



Lizzy Manual

(Web, Word and Outlook)

A simple guide
to Lizzy's key features

September 2025 edition

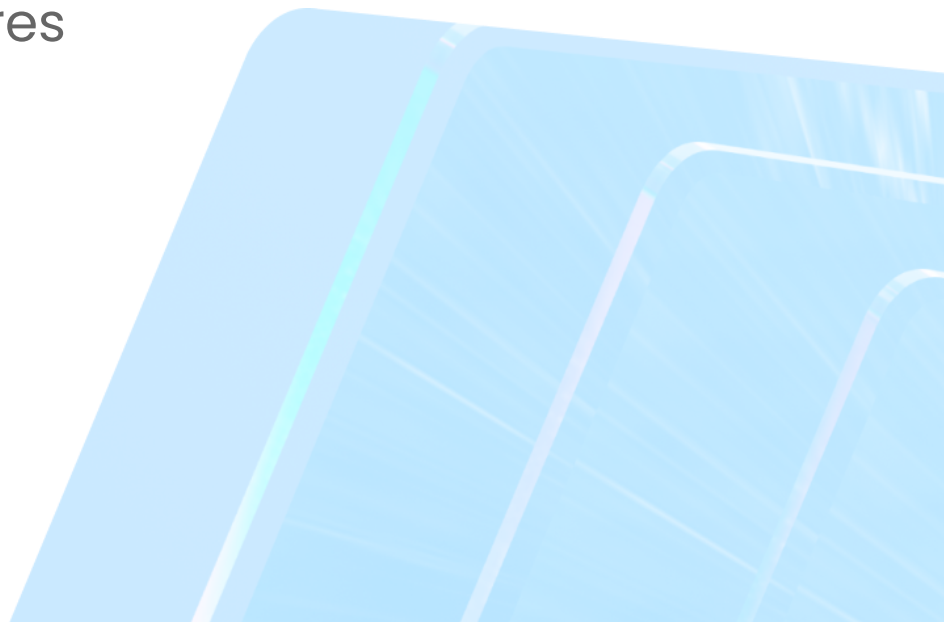


Table of Contents



Lizzy Web

- Compatibility & Getting Started
- Dashboard Overview
- Input Bar & Prompt Tools
- Uploading & Working with Files
- Switching Models
- Quick Actions
- Managing a Chat
- Language & Interface Settings

Lizzy Word

- Compatibility
- Getting started
- Interface Overview
- Input Bar & Prompt Tools
- Uploading & Working with Files
- Switching Models
- Home Tab
- Chat Tab
- Quick Actions Tab
- Proofread Tab
- Add-in Settings

Lizzy Outlook

- Compatibility & Getting Started
- Interface Overview
- Input Bar & Prompt Tools
- Switching Models
- Home Tab
- Chat Tab
- Add-in Settings

Lizzy Web

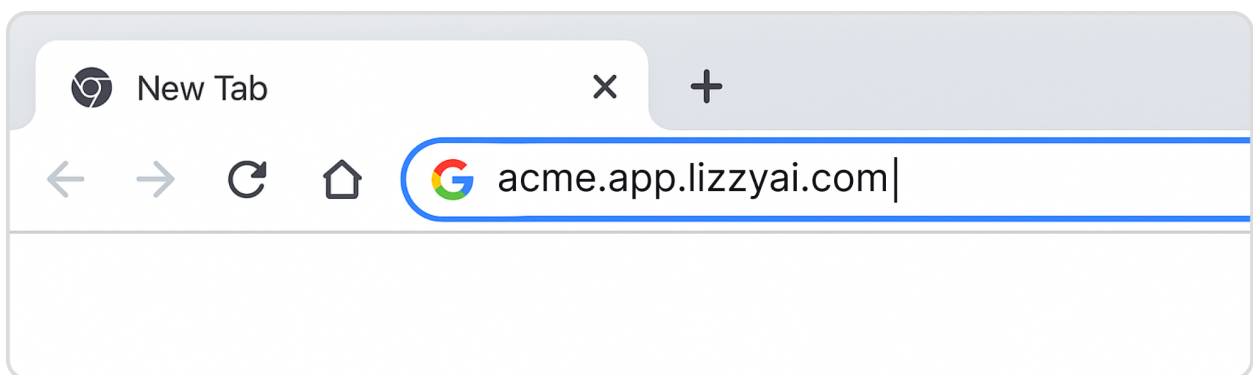
⚠ Compatibility

Compatible with **Chrome and Edge browsers**. For optimal performance, please ensure your browser is up to date.

➔ Getting started

To get started:

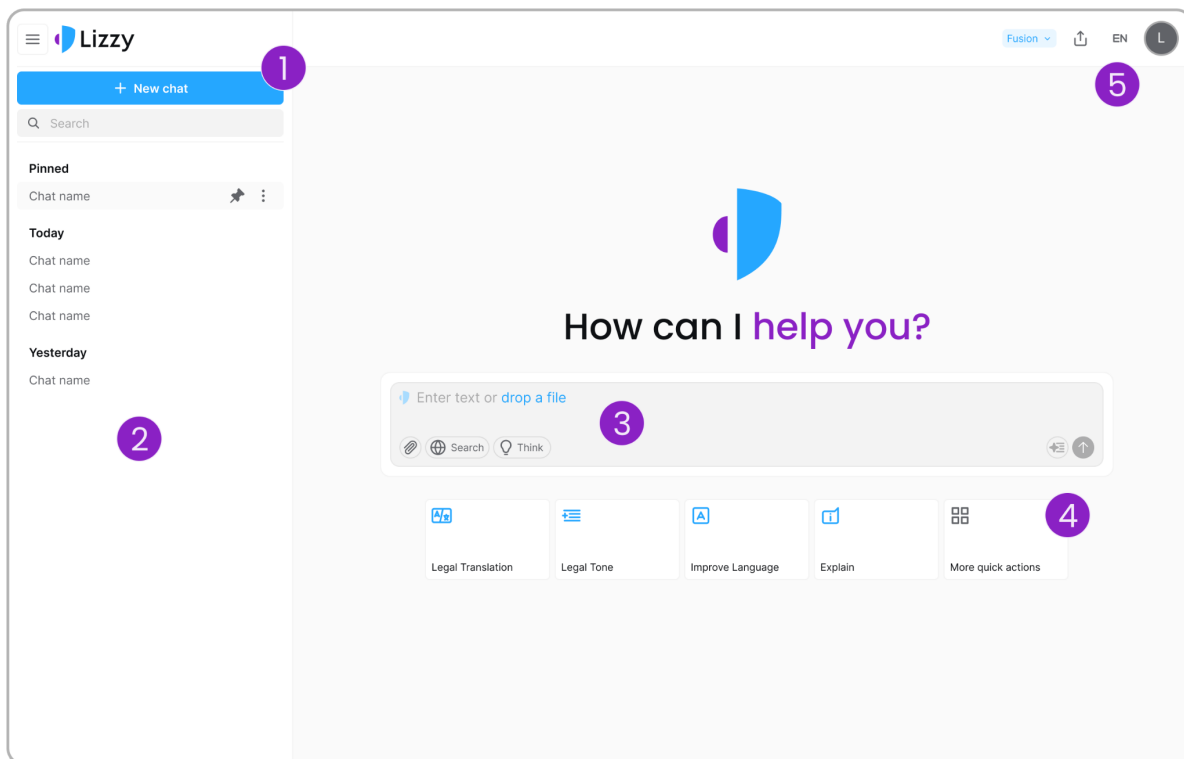
- **Open your web browser.**
- **Enter your company's address** followed by `.app.lizzyai.com` (for example: `acme.app.lizzyai.com`).
- **Sign in** with your corporate email.
- Start using Lizzy



Dashboard Overview

Lizzy Web opens on the main dashboard. Here's what you'll find:

- 1. New Chat:** Start a fresh conversation anytime.
- 2. Chat Panel:** Access pinned, recent, and ongoing chats.
- 3. Input Bar:** Type your request or drop a file. Switch between modes using quick toggles.
- 4. Quick actions:** Use predefined presets like Legal Translation or Explain.
- 5. Settings Panel:** Change model, language, theme, and more.



Input Bar & Prompt Tools

This is where you interact with Lizzy — type prompts, attach files, or enhance your input.



◆ **Think & Search Modes**

Think and Search are optional modes you can activate before sending a prompt:

- **Think** – Lizzy will think before it answers (it will analyze deeper, but be slower to respond).
- **Search** – Uses online sources to add context to your request.

Activate either mode by clicking its icon below the input bar. Only one mode can be active at a time.

