

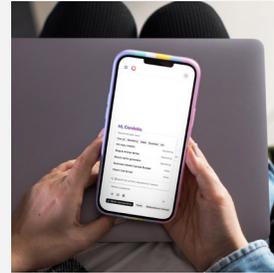
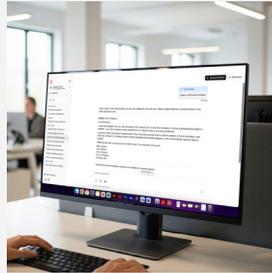


**Beginner-friendly
tutorial**

**No technical
background
required**

Powered by Querix

**A STEP-BY- STEP
BEGINNER TUTORIAL**



Getting Started with Querix

**A TACTICAL ONBOARDING
PLAYBOOK: BUILDING AND USING
AI AGENTS WITH CONFIDENCE**

Learn how to navigate Querix, set up your workspace, create agents, run tasks, and use the platform in your daily work.

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Welcome to Querix

QUERIX IS A PLATFORM THAT HELPS YOU CREATE AND USE AI ASSISTANTS POWERED BY YOUR OWN DOCUMENTS AND KNOWLEDGE — WITHOUT WRITING CODE.

This guide is an offline onboarding tutorial designed for new users discovering the platform for the first time.

In this guide, you'll learn how to:

- **Navigate the Querix platform**
- **Create and manage workspaces**
- **Upload and organize documents**
- **Create AI agents**
- **Run tasks and actions**
- **Use Querix confidently in your day-to-day work**

By the end, you should feel comfortable using Querix as part of your regular workflow.

From the website to your Querix account

YOUR JOURNEY WITH QUERIX STARTS ON THE WEBSITE.



Step 1

SIGN UP

- Go to the Querix website
- Click Sign up
- Create your user account



Create your account

To continue with Querix, set a password.

OR

Email *

Password *

Well done!

I accept the [privacy policy](#) and the [legal notice](#) *

Already have an account? [Log in](#)



Log in

Enter your login details

OR

Email *

Password *

[I forgot my password](#)

Don't have an account? [Sign up](#)



