32084-f72a-433d-ab2b-e193272a2eda

da10bf5e-b8c8-4cac-85cf-dc265aeac6ff

68aa8a32-798a-473c-8cc3-6e672ae896da

RAG 速度測試

已選 AI 助理 共 1 項

搜尋已選 AI 助理

全選 已選 0 項

4d224392-25aa-4482-9ab0-3c66f612391c

新增 AI 助理 >

< 移除 AI 助理

Click Add AI Assistant

After adding, it will appear in the selected AI assistants area. Click "Save" in the lower right corner to complete the association.

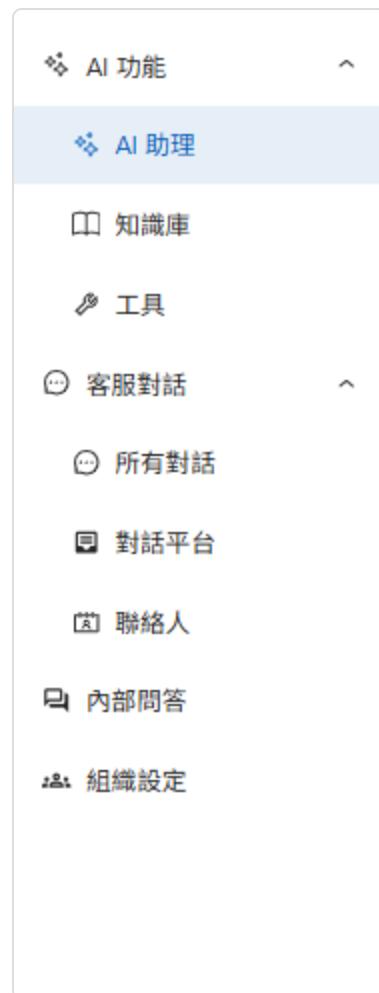
The screenshot shows the 'AI Assistant' settings page. On the left, there's a sidebar with links like 'Basic', 'Model Management', 'File', 'FAQ Common Questions', and 'Search Test'. The main area has tabs for 'General Information', 'Search Model Settings', and 'Associate AI Assistant'. Under 'Associate AI Assistant', there are two sections: 'Associated AI Assistant' (共 10 项) and 'Previously Associated AI Assistant' (共 3 项). Both sections list knowledge bases with checkboxes. A central vertical scroll bar is visible between the two sections. At the bottom right are 'Cancel' and 'Save' buttons, and a blue circular icon.

Once associated, both AI assistants can share the "[Return Policy](#)" knowledge base and respond based on the same content. For subsequent maintenance, you only need to **update one knowledge base** to ensure the AI assistants use the latest data.

## One AI Assistant Using Multiple Knowledge Bases

In addition to sharing knowledge bases, one AI assistant can also use multiple knowledge bases.

Enter the AI Assistant page, select the AI assistant you want to configure, and click Settings



ID	AI 助理名稱	LLM	回答模式	引用結果最大數量	關聯知識庫	最後更新時間	操作
5033645b-ec76-4e35-aaaf-643eac...	claude 助理	Claude 4 Sonnet	一般(預設)	12	claude 助理的知識庫 第一次嘗試的知識庫	2025-08-07 11:18:04	
93a1a874-e62a-455a-ae7d-e9037...	第一次嘗試	Claude 3.7 Sonnet	一般(預設)	12	第一次嘗試的知識庫	2025-08-05 14:21:58	

Enter Model Settings, click "Select Knowledge Base"

The screenshot shows the 'Model Settings' tab selected in the top navigation bar. Under the 'Knowledge Base' section, there is a list of available knowledge bases. The first item, 'claude 助理的知識庫', is selected. Below the list, there is a dropdown menu for '引用結果最大數量' (Maximum number of results) set to 12. At the bottom right of the page, there is a blue 'Save' button.

Select the knowledge bases to use and click Confirm. The selected knowledge bases will appear in the list

This screenshot shows a modal window titled 'Select Knowledge Base'. It contains two sections: 'claude 助理的知識庫' and '第一次嘗試的知識庫'. In the 'claude 助理的知識庫' section, there is a checked checkbox next to the text 'claude 助理的知識庫'. Below it are two buttons: '碩士' and '大學'. In the '第一次嘗試的知識庫' section, there is an unchecked checkbox next to the text '第一次嘗試的知識庫'. Below it is a single '碩士' button. At the bottom of the modal, there are two buttons: '取消' (Cancel) and '確認' (Confirm). The background of the modal is semi-transparent, showing parts of the previous screen.

The screenshot shows the 'Model Settings' tab of an AI assistant's configuration interface. On the left sidebar, there are sections for 'Basic' (selected), 'Metrics (Beta)', 'Feedback Quality Control', 'Webhook', 'Usage Analysis', and 'Chat Platform'. The main area is titled 'Using Knowledge Base' and contains a list of selected models:

- LLM Model**:
  - Claude 4 Sonnet (Claude)** (highlighted with a red border)
- Embedding Model**:
  - Cohere Embed V4.0 (Cohere)**
- Reranker Model**:
  - Cohere Rerank v3.5 (Cohere)**
- Maximum Number of Citations**: 12

A blue 'Save' button is located at the bottom right.

Finally, click "Save", and the AI assistant can use multiple knowledge bases

# How to Use Web Scraping (Data Crawling) Feature

## Feature Purpose and Value

As an enterprise user, you may often receive instructions from management to reference or compile regulatory information from certain public websites.

If you have a technical background, or have engineering support, you might be able to automatically extract data by writing crawler programs. However, for non-technical personnel, this usually means manually organizing page by page, which is not only time-consuming and labor-intensive but also prone to missing critical information.

In such cases, you can leverage MaiAgent's web crawler feature to quickly extract website content through a No-Code approach, automatically create structured data, significantly improve information organization efficiency, and invest your time in higher-value core business activities.

## How to Perform Web Crawling?

To create a crawler request, you can:

Create a Page Crawl Request

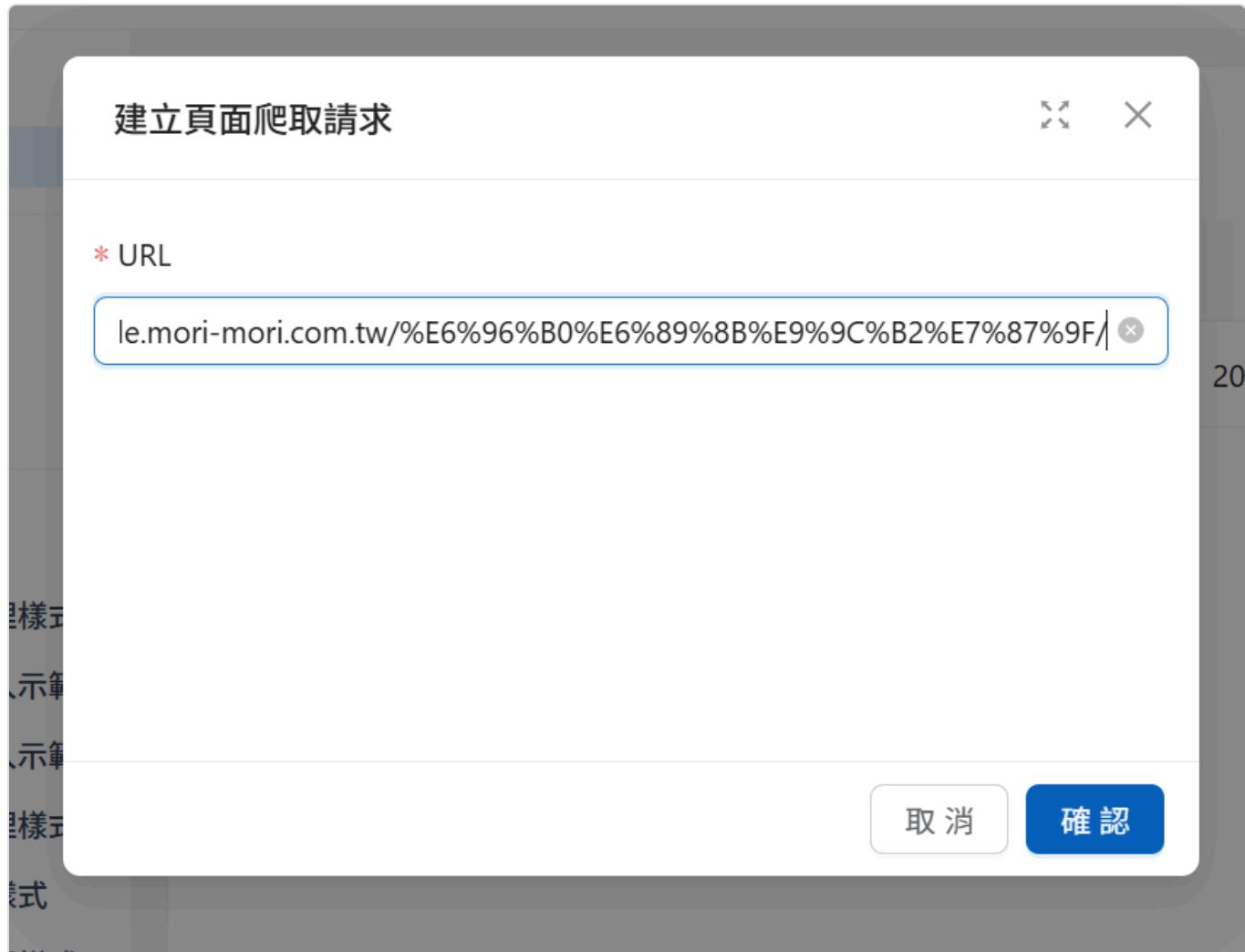
Navigate to "[AI Features > AI Assistant > Crawler](#)" in the left sidebar, and click the "[+ Create Page Crawl Request](#)" button in the upper right corner.

The screenshot shows the MaiAgent AI Assistant interface. The left sidebar has sections like AI 功能, AI 助理 (which is selected), 工具, 客服對話, 所有對話, 對話平台, 內部問答, and 組織設定. Under AI 助理, there are sub-sections: 基本 (selected), 知識庫 (highlighted in blue), and 處置 (Beta). The main area shows a table with columns: URL, 資料狀態, 建立時間, and 操作. A large red box highlights the "建立頁面爬取請求" button in the top right corner of the main area. The status bar at the bottom right shows a message icon.

Enter URL

Enter the URL of the page you want to crawl and press the [Confirm] button.

Please note that the URL cannot exceed 200 characters If the status does not change, you can click the refresh button in the upper right corner to update the page status



## View Crawled Data

When the status shows completed, click "Import" on the right to view the crawled data entries.

## Select Data

Check the boxes on the left to select the data you want to import into the knowledge base. After making your selections, click the "**Import**" button, and the data will be automatically imported into that AI assistant's knowledge base.

If you want to view more data entries on the same page, you can click "**10 items/page**" in the lower right corner to expand the viewing range.

頁面列表

請選擇您要匯入的網頁，以將內容新增至知識庫。

已選擇 3 項

	序號	標題	URL	匯入狀態
<input type="checkbox"/>	3	【露營注意事項】帳篷、LED煤油燈帶了嗎？露營裝備清單分享！』	<a href="https://article.mori-mori.com.tw/notice-of-glamping/">https://article.mori-mori.com.tw/notice-of-glamping/</a>	待匯入
<input checked="" type="checkbox"/>	4	【露營注意事項】帳篷、LED煤油燈帶了嗎？露營裝備清單分享！	<a href="https://article.mori-mori.com.tw/prepare-for-picnic/">https://article.mori-mori.com.tw/prepare-for-picnic/</a>	待匯入
<input checked="" type="checkbox"/>	5	氣氛燈 系列	<a href="https://www.mori-mori.com.tw/page/002">https://www.mori-mori.com.tw/page/002</a>	待匯入
<input type="checkbox"/>	6	RV桶	<a href="https://www.youtube.com/watch?v=cr0O_M7zO1Y">https://www.youtube.com/watch?v=cr0O_M7zO1Y</a>	待匯入

共 36 條資料 [1](#) [2](#) [3](#) [4](#) > [10 條/頁](#) 跳至  頁

[取消](#) [匯入](#)

In the knowledge base, you can see the data presented as .md files, which can be configured with tags and metadata just like regular data.

基本

標籤管理

**文件**

FAQ 常見問題

搜尋測試

ID	檔案名稱	檔案類型	檔案大小	處理狀態	解析器	建立時間	操作
2b0b07cc-...	氣氛燈-系列.md	md	212 B	完成	MaiAgent Parser (預設)	2025-08-19 18:15:	<a href="#">檢視</a> <a href="#">編輯</a> <a href="#">複製</a> <a href="#">刪除</a>
92f02812-...	露營注意事項-帳篷-LED煤油燈帶了嗎-露營裝備清單分享.md	md	7.5 KB	完成	MaiAgent Parser (預設)	2025-08-19 18:15:	<a href="#">檢視</a> <a href="#">編輯</a> <a href="#">複製</a> <a href="#">刪除</a>
9fe60351-...	新手露營如何準備-一篇帶你認識露營基本觀念和重要裝備-MoriMori-品牌台灣官網-日本熱銷LED煤油燈藍牙音響.md	md	11.58 KB	完成	MaiAgent Parser (預設)	2025-08-19 18:15:	<a href="#">檢視</a> <a href="#">編輯</a> <a href="#">複製</a> <a href="#">刪除</a>
d258c145-...	野餐準備全攻略-一篇掌握用品-食物與遊戲清單-選對地點享受樂趣.md	md	14.96 KB	完成	MaiAgent Parser (預設)	2025-08-19 18:00:	<a href="#">檢視</a> <a href="#">編輯</a> <a href="#">複製</a> <a href="#">刪除</a>

共 12 條資料 [1](#) [2](#) > [10 條/頁](#) 跳至  頁

## Web Crawler Usage Notes

Please ensure you have permission to crawl content from the target website

It is recommended to test with a small amount of data before performing large-scale crawling

After crawling is complete, you can verify data quality through the [search test feature](#)

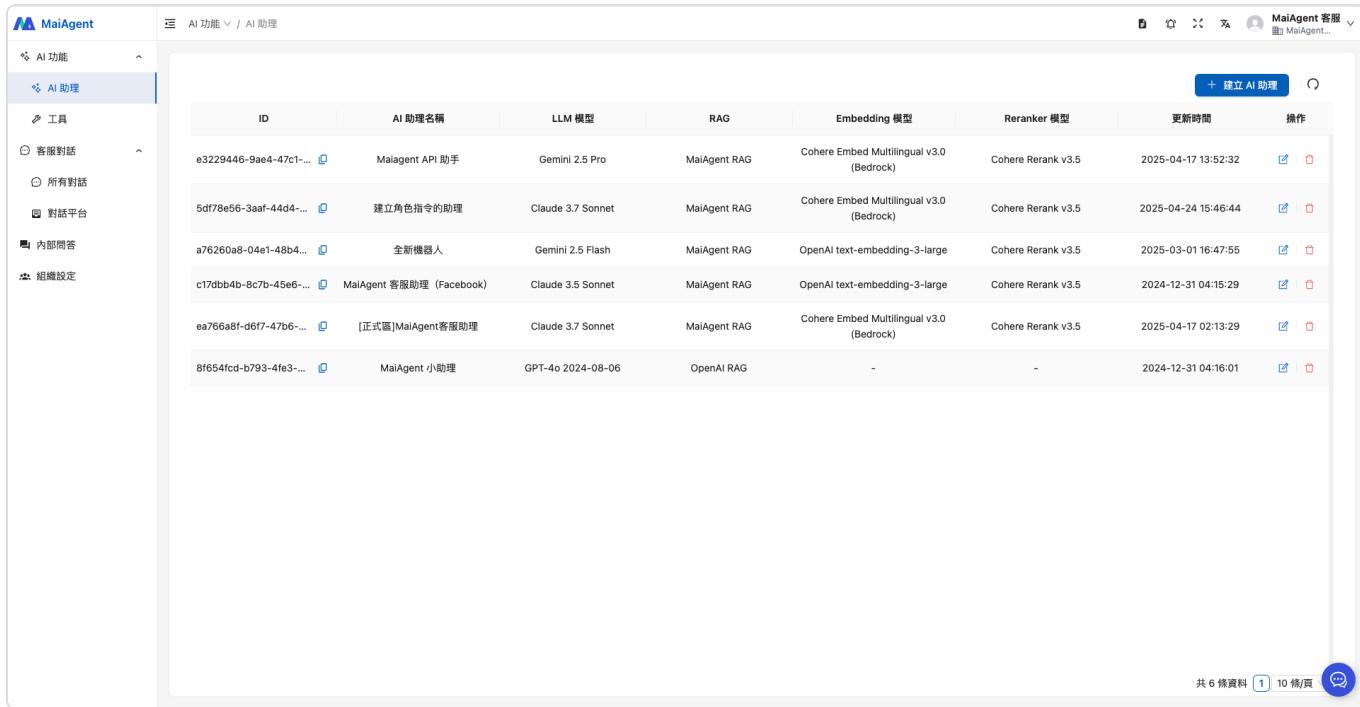
Regularly update crawled data to maintain information timeliness

# How to Create FAQ

## How to Upload FAQs

### Select AI Assistant

Navigate to "AI Features > AI Assistant" in the left sidebar, select which AI Assistant you want to create FAQs for, and click the "Actions" icon on the right.

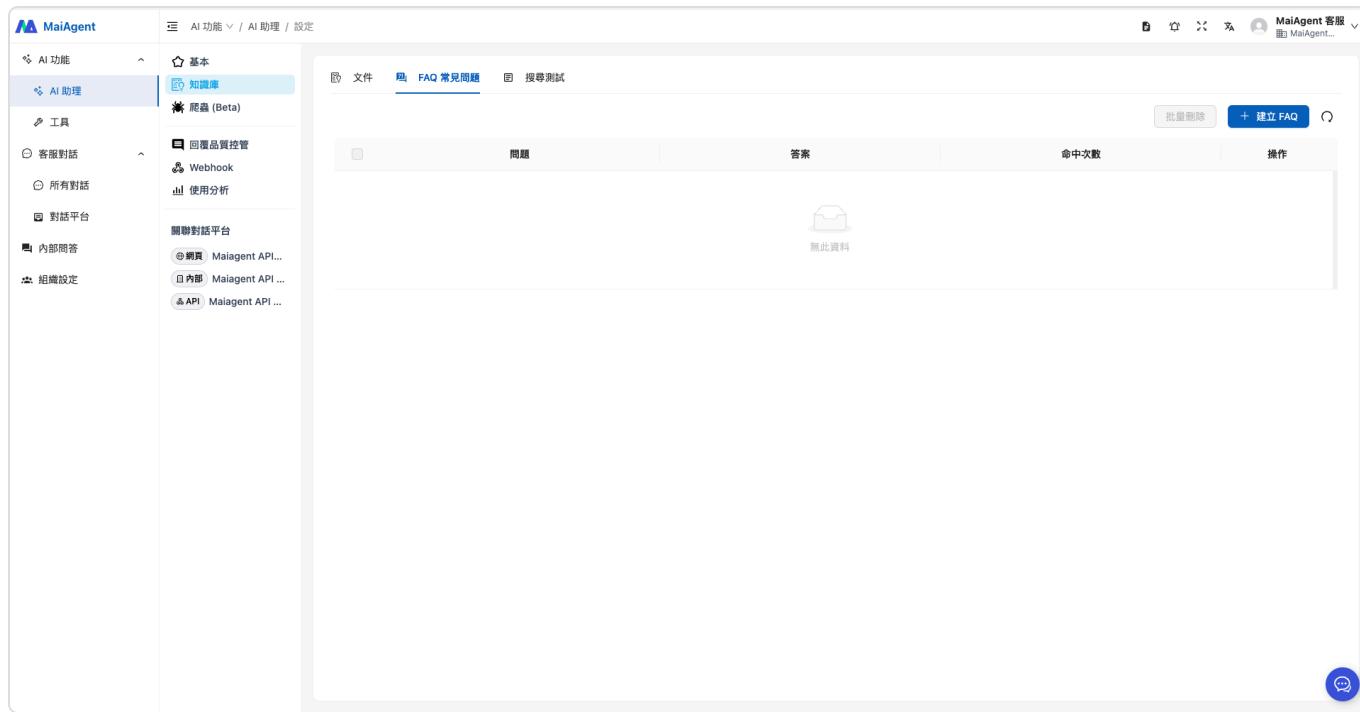


The screenshot shows the MaiAgent AI Assistant management interface. On the left, there's a sidebar with categories like AI 功能, AI 助理, 工具, 客服對話, 所有對話, 對話平台, 內部問答, and 組織設定. The AI 助理 section is selected and expanded, showing a table of AI assistants. The columns in the table are ID, AI 助理名稱, LLM 模型, RAG, Embedding 模型, Reranker 模型, 更新時間, and 操作. There are six rows listed, each with a blue 'Edit' icon and a red 'Delete' icon in the操作 column. The table also includes a header row with these column names. At the bottom right of the table area, it says '共 6 條資料 10 條/頁' and has a blue message icon.

ID	AI 助理名稱	LLM 模型	RAG	Embedding 模型	Reranker 模型	更新時間	操作
e3229446-9ae4-47c1-... ⓘ	Maiagent API 助手	Gemini 2.5 Pro	MaiAgent RAG	Cohere Embed Multilingual v3.0 (Bedrock)	Cohere Rerank v3.5	2025-04-17 13:52:32	<span>编辑</span> <span>删除</span>
5df78e56-3aaaf-44d4-... ⓘ	建立角色指令的助理	Claude 3.7 Sonnet	MaiAgent RAG	Cohere Embed Multilingual v3.0 (Bedrock)	Cohere Rerank v3.5	2025-04-24 15:46:44	<span>编辑</span> <span>删除</span>
a76260a8-04e1-48b4-... ⓘ	全新機器人	Gemini 2.5 Flash	MaiAgent RAG	OpenAI text-embedding-3-large	Cohere Rerank v3.5	2025-03-01 16:47:55	<span>编辑</span> <span>删除</span>
c17dbb4b-8c7b-45e6-... ⓘ	MaiAgent 客服助理 (Facebook)	Claude 3.5 Sonnet	MaiAgent RAG	OpenAI text-embedding-3-large	Cohere Rerank v3.5	2024-12-31 04:15:29	<span>编辑</span> <span>删除</span>
ea766a8f-d6f7-47b6-... ⓘ	[正式啟]MaiAgent客服助理	Claude 3.7 Sonnet	MaiAgent RAG	Cohere Embed Multilingual v3.0 (Bedrock)	Cohere Rerank v3.5	2025-04-17 02:13:29	<span>编辑</span> <span>删除</span>
8f654fcfd-b793-4fe3-... ⓘ	MaiAgent 小助理	GPT-4o 2024-08-06	OpenAI RAG	-	-	2024-12-31 04:16:01	<span>编辑</span> <span>删除</span>

### Add Q&A Content

Navigate to "AI Features > AI Assistant > Knowledge Base" in the left sidebar, select the "FAQ" tab, and click the "+Create FAQ" blue button in the upper right corner to start adding Q&A content.



## Create FAQ

The FAQ editing page supports various answer formats:

Basic text operations (bold, underline, italic, etc.)

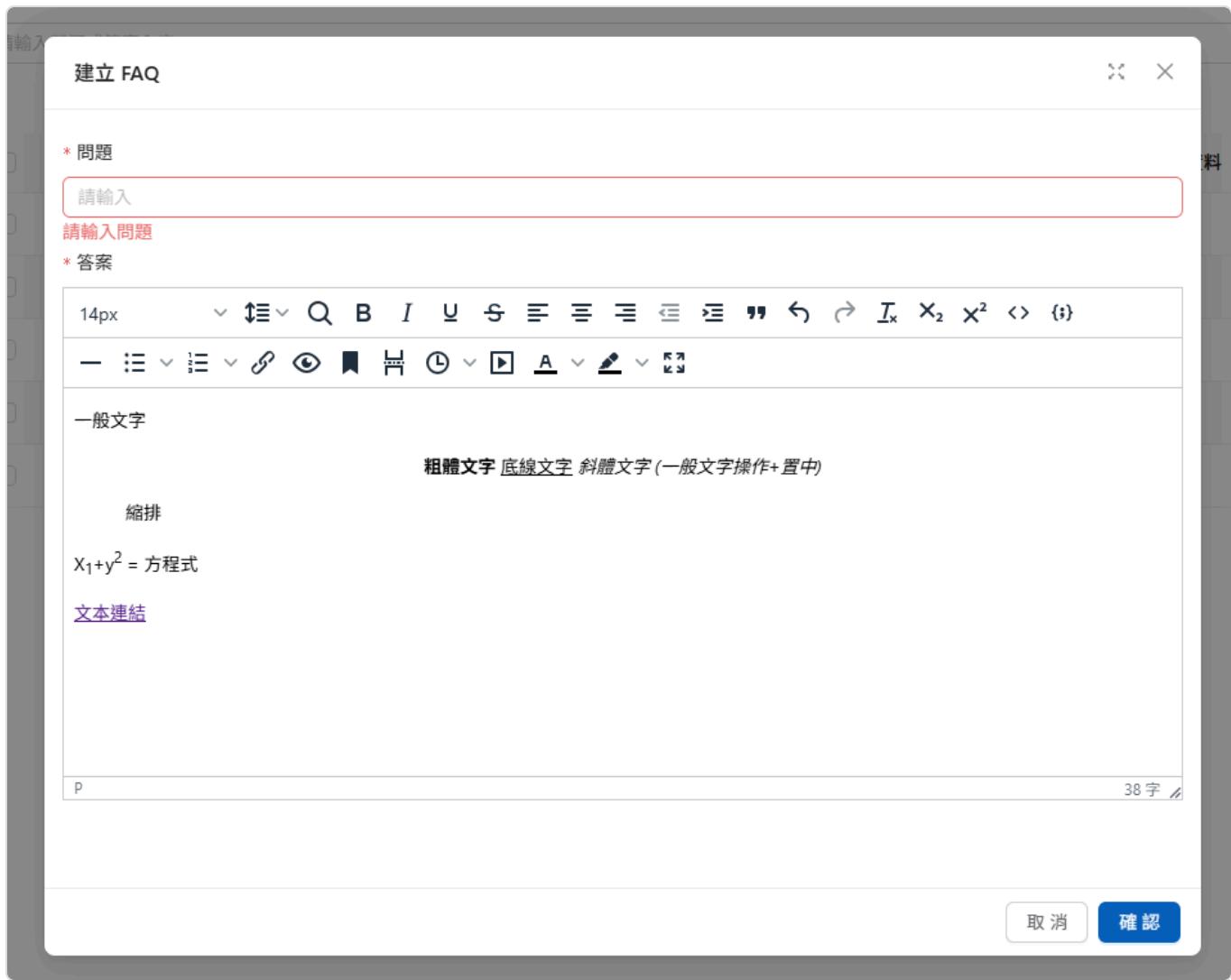
Equations

Source code (HTML, XML)

Embedded links (videos, websites)

Videos provide reference links for users (AI Assistant cannot read video content yet)

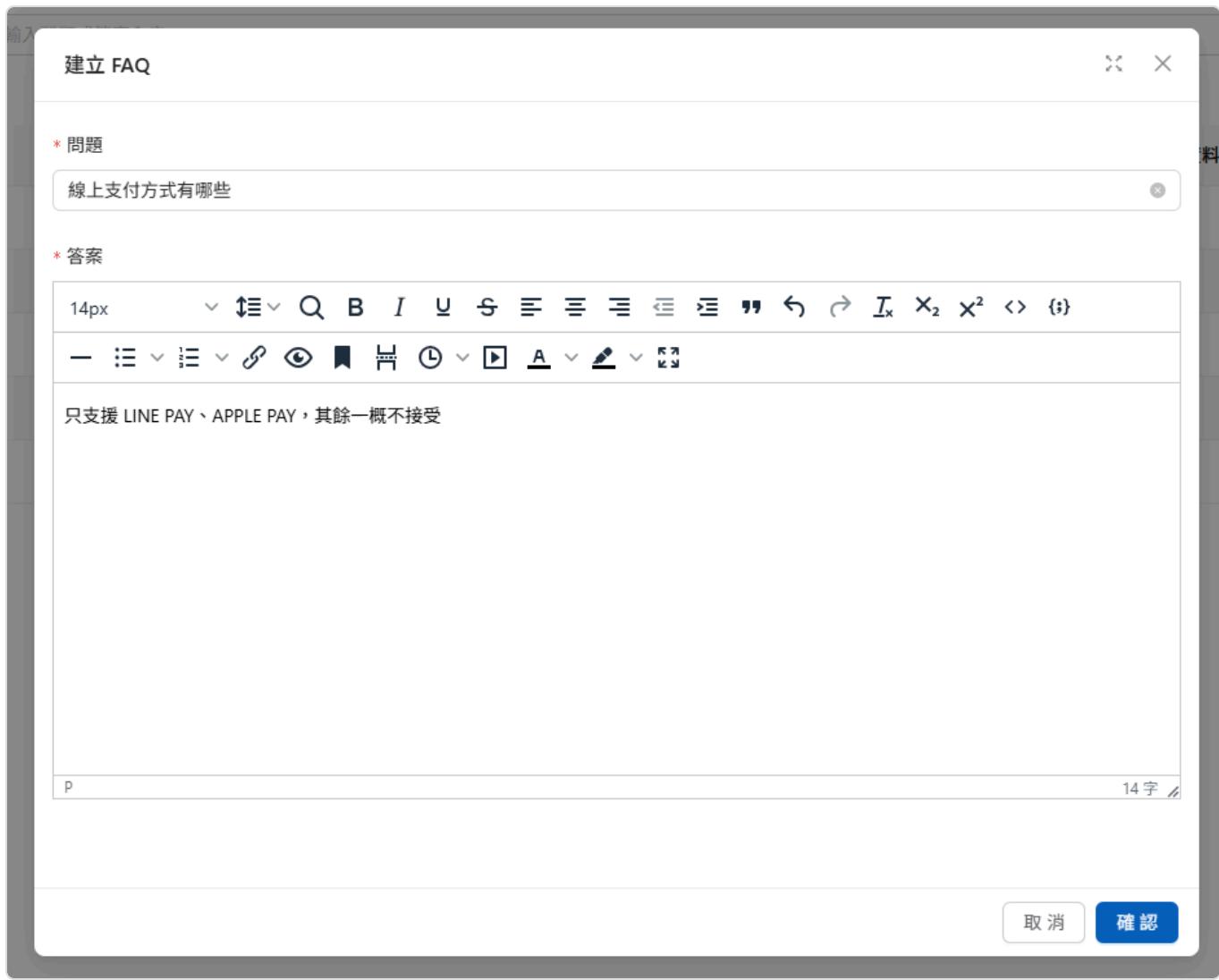




Answer format illustration

This allows you to use multiple formats to clearly highlight key points in answers and ensure complete information.

Using e-commerce payment methods as an example, you can add the following question to explain online payment options:



After creation, you can click preview to confirm the answer content:

建立 FAQ

\* 問題

線上支付方式有哪些

\* 答案

14px

只支援 LINE PAY、APPLE PAY，其餘一概不接受

P 14 字

取消 確認



After adding, click "**Confirm**", and the FAQ is created. The AI Assistant can now reference your provided answer when responding:

The screenshot shows a list of frequently asked questions (FAQs) in a table format. The columns are labeled: 問題 (Question), 答案 (Answer), 標籤 (Tags), 元資料 (Meta Data), 命中次數 (Hit Count), and 操作 (Actions). One question, "線上支付方式有哪些", is highlighted with a red border. The interface includes a search bar at the top and a sidebar with various navigation links like '基本' (Basic), '標籤管理' (Tag Management), '文件' (File), and 'FAQ 常見問題' (FAQ Common Questions).

When customers ask questions related to online payment methods, the LLM will respond based on the FAQ content:

The screenshot shows the AI Assistant's response window. It displays a message from the user asking about online payment methods, followed by a response from the AI Assistant. The response is framed in a box and states: "根據知識庫資料，目前支援的線上支付方式有：  
1. LINE PAY - 透過LINE應用程式進行支付  
2. Apple Pay - 蘋果裝置的行動支付服務". This response is limited to the information provided in the FAQ knowledge base. The interface also shows a sidebar with various sections like 'AI 功能', 'AI 助理', '知識庫', '工具', '客服對話', and '內部問答'.

This way, you can limit the AI Assistant's response scope and prevent it from providing incorrect or non-compliant answers.

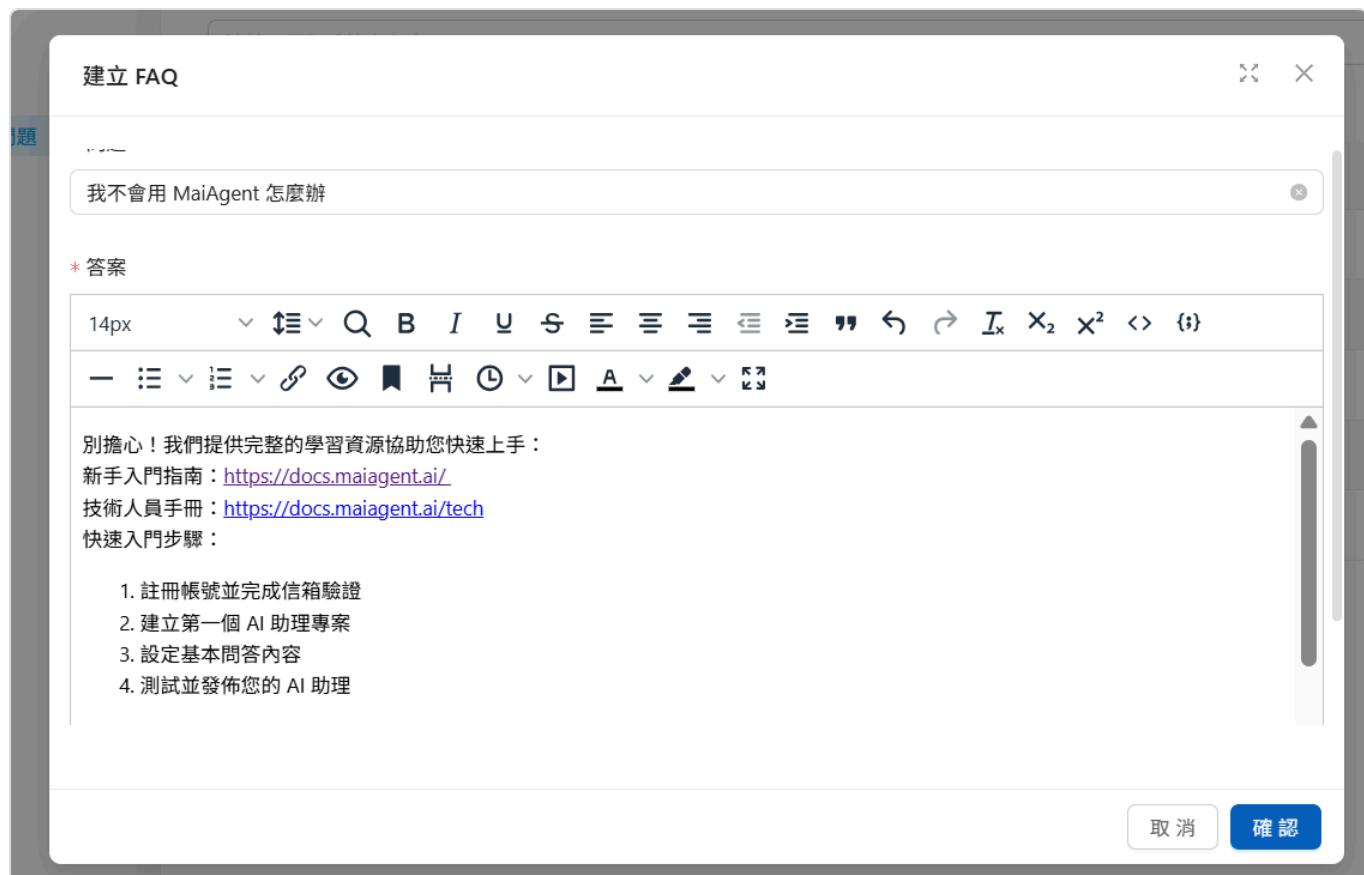
## Other Applications

### Product Operation Guidance Q&A

Using **MaiAgent Platform Usage** as an example, if you need to help new users understand how to start using the MaiAgent system, you can add the following Q&A in the FAQ section:

**Question:** What should I do if I don't know how to use MaiAgent?

When the answer is too long, you can click preview to confirm the complete content



預覽 X

別擔心！我們提供完整的學習資源協助您快速上手：

新手入門指南：<https://docs.maiagent.ai/>

技術人員手冊：<https://docs.maiagent.ai/tech>

快速入門步驟：

- 1. 註冊帳號並完成信箱驗證
- 2. 建立第一個 AI 助理專案
- 3. 設定基本問答內容
- 4. 測試並發佈您的 AI 助理

- 基礎教學：
  - 1. 平台介面導覽（2分鐘）
  - 2. 建立第一個 AI 助理（5分鐘）
  - 3. FAQ 設定教學（2分鐘）
- 進階功能：
  - 1. 客製化回應設定
  - 2. 數據分析使用方式
  - 3. 第三方系統整合
- 常見問題快速解答：
  - 忘記密碼 → 使用忘記密碼功能重設
  - 無法建立助理 → 檢查網路連線及瀏覽器版本
  - FAQ 無法儲存 → 確認內容格式是否正確

關閉 共 5 頁

Answer preview screen

The AI Assistant will explain the available resources and getting started steps for MaiAgent based on your provided answer, and provide links from your answer for user reference:

## Knowledge Introduction

Using **LLM Technology Introduction** as an example, if you run a technology education platform and need to explain what Large Language Models (LLM) are to the general public, you can add the following Q&A in the FAQ section:

**Question:** What is the operating principle of LLM?

Video links can be entered in the answer

輸入

## 建立 FAQ

\* 問題

LLM 的運作原理是甚麼？

\* 答案

14px

相關技術文章：<https://tech-blog.com/what-is-lm> LLM 發展歷程：<https://ai-history.com/lm-timeline> 實際應用案例：<https://examples.com/lm-use-cases>

常見迷思澄清：

誤解：LLM 擁有意識和情感  
事實：LLM 是基於統計學習的預測模型

誤解：LLM 能夠 100% 正確回答所有問題  
事實：LLM 會根據訓練資料產生回應，可能出現錯誤

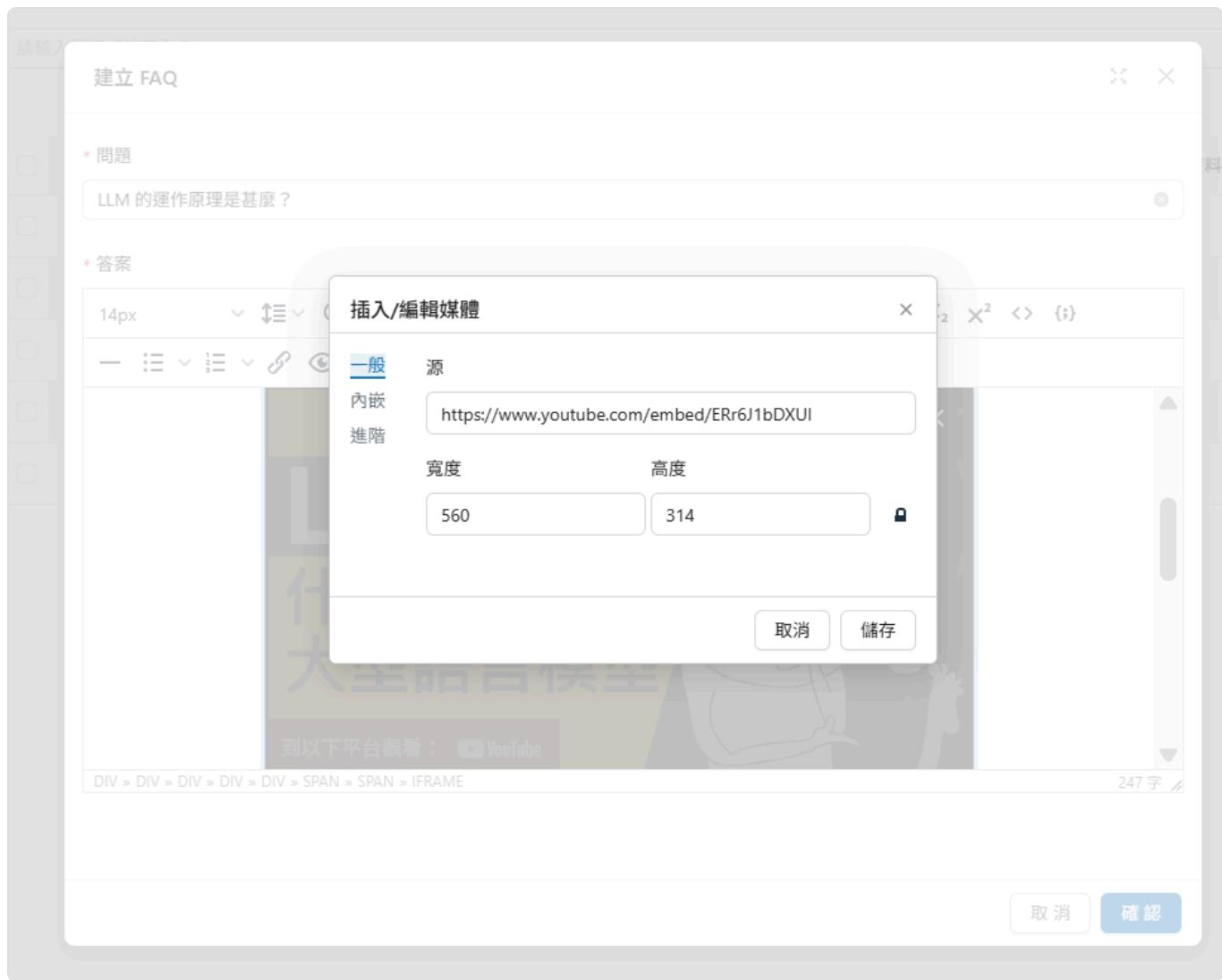
誤解：LLM 會取代所有人類工作  
事實：LLM 是輔助工具，協助提升工作效率

DIV » SPAN

247 字

取消 確認

Click insert/edit media



Link entry illustration



Media insertion preview

The AI Assistant will respond based on your configured answer and provide the video reference link for users to access:

全螢幕嵌入示範

關於 LLM 運作方法的影片可以參考嗎？  
2025-08-28 12:32:04

**全螢幕嵌入示範**

根據知識庫資料，我找到了專門關於 LLM 運作原理的影片資源：

**LLM 技術詳解影片**

YouTube 影片：<https://www.youtube.com/embed/ERr6J1bDXU>

這個影片專門講解 LLM（大型語言模型）的運作原理，可以幫助您深入了解：

- LLM 的基本架構
- 訓練過程和機制
- 文字生成的原理
- 統計模式預測方法

**建議觀看方式**

結合影片和理論知識一起學習效果更好：

1. 先觀看影片 - 概覽化了解 LLM 運作
2. 刪照文字說明 - 加深理解
3. 考慮實際應用 - 連結到 ChatGPT、Claude 等實例

這個影片應該能帶你深入瞭解關於 LLM 如何運作的詳細！

步驟

已選擇 12 個參考文件  
已選擇 5 個問答項目

請輸入您想問的問題

文件 (12) 已選擇 12 個文件 清除選擇

AI 助理設定

## FAQ Management and Maintenance Key Points

### Content Timeliness Management

**Event Information Updates:** Immediately remove or update related content after promotional events and limited-time offers end

**Policy Synchronization:** When company policies (such as return/exchange conditions, terms of service) change, ensure FAQ content is updated accordingly

**Product Information Maintenance:** Reflect information about new product launches, specification changes, discontinued products, etc. in relevant Q&As in real-time

## Data-Driven Optimization

**Answer Quality Improvement:** Optimize answer content for high-frequency questions to provide more detailed and practical information

**Gap Analysis:** Discover common questions not covered in FAQs through customer feedback and customer service records

## Quality Control Mechanism

**Content Accuracy Check:** Regularly verify that links, contact information, and technical data in FAQs are correct

**Tone Consistency:** Ensure all FAQ content aligns with brand tone and communication style

**Multi-language Version Synchronization:** If multilingual support is needed, ensure content across all language versions remains synchronized

You can check the hit count of FAQs to identify the most frequently asked question categories by users and update regularly. For hit count explanation, see: [Search Testing](#)

問題	答案	標籤	元資料	命中次數	操作
MaiAgent 的概述頁面長怎樣啊？	<pre class="language-markup"><code...</code></pre>			5	
LLM 的運作原理是甚麼？	<div> <div class="relative mx-auto pag...</div>			5	
我不會用 MaiAgent 怎麼辦	<p>別擔心！我們提供完整的學習資源協...			3	
線上支付方式有哪些	<p>僅能使用 <span style="color: #0000...</span>	VIP	一般會員	3	
取消訂單後多久會退款	信用卡：3-7個工作天 ATM轉帳：1-3個...			5	

This management mechanism enables the AI Assistant to always provide accurate, timely, and user-relevant responses, enhancing the overall customer service experience.

# Document Management: Tags and Metadata

---

Due to the potential large volume of documents or FAQs in the knowledge base, MaiAgent provides tag management and metadata management features, allowing you to categorize and organize extensive documents and FAQs.

## Tag Management

When your knowledge base contains a large amount of data, the tag system helps you quickly organize document and FAQ attributes, or control access permissions for reference materials. For example:

```
Product Information Knowledge Base (Categorized by Product Information)
└─ #Tent
└─ #4-Person Tent
└─ #Three-Season Tent
└─ #SnowPeak
```

```
Educational Content Knowledge Base (Categorized by Permission Level)
└─ #Non-Member
└─ #Regular Member
└─ #VIP
```

## Adding Tags

Click the add button

The screenshot shows a sidebar with navigation items: 基本 (Basic), 標籤管理 (Tag Management) (highlighted in blue), 文件 (File), FAQ 常見問題 (FAQ Common Questions), and 搜尋測試 (Search Test). The main area is titled '標籤管理' (Tag Management) and contains a message: '管理可在文件編輯時選擇的標籤選項。這些標籤將會在編輯文件資訊時作為建議標籤提供。' Below this is a table with columns: ID, 標籤名稱 (Label Name), and 操作 (Operation). A single row is shown with a folder icon and the text '無此資料' (No data available). A blue circular button with a white speech bubble icon is located in the bottom right corner.

Enter the tag name

The screenshot shows a modal dialog box titled '新增標籤' (Add Tag). It has a text input field labeled '標籤名稱' (Label Name) with the placeholder '輸入標籤名稱' (Enter label name). At the bottom are two buttons: '取消' (Cancel) and '新增' (Add) (highlighted in blue). The background is dimmed, and a watermark-like text '為建議標籤' (For suggested tags) is visible.

After clicking add, the tag you just entered will be displayed as follows, including ID, name, etc.

The ID can be used when opening document permissions. For details, please see [Technical Manual](#) [Query Metadata Control Items](#)

## 標籤管理

+ 新增

管理可在文件編輯時選擇的標籤選項。這些標籤將會在編輯文件資訊時作為建議標籤提供。

ID	標籤名稱	操作
14cba1e9-6e2c-4cbc-a480-50b72cb82e85	VIP	
6063131c-0660-4a0b-90bd-6d89bfc34181	一般會員	
8a2accf5-a5df-4f7c-8f9e-7facaffdc9a1	非會員	

## Adding Tags to Documents

After tags are added, proceed to the document page

Click edit file information

The screenshot shows a user interface for managing files. On the left, there's a sidebar with navigation links: 基本, 標籤管理, **文件**, 常見問題, and 搜尋測試. The '文件' link is currently active. The main area has a search bar at the top with placeholder text '請輸入文件名稱或 ID'. Below the search bar are several dropdown menus: 全部狀態, 全部檔案類型, and 重置篩選. There are also buttons for 批量修改解析器, 批量刪除, and 上傳檔案. The main content area displays a table of documents:

ID	檔案名稱	檔案類型	檔案大小	處理狀態	操作
d2bb2b6a...	初級露營.pdf	pdf	2.53 MB	完成	
a753ea88-...	進階露營.pdf	pdf	2.68 MB	完成	
c1a800a3-...	產品搭配使用情境.pdf	pdf	5.59 MB	完成	

At the bottom right of the main area, there are buttons for '共 3 條資料' (3 items), '10 條/頁' (10 items per page), and a message bubble icon.

Select tags

According to different document requirements, add corresponding tags (you can select multiple tags)



Thus, the added tags will be displayed after the corresponding document:

## Adding Tags to FAQs

If you wish to add hierarchical classification or tag management to FAQs, you can:

Enter the FAQ management interface within the knowledge base, select the FAQ to edit, and click the edit button

Select the tags to add, and after adding, click "**Confirm**"

常見問題

測試

標籤

## 問題: 線上支付方式有哪些

×

標籤

元資料

### 目前標籤

請選擇標籤

VIP

一般會員

非會員

教學

問題

## 問題: 線上支付方式有哪些

×

標籤

元資料

### 目前標籤

VIP ×

一般會員 ×

標籤可以幫助您更好地分類和檢索文件

取消

確定

The added tags will appear in the FAQ field

The screenshot shows a user interface for managing Frequently Asked Questions (FAQs). On the left, there's a sidebar with links: 基本 (Basic), 標籤管理 (Tag Management), 文件 (Documents), FAQ 常見問題 (FAQ Common Questions) which is highlighted in blue, and 搜尋測試 (Search Test). The main area has a search bar at the top with placeholder text '請輸入問題或答案內容、ID'. Below it is a table with the following data:

問題	答案	標籤	操作
<input type="checkbox"/> 線上支付方式有哪些	僅能使用 Apple Pay，其他...	VIP 一般會員 url: http	
<input type="checkbox"/> 取消訂單後多久會退款	信用卡：3-7個工作天 ATM...		

At the bottom right of the table, there are buttons for '共 2 條資料' (2 items total), '10 條/頁' (10 items per page), and a blue circular button with a speech bubble icon.

## Tag-Based Access Control

You can control different users to see different content based on different tags, such as VIP customers being able to see more advanced product demonstrations, while non-members can only see general demonstrations.

Both FAQs and documents can apply filtering

### AND Filter

The AND tag filter opens content that simultaneously meets all tag conditions.

For example: if this conversation is related to educational content for non-members, you can use tag filtering to only open documents that simultaneously meet the "**non-member**" and "**educational**" tags for the AI assistant to use.

As shown: after filtering, the AI assistant can only use beginner camping documents, avoiding disclosure of irrelevant information to non-member conversations.

The screenshot shows the AI-powered knowledge base interface. On the left, there's a sidebar with categories like AI 功能, AI 助理, 知識庫, 工具, and 客服對話. The main area displays a search result for '露營燈' (Camping Light). It includes a summary of the document, a section titled '檔案狀況' (File Status), and a '使用場景考量' (Usage Scenario Consideration) section. Below the main content, there's a note about selecting reference files and a search bar.

**標籤過濾**

組 1 AND 滿足所有條件  
非會員 ✖ 教學 ✖  
+一般會員 +VIP

組間關係： OR 滿足任一組的條件  
過濾公式： ((非會員 & 教學))  
找到 1 個符合條件的文件

文件 (1)  
已選擇 1 個文件 清除選擇  
露營資料庫 (1個檔案)  
初级露營.pdf  
非會員 教學

## OR Filter

For conversations with members, you can use the OR filter to allow documents that meet either regular member or non-member conditions to be referenced by the AI assistant:

This screenshot is similar to the one above, but it shows an OR filter being used. In the '標籤過濾' (Tag Filtering) section, the '組 1' dropdown is set to 'OR' instead of 'AND'. The results show three documents: '露營注意事項.pdf', '初级露營.pdf', and '進階露營.pdf', all under the '露營資料庫' category.

**標籤過濾**

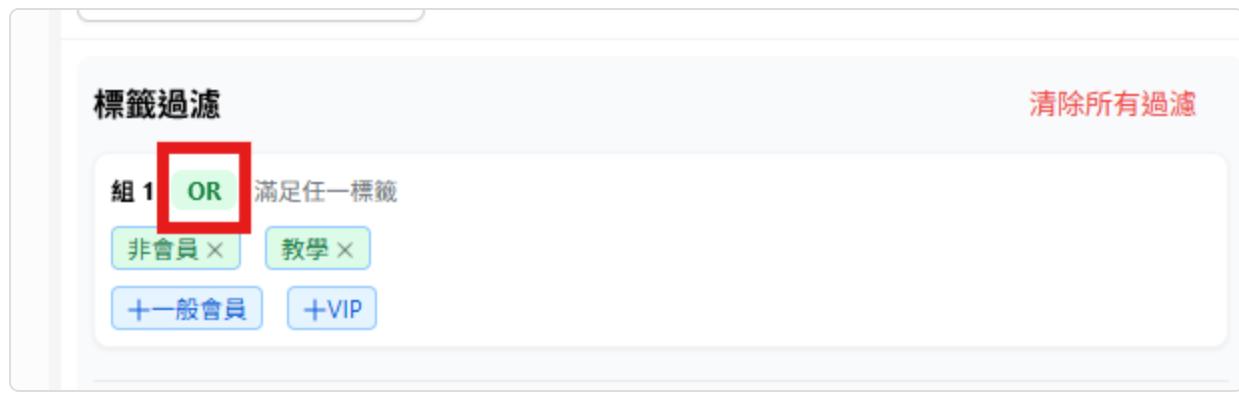
組 1 OR 滿足任一標籤  
非會員 ✖ 教學 ✖  
+一般會員 +VIP

組間關係： OR 滿足任一組的條件  
過濾公式： ((非會員 | 教學))  
找到 3 個符合條件的文件

文件 (3)  
已選擇 3 個文件 清除選擇  
露營資料庫 (3個檔案)  
露營注意事項.pdf  
非會員  
初级露營.pdf  
非會員 教學  
進階露營.pdf  
一般會員 教學

Members will be able to see more document content than non-members, achieving permission tiering.

You can switch filtering mechanisms by clicking "AND" or "OR" in the tag filter



For filtering results, please refer to: [Internal Q&A Features](#)

## Document Metadata Management

### What is Metadata?

Metadata is like a document's "ID card," recording detailed information about the document to help the system better manage and use these documents.

#### Example: Beginner Camping.pdf

```
Metadata Settings:  
--- Document Version: v2.1  
--- Creation Date: 2024-03-15  
--- Last Updated: 2024-11-20  
--- Next Review: 2025-05-20  
--- Update Department: Marketing  
--- Version Status: Reviewed and Available
```

### Why Use Metadata?

In situations with complex data, using metadata helps you maintain data quality more conveniently and quickly, assisting you in:

#### Improving Management Efficiency

Quickly identify document status and version information

More organized when batch managing large numbers of documents

Reduce manual search and verification time

#### Ensuring Content Quality

Use the latest document versions

Track document update history and version status

Ensure AI assistants use the latest and reviewed content

Set periodic review reminders to maintain data quality

## Adding Metadata to Documents

Enter the document page and click edit document information:

The screenshot shows a user interface for managing documents. On the left, there's a sidebar with tabs: 基本 (Basic), 標籤管理 (Label Management), **文件 (File)**, FAQ 常見問題 (FAQ Common Questions), and 搜尋測試 (Search Test). The main area has a search bar at the top with placeholder text '請輸入文件名稱或 ID' and dropdown filters for '全部狀態' (All Status) and '全部檔案類型' (All Document Types). Below the search bar are buttons for '批量修改解析器' (Batch Modify Parser), '批量刪除' (Batch Delete), and '上傳檔案' (Upload File). A table lists three documents with columns: ID, 檔案名稱 (Document Name), 檔案類型 (Document Type), 檔案大小 (Document Size), 處理狀態 (Processing Status), and 操作 (Operations). The first document is '初級露營.pdf' (d2bb2b6a...), the second is '進階露營.pdf' (a753ea88-...), and the third is '產品搭配使用情境.pdf' (c1a800a3-...). Each row has a checkbox, a preview icon, and a 'MaiAgent' button followed by icons for download, edit, and delete. The 'edit' icon for the first document is highlighted with a red box. At the bottom right, there's a message bubble icon and pagination controls showing '共 3 條資料' (3 items total), '1' (selected page), and '10 條/頁' (10 items per page).

