DOCUMENT DESK · HANDOFF PACK

Ask your documents and get the page it came from.

Built for Brightline Heating & Air. A private assistant that reads your contracts, manuals and handbook and answers with the page it came from, 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

Brightline Heating & Air

Prepared by Open Arm Solutions · Delivered October 2026

SAMPLE · FICTIONAL BUSINESS

01 · YOUR SETUP AT A GLANCE

Your documents now answer questions, with the page cited.

A private assistant that reads your contracts, manuals and handbook and answers with the page it came from, 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 contracts and manuals; owner also sees HR files	Live	Nov 3, 2026

Document map last updated Nov 3, 2026.

How it connects

Document Desk
Set up once, in your accounts

→

- **Microsoft 365 Copilot**
- **SharePoint document library**
- **Access groups**

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.

Commercial service agreements

WHAT'S IN IT

41 agreements with response times, visit schedules, renewal dates and prices.

EXAMPLE ANSWER

"The Oakridge Plaza agreement renews on June 1 with 60 days' notice to cancel (section 9, page 4)."

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.

Equipment manuals and warranties

WHAT'S IN IT

214 manuals and warranty registrations for the brands you install.

EXAMPLE ANSWER

"The Trane XR16 compressor has a 10-year limited warranty when registered within 60 days (warranty card, page 2)."

IT WON'T ANSWER WHEN

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

NEVER SAY

A warranty term for a model that isn't in the library.

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 agreement?	First run named the wrong page. Now: the facilities manager, p.6.	Agreement p.6	Fixed
When does the Oakridge Plaza agreement renew?	June 1; 60 days' notice to cancel.	Agreement §9, p.4	Pass
What's our response time for Westfield Dental?	4 hours on business days, next morning otherwise.	Agreement §3, p.2	Pass
How many visits a year does Pine Street get?	Two: spring and fall.	Agreement §2, p.1	Pass
Which agreements renew next quarter?	Listed 6, each with its renewal date.	6 agreements	Pass
Does the Harbor Lofts agreement cover parts?	No, labor only; parts at 10% off.	Agreement §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
Service agreements (41)	Your SharePoint › Contracts	Owner, office team	As long as you keep them
Manuals and warranties (214)	Your SharePoint › Equipment	Everyone at Brightline	As long as you keep them
Handbook and policies	Your SharePoint › Team	Everyone at Brightline	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 prices mid-term for Elm Court?	Only with 30 days' written notice.	Agreement §7, p.3	Pass
What's the late-payment fee in our standard agreement?	1.5% a month after 30 days.	Template §8, p.4	Pass
Trane XR16 compressor warranty?	10 years limited, if registered within 60 days.	Warranty card, p.2	Pass

QUESTION ASKED	ANSWER GIVEN	PAGE CITED	RESULT
Goodman furnace filter size, model GMVC96?	16x25x1 or as listed for the cabinet.	Manual, p.18	Pass
Carrier Infinity error code 34?	Ignition proving failure; checks listed.	Manual, p.41	Pass
Required clearance for the outdoor unit?	12 inches on the sides, 60 above.	Manual, p.7	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	Brightline (Microsoft 365)	Member, removable	SharePoint › Brightline Documents
Copilot licences	Brightline, billed by Microsoft	None	Microsoft 365 admin › Licences
Access groups	Brightline (owner is admin)	None	Microsoft 365 admin › Groups
Document map and test questions	Brightline	None	Portal › Files
Data-handling sheet	Brightline	None	Portal › Files
Editable copies (Word, Google Docs)	Brightline	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 your portal within 30 days of your request or plan ending.

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 Document Desk.

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

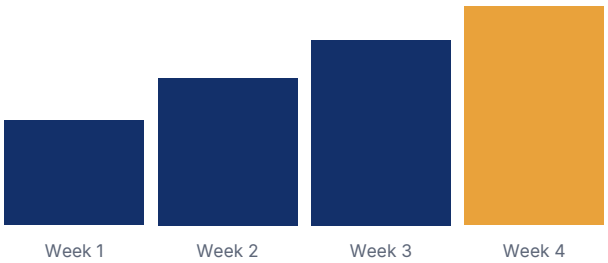
138
Questions asked

94%
Answers with a page cited

6
Renewals caught early

12
New manuals added

Questions per week



What people asked

Warranty terms	41
Error codes and specs	36
Agreement renewals	24
Handbook questions	19

What we changed & next month's plan

Added
12 new manuals for the new furnace line.

Updated
Two agreements renewed with new prices.

Next
A monthly list of agreements 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.

KEEP IT RUNNING

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 Keep It Running, 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