
The Flow guide

The always up-to-date version, with search inside the text, is on the website.

IN THIS GUIDE

GETTING AROUND

- [01](#) The home page
- [02](#) The menu
- [03](#) The same files
- [04](#) Space on your computer

FILES, EVERY DAY

- [05](#) Uploading
- [06](#) Downloading and opening
- [07](#) Folders and permissions
- [08](#) The preview
- [09](#) Editing in the browser
- [10](#) Lock for editing
- [11](#) Favorites and Recent
- [12](#) Comments
- [13](#) Chat
- [14](#) Catalogs
- [15](#) Calendar
- [16](#) Automations

SEARCHING

- [17](#) Searching by name
- [18](#) Searching in documents
- [19](#) Searching in sentences

TIME

- [20](#) Versions
- [21](#) The time machine

- [22](#) The trash

WORKING WITH PEOPLE OUTSIDE

- [23](#) Sharing a link
- [24](#) Protecting a link
- [25](#) Getting reviews
- [26](#) Getting signatures
- [27](#) Protected data

FOR DEVELOPERS

- [28](#) Git repositories
- [29](#) API tokens

ADMINISTERING

- [30](#) Users and roles
- [31](#) Team spaces
- [32](#) Quota and space
- [33](#) Customizing
- [34](#) Your own storage
- [35](#) Importing data
- [36](#) Activity log
- [37](#) Ai assistants
- [38](#) Subscription
- [39](#) Free trial
- [40](#) Anti-malware

SECURITY AND DATA

- [41](#) Asking for help

01 The home page

When you sign in, Flow takes you to a page that sums up your work. It is not a list of files: it is five blocks, and each one answers a different question.

- **Spaces:** where you can work. Each space shows how many people belong to it; your personal one says **Reserved for you**, because nobody else is there.
- **Recent:** the files touched most recently, by you or by your colleagues.
- **Favorites:** the ones you have marked with the star.
- **Files locked by you:** the ones you have taken to work on without others changing them. Keeping them in view helps: you release them when you are done, and this block reminds you.
- **Shared:** the links you have created that are still active.

Each block shows the first five items. If there are more, the **See all** button opens the full page for that block.

A block that is still empty tells you what will appear in it, so the page is clear from your very first day.

If it is your first day and you still need to sign in or install the apps, start from the [Getting started](#) guide.

02 The menu: where everything is

The menu on the left is always the same, on every page. From top to bottom:

The Flow logo takes you back to the home page: it is your way home from wherever you are.

Spaces lists the team spaces. The arrow next to a space opens its folders right in the menu, without opening the space. With **New space** you create one, if your role allows it.

Repositories appears if your company has Git repositories, and lists yours.

My Flow is your own space.

General gathers the ways to find things again instead of looking for them where they are: **Recent**, **Favorites**, **Locked by me**, **Tags**, **Shared**, **Signatures** (if your company has electronic signatures) and **Trash**.

At the bottom, always within reach: **Desktop apps** with the installers, **Support** to write to us and **Admin console** if you administer your company. Further down you find the space used out of your plan's total, your profile, the light/dark theme switch and **Sign out**.

You can shrink the menu to a column of icons only with the button at the top: useful on narrow screens, or when you want more room for your files. On phones and tablets it is not fixed: it slides open and closed.

03 The same files from three places

You reach the same files from the **browser**, from the **Finder** on the Mac and from **File Explorer** on Windows. They are not three copies: it is the same archive seen through three doors. What you change in one place appears in the others.

The Mac and Windows apps are not a separate virtual disk: they are part of the system's file system, and Flow's files sit in a folder like any other. You work on them with the program you usually use, and you save where you always save.

You see the structure straight away; the content comes down when you need it.

As soon as the app is connected, all the folders and names are there, but they take up no space on the disk: a file's content is downloaded the first time you open it. That is why a space of hundreds of gigabytes does not fill up your laptop.

Changes spread on their own, without you having to refresh anything: if a colleague moves or edits a file, you see it updated within a few seconds.

04 The space on your computer

Only what you open ends up on the disk, and from then on you decide: which folders to keep always ready, and what to let Flow free up by itself. The commands for a single file or a single folder ("Make available offline" and "Make available online only" in the Finder, and the Windows items "Always keep on this device" and "Free up space") are in the [Getting started](#) guide, together with the installation.

Flow can make room by itself. In the app's Settings there is the **Free up space** feature, Flow's own, not to be confused with the Windows menu item of the same name. Turn it on and choose after how long without use a downloaded file can go

back to online only: **1 day**, **1 week** or **1 month**. Once a day, when the computer is idle, Flow goes through the files you have not opened for longer than that and returns them to the server. You still see them in the Finder or in File Explorer, and they download again as soon as you open them.

Under the drop-down it says how the last run went ("Last run: today at 04:00, freed 3.2 GB"), so you know how much space it has given back to you.

It is off by default: until you turn it on, everything you have downloaded stays on the computer. And in any case, files open at that moment and files with changes not yet uploaded stay where they are.

The folders to always keep. With "Free up space" on, **Choose the folders to always keep** appears in the Settings: it opens the window of synced folders, where each checkbox has a third state with the **padlock**. Each click moves from *sync* to **never free up**, and then to *don't sync*. Folders with the padlock (the project you are working on, the documents you need on a plane) stay on the computer even if months go by without you opening them.

The system's own gestures also apply: "Keep Downloaded" in the Finder and "Always keep on this device" in File Explorer.

05 Uploading files

In the browser you have two ways. **Drag** the files into the window: the drop area tells you which folder they will go to. Or use the **Upload** button, which opens the file picker.

In the browser you upload **files**: you create the folder in Flow with **New folder** and upload what you need into it.

For a whole tree of folders there is an easier way: from the Mac and from Windows you copy everything into the Flow folder as you would into any other folder, and it goes up by itself, folders included, with their structure. It is the right way when you need to bring up a lot of material at once.

