SALESEDGE FIELD GUIDE / ENGLISH EDITION

YOUR AI-ASSISTED KNOWLEDGE SYSTEM

Capture useful information, connect it and turn it into work.

READ / APPLY / REVIEW

Complete English guide + editable source text.

Individual personal and professional use.

FIELD GUIDE / ENGLISH EDITION

YOUR AI-ASSISTED KNOWLEDGE SYSTEM

Set up a capture, connect and create workflow with reviewed AI summaries and practical note templates.

THE PROBLEM WITH SCATTERED KNOWLEDGE

Meeting notes, articles, useful emails and half-developed ideas often live in different places. When a decision arrives, finding the relevant material can take longer than expected. You may repeat research because you cannot remember what you already checked.

A practical knowledge system gives information a reliable home, a source and a reason to be retrieved. AI can help summarise and compare selected material, but it does not automatically know your files or remember every past interaction. Access, context and accuracy must be checked.

This guide develops a capture–connect–create workflow. It includes setup instructions and reusable prompt examples. It does not include an installed assistant, an AI subscription or a ready-connected automation. Start with the notes application and approved AI access you already have.

CAPTURE: MAKE THE FIRST STEP EASY

Use one inbox for information that deserves a later decision. Capture enough context to make the item meaningful: date, source, short description and why it may matter. Do not collect everything merely because storage is cheap.

On the move, a short voice note can preserve your own idea. At a computer, a keyboard shortcut or bookmarked inbox can reduce friction. For web material, keep the link and your own short note about its relevance. For books, record the source and a short, appropriately attributed excerpt where needed rather than copying a whole work.

For meetings, use a recording or transcription tool only where permitted and agreed. A transcript can contain mistakes, confidential information and statements that were never decisions. Verify it before converting it into commitments.

Keep customer and colleague information only where you are authorised to store it. A single inbox means one workflow, not necessarily one unrestricted database. Separate sensitive work when the access rules require it.

PROCESS THE INBOX

Choose one daily review window as a starting cadence. Read each item and decide whether to discard it, store it as a reference, connect it to a project or turn it into an action. An inbox that only accumulates is a collection, not a working system.