◆ **Prompt Optimizer**

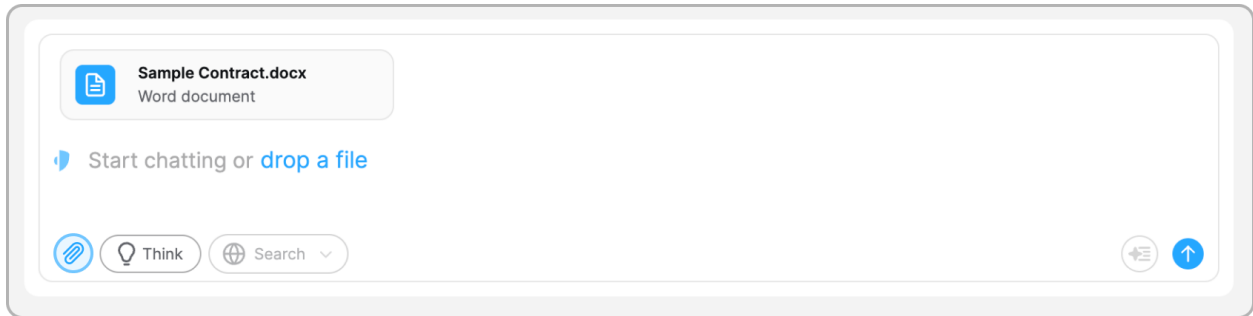
Click **Prompt Optimizer** to rewrite your prompt before sending.

It improves clarity, tone, and structure — especially useful for long or messy inputs.



Uploading & Working with Files

You can upload legal files (PDF, DOCX, etc.) by dragging them into the dashboard or clicking the attachment icon.



Once uploaded, you can:

- Ask questions about the file
- Summarize, compare or otherwise analyze the file
- Run legal workflows on the file

You can upload multiple files into the same chat. Each file stays linked to the chat it was added in.

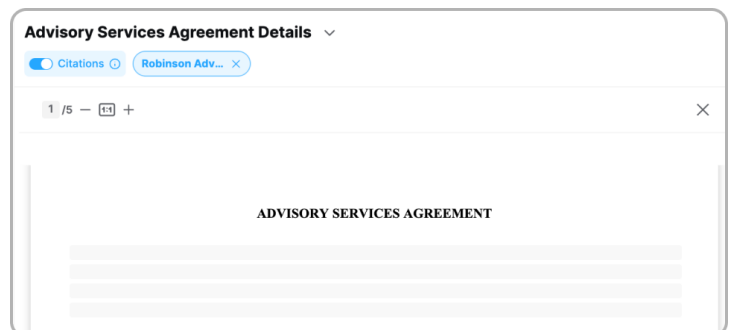
◆ Using the Document Reader

Click a document label in the top bar to open it in the reader.

In the reader, you can:

- View and scroll through the full document
- Select and copy text

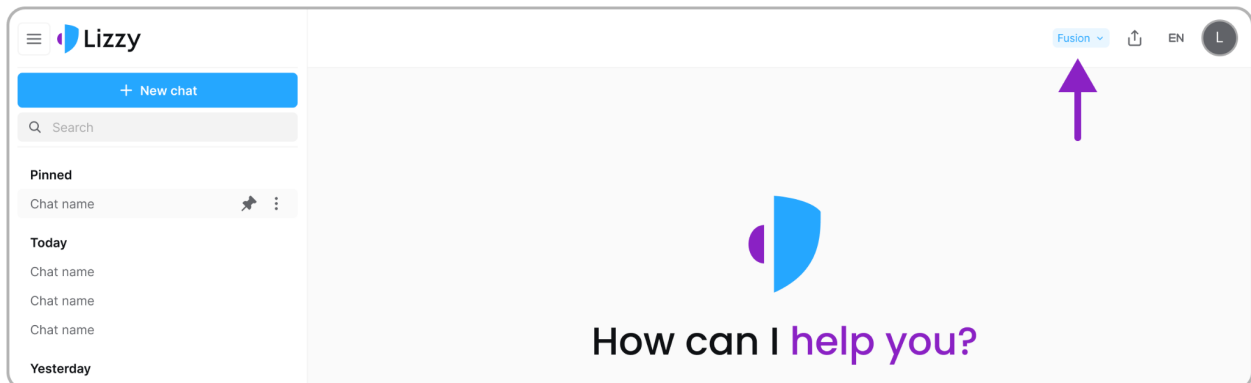
Click **X** in the corner to close the reader.



⚡ Switching Models

Change the model to fit your legal task.

Lizzy supports multiple AI models. You can switch anytime from the top-right dropdown.



◆ Why Switch Models?

Different models perform better at different tasks.

You might switch models to:

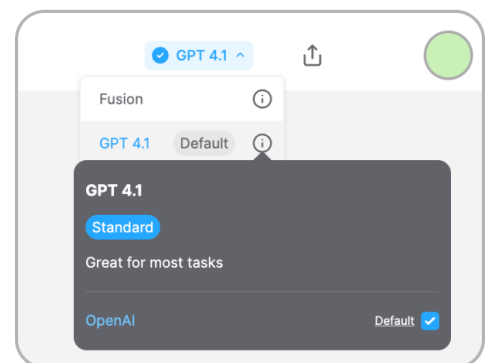
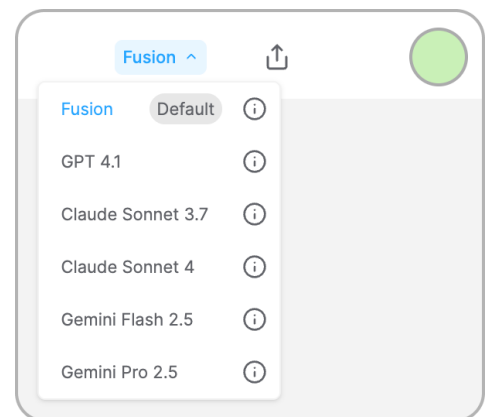
- Get more accurate legal reasoning
- Handle long or complex documents
- Use your preferred model

◆ Setting the Default Model

The default model is automatically used for chat, proofreading, and presets.

To set a default model:

- Click the model dropdown (top right)
- Hover over a model
- Click "Default" in the bottom right of the popup
- ☒ A checkmark will confirm your choice.



Quick Actions

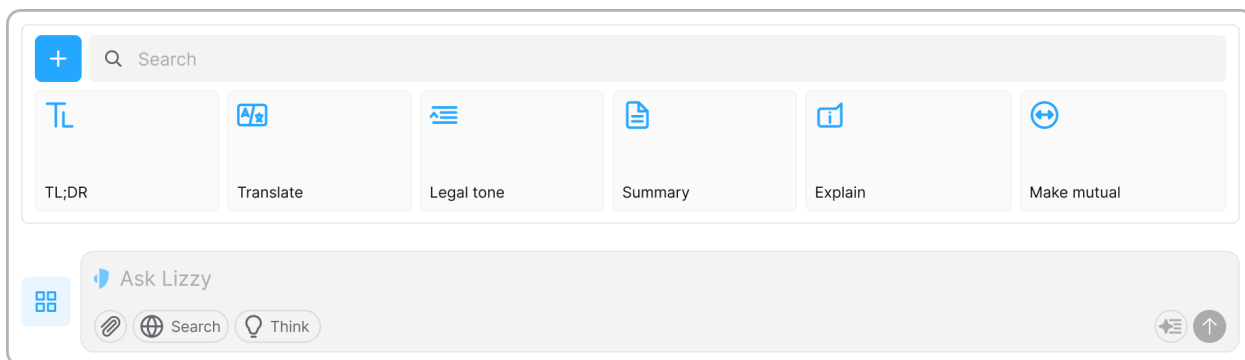
Use built-in tools to speed up common legal tasks — no typing required.

Click the **Icon** next to the input bar to open the Quick Actions menu.



♦ What you can do

- **Run a built-in preset** — Start from one of Lizzy's pre-made template
- **Create your own** — Save your favorite prompt to reuse later
- **Edit a preset** — Change content of your presets
- **Use presets with context** — Run presets on selected text or dropped files



♦ Saving a preset

- Click the **+** button in the Actions Panel and enter your prompt
- Or click the **dropdown** on any sent message → **Save as preset**

◆ Choosing Context for a Preset

When using a preset, you can choose the context it applies to:

- **Document** — One of the documents currently attached to the chat
- **Last Lizzy response** — The latest AI reply in the conversation
- **Selected text** — A part of the document *or message* you've selected
- **Entered text** — A custom input you type manually

Summary ×

Select context for the prompt preset

 **Contract**
DOCX

 **Last Lizzy response**
"ABC Company is of..."

 **Selected text**
"ABC Company is of..."

 **Entered text**
"ABC Company is of..."

Simple summary	One sentence
Outline	Table
Bullets	Comprehensive
TL;DR	Abstract

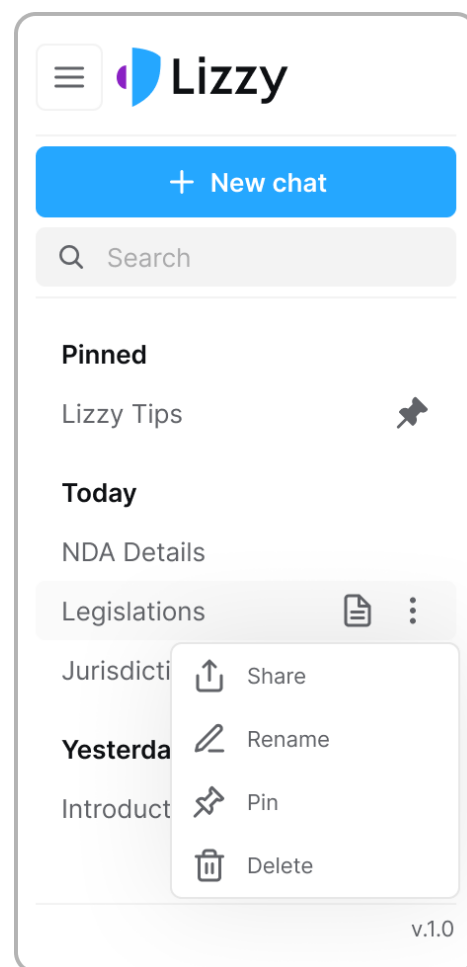
Select the context source at the top of the preset screen **before choosing** how you want the output (e.g. summary, outline, bullets).

