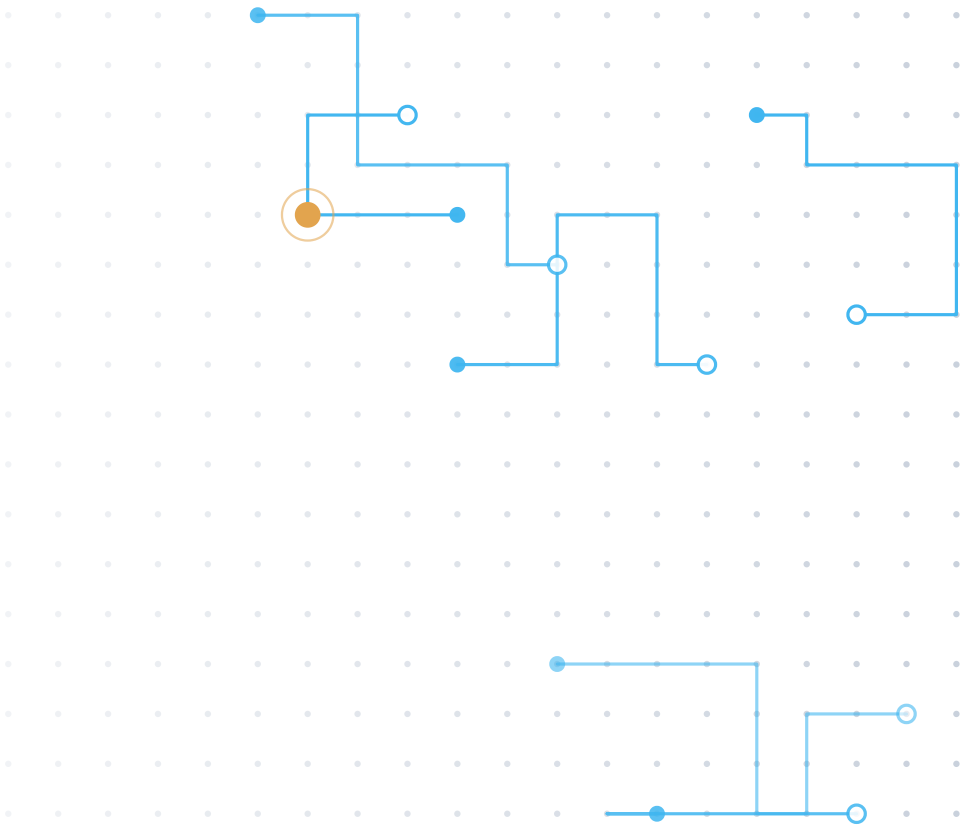


PRACTICAL GUIDE

Your business in plain-text notes: the knowledge base your AI reads

Write down once how your business works and any AI can work with it, today and five years from now

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FOR
business owners and operations leads

READING
8 min

EDITION
v2.0 · November 2026

BEFORE YOU START

What you will get from this guide

01 Know what to write down before you connect any AI tool.

02 Organise what your business knows into a map and one page per topic.

03 Keep what your team knows apart from what changes every day.

04 Keep the knowledge base current with fifteen minutes a week.

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08 Checklist

For: business owners and operations leads · 8 min read

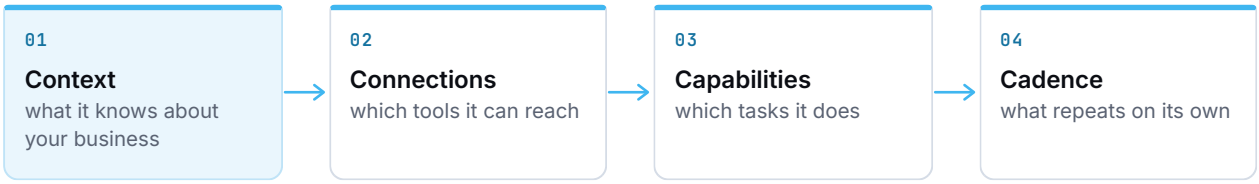
01 An agent only knows what it can read

Picture a new hire on their first day. They are sharp and keen, but nobody has handed them the manual. They do not know the prices, which customers get special treatment, or that you close early on Fridays. So they will ask a lot or, worse, they will guess. An AI agent is in exactly that position every time it starts work.