From phones and tablets, the **Upload** button also offers **Take photo**, **Scan document** and the **Photo library**.

During the upload you see the progress file by file, and each file moves along on its own.

06 Downloading and opening

A click on a file opens its **Preview**: in most cases you do not need to download anything to look at it.

To have it on your computer there is **Download**. If you select several items, or a whole folder, Flow prepares a **zip** and sends it to you: the preparation takes a few moments, and it lets you know when the download starts.

From the Mac and from Windows you open the file with a double click, like any other: if the content is not on the disk yet, it comes down at that moment. The changes you save go back up on their own.

07 Folders, moving, permissions

New folder creates a folder where you are. Renaming, moving and deleting are done from the ... menu of each item, and they also work on several items selected together.

Within a single space, **a folder can have its own permissions**. It is the answer to a real case: the "Accounting" space belongs to the whole department, but the payroll folder does not.

Opening **Access** on a folder, you choose between two states:

- **visible to everyone in the space** (the normal setting): whoever is in the space sees it;
- **Restricted**: only the people you list there can see it, and the administrators. Administrators always see it, so the company keeps access to its own documents.

For each person you add, choose **Can edit** or **Read only**. A folder's permissions are changed by administrators and by whoever has "can edit" on that folder.

If a small icon appears next to the name of a folder or a file, that folder is open to an **Ai assistant**: hovering over it tells you which connection, and the information panel spells it out in full.

08 Document preview

The preview lets you look at a document **without downloading it**: it opens in the browser, full screen, and from there you can scroll through the other files in the same folder.

It works with everyday documents (PDFs, Office files, images, text) and it also applies to anyone who opens a share link without having an account: a guest looks at documents the way you do.

When you look at a folder **as it was in the past**, to see a document again you bring it back or open its versions.

09 Editing in the browser

Word, Excel and PowerPoint documents and PDFs are edited **right inside Flow**, without downloading them and without having the program installed: from a file's menu, **Edit**.

Changes save themselves. There is no "save" button to remember: the editor writes as you go, and each round of work becomes a version of the file like any other save.

The formats the editor opens for editing:

- **documents:** docx, docm, dotx, odt, ott, rtf, txt;
- **spreadsheets:** xlsx, xlsx, xltx, ods, ots, csv, tsv;
- **presentations:** pptx, pptm, ppsx, potx, odp, otp;
- **PDF.**

Formats from the previous generation of Office, **doc, xls, ppt** (and dot, xlt, pot, pps), open with **Open**, and Flow offers **Convert and edit**: it creates the modern copy next to the original (doc to docx, xls to xlsx, ppt to pptx) and opens that one. The original stays as it is.

If a colleague is editing the same document in the browser, you see it written: Flow tells you who it is. And if the file is locked by someone else, the editor opens in **Read only** and explains why, so you do not work on something you then could not save.

A PDF in a signing round also opens in read only: a document someone is signing cannot change under their hands.

10 Locking a file for editing

When you need to work on a file for a while and you do not want anyone else to change it in the meantime, lock it: from the file's menu, **Lock for editing**.

From then on, others can see it, open it and download it, but not edit it: anyone who tries is told that the file is **Locked by you**. You can leave a **note for your colleagues**, and it is worth it: "I'm redoing chapter 3" saves a phone call.

It has an expiry date. The date is shown on the file, and from that moment the file can be edited by everyone again: this way it stays available to the team even when the lock is not released by hand.

When you are done, **Release**. All the files you hold locked are in one place (**Locked by me** in the menu) and every morning you can receive a summary of them by email, with the expiry dates.

You can also lock a **Folder**: the files inside it show as locked by you. An administrator, if needed, can **force the release** of someone else's lock: the file loses its protection and the action is recorded in the activity log.

11 Favorites, Recent and Tags

Three ways to find a file again without remembering where it is.

Favorites: the star on a file or a folder adds it to the **Favorites** list in the menu. It is for the things you go back to every day.

Recent gathers the files touched most recently, newest first, not only by you: also by your colleagues in the spaces you share. It is the right place to pick up yesterday's work.

Tags are words that group files by topic ("invoices", "contracts"), regardless of the folder they are in. Two things to know: the tag vocabulary is created by an **Administrator**, and tags are part of **Ai search**, so they are there if your company's plan includes it.

When a tag has a description, Flow applies it by itself to the documents that match it. What the Ai applies is **marked as such**, and your correction always wins: if you remove a tag, it does not come back.

12 Comments on files

Every file has its own conversation, next to the file and not in a stray email. The comments panel opens from the ... → **Comments** menu or from the speech-bubble button in the file's details.

You write, reply within a thread, use emoji and **mention a colleague with @**: as you type, Flow suggests the members of the space, and whoever is mentioned receives an email. You can delete your own comments, not other people's.

Email notifications go to whoever takes part in the conversation and to whoever is mentioned, and you turn them off from your profile, in **Notifications**.

Comments are on **files**, not on folders, and they are there for everyone: they are not tied to the plan.

13 Team chat

Flow has a chat for the company, with the same people and the same spaces as the files. In the web app it opens from the **Chat** item in the menu, on the phone from the bar at the bottom; on Mac and Windows from the Flow panel, in a window that stays open while you work.

The conversations are already set up: each **team space** has its own channel, with its members; **All** gathers the whole company; and you can open a one-to-one conversation with any colleague. A channel is visible to whoever can see the space's files.

You write, reply to a message, add a reaction and **mention a colleague with @**: they receive a notification. With the + button next to the field you attach files from your computer or from Flow and insert icons. With the arrow next to **Send** you choose how to send it: normally, or as a message that **self-destructs** a few seconds after it has been read.