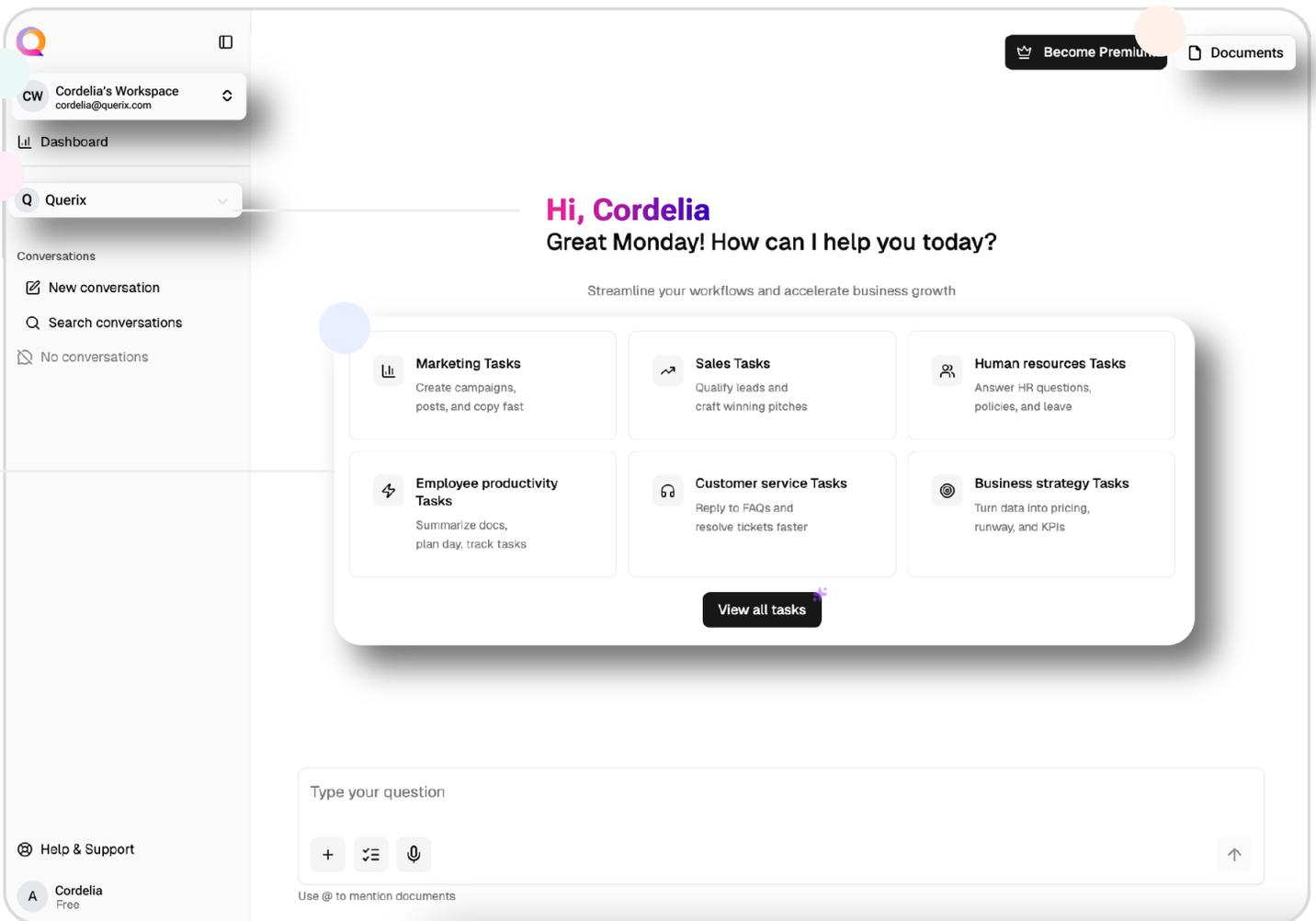
Step 2

LOG IN

- Access Querix using your credentials
- You'll arrive at the main platform interface

Navegating the Querix interface

WHEN YOU LOG IN, YOU'LL SEE THE MAIN QUERIX INTERFACE ORGANIZED AROUND FOUR CORE PILLARS:



Take a moment to explore the navigation menu.

Use the sidebar to explore these sections step-by-step.

You don't need to understand everything yet, this guide will walk you through it step by step.



Workspaces (What&Why)

WHAT IS A WORKSPACE?

A Workspace is the main environment where you organize your work in Querix.

THINK OF A
WORKSPACE AS:

- A specific project
- A department
- Or a use case

EACH WORKSPACE ACTS
AS A SILO CONTAINING:

- Documents
- Assistants
- Tasks

WHEN SHOULD YOU CREATE
A NEW WORKSPACE?

- When working on a new project
- When separating internal vs customer-facing use cases
- When different teams need different knowledge

Creating and managing workspaces

HOW TO CREATE A WORKSPACE

Step 1

Click create workspace

Step 2

Give it a clear name

Step 3

Open the workspace

The screenshot illustrates the process of creating a workspace in the Querix application. It is divided into three steps:

- Step 1:** A pink callout bubble highlights the '+ Create workspace' button in the left sidebar.
- Step 2:** A teal callout bubble highlights the 'Test' input field in the 'Select or create a new workspace' dialog box.
- Step 3:** An orange callout bubble highlights the 'Test Workspace' selection in the workspace list, which is marked with a green checkmark.

The interface includes a top navigation bar with 'Become Premium' and 'Documents' buttons. The main content area displays a greeting: 'Hi, Cordelia' and 'How can I help you today?' with the tagline 'Streamline your workflows and accelerate business growth'. The bottom section features a 'Type your question' input field with icons for adding attachments, lists, and voice recording.

You can create multiple workspaces to separate internal data and switch between them at any time.