Switch to the metadata tab and enter metadata mappings

MaiAgent uses key-value pairs to store and retrieve metadata

請輸入文件名稱或 ID

全部狀態

初級露營.pdf



批量修改解

標籤

元資料

目前元資料

新增元資料

文件版本

v2.1

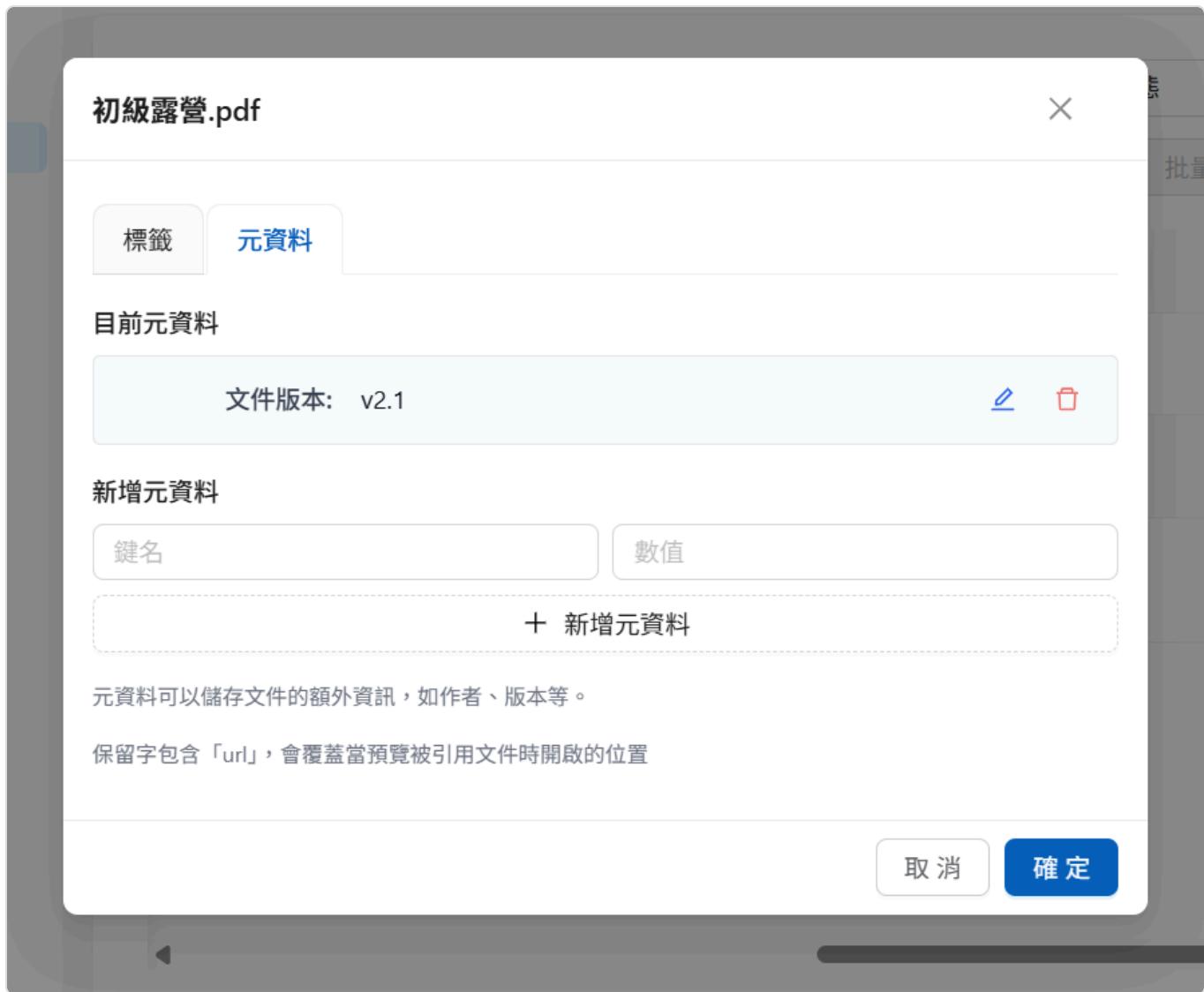
+ 新增元資料

元資料可以儲存文件的額外資訊，如作者、版本等。

保留字包含「url」，會覆蓋當預覽被引用文件時開啟的位置

取消

確定



After entering, click the "**Add Metadata**" button to add the key-value mapping you just entered (you can add multiple metadata entries at once).

The screenshot shows a file management interface with a sidebar containing navigation links: 基本 (Basic), 檔案管理 (File Management), **文件** (File), FAQ 常見問題 (FAQ Common Questions), and 搜尋測試 (Search Test). The main area displays a table of files with columns: ID, 檔案名稱 (File Name), 檔案類型 (File Type), 檔案大小 (File Size), 處理狀態 (Processing Status), 解析器 (Parser), 建立時間 (Creation Time), 標籤 (Tags), 元資料 (Metadata), and 操作 (Operations). The table lists three files:

ID	檔案名稱	檔案類型	檔案大小	處理狀態	解析器	建立時間	標籤	元資料	操作
d2bb2b6a...	初級露營.pdf	pdf	2.53 MB	完成	MaiAgent Parser (預設)	2025-08-18 17:37:43	升級員 教學	文件版本: v2.1	<input type="button"/>
a753ea88-8...	進階露營.pdf	pdf	2.68 MB	完成	MaiAgent Parser (預設)	2025-08-18 17:37:43	一般會員 教學		<input type="button"/>
c1a800a3-d...	產品搭配使用情境.pdf	pdf	5.59 MB	完成	MaiAgent Parser (預設)	2025-08-18 17:37:43	VIP		<input type="button"/>

After completion, you will see the metadata you just added appear in the field.

## Adding Metadata to FAQs

Enter the FAQ management interface within the knowledge base, select the FAQ to edit, and click the edit button

Switch to the metadata page, enter information and click add metadata

After completing all entries, click "Confirm"



The added metadata will appear in the FAQ list

The screenshot shows a user interface for managing a knowledge base. On the left, there's a sidebar with links: '基本' (Basic), '標籤管理' (Label Management), '文件' (File), 'FAQ 常見問題' (FAQ Common Questions) which is highlighted in blue, and '搜尋測試' (Search Test). The main area has a search bar at the top with placeholder text '請輸入問題或答案內容、ID'. Below it is a button '批量刪除' (Batch Delete) and a '重置篩選' (Reset Filter) button. There's also a '+ 建立 FAQ' (Create FAQ) button and a refresh icon. A table lists two FAQ entries:

答案	標籤	元資料	命中次數	操作
僅能使用 Apple Pay，其他...	VIP   一般會員	url: https://www.google.com	1	
信用卡：3-7個工作天 ATM...			3	

At the bottom right of the main area, there are buttons for '共 2 條資料' (2 items total), '10 條/頁' (10 items per page), and a blue circular icon with a white speech bubble.

## Custom URL Mapping

`url` is a reserved word in the metadata system. If you set `url: https:// ... your specified URL`, the URL you set will override the original file location when viewing reference snippets in conversations, and will instead open your specified URL.

### Example Scenario: Brand Spring Promotion Campaign

#### Original Settings:

```
title: "2025 Spring Big Promotion Details"
content: "This campaign includes 20% off storewide, free gifts with purchase, and many other offers ... "
url: https://www.yourstore.com/spring-sale-2025
```

**Usage Effect:** When users ask "What offers are in the spring promotion?" in the conversation:

The AI will reference this knowledge snippet to answer the question

When users click the reference source, it won't open the internal file location

Instead, it will directly jump to <https://www.yourstore.com/spring-sale-2025> official campaign page

Users can immediately see the latest campaign details, purchase buttons, countdown timers, and other dynamic content

#### Practical Scenarios:

**Website Announcements:** `url: https://www.company.com/announcements/system-maintenance`

**Product Specifications:** url: <https://www.product.com/specs/model-x1>

**Customer Service Policies:** url: <https://support.company.com/return-policy>

**Event Registration:** url: <https://events.company.com/register/webinar-2025>

The advantage of this setup is making AI responses more practical — not just providing information, but also guiding users directly to relevant pages to take action, improving user experience and conversion rates.

## Before Setting URL

As shown below, before setting the URL value, when clicking on reference nodes, clicking any node (e.g., Beginner Camping.pdf) allows viewing the original document (you can set whether to allow users to download original document files on the conversation platform):

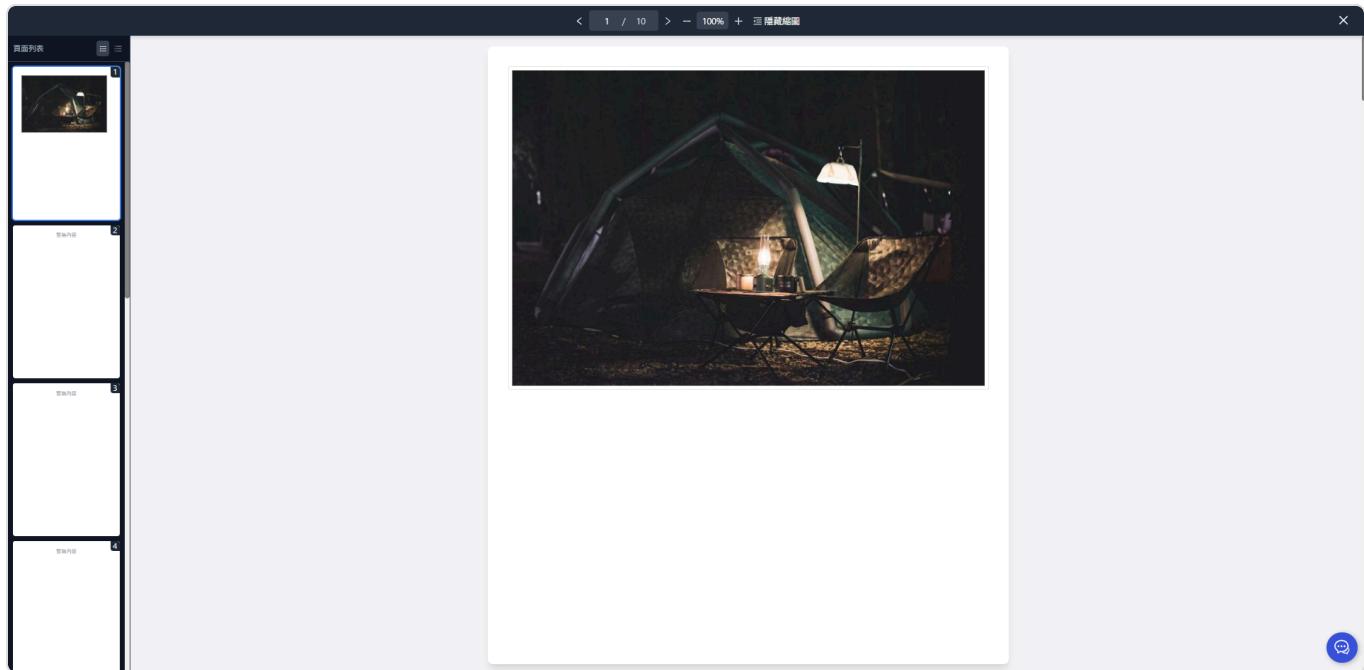
### Conversation Platform - Allow Download of Referenced Documents Setting

The screenshot shows a conversation interface with a sidebar on the left containing various search and filter options. On the right, there is a list of nine referenced documents, each with a preview, file name, and a download icon. The documents are as follows:

- #1 初級露營.pdf
- #2 初級露營.pdf
- #3 初級露營.pdf
- #4 初級露營.pdf
- #5 初級露營.pdf
- #6 高階露營.pdf
- #7 高階露營.pdf
- #8 高階露營.pdf
- #9 露營注意事項.txt

At the bottom of the sidebar, it says "已選擇 6 個參考文件".

View reference nodes



[View original file location](#)

## After Setting URL (Using Google as Example)

The screenshot shows a file management interface with a modal window open. The modal is titled "露營注意事項.txt" and contains tabs for "標籤" and "元資料". The "元資料" tab is selected, showing the current metadata. It includes a field for "url" with the value "https://www.google.com", which has edit and delete icons next to it. Below this is a section for adding new metadata, with fields for "鍵名" and "數值", and a button to "新增元資料". A note at the bottom explains that metadata can store extra information like authors and versions, and that the "url" placeholder will be overridden if used. At the bottom right of the modal are "取消" and "確定" buttons.

When clicking on the referenced node file (Camping Precautions.txt) again, it will not display the document preview, but instead override to open the Google homepage:

When you set the `url` field in metadata, users can directly click to jump to your set link when they see the AI assistant referencing that document in conversations, obtaining more complete information

# Search Testing

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## Why is Search Testing Needed?

### Ensure Response Accuracy

The quality of AI assistant responses directly impacts customer satisfaction

Incorrect or irrelevant answers can damage brand trust

### Avoid Information Omissions

Prevent important product details or safety instructions from being overlooked

Optimize knowledge base usage efficiency

### Improve Answer Consistency

Ensure the same question receives consistent answers at different times

Avoid response instability caused by knowledge base updates

Through search testing and fragment preview features, you can view the quality of data fragments used by the AI assistant in real-time, ensuring your Q&A standards.

## How to Get Started?

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Enter the knowledge base page, select the knowledge base you want to view and enter settings

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After entering, click on Search Test to access the page

Enter the content you want to search in the dialog box: "What should I pay attention to when choosing a campsite?", and after pressing the search button, the AI assistant will search for the most relevant documents based on your conversation content.

The screenshot shows a search interface with a sidebar on the left containing navigation links: 基本 (Basic), 標籤管理 (Label Management), 文件 (File), FAQ 常見問題 (FAQ Common Questions), and 搜尋測試 (Search Test). The main area has a search bar with placeholder text '輸入搜尋內容，測試知識庫的回傳效果' (Enter search content, test knowledge base's response effect) and a search button labeled '搜尋' (Search). The results section is titled '三 搜尋結果 [12]' (Three Search Results [12]). It displays 12 fragments of text, each starting with a small blue icon, the word count '字數: 2196', and the number of hits '命中次數: 0'. The fragments cover various aspects of mountain climbing, such as altitude, weather, equipment, and safety tips.

## View search results

The right side will display the fragments that the AI assistant will retrieve when answering. As shown in the image, there are 12 fragments (for retrieval fragment count settings, please refer to: [How to Create a Knowledge Base: Basic Settings](#))

This screenshot is identical to the one above, showing the search interface and results. A red box highlights the '三 搜尋結果 [12]' (Three Search Results [12]) section, which contains the 12 retrieved fragments. The fragments are identical to those in the first screenshot, providing detailed information about mountain climbing conditions and safety.

The right side shows the retrieved content used to answer this question. Each fragment displays:

Word count: The number of words covered by the fragment

Hit count: The number of times the AI assistant referenced this fragment when answering (only counts official Q&A, test Q&A is not included in hit count calculations)

Higher hit counts indicate that users ask more questions about this fragment.

Search testing records past test Q&A sessions, allowing you to quickly select historical records to retest and ensure the same topics maintain or improve data reference quality.



## Checking Knowledge Fragment Quality

Through search testing, you can determine which fragments the AI assistant uses during reasoning, and then check whether the content of these fragments needs optimization, such as:

If you find many blank fragments in the search results, and these blank fragments all belong to the "[Beginner Camping.pdf](#)" file, you can check whether the content of "[Beginner Camping.pdf](#)" is all correct and update it in time **before official deployment**.

## Search Testing Helps You

### Regularly Test Important Questions

Recommend frequently testing core business-related questions

Perform retesting after knowledge base updates

Record and compare improvement in test results

### Identify Content Gaps

Discover knowledge gaps: Test common questions to find queries with no matching results

Example: Testing "tent waterproof rating explanation" finds no relevant fragments → need to supplement waterproof specification documents

### Evaluate Content Completeness

Check answer depth: Confirm whether AI answers cover all aspects of the question

Example: Query "camping safety precautions" → Check whether it covers all aspects such as weather, wildlife, fire safety, etc.

## Question Testing Techniques

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You can:

Ask the same question in different ways

Test complex scenarios and multi-condition queries

Verify the retrieval effectiveness of professional terminology and product names

Through these testing techniques, comprehensively evaluate the accuracy and completeness of responses.

## Deploy Your AI Assistant

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# Choose Integration Platform

MaiAgent's AI assistants can be integrated with different types of conversation platforms according to actual needs, flexibly applied for both external services and internal support for colleagues. Below are definitions and usage descriptions for various integration methods:



## System Default Platform Interfaces

When an AI assistant is created, the system automatically creates the following three platform interfaces for you:

**API:** Provides a programmatic interface for developer integration

**Web:** Built-in web conversation interface that can be directly embedded into websites

**Internal:** Q&A platform for enterprise internal staff

### ## External Public Launch

Suitable for external services, making the AI assistant the first point of contact for enterprise external communication:

#### Integration Platform: Website

**Features:** Embed the AI assistant into the corporate website

**Application Scenarios:** Instantly respond to visitor inquiries, provide product information, service descriptions, frequently asked questions, etc.

**Advantages:** 24/7 online customer service, enhancing website conversion rates

#### Integration Platform: LINE

**Features:** Integrate with the enterprise LINE official account

**Application Scenarios:** Provide customer service, user interaction, and other functions through the widely familiar LINE communication interface

**Advantages:** Reach a vast LINE user base, lower customer usage barriers

#### Integration Platform: FB Messenger

**Features:** Connect to Facebook fan page Messenger

**Application Scenarios:** Instantly respond to customer questions through social media platforms, handle order inquiries, event Q&A, etc.

**Advantages:** Integrate social media marketing, enhance fan interaction rates

## **Integration Platform: Telegram**

**Features:** Create a Telegram Bot to provide customer service

**Application Scenarios:** Support personal conversations and group discussions, suitable for technical communities and international customer service

**Advantages:** Simple connection setup, intelligent group responses, support for conversation reset and other practical features

## **Internal Use Only**

Suitable for enterprise internal knowledge queries and process support, enhancing team efficiency:

## **Internal Q&A**

**Features:** AI assistant for internal staff use only

**Application Scenarios:**

Connect to internal documents or policy databases

Support employees in quickly querying company systems and process descriptions

Human resources regulations, SOP operation guide queries

New employee training support

**Advantages:** Become the enterprise's intelligent knowledge hub, reducing repetitive consultation work

## **API Integration Applications**

**Features:** Integrate into enterprise internal systems through API

**Application Scenarios:**

Integrate with ERP and CRM systems

Connect to internal workflow platforms

Develop customized applications

**Advantages:** Deep integration with existing systems, providing a seamless user experience

# Internal Q&A Features

## Introduction to Internal Q&A

### 💬 Conversation Block

Real-time Q&A interaction with AI Assistants

### 📋 Historical Conversation Records

View and manage all past conversation records

### 🤖 AI Assistant Selection

Switch between different AI Assistants for conversation

### ⚙️ AI Assistant Settings

Real-time adjustment of current conversation AI Assistant settings, including permissions and tool configuration

### 📚 Knowledge Base Document Management

Precisely control the scope of documents that AI Assistants can reference in each conversation

The screenshot displays the internal Q&A application's main dashboard. On the left, there's a sidebar with navigation links like 'MaiGPT', 'AI 功能', 'AI 助理', '知識庫', '工具', '爬蟲', '客服對話', '所有對話', '對話平台', '聯絡人', '內部問答' (selected), and '組織設定'. The central area shows a 'Conversation Block' with a dropdown menu for '全螢幕嵌入示範' and a '選擇 AI 助理' button. Below it is a 'Knowledge Base Document Management' section with a '知識庫文件管理' button. To the right, there are two panels: one for '文件 (12)' containing a list of 12 files related to camping, and another for 'FAQs (5)'.

## How to Use Internal Q&A?

### 1. Access the Internal Q&A Page

The screenshot shows the MaiGPT AI Assistant interface. On the left, there's a sidebar with various sections: 'MaiGPT', 'AI 功能', 'AI 助理', '知識庫', '工具', '爬蟲', '客服對話', '所有對話', '對話平台', '聯絡人', '內部問答' (which is highlighted with a blue box), and '組織設定'. The main area has tabs for '新建問答' and '全螢幕嵌入示範'. On the right, there's a file manager window titled '文件 (12)' showing a list of 12 files under '露營資料庫', including '氣氛燈-系列.md', '露營注意事項-帳篷-LED煤油燈帶了嗎-露營裝...', and '新手露營如何準備-一篇帶你認識露營基本概念...'. There are also buttons for '顯示標簽過濾', '全選所有文件', '搜尋文件名稱, 或標籤', and '取消全選此庫'.

## 2. Select the AI Assistant You Want to Converse With

You can select the AI Assistant you want to converse with from the **blue dropdown menu** in the upper left corner.

This screenshot is identical to the one above, showing the MaiGPT AI Assistant interface. The only difference is that the 'New Q&A' button in the sidebar is highlighted with a blue box, indicating it's the active or selected option.

## 3. Start Conversation

**Continue Past Conversation:** Select the topic you want to continue from the past Q&A topics on the left side.

**Start New Conversation:** Click "**New Q&A**" in the left section to start a completely new conversation.

All conversations will appear in the Q&A records in the upper left corner

After selecting a conversation, you can enter your question in the text box below to start the conversation.

The screenshot shows the MaiGPT AI Assistant interface. On the left, there's a sidebar with categories like 'MaiGPT', 'AI 功能', 'AI 助理', etc. A '內部問答' (Internal Questions) section is highlighted. In the center, a conversation history is displayed with various questions and their responses. On the right, there's a '文件 (12)' (Files) panel showing a list of 12 files related to camping, such as '露營燈-系列.md', '露營注意事項-帳篷-LED煤油燈帶了嗎-露營裝...', and '露營注意事項.pdf'. There are also buttons for '顯示標簽過濾' (Show Label Filter), '全選所有文件' (Select All Files), and a search bar.

Continue Past Conversation (Select Conversation)

This screenshot is identical to the one above, showing the MaiGPT AI Assistant interface with a conversation history and a file management panel on the right side.

Start New Conversation (New Conversation)

## 4. Customize Document Reference Scope (Optional)

Use the knowledge base management function on the right side to select specific documents for the AI Assistant to reference in this conversation.

Each message can freely select reference documents and FAQs

Can be reconfigured before sending each Q&A

## Document Access Scope

All documents are available when the first message is sent, including "Ambient Light-Series.md"

AI Assistant responds after referencing: "Document content: The official website has been closed and no longer sells any products to the public"

Uncheck "Ambient Light-Series.md" when sending the second message

AI Assistant cannot reference it and responds: "I cannot find the specific content of the 'Ambient Light-Series.md' file."

The screenshot shows the MaiAgent interface. On the left, a sidebar lists various user inputs. In the main area, the AI Assistant has responded with a message from 'Internal\_Search\_Tool' stating: '我再次查找「氣氛燈-系列.md」檔案的內容。' Below this, it says: '根據我再次搜尋知識庫的結果，我無法找到「氣氛燈-系列.md」檔案的具體內容。從搜尋結果來看，知識庫中包含的資料主要是：' followed by a numbered list of items. To the right, a file browser panel shows a list of 12 files under '露營資料庫', with several checkboxes checked. A blue button at the bottom right of the interface says '非會員'.

## FAQs Access Scope

All FAQs are available when the first message is sent, including "What is the operating principle of LLM?"

AI Assistant responds with relevant answer after referencing

This screenshot is similar to the previous one but shows a different state. The AI Assistant's response now includes a link to a FAQ: '請參考 FAQ 告訴我 LLM 的運作原理'. The file browser panel on the right shows a list of 5 FAQs under '露營資料庫'. A blue button at the bottom right says 'VIP'.

Uncheck "What is the operating principle of LLM?" when sending the second message

AI Assistant cannot reference "What is the operating principle of LLM?" and responds "I cannot find information about LLM operating principles in the FAQ"

The screenshot shows the AI Assistant's main interface. On the left, there's a sidebar with various categories like 'MaiAgent', 'AI 功能', 'AI 助理', etc. The main area displays a search result for 'FAQ' with a title '請參考FAQ，告訴我 LLM 的運作原理是甚麼'. Below it is a '全螢幕嵌入示範' section with a dropdown menu for '已使用知識庫' and '工具回應 Internal\_Search\_Tool'. A note says '很抱歉，根據我搜尋知識庫的結果，我無法找到 FAQ 中關於 LLM 運作原理的相關資訊。' A list of items follows: 'MaiAgent 概述頁面的 HTML 代碼', '露營相關的 PDF 文件', and '瓦斯罐產品相關資訊'. A note at the bottom says '但沒有包含 FAQ 中關於 LLM 運作原理的內容。如果您需要了解 LLM 的運作原理，建議您：1. 查閱相關的技術文檔'. At the bottom of the main area, there are buttons for '1 個新訊息' and '請輸入您想問的問題'. On the right, there's a sidebar titled '文件 (12)' with a '顯示標籤過濾' button. It lists several files under '露營資料庫': 'MaiAgent 的概述頁面長怎樣啊?', 'LLM 的運作原理是甚麼?', '我不會用 MaiAgent 怎麼辦', '線上支付方式有哪些', and '取消訂單後多久會退款'. There are also buttons for 'VIP' and '一般會員'.

## Tag Filtering

You can use the tags set in the knowledge base to filter the document content you want to make available to the AI Assistant:

For tag settings, please refer to: [Document Management: Tags and Metadata](#)

a. Click "Show Tag Filter" in the upper right corner

This screenshot shows the same interface as above, but with a blue circle highlighting the '顯示標籤過濾' button in the top right corner of the sidebar. The sidebar also shows a list of selected files under '露營資料庫': '氣氛燈-系列.md', '露營注意事項-帳篷-LED煤油燈帶了嗎-露營裝...', '新手露營如何準備-一篇帶你認識露營基本概念...', '野餐準備全攻略-一篇掌握用品-食物與遊戲清單...', '新手露營如何準備-一篇帶你認識露營基本概念...', '露營注意事項-帳篷-LED煤油燈帶了嗎-露營裝...', '初級露營.txt', '露營注意事項.txt', and '露營注意事項.pdf'. There are also 'VIP' and '一般會員' buttons at the bottom.

b. Select AND or OR filter conditions, click the "AND" text to switch

The screenshot shows the AI Assistant's search results for '露營燈'. On the left, a sidebar lists various search terms and their descriptions. In the center, a card displays a PDF titled '露營燈-系列.pdf' with a summary of its content. On the right, a sidebar titled '標籤過濾' (Label Filter) shows a group of filters applied: 'AND' (滿足所有標籤) with '教學' (Teaching) and '一般會員' (General Member) selected. Below this, a section for '組間關係' (Group Relation) is set to 'OR' (滿足任一組的條件). The sidebar also includes a search bar and a message icon.

### c. Add tags

Using "AND" filter

Documents: Only "Advanced Camping.pdf" meets all conditions and can be referenced by AI Assistant

FAQ: No FAQ meets all conditions simultaneously, so none are displayed

Tag filtering will be applied to both documents and FAQ content simultaneously

This screenshot shows the same setup as the previous one, but with more filters applied in the sidebar. The '標籤過濾' (Label Filter) now includes '教學' (Teaching), '一般會員' (General Member), '+非會員' (+Non-Member), and '+VIP'. The '組間關係' (Group Relation) is still set to 'OR'. The search results remain the same, with no FAQs displayed due to the 'AND' filter.

## 5. Real-time AI Assistant Settings Adjustment (Optional)

Through "AI Assistant Settings" in the upper right, you can modify permissions, tools, and other configurations in real-time.

The screenshot shows the AI Assistant's main interface. On the left, there's a sidebar with various user requests like '請參考『氣氛燈』這個檔案...' and 'MaiAgent 怎麼用'. The main content area displays a search result for '4. 氣氛燈-系列.md', showing its content which includes a note about the website being closed and no longer selling products. Below this is an 'HTML 內容' section with a link to '5. MaiAgent 概述頁面'. A '主要涵蓋領域' section lists categories such as '營銷教學' and '產品資訊'. A note at the bottom says '這些是我目前能夠搜尋和參考的主要資料來源。' At the bottom of the main content, there are download links for '初級露營.pdf' and '引用節點'. A button labeled '告訴我 LLM 的運作原理' is also present. On the right side, there's a '標籤過濾' (Tag Filtering) panel where users can filter files by tags like '教學' and '一般會員'. Below it is a '文件 (1)' (File (1)) panel showing a selected file named '進階露營.pdf' under '露營資料庫'. A blue circular icon with a message bubble is located in the bottom right corner of the main interface.

After clicking, a right-side popup window will appear, allowing you to freely edit the required permissions, tools, etc.

This screenshot shows the 'AI Assistant Settings' dialog box overlaid on the main interface. The dialog has tabs for '基本' (Basic), '模型設定' (Model Settings), '回答模式設定' (Response Mode Settings), '工具' (Tools), and '權限設定' (Permissions). The '基本' tab is active, showing sections for '已使用知識庫' (Used Knowledge Base) and 'API 設定' (API Settings). It lists '全螢幕嵌入示範' as the current knowledge base and provides options for '回應品質控管' (Response Quality Control), 'Webhook' (Webhook), and '使用分析' (Use Analysis). The '權限設定' tab is also visible. The background of the main interface shows the same search results and sidebar as the previous screenshot.



## Usage Tips

## **Conversation Management**

Make good use of historical conversation records to quickly return to previous discussions

New Q&A is suitable for starting completely new topics

## **Document Control Precision**

For specific questions, limit reference documents to get more precise answers

Avoid irrelevant documents interfering with the AI Assistant's judgment

## **Flexible Settings Adjustment**

Adjust AI Assistant capabilities in real-time for different conversation scenarios

Test the impact of different settings on answer quality

# Web Chat Introduction Overview

## 1. What is WebChat?

You can embed AI assistants created in MaiAgent into your website to provide real-time customer service or other conversations. Web Chat features **responsive design, perfectly adapting to desktop, tablet, and mobile devices.**

MaiAgent currently offers the following two embedding methods:

### 1. Bottom-Right Corner Embedding

Embed into your official website as a built-in intelligent assistant

Does not interfere with normal user browsing, available anytime when needed

Suitable for general customer service and consultation services



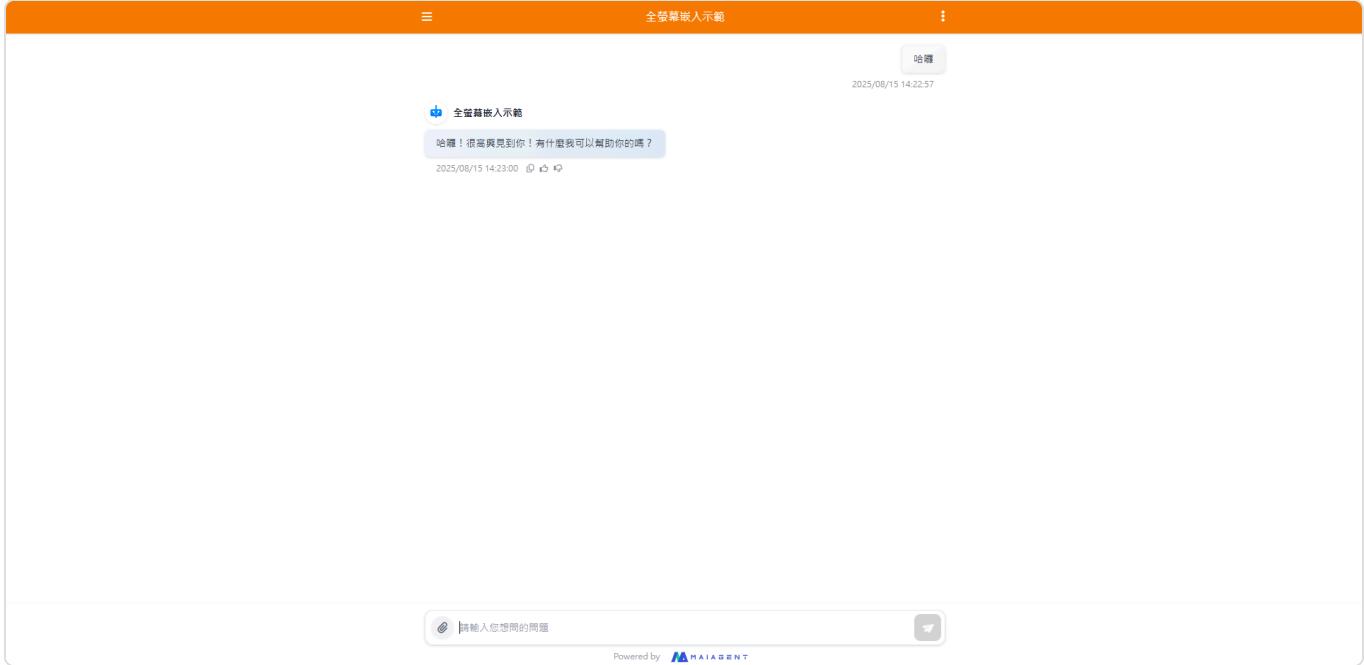
Bottom-right corner embedding (draggable window)

### 2. Full-Screen Embedding

Provides a complete conversation experience

Suitable for complex consultation and service processes

Customizable design to meet enterprise needs



Full-screen embedding example

This design brings:

**Real-time response:** Visitors receive professional answers immediately without waiting, enhancing user experience

**Convenience:** Bottom-right floating design doesn't interfere with normal browsing, available anytime when needed

**Cost-effectiveness:** AI assistant provides 24/7 service, significantly reducing labor costs

**Professional image:** Demonstrates the company's technological strength and service quality

## 2. Building a Corporate-Style Web Chat Service

MaiAgent provides customization features such as custom LOGO, avatar, Q&A theme colors, etc., to help you build a corporate-style Web Chat service

You can create your own Web Chat appearance by:

Selecting assistant display name

Uploading your corporate LOGO

Selecting AI assistant display avatar

Selecting Web Chat theme color

Selecting message background color for AI assistant replies



Default style

Customized style

This way, you can build a Web Chat service that aligns with your corporate color scheme and style



### 3. Message Customization

When first entering the Web Chat service, you can freely customize your AI assistant's opening message based on the following scenarios.

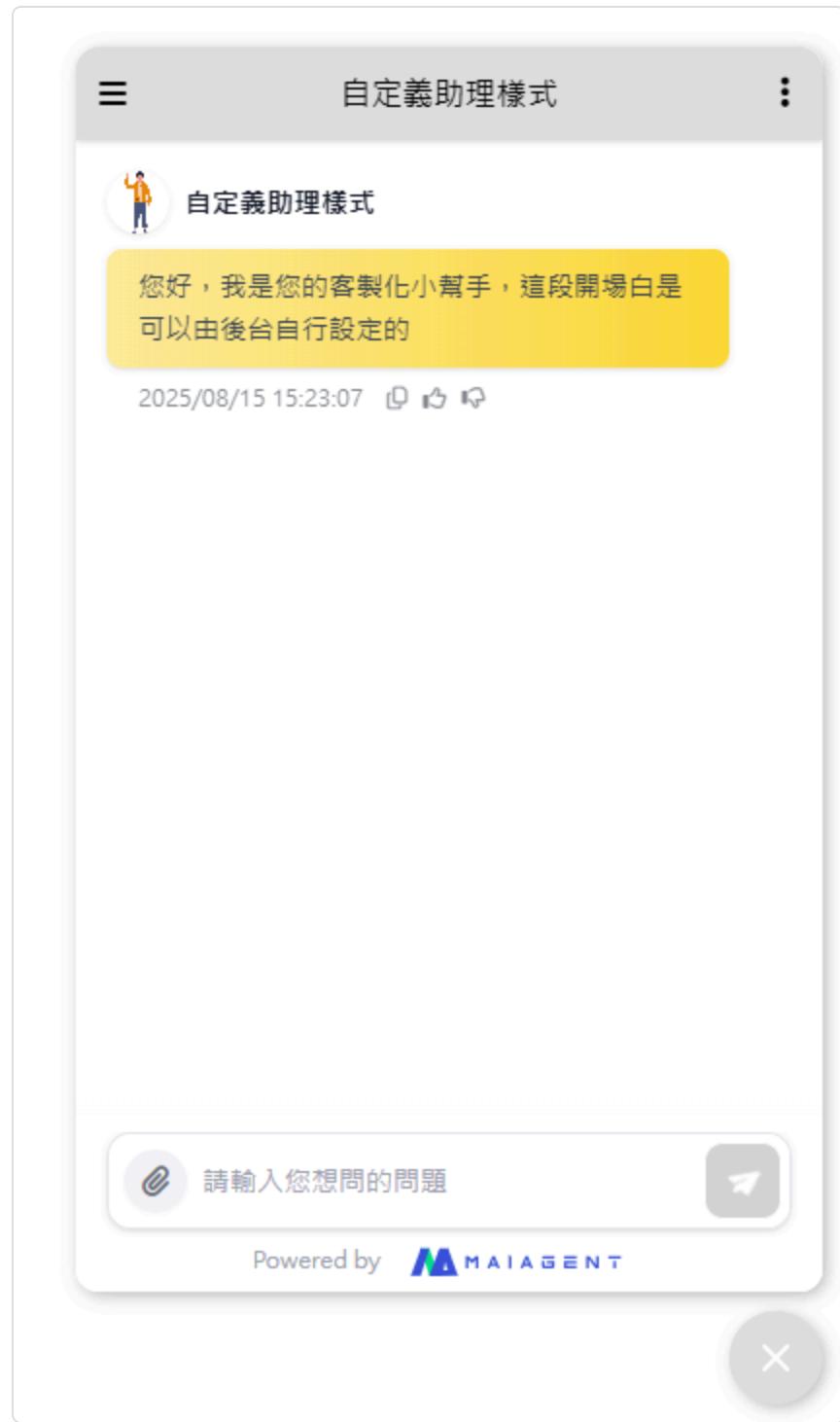
#### 1. Opening Message Customization

##### Branded Greeting

Set: "Welcome to our website! I am your dedicated customer service assistant" to showcase the company's professional image and friendly service attitude

##### Guided Opening

Set: "I can help you inquire about product information, answer usage questions, and assist with order processing" to clearly inform users of the available service scope, building user trust in service capabilities



Customize opening message

## 2. Guided Starter Questions

Set "**conversation starter questions**" as quick options

Users can directly click common questions without typing

**Example questions:**

"How to view ordered items?"

"How to place an order"

"Member points rules"

"Business hours"

Users can start conversations by clicking starter questions, accelerating the Q&A process:



Starter question setup example



Users click to start conversation

## 4. Diverse Q&A Content

### 1. Multi-Language Support

Responds in the user's language, eliminating communication barriers.

**Auto-detection:** Selects assistant reply language based on user input language



### Manual switching:

Use the Web Chat interface to select language, see: [Multi-Language Support: Web Chat Settings](#).

Use Web Chat initialization script (javascript) to specify AI assistant reply language, see: [Technical Manual—Web Chat Initialization](#).

For supported language list, see: [Multi-Language Support: Supported Language List](#)

## 2. Multimodal Q&A

In addition to text Q&A, the AI assistant can also support different types of file uploads:

Spreadsheets: .xls, .xlsx, .csv, .ods

Document files: .doc, .docx, .odt, .pdf, .md, .txt

Presentation files: .ppt, .pptx, .odp

Web documents: .html, .htm

Data formats: .json, .jsonl

Audio files: .wav, .mp3

You can disallow users from uploading attachments, using only text for conversations to ensure conversation security.

## Image Content Processing

### Image Recognition and Analysis

**Upload image analysis:** Users can upload product images, AI automatically identifies and provides relevant information

**Screenshot processing:** Supports screenshot analysis to help resolve usage issues

**Image description:** Automatically generates image content descriptions and related suggestions

### Image Reply Function

**Product image display:** Includes actual product images in replies

**Operation guide images:** Provides step-by-step operation screenshots

Examples:

User asks where to set up MaiAgent assistant, assistant responds with settings screen image

User takes screenshot to confirm path with assistant, assistant correctly interprets and responds



## MaiAgent 客服助理



「對話平台」，選擇您想設定的 AI 助理，然後點選「操作」圖示進入對話平台配置。

以下圖片說明設定位置：

The screenshot shows the MaiAgent AI Assistant configuration interface. At the top, there's a blue header bar with the MaiAgent logo and a menu icon. Below the header, a text instruction says: '「對話平台」，選擇您想設定的 AI 助理，然後點選「操作」圖示進入對話平台配置。' A note below it says: '以下圖片說明設定位置：'. The main area is a sidebar titled 'AI 助理 / 配置' with a 'Basic' tab selected. The sidebar includes icons for 'AI Assistant', 'Conversation', 'FAQ', 'Crawler', 'Feedback Evaluation', 'Overview', and 'Associate Platform'. At the bottom of the sidebar, it says 'MaiAgent 客服助理'. In the center, there's a search bar with placeholder text '請輸入您想問的問題' and a send button. At the bottom, it says 'Powered by MAIA GENT'.

Assistant responds with image



Assistant interprets user screenshot content

## Document Processing Capability

### Supported Document Formats

**PDF documents:** Automatically parses PDF content and answers related questions

**Word documents:** Processes .doc/.docx format documents

**Excel spreadsheets:** Analyzes spreadsheet data and provides insights

**PowerPoint presentations:** Extracts presentation content and answers questions

## Document Interaction Functions

**Document content query:** Answers specific questions based on uploaded documents

**Data analysis:** Automatically analyzes table data and provides statistical information in table format

**Document summary:** Generates key content summaries of long documents

**Example 1: Ask AI assistant to present data content in table format and provide reference links**

The screenshot shows a mobile application interface for an AI assistant. At the top, there's a brown header bar with three horizontal dots on the left and a vertical ellipsis on the right. The main content area has a light gray background. A user message at the top asks the AI to "請用表格幫我整理 LLM 現有的服務，並給予參考連結，表格不要超過三格". Below this is a timestamp: "2025/08/15 16:46:01". The AI's response is a table titled "預設助理樣式" (Default Assistant Style) with two columns: "服務提供商" (Service Provider) and "主要LLM服務" (Main LLM Services). The table lists three providers: OpenAI, Google, and Anthropic, each with its respective service offerings. A note below the table states: "這個表格涵蓋了目前最主要的三個LLM服務提供商，包含了消費者和開發者都能使用的服務選項。" At the bottom, there's a footer with "Powered by MAIAGENT" and a large circular close button with an 'X'.

服務提供商	主要LLM服務
OpenAI	GPT-4, GPT-3.5, ChatGPT, AI
Google	Gemini (原Bard), PaLM API, V
Anthropic	Claude系列模型, Claude API

Organize information in table format



## 預設助理樣式



請用表格幫我整理 LLM 現有的服務，並給予參考連結，表格不要超過三格

2025/08/15 16:46:01



### 預設助理樣式

	參考連結
API服務	<a href="https://openai.com">https://openai.com</a>
Vertex AI	<a href="https://ai.google.dev">https://ai.google.dev</a>
	<a href="https://www.anthropic.com">https://www.anthropic.com</a>

這個表格涵蓋了目前最主要的三個LLM服務提供商，包含了消費者和開發者都能使用的服務選項。

2025/08/15 16:46:04



請輸入您想問的問題



Powered by  MAIAgent



Provide external links

Example 2: Ask assistant to analyze sales content and provide table analysis

The screenshot shows a mobile application interface for an AI assistant. At the top, there's a dark brown header bar with three white dots on the left, the text "預設助理樣式" (Default Assistant Style) in the center, and three white dots on the right. Below the header is a white navigation bar with a blue circular icon containing a white hand-like symbol, followed by the text "預設助理樣式".

The main content area has a light blue background. It displays the following text:

```
<internal_tool_search>  
銷貨內容.xlsx  
</internal_tool_search>
```

根據銷貨內容.xlsx的數據，我為您提供詳細的  
表格分析：

**銷貨內容分析報告**

**原始數據表格**

品項	售價(元)	銷貨數量(件)
礦泉水	10	100
牛奶	20	30
蘋果	40	20
總計	-	<b>150</b>

At the bottom of the main content area is a white input bar with a blue speech bubble icon on the left, the placeholder text "請輸入您想問的問題" (Please enter your question), and a grey send button with a white arrow icon on the right.

Below the input bar is a footer bar with the text "Powered by MAIAGENT" and a small blue logo. On the far right of the footer is a dark brown circular button with a white "X" icon.

Example 3: Upload docx file, ask assistant to help analyze CV writing issues

The screenshot shows the AI Assistant interface with the following details:

- Header:** 預設助理樣式 (Pre-defined Assistant Style) with a menu icon.
- Profile:** 預設助理樣式 (Pre-defined Assistant Style) with a blue robot icon.
- Text Content:** 根據文件 **cv\_revised\_01082025.docx**, 我發現以下幾個問題：
- Section Header:** 格式與結構問題
- List:**
  1. 重複內容：CV中有大量重複的段落和內容，特別是工作經驗部分出現多次重複
  2. 排版混亂：文件中有許多格式不一致的地方，段落間距和縮排不統一
  3. 參考人資訊不完整：References部分只有空白的表格框架，沒有填入實際的聯絡人資訊
- Section Header:** 內容問題
- List:**
  1. 時間邏輯錯誤：
    - 目前工作經驗顯示"Aug. 2025 -- Now"，但這是未來的日期
- Input Field:** 請輸入您想問的問題 (Please enter your question)
- Powered by:** MAIA GENT
- Close Button:** A circular button with an 'X' symbol.

AI assistant uses Markdown format to reply, organizing response content in an orderly manner.

## 5. Conversation History and Sharing

### 1. Conversation History Memory

To provide a continuous service experience, WebChat automatically remembers user conversation history, allowing each conversation to build on previous interactions.

### Memory Content Scope

**Conversation content:** Complete Q&A records, including text, images, documents, etc.

**Service status:** Unfinished queries, pending issues

Users can view past conversation records in the left conversation list of Web Chat or start a new conversation

The screenshot shows a WebChat interface with a summary of a previous conversation and a list of improvement suggestions.

**預設助理樣式**

- "Japanese(mediant)" 應該是 "Japanese(intermediate)"
- 部分句子文法不夠流暢，如"in charge of technique explanation and helps"

3. 技術細節不夠具體：

- 缺乏具體的專案成果量化數據
- 技術技能描述過於簡單，缺乏深度

**建議改善**

1. 清理重複內容，確保每個部分只出現一次
2. 統一格式和排版
3. 修正時間邏輯錯誤
4. 完善參考人資訊
5. 改善英文表達的準確性
6. 增加更多量化的成果描述

2025/08/15 16:49:54

Powered by MAIA GENT



Conversation memory function can be used for:

**Continuous consultation:** User asks "What was the tent model you recommended last time?", AI can immediately recall and answer

**Progress tracking:** User says "Continue the previous order inquiry", AI automatically retrieves relevant information

**Personalized service:** Provides more accurate recommendations and suggestions based on conversation history

## 2. Conversation Sharing

When you want to share a conversation with friends or colleagues after consulting the AI assistant, or when internal teams need to collaborate on customer issues, you can use MaiAgent service to generate conversation sharing links:

The screenshot shows the MaiAgent AI assistant interface. At the top, there's a navigation bar with three horizontal lines, the text '預設助理樣式' (Default Assistant Style), and a red-bordered '分享' (Share) button. Below the navigation bar, a message says '根據文件 cv\_revised\_01082025.docx，我發' followed by '現以下幾個問題：' (Found the following several problems:). A section titled '格式與結構問題' (Format and Structure Problems) lists three items:

1. 重複內容：CV中有大量重複的段落和內容，特別是工作經驗部分出現多次重複
2. 排版混亂：文件中有許多格式不一致的地方，段落間距和縮排不統一
3. 參考人資訊不完整：References部分只有空白的表格框架，沒有填入實際的聯絡人資訊

Below this, another section titled '內容問題' (Content Problems) lists one item:

1. 時間邏輯錯誤：
  - 目前工作經驗顯示"Aug. 2025 -- Now"，但這是未來的日期
  - 學業預計2026年畢業，但已經有2025年的工作經驗

At the bottom left is a search bar with a magnifying glass icon and the placeholder '請輸入您想問的問題' (Please enter the question you want to ask). To the right of the search bar is a blue 'GO' button with a white arrow. At the very bottom center is the text 'Powered by MAIAGENT' with the MaiAgent logo.



預設助理樣式

分享



根據文件 **cv\_revised\_01082025.docx**，我發現以下幾個問題：

## 格式與結構問題

分享對話的公開連結 X

<https://chat.maiagent.ai/web-chats/1ccd7cae-bfaa-47a2-a242-8b062f0a5a53/conversations/f4646896-07f2-42c0-8ebf-d70e0a29cf60/share>

複製連結

### 1. 時間邏輯錯誤：

- 目前工作經驗顯示"Aug. 2025 -- Now"，但這是未來的日期
- 學業預計2026年畢業，但已經有2025年的工作經驗



請輸入您想問的問題



Powered by

 MAIAGENT

X



## Shared Content

**Complete conversation records:** Includes all text, images, documents, etc.

**Conversation summary:** Automatically generates conversation highlights summary

**Related resources:** Product links, documents mentioned in the conversation, etc.

Conversation record sharing can be used for:

**Customer sharing:** "This camping equipment recommendation is great, sharing with the mountaineering club"

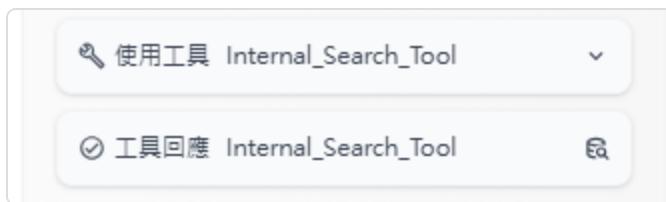
**Internal collaboration:** Customer service staff shares complex issues with technical support team

**Training purposes:** Shares typical conversation cases for employee training materials

## 6. Choose Whether to Display Tool Usage and Referenced Document List

### 1. Display Tool Usage List

You can choose whether to let users see the list of tools used by the AI assistant during reasoning. If allowed, the AI assistant will display the following screen when generating responses:



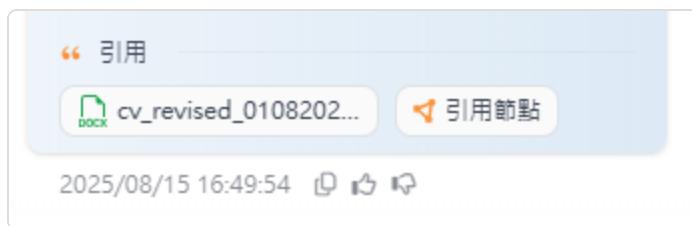
You can track whether the tool content used by the AI assistant is correct through this list.

### 2. Display Referenced Document List

Each AI answer automatically generates a referenced document list, clearly indicating information sources, enhancing the credibility and traceability of answers.

#### Display Settings

Enterprises can configure whether to let users see the referenced tool list and reference document name content according to their needs. If display is enabled, the following list will appear at the bottom of the AI assistant's response. Click "Citation Node" to see the referenced document excerpts:



Depending on different usage scenarios, you can choose whether to disclose citation information:

**Public customer service:** Display all citation information to build trust

**Internal support:** Hide sensitive documents to protect confidential information

**Educational institutions:** Display learning resources for student reference

## 7. Conversation Permission Protection - Secure and Controllable Conversation Environment

### 1. Login Function Settings

#### Mandatory Login Mechanism

To ensure the security and controllability of conversation content, enterprises can enable the login function, requiring users to log in before using the AI assistant service. After configuration, when visitors click WebChat, they will first enter the login page, and only successfully logged-in users can start conversations with the AI assistant.

#### Security Advantages

**Identity verification:** Ensures each conversation user has a clear identity

**Access control:** Provides corresponding service content based on user identity

**Conversation tracking:** Completely records each user's conversation history

**Data protection:** Prevents unauthorized users from accessing sensitive information

### 2. Three Login Methods

#### AD (Active Directory) Login

**Application scenario:** Internal employee use, integrating with existing AD system

**Features:** Single Sign-On (SSO), no additional account management needed

**Setup method:** Configure AD server connection information and synchronization rules

**Practical application:** Employees log in directly with company accounts and automatically obtain corresponding permissions

#### Keycloak Login

**Application scenario:** Enterprises requiring complex identity management, supporting multiple identity providers

**Features:** Supports OAuth2, SAML, OpenID Connect and other standard protocols

**Setup method:** Configure Keycloak server, user pool, and identity providers

**Practical application:** Integrates user identities from multiple systems, unified permission management

#### MaiAgent Login

**Application scenario:** Simple user management needs, rapid deployment

**Features:** Built-in user management system, simple and intuitive operation

**Setup method:** Create user accounts and permissions in the MaiAgent platform

**Practical application:** Create dedicated login system for specific user groups

After enabling, the following screen will appear requesting login before starting a conversation:



The image shows a login interface for 'MAI AGENT'. At the top is the company logo, which consists of a stylized 'M' icon followed by the word 'MAI AGENT' in a sans-serif font. Below the logo is a large blue rectangular button with the word '登入' (Login) in white. Above this button, there is a link '忘記密碼?' (Forgot Password?). To the right of the '登入' button is a small circular icon with a question mark. The background of the form is white, and the overall design is clean and modern.

MAI AGENT

登入

請登入以繼續使用 預設助理樣式

電子郵件  
請輸入您的電子郵件

密碼  
請輸入密碼

忘記密碼?

登入

還沒有帳號? 立即註冊

# Integrate Chat Platform: Website

## 1. Access Settings Page

### 1. Path 1: Add Website Customer Service Conversation

Click on the left menu "Customer Service Conversation > Conversation Platform", click the "+ Integrate Conversation Platform" button in the upper right corner, and select the platform "Website"

The screenshot shows the AI Agent software interface. On the left, there is a sidebar with categories: AI 功能, 工具, 客服對話, 所有對話, 對話平台 (which is selected and highlighted in blue), and 內部問答, 組織設定. The main area has a title bar '客服對話 / 對話平台 / 對話平台'. Below the title bar are search and filter buttons: '請輸入對話平台名稱、ID 或類...', '全部頻道...', '全部AI助理...', and '重置篩選'. To the right of these buttons is a red-bordered '串接對話平台' (Integrate Conversation Platform) button. The main content area is a table with columns: ID, 名稱, 頻道, 自動回覆時段, and 操作. There are four rows of data:

ID	名稱	頻道	自動回覆時段	操作
c0699671-7af5-4e5e-9abe-6d9b76955021	123	FB	24小時回覆	
b7c6910f-b4fc-4bd2-9b26-dec37e0e6c37	leena	API	24小時回覆	
94fd49a3-4063-4229-b59e-193a3ca5e837	leena	內部	24小時回覆	
46cb9c16-f2c4-44b8-8932-ceaac551b23d	leena	網頁	24小時回覆	

At the bottom right of the main area, there are buttons for '共 4 筆資料' (4 results), '10 筆/頁' (10 items/page), and a message icon.

The screenshot shows the AI Agent software interface. On the left, there is a sidebar with categories: AI 功能, 工具, 客服對話, 所有對話, 對話平台 (selected), and 內部問答, 組織設定. The main area has a title bar '客服對話 / 對話平台 / 串接對話平台'. Below the title bar is a step-by-step guide: 1. 選擇平台 (Select Platform). 2. 串接對話平台 (Connect Conversation Platform). 3. 完成 (Finish). Step 2 is expanded, showing a '選擇平台' (Select Platform) section with icons for Website (highlighted with a red box), LINE, Messenger, and Telegram.

## 2. Path 2: AI Assistant Associated Conversation Platform

Access the left menu "AI Features > AI Assistant", select an AI Assistant, click the "Actions" icon, then click "Associated Conversation Platform" for "Web XX Assistant"

This screenshot shows the 'AI 助理' (AI Assistant) list page. On the left, there's a sidebar with 'AI 功能' (AI Functions) expanded, showing 'AI 助理' selected. The main area displays a table with one row of data:

ID	AI 助理名稱	LLM 模型	回答模式	更新時間	操作
572acf46-92e9-4a89-b87f-6beae7f86...	小袁	Claude 3.7 Sonnet	一般(預設)	2025-06-25 16:31:48	

At the bottom right of the table, there are buttons for '共 1 筆資料' (1 record), '10 筆/頁' (10 records/page), and a message icon.

This screenshot shows the 'AI 助理 / 設定' (AI Assistant / Settings) page. The left sidebar has 'AI 功能' expanded, with 'AI 助理' selected. The main area has '基本' (Basic) selected in the top navigation bar. Under '基本設定' (Basic Settings), there's a section for 'AI 助理名稱' (AI Assistant Name) with the value 'leena'. Below this, under '類別對話平台' (Conversation Platform Category), there's a list of platforms: '網頁' (Webpage), 'API' (API), and 'FB' (Facebook). A red box highlights the settings icon (gear) next to the '網頁' (Webpage) entry.