Attachments remain Flow files. Every participant finds the file in their own space, in **My Flow > Chat**, under the name of the conversation: synced to the computer,

with versions and trash like any other file.

At the top of the chat, **Search messages** finds words, phrases and authors; messages also appear in Flow's general search. On the computer, a system notification arrives for direct messages and for mentions.

Messages are stored encrypted on our servers.

14 Product catalogs

If your products are already in Excel or CSV sheets, with the photos and datasheets alongside, Flow turns them into a **laid-out PDF catalog** and a **web catalog** to open with a link. The files stay where they are: the catalog uses them from there, without copying or moving them.

This chapter is a summary: every step is described in detail in the [product catalog guide](#).

Creating a catalog

From the **Catalogs** section of the menu, **New catalog** asks for the name and how to start:

- **Empty:** you decide the fields, families and sections, and add the products by hand;
- **Example: furniture:** a trial catalog with hundreds of products and their images, to see straight away how it works. It carries the **Example** badge: the data and images are made up;
- **From a folder:** choose the folder with the sheets and Flow proposes the catalog to you in five steps.

From the Files section you reach the same point with **Create a catalog from this folder**, in a folder's menu.

From the folder to the catalog, in five steps

At each step Flow **suggests** and you confirm or correct: the recommended choices are already switched on, and with **Back** and **Next** you move between the steps.

Tables: the sheets found in the folder, in blocks. Each product table has a switch to include it in the catalog and its **Key:** the column with the product code. If there

is more than one product table, for each one you also choose the name of the **Family**. Below, under **They add data**, are the sheets that add data to the same codes, for example a price list: for each one you choose the **Key**, the column that carries the product code, and the **Fields to import**. Next to the key you see a code found in both files and how many codes find a product. With **Use as the products table** you swap the roles of the two sheets. At the bottom, the other versions of the same file, with the differences spelled out: you choose which one to use.

Headers: for each table, the row with the column names. If the highlighted one is not right, you select another; with **No header row** the columns are called A, B, C... and you rename them in the next step. Files without titles, such as database exports, are recognized by Flow on its own, and it starts from **No header row**.

Columns: for each column, choose what it **Becomes:** the **Product code**, the **Product name**, a **Section**, a **Field** or **A file name**. Alongside, you scroll through the examples, product by product, and with a switch you decide what to import. Dragging the rows changes the order of the fields, which is the same in the catalog and in the PDF. A click on a row opens the details:

- the **Field name** and the **Type**: short or long text, number, price, yes / no, date, choice;
- for numbers the **Unit** and the **Decimals**, for prices the decimals;
- for texts the **Language**, and **Merge with** to make two columns into a single field;
- **Required**, if the product sheet is not complete without that field;
- **Also a section**, to group the products by this column too, at the level you choose.

When some rows in the code column are section titles, choose **Codes and section titles** and describe when a row is a title, with simple conditions such as "is empty" or "starts with": Flow tells you straight away how many titles and how many products result. A column containing JSON data opens up by itself into several fields. In **Fields without a column** you add the fields that no sheet carries and that you will fill in within Flow.

All the columns are in a single view: next to each one, **From** tells you which file it comes from, and for the sheets that add data you find the fields chosen in the **Tables** step. When the chosen type cannot read the values of the column, for example «kg. 8» as a number, a warning tells you how many there are and

suggests **Use Short text**; if you keep the type, those values go in as they are written. The same warning appears when a choice has more different values than it can hold.

Files: how photos, datasheets and drawings are linked to the products: for each table, choose the column to compare with the file names, and see how many files each one picks up. Flow recognizes a name equal to the code, a name that starts with the code, a folder named after the code and the code inside the name. PDF sheets become **Datasheet**, DWG, DXF and STEP files **Drawing**, photos **Main image** or **Gallery**. If a file is left out, with **Rules by example** you write a product's code and the name of one of its files: Flow works out the rule and, with **Apply**, shows you how many more files it links.

Create: the catalog name, the **Language of the texts**, the **Currency** and the **Catalog languages**. The summary shows products, sections, fields and linked files, with what is worth knowing, such as duplicate rows or rows without a code. Then **Create with N products**.

Settings and updates

In the catalog's **Settings** tab you find the same five steps again, with the choices you made: you always create and edit from the same place. Here you also choose **Where the PDFs go**.

When the sheets change, the last step becomes **Update the catalog**, and before confirming you see what will happen: new products, products with new values, products no longer in the files to be archived, products that have come back.

Values corrected by hand stay as they are, and products that are no longer in the files are archived: they are not deleted.

A catalog that started empty or as an example has its fields and families here, the **Starting folder** from which files are linked and, whenever you want, **Choose a folder** to bring sheets into it.

Products

The **Products** tab lists the products with thumbnail, code, name, section, **Completeness** and status. You search by code or name, filter by section, family and status, and with **New product** you add one by hand. By selecting several products you change their status, section or family all at once.

Each product is **Draft**, **Ready** or **Archived**: you decide, and when exporting you can keep only the ready products. The product sheet has the fields grouped, the catalog languages, a preview of how it will look in the PDF and, on the right, its completeness with what is missing. With **Link files** you add photos, drawings and datasheets, choosing their role: the files stay in their folders, and the link holds even if you move or rename them. The **Change history** tells you who changed what, and when.

Sections

The **Sections** tab shows the tree of sections and subsections, with the name in each language and how many products each one has. You create them, rename them and put them in order with **Move up** and **Move down**: it is the order of the catalog's chapters. A product goes into a section from its sheet, or together with others from the Products tab.

The look

In the **Look** tab the settings are in three groups, split into cards that open and close:

- **General settings**, which apply to both the PDF and the web catalog: **Title and Logo** (title, subtitle and company logo), **Texts** (the font), **Layout** (from one product per page to a single list) and **Images**;
- **Print settings**, for the PDF: **Cover**, **Text color**, **Page**, **Page header** and **Page footer**;
- **Web settings**, for the web catalog: **Colors and sizes** and **Web page**.