Documents & Knowledge

(What they do)

 Documents

DOCUMENTS: THE KNOWLEDGE BEHIND YOUR AGENTS

Documents are the power source for Querix agents.
This includes:

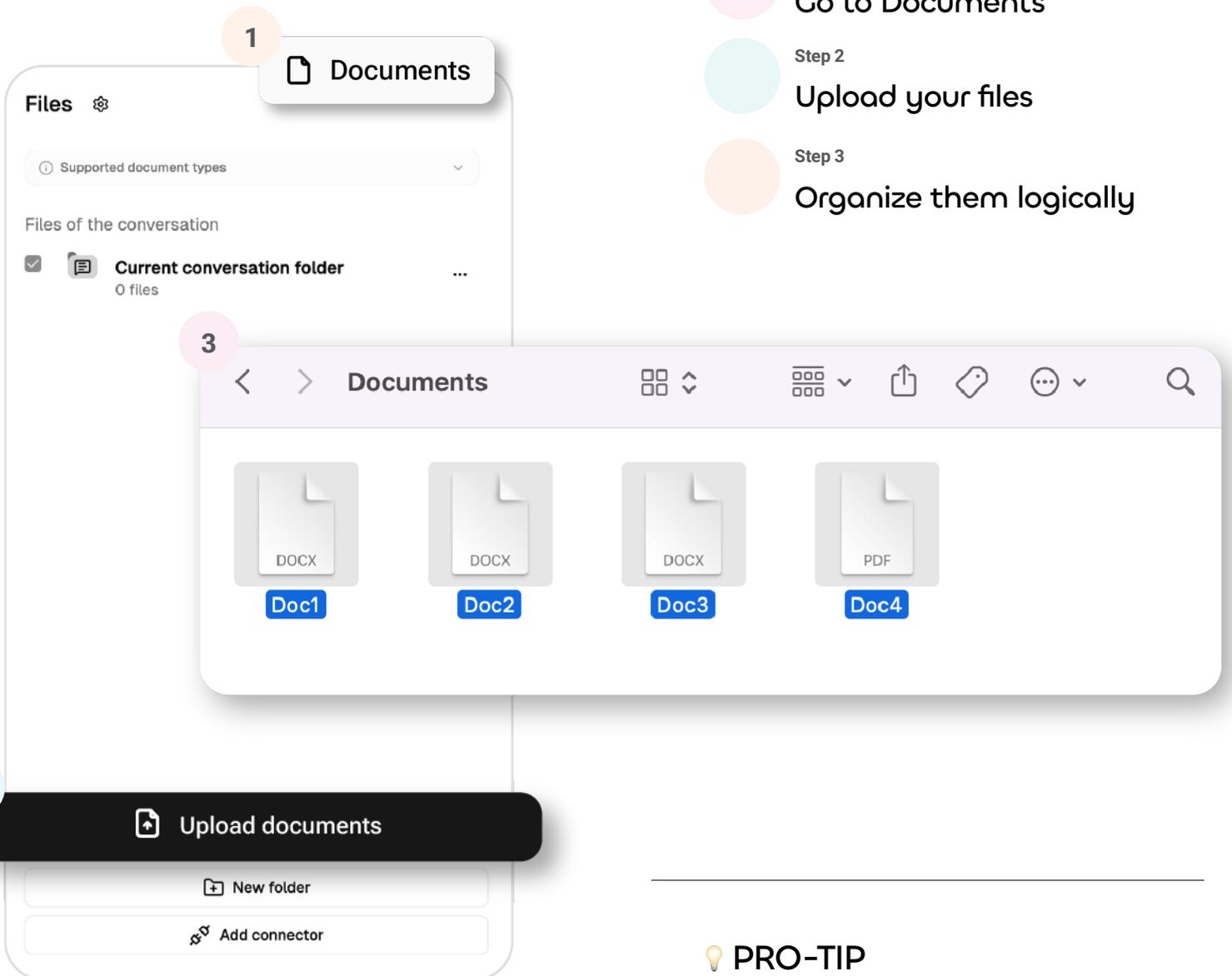


Querix uses these documents to generate accurate, grounded answers.
You don't need to train a complex model, you simply upload the knowledge.

Uploading and organizing documents

HOW TO UPLOAD DOCUMENTS

- Step 1
Go to Documents
- Step 2
Upload your files
- Step 3
Organize them logically



PRO-TIP

Start with high-quality, up-to-date documents.

Clear documents lead to better agent responses.

Assistants

(What they are)

Q Querix

WHAT IS AN ASSISTANTS IN QUERIX?

An Assistant is an AI tool assigned to use your specific documents to answer questions or perform tasks.