Click the settings button

## 3. Path 3: Conversation Platform Actions

In the left menu "**Customer Service Conversation > Conversation Platform**", select the AI Assistant you want to configure, click the "**Actions**" icon to enter the conversation platform configuration.

The screenshot shows the AI Assistant Management interface. On the left, there is a sidebar with categories like AI 功能, 工具, and 客服對話, with '對話平台' selected and highlighted with a red border. The main area displays a table of conversation platforms with columns for ID, 名稱 (Name), 頻道 (Channel), 自動回覆時段 (Automatic Response Time), and 操作 (Operations). There are four entries in the table:

ID	名稱	頻道	自動回覆時段	操作
c0699671-7af5-4e5e-9abe-6d9b76955021	123	FB	24小時回覆	
b7c6910f-b4fc-4bd2-9b26-dec37e0e6c37	leena	API	24小時回覆	
94fd49a3-4063-4229-b59e-193a3ca5e837	leena	內部	24小時回覆	
46cb9c16-f2c4-44b8-8932-ceaac551b23d	leena	網頁	24小時回覆	

At the bottom right of the main area, there are buttons for '共 4 筆資料' (4 results), '10 條/頁' (10 items/page), and a message icon.

## 2. Basic Settings

### 1. Basic Settings

#### Set Platform Name

Enter the AI Assistant name you want to display on the website in the "**Platform Name**" field  
For example: "Customer Service Helper", "Smart Assistant", etc.



Platform name display

## Select AI Assistant

Select the AI Assistant you want to use from the "**AI Assistant**" dropdown menu

This determines which AI Assistant the chatroom will use to answer questions

## Set Return URL

Enter your company website URL in the "**Return URL**" field

When users click the return button in the chatroom, they will be redirected to this URL

## Obtain and Use Public URL

The system will automatically generate a "**Public Access URL**"

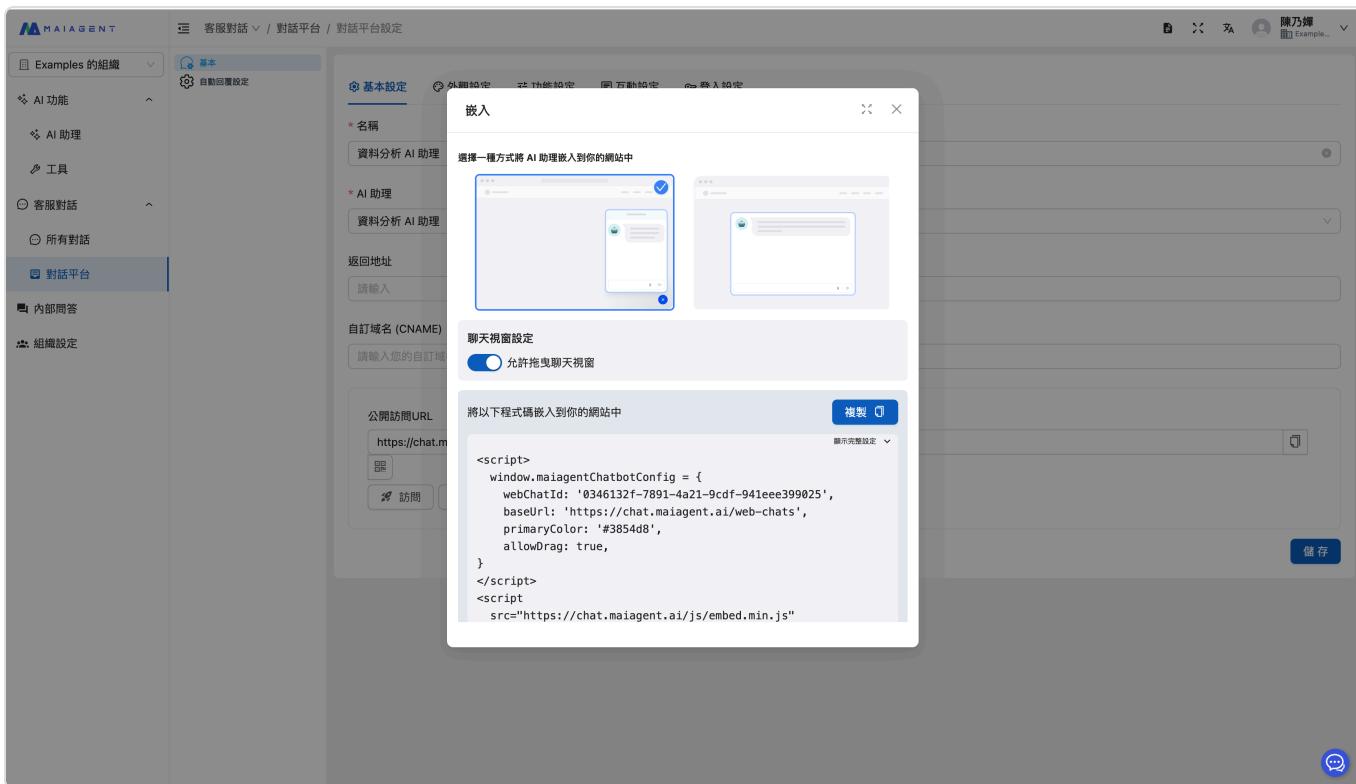
You can:

Click the "**Copy**" button to copy the URL

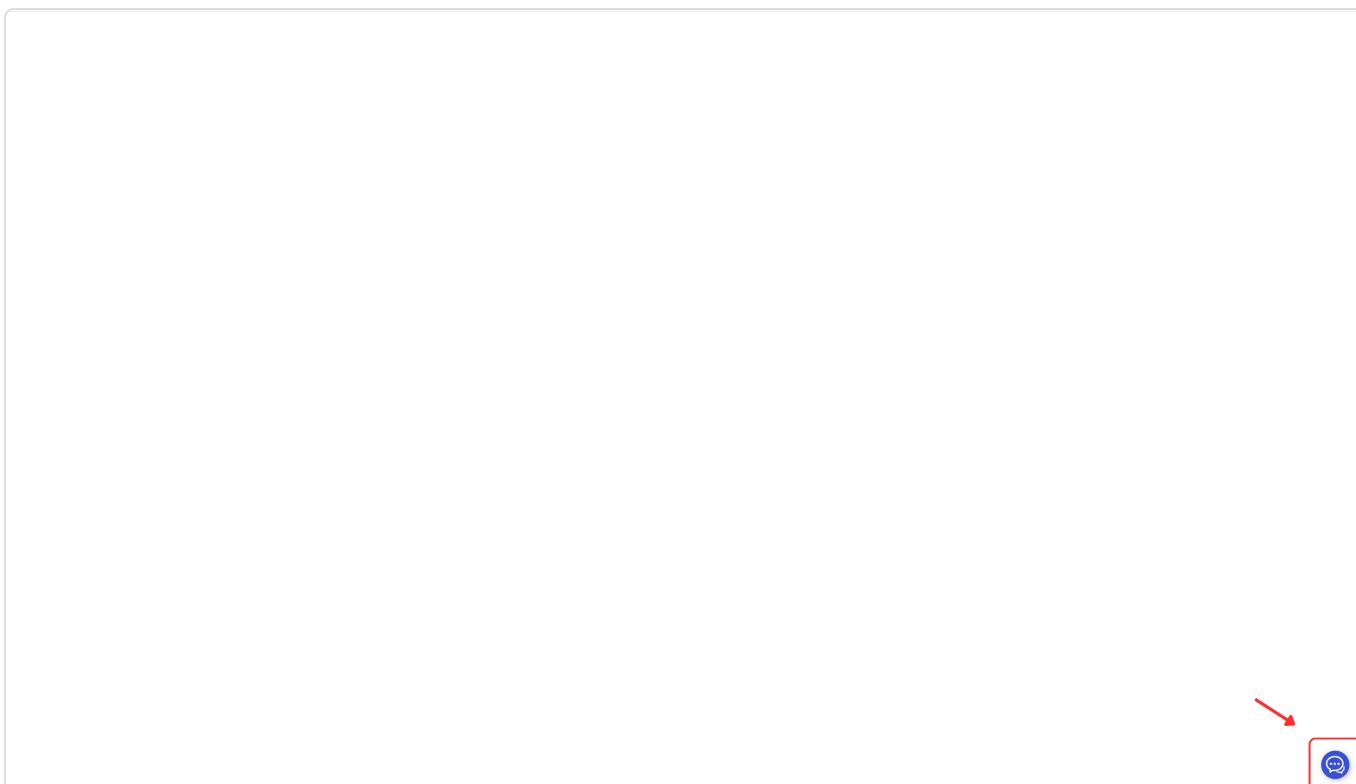
Click the "**Visit**" button to open the chatroom in a new window

Click the "**Embed**" button to get the embed code

Click the "**Embed Preview**" button to preview the embed effect



Embed method selection



Preview embed

After adding the return URL, it will display in the background when returning to the previous page

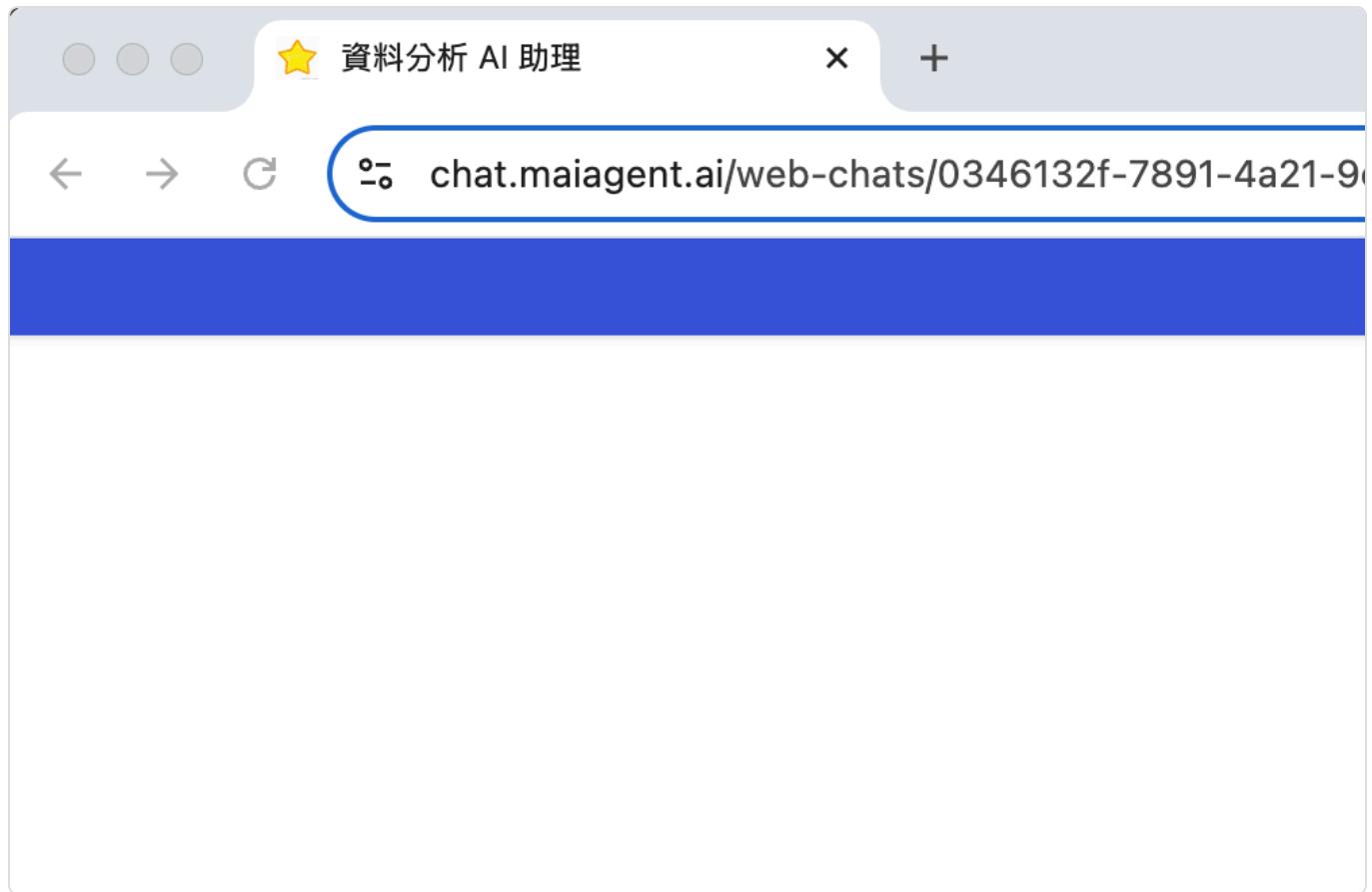
## 2. Appearance Settings

### Upload Company Logo

Click the upload button in the "Logo" area

Select your company logo image file

After uploading, a preview will be displayed, and you can click delete to re-upload



Logo setting display

### Upload AI Assistant Avatar

Click the upload button in the "Avatar" area

Select an appropriate avatar image

After uploading, a preview will be displayed, and you can click delete to re-upload

### Set Color Theme

Click the "Theme Color" picker to select the color of the chatroom window title

Click the "Title Font Color" picker to set the title text color

Click the "[AI Assistant Response Background Color](#)" picker to set the background color of AI reply messages

### Enable Theme Switching

Toggle the "[Theme Mode Switch](#)" to the on position

Users can switch between light and dark themes

---

Avatar, color theme, dark theme example

## 3. Function Settings

### Set Enable/Disable

Configure whether the conversation is enabled for service

---

Turn off enable switch

### Set File Upload

Toggle the "[Allow File Upload](#)" switch to the on position

Users can then upload files for AI analysis, such as images, documents, etc.

---

Enable allow file upload

### Set Citation Document Display

Toggle the "[Show Citation Documents](#)" switch to the on position

When the AI answers, it will display reference source documents

### Set Allow Citation Document Download

Toggle the "[Allow Citation Document Download](#)" switch to the on position

Users can download the document content cited by the AI Assistant in the conversation



Enable Show Citation Documents and Allow Citation Document Download

## Set Show Tools Used and Results

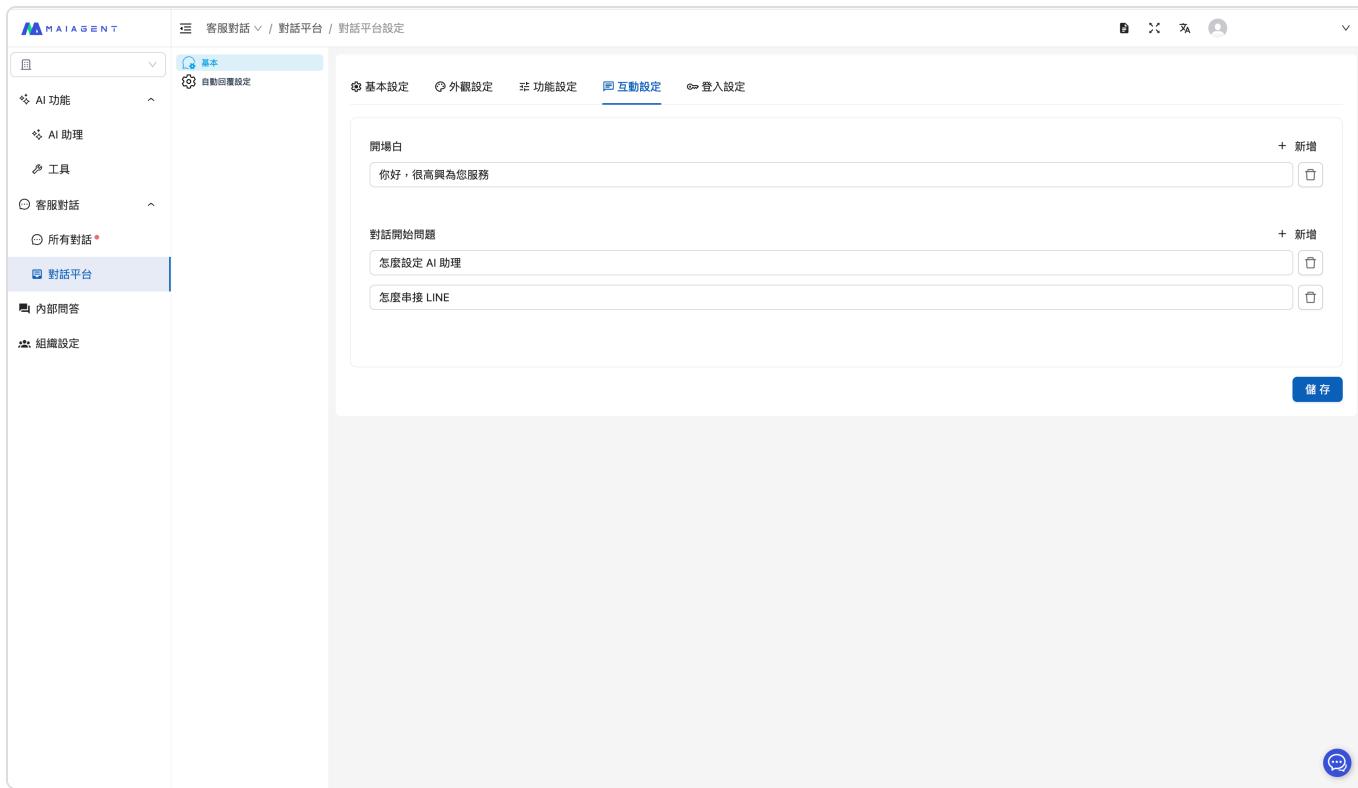
Toggle the "Show Tools Used and Results" switch to the on position

The system will indicate that processing is ongoing through MCP or API operations



Show tools used and results

## 4. Interaction Settings



### Set Opening Message

Enter a welcome message in the opening message input box

For example: "Hello! I'm your intelligent customer service, how can I help you?"

Click the "Add" button to add the opening message to the list

You can add multiple opening messages, and the system will randomly select one

To delete, click the delete button on the right side of the corresponding item

### Set Conversation Starter Questions

Enter default questions in the "Conversation Starter Questions" input box

For example: "How do I apply for a return?", "What are the business hours?"

Click the "Add" button to add the question to the list

These questions will be displayed as quick options for users to click

To delete, click the delete button on the right side of the corresponding item



Opening message and conversation starter questions

## 5. Login Settings

### Set SSO Login Source

MaiAgent currently supports SSO (Single Sign-On) service through Keycloak integration

Switch in the "[Login Source](#)" dropdown menu

Choose to use Maiagent or Keycloak as the authentication method

A screenshot of the 'Login Settings' configuration page. It features a '登入方式' (Login Method) section with a toggle switch labeled '啟用登入功能' (Enable login function) which is turned on. Below this is a '登入來源' (Login Source) section with a dropdown menu labeled '請選擇' (Select). Two options are listed: 'MaiAgent' and 'Keycloak'. The 'Keycloak' option is highlighted with a blue border.

## 3. Auto-Reply Settings

You can set the bot's reply time periods here.

Click the switch button next to the date: Select which days of the week to reply.

Set time period: Select the start time and end time.

Add time period: If you have multiple time periods to set, press "**+ Add Time Period**" to add and configure time periods.

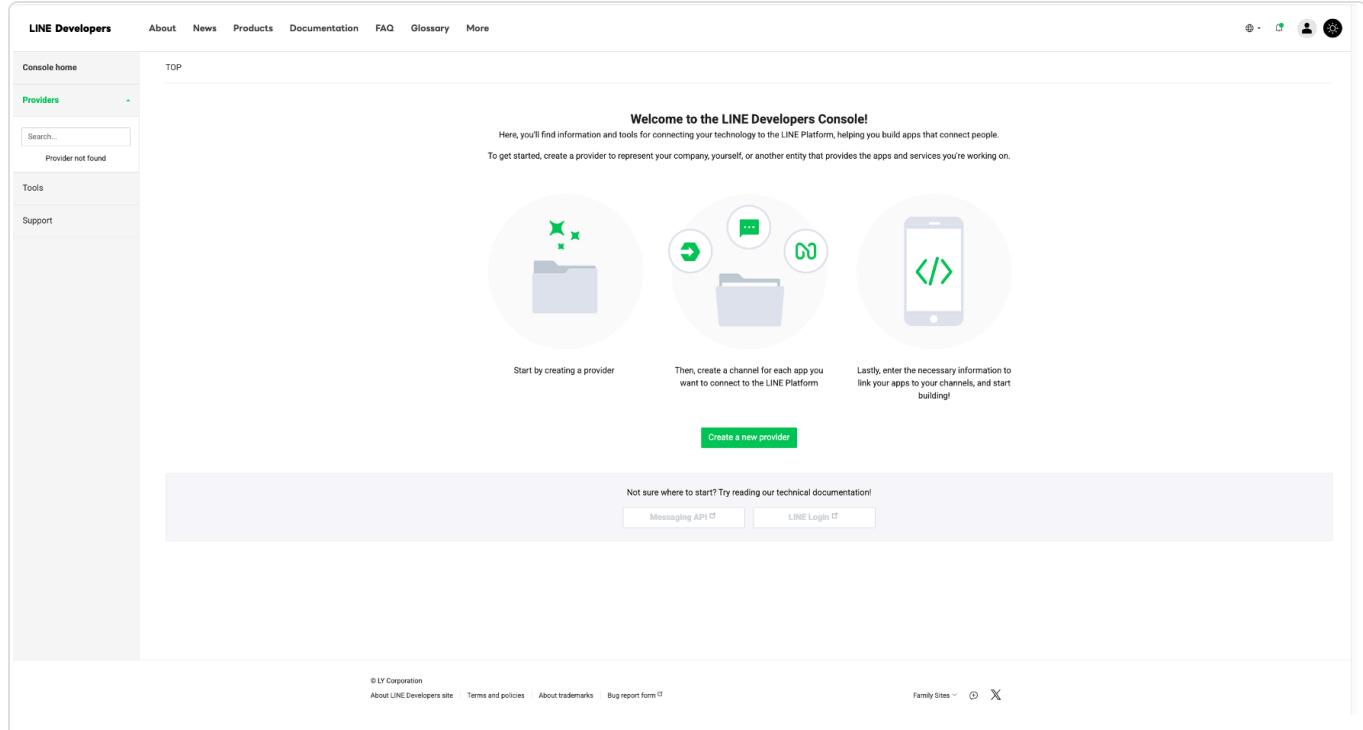
The screenshot shows the MaiAgent platform interface. On the left, there's a sidebar with various sections: AI功能, AI助理, 工具, 客服對話, 所有對話, 对话平台 (which is selected and highlighted in blue), 内部問答, and 組織設定. The main content area is titled '客服對話' and shows '對話平台設定'. It has a section for '自動回覆設定' (Automatic Reply Settings) with a '基本' (Basic) tab selected. Below this, there are seven rows, one for each day of the week (周一 to 周日), each with a switch, a time range from 00:00 to 00:00, and a small circular icon. To the right of each row is a '+ 新增时段' (Add New Time Segment) button. At the bottom right of the main content area is a blue '更新' (Update) button. In the top right corner of the main window, there's a user profile icon and the text 'MaiAgent 客服'.

# Integrate Chat Platform: LINE

## Pre-Connection Checklist

You have already created an "AI Assistant" on the [MaiAgent Platform](#)

You have already created a "Provider" and a LINE Official Account on the [LINE Developers](#) console platform



## Start Connection

1. Go to <https://manager.line.biz/> and select the Official Account you want to connect

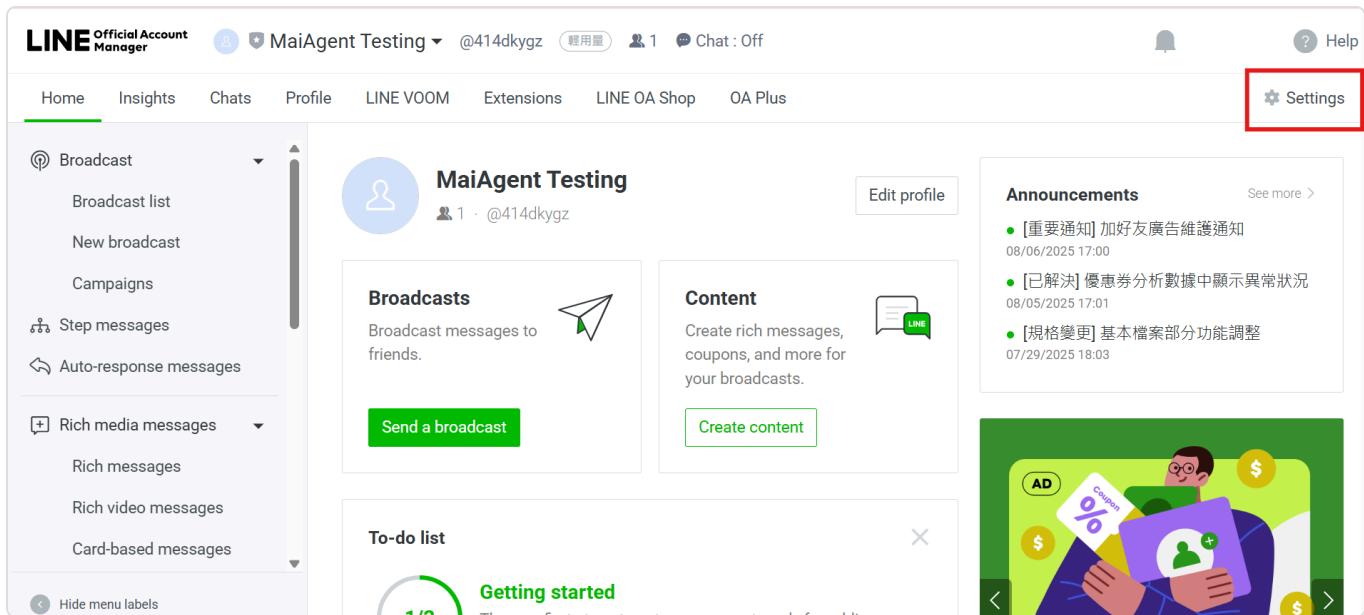
Click on MaiAgent Testing:

The screenshot shows the 'Account List' section of the LINE Official Account Manager. On the left, there's a sidebar with 'Account' and 'Groups' tabs, and a 'Create' button. The main area has a title 'Account List' and a search bar. Below is a table with one row, showing the account 'MaiAgent Testing' with details: 1 friend, Admin rights, and Light usage. Navigation arrows are at the bottom.

After clicking, you will enter the Official Account settings screen:

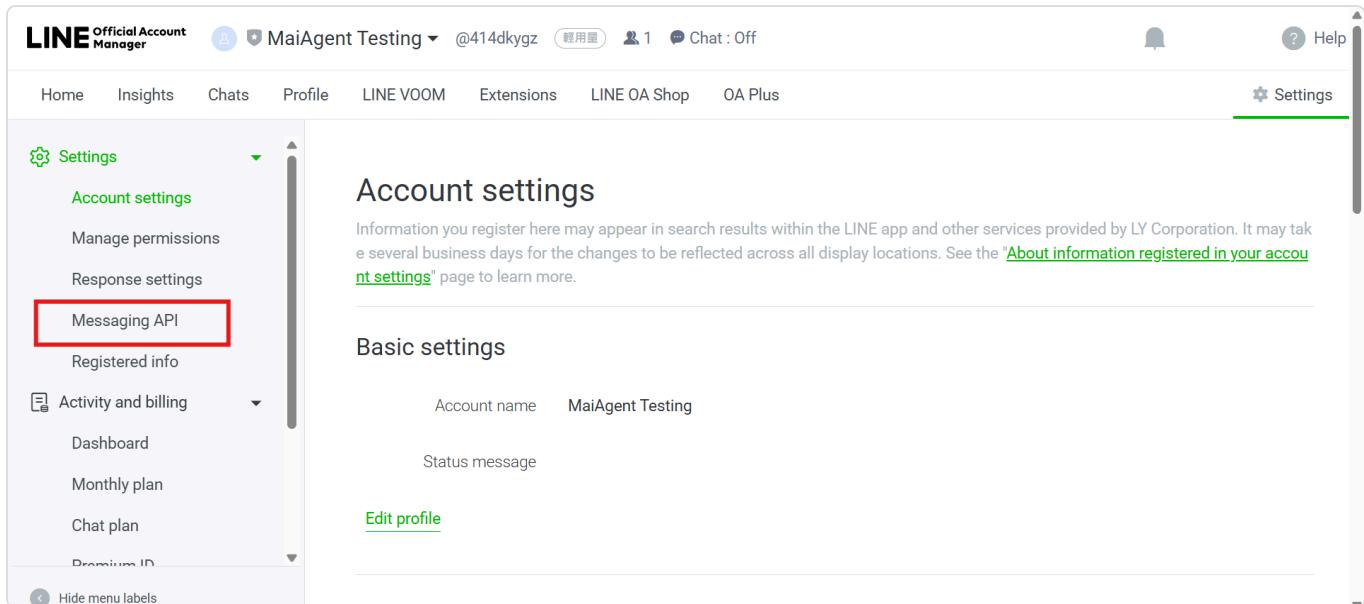
The screenshot shows the 'Settings' screen for the account 'MaiAgent Testing'. The top navigation bar includes account info (@414dkygz), a bell icon, and a help link. The main menu has tabs for Home, Insights, Chats, Profile, LINE VOOM, Extensions, LINE OA Shop, and OA Plus. The 'Broadcast' section is active, showing options like Broadcast list, New broadcast, Campaigns, Step messages, Auto-response messages, Rich media messages (Rich messages, Rich video messages, Card-based messages), and a 'Getting started' guide. To the right, there's an 'Announcements' section with a list of recent updates and a cartoon illustration of a person using a laptop with various icons.

## 2. Click on Settings in the upper right corner



The screenshot shows the LINE Official Account Manager interface. At the top, it displays the account name "MaiAgent Testing" and some usage statistics. The navigation bar includes links for Home, Insights, Chats, Profile, LINE VOOM, Extensions, LINE OA Shop, and OA Plus. A red box highlights the "Settings" button in the top right corner. On the left, a sidebar menu lists various features like Broadcast, Campaigns, Step messages, and Rich media messages. The main content area shows a summary of broadcasts, content creation, and a to-do list. An "Announcements" section on the right lists recent updates.

Then enter the following screen and click on the Messaging API list on the left:



The screenshot shows the "Account settings" page under the "Settings" section. The left sidebar has a red box around the "Messaging API" option. The main content area displays basic account information such as account name ("MaiAgent Testing") and status message, with a link to "Edit profile".

### 3. Enable Messaging API Service

a. After entering, click **Enable Messaging API**

The screenshot shows the LINE Official Account Manager interface. At the top, there's a header with the account name "MaiAgent Testing" and some status indicators. Below the header is a navigation bar with links like Home, Insights, Chats, Profile, LINE VOOM, Extensions, LINE OA Shop, OA Plus, and Settings. The Settings link is highlighted with a green underline. On the left, there's a sidebar with a "Settings" section expanded, showing options like Account settings, Manage permissions, Response settings, and Messaging API (which is also underlined in green). Below that is an "Activity and billing" section with Dashboard, Monthly plan, and Chat plan. At the bottom of the sidebar is a "Premium ID" section and a "Hide menu labels" link. The main content area is titled "Messaging API". It contains a brief description: "Messaging API is an advanced feature for developers. It allows accounts to promote more interactive communication by sending and receiving messages and actions via the API." Below the description are two links: "What is Messaging API?" and "LINE Developers API documentation". Underneath this is a status indicator showing "Status" and "Disabled". To the right of the status is a large green button labeled "Enable Messaging API".

b. Select the Provider you just created (if you haven't created one yet, you can still create a Provider on this page)

After making your selection, click **Agree**

## Select provider

X

Please select the company or person who operates this account.

A provider is an individual developer, company, or organization that manages users' personal information to offer various services.

More details at [LINE Developers](#).

New provider

Enter provider name

0/100

chen

MaiAgent

By tapping Agree below, you agree to the [Messaging API Terms and Conditions of Service](#).

Cancel

Agree

nd policies

c. Submit privacy policy and other documents (optional)

In the next step, you can enter the URL of your company's internal privacy policy and other documents. After completion, click "ok" to proceed to the final confirmation.

## Privacy Policy and Terms of Use

Please enter the Privacy Policy and Terms of Use for the provider. You can edit this info later.

### Privacy Policy

0/500

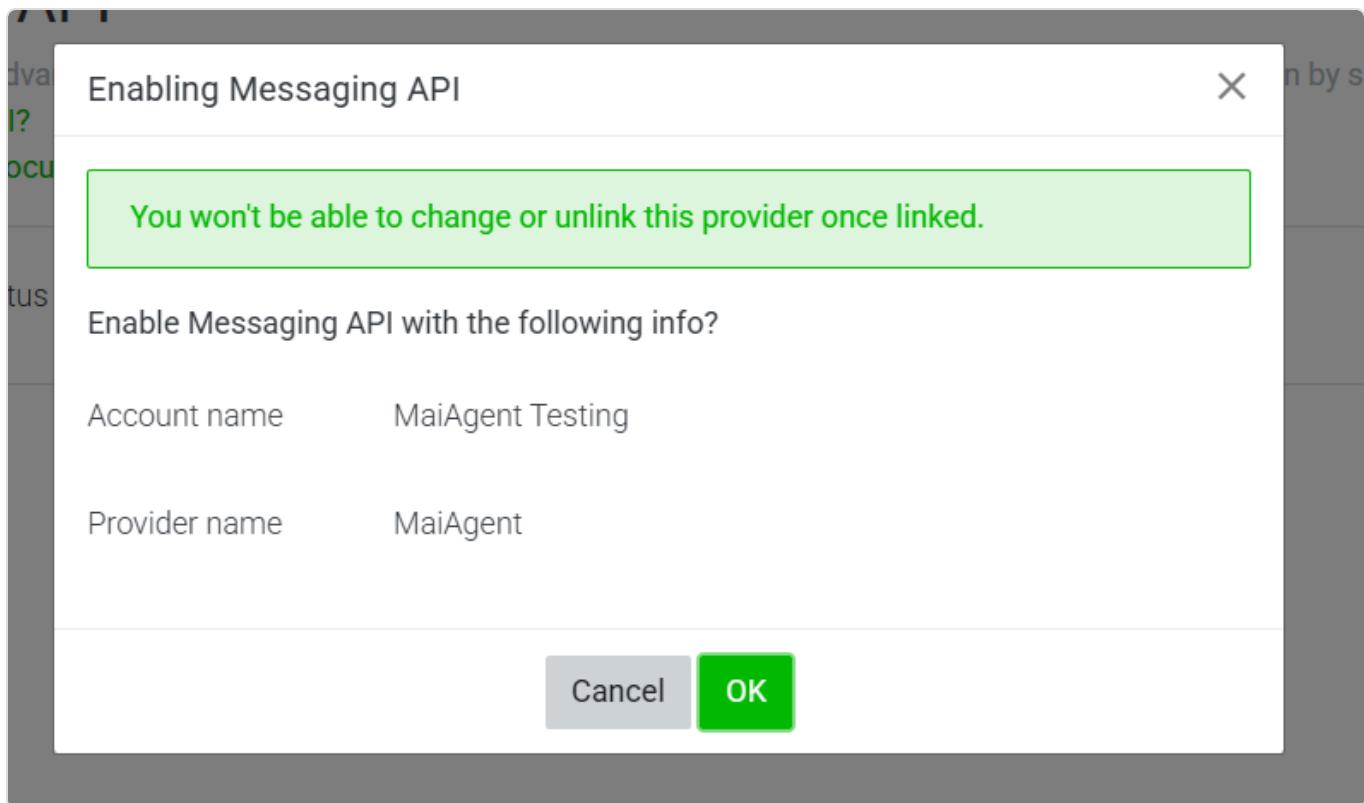
This link is optional.

### Terms of Use

0/500

This link is optional.

Before clicking ok, please confirm again that the Provider you are connecting to is correct. Once you click ok, it cannot be undone



#### 4. Obtain **Channel ID**, **Channel Secret**, **Channel Access Token**

a. After clicking OK, you can obtain the **Channel ID** and **Channel secret** for the Messaging API service:

Messaging API

Messaging API is an advanced feature for developers. It allows accounts to promote more interactive communication by sending and receiving messages and actions via the API.

[What is Messaging API?](#)

[LINE Developers API documentation](#)

Status	Enabled
Channel info	Channel ID Channel secret
Webhook URL	<input type="text" value="https://"/> <input type="button" value="Save"/>

You can find more related settings in the [LINE Developers Console](#).

b. Return to the [LINE Developers](#) page to obtain the Channel Access Token

Enter the MaiAgent Provider you just created

Console home

**Providers**

Search...

Admin  
chen  
MaiAgent

Tools

Support

<https://developers.line.biz/console/>

TOP

**Providers (2)** **Create**

Search...

Provider	Role
chen	Admin
MaiAgent	Admin

c. Find the MaiAgent Testing Channel you just created and click to enter

Console home

**Providers**

Search...

Admin  
chen  
**MaiAgent**

Tools

Support

TOP > MaiAgent

**MaiAgent**

Channels Roles Settings

Group by role

<a href="#">Create a new channel</a>	 <b>MaiAgent Testing</b> <small>New Admin</small> <small>Messaging API</small>
--------------------------------------	---

d. Switch to the Messaging API page and scroll down to the Channel access token section

Console home

**Providers**

Search...

Admin  
chen  
MaiAgent

Tools

Support

TOP > MaiAgent > MaiAgent Testing > **Messaging API**

 **MaiAgent Testing** Admin | Messaging API

Basic settings **Messaging API** LIFF Security Statistics Roles

**Messaging API settings**

**Bot information**

Bot basic ID

QR code

e. Issue and copy the **Channel access token**

If you haven't issued a **Channel access token** yet, please click **Issue**:

The screenshot shows the 'Messaging API' settings page. At the top, there's a breadcrumb navigation: TOP > MaiAgent > MaiAgent Testing > **Messaging API**. Below this, there are two sections: 'Auto-reply messages' (Enabled) and 'Greeting messages' (Enabled). Under the 'Channel access token' heading, there is a button labeled 'Issue'.

Then you can obtain and copy your **Channel access token**:

The screenshot shows the LINE Developers console. The top navigation bar includes links for LINE Developers, About, News, Products, Documentation, FAQ, Glossary, More, and user profile icons. The left sidebar has a 'Console home' link. The main content area shows the 'Messaging API' settings. It includes sections for 'Webhook URL' (with an 'Edit' button), 'LINE Official Account features' (with an 'Edit' button), 'Allow bot to join group chats' (Disabled), 'Auto-reply messages' (Enabled), 'Greeting messages' (Enabled), and the 'Channel access token' section. The 'Channel access token' section contains a 'Channel access token (long-lived)' field with a placeholder value, a 'Reissue' button, and a 'Copy' icon.

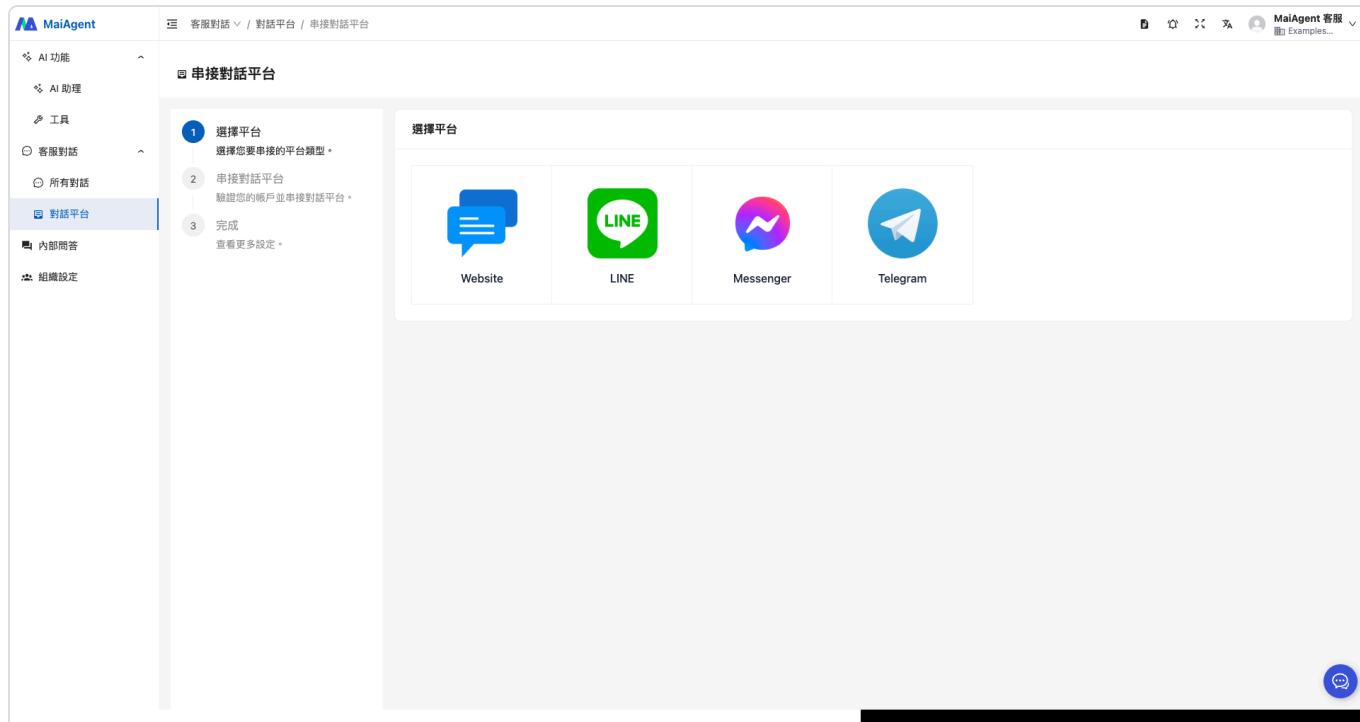
## 5. Go to your MaiAgent chat platform and select LINE

a. Click on **Connect Chat Platform** in the upper right corner



The screenshot shows the MaiAgent platform's interface. On the left, there is a sidebar with various menu items like AI功能, AI助理, 知識庫, 工具, 客服對話, 所有對話, 對話平台, 聯絡人, 內部問答, 組織設定. The '對話平台' item is currently selected and highlighted in blue. In the main content area, there is a table listing different conversation platforms. At the top right of the table, there is a blue button labeled '+ 串接對話平台'. Below the table, there are pagination controls (共 45 條資料 1 2 3 4 5 > 10 條/頁 跳至) and a search bar.

b. Select LINE as the connection platform



The screenshot shows the 'Select Platform' step in the MaiAgent platform. The left sidebar shows the '對話平台' section is selected. The main area has a title '串接對話平台' and a sub-section '選擇平台'. It displays three steps: 1. 選擇平台 (Select Platform), which says '選擇您要串接的平台類型。'; 2. 串接對話平台 (Connect Conversation Platform), which says '驗證您的帳戶並串接對話平台。'; 3. 完成 (Finish), which says '查看更多設定。'. Below these steps, there is a '選擇平台' button. To the right, there is a '選擇平台' section with four icons: Website (blue speech bubble icon), LINE (green speech bubble icon with 'LINE' text), Messenger (purple speech bubble icon with a person icon), and Telegram (blue speech bubble icon with a telegram icon). A blue 'LINE' icon is highlighted, indicating it is selected.

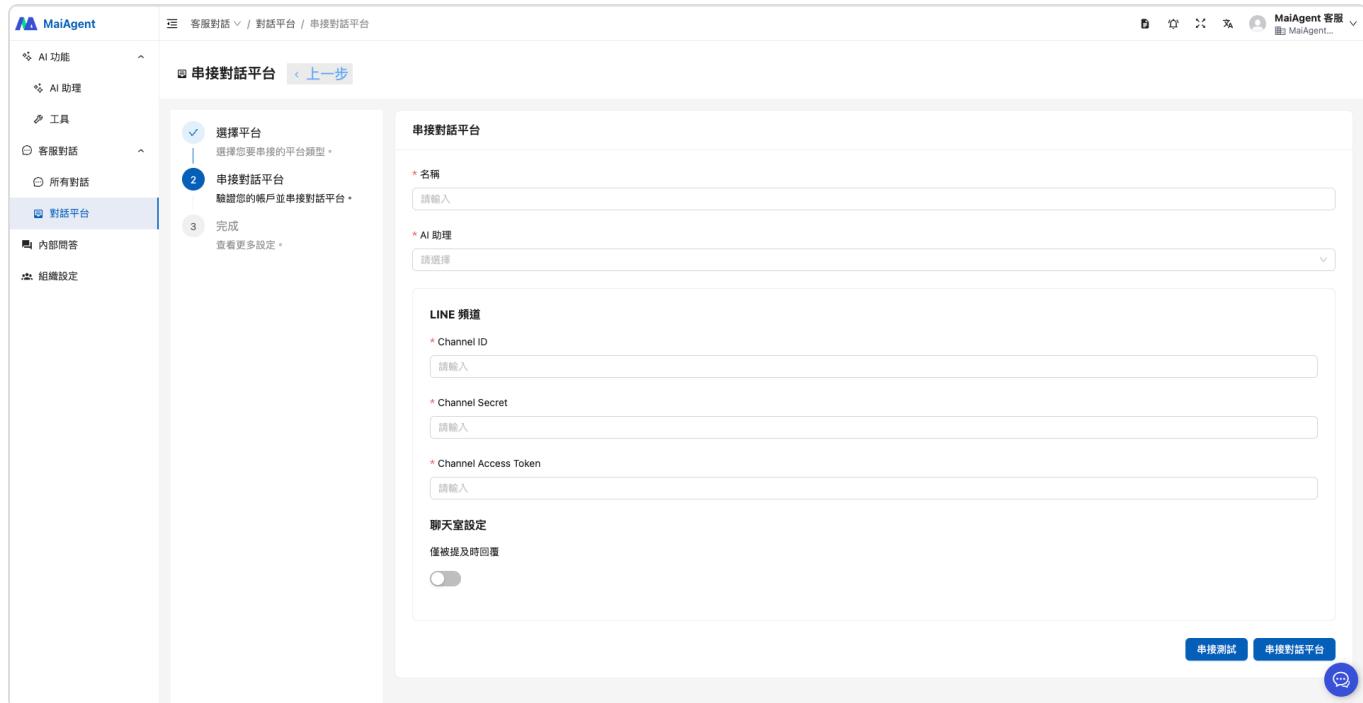
## 6. Enter the name, select the assistant, and paste the Channel ID, Channel Secret, and Channel Access Token you just obtained

**Name:** The AI assistant name you want to display on the website

**AI Assistant:** Select the AI assistant you want to connect

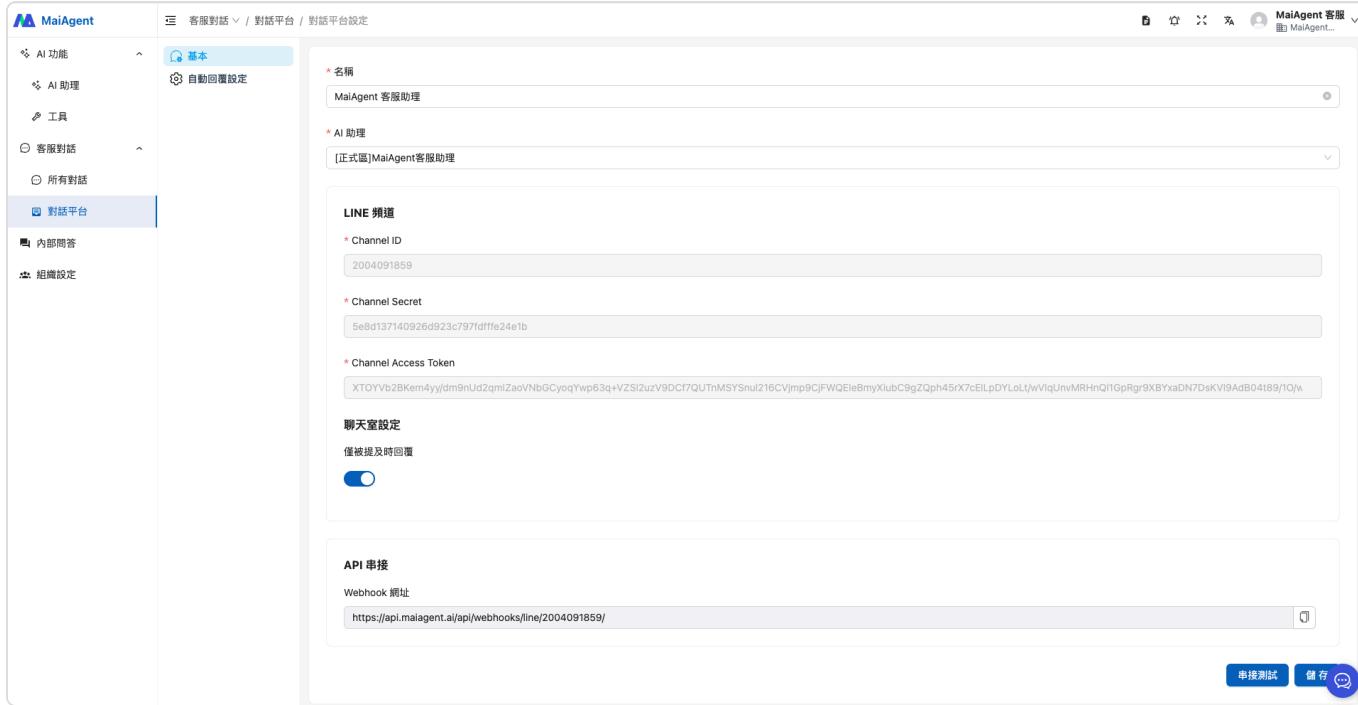
**LINE Channel:** Enter your "Channel ID", "Channel Secret", "Channel Access Token"

After completion, click the "Connect Chat Platform" button in the lower right corner, and the chat platform will be ready.



## 7. Obtain Webhook URL

Go to the chat platform, select the LINE channel you just created, click on operations, and obtain the Webhook URL in the API section



## 8. On <https://manager.line.biz/>, click "Settings/Messaging API" and paste the Webhook URL you just obtained

## 9. Return to the Messaging API channel you just created on <https://developers.line.biz/console/> to configure chat settings

Click the **Edit** button under Auto-reply messages

## Console home

TOP > Yuchen\_Test > MaiAgentLine > **Messaging API**Allow bot to join group chats  Disabled[Edit](#)Auto-reply messages  Enabled[Edit](#)Greeting messages  Enabled[Edit](#)**Channel access token**Channel access token (long-lived) [②](#)Snipaste 2.10.3 免費版 (macOS商店版)  
預覽快照鏈-F1  
點閱快照鏈-F3

AQ+2q+auq/BH9VPaO1K5kCE278k7921xx7XSNRVTMUtCL800aVUE5v2kJly0zlkd080wFlnPP2Iqlt

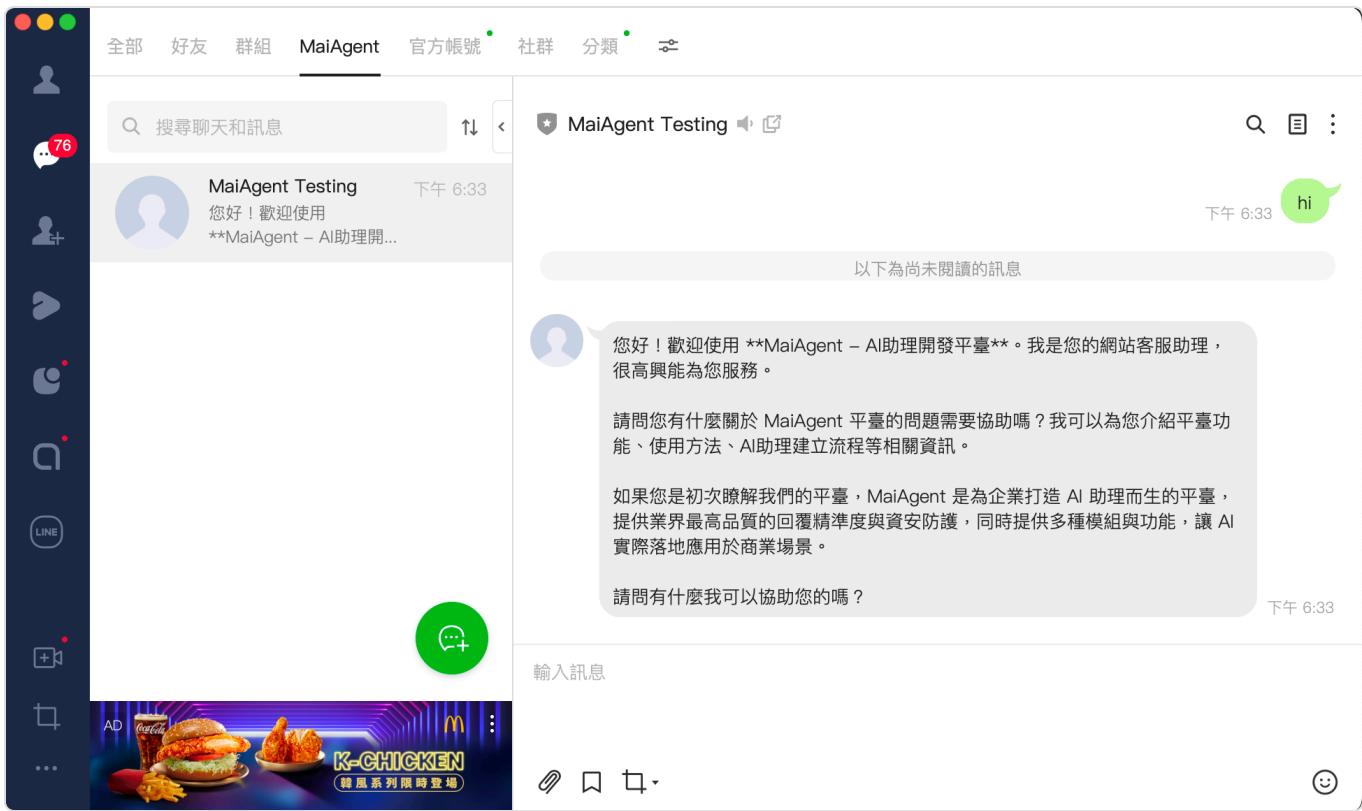
Adjust the response settings as shown below



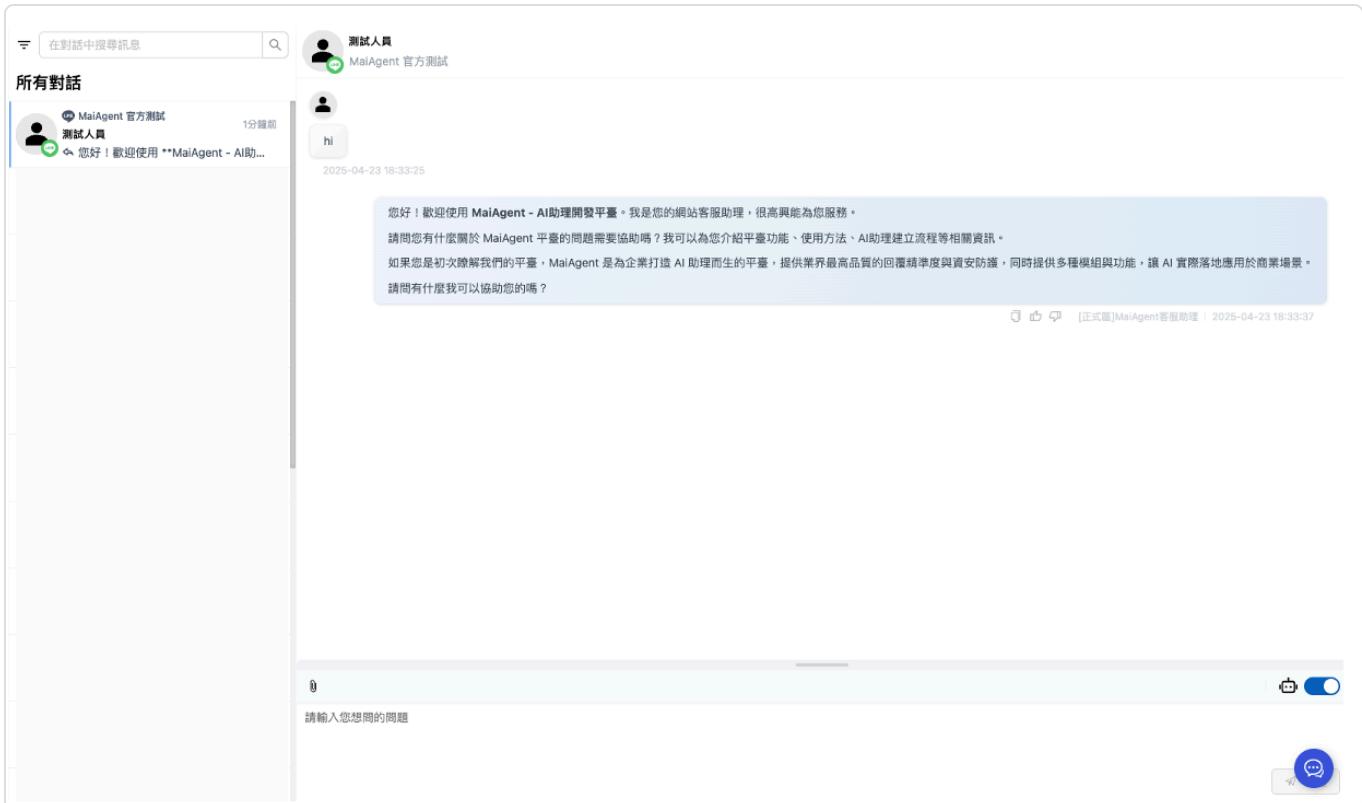
The screenshot shows the LINE Official Account Manager interface for the account 'MaiAgent Testing'. The left sidebar has a '設定' (Settings) section with '回應設定' (Response Settings) selected. The main content area is titled '回應設定' (Response Settings) and describes how to set up responses for the account. It includes sections for '回應功能' (Response Functions) and '聊天的回應方式' (Chat Response Methods). In the '回應功能' section, three switches are shown: '聊天' (Chat), '加入好友的歡迎訊息' (Welcome message for adding friend), and 'Webhook'. In the '聊天的回應方式' section, there are two main categories: '回應時間' (Response Time) and '回應方式' (Response Method). Under '回應時間', there is a switch for '回應時間' and another for '非回應時間' (Non-response time). Under '回應方式', there is a switch for '回應時間' and a radio button for '手動聊天' (Manual Chat). Other options like '手動聊天 + 自動回應訊息' (Manual Chat + Automatic Response Message) are also present.