At the top, **Search a setting** leaves in view only the cards that contain the word you searched for, already open and with the word highlighted.

Alongside is the **Preview**, which follows every choice as you make it, even before you save. With **PDF** you see the first pages, all together or one at a time, large, to leaf through; with **Web** you see the web catalog page with the first products, as on a computer or as on a phone. When you like the result, **Save**.

The cover. In **Cover** you choose the **Layout** from eleven: Solid background, Light with band, Centered, Side band, Half and half, Frame, Giant title, Diagonal, Stripe, Editorial and Cover photo. Each one works with or without the logo. With **Cover photo** you also choose the **Cover image** from those already uploaded to Flow. Here you decide the **Cover color** and, for title and subtitle, color and **Size**. The

colors include white and black, and with the picker you can choose any other.

Text color applies to all the texts in the PDF: labels and margins take it in a lighter shade.

Images. In **Images** you decide whether to use the product photos and, when a photo is missing, whether to use the first page of the PDF datasheet in its place. For products still without an image, choose what to show: a grey box, the words "Image not available", the catalog logo, nothing, or an image of your own.

Automatic proportions gives the boxes the right shape for the layout; if you turn it off, you choose it yourself. With **Fit** the photo **fills the frame** or is shown **whole**, on a white background. You can add a border and rounded corners. These choices apply both in the PDF and in the web catalog.

The page. In **Page** you choose landscape pages, whether to **start each section on a new page**, the color and size of the section titles and where to put the indexes. Header and footer have three slots, on the left, in the center and on the right, where you can put the logo, the catalog name, the section, the page number, the date or free text.

Exporting the PDF

From **Export**, with the **PDF** format, choose the language, whether to print prices, whether to keep **Only ready products** and whether to export everything or **Only some sections**. The PDF is saved in the **Cataloghi esportati** folder, or in the one chosen in **Where the PDFs go**: if it is already there, choose whether to **replace the file**, which stays among the versions, or **create a new one** alongside it. While it works you can close the window with **Close and let it work**.

The PDF has bookmarks for the index, sections and products. The latest exported files appear at the top of the catalog page, with their pages and date.

The web catalog

From **Export**, with the **Web** format, choose the language and whether to show prices; **Publish on the web** saves an edition of the catalog in the **Exported catalogs** folder. From there you create the link with **Share with options...**, as for any file, with a password and an expiry date if needed. The link is created only once: later editions arrive on the same link, and whoever opens it always sees the latest.

Whoever opens the link finds the products divided into sections, search by code, name or feature, and lightweight images, even from a phone.

In the Files section the edition is recognizable by the globe and the **Web catalog** label: opening it, you see the catalog as whoever has the link sees it, with **Open the catalog** and **Link to share**.

In **Colors and sizes** you choose the text color, the **Accent color** (buttons, cart, section titles) and the color and size in pixels of title and subtitle. **Inherit from PDF** copies them from the print settings. If you later change them in the PDF, press it again to carry them over to the web as well.

Cart and requests

With **Cart and requests**, in **Web page**, visitors to the web catalog add products to a request and send it as a quote, an order or a request for information. The request reaches you by email and stays in the catalog's **Requests** tab, with the contact details and the products requested. After turning it on, publish the web catalog again. To bring any product changes to the web, publish a new edition.

Who can do what

Catalogs are created by the administrator, or by whoever has been given permission in **Admin console → Users**. With **Members**, the catalog's **Manager** chooses who **Can edit** and who has **Read only**: readers see products and sections, editors also the look, export and requests.

The folder that feeds a catalog is protected: before you delete it, Flow warns you which catalog uses those files.

15 The calendar

Flow has a calendar for each person and one for each **team space**, with the same members who see its files. In the web app it opens from the **Calendar** item in the menu, on the phone from the bar at the bottom; on Mac and Windows it is a section of the apps' window, next to **Chat** and **Files**. On the left you find the calendars in two groups, **Mine** and **Groups**, and with the switch next to each one you choose which to see.

At the top you choose the view: **Day**, **Week**, **Month** or **Year**, and with **Today** and the arrows you move through time. To find an event without scrolling through the months, you search for it by name.

To create an event press **New**, or click on a day or on a free hour. In the event window you enter **Title**, **Calendar**, **Starts** and **Ends**, **Location** and **Notes**; with **All day** the event takes up the whole day, and with **Color** you give it a shade of its own, otherwise it takes the space's. To move an event you drag it; to change its length you stretch its bottom edge. In a space, events are created and edited by whoever can edit its files; whoever has read-only access can view them.

With **Repeat** the event comes back every day, on weekdays, every week, every two weeks, every month or every year, until the date you choose in **End repeat**. When you edit or move a repeating event, Flow asks which ones to apply the change to: **This event only**, **This and following events** or **All events**. With **Other time zone** you pin the event to the time zone of another city: everyone sees it at their own local time.

In **Guests** you type the names of colleagues or the email address of people outside the company. Colleagues find the event in their calendar and answer **Yes**, **Maybe** or **No**; until they answer, the event shows with a dashed outline. People outside the company receive an email with the invitation and answer with the **Accept**, **Maybe** or **Decline** links in the email, without creating an account. If the event changes, the updated invitation goes out by itself.

With **Alert** you choose when to get the reminder: it arrives as a notification on the phone and by email, to you and to the invited colleagues; tapping the notification opens the event. In the **Dashboard**, the **Upcoming events** box shows those of the following days.

KAI creates and moves events for you: ask it, for example, "put the trade fair in from the 15th to the 17th". It prepares the event with guests and alerts, and saves it when you press the confirm button. In chat, **/evento** followed by a description has KAI prepare it, and **/oggi** opens the calendar on the current day.

To have the calendar on other devices, open **Connect devices** and choose how:

- **With Microsoft 365 (Outlook)**: press **Connect Microsoft 365**, sign in with your Microsoft account and choose which Flow calendars to keep in sync with your Outlook ones.
- **With a profile (iPhone, Mac, Android)**: name the device and press **Create password**. On iPhone and Mac press **Download the profile for iPhone and Mac** and install it; on Android, with DAVx5, and on Thunderbird enter **Server**, **User name** and **Password**. Events can be edited from there too, and in **Connected devices** you revoke the password of a device you no longer use.

- **Read-only (Google Calendar and others):** choose the calendar and press **Create address**; add the address to the program as an internet calendar. Events can be seen but not edited.

16 Folder automations (Work/flow)

A folder can take steps on its own when something happens: a file arrives, a file changes, a signature is completed, a review comes in. Or, every week, it sends a summary. Automations come with **KAI**, Flow's assistant.

You open them from **Automations**: at the top when you are inside the folder (on the phone in the ... menu), from the folder's menu in the list, or from the **Automations** item in the menu, which lists them all. Folders with an active automation show its icon next to the name.

With **New automation** you write what should happen, for example "if it's a contract, send it to Giulia for approval and then move it to Contracts", and press **Prepare with KAI**: KAI proposes the name, when it starts and the steps. You check and correct them; if the sentence asks for something the steps can't do, KAI says so in a note. With **Build it yourself** you put the steps together on your own.

The steps:

- **KAI reads the file:** it reads the document, or looks at the photo, and answers the questions you write (yes or no, a number, a text, a date).
- **Rule:** decides based on KAI's answers or on the result of an approval or a review. If it doesn't hold, it runs the **Otherwise** actions and stops.
- **Approval:** one or more people approve or reject from the chat with KAI. With several people you choose whether one is enough or everyone must approve; you can ask for a reminder. Whoever rejects can say why.
- **Move:** to a folder you choose, or let KAI choose among a few folders.
- **Notify:** the people you choose, and whoever uploaded the file, in the chat with KAI, with a phone notification or by email.
- **Post in the channel:** KAI posts in the space's chat channel.
- **Calendar event:** a one-day event on the date KAI found (for example a deadline), plus or minus the days you choose.
- **Ask for a signature:** the signature goes at the bottom of the last page; the job waits until everyone has signed.

- **Ask an outside review:** before the link goes to someone outside the company, whoever switched the automation on gets a confirmation request in the chat. KAI writes the link's password in the chat, to send separately.

Save leaves it off, **Save and turn on** switches it on. An automation works with the permissions of whoever switched it on: where that person can't go, it stops and says so. By default it only handles files that arrive after it's switched on; with **Also the files already in the folder** it takes those too. With **Include subfolders too** it looks further down.

In **What happened** you see every file: where it stands, what KAI understood, who decided, and the step-by-step log. A stopped job restarts with **Try again**. If KAI isn't available at that moment, its steps wait and pick up on their own. Each company has a maximum number of KAI readings per day for automations: beyond it, jobs resume the next day.

A **space** has automations too, for what isn't a file: at the root of the space (outside any folder) the **Automations** button opens the space's ones. They start **when a message arrives in the space's channel** or **when an event in the space's calendar is coming up** (on the day or a few days before). KAI reads the message or the event; then you can notify people, post in the channel and add events. The space's managers and the administrators create and change them.

In your **My Flow** space the automations are yours only: they start **when someone writes to you privately** (anyone, or the people you choose, and if you like **only when you're offline**) or when an event in your calendar is coming up. The notice carries the full text of the message, by email too.

You can also ask **KAI in the chat**, in plain words: "when Cristiano writes to me and I'm offline, email me the text". KAI prepares the steps and describes them under its answer: **Turn on** switches it on as is, **Edit** opens the window to change it. If a similar one already exists, KAI says so and offers **Update that one**. You can also ask KAI which automations there are, and to switch one on or off, change it or delete it: nothing happens until you confirm. In a space's channel there is also the **/kai workflow** command. In the **Automations** list, the **Created by** column shows whose each one is.

More steps: **Send the file** (to people in the company right away; to people outside a password-protected link that only goes out once you confirm in the chat), **Rename the file**, **Add tags**, **Add a comment to the file** (e.g. KAI's description), **Note it in an Excel sheet** (each time a row with the data you choose, e.g. date,

supplier, amount) and **Call a web address**. In names and texts you can use `{nome}`, `{data}` and KAI's answers (`{kai.amount}`). An approval can **expire**: if nobody answers within the chosen days it counts as rejected, approved, or someone is notified. The summary can come every day, week or month. In a space an automation can also start **when another program calls its address** (webhook).

Before switching it on, **Try on a file** (or with a message) runs it without touching anything and tells you what it would do. There are **ready examples** to start from. If whoever switched it on leaves the company, the automation switches off and the administrators are told.

KAI suggestions: from the **Automations** page you can switch them on for yourself. KAI watches the operations you repeat and offers in the chat to do them for you ("when you upload to Quotes you then send it to Mario: shall I do it?"), or a reminder if you update the same file every week. It only looks at your own actions and only you see the suggestions. **Check now** makes KAI look right away (it takes the same operation at least 3 times).

Neither the administrators nor the company can see what KAI records or its suggestions, and they are not used to assess anyone's work. Each operation is deleted after 90 days; switching them off deletes everything. For its internal IT policy the company can use this paragraph:

The company uses the Flow platform for document management. Flow records the file operations needed for the service to work. The optional «KAI suggestions» feature, which each user can switch on and off for themselves, records some file operations only to suggest automations to that user; the data is visible only to that user, is deleted after 90 days or when the feature is switched off, and cannot be accessed by the company, which does not use it to monitor or assess anyone.

17 Searching by name

The box at the top searches **in all the files** you have access to. Type part of the name and the results appear as you type.