A language model knows a great deal about the world and nothing about *your* business. If something is not written down where it can read it, the model has two options: make it up or ask. That is why, when an AI system gives weak answers, the problem is rarely the model or the way you phrased the request. It is missing context, and the fix is giving it access to what your team knows, not rewriting the prompt again and again.

I build every system in the same order:

FIGURE 1 **The order for building an AI system**



This guide covers the first step, which is the one people skip most, because connecting a new tool feels like more progress than writing down how the business works. Without context, any capability is working blind.

IN ONE LINE

Before you automate anything, write down what a new hire would need to know.

02

Plain files: yours and portable

There are two ways to store what your business knows. One is inside a platform, such as a cloud notes app. The other is **plain-text files**: simple documents that open in any editor and sit in a folder you own. The most common format is Markdown, which is ordinary text with a few marks for headings and lists. A person reads it as easily as a machine does, and that is exactly the point.
Side by side, the difference is easy to see:

TABLE 1 **Where to keep what your business knows**

	Closed platform	Plain-text files
OWNERSHIP	The vendor's, while you pay	Yours, in your folder
READ BY AI	Only with an integration	Any AI, today and later
CHANGES	Sometimes visible	History with the date of each change
MOVING OUT	Exporting, with luck	Copying the folder

The technology changes every few months; your knowledge should not have to move house each time. If you switch AI tools tomorrow, the folder stays the same. The new tool reads it from day one.

> *Your context is yours; the technology is rented.*
>
> FLOWARA AI WORKING PRINCIPLE

A *version history* (with git, for example) records every change with its date. If a new rule makes things worse, you go back to the previous version without redoing anything.

IN ONE LINE

Your knowledge should live in files you can copy, read and version without asking anyone's permission.

03

What you know and what is happening today

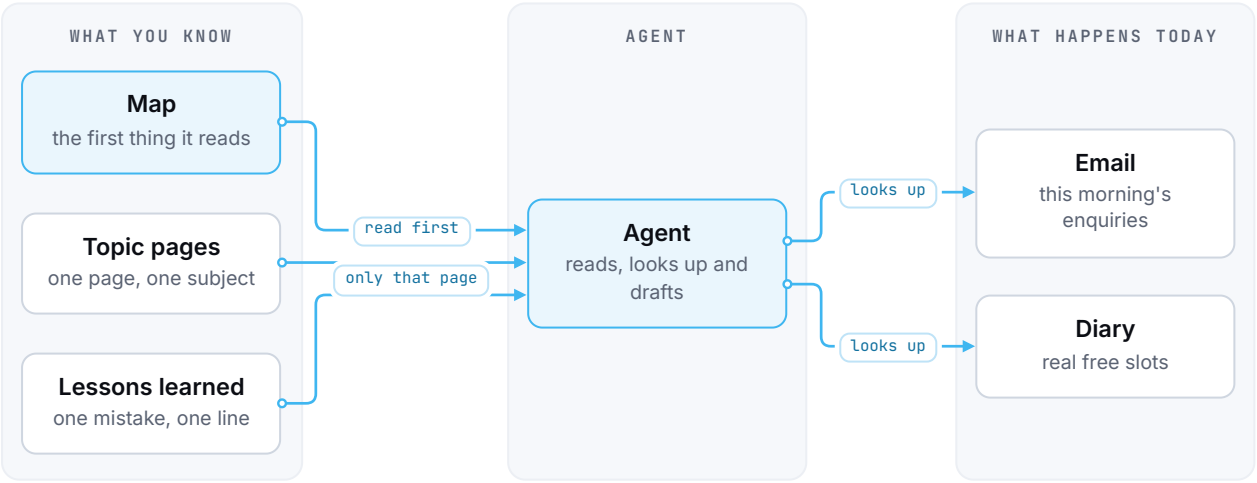
Not all context is the same. Mixing the two kinds is one of the mistakes I see most often, and it is easy to avoid once you can tell them apart:

01 **Expertise.** How you work and what you promise a customer. It changes slowly. Your team already knows it. It lives in your folder, locally.

02 **Today's situation.** The emails that came in this morning, or the free slots in the diary. It changes by the hour. It stays out of the notes and is looked up when it is needed, through a connection to the tool where it lives.

Copy the diary into a file and it will be wrong tomorrow. Leave the prices only in the owner's head and the AI will never find them. For example, your cancellation policy is expertise; today's cancellations are situation. Each has its place:

FIGURE 2 **Two kinds of context for an agent**



IN ONE LINE

Expertise is written down once; today's situation is looked up, not copied.