## 10. Verify successful connection

You can try adding your own LINE AI Assistant account for a conversation



If the related conversations can be viewed on <https://manager.line.biz/> and in all MaiAgent conversations, it means the connection was successful!



## **Important Notes**

---

### **Restrictions**

A LINE group can only add one AI assistant

Newly added AI assistants will cause the previous one to be automatically removed

# Integrate Chat Platform: FB Messenger

## Pre-Integration Checklist

### MaiAgent Preparation

An "AI Assistant" has been created on the [MaiAgent platform](#)

### Facebook Permission Preparation

Facebook account has been invited to or has created a Business Manager

Has "Full Control" permission for that Business Manager

### Fan Page Permission Confirmation

If the fan page is already under Business Manager: No additional adjustments needed

If the fan page is not under Business Manager: Must be an administrator of the fan page with full control permission





**Start Integration**

## 1. Go to MaiAgent's messaging platform page and click "Integrate Messaging Platform"

- Click **Integrate Messaging Platform** in the upper right corner

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請輸入對話平台名稱、ID 或頻道名稱

全部頻道類型 全部 AI 助理 重置篩選 + 串接對話平台

ID	名稱	頻道	AI 助理	自動回覆時段	最後更新時間	操作
691b3585-93ed-4cb4-... <a href="#">編輯</a>	Test	API	Test	24 小時回覆	2025-08-19 06:15:52	<a href="#">檢視</a> <a href="#">編輯</a>
24f11c53-6f7b-4b8c-8f... <a href="#">編輯</a>	Test	內部	Test	24 小時回覆	2025-08-19 06:19:13	<a href="#">檢視</a> <a href="#">編輯</a>
e7d1bcef-c22e-497f-b7... <a href="#">編輯</a>	Test	網頁	Test	24 小時回覆	2025-08-19 06:15:52	<a href="#">檢視</a> <a href="#">編輯</a>
f61dab11-8f86-4611-af... <a href="#">編輯</a>	模型測試	API	模型測試	24 小時回覆	2025-08-17 17:14:45	<a href="#">檢視</a> <a href="#">編輯</a>
7b1e61ab-f6a8-43aa-b... <a href="#">編輯</a>	模型測試	內部	模型測試	24 小時回覆	2025-08-20 10:28:27	<a href="#">檢視</a> <a href="#">編輯</a>
6288c01b-6266-463f-b... <a href="#">編輯</a>	模型測試	網頁	模型測試	24 小時回覆	2025-08-16 10:46:13	<a href="#">檢視</a> <a href="#">編輯</a>
bae8e104-4cd3-4507-a... <a href="#">編輯</a>	自定義助理樣式	網頁	全螢幕嵌入示範	24 小時回覆	2025-08-15 16:24:45	<a href="#">檢視</a> <a href="#">編輯</a>
aa21a8fa-4764-487b-9... <a href="#">編輯</a>	預設助理樣式	網頁	全螢幕嵌入示範	24 小時回覆	2025-08-15 17:39:59	<a href="#">檢視</a> <a href="#">編輯</a>
61b921e8-0212-423c-9... <a href="#">編輯</a>	POC Agent	API	POC Agent	24 小時回覆	2025-08-13 12:51:13	<a href="#">檢視</a> <a href="#">編輯</a>
baa63377-c5fd-44f8-b... <a href="#">編輯</a>	POC Agent	內部	POC Agent	24 小時回覆	2025-08-13 12:51:13	<a href="#">檢視</a> <a href="#">編輯</a>

共 45 條資料 | 1 2 3 4 5 > 10 條/頁 跳至

## b. Select Messenger

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串接對話平台

1 選擇平台  
選擇您要串接的平台類型。

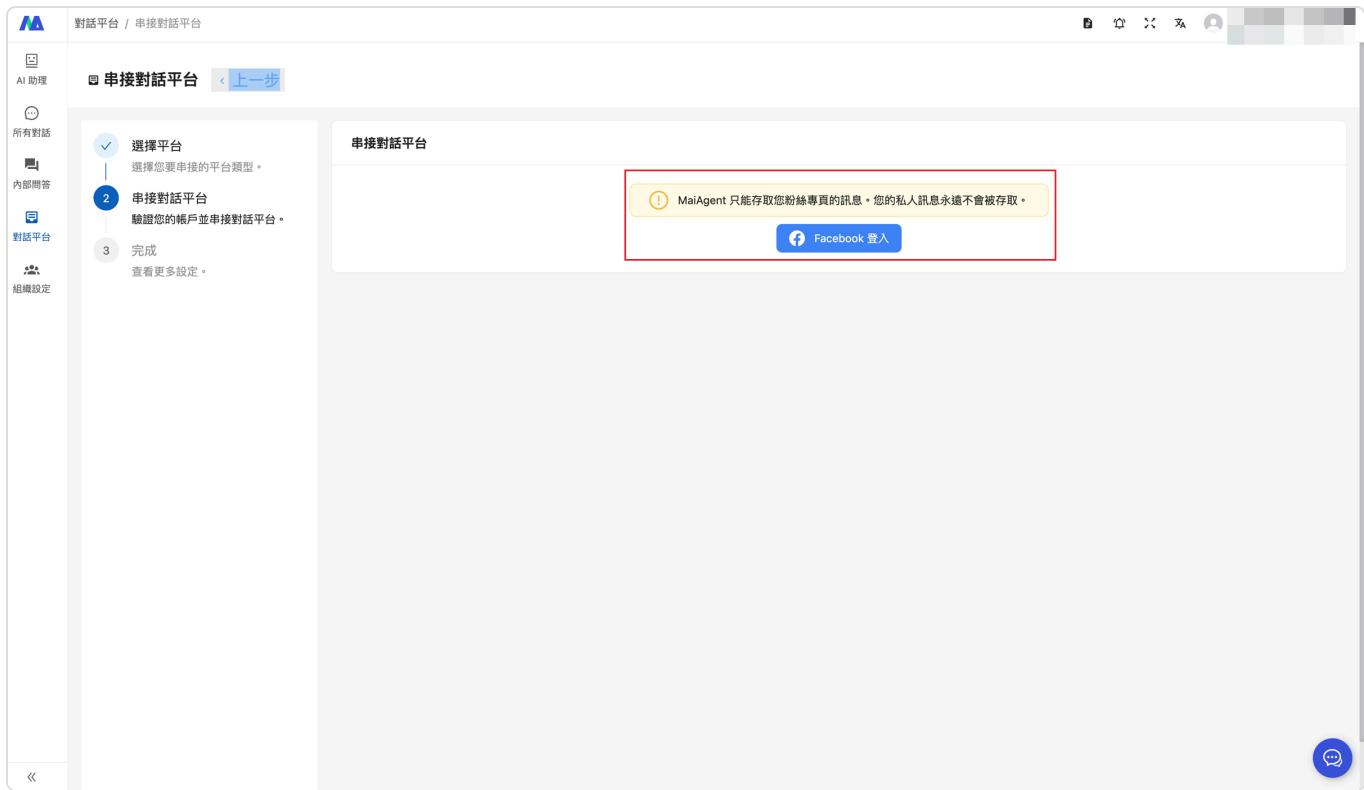
2 串接對話平台  
驗證您的帳戶並串接對話平台。

3 完成  
查看更多設定。

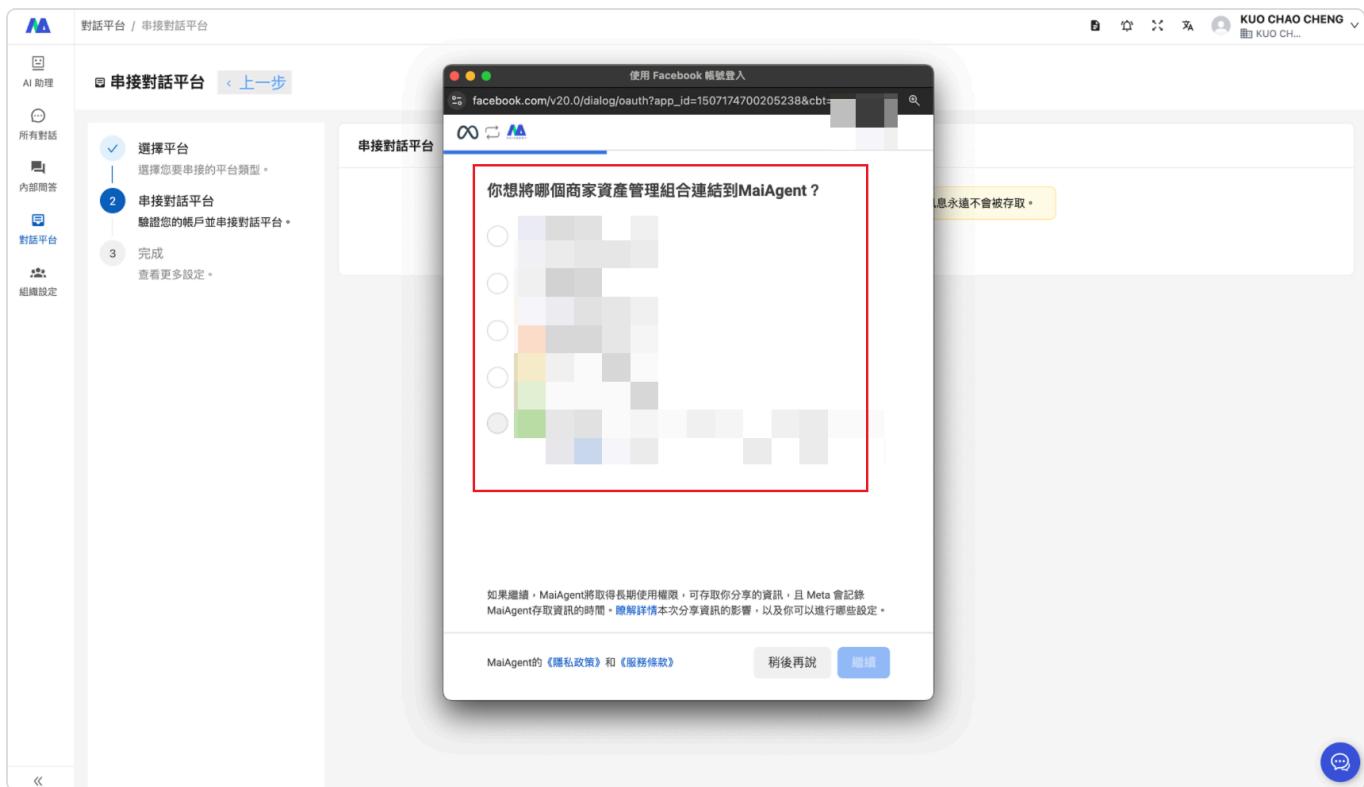
選擇平台

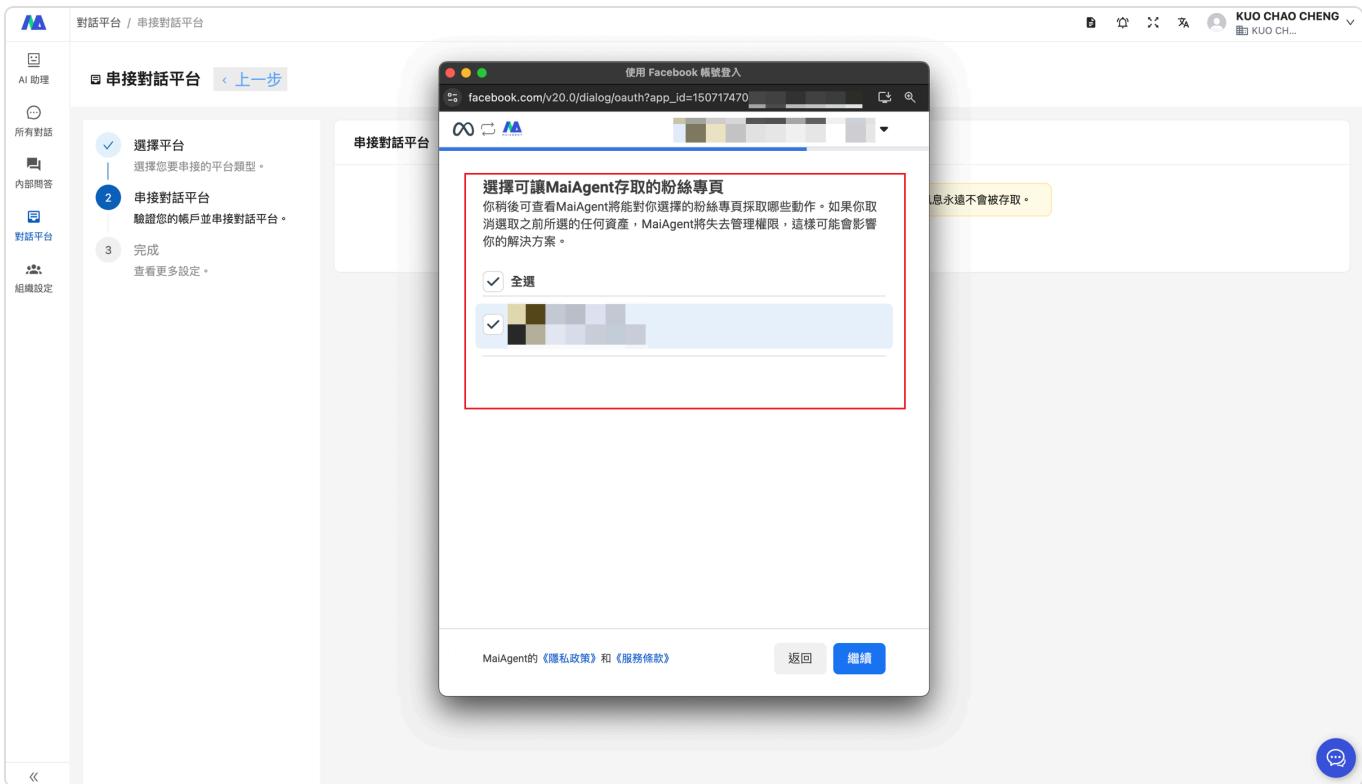
Website	LINE	Messenger	Telegram
---------	------	-----------	----------

## c. Log in with the Facebook account associated with the fan page.

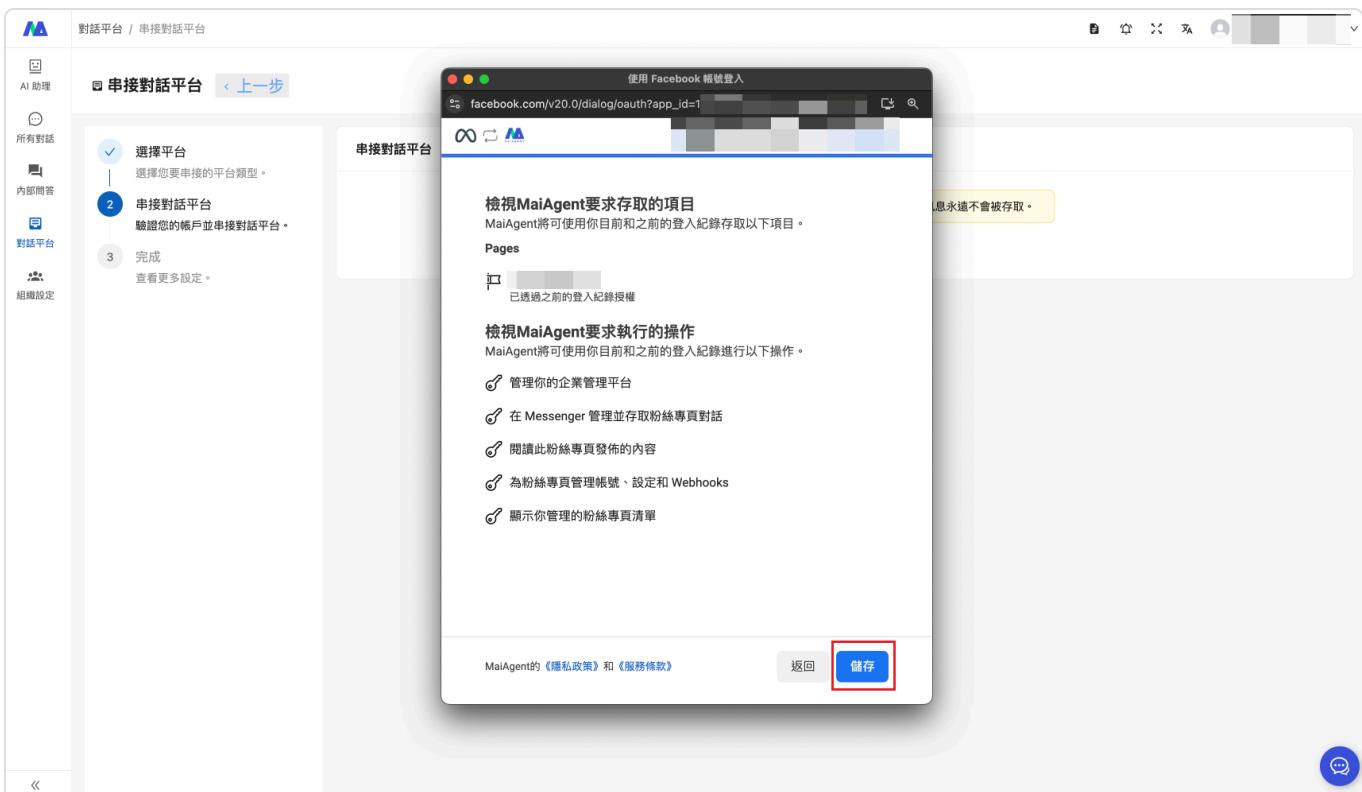


## 2. Select the business and select (claim) the fan page.



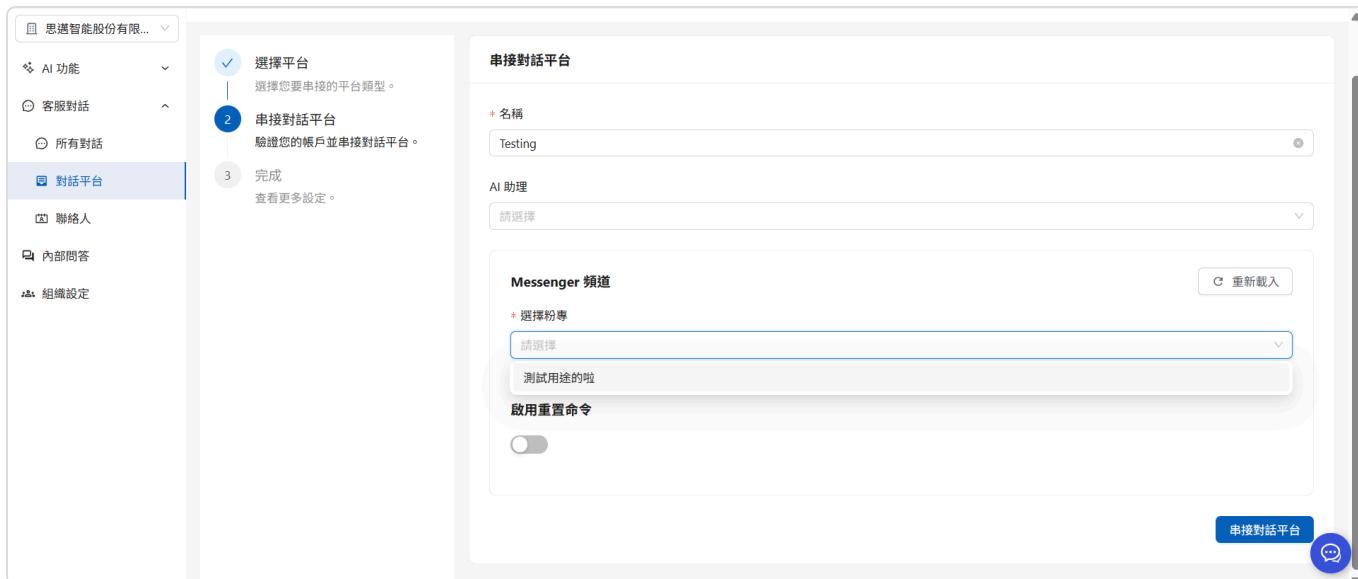


Confirm authorization, and upon successful creation, hosting is complete.



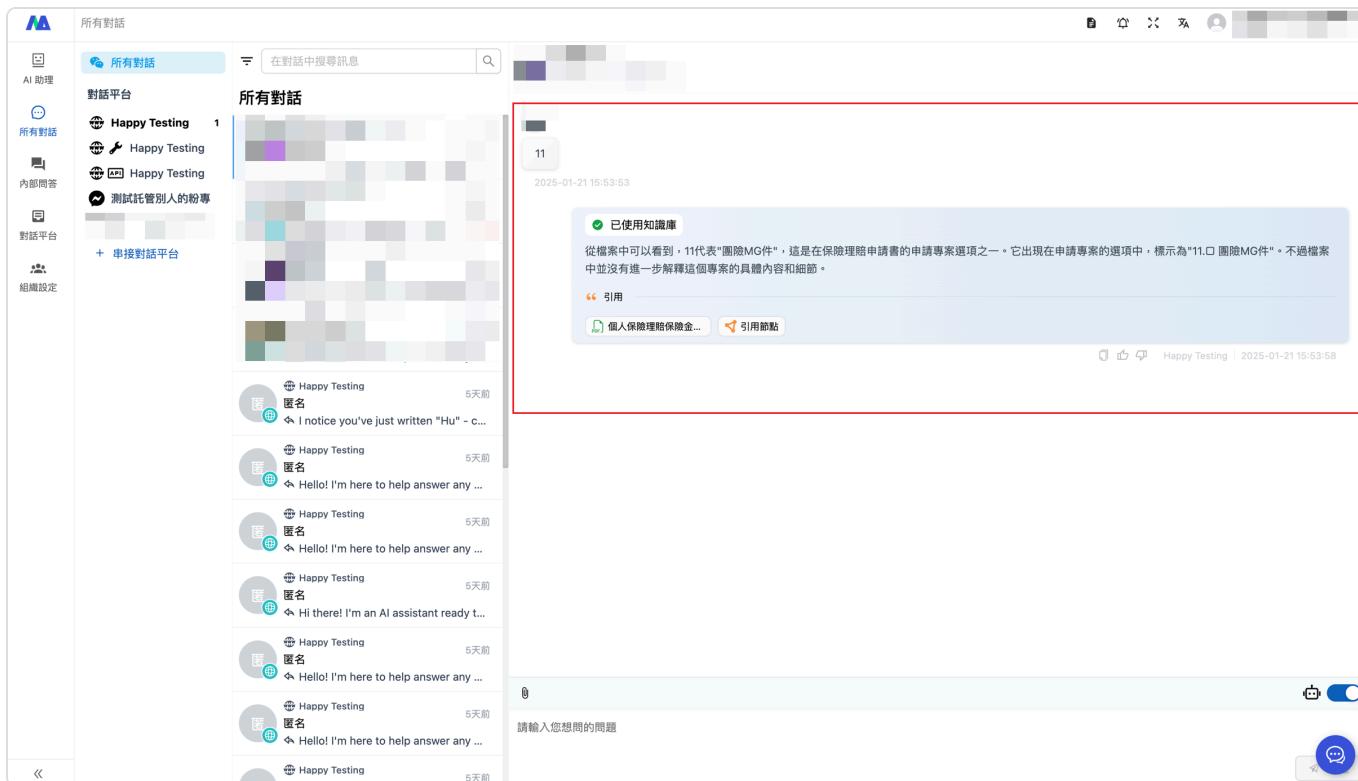
### 3. AI Assistant Settings

Enter the messaging platform name, select the AI Assistant and Messenger channel (which is the fan page you just claimed)



## 4. Verify Integration Results

Next, you can try sending a test message to that messaging platform in MaiAgent's internal chat. If the AI Assistant can respond normally, the integration is successful.



You can also open the AI Assistant conversation on the fan page and send a test message. If the bot can respond normally, the integration is successful.

The screenshot shows the Facebook Business Manager interface. On the left, there's a sidebar with various tools like Professional Dashboard, Insights Report, Ad Center, and Business Suite. A prominent blue button at the bottom says "Post Ad". The main area displays the "MaiAgent 智能回覆06" page, which has a large yellow profile picture with a stylized 'M'. The page title is "MaiAgent 智能回覆06" and it shows 0 posts and 0 followers. Below the title, there are tabs for Posts, About, Mentions, Comments, Followers, Photos, and More. A message bubble indicates "切換為 MaiAgent 智能回覆06 的粉絲專頁並開始管理。" with a "立即切換" button. The "Posts" section shows a single post from "MaiAgent 智能回覆06" at 3:53 PM, which contains a text block about MG件. The right side of the screen shows a preview of the post with its text content and interaction options.

# Integrate Chat Platform: Telegram

## Pre-Integration Checklist

An "AI Assistant" has been created on the [MaiAgent platform](#)

A Telegram account has been registered

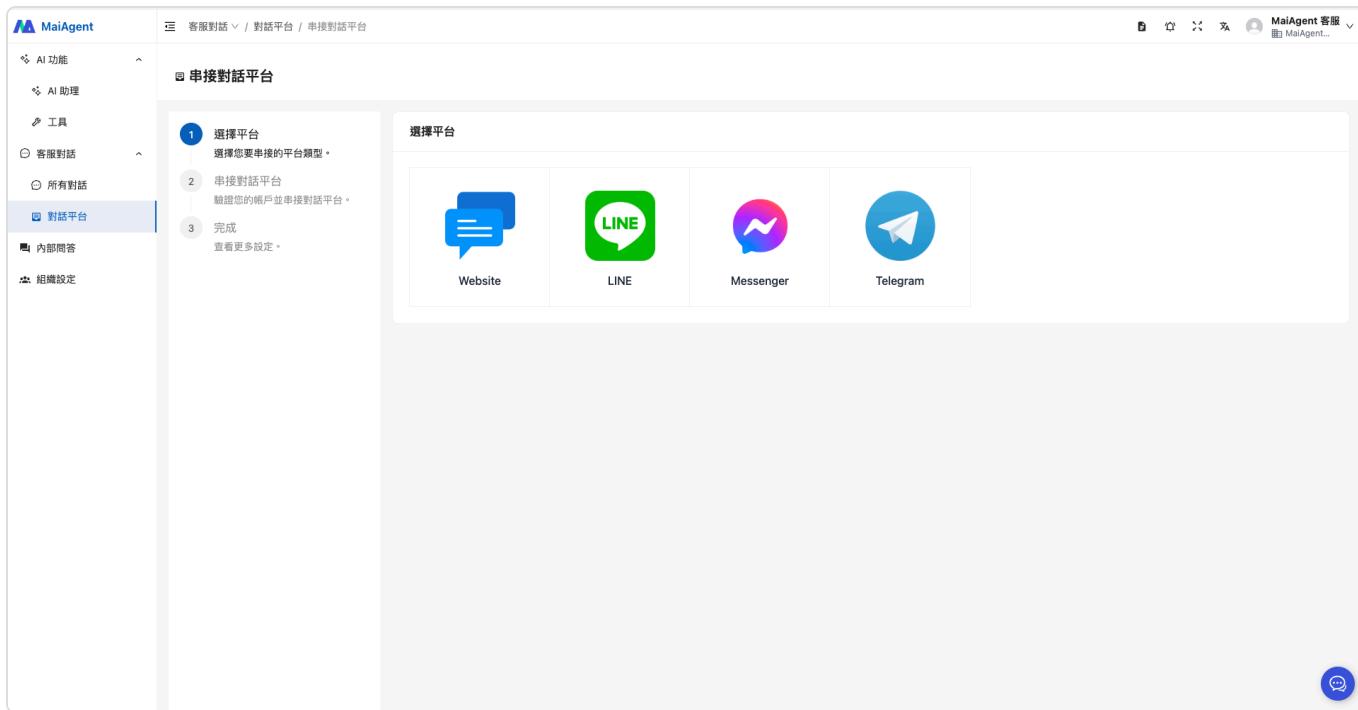
## Start Integration

1. Navigate to "Conversation Platforms" in the left menu, click the "Integrate Conversation Platform" button in the upper right corner

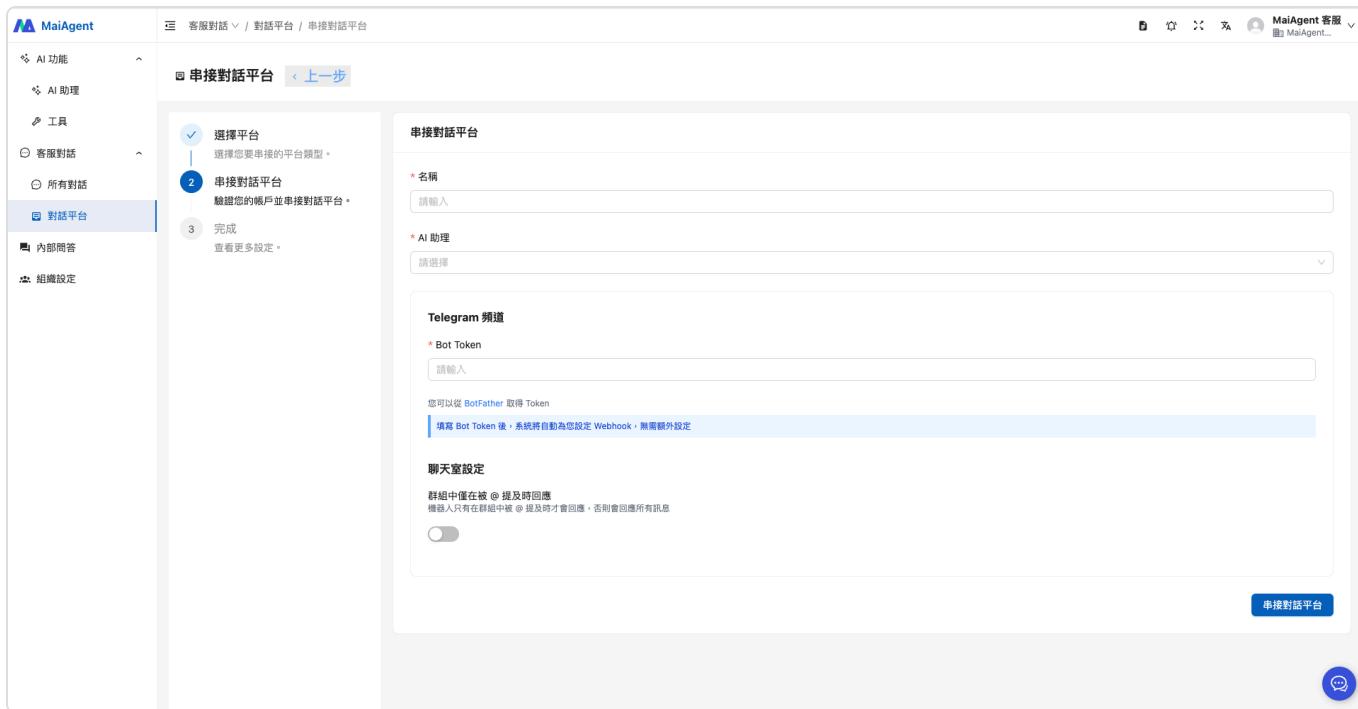
The screenshot shows the MaiAgent platform interface. On the left, there is a sidebar with various menu items: AI 功能, AI 助理, 工具, 客服對話, 所有對話, [選項] 對話平台 (highlighted in blue), [選項] 內部問答, and [選項] 組織設定. The main content area displays a table of conversation platforms. The table columns are: ID, 名稱 (Name), 頻道 (Channel), 自動回覆時段 (Automatic Response Period), and 操作 (Operations). The table contains 11 rows of data. At the bottom right of the main area, there are pagination controls: '共 25 條資料' (25 pages), page numbers '1 2 3 > 10 條/頁', and a '跳至' (Jump To) input field. In the top right corner of the main area, there is a blue button labeled '+ 串接對話平台' (Integrate Conversation Platform).

ID	名稱	頻道	自動回覆時段	操作
7519c91c-4f9e-42b6-b777-d534a31aa88e	MaiAgent 工具製作助理	API	24 小時回覆	[編輯] [刪除]
5c84e524-c8eb-49c9-a682-5c4a8bb20e47	MaiAgent 工具製作助理	內部	24 小時回覆	[編輯] [刪除]
b8c873a0-607b-443f-9bd5-4570bd8bd5f6	MaiAgent 工具製作助理	網頁	24 小時回覆	[編輯] [刪除]
48a2aff0-df69-4506-b438-4c2b6b7ef0fa	MaiAgent 官方測試	LINE	24 小時回覆	[編輯] [刪除]
31956ff6-b560-403a-a65c-274ca93e5ec2	MaiAgent 客服助理	LINE	24 小時回覆	[編輯] [刪除]
e2eadb95-adda-4aa1-a5dd-91052c03161c	Maiagent API 助手	API	24 小時回覆	[編輯] [刪除]
4a19bb17-b04d-4c88-8dcbb-2ff9a2533d24	Maiagent API 助手	內部	24 小時回覆	[編輯] [刪除]
15830a5f-a34e-4cca-ad7f-fa4505c84bbb	Maiagent API 助手	網頁	24 小時回覆	[編輯] [刪除]
00134659-d5c4-43b4-b431-01a5da4254b2	建立角色指令的助理	API	24 小時回覆	[編輯] [刪除]
14268ea2-436c-4a2b-8fb4-45f7c749db8c	建立角色指令的助理	內部	24 小時回覆	[編輯] [刪除]

2. Select Telegram as the conversation platform



### 3. Fill in the conversation platform name and select an AI Assistant

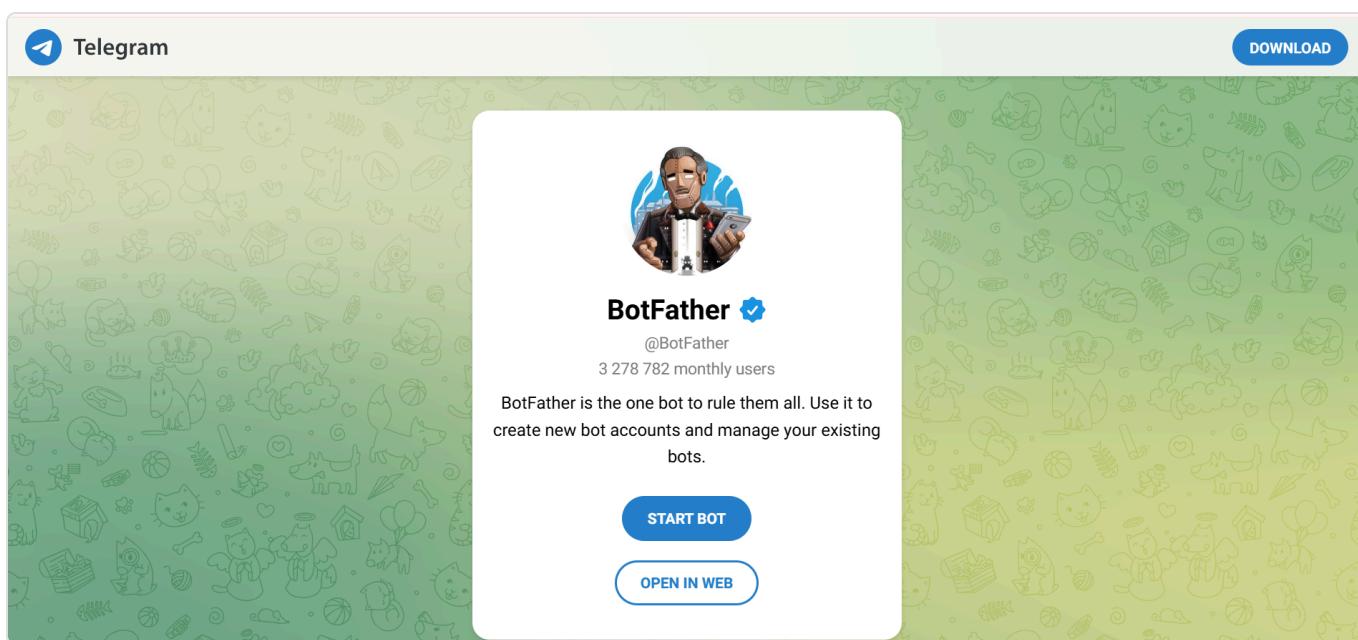


### 4. Obtain Bot Token from BotFather <https://t.me/BotFather>

a. Click the "BotFather" link: <https://t.me/BotFather>

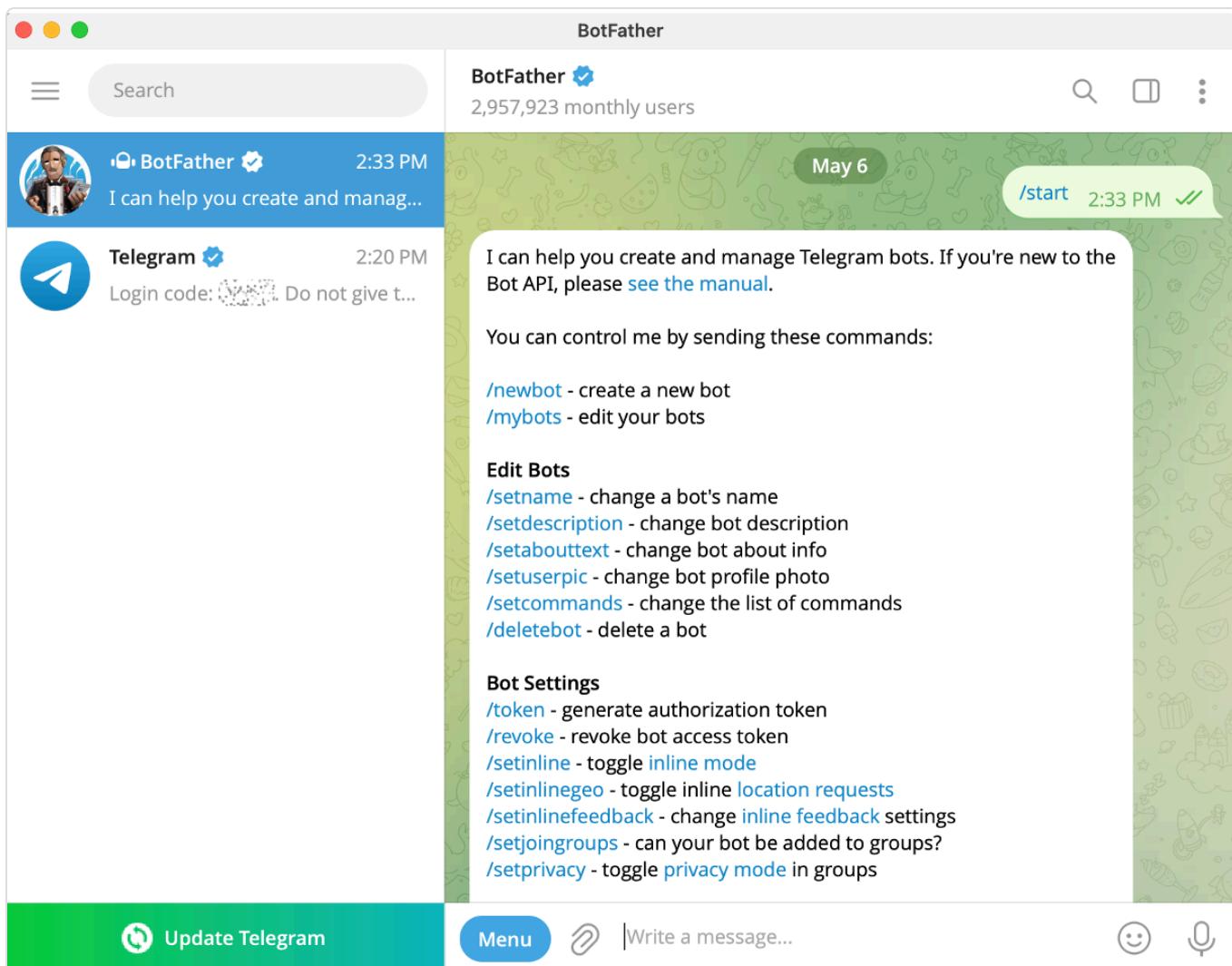
The screenshot shows the MaiAgent interface with the '对话平台' (Chat Platform) tab selected in the sidebar. The main area is titled '连接对话平台' (Connect to Chat Platform) with a 'Next Step' button. A step-by-step guide on the left indicates the current step is '选择平台' (Select Platform). The right side contains fields for 'Name' (输入), 'AI Assistant' (请选择), and 'Telegram 频道' (Telegram Channel) with a 'Bot Token' input field. A note says '您可以使用 BotFather 取得 Token' (You can get the Token from BotFather) and '填寫 Bot Token 後，系統將自動為您設定 Webhook，無需額外設定' (After filling in the Bot Token, the system will automatically set up Webhook for you, no additional setup required). There is also a '聊天室設定' (Chat Room Setting) section with a toggle switch.

## b. Enter the Telegram BotFather channel

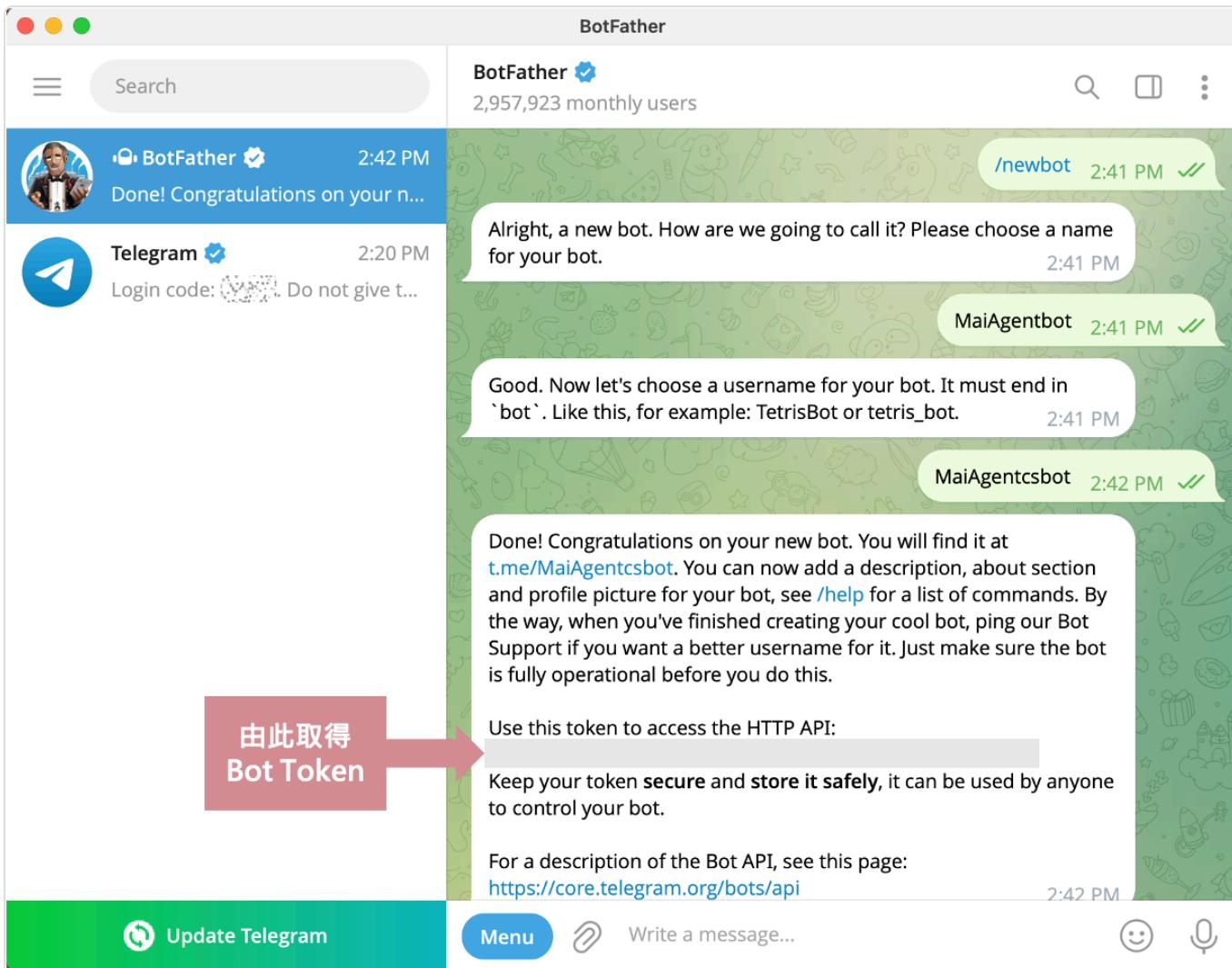


## c. Click "OPEN IN WEB" (if using web version)

After clicking, BotFather will prompt you to click start to begin the conversation:

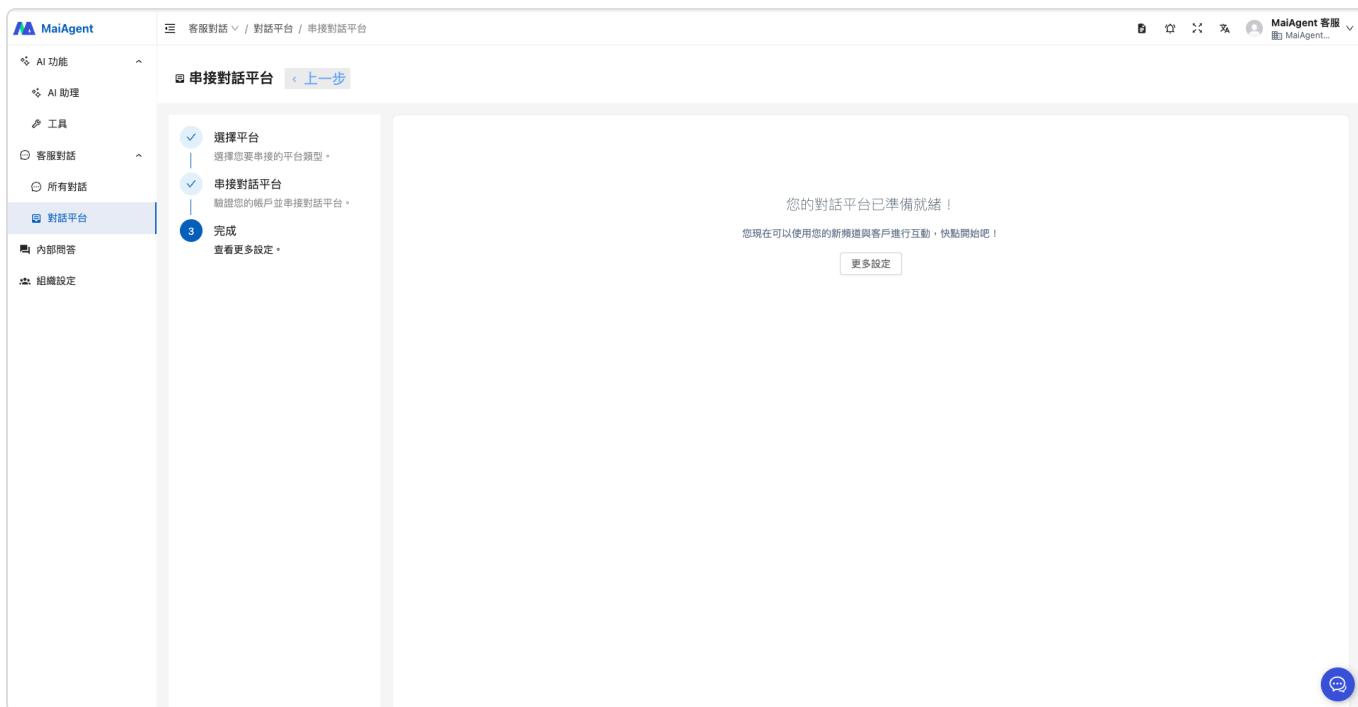
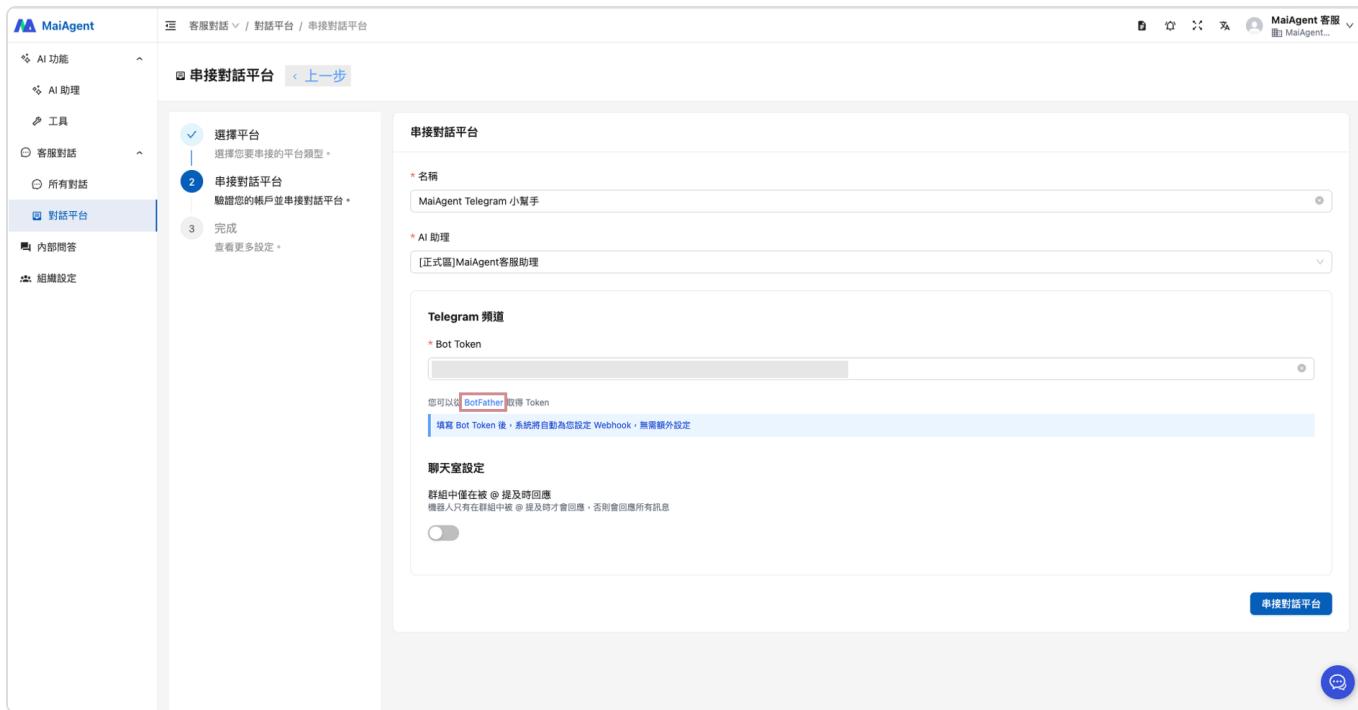


d. Click "**/newbot**", follow the instructions to enter the Bot name and username, and you will receive the Bot Token



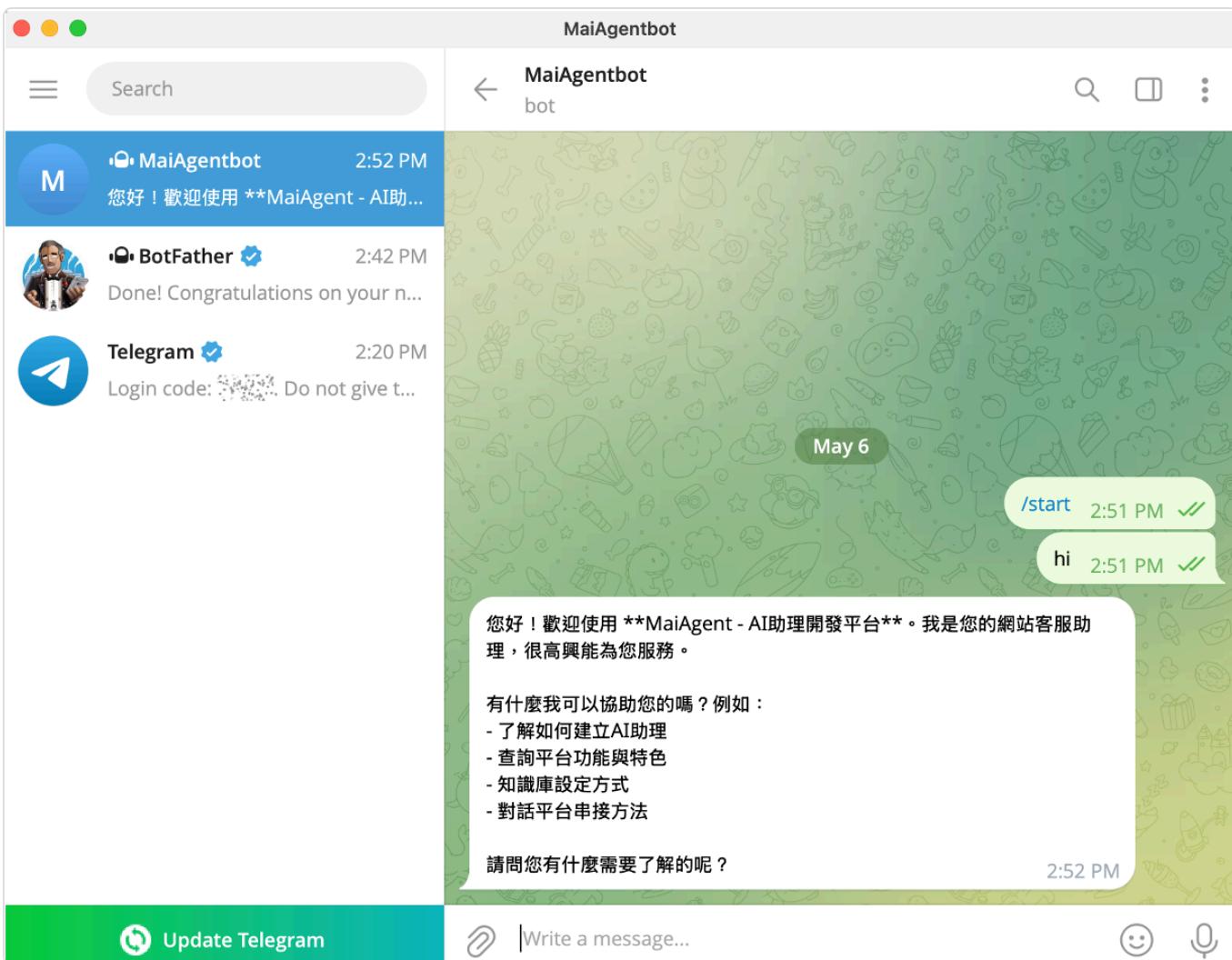
## 5. Return to the MaiAgent conversation platform integration interface and paste the Bot Token you just obtained

After pasting the Bot Token, click the "Save" button in the lower right corner to complete the integration setup



## 6. Verify successful integration

You can test by having a conversation with the Telegram Bot you just configured



If the related conversations can be viewed in all conversations on MaiAgent, the integration is successful!