If there are too many results, narrow the **scope**: **Everywhere**, **This space** or **This folder**. The chosen scope stays visible as a label next to the search, so you

always know where you are searching, and you remove it with one click.

From the Mac and from Windows search is also in the desktop app, in a window of its own: you open it from the Flow icon and find the file without going through the browser.

18 Searching inside documents

Search also looks **inside** documents: PDFs, Office files and text, in Italian and in English. You find a contract from a sentence it contains, not only from the file name.

Scanned documents too. A photographed invoice or a page run through the scanner contains no text: it is an image. Flow reads it with character recognition and indexes its words, so it becomes searchable like any other document.

Results found in the content and not in the name are flagged as such: the row says **in the content**, and you know why that file appeared.

Recognition works in the **background**: shortly after the upload, the document can also be searched by its content.

19 Searching in sentences, by meaning

With Ai search turned on, you write your request **the way you would say it out loud** ("last year's October quotes") and press ENTER: Flow turns it into the matching filters, which stay visible next to the box: you read them, and if one is not useful you remove it.

Search by meaning also finds documents that **do not contain the words you typed** but talk about the same thing. Those results are flagged as **related**, to set them apart from an exact match.

This feature **also requires content recognition**: searching by meaning needs the text of the documents. In the plans the two go together. **Tags** also depend on Ai search.

20 A file's versions

Every save creates a **version**: overwriting a file does not delete what was there before.

From a file's menu, **Versions** opens the history: who saved, when, how big it was. From there **Restore** takes the file back to an earlier version, and the current version **stays in the history**, so restoring is not a one-way door: you can go back from going back.

This also applies to files edited from the Mac or from Windows: a save made from your usual program creates a version just like one made in the browser.

21 The time machine

Versions concern a single file. The time machine concerns **a folder or a whole space**: it shows you how it was at a moment in the past, and lets you take it back there.

Choose the moment and Flow shows you the content as it was then. If you decide to take it back, **before doing anything it tells you what will happen**: how many files will return to the version of that time, how many items created later will go to the trash, how many will come back from the trash, and which ones are left untouched.

Nothing is destroyed. Items created after the chosen moment are not deleted: they go to the trash, from where they can be recovered. And the last operation can be **undone**.

Taking **a whole space** back is reserved for administrators: it is an operation that affects everyone's work. A single folder can be taken back by whoever can edit it.

In the past you browse the list as it was; to see a document again, you take it back or open its versions.

22 The trash

Deleting a file **moves it to the trash**: it does not disappear straight away, and from there it can be put back in its place.

How long it stays there is decided by your company's administrator: they can set a number of days after which the trash empties itself, or keep items until someone deletes them. The rule in force is written at the top of the **Trash** page, and each item shows how much time it has left.

From the trash you can restore a single item or **everything**. If something with the same name is already where an item used to be, Flow tells you and leaves it in the trash, so nothing gets overwritten.

Empty trash frees up space: items in the trash count towards the quota while they are there, and the administrator gets an alert when the trash nears the limit.

23 Sharing a link

In the menu of a file or a folder, **Copy link** creates a link that anyone who receives it can open, **without an account and without installing anything**, and copies it right away. To choose how it works first, use **Share with options....**

Choose what whoever opens it can do:

- **Read only:** browse and download;
- **Read & upload:** see the content and add files;
- **Drop-off only:** can only hand in files, **without seeing** what is in the folder. It is a letterbox: you use it when you collect documents from several people who must not see each other's.

You copy the link, or you turn on **Send by email:** you type the addresses and Flow sends the message with the link.

All active links are in **Shared**, in the menu, with the creation date and the expiry date. From there you **Revoke** them: whoever has the link can no longer open it.

24 Protecting a link

A link without protection is open: anyone who has it can use it, forever. Flow tells you so plainly, so that it is a choice and not an oversight.

Two protections, independent of each other:

- **a password**, which the guest must type to get in. You can read it again later, from the same window;

- **an expiry date**, after which the link no longer works.

On the file, a label shows that an active link exists, and says so if it is password-protected.

When you change a link that is **already in circulation**, Flow sums up what you are changing and asks you to confirm: adding a password to a link that has already been handed out locks out whoever had it, and that is a consequence that must be clear before, not after.

And at any moment there is **Revoke link**: immediate closure, without waiting for the expiry date.

25 Getting documents reviewed

On a link to a folder you can ask for a **review**: the guest, file by file, approves, does not approve, or leaves a note without deciding. They do not need an account.

The link needs a **Password**: without one, the review switch stays off and the sharing window tells you so. You give the password to the reviewer yourself, separately: it is not in the email.

One link per reviewer: this way each review round has a name, and the answers stay separate. When the answers on a file do not match, Flow points it out.

On your side you see the status of the round (**requested, in progress, completed**) and for each file the outcome with the notes of whoever answered. You can filter to see only the approved files, only the ones not approved or only the files with a note, and **export the results to Excel** to attach them to minutes.

26 Getting a document signed

Request signature... in a document's menu starts a signing process. Whoever has to sign receives a link and does not need an account.

The signer's path has four steps, in this order:

1. **Read**: the documents are scrolled **all the way to the end**: the signature covers what has actually been read, not what has been opened.
2. **Consent**: the statement of having read and of agreeing.

3. **Verify:** Flow sends a one-time code to the signer's email address, to make sure the mailbox is theirs.
4. **Sign:** the name is typed or drawn, and confirmed.

Whoever signs can also **decline**: in that case the process stops for everyone, and nobody else signs. A request **Expires** on a set date, and the sender can cancel it.

When everyone has signed, the process is complete and the **signed document** can be downloaded. Your signing processes are in **Signatures**, in the menu.

While a PDF is in a signing round, it opens in read only: the document someone is signing does not change.

27 Sending and requesting protected data

Passwords should not travel by email or in chat: there they stay forever, in mailboxes you do not control. **Protected data** lets them pass through Flow, with a link that can be read only once and then disappears from the server.

Sending

From **Protected data** → **Send protected data** you paste what you need to send (a password, a code, a username and its key) or you generate it on the spot with **Generate password**, which also tells you how strong it is.

Then you choose:

- **what it is about:** it is required, and the recipient reads it, in the email and on the link's page. Without it, a string arrives with no context;
- **how long the link lasts:** from one hour to thirty days;
- **how many reads it allows:** one, two, three or five;
- an optional **Passphrase**, which the recipient must type;
- **who to send it to**, a single person, or no one, and you copy the link yourself.

Before it goes, a confirmation shows the address in full: it is the last moment to notice a wrong recipient.

What happens next

Whoever opens the link sees the content **once**, copies it and that is it. You receive the email "read on ... at ..." and in the log the row changes to **Read**. As long as

nobody has opened it, you can **revoke** it: the link stops working immediately.

After it has been read, the data **is no longer on the server**. Nobody can recover it, not even us: the recipient must save it straight away in their own password manager.

Requesting

It also works the other way round. With **Request protected data** you write what you need and who you are asking: the customer receives a link, pastes into it what you asked for (even several lines, such as a username and its password) and the link is used up. They do not need an account.

In the log the row changes to **Received: to read**, and **Read** shows them to you only once, with a confirmation first.

The rules to follow

- **One recipient per sending.** A single-read link sent to two people is used up by the first: nothing reaches the second. For two people, two sendings.
- **The passphrase does not go in the email.** Give it in person or by message: if it travels with the link, it protects against nothing.
- **The email carries only the link and the subject**, never the content.
- **Once read, it is gone.** If it is needed again, send it again.

In the list you can search by subject or recipient and filter by status: waiting, requests, received, read, expired, revoked.

28 Git repositories

Flow also hosts **Git repositories**, next to the files. You create them from the menu, with **New repository**, and they appear in a group of their own.

How to connect. You clone and push with git as usual. Username: your email. Password: a **Git password** that you create yourself in the repository's **Access** tab. It is valid for all the repositories you have access to, it is shown **only once** when it is created, and it is worth saving it in git's credential manager (the keychain on macOS, Git Credential Manager on Windows), so it does not ask you for it again. If you lose it, you create another one: your Git passwords are managed from your profile.

The same password is also used to open and follow **Pull requests** from the terminal. It is valid for this and this alone: cloning, pushing and following pull requests.

From the repository page you browse the **Code**, the **Commits** and the **branches**, open and comment on pull requests and issues, and by attaching files (or pasting a screenshot into the comment), you bring them into the discussion.

For each person you choose the role: **viewer** (clone only), **editor** (can push) or **admin**.

Every push also ends up in a **backup copy** in Flow's storage, with the same redundancy as the files: the repository page tells you when it was last updated.

29 API tokens and command line

To have a program talk to Flow you need **machine tokens**, which you create from the admin console.

For each token you decide:

- whether it is **Read only** or **read and write**;
- whether it applies to **one space** or to all of them;
- whether it can be used only from **certain IP addresses**.

The secret is shown **only once**, when it is created. The console shows when it was last used and lets you **revoke it immediately**, so a token that is no longer needed can be closed in a moment.

For command-line use there is `fspool pull`, which keeps a copy of your archive on disk: it writes it atomically and also carries over deletions.

API tokens are something different from the **Git password**: that one is used to clone and push, and it does not open the API.

Also different from API tokens are **Ai assistant connections**: a token opens the whole API with your permissions, a connection opens to an assistant only the folders you list for it, and nothing else in Flow.

30 Users, roles and invitations

Users are managed from the **Admin console**.

Inviting. With **Invite user** you type the email address and choose the spaces the person will join on their first sign-in. They will receive an email with a link to create their own account and choose a password. Invitations not yet accepted stay visible in **Pending invites**, from where they can be **resent** (renewing the expiry date) or **revoked**.

The roles are three: **Owner**, **Administrator** and **Member**. The role says what a person can do in the company; the permission on the space ("can edit" or "read only") says what they can do with the files. They are two different things, and they combine.

Deactivate instead of deleting. Deactivating a user blocks their access but **leaves their files where they are**, and they can be reactivated when needed: it is the right way to go for someone leaving the company. To close an account for good, there is deletion.

Two things that really happen:

- **lost phone:** the administrator resets that person's two-step verification, and they set it up again at their next sign-in;
- **plan at full capacity:** when the users reach the maximum allowed, Flow says so straight away, so you know that extending the plan is all it takes to invite more.

What each person can open to an **Ai assistant** does not depend on their role here: in team spaces it is set by the list the administrator keeps in Admin console → Ai assistants.

31 Team spaces

A space is a container with a group of people inside it: you create it from the menu, with **New space**.

When you create it, you choose the **Name** (that of the department or the project, whatever you call it) and, if you like, an **icon** and a **Color**. It is not decoration: in a menu with ten spaces, the icon is the quickest way to recognize the right one. If you leave the color on **Automatic**, Flow assigns a stable one based on the name.

Right after creating the space you choose **the people**, each with "can edit" or "read only". Within the space you can then reserve single folders for a smaller group.

Renaming and changing the look can be done at any time. **Deleting a space requires it to be empty**: it is a protection against mass deletion done with a single click.

Ai assistants have a separate door: a team space can be opened to an assistant only if the administrator has put it on the list in Admin console → Ai assistants, folder by folder.

32 Quota and space used

The space used and the plan's total are shown at the bottom of the menu, always.

What counts is the real space taken up. Flow saves files in blocks, identified by their content: if the same content is present more than once (the same attachment passed around among colleagues, two copies of the same document in different folders), the block is stored **only once**. In the quota it counts once, not twice.

