CHAT WITH YOUR DOCUMENTS · HANDOFF PACK

Ask your documents and get the page it came from.

Built for Parkside Accounting. A private assistant that reads your engagement letters, checklists and handbook and cites the page, inside your own Microsoft account.

01 Your setup at a glance
02 What it can read
03 Test report: 25 question test
04 Ownership & access
05 30-day results
06 Keeping it current

Parkside Accounting

Prepared by Open Arm Solutions · Delivered October 2026

SAMPLE

01 · YOUR SETUP AT A GLANCE

Your documents now answer questions, with the page cited.

A private assistant that reads your engagement letters, checklists and handbook and cites the page, inside your own Microsoft account.

312	4	2	96%
Documents it can read	Document sets	Access groups	Test answers right first time

Where it's set up

TOOL	WHO USES IT	WHAT IT DOES	STATUS	LAST UPDATED
Microsoft 365 Copilot	Owner, office team	Answers questions with the page cited	Live	Nov 3, 2026
SharePoint document library	Office team	Holds the documents it reads, in your account	Live	Nov 3, 2026
Access groups	Owner	Office sees letters and checklists; owner also sees HR files	Live	Nov 3, 2026

Document map last updated Nov 3, 2026.

How it works

01 **Documents in your folders**
In your own account; you choose which

→

02 **Ask in plain words**
No file names or clause numbers

→

03 **Answer cites the page**
Or says it can't find it

→

04 **A person decides**
Check the page, then act

Start using it today

1. Ask a document question
Open Copilot in Microsoft 365.

2. Add a document
Save it to the right SharePoint folder.

3. Change who sees what
Text us who needs access.

02 · WHAT IT CAN READ

Your documents, mapped and kept private.

Each set of documents says what's in it, an example answer, and when it won't answer.

Client engagement letters

WHAT'S IN IT

41 engagement letters with the work covered, fees and renewal dates.

EXAMPLE ANSWER

"The Oakridge Dental engagement letter renews on January 1, with 30 days' notice to end it (section 6, page 3)."

IT WON'T ANSWER WHEN

The question needs a legal opinion. It says so and points to the clause.

NEVER SAY

A legal opinion on a clause. Only what it says and where.

IRS publications and checklists

WHAT'S IN IT

214 IRS publications, state guides and your own checklists.

EXAMPLE ANSWER

"The S corp checklist asks for last year's return first (S corp checklist, page 1)."

IT WON'T ANSWER WHEN

The answer isn't in the library: it says it can't find it, never guesses.

NEVER SAY

A tax rule that isn't in the library, or advice on a client's case.

Also inside: Employee handbook, Vendor contracts.

03 · TEST REPORT

We asked it 25 questions about your own documents.

Every answer was checked against the page it cites. 24 passed on the first run; the question that missed was fixed and re-tested.

25	24	1	96%
Questions tested	Passed first time	Fixed & re-tested	First-run pass rate

QUESTION ASKED	ANSWER GIVEN	PAGE CITED	RESULT
Who signed the Riverside Offices letter?	First run named the wrong page. Now: the managing partner, p.4.	Letter p.4	Fixed
When does the Oakridge Dental letter renew?	January 1; 30 days' notice to end it.	Letter §6, p.3	Pass
What's the monthly fee for Westfield Florist?	$450 for bookkeeping and payroll.	Letter §3, p.2	Pass
Does the Pine Street Bakery letter include tax returns?	Yes: the business return and both owners' returns.	Letter §2, p.1	Pass
Which letters renew next quarter?	Listed 6, each with its renewal date.	6 letters	Pass
Does the Harbor Lofts letter cover IRS letters?	No; billed hourly at $175.	Letter §5, p.3	Pass

Showing 6 of 25, misses first. Every row is in your test report and your portal.

Results by topic



03 · DATA-HANDLING SHEET

What it can read, where it's kept, who can see it.

Everything stays in your own account, under its data terms. We keep only what's in your client portal, and delete it within 30 days after you ask us to or your care plan ends.