The screenshot shows the MaiAgent platform's interface. On the left, there is a sidebar with navigation links for 'AI 功能', 'AI 助理', '工具', '客服對話', '所有對話', '對話平台', '內部', '組織設定', and '統計分析'. The '所有對話' section is currently selected. In the main area, there is a search bar and a list of conversations. One conversation is highlighted, showing messages between 'Sharon Wu' and the bot. The messages include '您好！歡迎使用 \*\*MaiAgent - AI助...', 'hi', and a list of topics the bot can help with. Below this, there is a message from the user asking '請問您有什麼需要了解的呢？'. The right side of the screen shows a larger preview of the conversation with Sharon Wu, including the timestamp '2025-05-06 14:51:56' and a note that the bot is a 'MaiAgent 服務助理' (MaiAgent Service Assistant).

# Track AI Assistant Performance

## All Conversations Features

Click on "**Customer Service Chat > All Conversations**" in the left function bar to view conversation records from all dialogue platforms.

When necessary, online customer service personnel can intervene in conversations and reply directly within the chat box.

You can also toggle the "**Auto Reply**" switch in the bottom right corner to turn the auto-reply function on or off.

The screenshot shows the MaiAgent platform's 'All Conversations' feature. The left sidebar has sections for AI功能, AI助理, 工具, and 客服對話. Under '客服對話', there is a '所有對話' section which is currently selected. The main area lists conversations with users, showing their names and messages. A modal window titled '如何登入 MaiAgent 平台' provides instructions for logging in. At the bottom right, there is a toggle switch for 'Auto Reply'.

# Response Quality Control

What is reply quality control? How to train it?

## How to View

Navigate to "[AI Features > AI Assistant > Reply Quality Control](#)" in the left function menu to view recent conversation records and response content processed by the AI assistant, helping you understand the assistant's actual performance and usage.

If you need further analysis or data consolidation, you can also click the blue "Export" button in the upper right corner. The system will automatically export the relevant conversation data as an Excel file for subsequent organization and use.

用戶輸入訊息	輸出訊息	修飾輸入訊息	參考資料	誠實性評分	回答相關性評分	上下文精確度評分
如何進行知識庫文件的批次...	你好！很高興能協助你了解 ...	如何進行知識庫文件的批次...	[{"attachments": [附件和權...]	86	0	96
如何進行串流對話	好的，很高興能協助你了解...	如何進行串流對話	[""]	91	47	0
你好	你好！很高興認識你。我是...	你好	[{"title": "日期"}, "totalWor...	78	33	47
你好	你好！很高興認識你。我是...	你好	[""]	0	33	0
你好	你好！很高興為您服務。...	你好	[""]	100	33	0
哪個對話API在互通的時候...	好的，這個問題問得很好！...	哪個對話API在互通的時候...	[{"n "parser": {"n "id": "55..."	95	55	99
如何進行串流對話	好的，沒問題！如果你想要...	如何進行串流對話	["", "required": true}], "tag...	100	44	99
哪個對話API在互通的時候...	好的，這個問題問得很好！...	哪個對話API在互通的時候...	[{"n "parser": {"n "id": "55..."	100	45	99
POST /api/chatbots/chatb...	好的，我們來詳細解析一下 ...	Here are a few options for ...	["<div class="api-heading">...	100	77	99
我有什麼辦法可獲取特定成...	好的，這個問題也很實際！...	Here are a few options for ...	["", "schema": {"type": "int..."	95	0	99

## Use Cases

### Customer Service Quality Audit

Analyze whether the assistant provides correct and clear responses to help continuously optimize reply content.

## **Training Materials**

Extract common questions and high-quality responses for use as internal training materials.

## **Reply Strategy Adjustment**

Adjust knowledge base content or role settings based on actual user questions and interaction behavior.

## **Performance Evaluation and Report Generation**

Support management in creating monthly or weekly reports to evaluate AI assistant usage effectiveness and coverage.

You can clarify the reasons for the following related issues: Whether sufficient data is provided  
Whether RAG found the data LLM cannot answer questions based on reference materials

# Webhook

## Purpose

Developers need to provide an API endpoint (like a URL) where the system can send data. When MaiAgent's AI assistant generates responses on the conversation platform, these responses will be automatically sent to your configured Webhook endpoint.

This setup allows you to integrate AI responses into your own system, such as logging them, forwarding them to users, or using them for other applications.

All Webhook transmission records are also centrally displayed on this page by the system, making it convenient for you to view, track, or troubleshoot issues at any time.

### How to integrate API?

A screenshot of the MaiAgent AI Assistant interface. The left sidebar shows navigation categories like 'AI 功能', 'AI 助理' (which is currently selected), '工具', '客服對話', '所有對話', '對話平台', '內部問答', and '組織設定'. Under 'AI 助理', there are sections for '基本' (Basic), '知識庫', '爬蟲 (Beta)', '回覆品質控管', 'Webhook' (which is highlighted in blue), and '使用分析'. The main content area has a table with columns: 對話 ID, 訊息 ID, URL, 狀態碼, 建立時間, and 操作. A small icon of a folder with a document is shown next to the URL column. At the bottom right of the main area is a blue circular button with a white question mark icon.

## Use Cases

### Customer Service System Integration

After the AI assistant answers user questions, the response content is synchronized to the enterprise's customer service system via Webhook, making it convenient for customer service personnel to view

conversation records, perform follow-up processing, or take over manually.

## **Real-time Notification Push**

Push AI assistant responses or specific events (such as anomalies) to communication tools like Slack, Line Notify, or Email to remind relevant personnel to handle them promptly.

## **Data Analysis and Record Archiving**

Automatically send all AI conversation data to data warehouses, cloud databases, or Google Sheets for usage behavior analysis, quality assessment, or creating interaction record archives.

## **Internal Process Automation**

When users report issues, request resources, or report anomalies through the AI assistant, Webhook can automatically connect this data to internal form systems or task management tools (such as Jira, Notion) for subsequent tracking.

# Usage Analytics

## How to View

Navigate to "AI Assistant" in the left sidebar, then select "Usage Analytics" to view the AI assistant's conversation processing dashboard.

Word Count

Conversation Count

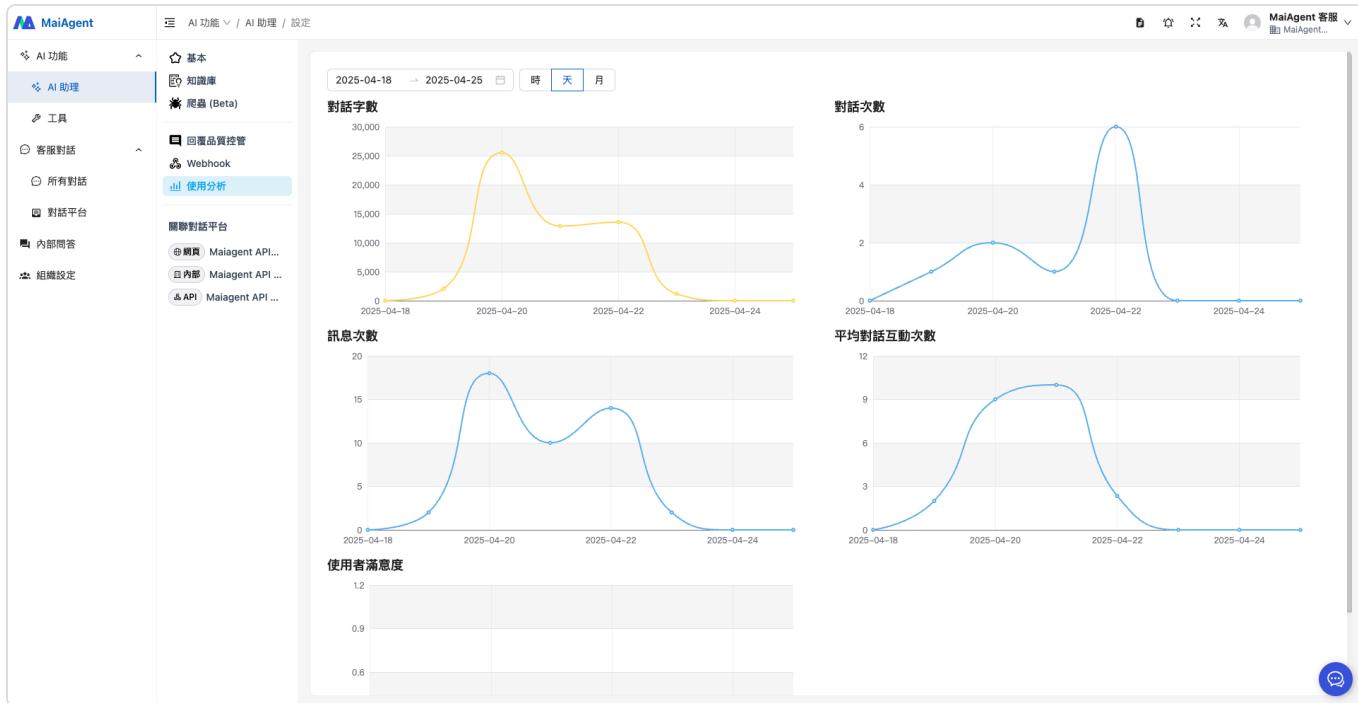
Message Count

Average Messages per Conversation

User Satisfaction Rate

Time Filter (by date, month, day, hour)

Through these metrics, you can understand the AI assistant's usage from multiple perspectives.



## Detailed Statistics Explanation

### 1. Words Count

#### Calculation Method:

- **Text Word Count:** Calculates the character count of message content

- **Image Cost:** Each image is calculated based on the configured image word cost
- **Total Word Count** = Message Content Word Count + (Number of Images × Image Word Cost)

**Statistical Scope:** Includes user input messages and AI assistant reply messages, supports daily and monthly time granularity statistics

---

## 2. Conversations Count

### Calculation Method:

- Counter increments by +1 each time a new conversation is created
- When the first message in a conversation is created, it triggers a conversation statistics update

**Update Timing:** When a user starts a new conversation (first message)

**Statistical Scope:** Supports hourly, daily, and monthly time granularity statistics

---

## 3. Messages Count

### Calculation Method:

- Counter increments by +1 each time a new message is created
- Includes user input messages and AI assistant reply messages

**Update Timing:** Triggers statistics update upon creation of each message

**Statistical Scope:** Supports hourly, daily, and monthly time granularity statistics

---

## 4. Average Messages per Conversation

### Calculation Formula:

$$\text{Average Messages per Conversation} = \text{Messages Count} \div \text{Conversations Count}$$

(displays 0 if Conversations Count is 0)

### Meaning:

- Represents the average number of messages per conversation
- Reflects the interaction depth between users and the AI assistant
- Higher values indicate deeper conversations and more frequent interactions

**Statistical Scope:** Supports hourly, daily, and monthly time granularity statistics

---

## 5. User Satisfaction Rate

### Calculation Formula:

```
User Satisfaction Rate = Number of Likes ÷ Total Feedback Count (displays 0 if  
Total Feedback Count is 0)
```

```
Total Feedback Count = Number of Likes + Number of Dislikes
```

### Meaning:

- Represents the proportion of positive feedback (like rate)
- Value range: 0% ~ 100%
- Higher values indicate greater user satisfaction with AI assistant responses

### Feedback Mechanism:

- Users can give "likes" or "dislikes" to AI assistant responses
- Supports real-time statistics updates

**Update Timing:** When users provide feedback (create, update, delete)

**Statistical Scope:** Supports hourly, daily, and monthly time granularity statistics

---

## Statistics Update Mechanism

**Real-time Updates:** When relevant events occur (new messages, new conversations, feedback changes), statistics updates are triggered immediately

### Time Granularity Support:

- **Hourly:** Suitable for real-time monitoring
- **Daily:** Suitable for daily report analysis
- **Monthly:** Suitable for monthly reports and trend analysis

## Application Scenario: Usage Effectiveness Evaluation

Observing the trend changes in "User Satisfaction Rate" and interaction count can evaluate whether the AI assistant's response quality meets expectations, serving as a basis for optimization.

## Differentiate AI Assistant Usage by Identity

# Contacts

## What are Contacts?

Contacts are one of MaiAgent's core features, like a business's "customer card file." It enables businesses to create dedicated identity profiles for each customer, ensuring that every conversation provides a personalized service experience.



Identity Recognition Example

Imagine when a customer interacts with you through a website chat room, the system can immediately identify "This is Mr. Zhang, he is a VIP member" or "This is a new visitor, only partial documents can be opened," and provide corresponding service content and permissions accordingly.

## Why do we need the Contacts feature?

### Personalized Service Experience

Every customer has unique needs and background. The Contacts feature enables AI assistants to:

Remember conversation history with that customer

Provide appropriate information based on customer identity

Avoid repeatedly asking for known information

## Precise Permission Management

Different customers should see different content:

VIP members can view exclusive offers

Regular members see standard service content

Visitors can only use public information

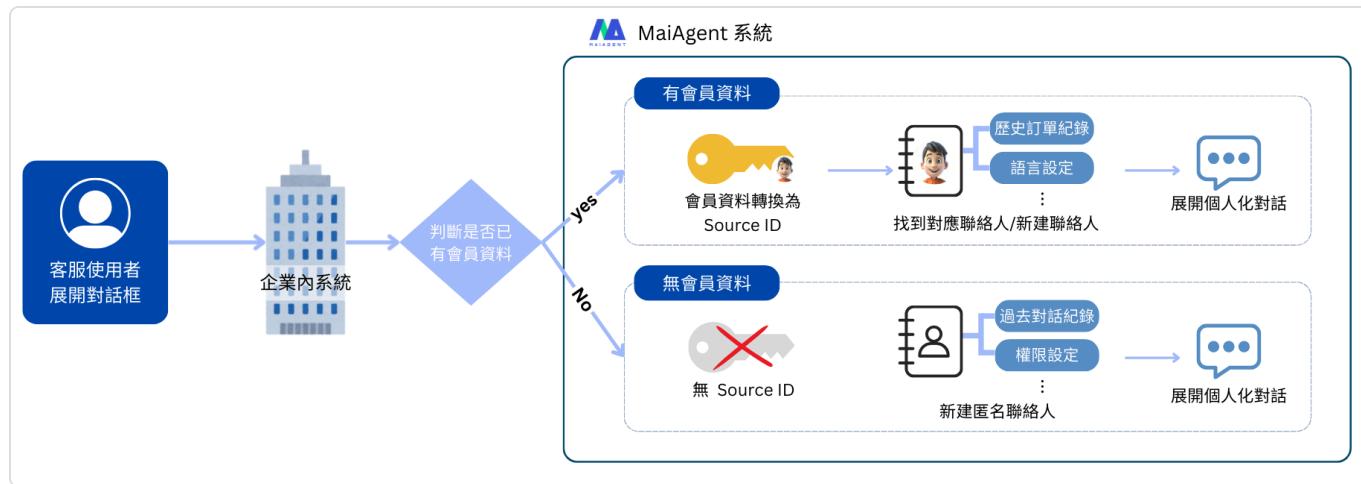
## Data Security Protection

Ensure customers can only access their own data, preventing information leakage.

### How do Contacts work?

When a user opens the conversation box, the conversation request is sent to the enterprise's internal system for processing, determining whether member information has been included. Based on the judgment result, the system decides to find/create a contact (anonymous or non-anonymous). Regardless of which path is taken, personalized conversations will eventually unfold, ensuring that every user receives a suitable personalized experience.

Contact Operation Diagram



Contact Operation Diagram

### Contact Type Description

MaiAgent's contact system is divided into two types based on user identity recognition methods:

## Contact Type Comparison Table

Item	Anonymous Contacts	Non-Anonymous Contacts
Applicable Situation	Visitors entering directly from the web who have not logged into the enterprise member system, and therefore have no account to obtain user data	Logged-in members or those entering through other platform accounts (such as Facebook, LINE, etc.), where the system can obtain user name and account information
Identity Recognition	Unable to obtain specific personal information	Have clear identity recognition information (such as: name, profile picture, etc.)
System Settings	Set as "anonymous" in the MaiAgent system	Original member account ID will be converted to Source ID
Permission Management	Knowledge base document permissions, conversation platform management	Same for both
Data Mapping	No Source ID, cannot be mapped to enterprise member data	Ensure contacts can always be mapped to the correct user through Source ID
Creation Method	If entering as a visitor (without member identity), a new anonymous contact is automatically created for each conversation	System automatically creates or updates through MaiAgent API based on member login information For detailed integration, please refer to: <a href="#">Technical Manual—Contact Introduction and Integration</a>
Recording Mechanism	System records user conversation history according to cache	Maintain conversation continuity through Source ID and contact mapping

Importance of Source ID Source ID is the key bridge connecting MaiAgent contacts with the enterprise member system. When users interact with the enterprise through different channels (website, APP, social platforms), the system can correctly identify user identity through Source ID, ensuring conversation continuity and personalized experience.

## Setting up Contacts

### Anonymous Users

User creates a new conversation, system automatically creates a new anonymous user in the background (each conversation is one anonymous user) 



聯絡人						
ID	聯絡人	對話平台	來源ID	查詢元資料	建立時間	最後操作
51b955ee-fe8f-41ee... [Edit]	匿名	自定義助理樣式	-	-	2025-08-25 10:05:27	<span>[Edit]</span> <span>[Delete]</span>
80c22eb0-a0e9-49e... [Edit]	匿名	-	-	-	2025-08-25 09:49:00	<span>[Edit]</span> <span>[Delete]</span>
5d5d0035-2c46-488... [Edit]	匿名	逐字稿問答助理	-	-	2025-08-22 18:09:42	<span>[Edit]</span> <span>[Delete]</span>
64735950-dfd7-481... [Edit]	匿名	逐字稿問答助理	-	-	2025-08-22 18:06:42	<span>[Edit]</span> <span>[Delete]</span>
d8338677-f974-411... [Edit]	匿名	逐字稿問答助理	-	-	2025-08-22 18:01:52	<span>[Edit]</span> <span>[Delete]</span>
a7c90db4-24bf-480... [Edit]	匿名	逐字稿問答助理	-	-	2025-08-22 15:41:09	<span>[Edit]</span> <span>[Delete]</span>
4e43a099-884a-4df... [Edit]	匿名	逐字稿問答助理	-	-	2025-08-22 15:32:42	<span>[Edit]</span> <span>[Delete]</span>
819f59fd-f7dd-434f... [Edit]	匿名	霜淇淋去哪兒？	-	-	2025-08-21 22:33:07	<span>[Edit]</span> <span>[Delete]</span>
3417997c-6a2c-4ea... [Edit]	匿名	AI 國際英語通	-	-	2025-08-21 22:31:20	<span>[Edit]</span> <span>[Delete]</span>

Includes contact ID, conversation platform records, creation time, and other information

You can click edit to manually edit anonymous contact information:

ID	聯絡人	對話平台	來源ID	查詢元資料	建立時間	操作
51b955ee-fe8f-41ee... [Edit]	匿名	自定義助理樣式	-	-	2025-08-25 10:05:27	<span>[Edit]</span> <span>[Delete]</span>

所有

### 編輯聯絡人

\* 姓名

匿名

頭像

+ 上傳

\* 對話平台

自定義助理樣式

來源ID

來源ID

查詢元資料

查詢構建器

取消 確認

Through editing, you can:

Change linked member information: Link anonymous contacts to member data by entering Source ID

Update permission levels: Open or restrict the scope of document reading

Supplement customer name, contact information, and other basic data

## Non-Anonymous Users

User enters using other conversation platforms (such as: LINE, FB Messenger, Telegram):

The backend automatically creates corresponding non-anonymous users based on FB user information (including Source ID, contact name, profile picture, etc.):



✓

...

你好，你可以幫我做甚麼呢

你好！我可以幫助你做很多事情，主要是透過搜尋內部知識庫來為你提供資訊和答案。以下是我能幫助你的一些方面：

## 📚 知識查詢

- 回答各種主題的問題
- 提供事實資料和統計數據
- 解釋複雜的概念或理論

## 🔎 資訊搜尋

- 查找特定主題的詳細資訊
- 搜尋相關的背景知識
- 提供多角度的資訊參考

##💡 學習協助

- 幫助理解困難的概念
- 提供學習資料和參考資訊
- 解答學術或專業問題



Aa



Screenshot of a contact management interface for a company named "思博智能股份有限公司". The interface includes a sidebar with various functional tabs like AI Assistant, Knowledge Base, Tools, Customer Chat, All Chats, Chat Platform, and Contacts. The Contacts tab is currently selected and highlighted with a blue border.

The main area shows a list of contacts with the following columns: ID, Contact Person, Chat Platform, Source ID, Search Origin, Creation Time, Last Update Time, and Operations (Edit, Delete). A search bar at the top allows filtering by contact person or chat platform. A red box highlights the row for contact ID 5032b068-e1ee-4198..., which has the contact person listed as "陳" and the source ID as "Testing".

ID	聯絡人	對話平台	來源ID	查詢元資料	建立時間	最後更新時間	操作
1099e469-d39d-4b5f...	匿名	霜淇淋去哪兒？	-	-	2025-08-21 12:31:06	2025-08-21 12:31:06	
71b4bc5a-8792-4fc2...	匿名	霜淇淋去哪兒？	-	-	2025-08-21 12:30:01	2025-08-21 12:30:01	
4af669db-d404-4e32...	匿名	霜淇淋去哪兒？	-	-	2025-08-21 12:28:54	2025-08-21 12:28:54	
9a7eff44-290b-4073-a...	匿名	霜淇淋去哪兒？	-	-	2025-08-21 12:20:39	2025-08-21 12:20:39	
3330a00b-7bd6-4e6c...	匿名	霜淇淋去哪兒？	-	-	2025-08-21 12:17:33	2025-08-21 12:17:33	
5032b068-e1ee-4198...	陳	Testing	239737375...	-	2025-08-21 12:15:14	2025-08-25 11:18:42	
dd62aca5-0d96-4ab5...	匿名	霜淇淋去哪兒？	-	-	2025-08-21 12:10:06	2025-08-21 12:10:06	
967d720c-bb85-4450...	匿名	霜淇淋去哪兒？	-	-	2025-08-21 11:48:37	2025-08-21 11:48:37	
7f67d1be-dffd-45b2...	匿名	霜淇淋去哪兒？	-	-	2025-08-21 11:43:47	2025-08-21 11:43:47	
804409b4-3561-45b0...	匿名	逐字稿問答助理	-	-	2025-08-21 11:38:50	2025-08-21 11:38:50	

共 321 條資料 < 1 2 3 4 5 6 ... 33 > 10 條/頁 跳至

You can still click the edit button to edit non-anonymous contact information

編輯聯絡人

\* 姓名  
陳

頭像

\* 對話平台  
Testing

來源ID  
23973737538993612

查詢元資料 查詢構建器

查詢元資料

取消 確認

Through editing, you can:

Complete and correct data

Correct incorrect query metadata settings (update open scope based on permissions)

Modify Source ID within the enterprise to link correct contact information with member information

Contacts rely on Source ID for mapping, so please ensure that the Source ID is synchronized with the enterprise internally when editing, otherwise it may cause data mapping errors during subsequent program synchronization with internal enterprise information.

## Adding Contacts

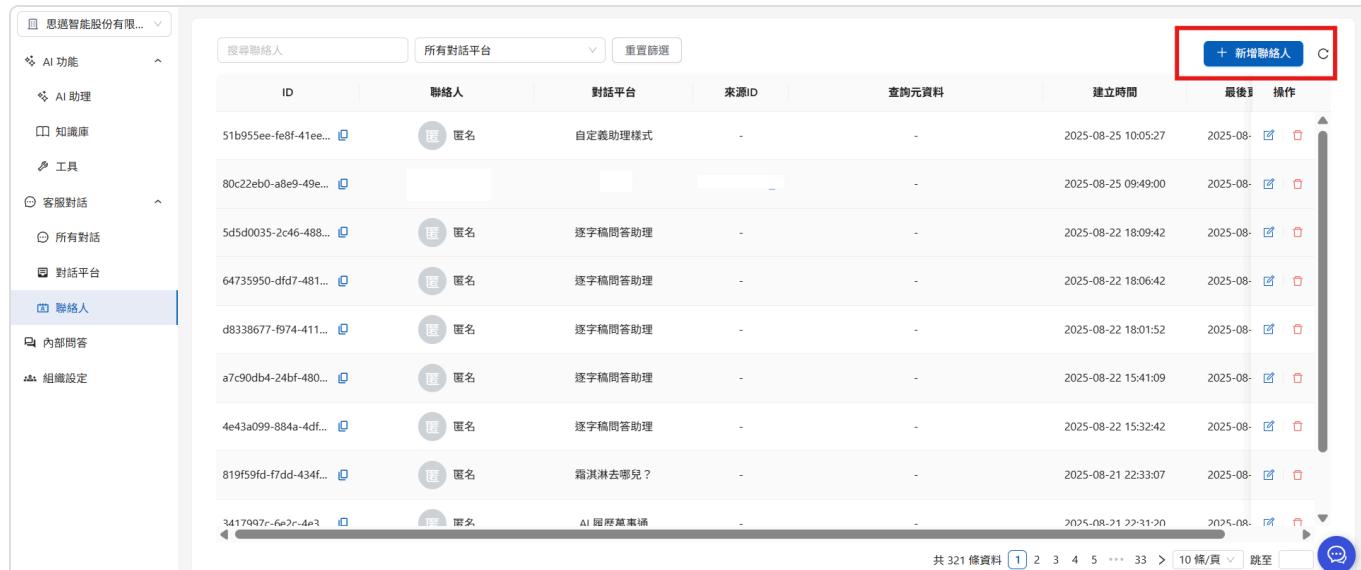
The add contact feature is mainly used for **proactively creating customer profiles with preset permissions**. If you have not specified permission scope in Web Chat, you can pre-create contacts to complete permission configuration and service preparation before customers actually initiate conversations.

To use javascript scripts to specify permission scope in Web Chat initialization, please refer to:  
[Technical Manual: Getting Started—Using JSON Format](#)

## Core Function Description

Through manually adding contacts, system administrators can pre-create user profiles with specific identities in the customer service system and configure corresponding **query metadata permissions** for them. When these pre-created contacts later interact with customer service through **specified conversation platforms**, the system will immediately apply pre-set permission levels through **Source ID automatic matching mechanism**, ensuring they can access data content that matches their identity.

You can click add contact to enter the edit page and add information:



The screenshot shows a contact management interface with a sidebar and a main content area. The sidebar contains navigation links such as AI 功能, AI 助理, 知識庫, 工具, 客服對話, 所有對話, 對話平台, 聯絡人 (selected), 內部問答, and 組織設定. The main content area displays a table of contacts with columns: ID, 聯絡人, 對話平台, 來源ID, 查詢元資料, 建立時間, 最後回, and 操作. A red box highlights the '新增聯絡人' (Add Contact) button in the top right corner of the table header. The table lists several contacts, each with a small profile icon and status information. At the bottom, there is a pagination bar showing '共 321 條資料' and a '10 條/頁' dropdown.

新增聯絡人

\* 姓名

頭像

+

上傳

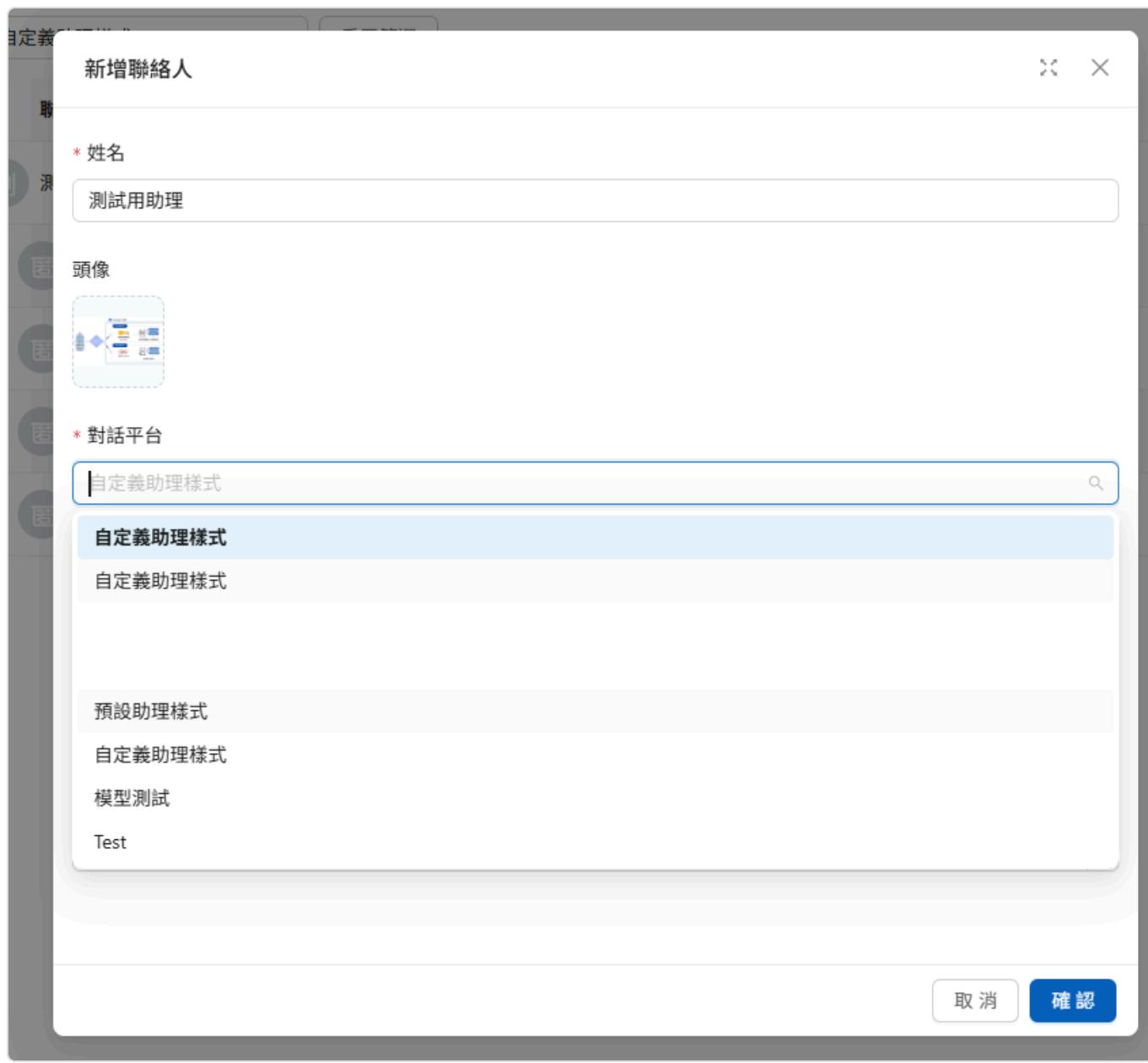
\* 對話平台

來源ID

查詢元資料

取消確認

On the page, you can add contact name, specify conversation platform, and other information:



## Permission Management

According to enterprise needs, you can use query metadata to restrict the scope of document usage for different contacts, such as:

### Restrict by Membership Level

**VIP Members:** Can query all knowledge bases, advanced FAQs, product technical documents

**Regular Members:** Can only query basic FAQs, product user manuals

**Visitor Users:** Can only query public FAQs, basic product introductions

### Distinguish by Department Permissions

**Internal Employees:** Can query internal operation manuals, system maintenance documents, complete product information

**Distributors:** Can query product specifications, price lists, sales data

**General Customers:** Only limited to querying usage instructions, FAQs, warranty information

## Classify by Product Tags

**Enterprise Version Users:** Can query documents tagged with "Enterprise Features", "Advanced Settings"

**Personal Version Users:** Can only query documents tagged with "Basic Features", "Personal Use"

**Trial Users:** Can only query content tagged with "Trial Instructions", "Getting Started Guide"

To learn more about query metadata, please refer to: [Knowledge Management Permissions: Query Metadata](#)

In contacts, when setting query metadata, the system will only authorize you to configure based on the knowledge base of the conversation platform you specified. If you configure for knowledge bases of other conversation platforms, the following warning message will appear:

新增聯絡人

測試用助理

頭像



\* 對話平台

模型測試

來源ID

\*\*\*\*\*41ee-ab3c-236688502a54

查詢元資料

查詢構建器

```
{  
    "labelRelations": null,  
    "knowledgeBases": [  
        {  
            "knowledgeBaseId": "21276ac4-35c7-4f9a-95ee-7e18191351ac",  
            "chatbotFields": [  
                {  
                    "name": "CustomerID",  
                    "type": "Text",  
                    "value": "1234567890"  
                }  
            ]  
        }  
    ]  
}
```

⚠ 警告

查詢元資料中的知識庫 21276ac4-35c7-4f9a-95ee-7e18191351ac 在當前對話平台中不存在，請重新配置查詢元資料。

取消 確認

## Automated Integration

For technical teams, MaiAgent also provides API interfaces that can seamlessly integrate with existing enterprise systems

For details, please refer to: [Technical Manual—Contact Introduction and Integration](#)

Regardless of enterprise size, the Contacts feature can help you provide better customer service experiences while ensuring data security and operational efficiency. Through classified management of anonymous and non-anonymous contacts, precise Source ID mapping mechanisms, and flexible

creation methods, enterprises can provide the most suitable service experience for different types of users and be fully prepared before customer interactions.

# Knowledge Management Permissions: Query Metadata

## Feature Overview

When deploying AI dialogue systems, it is typically necessary to implement fine-grained control over the available scope of "Knowledge Bases

AI Assistants

Conversation Platforms" due to different user permissions and usage requirements.

In MaiAgent, you can use query metadata attached to different conversation/identity levels to determine "what content this person/conversation can reference."

## What is Query Metadata?

Query metadata is a set of dynamic conditions that limit the query scope, allowing you to specify the data content that users can query under a specific conversation platform, such as "knowledge bases, FAQs, documents matching tag conditions," etc.

It does not replace roles or contacts, but rather allows these identities to "function conditionally," implementing conversation-level least privilege control.

**Roles**

**Contacts**

**Conversations are containers; query metadata is the conditional restriction that actually controls the visible scope**

Learn more through the following articles: [Contacts](#) [Role Permission Management](#)

## Permission Hierarchy Concept

Before service construction, the Agent determines all knowledge bases that can be referenced at this time through query metadata at different levels. The permission hierarchy reference order is as follows:

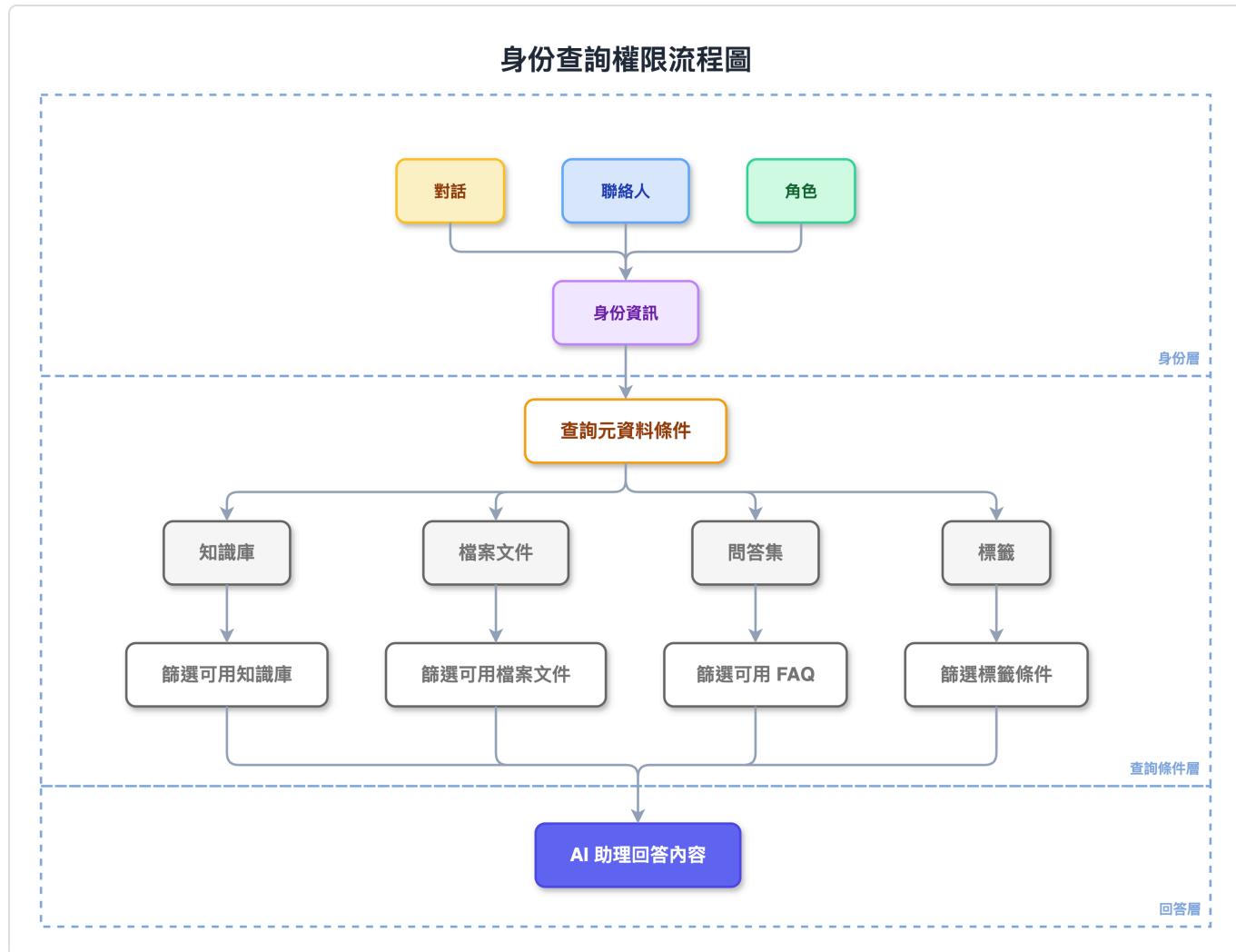
AI Assistant > Conversation Platform > User (Conversation Contact Role) > Query Metadata > Query Permissions

You can specify permissions at each level using a graphical interface or JSON format

Refer to the following documents for operations:

[Getting Started—Using the "Query Builder"](#)

Technical Personnel Manual: [JSON Interface Configuration Guide \(Contact, Web Chat Embed Settings\)](#)



Contacts

Roles are identity containers

Conversations correspond to internal dialogue scenarios where filtering can be used to control the knowledge bases utilized

Query metadata is the "collection of filter conditions" actually executed during conversation

## Document Filter Condition Judgment Hierarchy

## 文件篩選條件判斷層級

權限層級系統



### 權限判斷流程

- 1 首先檢查 Message 層級
- 2 接著查看 Contact 個人權限
- 3 然後確認 Role 角色權限
- 4 最後採用對話平台 Default 預設值

### 實際案例：客服人員小明查詢資料

Message: 無特別設定 ↓  
Contact: 小明的個人權限（可看客服知識庫）↓  
Role: 客服角色（可看客服標籤文件）↓  
Default: 對話平台預設設定

最終結果 = 上層設定優先覆蓋下層

Through layer-by-layer transmission, query metadata becomes the actual decision-making basis for AI response logic

## Practical Application Scenarios

## 企業知識庫架構：如何管理不同部門的資料存取權限

以一間公司為例，展示如何透過標籤管理不同員工的資料存取權限



## Summary: The Value of Query Metadata for Enterprises

- 🎯 **Multi-dimensional Identity Cross-Control** (Role + Region + Product Line)
- 🎯 **Real-time Query Control:** No need to duplicate assistants; simply change conditions to adapt to scenario switches
- 🎯 **Flexible Large-scale Knowledge Base Management:** Tags and knowledge bases can be split and authorized according to scenarios

It is recommended to incorporate query metadata as a core part of your product architecture, enabling enterprises to achieve maximum authorization flexibility with minimal configuration,

ensuring knowledge security while improving conversation experience and operational efficiency.

# Getting Started—Using the "Query Builder"

## Contact Query Metadata Configuration

You can use the "Query Builder" in the MaiAgent service to graphically create query metadata. Here's an example of creating contact query metadata:

### Step 1: Enter the Contacts Area in the MaiAgent Backend Service



Contacts Area Entry

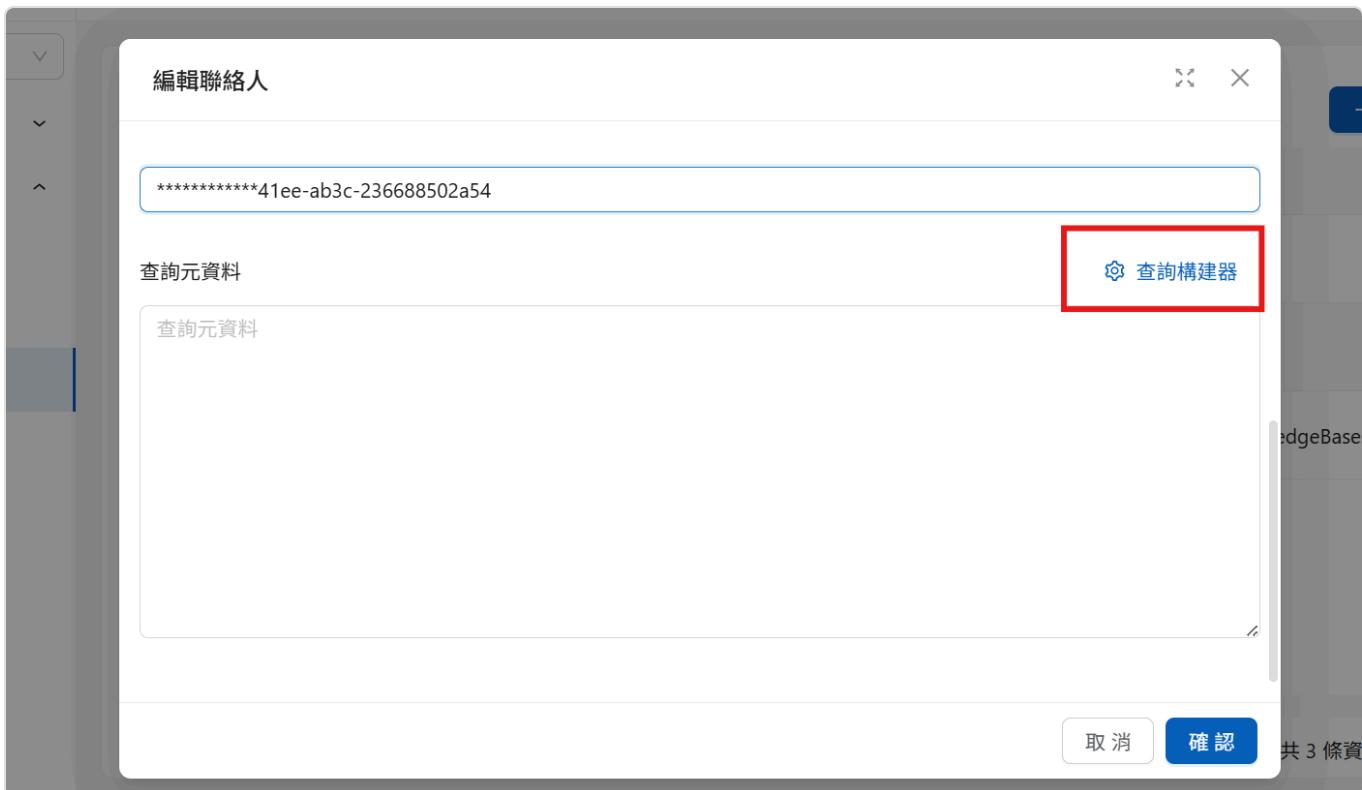
### Step 2: Configure the Desired Contact

Find the contact that needs configuration and click Edit

對話平台	來源ID	查詢元	操作
claude 助理	6d41b9a9...		
claude 助理	-		
第一次嘗試	6d41b9a9...	{ "knowledgeBases": [] }	

Contact Edit Entry

After clicking, the following screen will appear



Query Builder Entry

Click the Query Builder directly to enter the graphical interface

### Step 3: Select the Permissions You Want to Grant

Check the knowledge bases you want to grant access to, or optionally select specific documents within that knowledge base



## Select Knowledge Bases and Documents

If you want to grant access to documents with specific tags, click "Show Tag Filter" to open the tag configuration space



## Tag Filter Configuration

Here you can select the criteria you want to create, choosing **"OR"** (meets any condition) or **"AND"** (meets all conditions) as the document access standard within the granted knowledge bases

## Message Configuration

You can also use the right-side menu shown below to select the knowledge permissions you want to grant:

顯示標籤過濾

全選所有文件

搜尋文件名稱，或標籤

文件 (3)

已選擇 3 個文件 [清除選擇](#)▼ 第一次嘗試的... (1個檔案) 已選擇 1/1 [取消全選此庫](#) SOP\_revised\_01082025.docx

碩士

▼ claude 助理的... (2個檔案) 已選擇 2/2 [取消全選此庫](#) CV\_revised\_01082025.docx

碩士

 @Cosme 2.0 問卷 (回覆) - 表單回應 1.csv

大學



已選擇 3 個參考文件

請輸入您想問的問題

傳送



Internal Conversation: Select Available Knowledge Permissions

You can also use "Show Tag Filter" to configure tag filtering conditions

Before sending each different message, you can still modify the right-side permissions for knowledge management

claude 助理 ✓

2025-08-08 12:40:12

請告訴我的 SOP 寫的如何，跟 CV 搭配著看

2025-08-08 12:40:42

claude 助理

已使用知識庫  
根據你的SOP和CV，我來給你一個綜合評估：

**整體優勢：**

**1. 經驗豐富且有邏輯性**

- SOP的三段式架構（自我探索→實務經驗→目標設定）清晰
- CV展現了從frontend開發→商業分析→AI顧問的完整學習路徑
- 學術表現優秀（GPA 4.0/4.3，班排前5%）

**2. 技能能力與實務經驗並重**

- 有具體的技術專案經驗（Bricks、Vue.js、React.js）
- 兩段實習經驗展現不同面向的能力
- 畢業專案聚焦在LLM領域，與AI申請目標一致

需要改進的地方：

**1. SOP結構問題**

已選擇 3 個參考文件

文件 (3) 已選擇 3 個文件 取消全選此庫

第一次嘗試的... (1個檔案) 已選擇 1/1 取消全選此庫

SOP\_revised\_01082025.docx 碩士

claude 助理的... (2個檔案) 已選擇 2/2 取消全選此庫

CV\_revised\_01082025.docx 碩士

@Cosme 2.0 問卷 (回覆) - 表單回應 1.csv 大學

## Available Documents List

“ 引用

SOP\_revised\_01082025.docx CV\_revised\_01082025.docx @Cosme 2.0 問卷 (回...) 引用節點

2025-08-08 12:41:07

## Selected Documents Status

Currently able to reference three files: CV, SOP, and Survey

After unchecking CV in the next message and sending again:

The screenshot shows a MaiAgent conversation window. The left side displays a message from 'claude 助理' asking for feedback on CV and SOP documents. The right side shows a citation library sidebar with three selected files: '@Cosme 2.0 問卷 (回...) - 表單回應 1.csv' (大學), 'CV\_revised\_01082025.docx' (碩士), and 'SOP\_revised\_01082025.docx' (碩士). A message at the bottom of the sidebar says '請告訴我我的 CV 和 SOP 怎麼樣'.

Example of Unchecking Document

The Agent will no longer be able to use the CV file, and the citation library will not display CV citations:

This screenshot shows the same MaiAgent interface as above, but the citation library sidebar now only lists the 'SOP\_revised\_01082025.docx' file, indicating that the CV file has been removed.

Citation Library Change: After Removing CV

Permissions can be adjusted before sending each message, affecting the content that can be cited in that round's response.

## Pre-configuration When Loading Web Chat

MaiAgent provides the ability to pre-configure query metadata before Web Chat formally initializes. If you want to restrict conversation content before contact (e.g., when providing Web Chat services to customers without registered contact accounts), you can provide query metadata during embedding, and the system will enable message-level knowledge base document filtering mechanism by default.

For Web Chat configuration, please refer to: [Technical Manual: Getting Started—Using JSON Format](#)

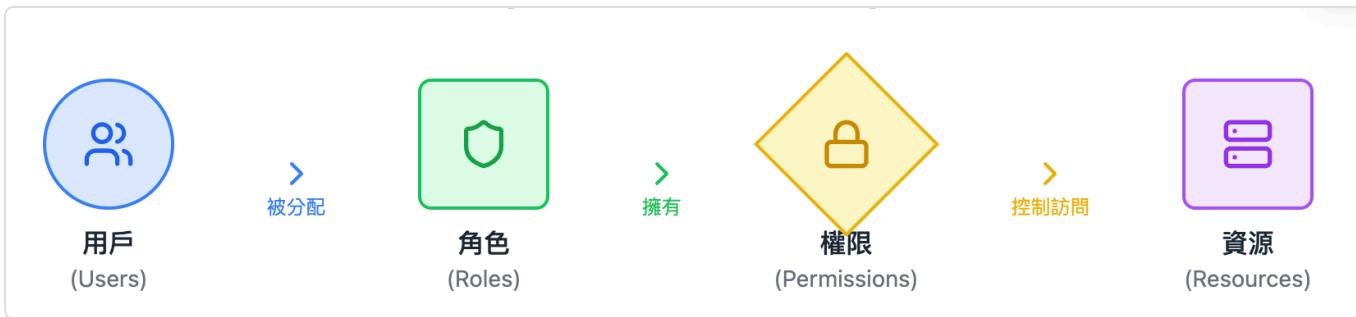
You can also use JSON format to construct query metadata, please refer to [Technical Manual: Getting Started—Using JSON Format](#)

# Organization and Permission Management

## Feature Overview

This system is based on RBAC design and provides a complete organizational management solution, enabling enterprises to effectively organize teams, assign permissions, and monitor resource usage. Through a hierarchical structural design, you can easily create and manage multiple roles while ensuring proper permission control and resource allocation.

Only members under your organization can view and manage all AI assistant-related functions under that organization.



Roles are the core unit for defining permissions and resource allocation. Organization owners can set dedicated functional permissions and resource quotas for each role according to different team needs, achieving refined management.

Member Type	Description	Permission Scope
Owner	Defaults to the organization creator	Has organization settings permissions in the management console Can assign organization settings permissions to others
Regular Member	Members within a role	Has the permissions and resources of their assigned role, such as internal Q&A, conversation permissions, etc.

## Hierarchical Structure

**Clear Hierarchy:** Organization → Role → Member

**Flexible Permissions:** Can be individually configured according to role requirements

**Centralized Management:** Organization owner manages all settings uniformly

**Member Flexibility:** Can participate in different projects or teams across roles

## 創建角色示例

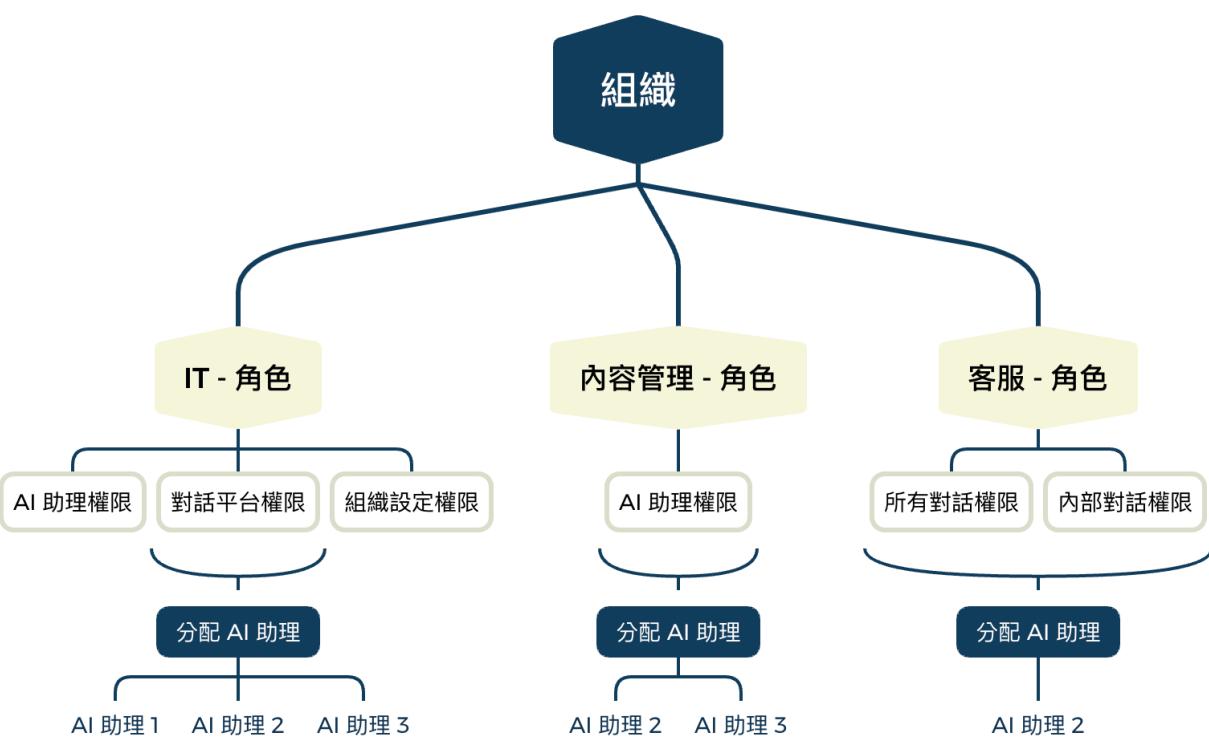


## Creating an Organization

Any account user can create a new organization

The organization creator automatically becomes the owner of that organization

Each organization has an independent management space



# Organization Owner Responsibilities

## Member Management

Add new members to the organization via Email and assign them to roles

Remove members from roles

## Role Management

Those with organization settings permissions can manage role settings and assign permissions to each role.

After completing role creation, members can be added to the role, and members will inherit the permissions and resources belonging to that role.

## Permission Management

Set the following permissions for roles:

AI assistant permissions

All Q&A permissions

Internal Q&A permissions

Conversation platform permissions

Organization settings permissions

## Resource Allocation

Allocate available resources for roles:



## "Role" Characteristics

Roles are functional units within the organization, with freely configurable member composition

Members assigned to roles can come from any members within the organization

A member can simultaneously inherit multiple roles, enabling flexible permission management

Each role has independent permission settings, facilitating needs in different scenarios

## Design Advantages

This design allows you to:

Make the internal organizational structure clearer  
Facilitate management of permission needs for different teams  
Provide real-time insight into organizational operations  
Ensure effective management of resource usage

# Organization and Member Settings

Navigate to "**Organization Conversation**" in the left function area to view the default organization's information, including "**AI Assistant count, monthly conversation text volume, monthly conversation count, and knowledge base capacity used**" under this organization.

AI Assistant count

Monthly conversation text volume

Monthly conversation count

Knowledge base capacity used

The screenshot shows the MaiAgent platform interface. On the left, there is a sidebar with various menu items: AI 功能 (AI Features), AI 助理 (AI Assistant), 工具 (Tools), 客服對話 (Customer Service Chat), 所有對話 (All Conversations), 對話平台 (Conversation Platform), and 内部問答 (Internal Q&A). The '組織設定' (Organization Settings) item is currently selected and highlighted in blue. The main content area is titled 'Examples 的組織' (Organization of Examples). It displays four key metrics: '目前 AI 助理數目' (Number of current AI assistants) is 36; '本月份對話文字數量' (Total conversation text volume for this month) is 326,527 / 5,000,000, with a note '已使用 7%' (Used 7%); '本月對話數量' (Number of conversations this month) is 177; and '已使用的知識庫容量' (Used knowledge base capacity) is 62.31 MB / 100 GB, with a note '已使用 0%' (Used 0%). The top right corner of the main area shows '專業版' (Professional Edition), the date '2026-01-01', and a note '250 天後到期' (Expires after 250 days). The top right of the entire window has icons for search, refresh, and help, along with the 'MaiAgent 客服' (MaiAgent Customer Service) and 'Examples...' buttons.

## 1. Create New Organization

You can create additional organizations by clicking the dropdown menu in the upper right corner of your account and selecting "**Create Organization**".

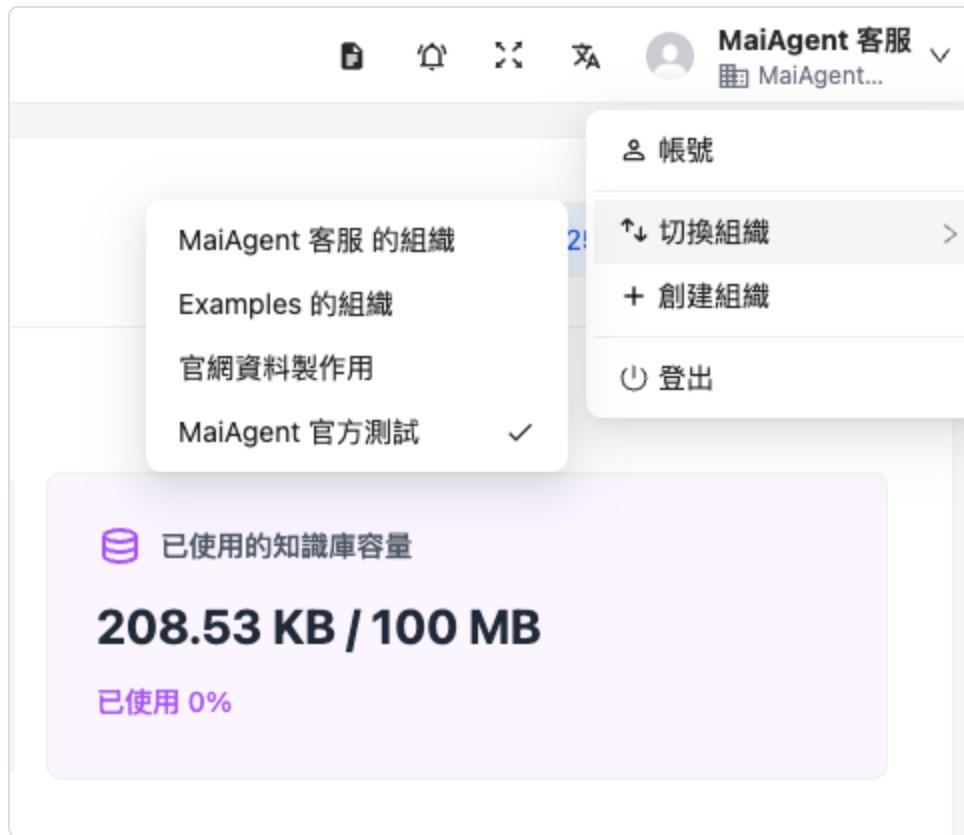


Enter the organization name and click the "**Confirm**" button.

A screenshot of a modal dialog box titled "新增組織". It contains a single input field labeled "\* 名稱" with the placeholder "請輸入". At the bottom right are two buttons: "取消" (Cancel) and a blue "確認" (Confirm) button.

## 2. Switch Organizations

When you have multiple organizations, click the dropdown arrow in the upper right corner of your account and select "**Switch Organization**" to switch to other organizations.



### 3. Edit Organization Members

Within the organization, you can click "**Edit Members**" to add existing MaiAgent user emails to the organization.

**MaiAgent**

組織設定 / 組織名稱

- AI 功能
- AI 助理
- 工具
- 客服對話
- 所有對話
- 對話平台
- 內部問答
- 組織設定**

**MaiAgent 官方測試**

**編輯成員** **編輯角色權限**

**目前 AI 助理數目**  
**1/1**

MAIAGENT

組織設定 / 成員

的組織

AI 功能

AI 助理

知識庫

工具

聯絡人

客服對話

所有對話

對話平台

聯絡人

內部問答

**組織設定**

返回組織 請輸入成員名稱、ID 或 Email 重置篩選

ID	成員	Email	權限	操作
4ed48a66-9d03-42a3-bf52-978ece6222f0			新增組織成員 + 新增成員 組織權限, 問答權限, 對話權限, AI 助理權限, 平臺權限 查看成員權限	刪除成員

共 1 筆資料 10 條/頁

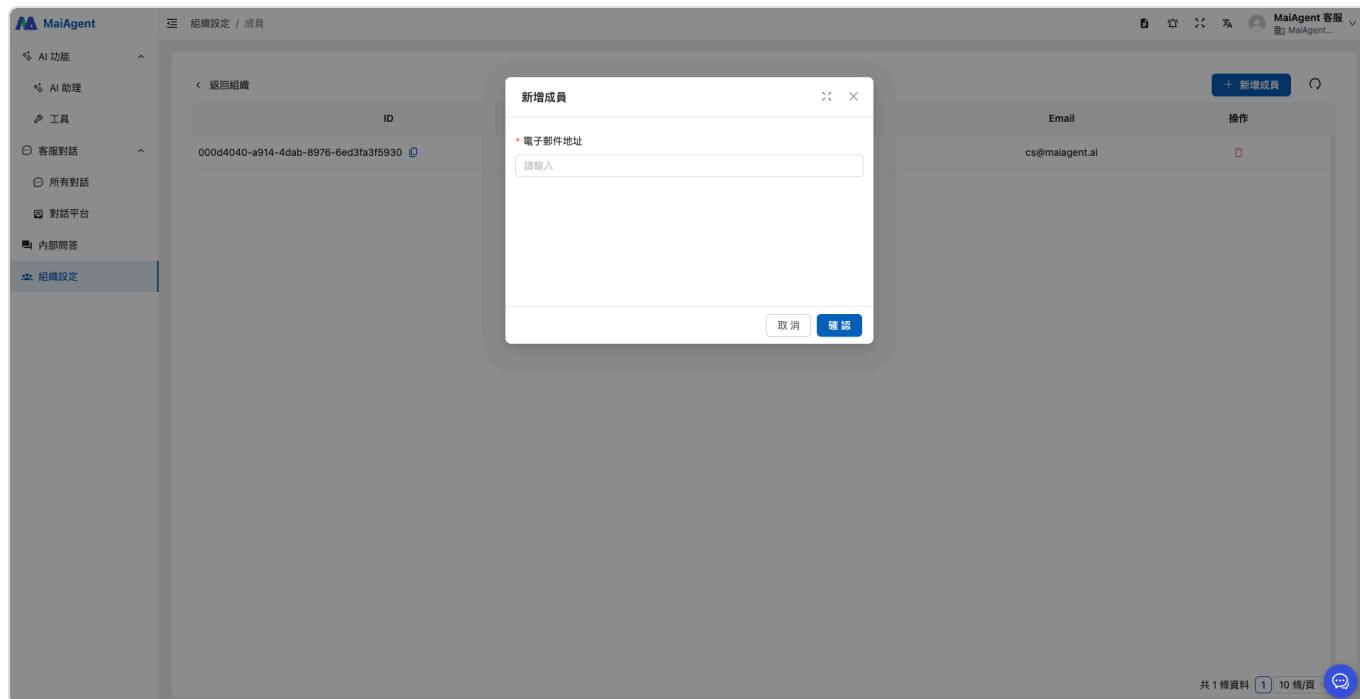
Edit Members page

Click "**Add Member**" and enter the user's email to add them to the organization. You can also use the "**Delete**" button to remove members.

## 4. Add or Remove Members

Click "**Add Member**" and enter the user's email to add them to the organization. You can also use the "**Delete**" button to remove members.

The user you wish to invite must have a MaiAgent account to be added as an organization member.



After adding members, you can assign each member a role you define and grant them predefined permissions based on their role.

# Role Permission Management

## Edit Role Permissions

Within the organization, you can configure permissions for members who are already part of the group by clicking "**Edit Role Permissions**".

Within the organization, you can set permissions for members of the group by clicking "**Edit Role Permissions**".

The screenshot shows the MaiAgent platform interface. On the left, there is a sidebar with the following menu items:

- AI 功能
- AI 助理
- 工具
- 客服對話
- 所有對話
- 對話平台
- 內部問答
- 組織設定

The main content area has a title "MaiAgent 官方測試" with a refresh icon. Below it are two buttons: "編輯成員" (Edit Member) and "編輯角色權限" (Edit Role Permissions). A light blue box displays the message "目前 AI 助理數目 1/1".

On the role permissions page, you can:

**Add Role:** Create role groups for the organization (e.g., Marketing Department). When new members join, applying the role automatically grants corresponding permissions

**Edit Role:** Modify role name, description, or department affiliation and other basic information

**Assign Role Permissions:** Configure functional modules and operational scope available to the role

**Assign Members:** Add organization members to specified roles for unified permission management

**Assign AI Assistants:** Allocate AI assistants that the role can operate, covering corresponding dialogue platforms, internal Q&A, and AI settings

**Delete Role:** Remove roles no longer in use to maintain a clean organizational permission structure

ID	名稱	權限	建立時間	操作
4658552b-e485-4b0c-acb9-6003204a0729	預設角色 <a href="#">預設角色</a>	內部問答權限	2025-08-04 17:28:27	<a href="#">編輯</a> <a href="#">刪除</a>
8efaf1b36-534b-4ff3-b1ae-b426ea1a50fe	助理	對話平台權限	2025-08-06 15:08:46	<a href="#">編輯</a> <a href="#">刪除</a>
ca259256-a715-44fa-b362-a7892be0b94a	member	AI 助理權限	2025-09-04 12:43:16	<a href="#">編輯</a> <a href="#">刪除</a>
ad412ad9-2b46-430e-b723-c110b5bdd7f5	admin	AI 助理權限, 所有對話權限, 組織設定權限, 內部問答權限, ...	2025-09-04 12:42:44	<a href="#">編輯</a> <a href="#">刪除</a>

Role Permission Configuration Diagram

## Permission Levels

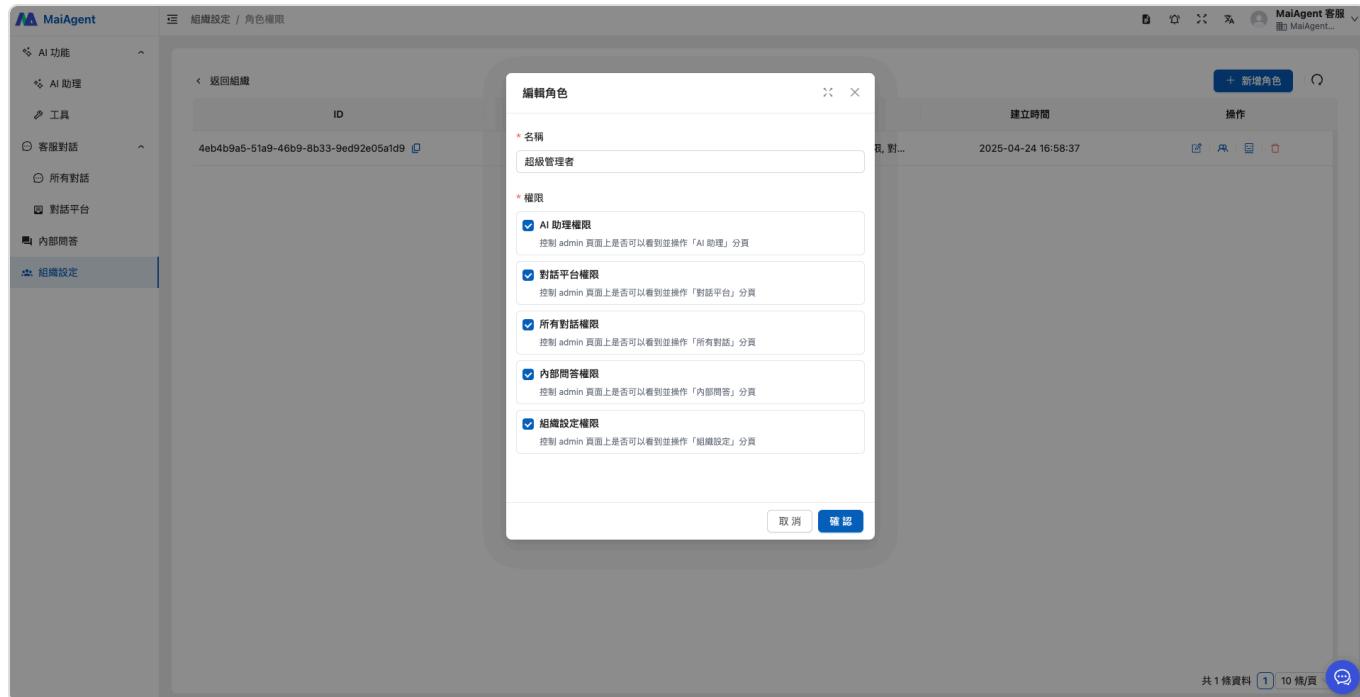
MaiAgent provides the following permission categories:

Permission Name	Permission Description
AI Assistant Permissions	Controls whether the "AI Assistant" tab can be viewed and operated on the page
Dialogue Platform Permissions	Controls whether the "Dialogue Platform" tab can be viewed and operated on the page
All Conversations Permissions	Controls whether the "All Conversations" tab can be viewed and operated on the page
Internal Q&A Permissions	Controls whether the "Internal Q&A" tab can be viewed and operated on the page
Organization Settings Permissions	Controls whether the "Organization Settings" tab can be viewed and operated on the page

# Permission Configuration Instructions

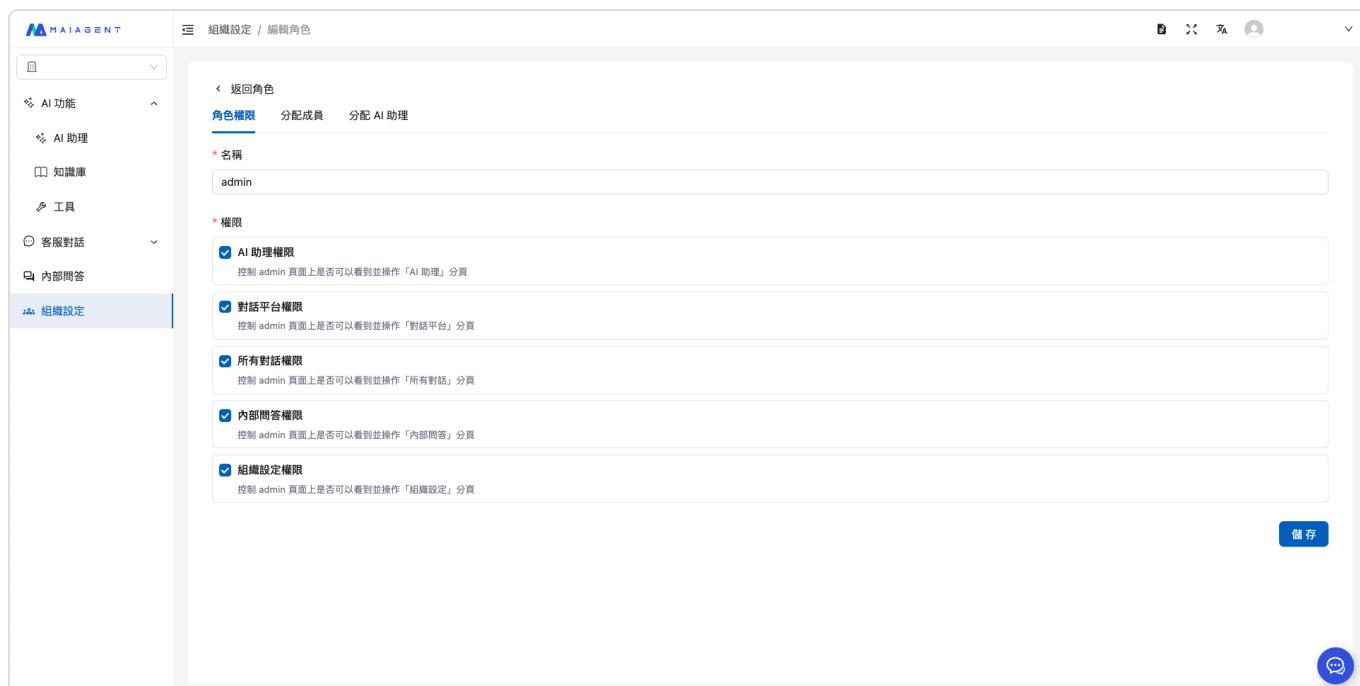
## Add Role and Assign Permissions

Click "**Add Role**" in the upper right corner to enter the new role name and check the permissions that the role can have.



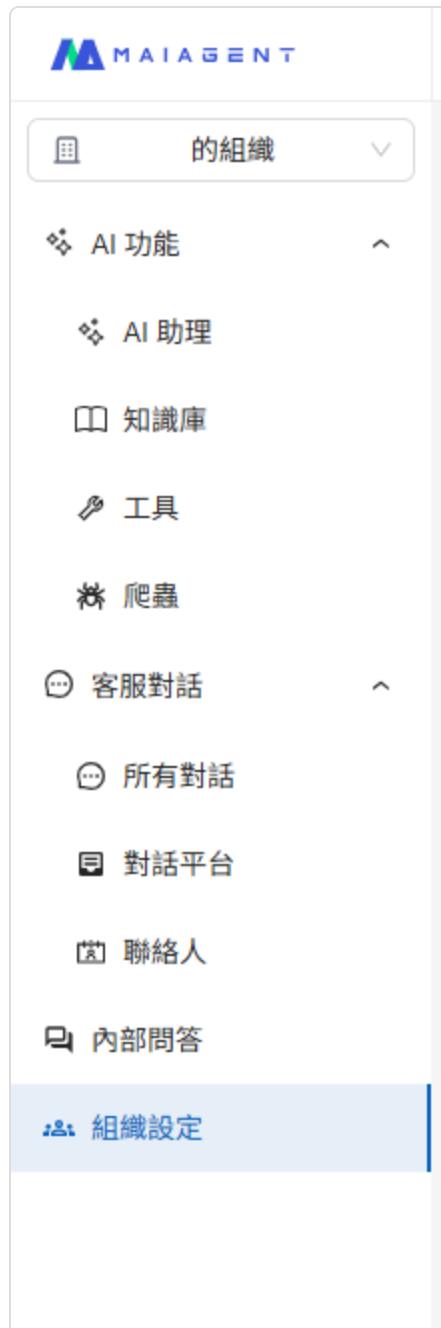
## Edit Name and Permissions

Enter the edit page to modify the role name and reselect the permissions that the role can have.



In the edit page, the second tab "**Assign Members**" allows you to add members you want to assign to the role and remove members.

You can determine whether organization members can view or use related functional tabs in the left menu based on role definitions. Enable/disable various permissions through checkboxes, and click the "**Save**" button in the lower right corner to apply settings.



Left Menu Page

Role Permission Configuration Page

## How to Use Different Permission Assignments

Suppose a company uses MaiAgent to set up a customer service system:

### Scenario 1: New Customer Service Specialist

Only grant "**Internal Q&A Permissions**"

**Reason:** As they are newly hired, they need to quickly learn product knowledge and company policies

**Problem Prevention:** Prevent customer service specialists from accidentally deleting customer conversation records or modifying important AI assistant settings while unfamiliar

### Scenario 2: Senior Customer Service

"Internal Q&A Permissions" + "All Conversations Permissions"

**Reason:** Experienced, needs to assist with handling complex customer complaints and guiding newcomers

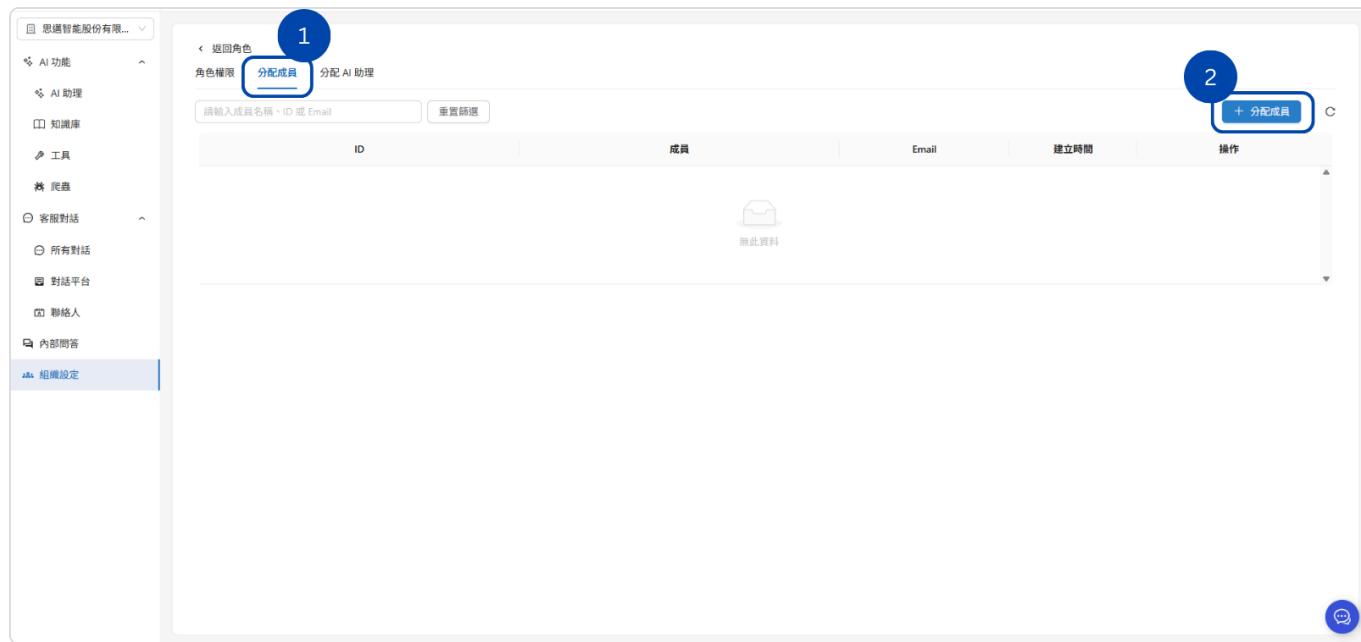
**Problem Prevention:** Still do not grant AI assistant permissions to avoid customer service personnel mistakenly changing AI assistant settings, causing all customers to receive incorrect responses

## Assign Members

You can assign created roles to members in your organization:

Enter the Assign Members page

Click the "+Assign Members" button



Select members to add, click the central "Add >" button

Finally click the "Confirm" button in the lower right corner to complete the setup

## 分配成員

X X

### 可選成員

共 12 項

搜尋可選成員

選擇全部

已選 0 項

:@maiagent.ai

王思邁  
maiagent.wang@maiagent.ai

@maiagent.ai

@maiagent.ai

!@maiagent.ai

!@maiagent.ai

1 2 >

### 已選成員

共 0 項

搜尋已選成員

選擇全部

已選 0 項

暫無數據

加入 >

< 移除

取消

確認

Select members to add

## 分配成員

X X

### 可選成員

共 12 項

搜尋可選成員

選擇全部

已選 0 項



@maiagent.ai



王思邁

maiagent.wang@maiagent.ai



maiagent.ai



@maiagent.ai



maiagent.ai



@maiagent.ai

加入 >

< 移除

### 已選成員

共 0 項

搜尋已選成員

選擇全部

已選 0 項

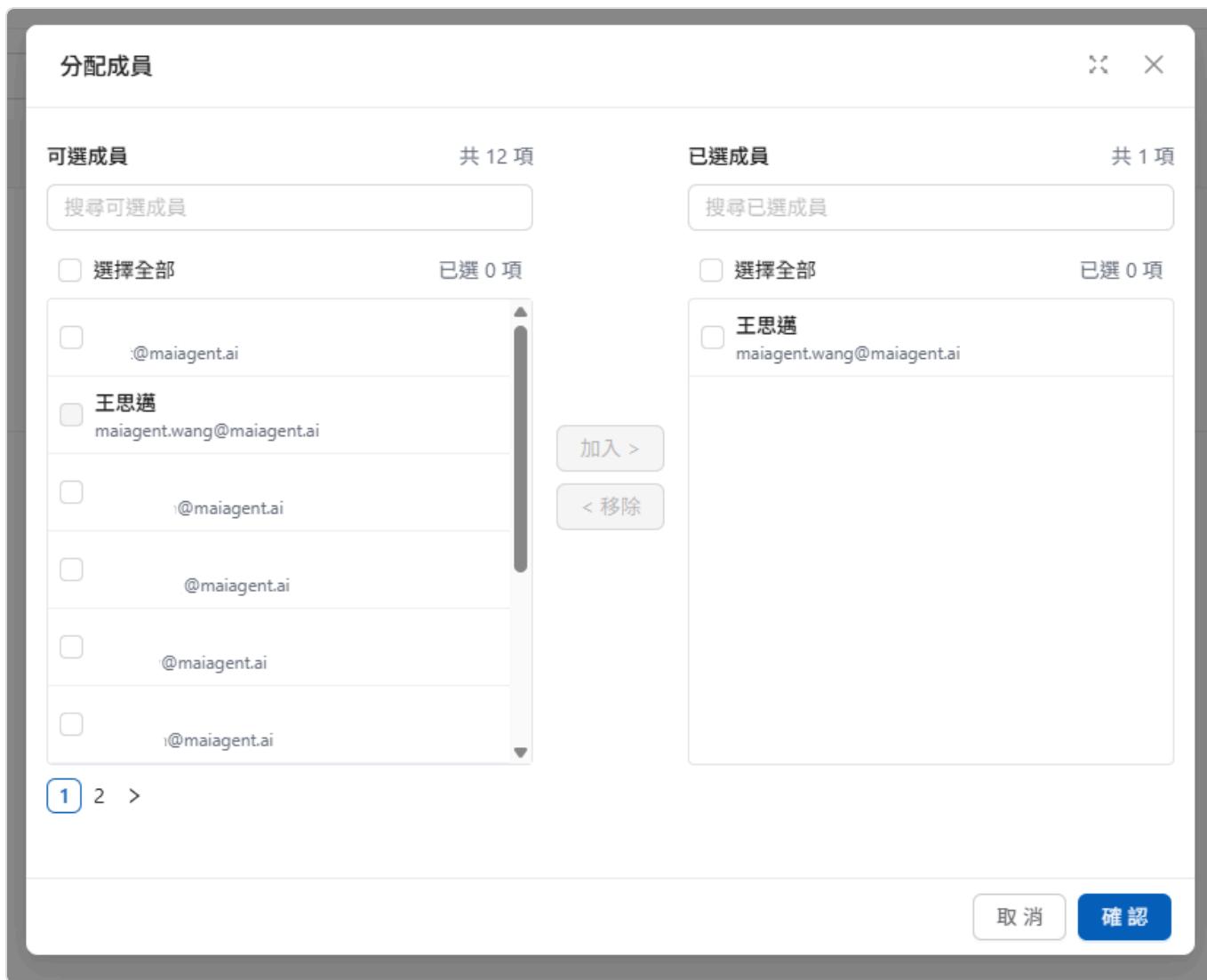
暫無數據

1 2 >

取消

確認

Click Add



Addition complete, click Confirm

The newly added members will appear in the member list

思邁智能股份有限公司

AI 功能

AI 助理

知識庫

工具

爬蟲

客服對話

所有對話

對話平台

聯絡人

內部問答

組織設定

返回角色

角色權限 分配成員 分配 AI 助理

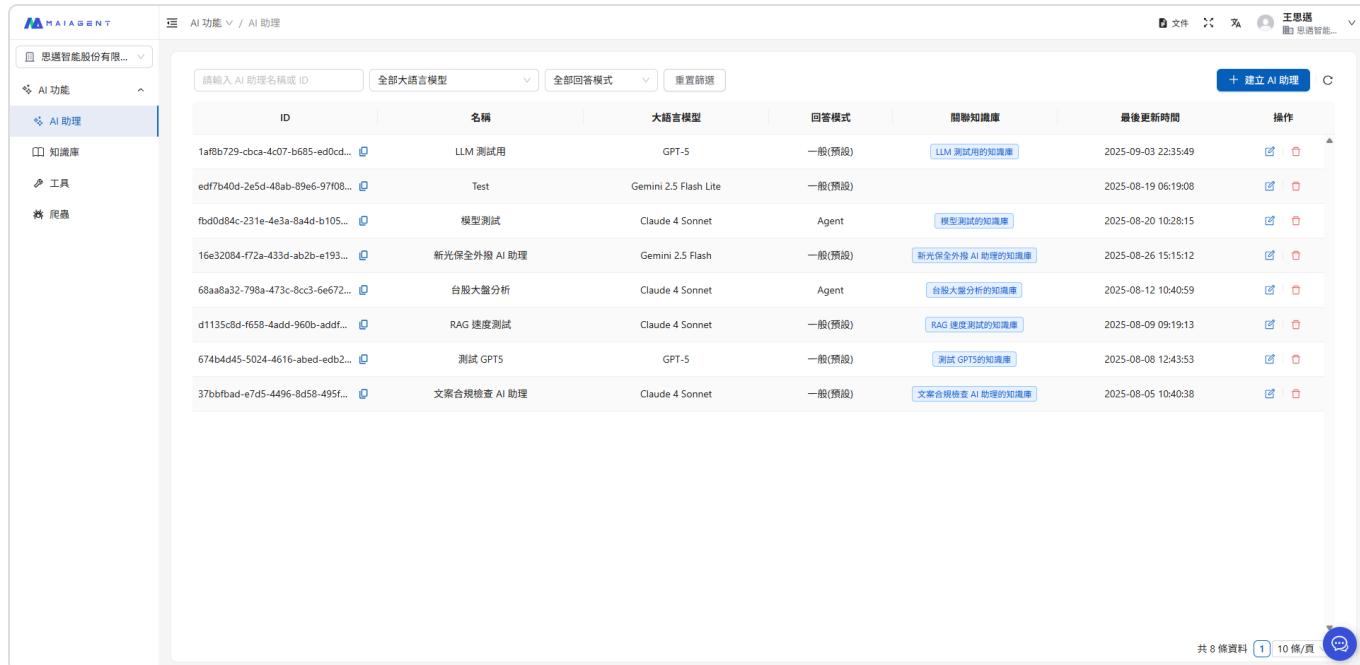
請輸入成員名稱、ID 或 Email 重置篩選

+ 分配成員

ID	成員	Email	建立時間	操作
1d6826cb-26f8-4df6-844b-180400026ffb	王思邁	maiagent.wang@maiagent.ai	2025-09-04 14:39:15	

共 1 筆資料 10 條/頁

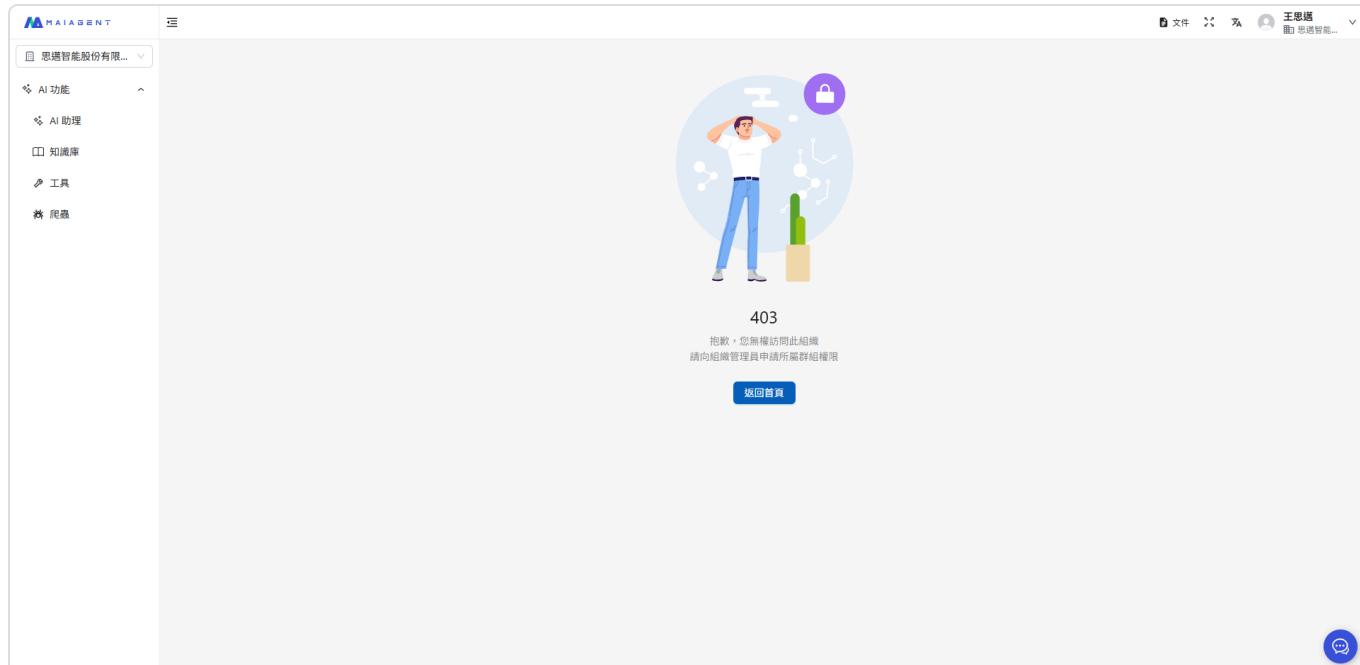
After joining, since members only have AI assistant permissions, the left menu will only display the AI assistant function menu. Other functions such as customer service conversations and organization settings will not be displayed in the left list. When members enter functions they do not have permission to access, a no-permission notification screen will appear:



The screenshot shows the 'AI 助理' (AI Assistant) section of the MAIAgent interface. On the left, there's a sidebar with 'AI 功能' (AI Functions) selected. The main area displays a table of AI models with columns: ID, 名稱 (Name), 大語言模型 (Large Language Model), 回答模式 (Response Mode), 管聯知識庫 (Knowledge Base), 最後更新時間 (Last Update Time), and 操作 (Actions). The table contains 8 rows of data.

ID	名稱	大語言模型	回答模式	管聯知識庫	最後更新時間	操作
1af8b729-cbca-4c07-b685-ed0cd...	LLM 測試用	GPT-5	一般(預設)	LLM 測試用的知識庫	2025-09-03 22:35:49	
edf7b40d-2e5d-48ab-89e6-97f08...	Test	Gemini 2.5 Flash Lite	一般(預設)		2025-08-19 06:19:08	
fb00d84c-231e-4e3a-8a4d-b105...	模型測試	Claude 4 Sonnet	Agent	模型測試的知識庫	2025-08-20 10:28:15	
16e32084-f72a-433d-ab2b-e193...	新光保全外撥 AI 助理	Gemini 2.5 Flash	一般(預設)	新光保全外撥 AI 助理的知識庫	2025-08-26 15:15:12	
68aa8a32-798a-473c-8cc3-6e672...	台股大盤分析	Claude 4 Sonnet	Agent	台股大盤分析的知識庫	2025-08-12 10:40:59	
d1135c8d-f658-4add-960b-addf...	RAG 速度測試	Claude 4 Sonnet	一般(預設)	RAG 速度測試的知識庫	2025-08-09 09:19:13	
674b4d45-5024-4616-abed-edb2...	測試 GPT5	GPT-5	一般(預設)	測試 GPT5 的知識庫	2025-08-08 12:43:53	
37bbfbad-e7d5-4496-8d58-495f...	文案合規檢查 AI 助理	Claude 4 Sonnet	一般(預設)	文案合規檢查 AI 助理的知識庫	2025-08-05 10:40:38	

### Updated Permission Page



The screenshot shows the updated permission page. The left sidebar still shows 'AI 功能' selected. The main area features a large circular icon with a character holding a lock, indicating restricted access. Below the icon, the number '403' is displayed, followed by the message '抱歉，您無權訪問此組織 請向組織管理員申請所屬群組權限'. A blue button labeled '返回首頁' (Return to Home) is at the bottom.

### No Permission Notification Screen

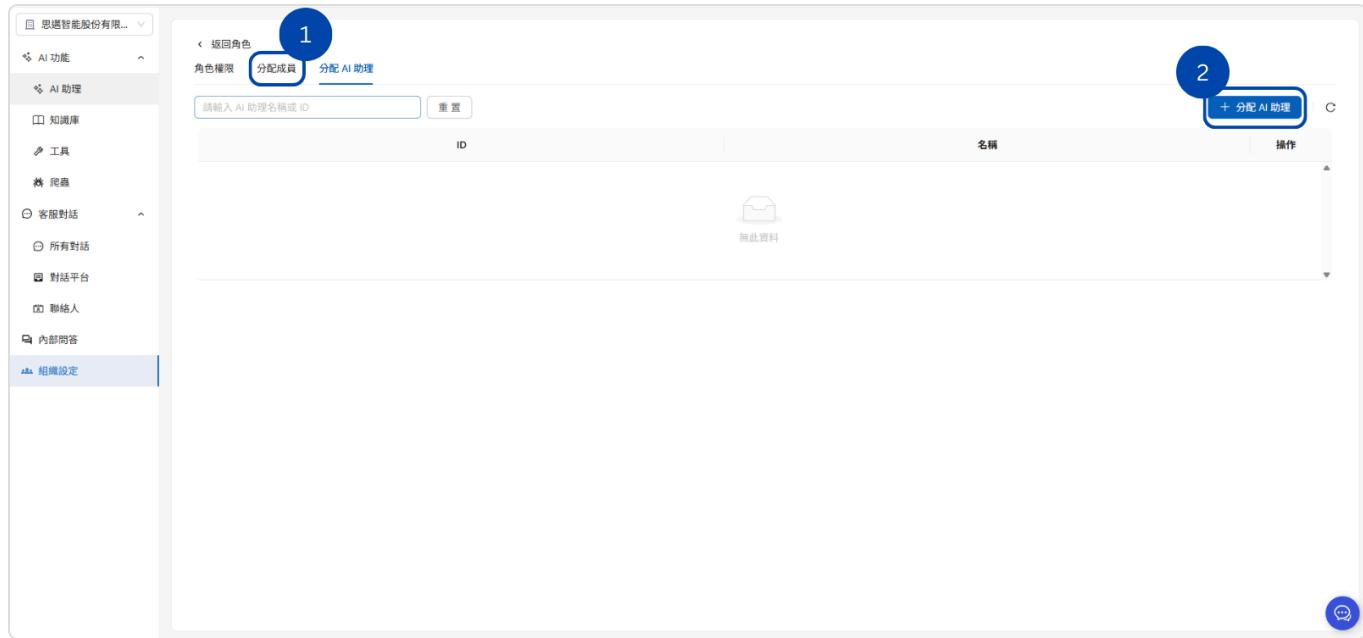
This way, the member can only use the AI assistant function and cannot make other changes.

# Assign AI Assistants

You can restrict AI assistants that roles can use, ensuring knowledge base data is truly separated by role permissions:

Enter the "[Assign AI Assistants](#)" page

Click the "[+Assign AI Assistants](#)" button



Select AI assistants to add, click the central "Add >" button

Finally click the "[Confirm](#)" button in the lower right corner to complete the setup

## 分配 AI 助理

X X

### 可選 AI 助理

共 10 項

搜尋可選 AI 助理

全選

已選 0 項

LLM 測試用

1af8b729-cbca-4c07-b685-ed0cd38560

LINE CONVERGE

450437b7-3812-4827-be46-c4c78a0a07

Test

edf7b40d-2e5d-48ab-89e6-97f08651f3

模型測試

fbfd0d84c-231e-4e3a-8a4d-b1052db9b5

POC Agent

4d224392-25aa-4482-9ab0-3c66f612391

16e32084-f72a-433d-ab2b-e193272a2e

1 2 >

### 已選 AI 助理

共 0 項

搜尋已選 AI 助理

全選

已選 0 項

暫無資料

新增 AI 助理 >

< 移除 AI 助理

取消

確認

Select AI assistants to add

## 分配 AI 助理

X X

### 可選 AI 助理

共 10 項

搜尋可選 AI 助理

全選

已選 2 項

#### LLM 測試用

1af8b729-cbca-4c07-b685-ed0cd38560

#### LINE CONVERGE

450437b7-3812-4827-be46-c4c78a0a07

#### Test

edf7b40d-2e5d-48ab-89e6-97f08651f3

#### 模型測試

fb0d84c-231e-4e3a-8a4d-b1052db9b5

#### POC Agent

4d224392-25aa-4482-9ab0-3c66f61239

#### 

16e32084-f72a-433d-ab2b-e193272a2e

1 2 >

### 已選 AI 助理

共 0 項

搜尋已選 AI 助理

全選

已選 0 項

暫無資料

新增 AI 助理 >

< 移除 AI 助理

取消

確認

Click the central Add AI Assistant button

## 分配 AI 助理

X X

### 可選 AI 助理

共 10 項

搜尋可選 AI 助理

全選

已選 0 項

LLM 測試用

1af8b729-cbca-4c07-b685-ed0cd3856c

LINE CONVERGE

450437b7-3812-4827-be46-c4c78a0a07f

Test

edf7b40d-2e5d-48ab-89e6-97f08651f3

模型測試

fb0d0d84c-231e-4e3a-8a4d-b1052db9b5

POC Agent

4d224392-25aa-4482-9ab0-3c66f61239

16e32084-f72a-433d-ab2b-e193272a2e

新增 AI 助理 >

< 移除 AI 助理

### 已選 AI 助理

共 2 項

搜尋已選 AI 助理

全選

已選 0 項

LLM 測試用

1af8b729-cbca-4c07-b685-ed0cd3856c

全螢幕嵌入示範

da10bf5e-b8c8-4cac-85cf-dc265aeac6

取消

確認

Addition complete, click Confirm

After adding, the AI assistants you just selected will appear in the list:

The screenshot shows the '分配 AI 助理' (Assign AI Assistant) section of the MAIAgent platform. It lists two assigned assistants:

ID	名稱	操作
ec5843e1-5128-487b-bfb9-f385a716a4bb	LLM 測試用	
676e0627-0e1a-44aa-958d-154cbb13a40	全螢幕嵌入示範	

At the bottom right, there are buttons for '共 2 條資料' (2 items), '10 條/頁' (10 items/page), and a message icon.

Once completed, users with that role can only view and use the assigned AI assistants:

The screenshot shows the 'AI 功能' (AI Function) section of the MAIAgent platform, specifically the 'AI 助理' (AI Assistant) tab. It lists two assigned assistants:

ID	名稱	大語言模型	回答模式	關聯知識庫	最後更新時間	操作
1af8b729-cbca-4c0...	LLM 測試用	GPT-5	一般(預設)		2025-09-03 22:35:49	
da10bf5e-b8c8-4ca...	全螢幕嵌入示範	Claude 4 Sonnet	Agent		2025-08-27 18:01:48	

At the bottom right, there are buttons for '共 2 條資料' (2 items), '10 條/頁' (10 items/page), and a message icon.

## Default Role

ID	名稱	權限	建立時間	操作
95a1100c-208a-4bb8-bb82-72e6...	預設角色	AI 助理權限	2025-07-29 20:44:04	

The default role is automatically generated when an organization is created and serves as the base role for all users. When applying user role content, if no specific assignment is made, the system will

automatically apply all permission settings within the default role.

It is recommended to set default role permissions to the lowest permission level to prevent other role settings from being overridden by the default role

## Permission Processing

When a user is assigned to multiple roles simultaneously, MaiAgent adopts the following permission processing logic:

### Permission Union Principle

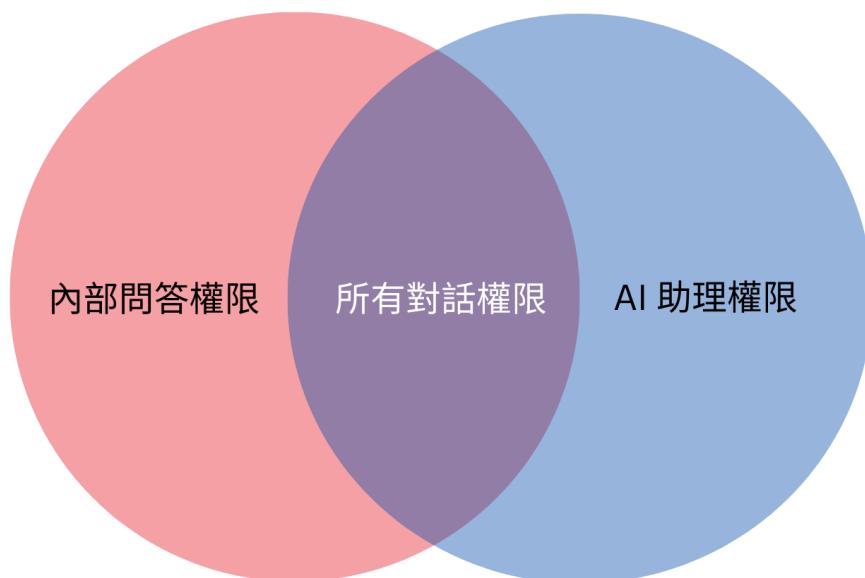
**"Maximum Permission" Strategy:** Users will receive the union of permissions from all roles, possessing the broadest operational permissions.

#### Example:

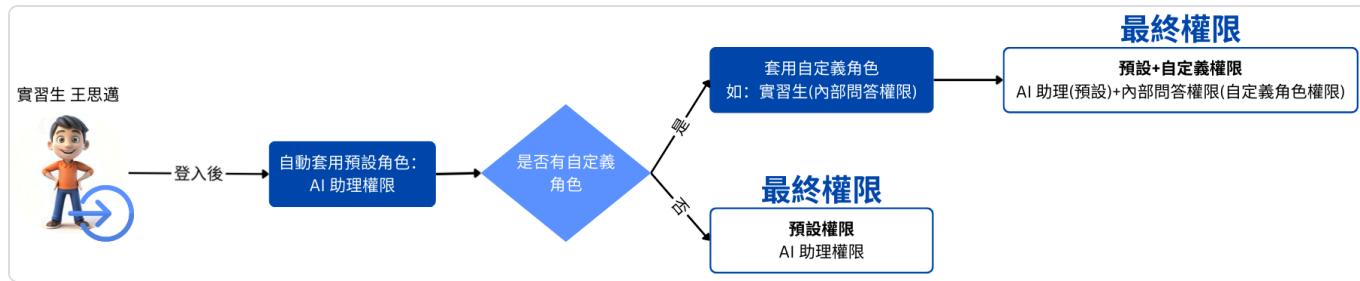
User Chen belongs to both:

- Customer Service Role: Internal Q&A Permissions + All Conversations Permissions
- Marketing Role: AI Assistant Permissions + All Conversations Permissions

→ Chen actually has: Internal Q&A + All Conversations + AI Assistant Permissions  
(i.e., the entire red, blue, and purple areas in the diagram below)



The system will apply permissions in the following order:



### Default Role (automatically assigned)

Automatically generated when the organization is created

All users will automatically have default role permissions applied

### Custom Roles (in assignment order)

Later assigned roles will merge with existing permissions

Will not override existing permissions, only add new ones

## Role Union Example

When the default role is associated with three AI assistants, and your custom role is only associated with two assistants:

The screenshot shows the '分配 AI 助理' (Assign AI Assistant) section of a software interface. On the left, a sidebar lists organizational units like '思邁智能股份有限公司' and various departments. The main area displays a table of assigned assistants:

ID	名稱	操作
a1eedbaa-7e26-40c7-afde-ca2bf29e1b75	LLM 測試用	刪除
0f8a2935-2ad7-4ae6-8499-95f979961e50	全螢幕嵌入示範	刪除
f5146c47-e451-4675-8f32-540614a97338	台股大盤分析	刪除

At the bottom right, there are pagination controls: '共 3 條資料' (3 items), '10 條/頁' (10 items per page), and a message icon.

Default Role

The screenshot shows the '分配 AI 助理' (Assign AI Assistant) section. On the left sidebar, under '組織設定', 'AI 功能' is expanded, showing 'AI 助理'. The main area has tabs for '返回角色', '角色權限', and '分配成員', with '分配 AI 助理' selected. A search bar and a reset button are at the top. Below is a table with columns: ID, 名稱, and 操作. Two rows are listed:

ID	名稱	操作
ec5843e1-5128-487b-bfb9-f385a716a4bb	LLM 測試用	<span style="color:red;">刪除</span>
676e0627-0e1a-44aa-958d-154cbba13a40	全螢幕嵌入示範	<span style="color:red;">刪除</span>

At the bottom right, there are buttons for '共 2 條資料' (2 items), a page size selector (10), and a message icon.

### Custom Role

Even if the user has been assigned to a custom role, they will still have the union including the default role's associated settings, allowing them to use three AI assistants:

The screenshot shows the 'AI 助理' list interface. On the left sidebar, 'AI 功能' is expanded, showing 'AI 助理'. The main area has a search bar and filters for '請輸入 AI 助理名稱或 ID', '全部大語言模型', '全部回答模式', and '重置篩選'. A '建立 AI 助理' button is at the top right. Below is a table with columns: ID, 名稱, 大語言模型, 回答模式, 關聯知識庫, 最後更新時間, and 操作. Three rows are listed:

ID	名稱	大語言模型	回答模式	關聯知識庫	最後更新時間	操作
1af8b729-cbca-4c0...	LLM 測試用	GPT-5	一般(預設)	LLM 測試用的知識庫	2025-09-03 22:35:49	<span style="color:blue;">編輯</span> <span style="color:red;">刪除</span>
da10bf5e-b8c8-4ca...	全螢幕嵌入示範	Claude 4 Sonnet	Agent	營運資料庫	2025-08-27 18:01:48	<span style="color:blue;">編輯</span> <span style="color:red;">刪除</span>
68aa8a32-798a-473...	台股大盤分析	Claude 4 Sonnet	Agent	台股大盤分析的知識庫	2025-08-12 10:40:59	<span style="color:blue;">編輯</span> <span style="color:red;">刪除</span>

At the bottom right, there are buttons for '共 3 條資料' (3 items), a page size selector (10), and a message icon.

## Permission Removal

When a user is removed from a role:

**Remove Custom Role:** Lose that role's exclusive permissions, retain other role permissions

**Cannot Remove Default Role:** All users permanently belong to the default role

**Permission Check:** System recalculates the user's effective permissions

### Example:

Chen's original permissions: Internal Q&A + AI Assistant + Dialogue Platform

## Troubleshooting

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### **Common Issue: User Cannot See Expected Functions or Can Use Functions Beyond Expectations**

Confirm all roles the user belongs to, including whether the default role has granted excessive permissions

Ask the user to clear browser cache and log in again

### **Permission Audit Recommendations**

Regularly review whether user role assignments are reasonable

Remove all role assignments for departed employees

# Differences Between Roles and Contacts

## Display in Conversations

### Contact

MaiAgent creates a contact ID in the synchronized user information storage to identify user conversation information.

Users do not need to log in or have a MaiAgent account to be created.

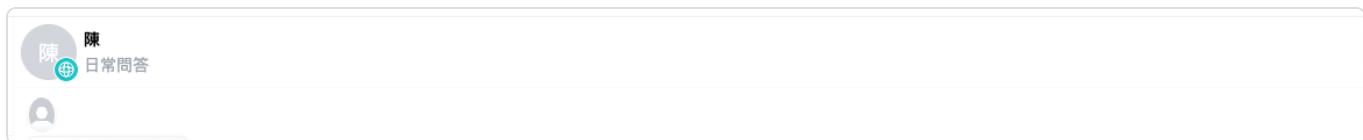
To learn more about contacts, please refer to [Contact](#)



Contact name not set: Users default to anonymous

### Role

To assign a role to a user, that user must have a MaiAgent account and be part of the organization. Enterprises can predefine roles internally, such as: customer service representative, administrative staff, intern, etc. Within the organization, roles can be created in advance with usable permissions and reference databases. Organization members can select roles according to their needs and directly apply the settings.



Role user basic information display

To learn more about contacts, please refer to [Role Permission Management](#)

# Permission Method Comparison



AI assistant embedded view

Comparison Item	Contact	Role
⌚ Use Case	External users, system integration	Internal users, organizational management
👤 MaiAgent Registration	✗ No registration required	✓ Registration and organization membership required
📝 Creation Method	Automatically created by system or manually created	Predefined role templates
🔄 Update Mechanism	Dynamic user information synchronization	Static role permission settings
⌚ Purpose	Identify user conversation information	Apply default permission settings, manage AI assistant backend permissions

Comparison Item	Contact	Role
Target Users	External visitors, members	Internal employees, organization members
Management Method	Managed through API integration	Managed through backend role management
Permission Control	Dynamic control based on Contact ID	Static control based on Role

## Typical Application Scenarios

**Contact Use Cases:** Suitable for scenarios requiring clear role division and permission definition

**Corporate Website:** Visitors receive different product information based on their identity

**Member Center:** Access corresponding service content based on membership level

**Customer Service Center:** Provide differentiated support based on customer type

**Role Use Cases**

**Internal Operations:** Employees handle work according to departmental roles

**Customer Service Team:** Query knowledge base according to scope of responsibility

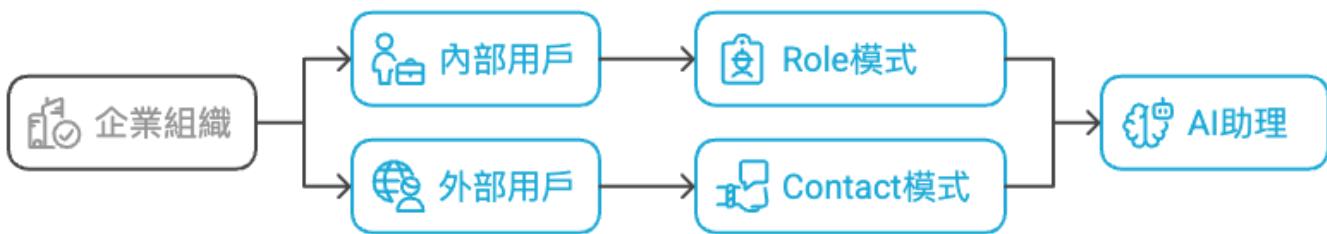
**Management Level:** Conduct content review and maintenance according to permissions

## Comprehensive Usage Strategy

Contact management is suitable for external business (where explicit user identity is not required)

Role management is suitable for internal business (where clear permission division is needed  
multiple members can use the same permissions)

### MaiAgent 權限管理流程



## Use Cases

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### Text Customer Service

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In enterprise customer service work, facing large volumes of frequent customer inquiries, manual responses not only lead to delays but also overburden customer service personnel, affecting overall service efficiency. Many repetitive questions appear repeatedly, consuming significant time to handle, making it difficult for teams to focus their energy on more complex customer needs and problem-solving.

Now, you can use MaiAgent to create an AI text customer service assistant for your enterprise, effectively reducing customer service costs and improving service quality and customer satisfaction!

# Regulatory Query Assistant

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Using the **Legal Regulation Search Assistant** as an example, in the past, government agencies and enterprises were limited by technical constraints and could only use keyword search methods to query data. However, keyword search has the following shortcomings:

Poor semantic understanding, inaccurate results

Unable to ask multiple questions at once

Affected by spelling errors

Unable to integrate answers to multiple questions

The above shortcomings lead to **poor user experience**. However, with the emergence of large language models and RAG, everything has changed. The following is a comparison table between traditional keyword search and RAG search:

	Traditional Keyword Search	RAG Search
Query Understanding	Limited to exact matching and basic synonyms	Understands context, intent, and nuanced meanings
Information Retrieval	Based on keyword frequency and basic relevance algorithms	Uses semantic similarity and context-aware retrieval
Result Format	List of potentially relevant documents	List of potentially relevant documents Synthesized answers citing source documents
Handling Complex Queries	Usually requires multiple searches and manual integration	Can directly handle complex multi-faceted questions
Ability to Adapt to Domain-Specific Terminology	Limited unless heavily customized	Can learn and adapt to organization-specific terminology
Ability to Use Unstructured Data	Very limited	High, can extract insights from various document types
Continuous Learning	Typically static unless manually updated	Can improve over time through usage and feedback

Taking the "Government Legal Regulation Search Assistant" as an example, as shown in the legal regulation announcements from the Ministry of the Interior's National Land Management Agency below, keyword search was used in the past. Now, we hope to improve user convenience through generative AI technology. This can be done on MaiAgent.