Managing a Chat

Each chat in Lizzy saves your full conversation history — including messages, files, and context. You can **rename, pin, or share** a chat for future use.

◆ What you can do

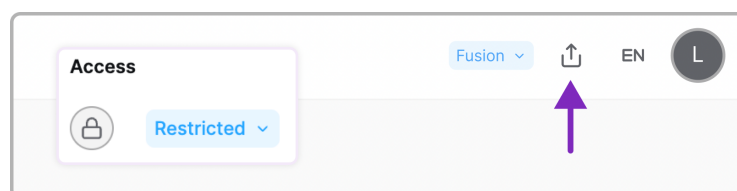
- **Share** — Copy a link for **anyone** or share **privately with your team**
- **Rename** — Give a chat a custom name
- **Pin** — Keep key chats at the top of your sidebar
- **Delete** — Remove chats you no longer need



◆ Share a chat

You can also share a chat from the top bar. Click the **share icon** in the top-right corner to get a link. You have the following sharing options:

- Anyone with the link
- Restricted to your team

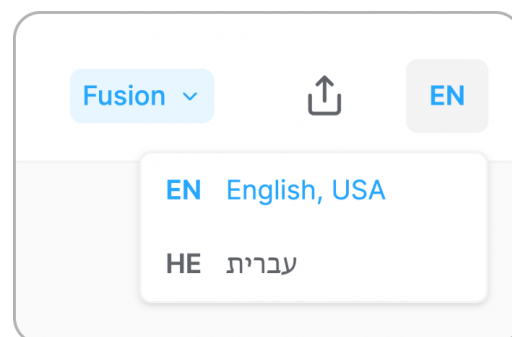


⚙️ Language & Interface Settings

You can customize Lizzy's interface and behavior to fit your preferences.

◆ Language

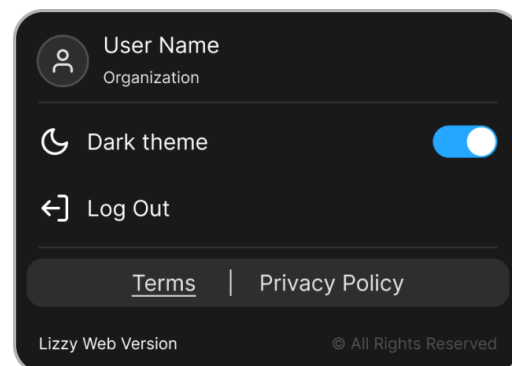
Click **EN / HE** in the top-right corner to change Lizzy's interface language.



◆ Theme (Light / Dark Mode)

To change Lizzy's appearance:

- Click your profile icon (top right)
- Choose between **Light** or **Dark** mode



Lizzy Word

Compatibility

Compatible with **Word for Microsoft 365 (Windows), updated with at least the October 2024 release**. For the best performance, please ensure that your Office installation is updated to the most recent release.

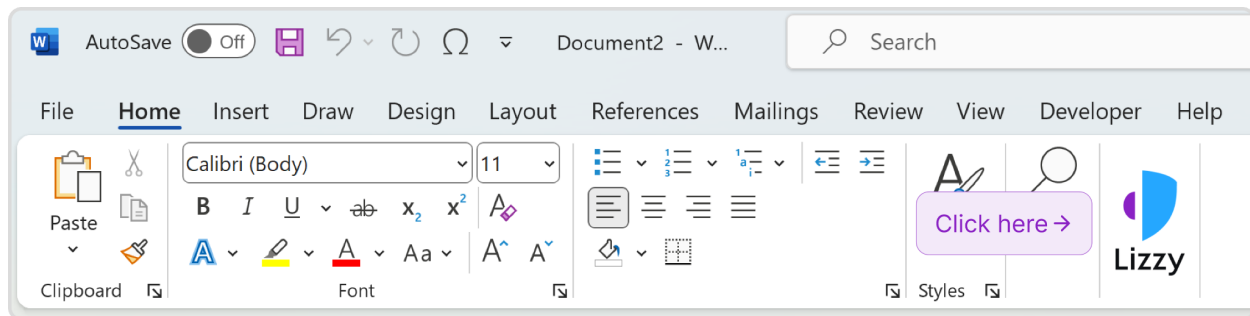
Perpetual-license versions of Word (including Word 2016, Word 2019, and Word 2021) are not supported.

Use on **Microsoft Word for Mac** is partially supported: the software generally functions, but performance may be limited and compatibility has not been thoroughly tested.

Getting started

To open Lizzy inside Microsoft Word:

1. **Open any Word document**
2. **Go to the Home tab in the top ribbon**
3. **Click the Lizzy icon**
4. **The Lizzy sidebar will appear on the right side of the screen**



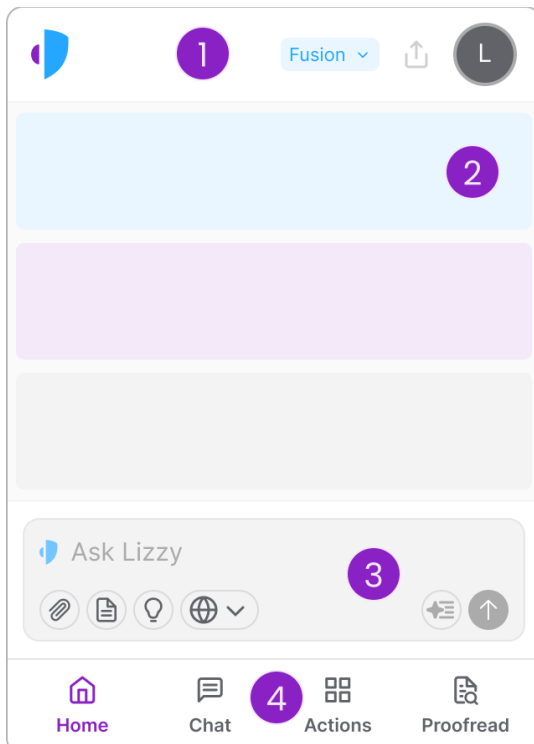
If you don't see Lizzy, go to **Insert → My Add-ins → Lizzy** or check with your IT admin if it's enabled for your account. If Lizzy Word is enabled on your account and you still can't see it, try the following:

- Verify you are signed in to Office 365 with the same account your IT admin enabled.
- Restart your computer.

Interface Overview

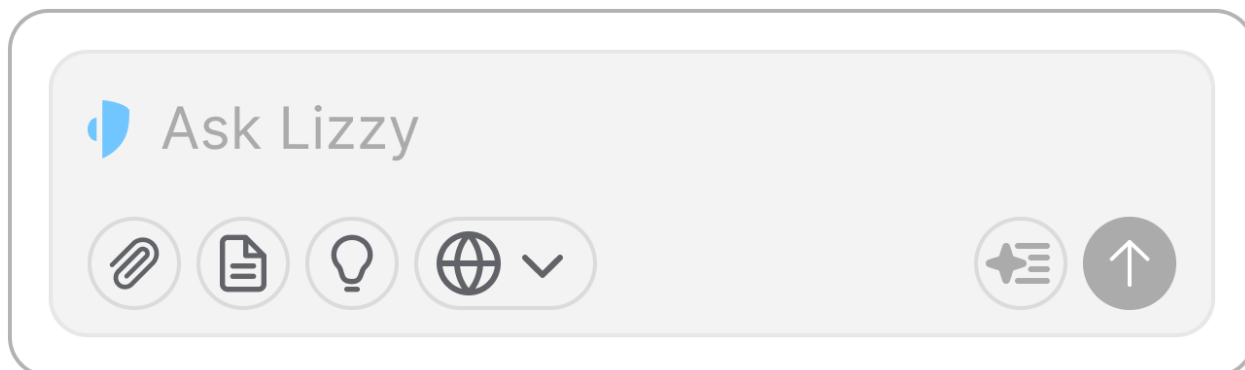
When you open Lizzy in Word, you'll see a sidebar with four main tabs at the bottom. Here's what you'll find:

1. **Settings Panel:** Change model, language, theme, and more.
2. **Widget Area:** View automatic insights for quick reference, summary, and language check
3. **Input Bar:** Type your request or drop a file. Switch between modes using quick toggles.
4. **Tab Bar:** switch between Home, Chat, Actions, and Proofread to access different tools and workflows:
 - **Home** – Widgets for quick reference, summary, and language check
 - **Chat** – Ask questions about the document
 - **Actions** – Run Quick Actions like translate, rewrite, simplify
 - **Proofread** – Scan and edit legal text directly in your doc



Input Bar & Prompt Tools

This is where you interact with Lizzy — type prompts, attach files, or enhance your input.



◆ **Full Document Context Button**

Click this button to use the **entire Word document** as context for your prompt.

