CoCounsel Release Notes: 2/29/24

Resources:

Our Help Articles provide robust resources on how to optimize CoCounsel. We strongly encourage users to read these articles, as they provide detailed information with video walkthroughs and more step-by-step guidance. **You can access Help Articles [here](). You can also access video tutorials [here].**

Released: Find, Edit, Add, & Delete in new "Favorites" tab

"Favorites" is a new tab that allows you to find, edit, add, and delete your saved prompts in CoCounsel. Previously used prompts are easier to retrieve.

Section 1: Find Favorites

In CoCounsel, "Favorites" are defined as prompts that you have added and saved.

Step 1: Go to your "Workspace," select "Favorites" tab

On the lower left-hand side panel, also known as your "Workspace," select the "Favorites" tab:
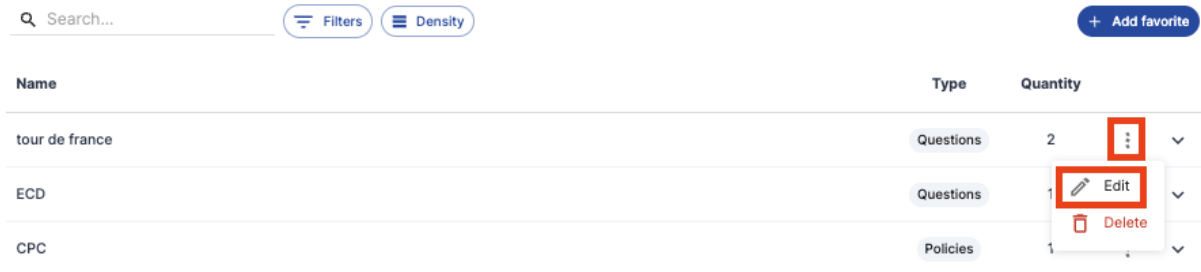
Step 2: Review your "Favorites"

You can review your previously used and saved prompts on a consolidated list. Selecting the downward pointed arrow will reveal what your saved prompt was:
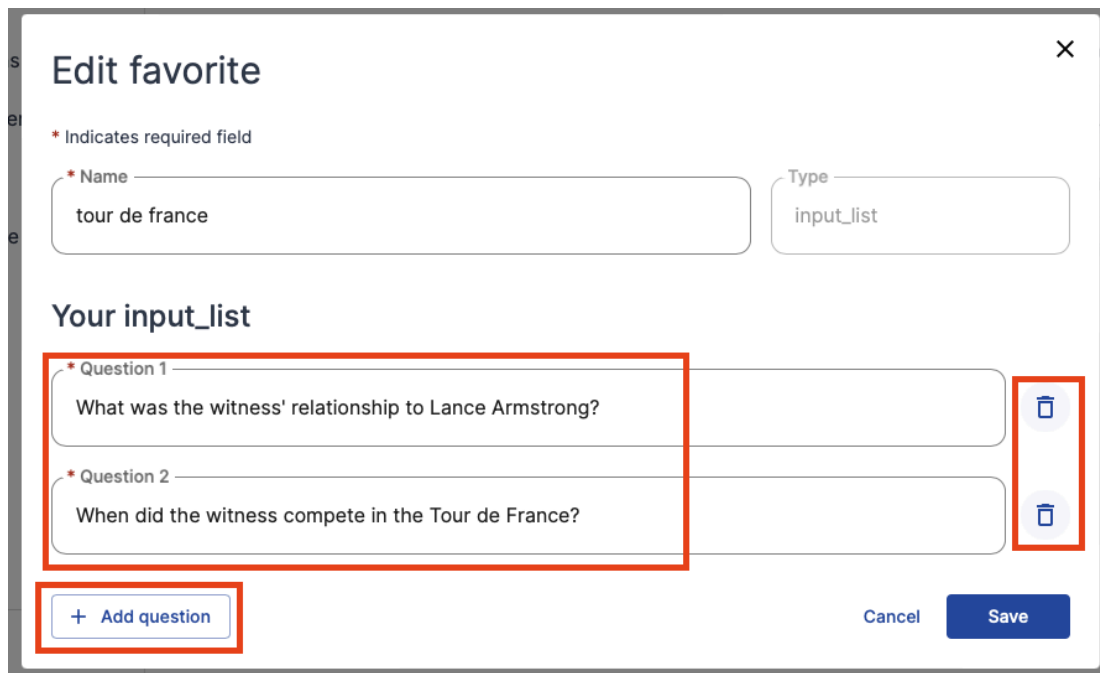
Section 2: Edit Favorites