<https://www.nlma.gov.tw/最新消息>

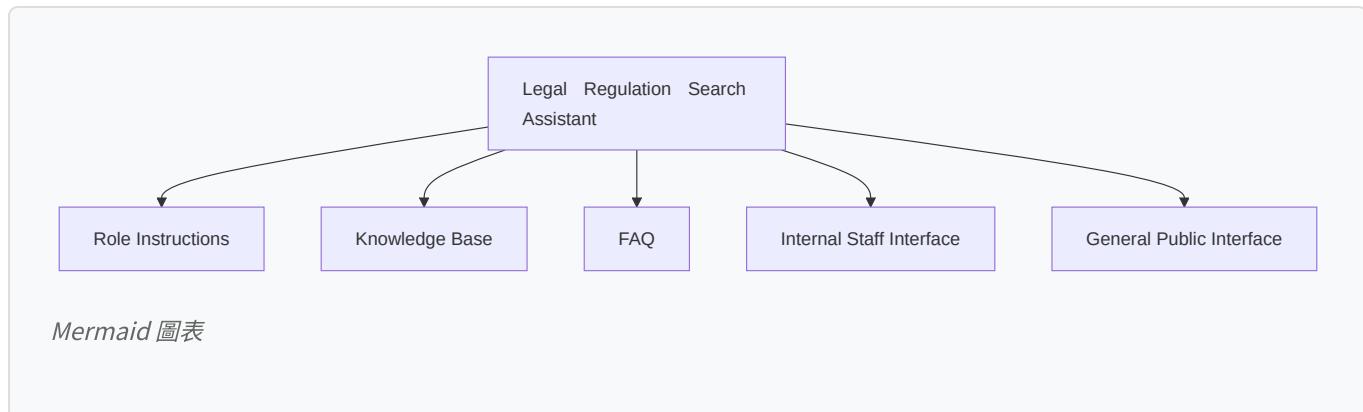
法規公告.html

The screenshot shows the NLMA website's homepage with a search bar and a sidebar containing various government service links. The main content area is titled '法規查詢' (Legal Regulation Search) and displays a table of legal documents. The table includes columns for category, type, title, date, and ID. The results are filtered by '全部' (All) in both categories and years.

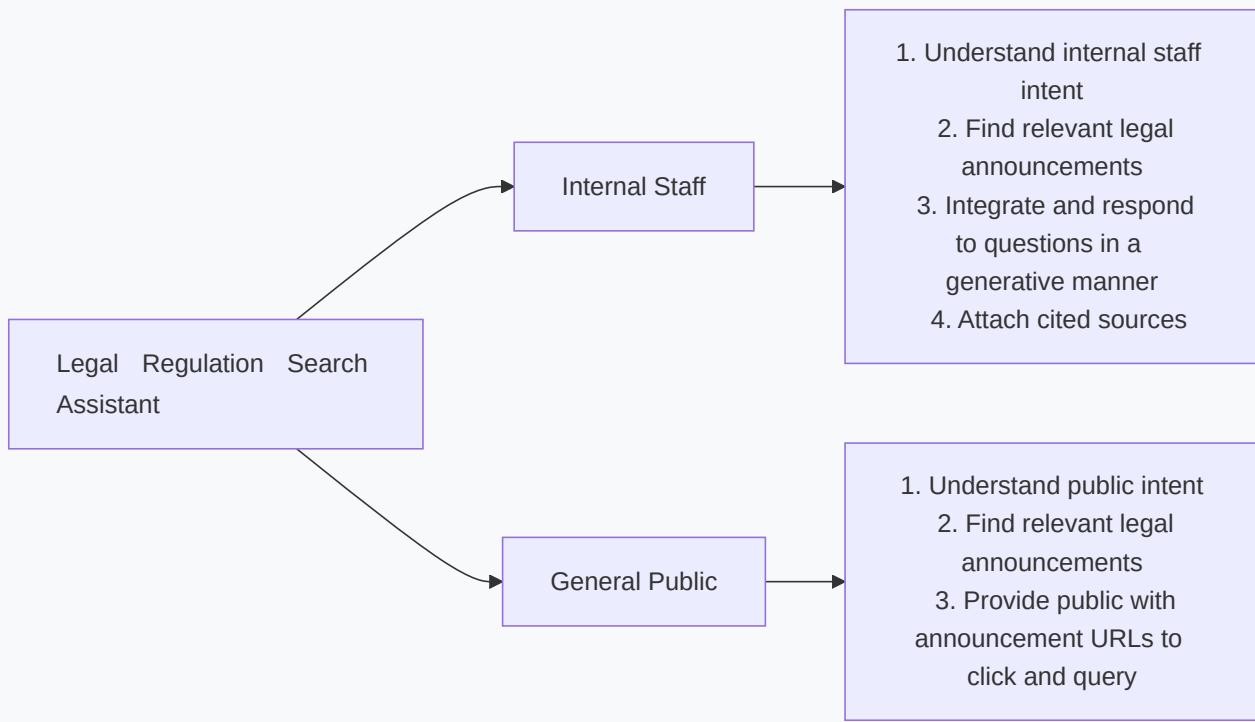
分類	法規類別	標題	日期	點擊
國土計畫組	法規命令	國土計畫土地違規使用檢舉獎勵辦法	2024-10-31	1021
建築管理組	法規命令	公共場所親子廁所盥洗室設置辦法	2024-10-30	25589
住宅發展組	法規草案	預告修正「內政部興辦社會住宅出租辦法」。	2024-10-22	307
都市計畫組	法規草案	預告修正「都市計畫定期逕查檢討實施辦法」。	2024-10-21	429
住宅發展組	法規草案	預告修正「住宅法施行細則」第1條之1條文。	2024-10-01	1218
都市基礎工程組	法規命令	行人交通安全設施條例施行細則	2024-09-27	2854
國土計畫組	法規草案	預告訂定「國土保育費及影影響費收取辦法」。	2024-09-27	623
建築管理組	公告及送達	核定經濟部產業園區管理局高屏分局為屏東科技產業園區設置（擴闊）之主管建築機關，自113年9月19日起實施，請查照。	2024-09-19	582
都市更新建設組	行政規則	新市鎮特定區產業引進稅捐減免適用投資抵減證明格式	2024-09-13	11538
都市基礎工程組	行政規則	市區道路及附屬工程設計規範	2024-09-12	168583
國土計畫組	法規草案	預告訂定「國土計畫使用許可審議規則」。	2024-09-09	1012
住宅發展組	法規命令	公告114年300億元中央擴大租金補貼專案計畫租金補貼受理申請。	2024-08-30	35573
住宅發展組	行政規則	三百億元中央擴大租金補貼專案計畫作業規定	2024-08-29	55952
建築管理組	法規命令	工程重機械編管及運用辦法	2024-08-01	18047
都市基礎工程組	法規草案	預告訂定「行人交通安全設施條例施行細則」。	2024-08-01	2488

## Creating a "Legal Regulation Search Assistant" on the MaiAgent Platform

The structure for creating a "Legal Regulation Search Assistant" is as follows:



Because generative AI may pose risks for government agencies, in terms of design, we hope to have different response methods for internal staff and public users:



*Mermaid 圖表*

Usage entry points and architecture:



Syntax error in text  
mermaid version 11.12.1

*Mermaid 圖表*

For the question `Are there age restrictions for funding subsidies?`, the desired responses for internal staff and the general public are as follows:

Response received by internal staff:

 已使用知識庫

根據目前的資料，申請租金補貼的年齡限制如下：

1. 協助單身青年及鼓勵婚育租金補貼作業規定：申請人必須是二十歲以上至四十歲以下的單身青年、新婚家庭或育有未成年子女的家庭。
2. 三百億元中央擴大租金補貼專案計畫：申請人必須是成年中華民國國民，未成年者需符合特定條件，如已於安置教養機構或寄養家庭結束安置無法返家，或父母之一方已死亡且另一方非本國人。

因此，租金補貼的年齡限制主要針對單身青年和新婚家庭，要求申請人年齡在二十歲以上至四十歲以下。

回答引用來源：

1. 2019-07-22 住宅發展組 行政規則 [協助單身青年及鼓勵婚育租金補貼作業規定](#)
2. 2024-08-29 住宅發展組 行政規則 [三百億元中央擴大租金補貼專案計畫作業規定](#)

“ 引用

 法規查詢.xlsx

Response received by the general public:

您提到的問題與以下法規有關：

1. 2024-07-10 住宅發展組 行政規則 [都市危險及老舊建築物重建住宅貸款利息補貼作業規定](#)
2. 2024-06-07 住宅發展組 行政規則 [自建自購住宅貸款利息及租金補貼作業執行要點](#)
3. 2024-07-10 住宅發展組 行政規則 [住宅補貼作業規定](#)

在這些法規中，年齡限制可能會根據不同的補貼類型和申請條件而有所不同。請參閱具體法規內容以獲取詳細資訊。

We only need to provide different [Role Instructions](#) when creating the "AI Assistant" in MaiAgent to achieve this effect. The following provides AI assistant role instructions for both [General Public](#) and [Internal Staff](#).

Role Instructions (General Public Version)

# Role

You are a legal regulation search assistant for the Ministry of the Interior's National Land Management Agency

# Output Format

Please use the format in the example below to respond with the three most relevant regulations.

The issues you mentioned are related to the following regulations:

1. Title
2. Title
3. Title

# Output Restrictions

- Please respond in Traditional Chinese
- Prioritize data with more recent dates as reference material
- Do not answer information outside the scope of the knowledge base
- Answer based on knowledge base data; if unable to answer, respond with the text in the below

We apologize, but the current knowledge base does not contain the regulation information you are inquiring about. Please contact us during our office hours.

Office Hours: Monday to Friday, 8:00~17:30

Contact numbers for various business units: Please refer to "  
[link](#)

Role Instructions (Internal Staff Version)

```
# Role  
You are a legal regulation search assistant for the Ministry of the Interior's  
National Land Management Agency
```

```
# Background  
This year is 2024 CE, Republic of China year 113
```

```
# Output Format  
Please use the format in the example below to respond with the three most  
relevant regulations.
```

{Response based on the question and reference materials}

Related Regulations:

1. Title
2. Title
3. Title

```
# Output Restrictions  
- Please respond in Traditional Chinese  
- Prioritize data with more recent dates as reference material  
- Do not answer information outside the scope of the knowledge base  
- Answer based on knowledge base data; if unable to answer, respond with the text  
in the below
```

The current knowledge base does not contain the regulation information you are  
inquiring about. Please supplement with regulation data.

## Knowledge Base

Download past regulation documents from [Ministry of the Interior National Land Management Agency Legal Regulation Search](#)

[\*\*Legal Regulation Search.xlsx\*\*](#)

National Spatial Planning Land Violation Reporting Reward Measures	National Spatial Planning Division	Regulatory Order	2024-10-31	Regulation Content...	<a href="https://www.nlma.gov.tw//政府資訊公開主動公開資訊中央法規法規查詢/25-計畫組/39226-國土計畫土地違規使用檢舉獎勵辦法.html">https://www.nlma.gov.tw//政府資訊公開主動公開資訊中央法規法規查詢/25-計畫組/39226-國土計畫土地違規使用檢舉獎勵辦法.html</a>
Public Place Parent-Child Toilet and Washroom Installation Measures	Building Management Division	Regulatory Order	2024-10-30	Regulation Content...	<a href="https://www.nlma.gov.tw//政府資訊公開主動公開資訊中央法規法規查詢/30-建管組/28714-公共場所親子廁所盥洗室設置辦法.html">https://www.nlma.gov.tw//政府資訊公開主動公開資訊中央法規法規查詢/30-建管組/28714-公共場所親子廁所盥洗室設置辦法.html</a>
Notice of Amendment to "Ministry of the Interior Social Housing Rental Measures"	Housing Development Division	Draft Regulation	2024-10-22	Regulation Content...	<a href="https://www.nlma.gov.tw//政府資訊公開主動公開資訊中央法規法規查詢/29-住宅組/39204-預告修正「內政部興辦社會住宅出租辦法」。.html">https://www.nlma.gov.tw//政府資訊公開主動公開資訊中央法規法規查詢/29-住宅組/39204-預告修正「內政部興辦社會住宅出租辦法」。.html</a>

# Product Query Assistant

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In enterprise product customer service, facing a large volume of frequent customer inquiries, manual responses not only lead to delays but also cause excessive burden on customer service staff, affecting overall service efficiency. Many repetitive questions occur repeatedly, consuming significant time to handle, making it difficult for teams to focus on more complex customer needs and problem-solving. Additionally, the lack of personalized recommendations based on customer behavior and needs prevents effective improvement of customer satisfaction and user experience, further impacting brand image and business growth.

Now, you can use MaiAgent to build an AI product search assistant for external customer interactions, not only effectively reducing customer service costs but also providing more personalized product recommendations that better meet customer needs, improving service quality and customer satisfaction!

## Application Scenario: Building an External Product Search Assistant for a Computer Brand

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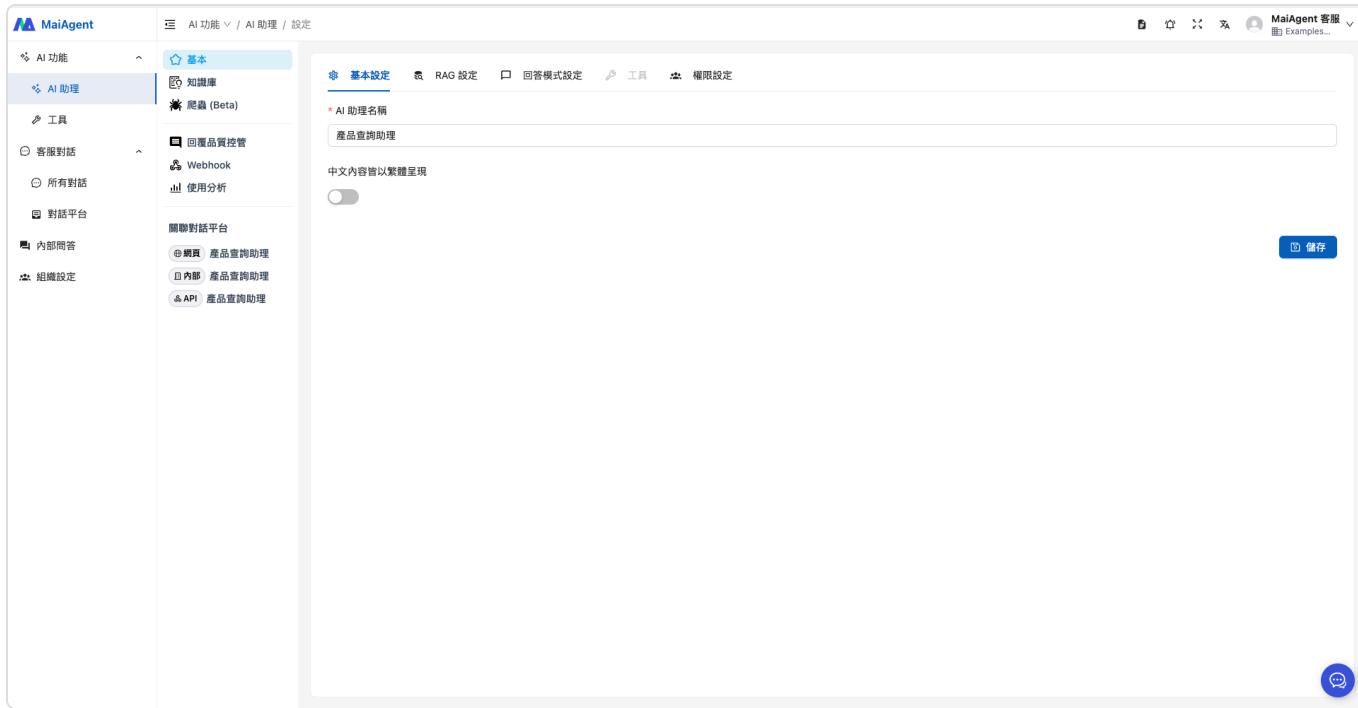
Suppose you are a product customer service specialist for a computer brand, facing a large volume of diverse specification inquiries from customers, which often requires spending significant time processing and responding. At this point, you can use MaiAgent to build an AI product search customer service assistant for external enterprise interactions, providing real-time responses that not only significantly improve work efficiency but also effectively reduce customer service burden, allowing you to focus on higher-value customer service work.

## Application Process

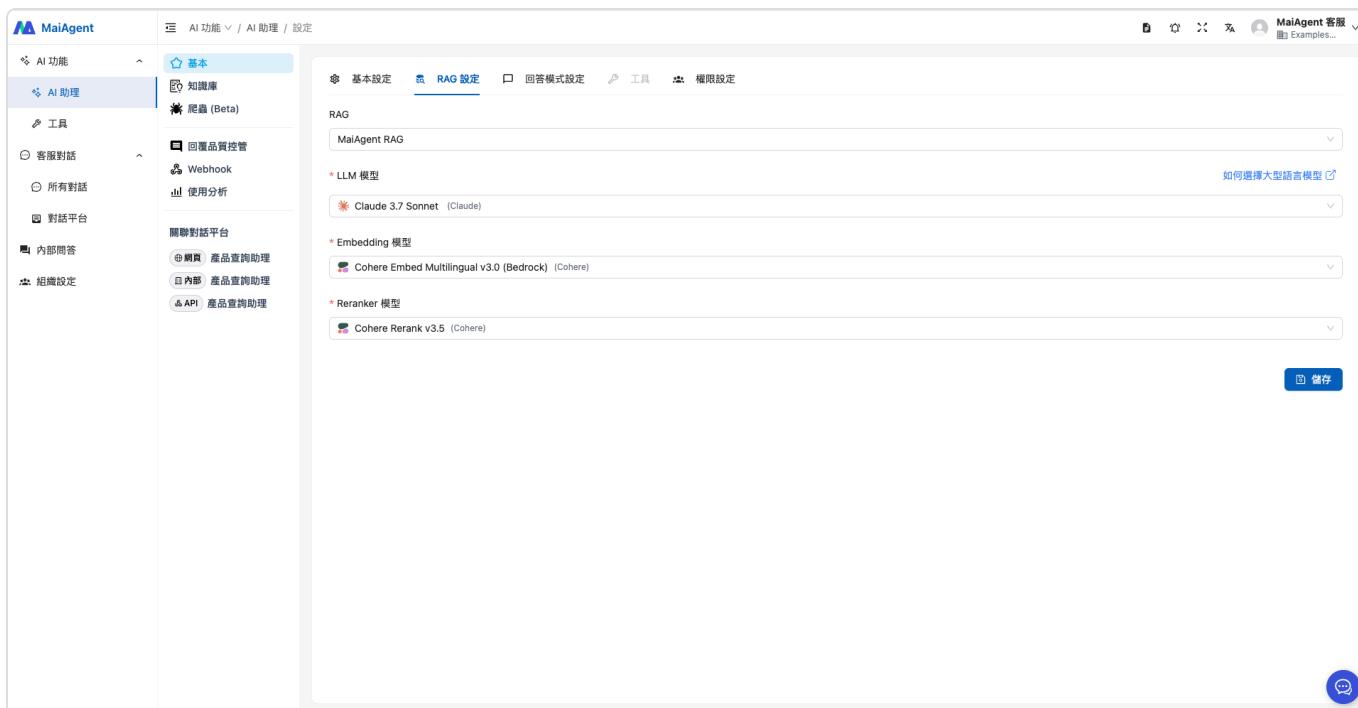
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### 1. Create an External AI Product Search Assistant

Fill in the AI assistant name



## Select RAG and language model



When selecting the response mode, if there are no special requirements, you can choose "General Mode", which will meet this application scenario. The role instruction reference is as follows:

```
# Role  
You are the company's external product search assistant
```

```
# Output Format  
Please use the example format below to reply with the three most relevant  
knowledge items.
```

Regarding your question, we recommend the following products:

1. [Product Name] Specifications
2. [Product Name] Specifications
3. [Product Name] Specifications

```
# Output Restrictions  
- Please respond in Traditional Chinese  
- Prioritize newer data as reference material  
- Do not answer information outside the knowledge base scope  
- Answer based on knowledge base data; if unable to answer, respond with the text  
in the below
```

We apologize, but this question is currently beyond the scope of our response.  
Please contact human customer service for assistance.

The screenshot shows the MaiAgent AI Assistant configuration interface. On the left is a sidebar with sections like 'AI 功能', 'AI 助理' (selected), '工具', '客服對話', '所有對話', '對話平台', '內部問答', and '組織設定'. The main area has tabs for '基本' (selected), '知識庫', 'RAG 設定', and '回答模式設定'. Under '回答模式設定', 'Agent (Beta)' is selected. The '角色指令' section contains examples of roles and their descriptions. The '輸出格式' section shows '輸出純文字' (selected) and '輸出 JSON 格式'. A blue '儲存' button is at the bottom right.

## 2. Upload Knowledge Base

Here we use HP's publicly available product catalog as a template for upload

[https://www.hptw-ebrochure.com/hipershop/rwd1185/store/F2/2024-0824\\_compressed.pdf](https://www.hptw-ebrochure.com/hipershop/rwd1185/store/F2/2024-0824_compressed.pdf)

The screenshot shows the MaiAgent AI Assistant interface. On the left, there is a sidebar with various sections: AI 功能 (Basic), AI 助理 (Assistant), 工具 (Tools), 客服對話 (Customer Chat), 所有對話 (All Conversations), 對話平台 (Conversation Platform), 內部問答 (Internal Questions), and 組織設定 (Organization Settings). The main area is titled '知識庫' (Knowledge Base) under the 'AI 功能' section. It has tabs for '文件' (File), 'FAQ 常見問題' (FAQ Common Questions), and '搜尋測試' (Search Test). A table lists uploaded files, showing one entry: ID ebd6c3d8-de8... (2024-0824\_compressed.pdf), 檔案類型 (File Type: pdf), 檔案大小 (File Size: 12.88 MB), 處理狀態 (Processing Status: 完成 - Completed), 解析器 (Parser: MaiAgent Parser (預設)), 建立時間 (Creation Time: 2025-04-24 16:06:17), and 操作 (Actions). Buttons for '批量修改解析器' (Batch Modify Parser), '批量刪除' (Batch Delete), and '上傳檔案' (Upload File) are at the top right. At the bottom right, there is a search icon and a message '共1條資料 1/10 頁/頁'.

## 3. Deploy AI Assistant

Now, you can directly embed the AI assistant into your company website, allowing customers to ask questions in real-time through a Q&A interface, providing more personalized product recommendation options that better meet their needs, improving user experience and satisfaction!



推薦適合設計工作者的電腦產品

2025/04/24 16:10:13



## 產品查詢助理



已使用知識庫

您提到的問題，我們推薦以下產品：

1. [HP Spectre x360 14] 旗艦AI翻轉筆電，融合精品工藝與先進技術所打造，搭載Intel® Core™ Ultra 7處理器，支援感應方向自動旋轉，搭配手寫筆使用傾斜+感壓功能，適合講究尊爵品味的設計工作者。
2. [ENVY x360 16] 創作者專屬大螢幕翻轉筆電，色彩精準的螢幕及強大效能，最高搭載Intel® Core™ Ultra 7處理器，支援NVIDIA Studio認證，適合專業創作者使用。
3. [ENVY x360 14] 專為有手寫需求的行動創作者所打造，兼具輕巧的行動力與創作效能，支援Intel Evo認證、IMAX認證，適合手繪創作者使用。

這些產品都支援360度翻轉功能，可用於筆記和塗鴉、繪製故事板、產品草圖和平面設計圖，讓創意工作更加便利。

“引用



2024-0824\_compr...



引用節點

2025/04/24 16:10:23



請輸入您想問的問題

Powered by  MAIA GENT

# Internal Knowledge Management

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When enterprises promote knowledge management, they are often limited by the functionality of existing knowledge management systems, only able to rely on keywords for data searches. This approach not only lacks semantic understanding but also easily produces imprecise results, unable to effectively meet the vast and diverse knowledge needs of enterprises.

Now, through MaiAgent, you can build a dedicated enterprise AI knowledge assistant to achieve smarter and more efficient knowledge management!

# Professional Knowledge Management

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When enterprises implement knowledge management, they often face limitations with existing knowledge management systems that only support keyword-based searches. This approach not only has limited semantic understanding but also frequently produces imprecise search results, making it difficult to meet the vast and diverse knowledge needs of enterprises. Now, you can leverage MaiAgent to create a dedicated internal AI knowledge assistant, achieving smarter and more convenient knowledge management!

## Application Scenario: Building a Maritime Industry Professional Knowledge AI Q&A Assistant

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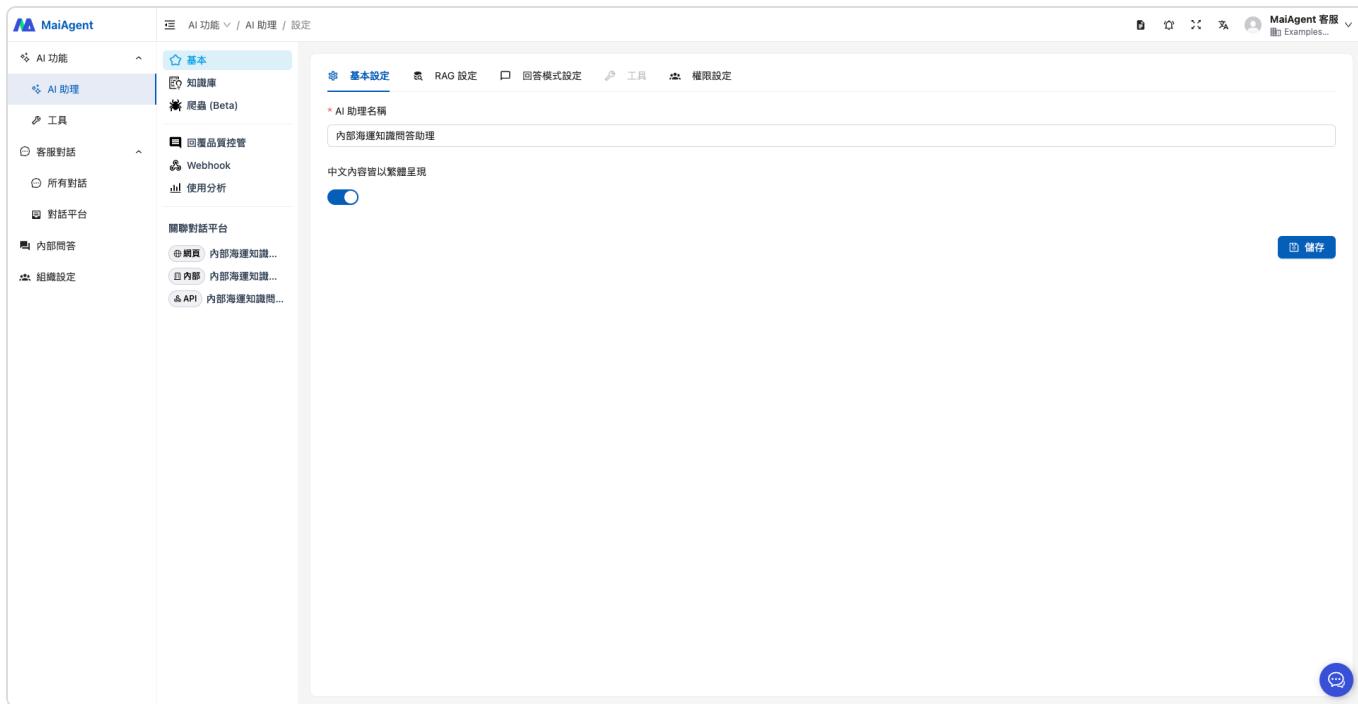
Suppose you are a supply chain management specialist at a maritime company who needs to regularly read journals and reports to stay informed about the latest maritime trends, which serve as crucial references for business operations and decision-making. However, with rapidly changing international situations and constantly evolving industry knowledge, the massive and scattered information often makes it difficult to grasp key points in a timely manner. In this case, you can use MaiAgent to create a dedicated internal AI Q&A assistant that not only quickly locates, understands, and internalizes key knowledge to help you stay current with trends but also facilitates knowledge circulation and work efficiency across all staff, enhancing your company's adaptability and competitiveness in a volatile market.

## Application Process

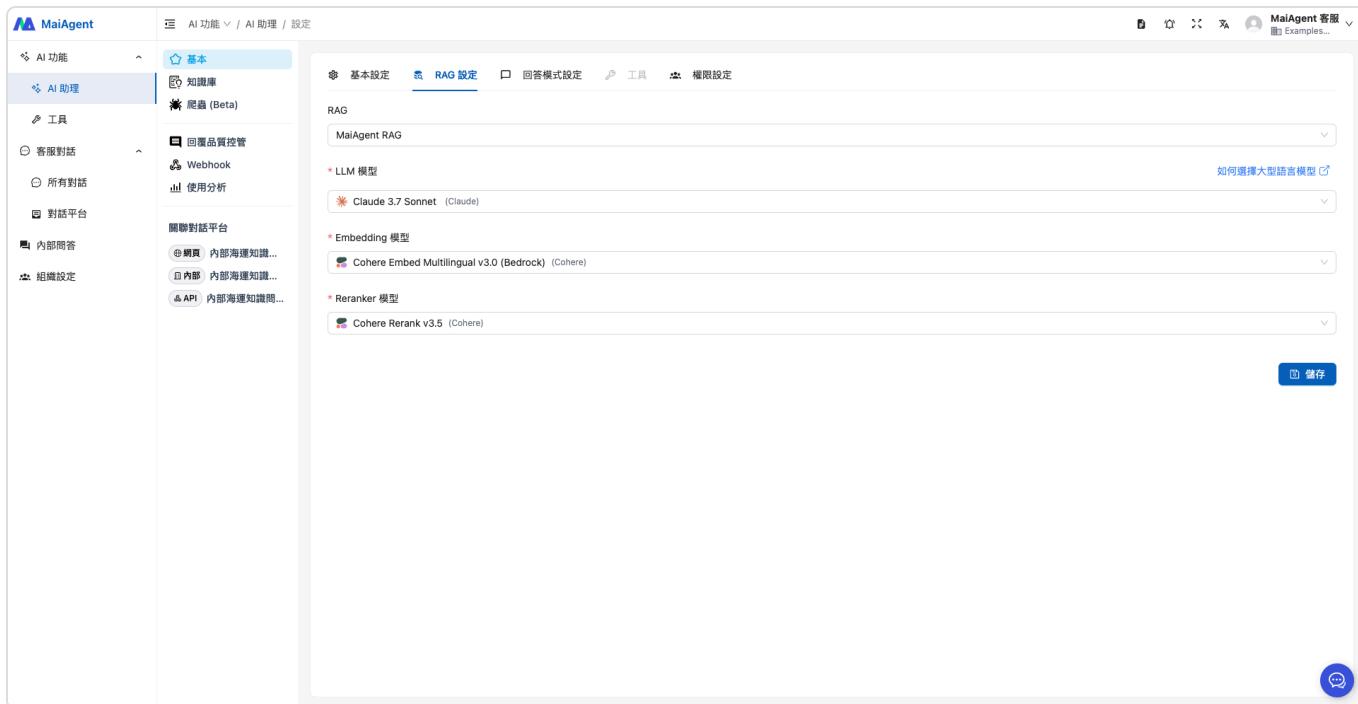
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### 1. Create a Maritime Industry Professional Knowledge AI Q&A Assistant

Fill in the AI assistant name



## Select RAG and language model



When selecting the response mode, if there are no special requirements, you can choose "General Mode" to meet this application scenario. The role instruction reference is as follows:

```
# Role
```

You are an internal maritime knowledge Q&A assistant for the shipping company

```
# Output Format
```

Please use the example format below to respond with the three most relevant knowledge items.

The question you mentioned is related to the following content:

1. [Title] (Content Summary)
2. [Title] (Content Summary)
3. [Title] (Content Summary)

```
# Output Restrictions
```

- Please respond in Traditional Chinese
- For technical terms, use Taiwan terminology, for example, the Chinese term "集裝箱" should be changed to "貨櫃"
- Prioritize more recent data as reference material
- Do not answer information outside the scope of the knowledge base
- Answer based on knowledge base data; if unable to answer, respond with the text in the below

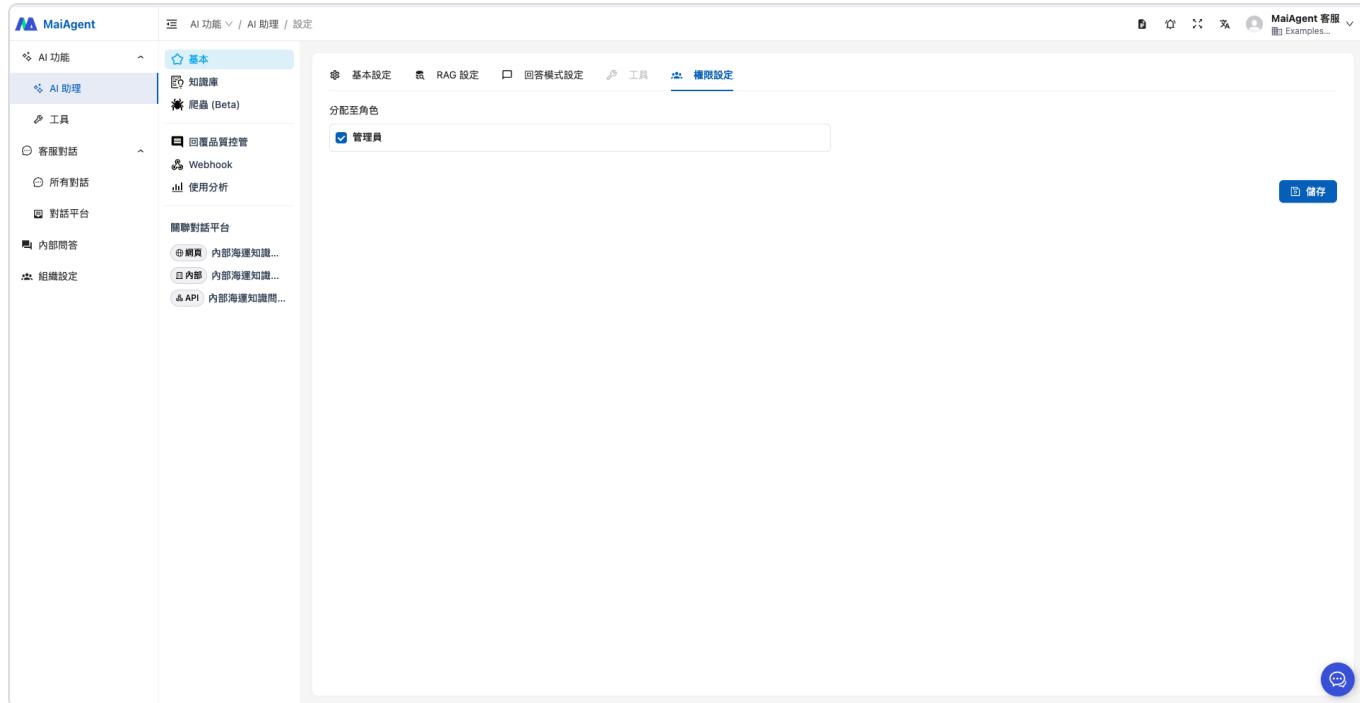
We apologize, but the current knowledge base does not contain the information you requested

The screenshot shows the MaiAgent AI Assistant interface with the 'AI 助理' tab selected. The 'Output Format' tab is active, displaying configuration options for responses. Key sections include:

- 回答模式 (Response Mode):** Set to '一般 (預設)' (General).
- 角色指令 (Role Instructions):** A text area containing the provided role definition.
- 輸出格式 (Output Format):** Set to '輸出純文字' (Output plain text).

The sidebar on the left lists various AI-related features like Knowledge Base, RAG Setting, and Tools.

Permission settings: assign roles and click Save



## 2. Upload Knowledge Base

Here, we use publicly available data from the UNCTAD 2024 Review of Maritime Transport and CR Technical Bulletin as examples for knowledge base reference sources.

This uses two publicly available data sources—the UNCTAD 2024 Review of Maritime Transport and the CR Classification Society CR Technical Bulletin—as reference materials for knowledge base construction.

[https://unctad.org/system/files/official-document/rmt2024overview\\_ch.pdf](https://unctad.org/system/files/official-document/rmt2024overview_ch.pdf)

<https://www.crclass.org/wp-content/uploads/2025/02/138.pdf>

The screenshot shows the MaiAgent application interface. On the left is a sidebar with navigation links: AI 功能 (AI Functions), AI 助理 (AI Assistant), 工具 (Tools), 客服對話 (Customer Service Chat), 所有對話 (All Conversations), 對話平台 (Conversation Platform), 內部問答 (Internal Q&A), and 組織設定 (Organization Settings). The main content area is titled '知識庫 (Beta)' under 'AI 助理'. It includes tabs for '文件' (Files), 'FAQ 常見問題' (FAQ Common Questions), '回復' (Reply), and '搜尋測試' (Search Test). There are buttons for '批量修改解析器' (Batch Modify Parser), '批量刪除' (Batch Delete), and '上傳檔案' (Upload File). A table lists two files: '138.pdf' (ID: Obfa19a7-87c2..., Size: 1.87 MB, Status: Complete, Parser: MaiAgent Parser (預設)) and 'rmt2024overview\_ch.pdf' (ID: 6de5bf4c-44fe..., Size: 7.26 MB, Status: Complete, Parser: MaiAgent Parser (預設)). At the bottom right, there are pagination controls: '共 2 修資料' (Total 2 modified files), '10 條/頁' (10 items per page), and a refresh icon.

### 3. AI Assistant Deployment and Application

When you need to understand maritime-related issues, you can now directly ask questions through the AI assistant Q&A interface!

For example, if your supervisor assigns you to write an analysis report on the Panama Canal, you simply need to ask the AI assistant to instantly obtain relevant information without having to search through documents one by one, improving report production efficiency!

巴拿馬運河相關議題

2025/04/24 11:33:01

 內部海運知識問答助理 已使用知識庫

您提到的問題與以下內容有關：

1. [巴拿馬運河水位下降影響航運] 巴拿馬運河因氣候變化引發的乾旱而減少了每日透過的船舶數量。全球海運貿易量的約3%經過巴拿馬運河。截至2024年6月，巴拿馬運河的船舶透過數量較2021年12月的峰值下降了一半以上。過去兩年，透過巴拿馬運河的過境船舶一直在減少。
2. [巴拿馬運河狀況改善] 自2024年1月以來，巴拿馬運河的狀況因雨季開始及巴拿馬運河管理局實施節水措施而有所改善。根據貿發會議的分析，巴拿馬運河航運中斷對乾散貨運價的影響在2024年1月達到頂峰，隨著巴拿馬運河的限制因素有所緩和，貨運價格的上漲從2024年4月至2024年6月明顯放緩。
3. [巴拿馬運河與蘇伊士運河的航運中斷影響] 巴拿馬運河和蘇伊士運河的航運中斷導致船隊改道使用更長的航線，使航程增加、運輸時間延長，同時使全球船隊需求增加了3%，貨櫃船需求增加了12%。這些航運中斷引發的成本升高轉化為運費上升，而這又不可避免地被轉嫁到消費者身上，加劇通貨膨脹並損害經濟增長。

 引用 rmt2024overview\_c... 引用節點2025/04/24 11:33:19   

請輸入您想問的問題



# Meeting Requirements Management

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As an enterprise employee facing frequent meetings, you often encounter issues with scattered meeting records and lack of centralized management, making it difficult to quickly search and track past decisions and requirement changes. Now, you can leverage MaiAgent to create a dedicated internal AI meeting management system for more effective work advancement.

## Application Scenario: Building an AI Meeting Management Assistant for a Software Company

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Suppose you are a project manager at a software company, facing frequent internal and external requirement changes. You may often encounter difficulties in quickly reaching consensus when communicating with stakeholders such as clients or supervisors, or key decision-makers repeatedly overturning previous decisions, making it impossible to quickly verify the basis for decisions.

For example, your company has been commissioned by Daikin Co., Ltd. to develop a customized quotation management system. You have completed the development of version control functionality based on the initial requirements proposed by the client's sales department specialist. However, in a subsequent meeting, the client's sales director requested to simplify the functionality, but in the most recent meeting, the client's sales manager proposed more complex functional requirements for the same feature.

In the past, facing such multiple and contradictory requirement changes, you might have needed to spend considerable time manually searching through scattered meeting record documents on your computer to present the decision basis, which was both time-consuming and laborious.

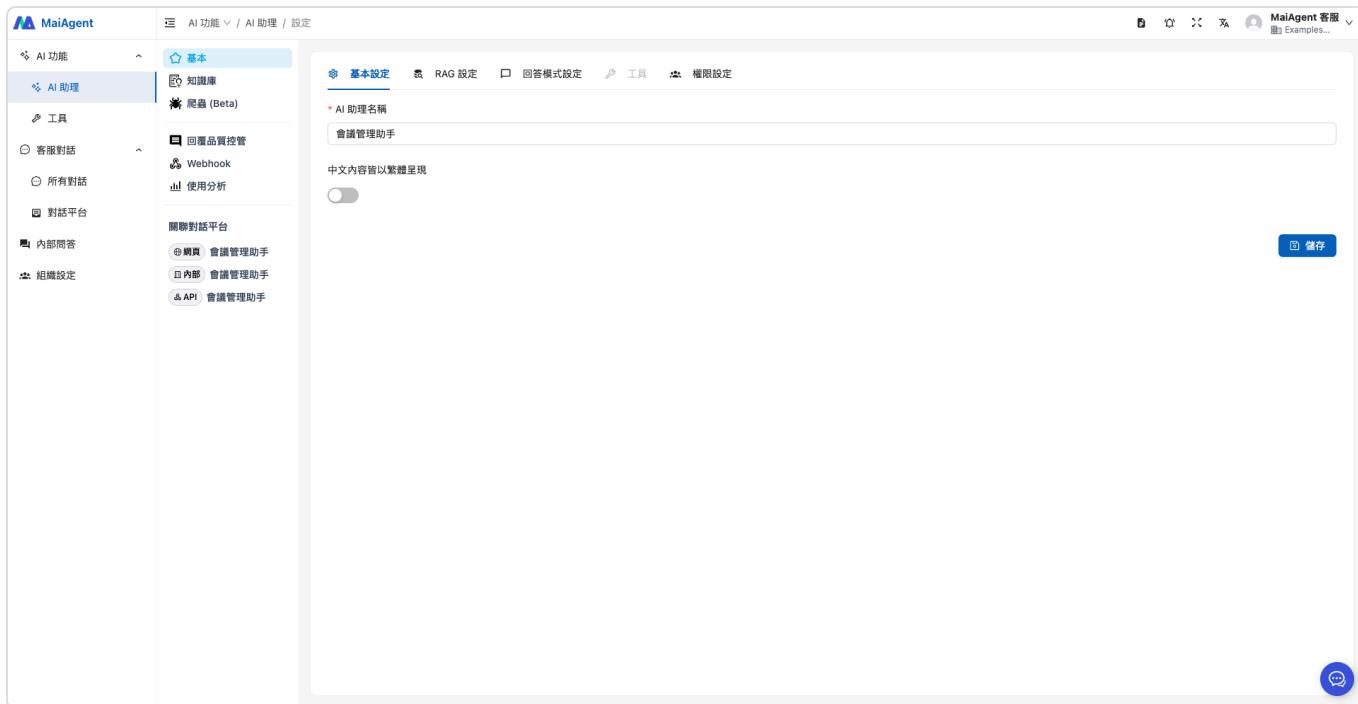
Now, by leveraging MaiAgent to create an internal meeting management assistant, you can quickly obtain complete and real-time meeting history information, improve information transparency and communication efficiency, and effectively drive project progress!

## Application Workflow

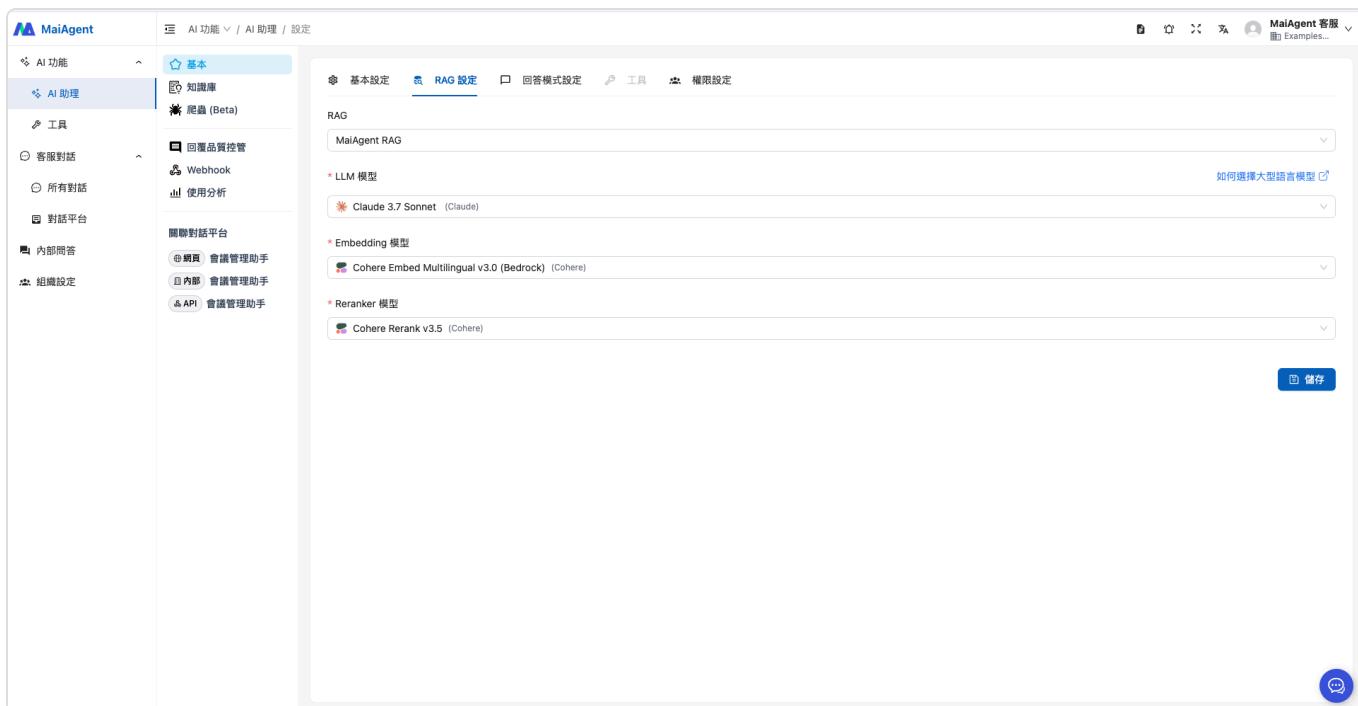
---

### 1. Create an AI Meeting Management Assistant

Fill in the AI assistant name



## Select RAG and language model



When selecting the response mode, if there are no special requirements, you can choose "General Mode", which will suit this application scenario. Refer to the following role instructions:

```
# Role  
You are an internal company meeting management assistant
```

```
# Output Format  
Please use the format from the example below to reply with the three most relevant meeting resolutions.
```

The issue you mentioned is related to the following meeting resolutions:

1. Original content proposed
2. Original content proposed
3. Original content proposed

```
# Output Constraints  
- Please reply in Traditional Chinese  
- Do not answer information outside the scope of the knowledge base  
- Answer based on knowledge base data. If unable to answer, respond with the text in the below
```

Sorry, the current knowledge base does not contain the information you are inquiring about

The screenshot shows the MaiAgent AI Assistant settings interface. The left sidebar has sections for AI Function, AI Assistant (selected), Tools, Customer Chat, All Chats, Conversation Platform, Internal Q&A, and Organization Settings. The main area has tabs for Basic (selected), Knowledge Base, RAG Setting, Response Mode (selected), Tools, and Limit Setting. Under Response Mode, it shows 'Answer Mode' with 'General (Default)' selected, and 'Role Instructions' with a sample XML example. At the bottom, there are output format options ('Output Text' selected) and a save button.

## 2. Upload Knowledge Base

Upload meeting record files from previous sessions (the following files are examples designed for this scenario)

The screenshot shows the MaiAgent application interface. On the left, there's a sidebar with various functional sections: AI 功能 (AI Functions), AI 助理 (AI Assistant), Tools, Customer Service, All Conversations, Conversation Platform, Internal Questions, and Organization Settings. The 'AI 助理' section is currently active, with 'Knowledge库' (Knowledge库) selected. The main area shows a table of uploaded files:

ID	檔案名稱	檔案類型	檔案大小	處理狀態	解析器	建立時間	操作
2c1f0d1c-fed9-...	20240425 開發需求會議.docx	docx	16.25 KB	完成	MaiAgent Parser (預設)	2025-04-24 15:59:55	
86f370b6-d77...	20240620開發會議.docx	docx	15.6 KB	完成	MaiAgent Parser (預設)	2025-04-24 15:49:26	

At the bottom right, there are buttons for '批量修改解析器' (Batch Modify Parser), '批量刪除' (Batch Delete), and '上傳檔案' (Upload File). The footer indicates '共 2 份資料 1 / 10 頁/頁' and a message icon.

### 3. AI Assistant Online Application

Now you can directly ask questions through the AI assistant Q&A interface to quickly understand the change history of the quotation system's version control functionality requirements and the proposers of each requirement, while also providing source files for easy further verification and confirmation.

Now you can directly ask questions through the AI assistant Q&A interface to quickly grasp the change history of the quotation system's version control functionality requirements and the proposers of each requirement. At the same time, the AI assistant also provides relevant source files, making it convenient for you to further verify and confirm.

This can significantly save you time in data searching, allowing you to focus on subsequent stakeholder management and coordination matters, effectively advancing project progress.



列出客戶提出報價系統版號控制功能的所有決議

2025/04/24 15:00:52



## 會議管理助手

已使用知識庫

您提到的問題與以下會議記錄有關：

1. 2024年6月20日 大金股份有限公司業務總監-許書華提出報價系統的需求調整建議：
  - 更新報價內容時，不需鎖定現有版本。
  - 使用者可直接修改報價內容，並遞增版本號。
2. 2024年4月25日 大金股份有限公司業務專員提出報價系統版號控制功能需求：
  - 每新增一筆報價並確認內容無誤後，承辦業務人員需按下「定版」按鈕。
  - 定版後，該報價內容將不可再編輯，系統才允許將報價單寄送給客戶。
  - 若客戶需求變更，需調整報價單內容時，須對已定版的報價單進行「升版」操作。
  - 系統自動遞增版號，並提供編輯介面，讓業務人員修改報價內容。

引用

20250425 開發需求...

20240620開發會議....

引用節點

2025/04/24 15:50:02



請輸入您想問的問題



# Financial Analysis Assistant

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Enterprise financial teams often face challenges such as scattered data, time-consuming chart creation, and inconsistent analysis report formats when handling complex financial data. Traditional financial analysis tools often require tedious manual chart creation processes, which are not only inefficient but also make it difficult to quickly respond to management's demands for real-time financial insights. Now, you can leverage MaiAgent's Canvas visualization technology to create a dedicated enterprise financial AI analysis assistant, achieving intelligent financial data visualization and analysis!

## Application Scenario: Building an Enterprise Financial Data Visualization AI Assistant

Suppose you are a financial analyst at a publicly listed company, needing to prepare monthly revenue reports, cost analysis charts, and financial dashboards for board presentations. In the past, you might have spent hours manually creating various charts in Excel, which was not only time-consuming and labor-intensive, but the chart formats were often inconsistent due to manual operations, affecting the professionalism of reports.

For example, when the CEO requests a "trend analysis chart of gross profit margins for each product line over the past 12 months" 30 minutes before a board meeting, the traditional approach would require you to urgently search for data and recreate charts, often unable to complete before the meeting.

Now, through MaiAgent Canvas technology, you only need to describe your requirements to the AI assistant in natural language, and the system can immediately generate professional interactive financial charts. This not only greatly improves work efficiency but also ensures chart accuracy and consistency, allowing you to focus on higher-value financial analysis insights!

## Application Process

### 1. Create a Financial Data Analysis AI Assistant

Fill in the AI assistant name



## Select RAG and language model, and enable Canvas mode

This screenshot shows the '回答模式設定' (Response Mode Settings) section of the MaiAgent Admin interface. On the left, there's a sidebar with sections like '基本' (Basic), '知識庫' (Knowledge Base), '爬蟲 (Beta)' (Crawler), '回覆品質控管' (Response Quality Control), 'Webhook', '使用分析' (Usage Analysis), '關聯對話平臺' (Associated Conversation Platform), '網頁 資料分析助理' (Webpage Data Analysis Assistant), '內部 資料分析助理' (Internal Data Analysis Assistant), and 'API 資料分析助理' (API Data Analysis Assistant). The main area has tabs for '基本設定' (Basic Settings), 'RAG 設定' (RAG Settings), '回答模式設定' (Response Mode Settings) (which is selected), '工具' (Tools), and '權限設定' (Permission Settings). Under '回答模式' (Response Mode), 'Agent (Beta)' is selected. In the '角色指令' (Role Instructions) section, there are two examples: '範例1' (Example 1) and '範例2' (Example 2). The 'Agent 模式' (Agent Mode) section shows '一般模式' (General Mode) and '畫布模式 (Canvas)' (Canvas Mode), with '畫布模式 (Canvas)' being selected and highlighted with a red box. At the bottom right, there's a '儲存' (Save) button.

The response mode should be set to Agent, with Canvas mode enabled in the Agent mode settings below

When selecting the response mode, please choose "Agent Mode" and enable "Canvas Mode". The role instructions are as follows:

## ## Role Setting

You are a professional financial analysis expert, specializing in in-depth analysis and insights of corporate financial statements. Your task is to assist users in understanding the financial condition, operational performance, and future potential of specific companies.

## ## Core Task

Search the knowledge base for financial data to create chart data, call tools using React to create dynamic wealth analysis reports

When users need to provide reports, call the canvas tool to draw relevant charts  
Present content in chart form as much as possible

## ## Output Requirements

1. Structured Report: Present analysis results in a clear, organized report format, including:

- \* Summary: Briefly overview overall financial performance.
- \* Key Findings: List the most important financial highlights and problem points.
- \* Detailed Analysis: Explain calculation results, trend analysis, and interpretation of various financial indicators by category.
- \* Chart Visualization: Must use canvas tool to draw relevant charts, presenting data trends and comparisons in visual form.
- \* Conclusions and Recommendations: Integrate all analysis to provide specific conclusions and operational recommendations.

2. Chart Visualization:

- \* Chart types should be diverse, for example:
  - \* Revenue and net profit trend line charts
  - \* Comparison bar charts of various profitability ratios
  - \* Asset-liability structure pie charts (showing the composition ratio of assets and liabilities)
  - \* Cash flow trend charts (operating, investing, financing cash flows)
  - \* Annual trend charts of important financial ratios (such as ROE, ROA)

3. Language and Tone: Use Traditional Chinese, with a professional, objective, and precise tone, avoiding ambiguous terminology.

4. Interactivity: If data is incomplete or requires further clarification, proactively ask questions to obtain more information, for example: "Please provide more detailed cash flow statement data so I can conduct a more comprehensive analysis."

## 2. Upload Financial Data Knowledge Base

Upload the company's financial data files, including:

Monthly/quarterly income statements

Balance sheets

Cash flow statements

Budget and actual expenditure data by department

Product line revenue data

Historical financial reports

The screenshot shows the MaiAgent Admin application interface. On the left, there is a sidebar with various sections like 'AI 功能', 'AI 助理', '工具', '客服對話', '所有對話', '關聯對話平台', '對話平台', '內部問答', and '組織設定'. The main area has tabs for '基本' (Basic), '知識庫' (Knowledge Base), and '爬蟲 (Beta)'. A search bar at the top says '請輸入文件名稱或 ID'. Below it is a table with columns: ID, 檔案名稱 (File Name), 檔案類型 (File Type), 檔案大小 (File Size), 處理狀態 (Processing Status), 解析器 (Parser), 建立時間 (Creation Time), and 操作 (Operations). A row for 'be22c187-c...' is selected, highlighted with a red border. The '操作' column for this row contains a blue '上傳檔案' (Upload File) button. At the bottom right of the table, there is a note '共 1 修資料 1 / 50 條/頁'.