Useful when:

- You're referring to multiple clauses
- You want Lizzy to consider the full document structure
- You're not selecting a specific paragraph

Note: You can't use **Search** mode while full document context is active.

◆ **Think & Search Modes**

Think and Search are optional modes you can activate before sending a prompt:

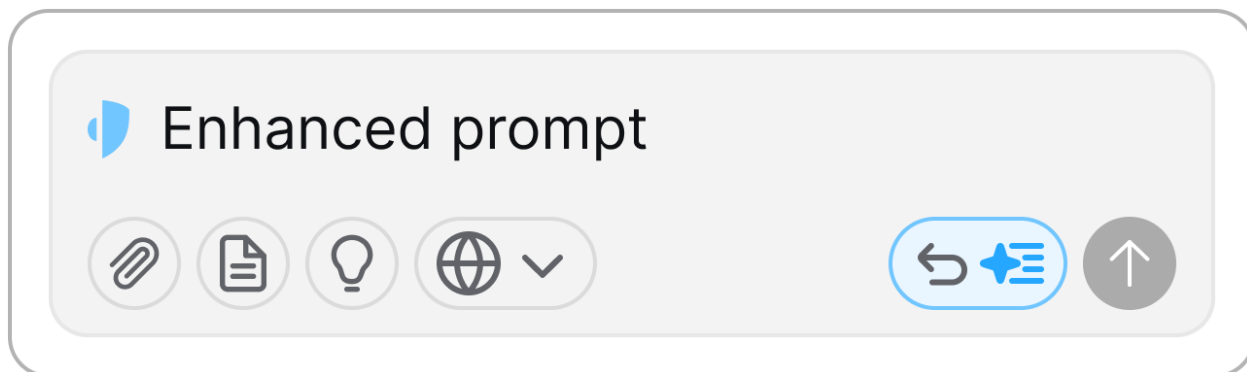
- **Think** – Uses more time for a more precise answer
- **Search** – Uses online sources to add context to your request.

Activate either mode by clicking its icon below the input bar. Only one mode can be active at a time.

◆ Prompt Optimizer

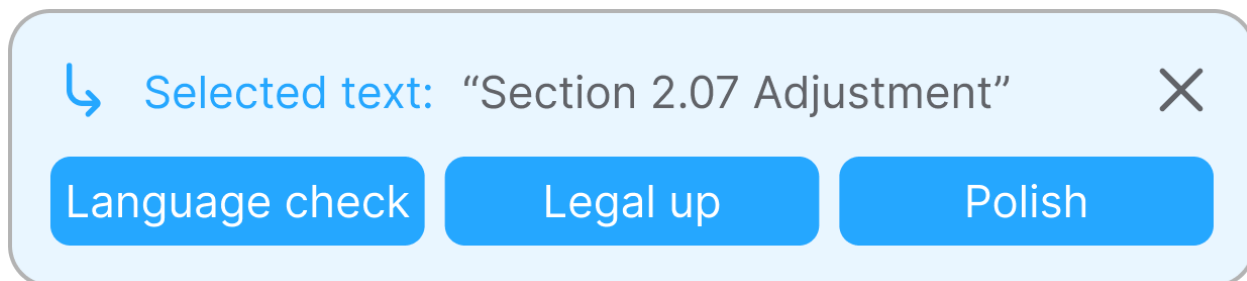
Click **Prompt Optimizer** to rewrite your prompt before sending.

It improves clarity, tone, and structure — especially useful for long or messy inputs.



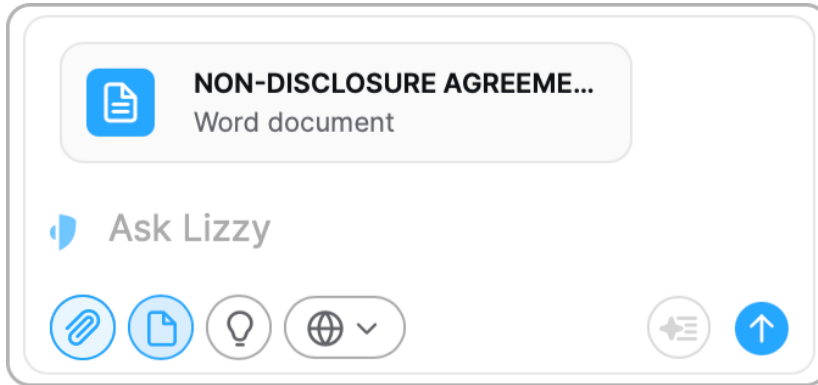
◆ Using the Selected Text Frame

When you **highlight any text in the document**, a blue frame appears offering quick preset actions — including **Language Check**, **Legal up**, and **Polish**.



Uploading & Working with Files

You can add legal documents (PDF, DOCX, etc.) to Lizzy in Word using the **attach button** in the input bar.



Once uploaded, you can:

- Ask questions about the file
- Run Quick Actions on it
- Use the full document as context for chat

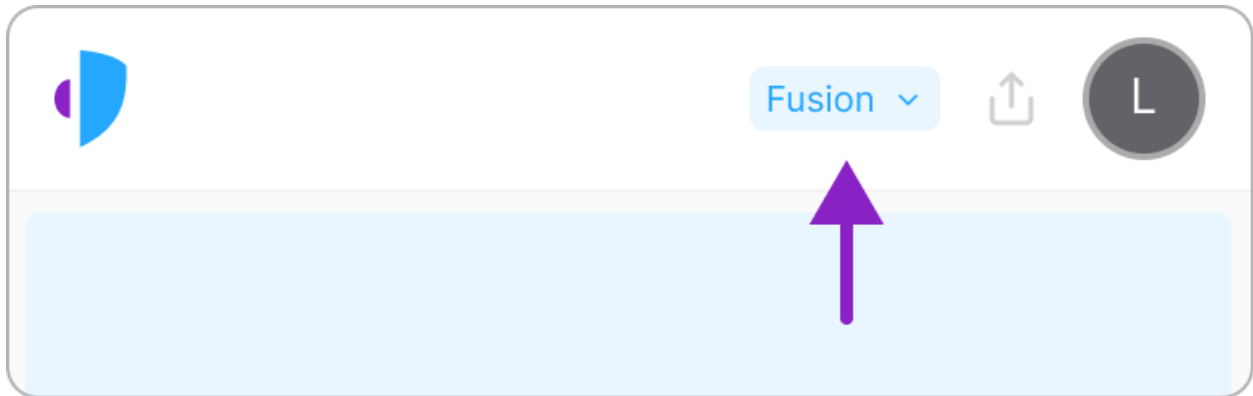
Each file stays linked to the chat it was added in. It will **not appear** inside the Word interface or document preview.

Note: The full document reader (used in the web app) is **not available** in the Word add-in.

Switching Models

Change the model to fit your legal task.

Lizzy supports multiple AI models. You can switch anytime from the top-right dropdown.



◆ Why Switch Models?

Different models perform better at different tasks.

You might switch models to:

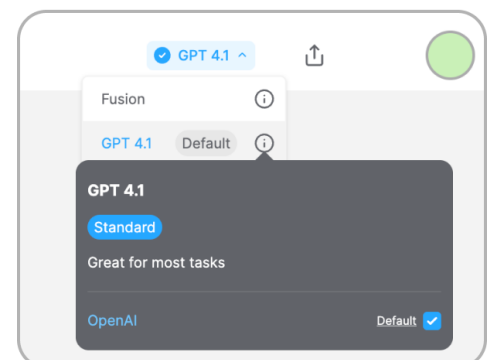
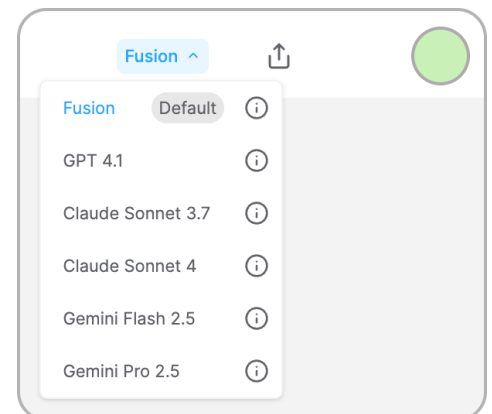
- Get more accurate legal reasoning
- Handle long or complex documents

◆ Setting the Default Model

The default model is automatically used for chat, proofreading, and presets.

To set a default model:

- Click the model dropdown (top right)
- Hover over a model
- Click "Default" in the bottom right of the popup
- ☒ A checkmark will confirm your choice.

