AI AND AUTOMATION

Teach the assistant your company's rules

Write a short note about how your company works, publish it, and the help assistant answers from it.

Every company has its own rules: when the warehouse stops receiving, who approves large payments, which customers take deliveries at the back door. Write each one down once as a note, and BeanDish's help assistant answers questions from it and tells you which note it used.

Before you start

AI must be switched on for your company under **Settings › AI**.

Write a note

1. Open **Automation › Memory** and click **New note**.
2. Give it a **Title** that names the fact, such as *Main DC receiving cut-off*.
3. Choose a **Kind**: a fact, a policy, a procedure, a preference or a reference.
4. Write the **Summary** as the answer in one line. This is what the assistant reads first to decide whether the note answers a question.
5. Write the **Note** itself in plain words. One fact per note works best. You can link to another note with its title in double square brackets, such as [[Customers with unusual shipping terms]].
6. Click **Create note**. A new note starts as a draft.
7. Click **Publish**. Only published notes reach the assistant.
8. Click **Pin** for the notes that matter most, so the assistant always has them in mind.

Ask the assistant

1. Click the help button in the bottom-right corner of any page.
2. Ask your question in plain words. The answer lists the notes it used under **Based on your company's notes**.

3. If an answer is worth keeping, click **Remember this**. BeanDish drafts a note from it for you to check and save. Nothing is saved without a person.

Good to know

- Every change to a note is kept in its **History**, so you can see or restore what it said before.
- The assistant cannot see your invoices, balances or customers. It answers how-to questions and from the notes you write.
