

# SimboVara Workflow Customization: Configure Website URLs for RAG (Answering Patient Questions) - Admin Panel

## Purpose

Teach Copilot what to say by letting it read your public site and PDFs used by your practice to answer patient questions from that.

## How it works

- Paste one or more URLs. Separate with new lines, spaces, or commas.
- Copilot crawls the sites recursively.
- Up to **200 URLs** are stored in Copilot memory for answers.
- Supported formats: **HTML pages** and **PDF files**.

## Steps

1. Go to Admin → Copilot Settings → **Workflow Customizations**.
2. In **Website URL**, paste links to your website and any relevant PDFs.
  - Example entries:
    - <https://www.exampleclinic.com/>
    - <https://www.exampleclinic.com/patient-pre-visit-guidelines.pdf>
    - <https://www.exampleclinic.com/insurance.pdf>
    - [https://simbo.ai/SimboConnect\\_Features\\_v2p2.pdf](https://simbo.ai/SimboConnect_Features_v2p2.pdf)
3. Click **Save**.

## Examples of good content to include

- FAQs, patient instructions, new patient packets, insurance or self-pay related, providers, services provided, location specific details, clinic policies.

# Tips and Good practices

- Use stable, public links. Avoid pages that require a login.
- Keep the list focused on patient-facing guidance to avoid mixed messages.
- Replace outdated PDFs rather than adding multiple versions.

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