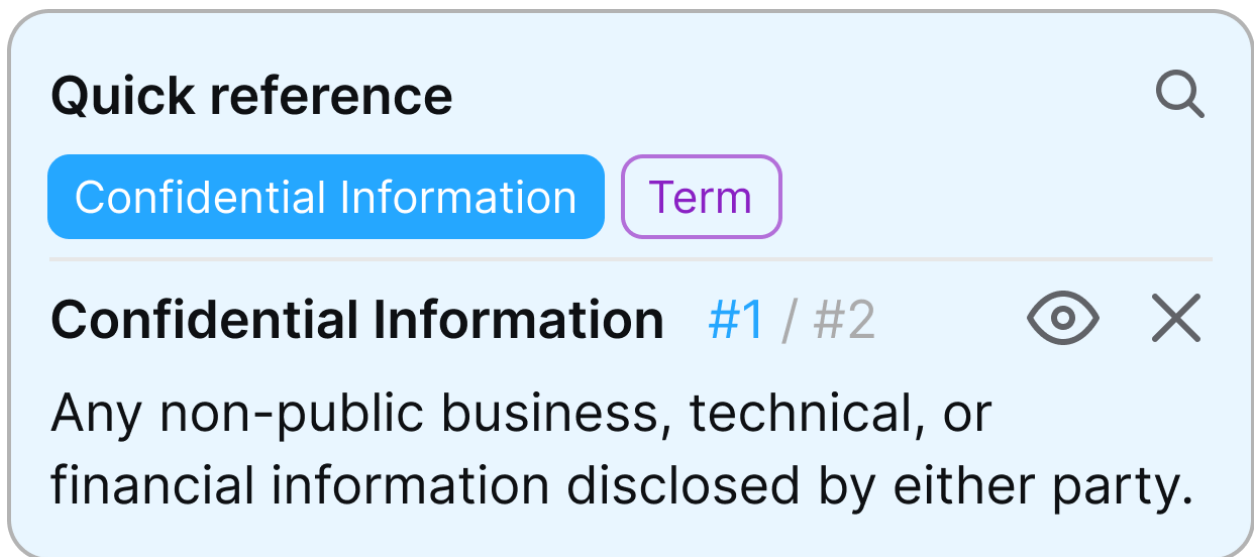


Home Tab

When you open Lizzy in Word, the Home tab displays smart widgets that instantly analyze your document and provide useful insights.

◆ Quick Reference

Quick Reference detects **defined terms** and shows how they appear throughout the document.



- **Purple labels** indicate where the term is originally defined
- **Blue labels** show where the term is referenced later

Click any label to preview the definition and see it in context.

Use the **Eye icon** to jump to the location in the document.

Use the **Search icon** — Start typing to filter and see matching detected terms and definitions.

♦ Quick Summary

Quick Summary provides an explanation of a section, selection, or the entire document.

Quick summary

Section 1

English ▼

This agreement outlines the terms of a partnership between two companies to develop a new legal tech solution.

- Automatically summarizes the **clause or section under your cursor**
- Uses the **document's language by default**, but you can change it manually
- If you **select text**, a **"Summarize selection"** button appears in the widget
- You can also summarize the **entire document** via Quick Actions

♦ Language Check

Language Check helps improve clarity, grammar, and legal phrasing — without changing legal meaning.

Language check

Section 1



The Consultant shall not disclose any confidential information received from the Company.

Replace

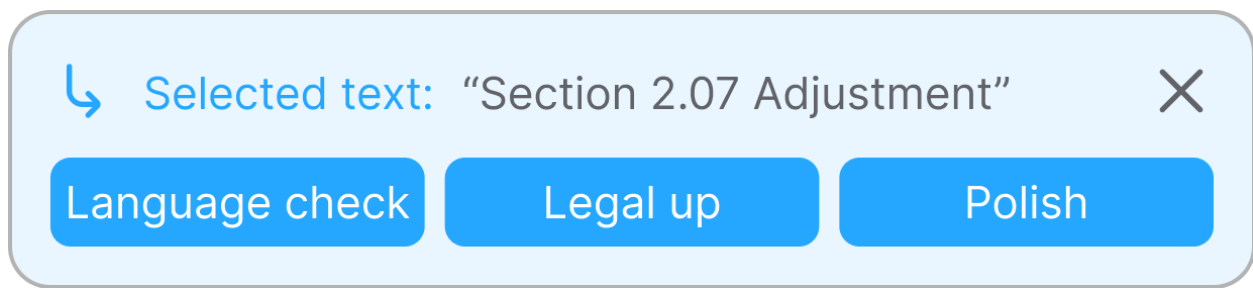


Full document scan

- Automatically checks **the clause under your cursor**
- Suggests edits for improved readability and precision
- Click **Replace** to apply the suggestion, or copy it manually
- Use **Full document scan** to review the entire file
- Click the **three-dot menu** (...) to adjust how the text is analyzed

Note: To check a specific part of the text, use either:

- the **Language Check preset** from the Chat or Actions tab.
- or the **blue action frame** that appears after selecting text.



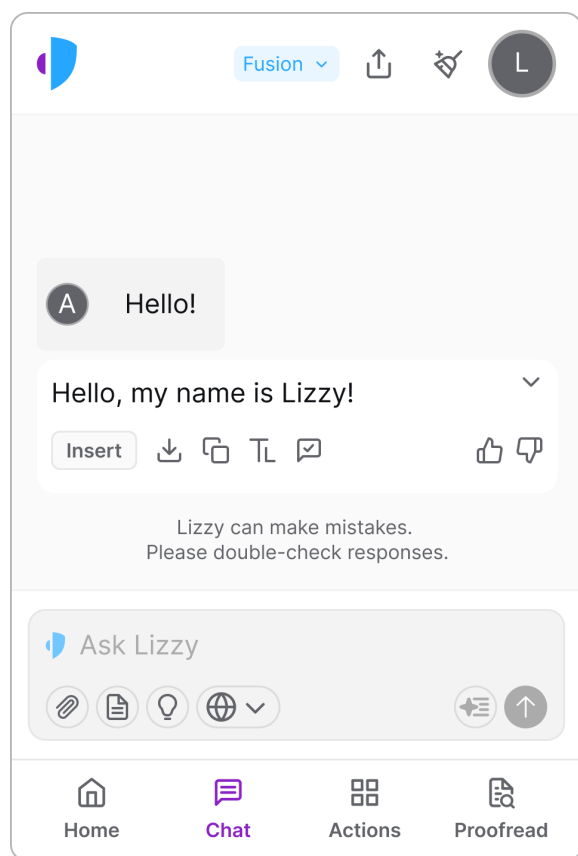
Chat Tab

The Chat tab is your space to ask, explore, and generate — with optional context from your document, previous messages, or uploaded files. It shows the full history of interactions, including responses to prompts submitted via:

- The **Input Bar** from any tab
- The **Language Check** widget (when full document scan is used)
The **blue frame** that appears after selecting text and choosing a preset (e.g. *Language Check, Polish*)

You'll find **Clear Chat** and **Share Chat** in the **top bar** of the Chat tab:

- Click **Clear Chat** to reset the conversation
- Click **Share Chat** to copy a link to the chat

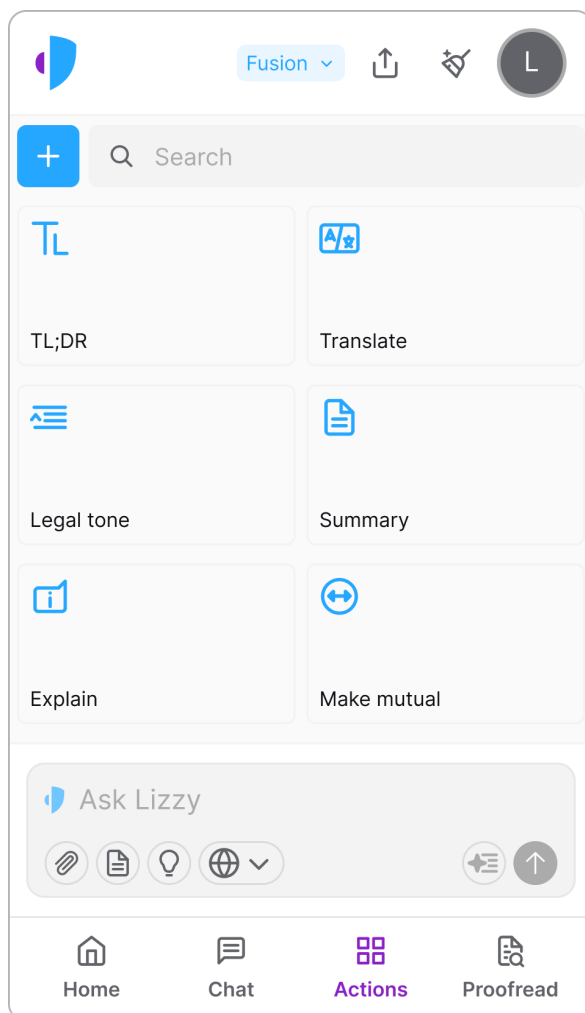


Quick Actions Tab

This tab gives you fast access to **presets**: pre-defined or custom prompts you can run with one click. Same interface as on web, but opened directly as a separate **tab** in the add-in.

