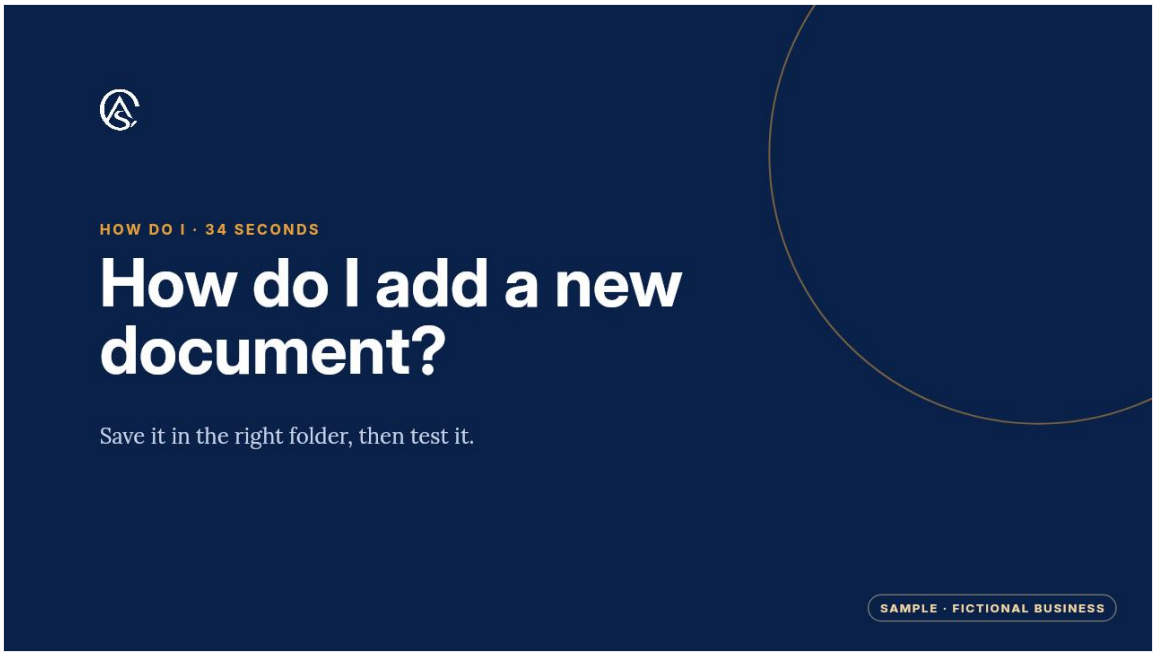
DOCUMENT DESK · HOW DO I

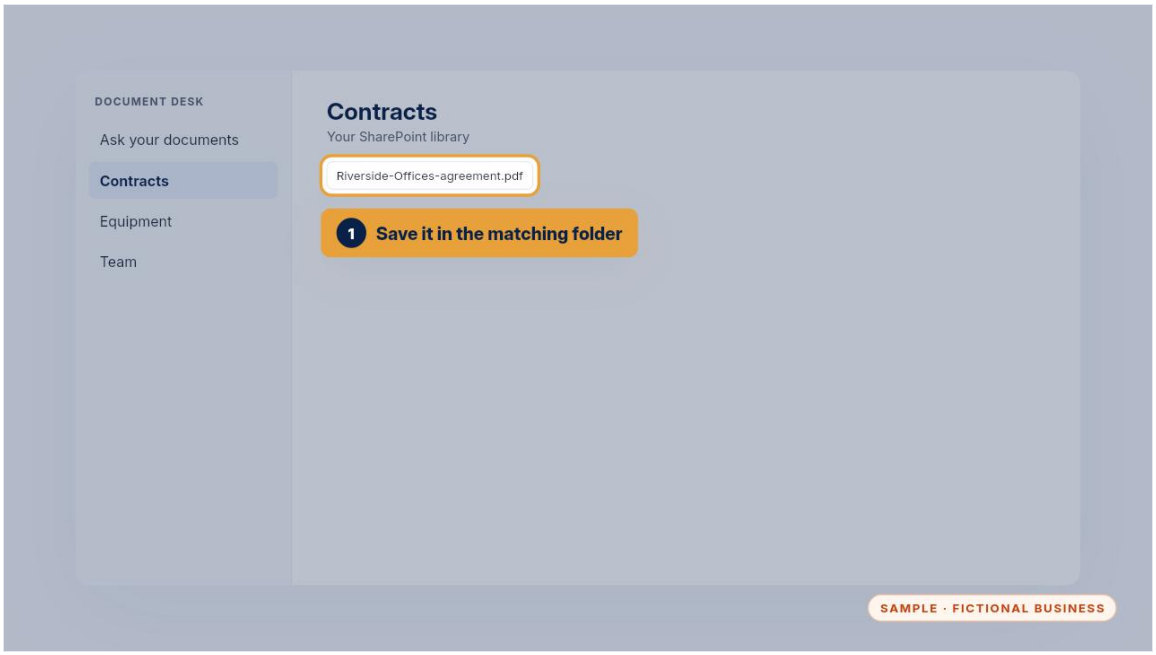
How do I add a new document?

Save a new document where the assistant can read it, then check it answers from it.