04

How to organise it: a map and one page per topic

A folder full of loose notes is not a knowledge base. Four pieces turn it into one:

01 **A map page.** It is the first page anyone reads. It explains nothing. It only says where each thing is and which rule applies.

02 **One page per topic.** Prices, opening hours, suppliers or tone with customers. If a page covers three subjects, it is really three pages.

03 **One fact, one line, one owner.** The price of a service appears in a single place and every other page links to it. When it changes, you replace it; you do not leave the old version under the new one.

04 **A lessons-learned file.** Every corrected mistake becomes one line: what happened, which rule stops it happening again, and since when.

This is how the map of a hair salon might start (synthetic example):

WHAT I NEED	WHERE IT IS	WHICH RULE APPLIES
Service prices	prices.md	Price with its date; no discount without the owner
Cancellations	cancellations.md	Never promise a refund without checking with the owner
Tone with customers	tone.md	First names and short sentences
Mistakes already fixed	lessons-learned.md	Read before drafting any reply

The map points the way; it is not an encyclopaedia. Keep what only your business knows and cut the rest. The AI already knows what a colour treatment is and how to write a polite email. What it does not know is that you do not do highlights on Saturdays.

File names should say what is inside: `cancellations.md` is easy to find, `misc-notes-2.md` is not. Each page also says who looks after it. A fact with no owner goes out of date without anyone noticing.

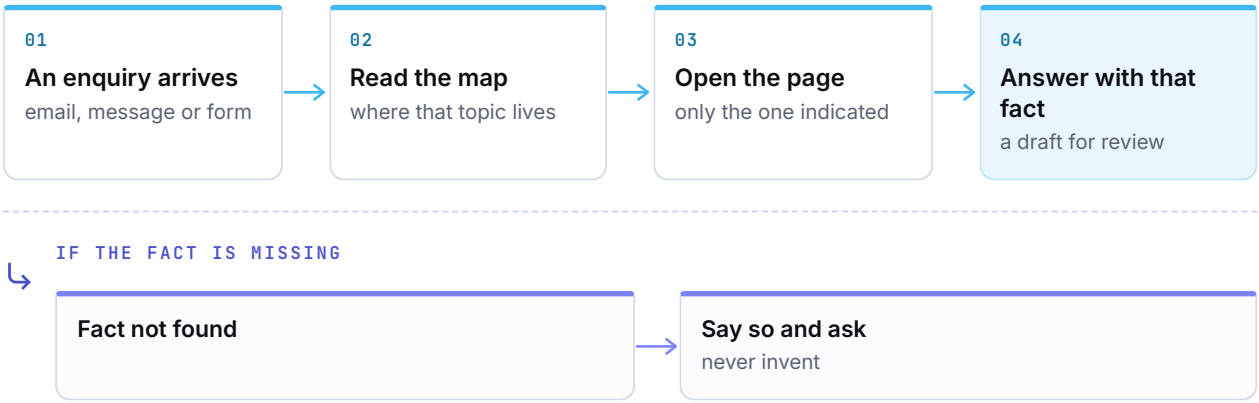
IN ONE LINE

A map that points the way, one page per topic and every fact in a single place.

05 Route, do not dump

The temptation is obvious. You hand the AI everything at once: "here are the two hundred pages, sort it out". It looks more thorough. It works worse. With too much text the model gets lost and mixes old facts with new ones; it also takes longer over every answer (and costs more).
What works is what an experienced person does: check the index and open only the page they need. That is how I work too. The AI reads a map page first and then opens only the file that page points to.

FIGURE 3 How a routing agent answers



This has an advantage that is not obvious at first. When an answer goes wrong, you know which page was read. If the fact was wrong, you fix that page. If the map sent the AI to the wrong place, you fix the map. The mistake has an address. It gets fixed once.

✦ RULE

If the AI cannot find the fact on the page it was sent to, it says so and asks. A good knowledge base includes permission to say "I don't know".

A common question is whether you need a special database, the kind that searches by similarity of meaning (a vector database). For a small business, almost never. Not at the start. Well-named files and a simple search tool go a very long way. The vector database is the last step, if the volume calls for it, not the first.

IN ONE LINE

The AI reads the page it needs, not the whole folder.