♦ What you can do

- **Run a built-in preset** — Start from one of Lizzy's pre-made template
- **Create your own** — Save your prompt to reuse later
- **Edit a preset** — Change content of your presets
- **Use presets with context** — Run presets on selected text or dropped files



◆ Saving a preset

- Click the **+** button in the Actions Panel and enter your prompt
- Or click the **dropdown** on any sent message → **Save as preset**

◆ Choosing Context for a Preset

When using a preset, you can choose the context it applies to:

- **Document** — One of the documents currently attached to the chat
- **Last Lizzy response** — The latest AI reply in the conversation
- **Selected text** — A part of the document *or message* you've selected
- **Entered text** — A custom input you type manually

Summary

×

Select context for the prompt preset

 **Contract**
DOCX

 **Last Lizzy response**
"ABC Company is of..."

 **Selected text**
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 **Entered text**
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Simple summary

One sentence

Outline

Table

Bullets

Comprehensive

TL;DR

Abstract

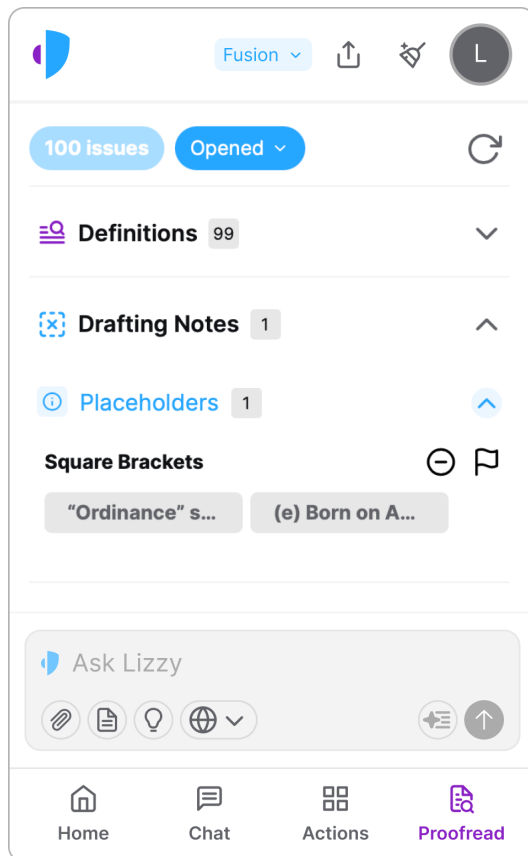
Select the context source at the top of the preset screen **before choosing** how you want the output (e.g. summary, outline, bullets).

Proofread Tab

Get a **full scan of your document** for grammar, clarity, and legal tone issues — all in one place. This tab gives you a high-level overview of suggested improvements, and lets you apply changes with a single click.

Use it to catch:

- **Definitions** — Detect multiple or unused definitions
- **Drafting Notes** — Spot informal comments or placeholders
- **Language Check** — Review for grammar, spelling, tone, and clarity



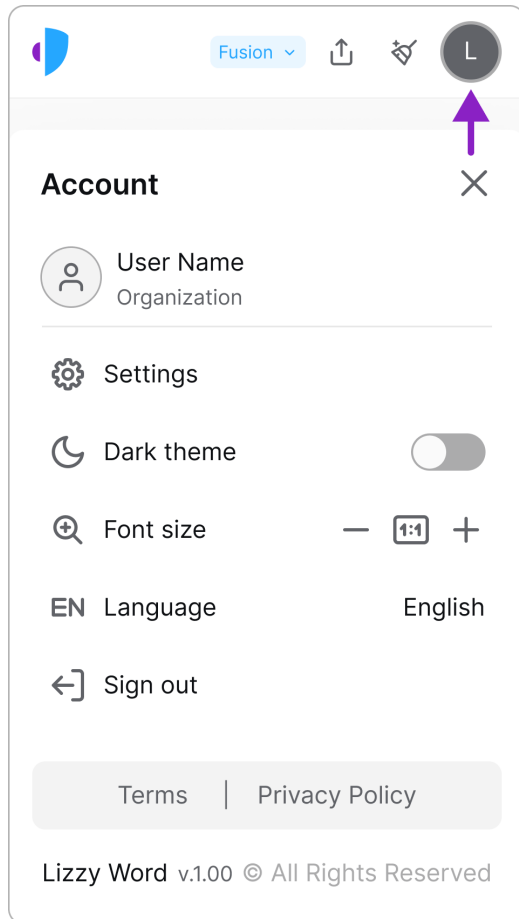
◆ Choosing Context for a Preset

- **Use the Flag icon** to mark issues for follow-up.

- You can also **Ignore** issues to hide them from view.
- Use the dropdown filter to switch between **Opened, Ignored, and Flagged items**.
- **Click Fix or Fix all where available.**
- **Click the Eye icon** to jump to that section in the document.
- **Use the Refresh icon  to rescan after edits.**

⚙️ Add-in Settings

To open Add-in Settings, click on your profile icon in the top-right corner.



◆ Interface Settings

- **Dark theme** — switch between light and dark mode.
- **Font size** — increase or decrease UI font size.
- **Language** — choose interface language.

◆ Add-in Behavior Settings

- **Track changes when inserting** — whether suggestions are added with tracked changes.

- **Track changes by word** — when enabled, suggested edits appear grouped by **whole words** in Compare View (not individual characters).
- **Load last chat** — automatically restore the previous chat session when opening the add-in.

Lizzy Outlook

⚠ Compatibility

Lizzy for Outlook is compatible with **Microsoft 365 on Windows**.

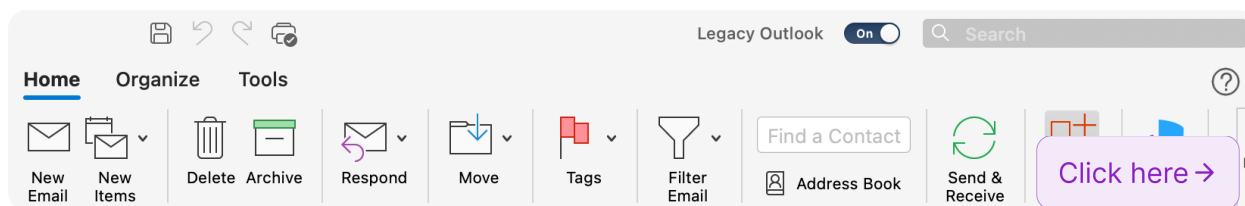
For the best performance and stability, we recommend using it with **Outlook (Legacy)** — where the add-in runs more smoothly and reliably.

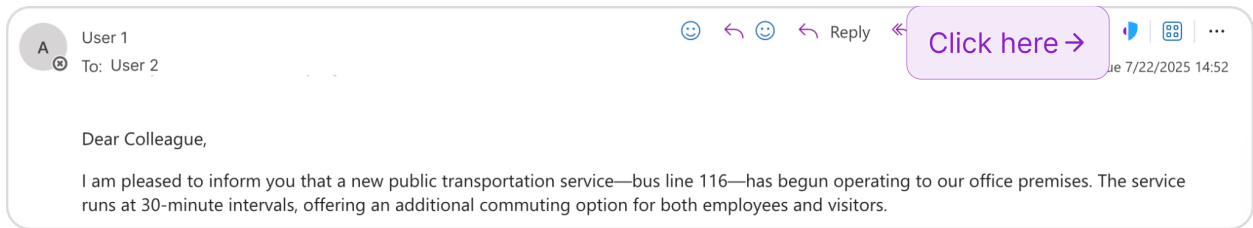
🖥 Getting started

To open Lizzy inside Microsoft Outlook:

1. Open an email — either a **received message or thread**, or the screen where you're **writing a new message**
2. Click the **Lizzy** icon in the Outlook ribbon (top right)
3. The Lizzy sidebar will open on the right side of the screen

Lizzy will automatically adjust based on what you're doing — analyzing incoming emails or helping you draft new ones.



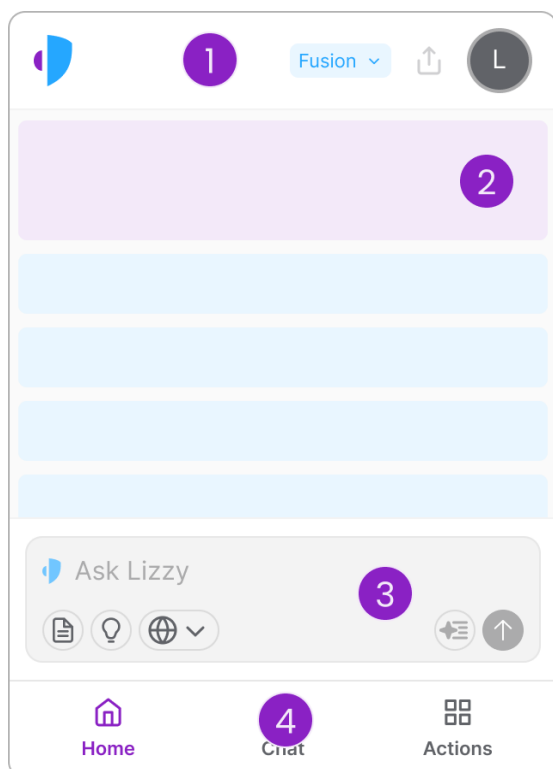


If you don't see Lizzy, open **All Apps in Outlook**, search for **Lizzy**, and select it. If it still doesn't appear, check with your IT administrator to confirm that it's enabled for your account.