Assistants can be:

- Internal (for employees)
- External (for customers)

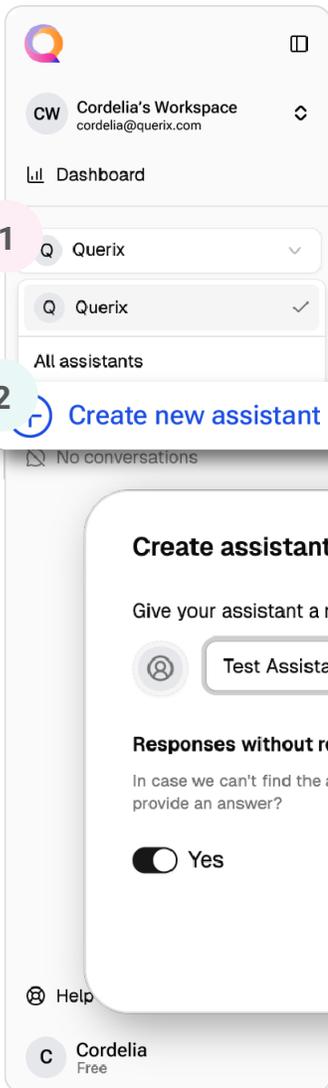
Each assistant:

- Uses only selected documents
- Works inside a workspace
- Can run tasks and actions

The screenshot displays the Querix Assistants interface. On the left is a sidebar with the following elements: a logo, 'Test Workspace cordelia@querix.com', 'Dashboard', a 'Querix' dropdown menu, 'Conversations' section with 'New conversation', 'Search conversations', and 'No conversations', 'Help & Support', and a user profile 'C Cordelia Free'. The main content area shows the breadcrumb 'Querix > Assistants', a 'Become Premium' button, and the heading 'Choose an assistant to interact or create a new one'. Below this is a search bar 'Search assistants...' and three assistant cards: 'Create assistant' (Build a custom AI assistant in minutes), 'Querix' (No files), and 'Test Assistant' (No files).

Creating your first assistant

HOW TO CREATE AN ASSISTANT



Step 1
Go to the assistants

Step 2
Click create assistant

Step 3
Choose the documents it should use

Step 4
Give it a clear purpose
Example:

“This agent helps answer internal HR questions.”

You can also deploy specialized assistants for Sales, Marketing, or Business Strategy.

This agent helps answer internal HR questions.

3



Task & Actions

(What & when)

WHAT ARE TASKS?

Tasks allow agents to perform specific actions, not just chat.

 <p>Marketing Tasks Create campaigns, posts, and copy fast</p>	 <p>Sales Tasks Qualify leads and craft winning pitches</p>
<p> See how to run Marketing Tasks</p>	<p> See how to run Sales Tasks</p>
 <p>Human resources Tasks Answer HR questions, policies, and leave</p>	 <p>Employee productivity Tasks Summarize docs, plan day, track tasks</p>
<p> See how to run Human Resources Tasks</p>	<p> See how to run Employee Productivity Tasks</p>
 <p>Customer service Tasks Reply to FAQs and resolve tickets faster</p>	 <p>Business strategy Tasks Turn data into pricing, runway, and KPIs</p>
<p> See how to run Customer Service Tasks</p>	<p> See how to run Business Strategy Tasks</p>

 Use tasks when you want desired outcomes:

- Structured results
- Repeatable actions
- Consistent outputs

 Examples

- Generate a summary
- Create a draft
- Answer a specific type of question or KPIs

