SUCCESSBYCS · A BEGINNER'S GUIDE

How an AI tool finds the right answer

RAG explained, using a Tradify help centre as the example

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THE PROBLEM

The answer is in there somewhere

The Tradify help centre has **714 articles**. A support rep with a customer waiting can't read them all, and a normal search only matches words. So how can an AI help?

From memory

A general AI answers from what it learned in training. It may be out of date, and it may guess about how Tradify works.

Look it up first

The tool finds the right passages in Tradify's own help centre, then answers from them, with links. This is RAG.

WHAT RAG STANDS FOR

Look it up, then answer

Retrieval

Find the passages that best match the question.

Augmented

Add those passages to the question you send the AI.

Generation

The AI writes the answer from those passages.

STEP 1 · PREPARE (INGESTION)

Read, split, and map the meaning

714
articles read from the help centre

→

2,258
short, focused passages

→

Numbers
an embedding for each passage

An AI model turns each passage into numbers that capture its meaning. Similar meanings get similar numbers, so **“invoice a customer” and “bill a client” land side by side**, even with no words in common.

STEP 2 · THE VECTOR DATABASE

A library sorted by meaning

Every passage is stored next to its numbers in a special database that can search by meaning, not just by matching words.

For the Tradify tool that's **2,258 passages** in a Postgres database (Supabase) with **pgvector**, the add-on that does the meaning search.

Passage	Its numbers
Creating an invoice from a job…	0.12, -0.48, 0.91 …
Sending a quote to a customer…	0.07, 0.33, -0.25 …
Scheduling staff on a job…	-0.61, 0.18, 0.44 …
… 2,255 more	…

STEP 3 · A QUESTION ARRIVES

From question to answer in seconds

Ask

“How do I bill a customer?”

→

Convert

The question gets its own numbers.

→

Find

The 10 passages closest in meaning.

→

Write

Steps from those passages, with links.

The invoicing passages are found even though the customer said “bill”, because they mean the same thing.

STEP 4 · MANAGING THE GAPS

When the answer isn’t good enough

Store

Questions it couldn’t answer well are kept.

→

Group

Similar questions are grouped by topic.

→

Recommend

Suggested articles to add to the help centre.

Add the articles, and the next person who asks gets an answer. **Today** the tool says when it can’t answer and logs weak matches. **Next**, every gap is captured and turned into a regular list of recommended articles.

THE HONEST SUMMARY

What you get, and what to know

What you get

- **Faster:** steps in seconds, not several articles.
- **Checkable:** links to the articles it drew on.
- **Grounded:** built to answer from your own content.
- **Honest:** says when it can’t find an answer.

Worth knowing

- The AI can still misread a passage, so use the links.
- Answers aren’t checked one by one; quality is tested on real questions.
- It’s only as good as the help centre behind it.



ABOUT SUCCESSBYCS

Customer work is a system. Treat it like one.

SuccessByCS is Chris Sparshott's New Zealand-based customer success practice. We help SaaS founders build customer success that drives adoption, retention and expansion, without the bloat.

Post-Sales Reset · Fractional Head of CS · Knowledge base tools · Mentoring

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SEE IT WORKING

Ask it a Tradify question

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Want one built on your own help documents? Talk to Chris at chris@successbycs.com or visit successbycs.com