

Documents Manual

A review-first guide to uploading files and checking extracted information in Dolen Intelligence.

What Documents is for

Documents is a staging area for files you want to review. It can help organize receipts, client notes, CSVs, spreadsheets, screenshots, forms, PDFs, and manual data-entry batches.

The workspace is designed to analyze and stage information for review before any next manual action.

Important: Documents does not automatically send, export, delete, or alter your original document.

Upload a file

Use the upload area to choose a file, or drag a file into the area.

Upload one clear, relevant file at a time when you need the cleanest review result.

For photos or screenshots, make sure text is readable and the whole document is visible.

Review the staged result

After analysis, inspect the suggested document type, routing, fields, totals, dates, and any warnings.

If an item shows **Needs review**, it is waiting for a person to check it. Read the preview and compare it to the original file.

When a total, date, name, or field is missing, confirm it manually rather than guessing.

Important: Analysis can be wrong or incomplete. Treat extracted data as a draft until you verify it.

Confirm the next manual action

Use the review confirmation only after you have checked the staged output.

If a file is unclear, upload a clearer copy or keep it in the review queue until you can verify it.

Use the resulting information only in the workspace where it belongs, such as saving verified lead information in Leads.

Privacy and safe handling

Do not use public testing for customer identity documents, credit information, banking documents, passwords, or other highly sensitive files.

Keep the original file until you have confirmed the information you need.

If you are unsure whether a file is appropriate to upload, leave it out and ask an owner or administrator first.

Important: The purpose of this area is safe organization and review, not automatic document processing.