Interface Overview

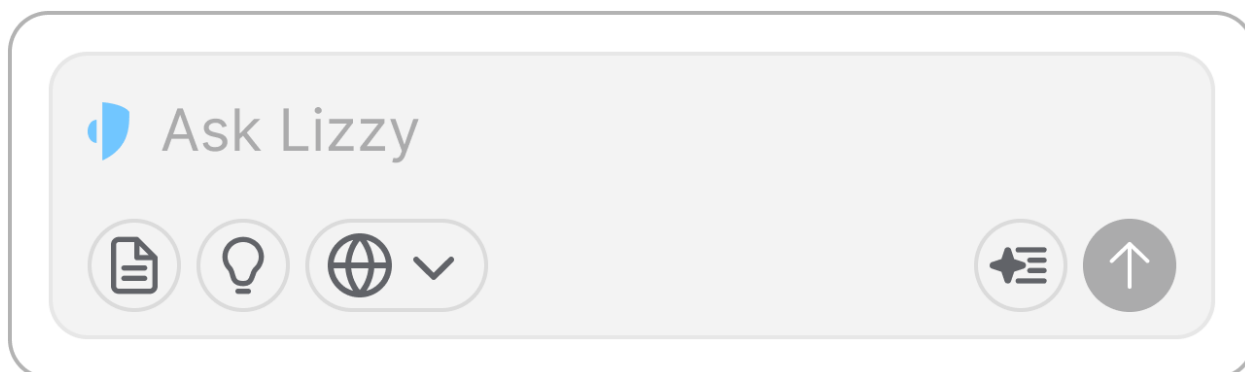
When you open Lizzy in Outlook, you'll see a sidebar with three main tabs at the bottom. Here's what you'll find:

1. **Settings Panel:** Change model, language, theme, and more.
2. **Message Tools Area:** This area adapts to the current context — either when reading or writing an email.
3. **Input Bar:** Type your request or drop a file. Switch between modes using quick toggles.
4. **Tab Bar:** switch between Home, Chat and Actions to access different tools and workflows:
 - **Home** – Tools for analyzing emails.
 - **Chat** – Ask questions about the current email or draft a new message with Lizzy's help.
 - **Actions** – Use Quick Actions like *Translate* or apply your *Saved Presets* to selected text.



Input Bar & Prompt Tools

This is where you interact with Lizzy — type prompts, attach files, or enhance your input.



◆ **Attachment Context Button**

Click this button to use the **entire thread** as context for your prompt. Useful when:

- You're referring to multiple clauses
- You want Lizzy to consider the full document structure
- You're not selecting a specific paragraph

Note: You can't use **Search** mode while full document context is active.

◆ **Think & Search Modes**

Think and Search are optional modes you can activate before sending a prompt:

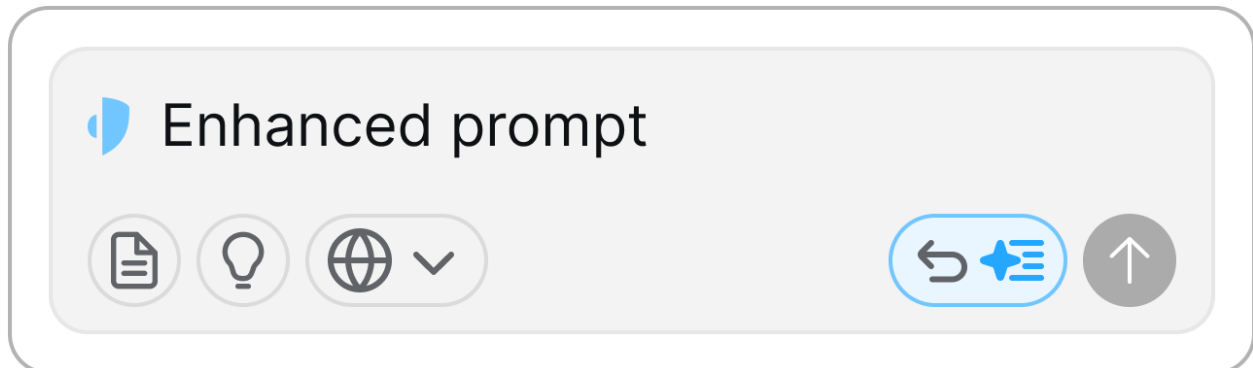
- **Think** – Uses more time for a more precise answer
- **Search** – Uses online sources to add context to your request.

Activate either mode by clicking its icon below the input bar. Only one mode can be active at a time.

◆ Prompt Optimizer

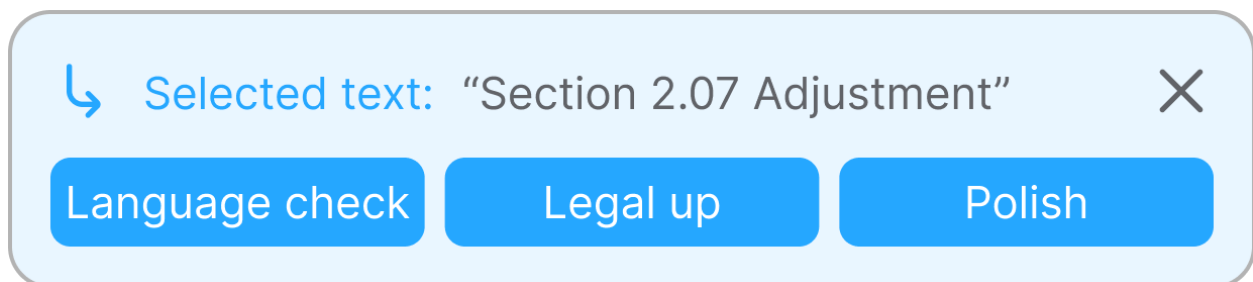
Click **Prompt Optimizer** to rewrite your prompt before sending.

It improves clarity, tone, and structure — especially useful for long or messy inputs.



◆ Using the Selected Text Frame

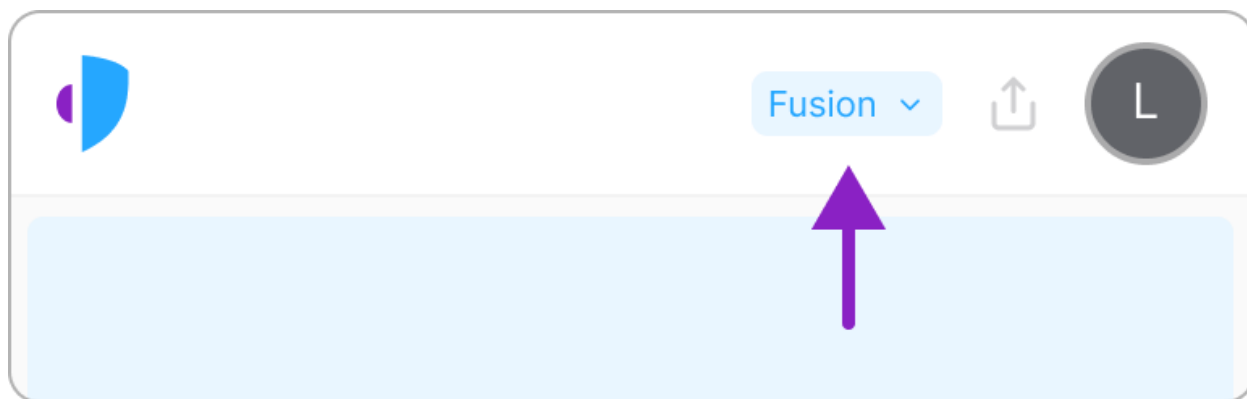
When you **highlight any text of the email that you're writing**, a blue frame appears offering quick preset actions — including **Language Check**, **Legal up**, and **Polish**.



Switching Models

Change the model to fit your legal task.

Lizzy supports multiple AI models. You can switch anytime from the top-right dropdown.



Why Switch Models?

Different models perform better at different tasks.

You might switch models to:

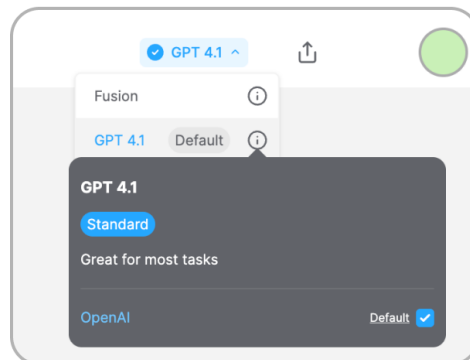
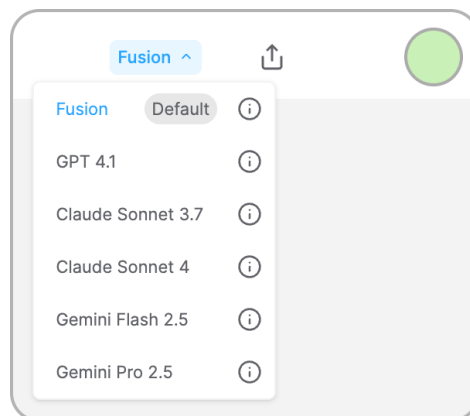
- Get more accurate legal reasoning
- Handle long or complex documents

Setting the Default Model

The default model is automatically used for chat, proofreading, and presets.

To set a default model:

- Click the model dropdown (top right)
- Hover over a model
- Click "Default" in the bottom right of the popup
- ☒ A checkmark will confirm your choice.



Home Tab

The **Home** tab provides one-click tools tailored to the current email context. It's your starting point for analyzing, responding to, or continuing work with incoming messages.