Running your first task

HOW TO RUN A TASK

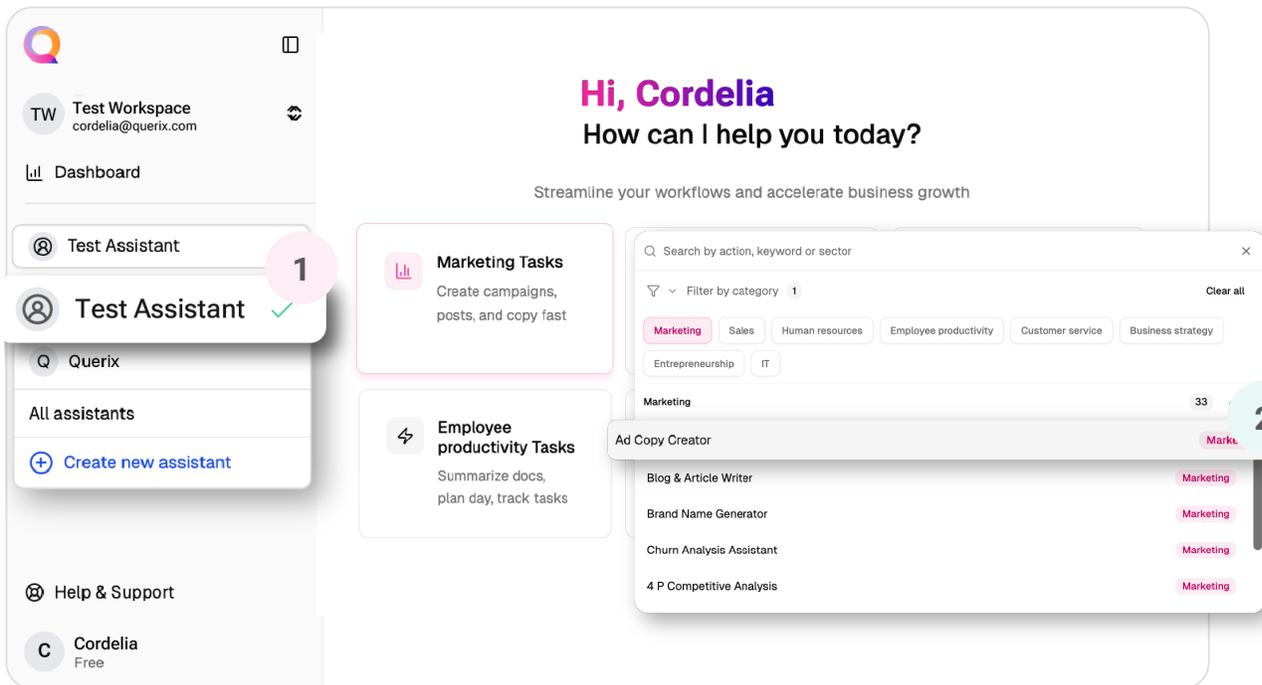
Step 1
Select an assistant

Step 2
Choose a task

Step 3
Provide the required input

Step 4
Run the task

Step 5
Review the result



3 Business Name: Querix; Product: AI; Target: Employees



Boost Workplace Success with Querix AI!

Empower your daily workflow with **Querix AI**—your intelligent assistant at work! Say goodbye to repetitive tasks and hello to smarter solutions. Querix AI seamlessly integrates with your processes, helping you:

- Automate routine work
- Find information instantly
- Collaborate more efficiently
- Make data-driven decisions. Join innovative teams who are already transforming their productivity with Querix AI. Unlock more time, reduce stress, and get things done faster—so you can focus on what truly matters.

Ready to revolutionize your workday? Visit [yourwebsite.com] or contact us at (123) 456-7890 to get started.

Querix AI: Empowering Employees. Enabling Excellence.

Would you like to highlight any special features or benefits? Share more details, and I can refine your ad even further!

Suggestions to continue 4

Experimental



Today, 02:12 PM

→ Efficiency, standardizing your work through tasks saves time and ensures quality.

Pre-prompts & usage tips

WHAT ARE PRE-PROMPTS?

Pre-prompts define how an agent should behave:



You can define

Tone



You can define

Style



You can define

Level of detail

Good pre-prompts help agents deliver better, more consistent results.

Give the agent a **Role** (e.g., "Customer Assistant"), a Context, and a Format for its answers.



PRO-TIP:
Start simple. Improve over time as you learn how you use Querix daily.

API & Integrations

(High level)

DO I NEED THE API?

Most users do not need the API initially to get value from Querix.