Editing your "Favorites" allows you to refine your prompts entered into CoCounsel. Go to the "Favorites" tab, select the 3-dot icon, and click "Edit":

After clicking "Edit", a pop-up will appear where you can edit existing prompts, add, or remove prompts to customize your favorite questions:
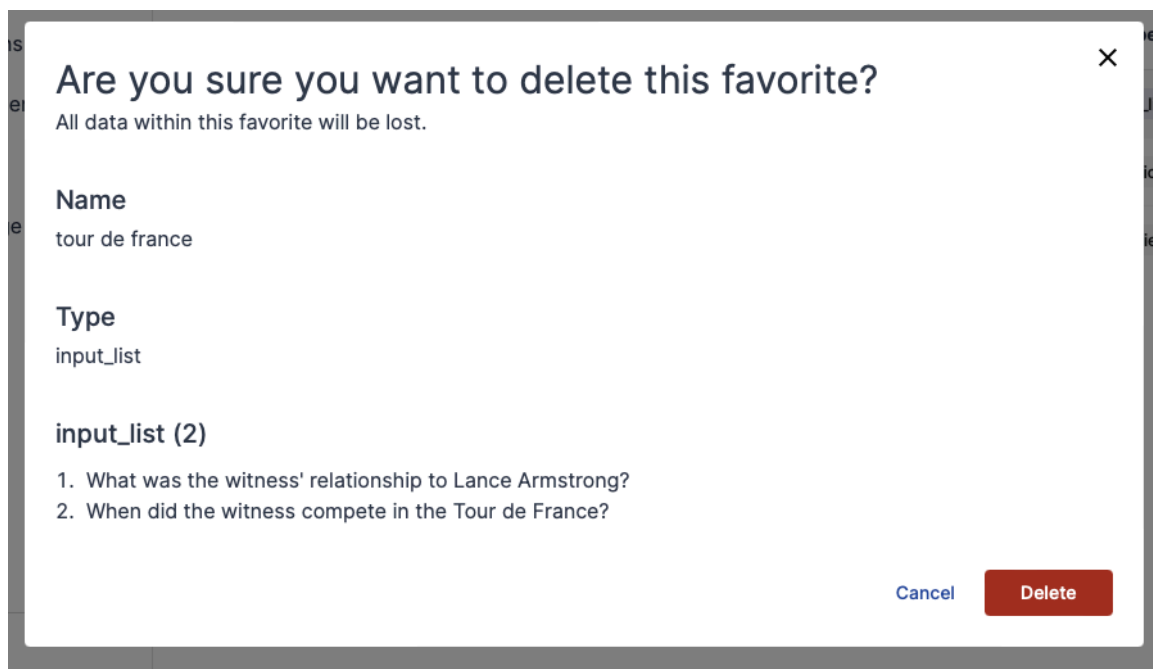

Section 3: Delete Favorites

Deleting your "Favorites" allows you to delete your previously saved prompts. Go to the "Favorites" tab, select the 3-dot icon, and click "Delete":

After clicking "Delete", a pop-up will appear confirming you want to delete the saved prompt permanently:

Section 4: Add Favorites

You can now add prompts to your "Favorites" without triggering a skill in chat in the "Favorites" tab.

On the upper right-hand corner in your "Favorites" tab, select the "+Add Favorite" button:

"Questions" can be run in "Review Documents," and "Extract Contract Data" only, while "Policies" can be run in "Contract Policy Compliance." Differentiating the type of favorite ("Questions"/"Policies") can help you filter through multiple saved prompts in your "Favorites" tab:

Section 5: Using "Favorites" in Chat

The saved prompts in your "Favorites" tab will now be reflected when you invoke a skill in chat.

"Questions" will appear when you are running "Review Documents" and "Extract Contract Data" after invoking these specific skills:

"Policies" will appear when you are running "Contract Policy Compliance" only: