Add company and product documents to alby

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The more information alby has on your products and website, the more accurate its responses to customers can be.

To give alby information to help customers, you can import supplemental documentation about your products, such as sizing guides, warranty information, and return policies.

Documents can include overarching topics such as return policies, loyalty information, and financing guidelines. They can also be specific to different categories or products and include sizing guides, blog articles, assembly instructions, and ingredient lists.

Categorization

Categorizing documents provides added context to alby about how and when to reference them in customer interactions. You can assign multiple categories to each document.

A document must be given at least one category before it can be used in alby responses.

For example, if a customer asks "How do I care for this product?" alby may include information from a document tagged with the Care category in its response.

Below are the categories you can choose from and the types of documents they should include.

Category	What it's used for
Care	How to best take care of the product(s)
Ingredients	Document contains ingredients details, whether it's in list form, plain text or table
Instructions	Step-by-step guidance on how to use the product effectively
Product Snapshot	Brief overview including key features, benefits, and specifications
Return policy	Details about return eligibility, timeframe, and process
Sizing guide	Dimensions, measurements, or size chart information
Transcript	Text version of any audio or video content related to the product
Warranty	Coverage details, duration, and claim process information
Other	Default; no other category fits this document

Assign documents to products

You can assign documents to all products in your catalog, specific categories, or individual products. For

example, if a sizing guide applies to your entire catalog, assign it to all products.

> Documents won't appear in alby responses until you assign them to specific products or categories, even those intended for your entire catalog.

How to upload documents

Self-serve upload

Specifications

Any document uploaded to alby must be smaller than 5 MB.

Documents must be in one of the following formats:
- HTML
- PDF
- TXT
- DOCX

How to upload document data

To upload your documents to alby, follow these steps:

1. Navigate to **Knowledge > Documents**. The Documents page displays a list of previously uploaded documents.

2. Click **Add Documents > Upload Files**. You're prompted to find a file in your file directory to upload.

3. After uploading a file, categorize the document and assign it to relevant products. To do this, click the document name once processing is complete.

Import from a public URL

You can provide a publicly accessible URL for alby to scrape and extract information from. When adding a URL, include the complete address with HTTPS or HTTP.

> alby will only capture text content from the webpage and cannot extract information from images.

1. Click the **Knowledge > Documents**. The Documents page displays a list of previously uploaded documents.

2. Click **Add Documents > Import from URL**. You're prompted to type in a URL for alby to extract information from.

3. Once the document finishes importing, click the new document to add categories and assign it to any relevant products.

Automatic refreshes

You can configure alby to automatically re-sync your documents weekly.

For example, if you upload your terms and conditions URL with automatic updates enabled, any changes to that document will sync automatically.

To enable automatic updates for URLs, select Keep this updated automatically in the document details page. The system will update the document weekly on the same day and time you first uploaded it.

You can also manually refresh a document instead of waiting for the automatic update. To do this, click **Refresh**.

Import via SFTP

For uploading via SFTP instructions, see Add company and product documents via SFTP in the alby developer docs.