One thing to keep in mind: items in the **Trash** count towards the quota while they are there.

The administrator can set a **quota for the personal space** of each user, and gets an alert when the trash nears the quota.

33 Customizing the look

Your company's logo, color and background appear **on the public pages of share links and in the emails** sent to recipients. It is the part of Flow your customers see, and that is why you can dress it up.

- **Logo**: PNG, JPEG or WebP up to 512 KiB. It works best horizontal and on a transparent background. Without a logo, the Flow logo is used.
- **Accent color**: in the `#rrggbb` format. Leaving it empty goes back to the default color.
- **Background**: up to 2 MiB, it fills the page behind the card. Without one, the default light grey stays.

Each element can be removed, going back to the default value, at any time.

34 Bringing your own storage

If your company wants its files to be **on its own infrastructure**, it can be done: an Azure account, S3-compatible storage, or an on-site NAS with MinIO, which exposes an S3 endpoint.

Flow keeps working exactly as before: what changes is where the bytes end up, not how you work.

The connection is guided: you give the storage type and its address, choose what to move, and the import starts. **You can go back**: the files already uploaded move to your own storage, and with “Re-import everything” they come back to the platform.

Along with the data, their custody moves too: the **availability, redundancy and backups** of the storage are the responsibility of whoever provides it.

35 Importing data from another service

If your files are on another service today, you bring them into Flow with a **one-off copy**: the originals **stay intact** where they are, and there is no deletion to authorize.

From then on, the imported files are Flow files like all the others: synced to the Mac and to Windows, searchable in their content too, with their versions.

It is worth doing it before you ask your colleagues to change their habits: that way, on their first day in Flow, they find the material already in place.

36 The activity log

The log lists the most recent **administrative actions**: who did them and when. Roles changed, users invited, activated or deactivated, spaces created or renamed, tokens and Git passwords created or revoked, plan changes, files blocked by the antivirus, forced lock releases.

You filter by period (today, seven days, thirty days, all time) and search by user or by action.

For “what happened to this document” there are the **Versions** and the **Time machine**, which tell the story file by file.

Ai assistants also go into the log: when a connection is created, changed or revoked, and **every read** an assistant makes: which connection, which file, when. It cannot be turned off.

37 Ai assistants

An Ai assistant (Claude, ChatGPT, Cursor, Codex) can be connected to Flow and work on documents where they are, instead of having them uploaded to the chat by hand.

The connection is created in **Account → Ai assistants** and opens to the assistant **only the folders you list**: outside those, nothing exists for it. By default it only reads; it can edit only if you choose so. In team spaces it is the administrator who sets, in **Admin console → Ai assistants**, which folders can be opened and whether for reading only or for writing too.

The folders and files an assistant sees carry a small icon next to their name, and every read stays in the activity log: whoever works there knows it.

The rest (how each assistant connects, what it can and cannot do, what the administrator decides) is in the dedicated guide.

38 Subscription, plan and billing

The purchase asks for the **Plan**, the **billing cycle** (monthly or yearly) and the invoicing details: company name, address, VAT number and, for Italian electronic invoicing, SDI code or PEC. You pay by card (Apple Pay and Google Pay too), SEPA Direct Debit, PayPal, Amazon Pay or Revolut Pay, which renew automatically; on yearly plans also by bank transfer or Satispay, and then the renewal is paid by hand from the notice that arrives 15 days before. Klarna is not offered: it only accepts purchases by consumers, and Flow is bought as a company.

After the purchase a confirmation email arrives and you can sign in right away.

The plan also decides **which features are available**: in this guide, the sections that depend on the plan say so.

To change plan, administrators open **Admin console > Plans / payments > Change plan**, from the browser (the iPhone and Android apps have no payments). A **higher** plan applies right away: only the difference for the days left until the renewal is paid, and the renewal date does not change. A **lower** plan and switching between **monthly and yearly** apply from the next renewal; until then the current plan stays, and a queued change can be cancelled. The switch happens without any service interruption.

39 The free trial

To try Flow before choosing a plan, your company requests the **Free trial** by writing to us from the [Contact](#) page: a name, an email and a couple of lines on what you want to try are all it takes. No credit card is needed.

We activate the trial ourselves: we create your company's Flow and send the invitation to the administrator, who signs in as explained in the [Getting started](#) guide and then invites the colleagues. We tell you the **duration, people and space** of the trial when we activate it; the features are those of the plans, active from the first day.

During the trial, **administrators** see in the app how many days are left until the end; the other users work as usual. Before the trial ends, the administrators receive a reminder email.

To continue, just choose a plan: from the email or from **Admin console > Plans / payments > Choose a plan**, in the browser. Moving to a plan does not move anything: the files, spaces, people and settings stay, and only the limits and features change, to those of the chosen plan. If you need more time, ask to extend the trial.

If you do not choose a plan, when the trial ends Flow switches to read only: you can sign in, read and download files, and syncing on the computers continues. Uploads and the plan's features stop, including the connections with Ai assistants and with Git. The administrators see this written in the app, with the date.

When deletion of the data is planned after the read-only period, the administrators first receive an email **with the date**: until that day, choosing a plan, or asking to extend the trial, is enough, and nothing is lost.

40 Malware scanning

Every uploaded file is **scanned as it arrives**, and the verdict is read before the file is recorded: **an infected file never becomes visible to anyone**, not even for an instant.

Blocks go into the **Activity log** as "File blocked by the antivirus", so the administrator knows what was stopped and when.

41 Asking for help

Support, in the menu, opens a form: you choose the type of request (sales, technical support, billing or other), write the message and send it. The answer arrives at your email.

The requests you have already sent stay listed there, with their status.

Before writing, there are two places where the answer might already be: the section of this guide about your problem, and the **Getting started** guide if the difficulty is with signing in or installing.