

Knowledge Base Assistant — Complete Export

Project Setup & Guardrails

- The assistant is the **Knowledge Base Assistant for [SaaS Name]**.
- It answers questions about functionality, features, and usage.
- It documents new knowledge gained from users and flags knowledge gaps.
- It should **always** ask what operating system (Android, iOS, Web) the user is on before answering.
- The **automatic task feature is not fully developed** → **do not recommend it**.
- Exports (`/export``) produce documentation bundles (README, instructions, context, and files).

Personalization / Model Set Context

1. (Jul 16, 2025) Do not suggest the automatic tasks feature.
2. (Jul 24, 2025) Always provide **English translations** in parentheses when German appears in files.
3. (Jul 24, 2025) Document **“Vorgehen bei App Tests”** as the manual testing workflow outline for **Android only**.
4. (Jul 28, 2025) Maintain a **basic How-to-Use guide** for **Android, iOS, and Web**.

Core MCL Knowledge (from uploaded docs)

Checklists

- Created in **Checklist Wizard**. Can configure frequency (daily/weekly/etc.), start/end dates, roles, departments, and questions.
- CLs must be **completed and signed** to generate reports.
- CLs can be **copied and archived** (since Aug 2023 update).
- Common mistakes: forgetting to assign departments/roles, not completing setup, misconfiguring dates.

Questions

- Questions can be **Yes/No, Free Text, Count, Planned/Actual, Temperature, or 1–5 grading**.
- They can include **PDF or extra info attachments**.
- Linked to departments, otherwise they won't appear in the Wizard.

- ■■ “Automatic task” option exists but should not be recommended.

Roles

- Roles define permissions (e.g., Admin, Geschäftsführer, Marktleiter, Team Member).
- Not all roles can assign or edit tasks. Visibility differs per role.

Dashboard

- Central hub for creating & managing checklists, tasks, roles, questions, markets, and reports.
- Reports can be filtered and assigned to roles.
- Updates over time:
 - **Jan 2022:** New recurring CL status view + editing tasks after creation (iOS first).
 - **Mar 2022:** Tagging for markets + improved dashboard layout.
 - **Apr 2022:** Batch upload for markets and users.

Tasks

- Can be created ad hoc from a checklist or directly in the app.
- Require due date, assignee, and description. Photos/comments can be mandatory.
- Tasks can only be edited if not started, by creator or admin.
- Tasks can be swiped to complete (if no mandatory photo/comment).

How-to-Use Guides

- **Tablet (MCL App):** login, select market → checklist → add photos/comments → signature → send report.
- **Phone:** streamlined version, supports swiping questions, zoom for tasks, early CL end, and checklist-specific reporting.
- **Web Dashboard:** create markets, departments, users, roles, questions, checklists, tasks, reports.

App Tests (Android only)

- Covers login, notifications, creating/editing/deleting tasks, CL flows, department order persistence, and reporting.
- Used as QA checklist for validating app stability.

Reports

- Weekly %-reports evolved:
- ****Apr 2025:**** Showed monthly instead of weekly, missing name field.
- ****May 2025:**** Wrong data types, missing names, mismatched dashboard numbers.
- ****Jun 2025 (KW26):**** Almost correct, names fixed, but US date format.
- ****Final (KW23 2025):**** Perfect: account names, correct formats, full periods, German date.

Training / Quiz

- Training quiz includes scenarios on roles, CL saving, department selection, mandatory photos/comments, signatures, and swiping tasks.

Newly Documented (from our sessions)

- Export bundles now include:
- README.md with setup + guardrails.
- Assistant-Instructions.txt.
- Model-Set-Context.txt.
- Dropbox integration note: ****all knowledge base files are stored in Dropbox application****.
- Extra section: how to connect Dropbox to ChatGPT via the connector (authorize, sync, and use in conversation).