06

Keeping it alive

A knowledge base nobody touches decays within a few months. Prices change or a new service arrives, and the notes still say what they said before. Keeping it current costs little once it becomes a habit:

01 **A fifteen-minute weekly review.** The person in charge looks at what changed in the business that week and updates the pages affected.

02 **Every mistake becomes a rule.** When the AI gets something wrong, fixing the answer is not enough. You add a line to the lessons-learned file so it does not happen again.

03 **Facts with dates.** "Price valid from March 2026" can be checked; "current price" cannot. Dated facts tell you on their own when to review them.

04 **Deleting is maintenance too.** What is no longer true comes out; it does not stay "just in case".

A traffic light per page helps in the weekly review. Green The page has a date and an owner. Amber It has an owner but no date. Red Nobody looks after it, and those are the ones to start with.

EXAMPLE

This is how I work. The way I write and the rules for what can go out in my name live in four text files that the AI reads before drafting anything for me. Every time I correct a text, the correction becomes a dated line in one of them. I do not just fix the text; I fix the rule.

> ⚠ CAUTION
>
> Do not keep passwords or customers' personal data in these notes. The knowledge base describes how the business works; it is not a drawer for secrets.

IN ONE LINE

Fifteen minutes a week, and every mistake turned into a rule, keep the knowledge base alive.

07

Example: a travel agency in 12 files

A three-person travel agency wants the AI to draft replies to the enquiries that arrive by email (synthetic example). Before connecting anything, they write their business down in twelve files:

```text
00-map.md                    what I need, where it is, which rule applies
01-about-us.md               team, opening hours and tone with customers
02-destinations.md           destinations we sell and those we don't
03-prices-and-seasons.md     indicative prices with a valid-from date
04-suppliers.md              wholesalers, contacts and confirmation times
05-bookings.md               steps to book and which details to ask for
06-cancellations.md          policy and who approves exceptions
07-travel-documents.md       passports, visas and insurance by destination
08-faq.md                    the twenty questions we get most
09-reply-templates.md        email structure, with no real data
10-lessons-learned.md        every corrected mistake, with its date
11-changes.md                what was updated each week, and by whom
```

When "what documents do I need to travel to Japan in May?" arrives, the AI reads the map, opens `07-travel-documents.md` and prepares a draft. If the destination is not there, it says so. It does not guess. A person reviews the draft and sends it.

Notice what is not there as well. Neither the inbox nor this month's bookings have a file of their own: they are today's situation and are looked up through a connection when needed. Nor do all twelve files have to be

perfect before you start. The map and the pages that answer the most frequent questions are enough for the first drafts; the rest gets filled in during the weekly reviews.

IN ONE LINE

Twelve simple files, and the AI is already working with what your team knows.

08

Checklist

Go through it with your team before you connect any tool:

Your knowledge base, point by point

14 ITEMS

- [ ] What a new hire would need on day one is written down
- [ ] The knowledge lives in plain-text files, in a folder you own
- [ ] The files have a dated version history
- [ ] A map page says where everything is
- [ ] Each topic has its own page
- [ ] Each fact lives in one place and the rest link to it
  replace it, do not pile up versions
- [ ] What changes daily is looked up through a connection
  email and diary, never copied
- [ ] There is a lessons-learned file built from mistakes
- [ ] The AI reads the map and opens only the page it needs
- [ ] If a fact is missing, the AI says so and asks
- [ ] Every page has a named owner
- [ ] A fifteen-minute weekly review is in the calendar
- [ ] Facts that expire carry a date
- [ ] No note holds passwords or customers' personal data

NEXT STEP

Free diagnostic (20 min)

If you want to see which part of your business can be automated with the risk under control, book a free 20-minute diagnostic.

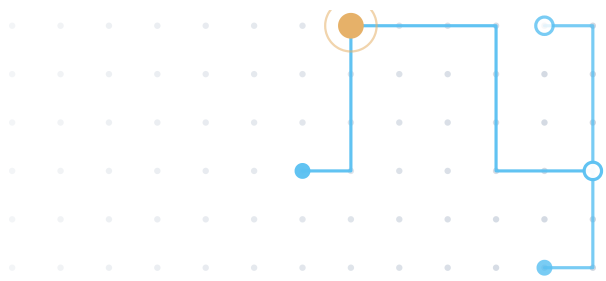
Book a diagnostic ›

flowaraai.com/en/contact

RELATED RESOURCES

AI Knowledge Feeds on GitHub ↗

Your Business Brain in Plain Text Notes ↗



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