WHAT IT CAN READ	WHERE IT'S KEPT	WHO CAN SEE IT	KEPT FOR
Engagement letters (41)	Your SharePoint › Clients	Owner, office team	As long as you keep them
Publications and checklists (214)	Your SharePoint › Reference	Everyone at Parkside	As long as you keep them
Handbook and policies	Your SharePoint › Team	Everyone at Parkside	As long as you keep them
HR files	Your SharePoint › HR (restricted)	Owner only	As long as you keep them
Questions and answers	Your Microsoft 365 account	The person who asked	Under your Microsoft settings
Files you sent us	Our secure storage	Our team	Deleted 90 days after delivery
Your client portal	Our secure storage	You and our team	Until you ask us to close it or your care plan ends, then deleted within 30 days

More test results

QUESTION ASKED	ANSWER GIVEN	PAGE CITED	RESULT
Can we raise fees mid-year for Elm Court?	Only with 30 days' written notice.	Letter §7, p.3	Pass
What's the late-payment fee in our standard letter?	1.5% a month after 30 days.	Template §8, p.4	Pass
What does the S corp checklist ask for first?	Last year's return and the basis worksheet.	S corp checklist, p.1	Pass

QUESTION ASKED	ANSWER GIVEN	PAGE CITED	RESULT
What does a new client bring?	Photo ID, last year's return and this year's tax forms.	New client checklist, p.1	Pass
What's our cutoff for documents before April 15?	March 15; later documents go on extension.	Tax-season procedures, p.2	Pass
What's on the year-end payroll checklist?	W-2s and W-3, filed by January 31.	Payroll checklist, p.3	Pass

04 · OWNERSHIP & ACCESS

Your accounts and files are yours: each one, who owns it, and where it lives.

Every account is in your name. We have helper access only, and you can remove it any time without breaking anything.

WHAT	ACCOUNT OWNER	OUR ACCESS	WHERE TO FIND IT
Document library	Parkside (Microsoft 365)	Member, removable	SharePoint › Parkside Documents
Copilot licences	Parkside, billed by Microsoft	None	Microsoft 365 admin › Licences
Access groups	Parkside (owner is admin)	None	Microsoft 365 admin › Groups
Document map and test questions	Parkside	None	Portal › Files
Data-handling sheet	Parkside	None	Portal › Files
Editable copies (Word, Google Docs)	Parkside	None	Portal › Files

Every file we handed over

FILE	FORMAT	WHERE IT IS
Document map	PDF + Word	Portal › Files
Data-handling sheet	PDF	Portal › Files

Also yours: the handoff pack, the test report, this sheet and the 30-day results report, each as a PDF and an editable Word file, in your portal.

If you ever leave

Everything keeps working. Remove our access where it says "removable". We delete our working copies 30 days after your plan ends.

Who to contact

hello@openarmsolutions.com or text (954) 821-2598. We usually reply the same business day.

05 · 30-DAY RESULTS

Your first month with Chat With Your Documents.

Illustrative numbers for a sample business. Your real report is built from your own logs 30 days after launch.

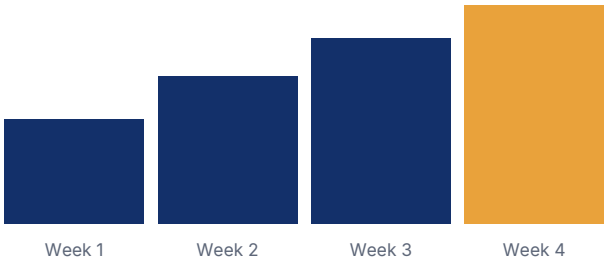
138
Questions asked

94%
Answers with a page cited

6
Renewals caught early

12
New checklists added

Questions per week



What people asked

Checklists and procedures	41
IRS publications	36
Engagement letter renewals	24
Handbook questions	19

What we changed & next month's plan

Added
12 new year-end checklists and state guides.

Updated
Two engagement letters renewed with new fees.

Next
A monthly list of letters renewing in the next 90 days.

06 · KEEPING IT CURRENT

When something changes, it changes everywhere.

When prices, hours, services or policies change, these three steps keep every answer right.

MONTHLY MANAGEMENT

Active · renews Dec 2

Price and policy updates, fixes, and a monthly check with a short report. Text or email any change.

To request a change

1. **Text or email us** at (954) 821-2598 or hello@openarmsolutions.com: what changed and from when.
2. **We update it once** and every tool gets the new answer. On Monthly Management, small changes are included.
3. **We confirm** by reply, with the questions we re-tested.

How-to guides

Ask a document question · 2 min

1. Open Copilot in Microsoft 365. 2. Ask in plain words. 3. Open the cited page to check.

Add a document · 1 min

1. Save it to the right SharePoint folder. 2. Copilot can read it within the hour. 3. Restricted folders stay restricted.

Change who sees what · 2 min

1. Text us who needs access. 2. We update the group. 3. We re-test one question as that person.

Where things stand

STEP	DETAIL	STATUS
Setup questionnaire	Received Sep 24	Done
Documents mapped & 25 questions tested	Tested before handoff	Done
Copilot switched on	Live Oct 2	Done
30-day results report	Sent Nov 3	Done