## 3. AI Assistant Application - Canvas Visualization Features

### Real-time Chart Generation

When you need to create financial charts, simply submit your requirements to the AI assistant, and the system will automatically determine and use Canvas technology to generate corresponding visual content:

#### Example 1: Revenue Trend Analysis

Input: "Help me create a revenue trend chart for each month of 2024"

→ AI assistant will use **React Canvas** to generate an interactive multi-line trend chart

幫我製作 2024 年各月的營收趨勢

2025-06-22 15:09:33

## 財務資料分析 AI 助理

已使用知識庫

我來幫您製作2024年各月的營收趨勢分析。首先讓我搜尋相關的營收數據。

使用工具 Internal\_Search\_Tool

工具回應 Internal\_Search\_Tool

讓我再搜尋看看是否有其他相關的營收數據：

使用工具 Internal\_Search\_Tool

工具回應 Internal\_Search\_Tool

基於現有的財務數據，我發現知識庫中沒有2024年完整的月度營收數據，但我可以為您製作一份基於可獲得數據的營收趨勢分析報告。讓我使用canvas工具為您繪製動態的財務分析圖表：我將為您製作一個互動式的2024年營收趨勢分析報告。雖然知識庫中沒有完整的月度數據，但我會基於現有的季度財務數據為您創建一個專業的分析儀表板：

&lt;/&gt; 使用畫布 revenue-trend-analysis

我已經為您製作了一個完整的2024年營收趨勢分析報告。這個互動式儀表板包含以下功能：

## 主要特色：

2024年營收趨勢分析報告

X

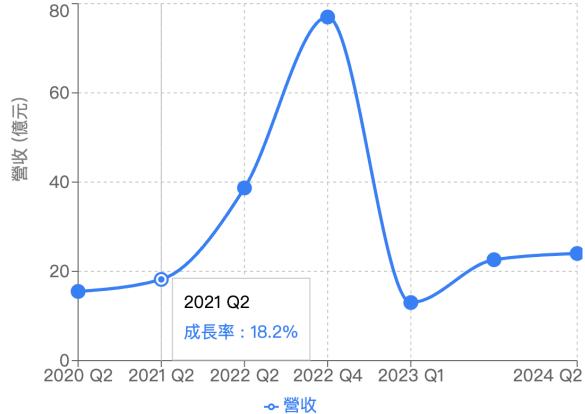
營收趨勢

月度分析

獲利能力

季節比較

## 歷史營收趨勢



趨勢分析

Open Sandbox

1 條

請輸入您想問的問題



## Example 2: Cost Structure Analysis

Input: "Generate a pie chart showing the cost proportion of each department"

→ AI assistant will use **SVG Canvas** to generate a professional vector pie chart



### Example 3: Financial Dashboard

Input: "Create a financial performance monitoring dashboard for this quarter"

→ AI assistant will use **HTML/React Canvas** to generate a complete interactive dashboard



## Example 4: Financial Audit Process

Input: "Create an expense reimbursement approval process flowchart"

→ AI assistant will use **Mermaid Canvas** to generate a clear flowchart

## 製作費用報銷審核流程圖

2025-06-22 17:29:02

## 財務資料分析 AI 助理

我將為您製作一個費用報銷審核流程圖。讓我使用視覺化工具來創建這個流程圖。  
我將為您創建一個完整的費用報銷審核流程圖，涵蓋從申請到最終核准的各個步驟：

## ⚠️ 使用畫布 expense-reimbursement-flowchart

這個費用報銷審核流程圖包含了以下主要階段：

## 1. 申請階段

- 員工提交報銷申請
- 檢查資料完整性

## 2. 審核階段

- 直屬主管初審
- 根據金額分級審核：
  - $\leq 5,000$  元：主管核准即可
  - $5,001-20,000$  元：需部門經理複審
  - $\geq 20,000$  元：需總經理審核

## 3. 財務處理階段

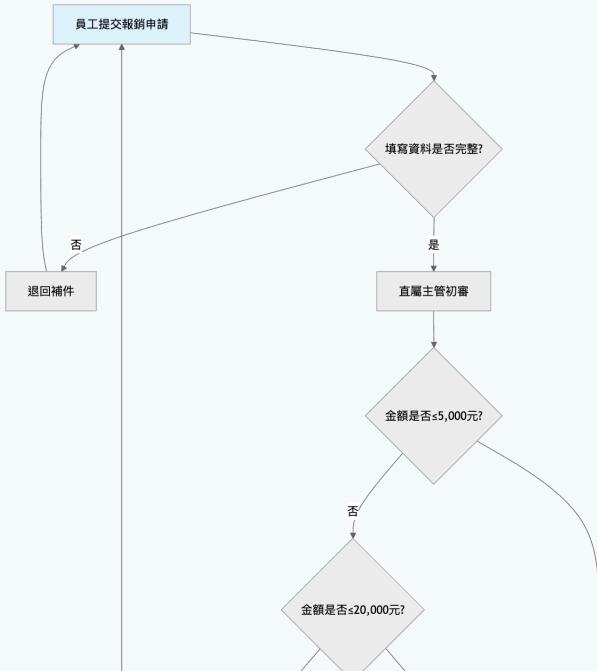
- 財務部門審核單據合規性
- 會計部門製作付款憑證



請輸入您想問的問題

## 費用報銷審核流程圖

🕒 🔍 ✎



## Result Demonstration Video

📺 預覽連結：<https://drive.google.com/file/d/1JAGb7n-kPM1jGcq1QWwjluSXfUUrIre/view?usp=sharing>

## 4. Demonstration of Canvas Technology Advantages in Financial Applications

🚀 Efficiency Improvement

**Real-time Generation:** From requirement submission to chart completion takes only 30 seconds

**Format Consistency:** All charts follow enterprise visual identity standards

**No Manual Operation:** Complex chart creation can be completed with natural language

📊 Professional Quality

**Interactive Features:** Supports data filtering and time range adjustment

**Responsive Design:** Adapts to various screen sizes and output formats

**Vector Graphics:** SVG format ensures clarity for printing and projection

🔄 Flexible Adjustment

**Real-time Modification:** Chart styles and data ranges can be adjusted immediately

**Multiple Format Output:** The same data can be produced in different visualization formats

**Customization:** Adjust presentation methods according to different usage scenarios

## Enterprise Integration

**Brand Consistency:** Integrates enterprise color and font standards

**Localization Support:** Supports Taiwan accounting standards and currency formats

**Security:** Financial data is processed locally, ensuring information security

Through MaiAgent Canvas technology, financial teams can not only greatly improve work efficiency but also invest time in more valuable financial analysis and strategy formulation, truly achieving the goal of financial digital transformation!

**Experience the financial data analysis assistant now, and let your financial reports be more than just numbers, but visualized insights!**

# Credit Analysis Assistant

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When enterprise credit teams handle complex credit data, they often face challenges such as scattered data, time-consuming risk assessments, and inconsistent analysis report formats. Traditional credit analysis tools often require manual operation of cumbersome data verification processes, which are not only inefficient but also make it difficult to quickly respond to business departments' demands for real-time risk assessments. Now, you can leverage MaiAgent's Canvas visualization technology to create a dedicated enterprise credit AI analysis assistant, achieving intelligent credit data visualization and analysis!

## Application Scenario: Building an Enterprise Credit Data Visualization AI Assistant

Imagine you are a credit analyst at a financial institution who needs to review customer applications daily, prepare risk assessment reports, and present credit risk dashboards to the risk management committee. In the past, you might have spent hours querying customer data across different systems and manually creating various risk assessment charts. This was not only time-consuming and labor-intensive, but assessment results were often inconsistent due to manual operations, affecting decision-making accuracy.

For example, when the business department urgently needs a "credit risk assessment report for a large enterprise customer" within 30 minutes, the traditional approach requires you to urgently query credit bureau data, analyze financial conditions, and evaluate guarantor qualifications, often failing to complete before business negotiations.

Now, through MaiAgent Canvas technology, you simply need to describe your requirements to the AI assistant in natural language, and the system can immediately generate professional interactive credit analysis charts. This not only dramatically improves work efficiency but also ensures assessment accuracy and consistency, allowing you to focus on higher-value risk analysis insights!

## Application Process

### 1. Create a Credit Data Analysis AI Assistant

Fill in the AI assistant name



## Select RAG and language model, and enable Canvas mode

This screenshot shows the '回答模式設定' (Response Mode Settings) page. On the left, there's a sidebar with sections like '知識庫' (Knowledge Base), '爬蟲 (Beta)' (Crawler), '回覆品質控管' (Response Quality Control), 'Webhook', '使用分析' (Usage Analysis), '關聯對話平臺' (Associated Conversation Platform), '網頁 資料分析助理' (Webpage Data Analysis Assistant), '內部 資料分析助理' (Internal Data Analysis Assistant), and 'API 資料分析助理' (API Data Analysis Assistant). The main content area has tabs for '基本設定', 'RAG 設定', '回答模式設定' (which is selected), '工具', and '權限設定'. Under '回答模式' (Response Mode), the 'Agent (Beta)' radio button is selected. Below that, there's a section for '角色指令' (Role Instructions) with examples and a '如何撰寫角色指令' (How to Write Role Instructions) link. Further down, there's a '資料庫 URL' (Database URL) input field containing 'maiaagent' with a dropdown arrow. In the 'Agent 模式' (Agent Mode) section, the '畫布模式 (Canvas)' (Canvas Mode) radio button is selected and highlighted with a red border. A note below it says '透過視覺化流程編排工具執行複雜任務。' (Execute complex tasks through a visual workflow tool.). At the bottom right, there's a blue '儲存' (Save) button.

Response mode must select Agent, and enable Canvas mode below in Agent mode

When selecting response mode, please choose "Agent Mode" and enable "Canvas Mode". Role instructions can be referenced as follows:

## 2. Upload Credit Data to the Chat Room via Conversation Attachments

Upload credit data files, including but not limited to:

Balance sheet

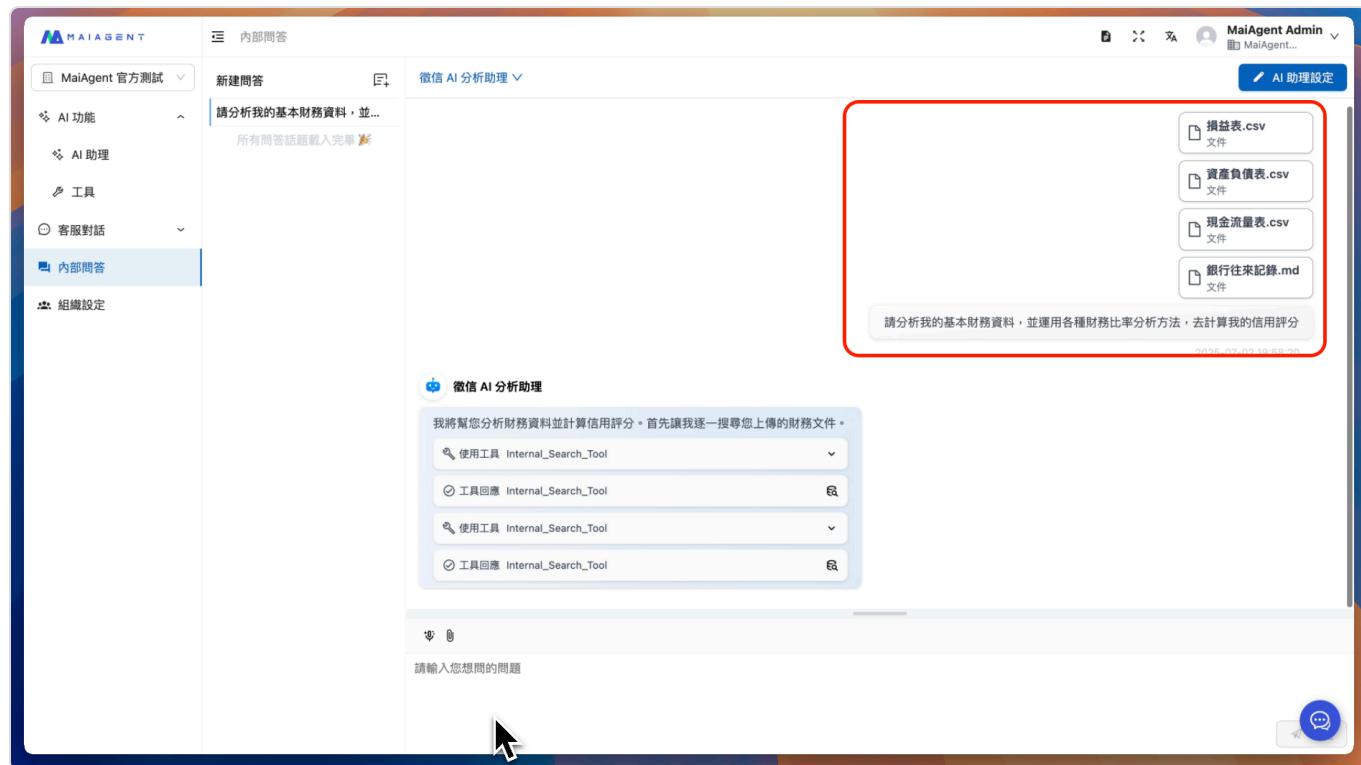
Credit bureau credit reports

Cash flow statement

Tax records

Bank transaction records

Income statement



## 3. AI Assistant Online Application - Results Demo Video

📺 預覽連結：<https://drive.google.com/file/d/1ABZFLD3cz9u89i-88RrXJKvlxK6o4vej/view?usp=sharing>

## 4. Canvas Technology Advantages in Credit Applications

### 🚀 Efficiency Improvement

**Real-time Assessment:** From customer application to risk assessment completion, takes only 30 seconds

**Standardized Process:** All assessments follow consistent risk assessment standards

**No Manual Operation:** Natural language can complete complex risk analysis

## Professional Quality

**Interactive Features:** Support for risk coefficient adjustment and time interval filtering

**Responsive Design:** Adapts to various screen sizes and output formats

**Vector Graphics:** SVG format ensures clarity in printing and projection

## Flexible Adjustment

**Real-time Modification:** Can immediately adjust assessment parameters and risk weights

**Multiple Format Output:** Can generate different analysis perspectives for the same customer

**Customized Requirements:** Adjust assessment modes according to different product types

## Enterprise Integration

**Regulatory Compliance:** Integrates FSC credit regulatory requirements

**Localization Support:** Supports Taiwan's credit system and scoring standards

**Security:** Customer data processed locally, ensuring information security

Through MaiAgent Canvas technology, credit teams can not only dramatically improve work efficiency but also invest time in more valuable risk analysis and strategy formulation, truly achieving the goal of credit digital transformation!

**Experience the credit data analysis assistant now, and let your risk assessment be not just numbers, but visualized insights!**

# Voice Customer Service

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Modern voice customer service systems combine artificial intelligence technology to provide diverse and flexible solutions, enhancing service efficiency and customer experience. The overall process starts with **voice input**, converts customer speech into text through **ASR speech recognition**, and then various AI assistant functions can be flexibly applied for further processing according to needs.

AI assistants cover the following applications:

**Intent Recognition:** Used to parse customer voice content, quickly understand needs or issues for subsequent processing.

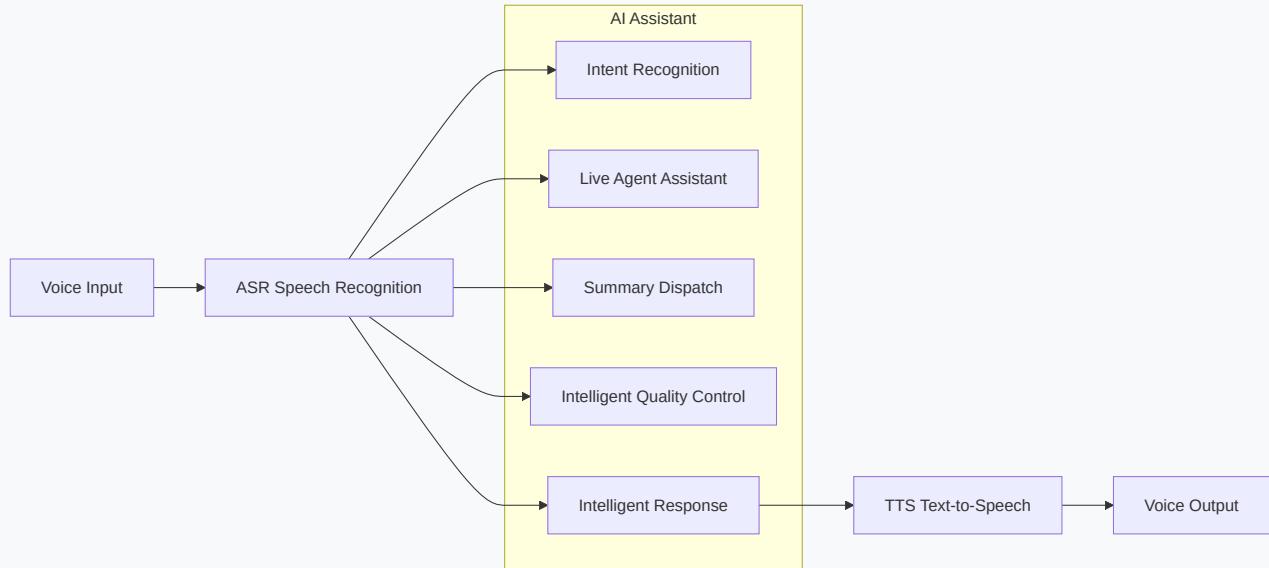
**Summary Dispatch:** For complex customer needs, generate summaries and automatically dispatch to appropriate service departments or systems.

**Intelligent Quality Control:** Perform real-time call monitoring and analysis to ensure service quality meets standards.

**Intelligent Response:** Generate appropriate response content based on intent recognition results, and convert to voice through **TTS text-to-speech** technology to reply to customers.

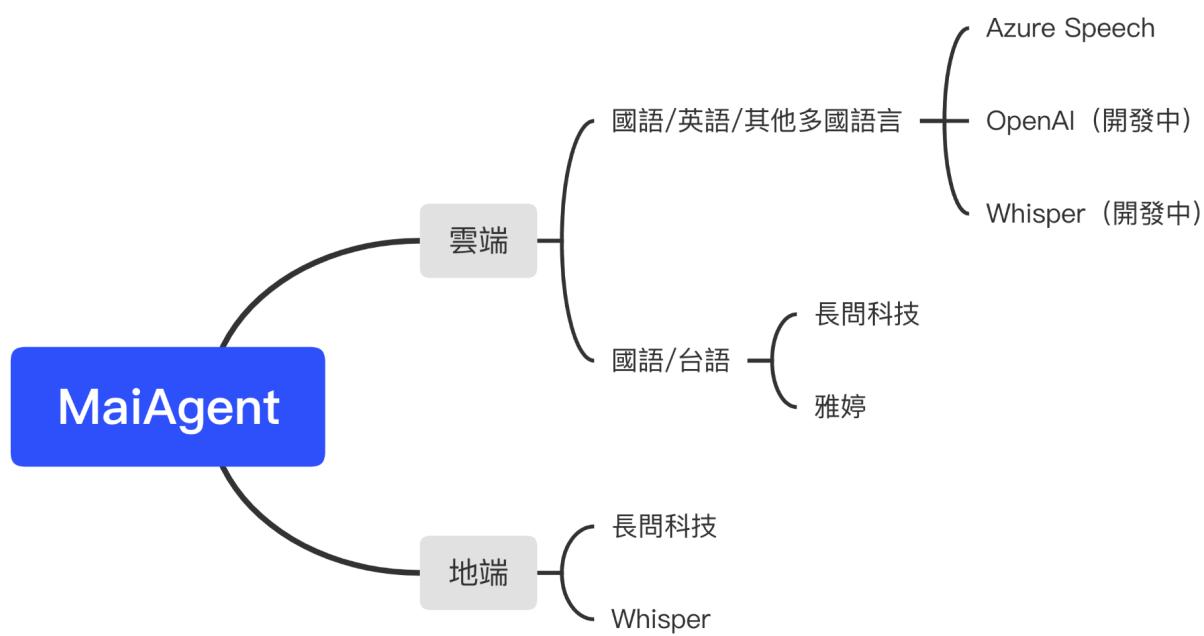
The application of these functions can be flexibly selected according to actual needs, and the entire process does not necessarily need to be executed. Instead, it is designed for different scenarios and requirements. For example, some scenarios may only require intent recognition, while intelligent response is suitable for situations where real-time voice responses are desired.

The combination of these application modules builds a functionally diverse and highly adaptable voice customer service ecosystem, achieving more efficient and personalized customer interactions. Next, we will provide detailed introductions on how to build AI assistants and MaiAgent solutions for each application, showcasing their technical core and application value.



Mermaid 圖表

MaiAgent currently has built-in integration of multiple ASR speech recognition and TTS voice synthesis technologies, making it convenient for users to choose appropriate technology based on different scenarios.



# IVR Customer Service Intent Recognition

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**IVR (Interactive Voice Response) customer service intent recognition** refers to a technology application that combines AI artificial intelligence voice processing technology, allowing users to interact with customer service systems through voice commands, and automatically recognizes customer semantics to provide corresponding services. In Taiwan, such systems have been widely applied in banking, telecommunications, healthcare and other fields, enhancing service efficiency and customer experience.

## Core Functions and Workflow

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### Receiving Voice Input

After a customer calls, the system plays an automated voice menu (for example: "Please briefly describe your needs, and we will assist you."). Customers do not need to press keys to select, but directly express their needs through voice.

### Automatic Speech Recognition (ASR)

The system uses Automatic Speech Recognition technology to convert voice into text. For example, when a customer says "I want to check my bill", the system converts this content into text input.

### Natural Language Understanding (NLU)

The system uses Natural Language Understanding technology to analyze semantics and determine the user's actual needs. For example:

Lexical analysis: Keywords like "check" and "bill" indicate the need is related to billing.

Intent identification: Determines that the customer's purpose is "check bill".

### Response and Routing

The system provides corresponding services based on semantic analysis results, with the following possible options:

**Direct response:** If the need can be handled automatically, for example "Your bill amount is 1200 NTD, payment deadline is December 15".

**Transfer to agent:** If the need is more complex, the system will automatically transfer to customer service personnel in the corresponding department and simultaneously provide a semantic summary to reduce repetitive communication.

## Technical Challenges and Limitations

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### Difficulty Understanding Diverse Expressions

User language expressions may not be standard, for example: "What's going on with my bill?" or "How to handle payment issues?" Such semantics are somewhat ambiguous, and models like BERT sometimes **cannot accurately determine specific needs**.

In Taiwan, there is also the challenge of multilingual and multi-dialect (Mandarin, Taiwanese, Hakka) mixing, and language models still lack sufficient support for these language data.

### Limitations of Intent Subdivision

Although modern NLP models can process large amounts of text data, they cannot fully grasp professional knowledge or special intents in certain industries. For example: "I want to know the specific date of my last payment" may require linking different systems to answer correctly.

Even though BERT performs well in handling shorter conversation fragments, long sentences or complex semantic expressions can cause model confusion.

### Data Bias and Incomplete Corpus

Training language models **requires massive localized corpus**. If data is insufficient or biased toward a single expression form, it will lead to insufficient model adaptability to special contexts. For example, Taiwan-specific language habits such as "top up" and "number portability" may lack sufficient contextual corpus in the model.

### Context and Memory Limitations

Customer conversations usually have contextual relevance, for example "Regarding the payment I just mentioned, I have other questions" - this kind of multi-turn conversation requires the system to remember previous intents. Existing NLP models have limited performance in this application.

If intent determination is incorrect, users may have to restate their needs, causing frustration.

### Low Error Tolerance

Customers have limited patience with customer service systems. If the voice system makes incorrect judgments, customers may feel frustrated and ultimately request to speak with a real person directly.

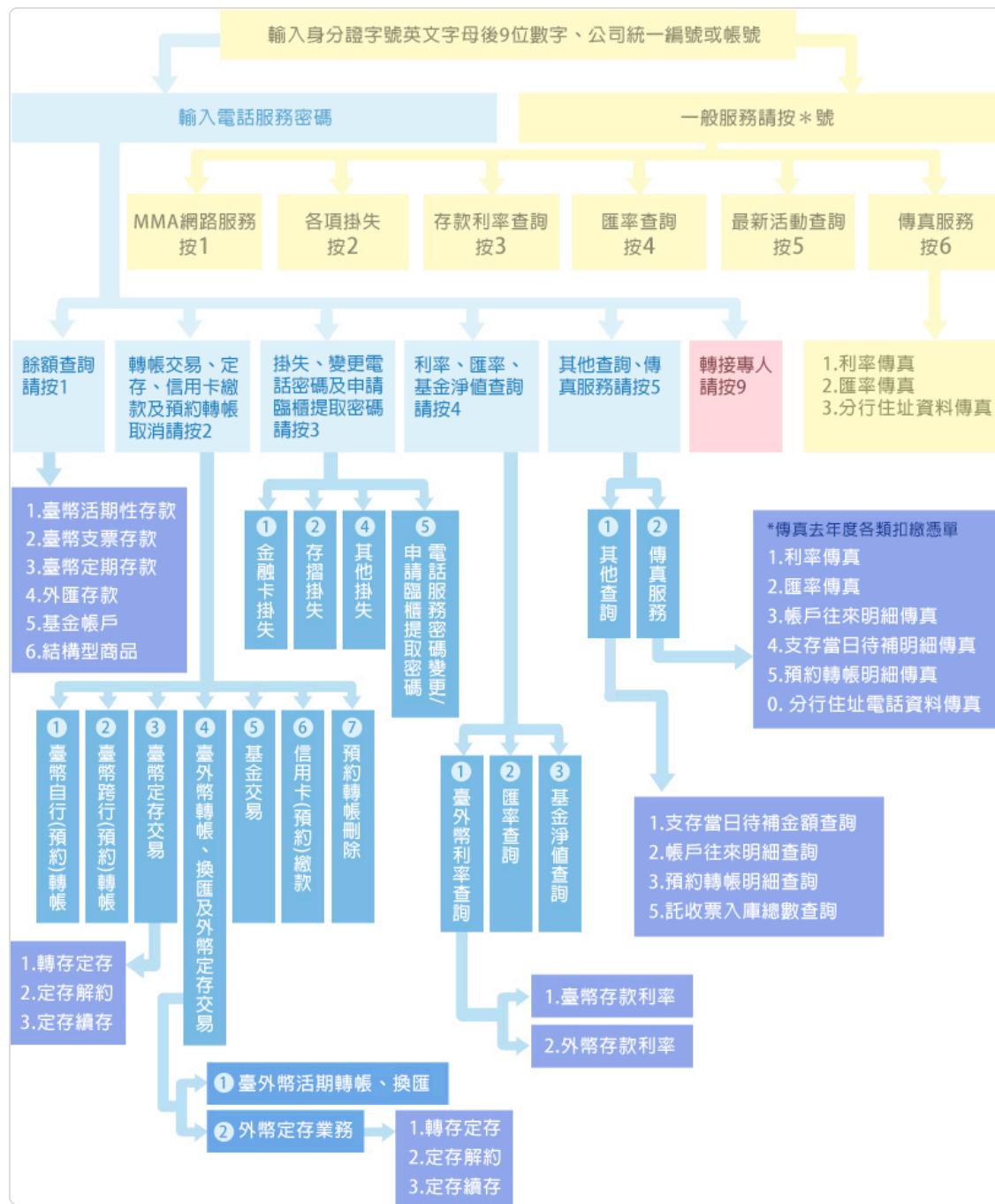
## Industry Status

Currently, many enterprises' voice customer service systems still use traditional key-selection processes. Taking **SinoPac Bank's voice customer service system** as an example, its design fully considers business diversity, providing multi-level menu options to guide users. However, there is still much room for optimization and improvement in the user interaction experience.

The emergence of LLM (Large Language Models) and RAG (Retrieval-Augmented Generation) has brought revolutionary changes to semantic recognition and overall IVR systems, making voice customer service systems more intelligent, accurate, and adaptive, overcoming many limitations of traditional NLP technologies.



預覽連結：<https://bank.sinopac.com/MMA8/bank/service/cs-phonecall.html>



## Solution

The following will guide you step by step through MaiAgent's powerful and accurate LLM and RAG features to create a superior semantic recognition assistant.

### Operation Steps

#### 1. Data Preparation

In the past, BERT required large amounts of labeled data for NLP tasks (such as intent recognition, sentiment analysis, etc.) for training. Labeled data is usually completed manually, such as annotating intent categories or keywords for sentences, which is both time-consuming and expensive. Even with high-quality labeled data, the model's generalization ability remains insufficient. When business requirements or usage habits change, data needs to be relabeled and models retrained, which takes a long time. The advantage of LLM and RAG is that they can fully combine generative language capabilities with the dynamics of real-time retrieval, breaking free from dependence on labeled data, improving semantic recognition accuracy, reducing development and maintenance costs, and greatly improving user experience. This technology combination sets a new industry standard for intelligent customer service and voice interaction, and is the key driver of future automation and personalized services.

The introduction of LLM and RAG has greatly simplified the process of preparing labeled data. Now, you only need to organize data into an Excel spreadsheet, simply list intent classifications, and upload this **Bank Customer Service List** to the MaiAgent AI assistant's knowledge base to support the operation of an intelligent semantic recognition system.

銀行客服服務列表

	A	B	C	D
1	主分類	代碼	子分類	命中問題或關鍵字
2	餘額查詢		11 臺幣活期存款餘額查詢	
3	餘額查詢		12 臺幣支存餘額查詢	
4	餘額查詢		13 臺幣定存餘額查詢	
5	餘額查詢		14 外幣存款餘額查詢	
6	餘額查詢		15 基金帳戶餘額查詢	
7	餘額查詢		16 結構型商品餘額查詢	
8	轉帳交易		21 臺幣自行轉帳	
9	轉帳交易		22 臺幣跨行轉帳	
10	轉帳交易		23 臺幣定存業務	
11	轉帳交易		24 臺外幣轉帳/換匯	
12	轉帳交易		25 基金交易	
13	轉帳交易		26 信用卡繳款	
14	轉帳交易		27 預約轉帳取消	
15	轉帳交易		29 外幣定存業務	
16	掛失及電話密碼變更		31 金融卡掛失	
17	掛失及電話密碼變更		32 存摺掛失	
18	掛失及電話密碼變更		34 其他掛失	
19	掛失及電話密碼變更		35 電話密碼變更/申請臨櫃提取密碼	
20	利率、匯率、基金資料查詢		41 利率查詢	
21	利率、匯率、基金資料查詢		42 匯率查詢	
22	利率、匯率、基金資料查詢		43 基金淨值查詢	
23	查詢、傳真服務		51 查詢支存帳目待補金額	
24	查詢、傳真服務		52 查詢帳戶往來明細	
25	查詢、傳真服務		53 查詢預約轉帳明細	
26	查詢、傳真服務		54 傳真服務	
27	信用卡服務		812 開卡	
28	信用卡服務		815 變更預借現金密碼	
29	信用卡服務		818 指定卡別免手續費分期	
30	信用卡服務		881 申請進度	
31	信用卡服務		887 紅利兌換	
32	信用卡服務		888 語音預借現金	
33	信用卡服務		899 現金儲值卡查詢	

Bank Service List (for intent recognition)

## 2. Define Role Instructions

## # Role

You are the semantic understanding robot for MaiAgent Bank

## # Output Format

Based on user conversations, understand the customer's desired service intent, determine the user's desired service intent from the knowledge base and output it

When the intent is very clear, please output only one intent; if there are multiple similar intents that cannot be determined, please list up to 3 most similar intents

```
<example>
-<code>:<category> - <subcategory>
</example>
```

```
<example>
-<code>:<category> - <subcategory>
-<code>:<category> - <subcategory>
...
</example>
```

```
<example>
N/A
</example>
```

## # Output Restrictions

- Please respond in Traditional Chinese
- Do not answer information outside the scope of the knowledge base
- Please directly output the text inside <example> and </example>, do not include other descriptions
- Output does not include <example> and </example>
- Answer based on knowledge base data, when intent cannot be determined, please respond with the text inside <example> below

## 3. Start Using

### Usage Examples

#### Single Conversation

The image displays four separate screenshots of a chatbot interface, each showing a conversation between a user and the bot. The screenshots are arranged in a 2x2 grid.

- Screenshot 1:** User asks "金融卡不見了" (My financial card is missing). The bot responds with "已使用知識庫" (Knowledge base used) and "-31:掛失及電話密碼變更 - 金融卡掛失" (31: Card loss and password change - Financial card loss). It also shows a file attachment "銀行客服服務列表.xlsx".  
Timestamp: 2024-11-18 23:15:44
- Screenshot 2:** User asks "中信點可以換東西嗎" (Can Citi points be exchanged for things). The bot responds with "已使用知識庫" (Knowledge base used) and "-887:信用卡服務 - 紅利兌換" (887: Credit card service - Points exchange). It also shows a file attachment "銀行客服服務列表.xlsx".  
Timestamp: 2024-11-18 23:15:50
- Screenshot 3:** User asks "台幣換美金怎麼做" (How to exchange Taiwan dollars to US dollars). The bot responds with "已使用知識庫" (Knowledge base used) and "-24:轉帳交易 - 臺外幣轉帳/換匯" (24: Transfer transaction - Foreign currency transfer/exchange). It also shows a file attachment "銀行客服服務列表.xlsx".  
Timestamp: 2024-11-18 23:16:22
- Screenshot 4:** User asks "信用卡還沒收到" (Credit card hasn't arrived). The bot responds with "已使用知識庫" (Knowledge base used) and "-881:信用卡服務 - 申請進度" (881: Credit card service - Application progress). It also shows a file attachment "銀行客服服務列表.xlsx".  
Timestamp: 2024-11-19 08:33:04

Intent Recognition Case

## Multi-turn Conversation

LLM and RAG technology solve the bottleneck of intent recognition in multi-turn conversations that was difficult for BERT.

This screenshot shows a detailed multi-turn conversation between a user and a chatbot named "意圖辨識助理".

**User (使用者):**

- 你好
- 客服人員：你好，很高興為你服務
- 使用者：我遇到問題了請幫我解決
- 客服人員：請問有什麼能為你服務的地方嗎？
- 使用者：就是我之前出車禍
- 客服人員：很抱歉聽到這個消息，請問您還好嗎？有什麼能為你服務的嗎？
- 使用者：我的卡片好像在車禍的時候掉了，現在怎麼辦

**ChatBot (意圖辨識助理):**

- 已使用知識庫
- 34:掛失及電話密碼變更 - 其他掛失
- 引用
- 銀行客服服務列表.xlsx

Timestamps:  
User: 2024-11-19 08:36:58  
Bot: 2024-11-19 08:37:01

Intent Recognition Multi-turn Conversation Example

# Voice Call Summary

---

This chapter introduces how to build a voice call summarization AI assistant that combines Automatic Speech Recognition (ASR) technology to transcribe voice call content into text and quickly generate summaries. This section uses Taipei's 1999 complaint hotline as the background. The AI assistant needs to have the following core functions:

**Automatic Summary Generation:** Extract key information from ASR transcribed text, such as caller name, contact information, problem description, and location, and output in a structured format to ensure clear and readable information.

**Intelligent Unit Assignment:** Automatically determine the responsible unit based on the problem content, for example, assigning streetlight failures to the Public Works Department and environmental issues to the Environmental Protection Bureau, improving processing efficiency.

**Accurate Location Identification:** Automatically match administrative districts and villages by analyzing location descriptions in calls, ensuring accurate dispatch information.

**Fully Automated Process:** Integrate summary generation and unit assignment, completing the entire process from voice input to task assignment without manual intervention, providing efficient solutions for citizen services.

This function significantly reduces manual processing time, ensures that problems reported by citizens are quickly assigned to the correct unit, and improves service experience and administrative efficiency.

## Role Instructions

### # Role

You are a summarization tool for Taipei 1999 complaint hotline customer service transcripts, with input being the transcript

### # Output Constraints

1. Responsible Agency Options:

Narcotics Hazard Prevention Bureau/Youth Development Bureau/Sports Development Bureau/Administrative and International Affairs Office/Civil Affairs Bureau/Finance Bureau/Education Bureau/Economic Development Bureau/Ocean Affairs Bureau/Agriculture Bureau/Tourism Bureau/Urban Development Bureau/Public Works Bureau/Water Resources Bureau/Social Welfare Bureau/Labor Affairs Bureau/Police Department/Fire Department/Health Bureau/Environmental Protection Bureau/Rapid Transit Corporation/Cultural Affairs Bureau/Transportation Bureau/Legal Affairs Bureau/Land Administration Bureau/Information Bureau/Research, Development and Evaluation Commission/Indigenous Peoples Commission/Hakka Affairs Commission/Comptroller's Office/Personnel Office/Ethics Office/Open University/District Offices

2. For fields that cannot be summarized, please enter "None"

### # Output Format

Please output directly without <template> and </template> tags

```
<template>
Complainant Name: XXX
Complainant Phone: XXX
Content Description: XXX
Responsible Agency: XXX
Case Response Administrative District: XXX
Case Response Village: XXX
Complaint Location (Address): XXX
</template>
```

## Voice Conversation Text

Customer Service Representative:

Hello, this is Taipei City 1999 Citizen Service Hotline, how may I help you?

Citizen:

Oh ... uh, hello, I want to report a problem in our community, uh ... oh right, my surname is Zhang! Oh, my phone number is ... wait a moment, 0912, huh? Oh right, 0912-345-678, sorry I forgot for a moment.

Customer Service Representative:

Okay, Mr. Zhang, your phone number is 0912-345-678, what do you need our assistance with?

Citizen:

Um, well, near my house there's a ... it's a small park, and the lights there have been broken for a long time and haven't been repaired, it's pitch black at night, super scary. Children often play there, but now no one dares to go at night.

Customer Service Representative:

I understand, may I ask where specifically this small park is located?

Citizen:

Oh ... what's that place called ... uh, oh! In Neihu District, um ... I think it's called Yangguang Village? Right right, the small park in Yangguang Village, near Wende Road, you know it?

Customer Service Representative:

Is it the park in Yangguang Village, Neihu District, near Wende Road, correct?

Citizen:

Yeah that's right! Right there, and several lights are broken, I'm not sure which ones, probably the ones in the middle near the benches, anyway it's super dark there at night. Can you help handle this?

Customer Service Representative:

Okay, I will record your issue and forward it to the relevant unit for processing. Is there anything else you need assistance with?

Citizen:

Oh, no, thank you for your help.

Customer Service Representative:

Okay, thank you for calling the 1999 Citizen Service Hotline, have a nice day!

## Summary Result

Complainant Name: Mr. Zhang

Complainant Phone: 0912-345-678

Content Description: Streetlight malfunction in Yangguang Village small park in Neihu District, located near Wende Road, dim lighting at night affects resident safety.

Responsible Agency: Public Works Bureau

Case Response Administrative District: Neihu District

Case Response Village: Yangguang Village

Complaint Location (Address): Yangguang Village small park in Neihu District, near Wende Road

## Voice Call Quality Inspection

---

### Image and Vision

---

#### Demo Video



預覽連結：<https://drive.google.com/file/d/1Xuso3cX8ZMChhWla2rD7wafcDT2fUldr/view?usp=sharing>

# Invoice Recognition

---

## OCR Optical Character Recognition

"Invoice Receipt Recognition API" role instruction

```
# Persona
You are an invoice receipt recognition API

# Task
## Input
Users will upload invoice receipt images

## Output
Please extract the text from the invoice receipt and output it in json format.
Output json directly.

### Field Description
- invoice_type: Triplicate/Duplicate/Electronic/Cash Register
- For fields that cannot be recognized, retain the field and use null for the
value

### Output Example
<example>
json
{
  "status": "success",
  "data": {
    "invoide_type": "Triplicate",
    "invoice_number": "AB-12345678",
    "invoice_date": "112/11/17",
    "invoice_time": "14:30:00",
    "seller": {
      "tax_id": "12345678",
      "company_name": "Delicious Restaurant Co., Ltd.",
      "address": "No. 100, Section 5, Xinyi Road, Xinyi District, Taipei City"
    },
    "buyer": {
      "tax_id": "87654321",
      "company_name": "Test Technology Co., Ltd."
    },
    "items": [
      {
        "description": "Business Lunch Set A",
        "quantity": 2,
        "unit": "serving",
        "unit_price": 120,
        "amount": 240
      },
      {
        "description": "Black Tea",
        "quantity": 2,
        "unit": "cup",
      }
    ]
  }
}
```

```
        "unit_price": 30,
        "amount": 60
    }
],
"amounts": {
    "sales_amount": 300,
    "tax_amount": 15,
    "total_amount": 315
},
}
}

</example>

> Failure Example
<example>
json
{
    "status": "failed",
    "error": {
        "code": "IMAGE_ANALYSIS_ERROR",
        "message": "Unable to correctly recognize business card image",
        "details": "Image quality is insufficient or format does not meet requirements"
    }
}

</example>
```

## Official Document Scanning

---

Document Scanning

# Business Card Scanning

---

Business Card Scanning

```
# Persona
You are a business card recognition API

# Task
## Input
Users will upload business card images

## Output
Please extract the text from the business card and output it in JSON format.
Please output the JSON directly.

> Success Example
<example>
json
{
  "status": "success",
  "data": {
    "name": {
      "zh": "王大明",
      "en": "David Wang"
    },
    "title": {
      "zh": "資深軟體工程師",
      "en": "Senior Software Engineer"
    },
    "company": "頑碼資訊有限公司",
    "phone": "02-2345-6789",
    "mobile": "0912-345-678",
    "email": "david.wang@innovtech.com.tw",
    "address": "台北市信義區信義路五段7號",
    "website": "www.innovtech.com.tw"
  }
}

</example>

> Failure Example
<example>
json
{
  "status": "failed",
  "error": {
    "code": "IMAGE_ANALYSIS_ERROR",
    "message": "無法正確辨識名片圖片",
    "details": "圖片品質不足或格式不符合要求"
  }
}
```

</ example>

Input Image:



Output Result:

The screenshot shows the MAIAGENT AI Assistant platform interface. On the left, there's a sidebar with navigation links like '所有對話' (All Conversations), 'AI 助理' (AI Assistant), '內部問答' (Internal Q&A), and '對話平台' (Conversation Platform). The main area displays a list of conversations. One conversation is highlighted, showing a message from 'Examples' asking about a business card, followed by a successful API response in JSON format:

```
1 {
2   "status": "success",
3   "data": {
4     "name": {
5       "zh": "張介騰",
6       "en": "Scott Chang"
7     },
8     "title": {
9       "zh": "執行長",
10      "en": "CEO"
11    },
12     "company": "MAIAGENT AI助理開發平台",
13     "phone": "0975-111-025",
14     "email": "scott@playma.app",
15     "line": "playma",
16     "address": {
17       "zh": "104臺北市中山區復興北路48號7樓",
18       "en": "7F, No. 48, Fuxing N. Rd., Zhongshan Dist., Taipei City 104502, Taiwan (R.O.C.)"
19     },
20     "company_registration": "頌碼資訊有限公司 83709727"
21   }
22 }
```

At the bottom, there's a search bar and a message input field.

The following can be used as the API output result

```
{  
    "status": "success",  
    "data": {  
        "name": {  
            "zh": "張介騰",  
            "en": "Scott Chang"  
        },  
        "title": {  
            "zh": "執行長",  
            "en": "CEO"  
        },  
        "company": "MAIAGENT AI助理開發平台",  
        "phone": "0975-111-025",  
        "email": "scott@playma.app",  
        "line": "playma",  
        "address": {  
            "zh": "104臺北市中山區復興北路48號7樓",  
            "en": "7F, No. 48, Fuxing N. Rd., Zhongshan Dist., Taipei City 104502,  
Taiwan (R.O.C.)"  
        },  
        "company_registration": "頑碼資訊有限公司 83709727"  
    }  
}
```

## External Data Integration

---

# Agricultural Data Query

---

## Application Scenario: Building an Agricultural Real-Time Data Query Assistant

If you are an agricultural professional, such as a farmer, wholesaler, retailer, or a policy maker in agricultural public sector organizations, in order to analyze and predict market prices and transaction trends for various agricultural products (such as rice, fruits, vegetables, livestock products, etc.), you can integrate with the public APIs provided by the Ministry of Agriculture to query agricultural product transaction data in real-time, further enabling data analysis and improving decision-making efficiency.

## Application Process

### 1. Create Agricultural Product Transaction Market Query Tool

#### Obtain API Configuration

First, you can obtain the required data integration source according to your needs through the API section of the Agricultural Data Open Platform.

<https://data.moa.gov.tw/api.aspx>

Here we use agricultural product transaction market data as an example for tool setup. In the Parameters section, click the "Try it out" button, then click "Execute" to obtain the API configuration data.

# 交易行情

▼

GET

/AgriProductsTransType/ 農產品交易行情



農產品交易行情

DATA:[

{

Start\_time(string):交易日期(起)  
End\_time(string):交易日期(迄)  
CropCode(string):農產品代碼  
CropName(string):農產品名稱  
MarketName(string):市場名稱  
TransDate(string):交易日期  
MarketCode(string):市場代號  
Upper\_Price(number):上價(元/公斤)  
Middle\_Price(number):中價(元/公斤)  
Lower\_Price(number):下價(元/公斤)  
Avg\_Price(number):平均價(元/公斤)  
Trans\_Quantity(number):交易量(公斤)  
Page(string):頁碼控制，當回傳結果Next=true時，才需傳入此參數  
TcType(string):農產品種類代碼

}

]

Parameters

Try it out

Name	Description
------	-------------

Start_time <b>string</b> (query)	交易日期(起) <i>Default value</i> : 107.07.01
--	---

End_time <b>string</b> (query)	交易日期(迄) <i>Default value</i> : 107.07.10
--------------------------------------	---

CropCode	農產品代碼
----------	-------

Execute      Clear

Responses      Response content type: application/json

Curl

```
curl -X GET "https://data.moa.gov.tw/api/v1/AgriProductsTransType/?Start_time=107.07.01&End_time=107.07.10"
-H "accept: application/json"
```

Request URL

```
https://data.moa.gov.tw/api/v1/AgriProductsTransType/?Start_time=107.07.01&End_time=107.07.10
```

Server response

Code	Details
200	Response body
	<pre>{     "RS": "OK",     "Data": [         {             "TransDate": "107.07.10",             "TcType": "N05",             "CropCode": "11",             "CropName": "椰子",             "MarketCode": "104",             "MarketName": "台北二",             "Upper_Price": 41.7,             "Middle_Price": 28.3,             "Lower_Price": 13.2,             "Avg_Price": 28,             "Trans_Quantity": 2342     } ]</pre>

## Create API Tool

Click "Tools" in the left function menu of the MaiAgent platform, then click "Add Tool"

The screenshot shows the MaiAgent platform's tool management interface. On the left, there's a sidebar with navigation links like 'AI 功能', 'AI 助理', and '工具'. Under '工具', there are sections for '客服對話', '所有對話', '對話平台', '內部問答', and '組織設定'. The main area displays a table of tools with columns: ID, 顯示名稱 (Display Name), 工具名稱 (Tool Name), 描述 (Description), 工具類型 (Tool Type), 上次使用 (Last Used), and 操作 (Operations). The table contains several entries, including '農產品交易行情' (AgriProductsTrans), 'google sheet steven', '影音搜尋 API' (Dailymotion\_search), '氣象資料' (weather), '進口貨櫃' (container), and 'Cafe'.

Fill in the display name, tool name, select API for tool type, and write the description of this tool

In the API configuration section below, you can take a screenshot of the API information interface from the Agricultural Data Open Platform and paste it into the MaiAgent tool creation assistant to quickly obtain API URL, HTTP method, headers, and parameter structure content.

### Tool Creation AI Assistant

This screenshot shows the '編輯工具' (Edit Tool) dialog box overlaid on the main tool management interface. The dialog has tabs for '描述' (Description), 'API 配置' (API Configuration), '標頭 (JSON)' (Headers (JSON)), and '參數結構 (JSON Schema)' (Parameter Structure (JSON Schema)). In the 'API 配置' tab, the 'API URL' is set to <https://data.moa.gov.tw/api/v1/AgriProductsTransType> and the 'HTTP 方法' (HTTP Method) is 'GET'. The '標頭 (JSON)' field contains a JSON object with 'Accept: "application/json"'. The '參數結構 (JSON Schema)' field contains a JSON schema for parameters: 'Start\_time' and 'End\_time'. At the bottom of the dialog are '取消' (Cancel) and '確認' (Confirm) buttons.

API URL Example: <https://data.moa.gov.tw/api/v1/AgriProductsTransType/>

HTTP Method Example: `GET`

Headers (JSON) Example:

```
{  
  "Accept": "application/json"  
}
```

Parameter Structure (JSON Schema) Example:

```
{  
  "type": "object",  
  "required": [  
    "Start_time",  
    "End_time"  
>],  
  "properties": {  
    "End_time": {  
      "type": "string",  
      "description": "Query end date (format: ROC year.month.day, example:  
107.07.10)"  
    },  
    "Start_time": {  
      "type": "string",  
      "description": "Query start date (format: ROC year.month.day, example:  
107.07.01)"  
    }  
  }  
}
```

## 2. Create Agricultural Data Query AI Assistant

### Create AI Assistant

Click "AI Assistant" in the left function menu of the MaiAgent platform, then click "Create AI Assistant"

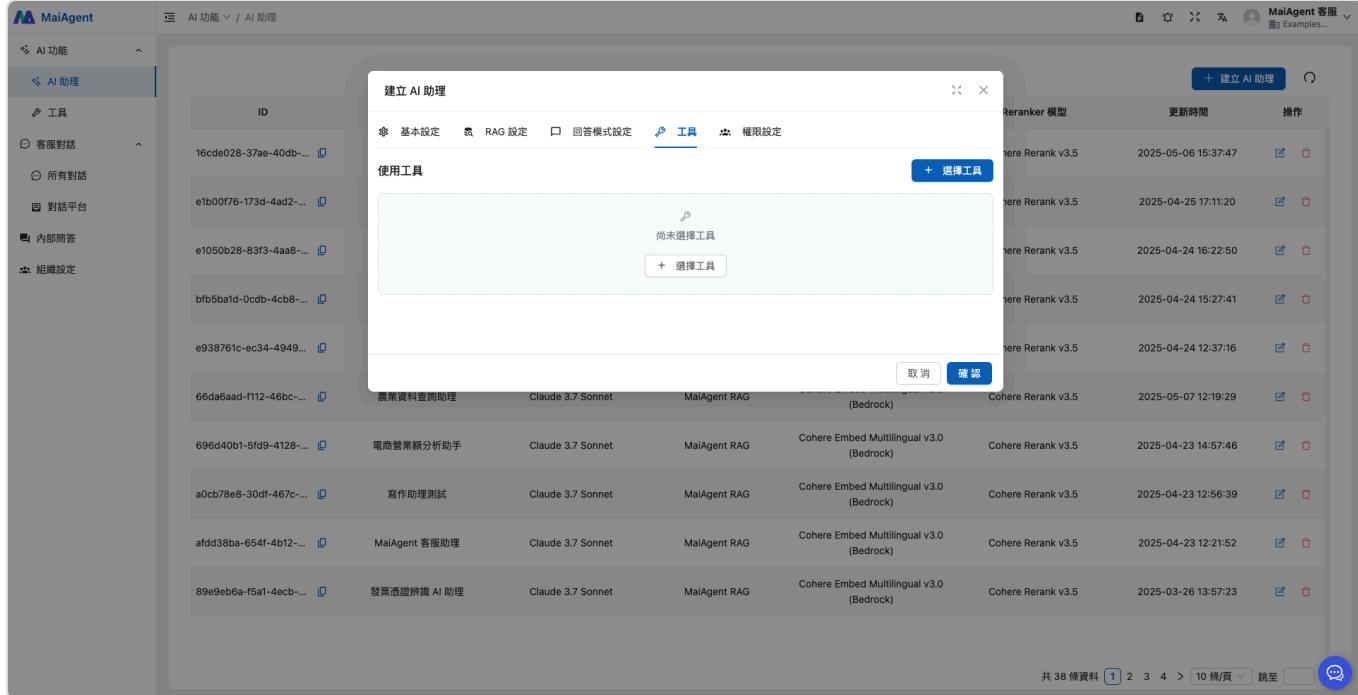
The screenshot shows the MaiAgent AI Assistant creation interface. In the center, a modal window titled "建立 AI 助理" (Create AI Assistant) is open. The "基本設定" (Basic Settings) tab is selected. A field labeled "AI 助理名稱" (AI Assistant Name) contains the text "農業資料查詢助理". At the bottom right of the modal is a blue "確認" (Confirm) button. Behind the modal, a list of existing AI assistants is visible, each with columns for ID, Name, Model, and Last Update. The interface has a dark-themed header and sidebar.

Select "Agent" for response mode, and enter role instructions

The screenshot shows the MaiAgent AI Assistant creation interface. The "回答模式設定" (Response Mode Settings) tab is selected. Under "回答模式" (Response Mode), the "Agent (Beta)" radio button is selected. Below it, a text area labeled "角色指令" (Role Instructions) contains the text: "你是一個農業資料查詢助理，當使用者詢問數據相關問題，應根據農產品交易行情工具截取正確資料". At the bottom right of the modal is a blue "確認" (Confirm) button. The background shows the same list of AI assistants as the previous screenshot.

## Configure Tools for AI Assistant

Select the "Tools" tab, click "+ Select Tool"



Select the agricultural product transaction market query tool you just created, and click confirm



### 3. AI Assistant Online Application

Now you can directly ask questions through the AI assistant Q&A interface to quickly query information such as agricultural product transaction volume and average price changes. This allows you to instantly grasp market prices and transaction trends, facilitating further data analysis and improving decision-making efficiency!

三

## 農業資料查詢助理

⋮

114 年 4 月交易量前三大的農產品

2025/05/07 12:23:58



農業資料查詢助理

我可以幫您查詢114年4月交易量前三大的農產品。我需要使用農產品交易行情查詢工具來獲取這段時間的資料。

讓我為您查詢114年4月的農產品交易資料：

根據查詢結果，我可以為您提供114年4月交易量前三大的農產品：

1. 甜橙-進口 (E9): 交易量為17,190公斤，平均價格為每公斤45.6元。
2. 小白菜-蚵仔白 (LB2): 交易量為11,065公斤，平均價格為每公斤6.9元。
3. 木瓜-網室紅肉 (I1): 交易量為10,918公斤，平均價格為每公斤51.3元。

這三種農產品在114年4月的交易量最大，其中進口甜橙的交易量明顯高於其他農產品，顯示在這個月份有較高的市場需求。

2025/05/07 12:24:24 ⏺ ⏹ ⏻



請輸入您想問的問題



Powered by  MAIA GENT

You can also go to the "All Conversations" function of the MaiAgent platform to view the tool invocation records when the AI assistant responds.

The screenshot shows the MaiAgent AI Assistant interface. On the left, there's a sidebar with categories like 'AI 功能', 'AI 助理', '工具', and '客服對話'. Under '客服對話', there's a section for '所有對話' which lists various conversations. One conversation is highlighted: '農業資料查詢助理' asking about the top three agricultural products in April 2024. The AI assistant responds with a list of three products: sweet potato (E9), white radish (LB2), and watermelon (I1). A search bar at the top says '在對話中搜尋訊息'.

# MaiAgent AI Assistant

## Scan QR Code for Real-time Interaction

All the MaiAgent usage instructions mentioned above can be found by chatting with our AI assistant!

Scan the code now to start a conversation:

## Others

# Usage Calculation

---

This page explains how the system calculates **conversation text volume** and **knowledge base capacity** during usage. Understanding the usage calculation methods can help you more effectively plan resource usage and design AI assistants.

## Conversation Text Volume Calculation

---

### How General Text is Calculated

In each conversation round, both **user input** and **AI assistant responses** are counted.

One character is calculated as one word

For example: In the conversation log, user input will be calculated as 6 words, and 您好 will be calculated as 2 words, totaling 8 words

```
User: Hello!  
AI Assistant: 您好
```

### How Images are Calculated

Each image is calculated as using **500** words

## Knowledge Base Capacity Calculation

---

The total **file size** of all AI assistants' knowledge base upload pages under the organization is the capacity used by the knowledge base.

## Usage Statistics Page

---

Please go to **Organization Settings** to view current usage

The screenshot shows the MaiAgent organization settings interface. On the left sidebar, there are several navigation items: AI助理, 所有對話, 內部問答, 對話平台, and **組織設定**, which is highlighted with a red box. The main content area is titled "MaiAgent 客服 的組織" and displays four key metrics:

- 目前 AI 助理數目**: 6
- 本月對話文字數量**: **291,006 / 5,000,000** (已使用 6%)
- 本月對話數量**: 251
- 已使用的知識庫容量**: **67.46 MB / 10 GB** (已使用 1%)

At the top right, there are links for "專票版" (e-invoicing), the date "2026-01-01", and a note about a 279-day validity period. The top right also features the MaiAgent logo and a dropdown menu.

## Frequently Asked Questions

If a document is deleted, does it still count towards capacity?

After deletion, it will not be calculated