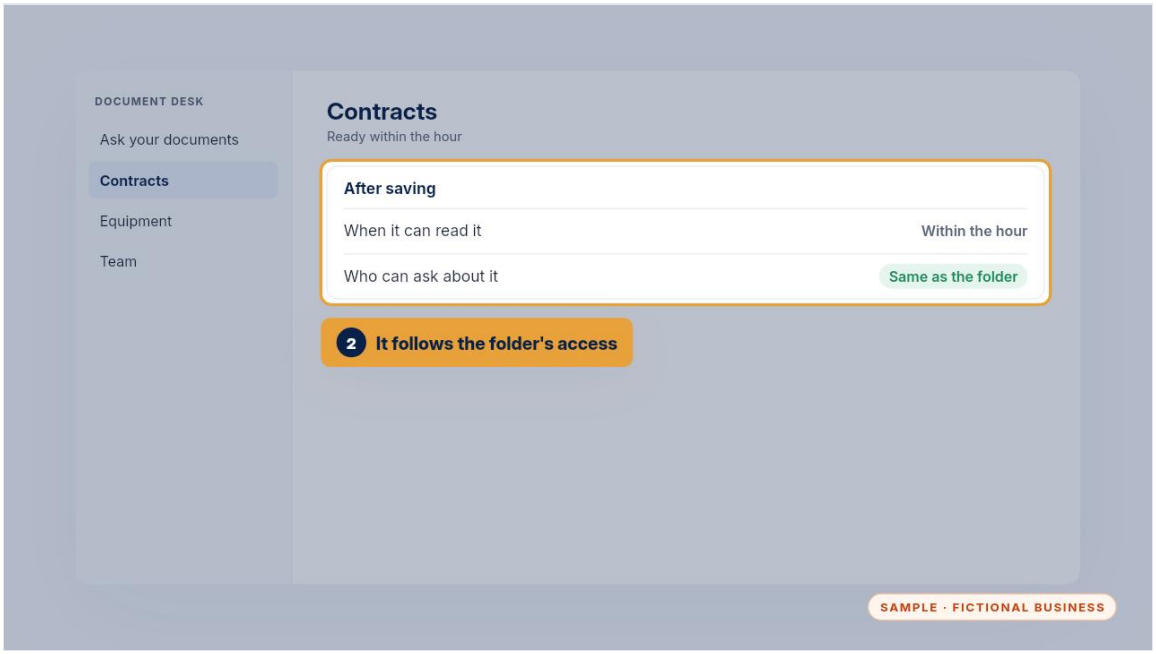
Watch the narrated video: https://openarmsolutions.com/guides/document-desk/add-a-new-document



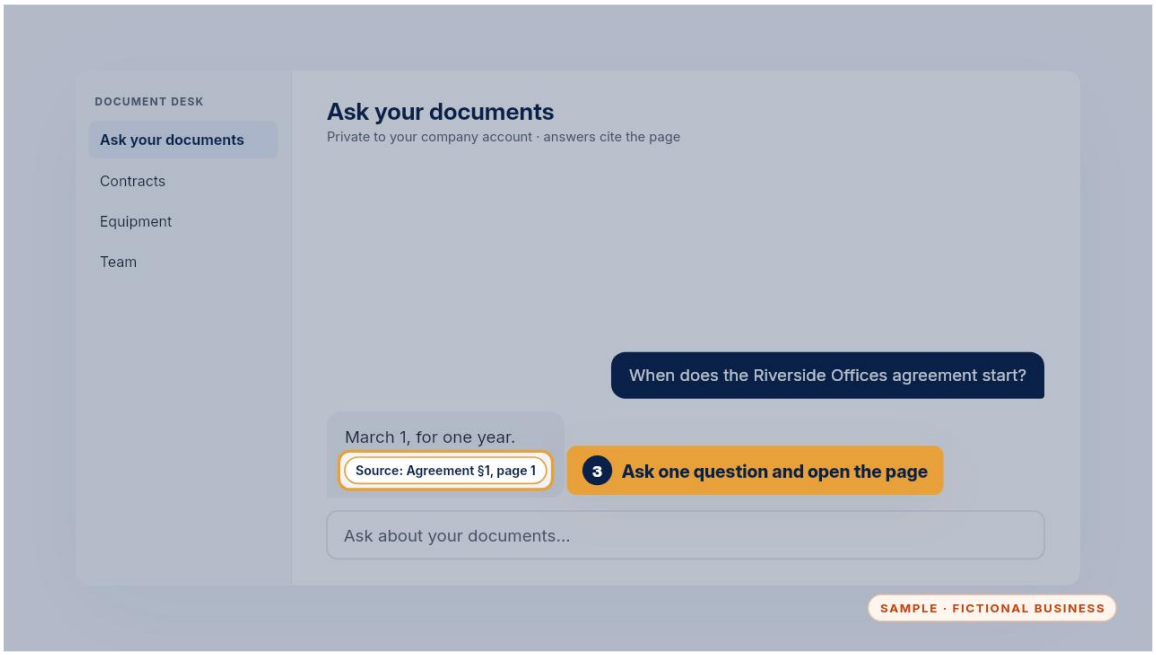
1 Here's how to add a new document so the assistant can answer from it.



2 Save the file in the folder for its kind of document. A new service agreement goes in Contracts, with a clear name: what it is, who it's with, and the date.



3 In the sample setup, Copilot can read it within the hour. Only people who can open that folder can ask about it.



4 Then ask one question only the new file answers, and open the page it cites.

Remember

1. The right folder
2. A clear file name
3. One test question

SAMPLE · FICTIONAL BUSINESS

5 Right folder, clear name, one test question.