THE API IS
USEFUL WHEN



Integrating Querix into other systems

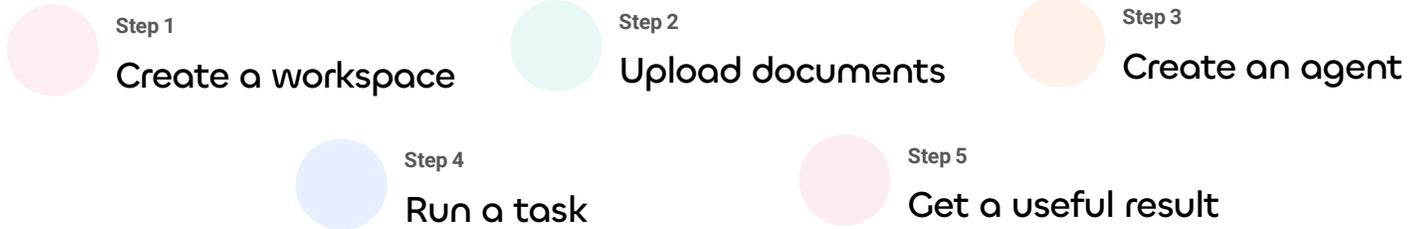


Automating workflows

You can safely ignore this at the beginning and focus on core features.

Your first complete use case

A SIMPLE END-TO-END EXAMPLE



1 Select or create a new workspace

2 Upload documents

3 Create assistant

4 Search by action, keyword or sector

5 Here's a summary of the support ticket:

- **Client:** San Roque Veterinary Clinic\n- **User:** Laura Martínez\n- **Date:** 02/10/2026\n**Issue:** Laura Martinez is unable to access certain patients' medical records; attempting to do so displays an "Error loading data" message.

Context:

- The issue started after a platform update performed the previous night.
- Other functionalities like calendar and billing are unaffected.

Actions Taken:

- User was advised to log out and log back in.
- Problem is limited to records for patients created before January 2025.
- The ticket has been escalated to the technical team for further investigation.

Current Status:
Incident is currently under analysis by the development team; resolution is pending.
If you need the summary in a different format or with additional details, let me know!

Suggestions to continue 4 Experimental

Today, 11:44 AM

→ This is the basic flow you'll repeat for most use cases in Querix.

Brest Practices

GETTING THE MOST VALUE FROM QUERIX

Maintenance:



Keep documents updated



Use clear workspace names



Start with simple agents

Interaction:



Improve prompts gradually



Review agent answers regularly

What's next

WHERE TO GO FROM HERE

Now that you know the basics, you can:



Create more assistants



Explore advanced use cases



Add more documents



Integrate Querix into daily workflow

The platform is designed to evolve as your business needs grow.

You're ready to use Querix

YOU NOW UNDERSTAND



How Querix works

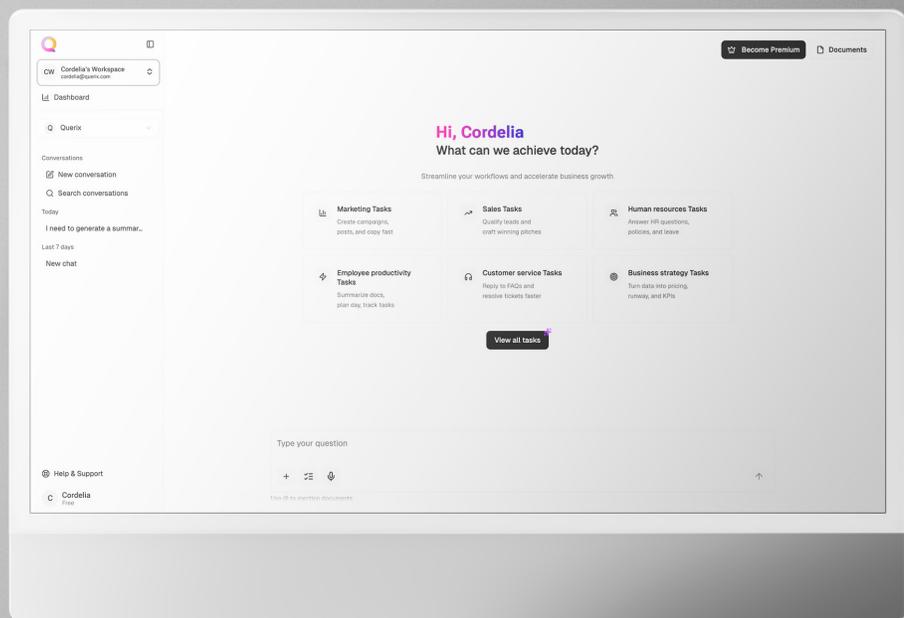


How to navigate the platform



How to create workspaces, agents, and tasks

Start small, iterate, and build your confidence one task at a time.



Welcome to Querix.