◆ **Content depends on the email mode:**

Lizzy automatically adapts the Home tab based on what you're doing:

- If you're **reading** a message → you'll see tools for understanding and responding
- If you're **writing** → tools focus on editing and enhancing your text
- If you're **replying** → you get the best of both worlds: analysis + drafting

Read Mode (viewing received messages)

The Home tab displays tools to help you understand and act on the message:

- **TL;DR** – Summarizes the message in plain language
- **Summarize Thread** – Shows the full conversation overview
- **Suggest a Reply** – Generates a response you can edit or send
- **Translate** – Translates the message into your preferred language
- **Extract Action Items** – Highlights tasks, follow-ups, and responsibilities
- **Analyze in Lizzy Web** – Opens the email (and attachments) in the web version for deeper analysis

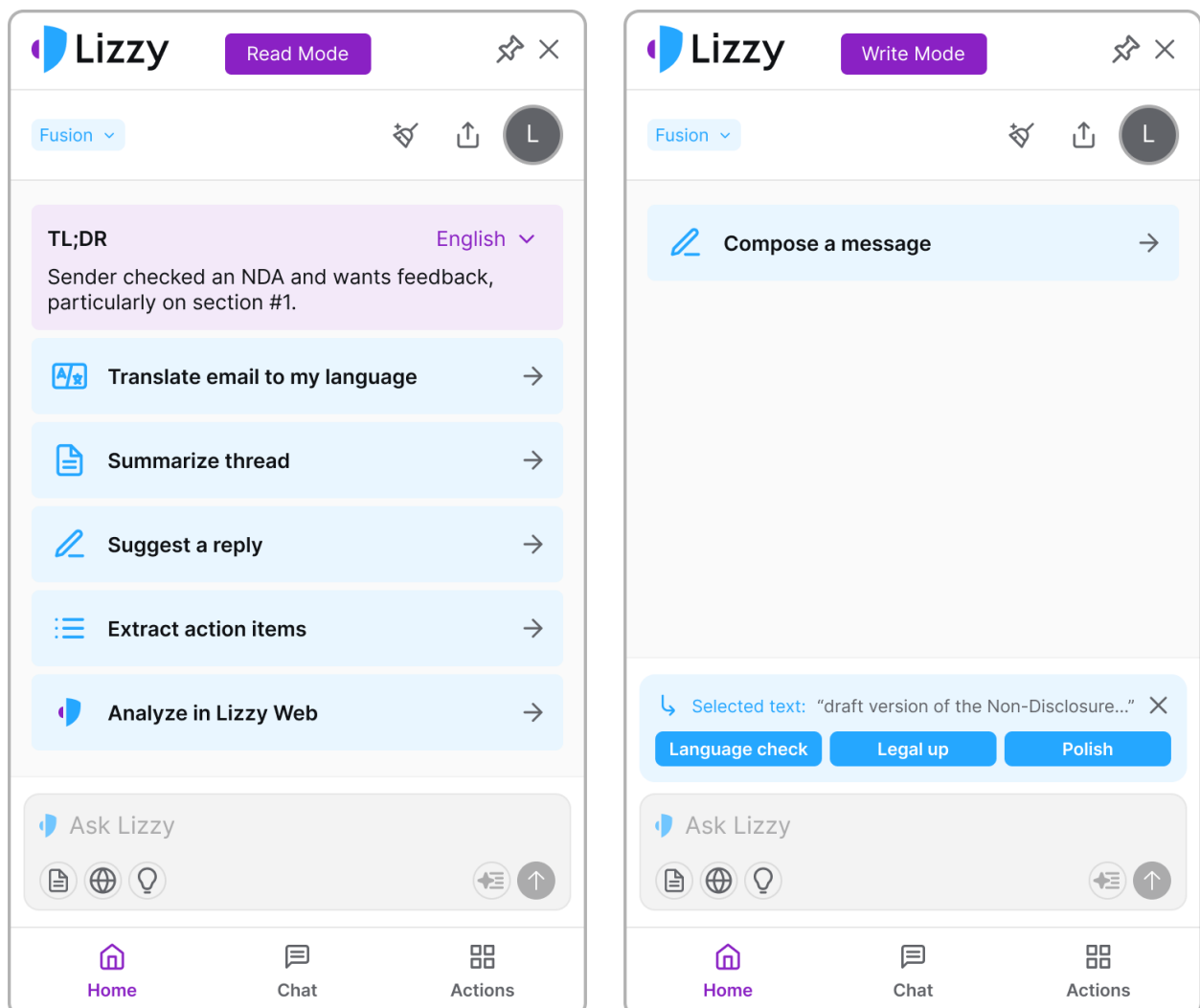
Write Mode (composing a new message)

Fewer tools are shown, focused on helping you **write and refine**:

- Select any part of your draft and run **Quick Actions** such as **Language Check, Polish, or Legal Up**
- Use the **Chat** tab to draft with Lizzy
- Insert replies or rewrite suggestions directly

Reply Mode

When replying to an existing email, you get **both** Read and Write tools in one flow.



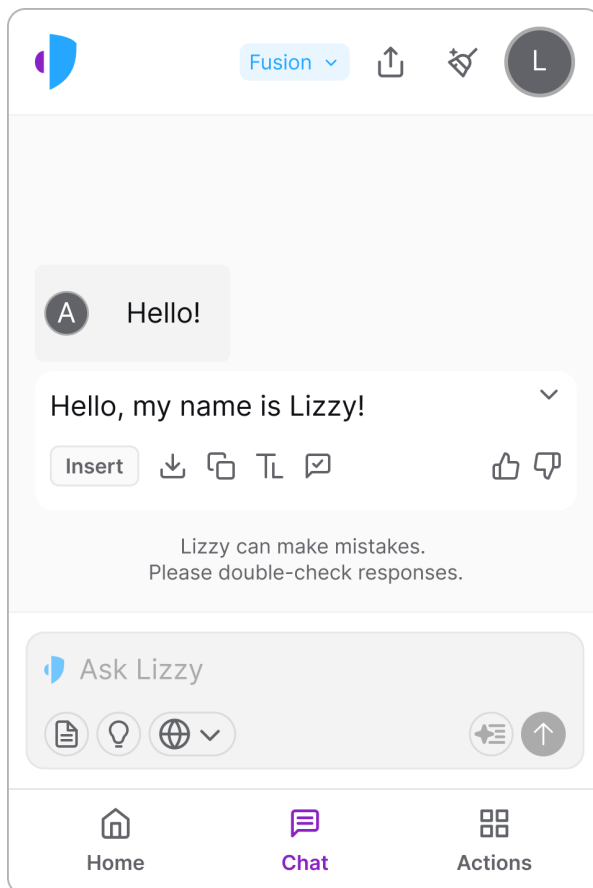
Chat Tab

The **Chat** tab is your space to ask, explore, and generate — with optional context from the email you're working on. It displays the full history of your interactions with Lizzy, including responses to prompts submitted via:

- The **Input Bar** from any tab
- The **Home tab** tools (e.g. TL;DR, Suggest a Reply)
- **Quick Actions** applied to selected text
- **Presets** you've triggered

You'll find **Clear Chat** and **Share Chat** in the **top bar** of the Chat tab:

- Click **Clear Chat** to reset the conversation
- Click **Share Chat** to copy a link to the chat

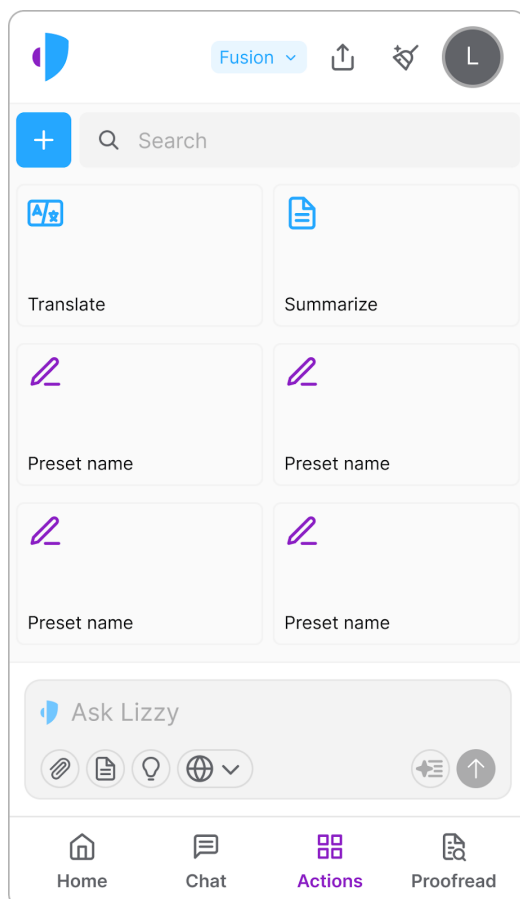


Quick Actions Tab

The **Quick Actions** tab gives you fast access to **presets** — pre-written prompts you can run with one click. Unlike the Web version, Outlook focuses primarily on **your personal presets**. A limited number of built-in presets (like *Translate*) are available, but most of the power comes from custom prompts you create and reuse.

♦ What you can do

- **Run a saved preset** – Apply your own preset to selected text in an email
- **Edit presets** – Change or update your saved prompt templates
- **Use built-in actions** – Some system presets like *Translate* may be available
- **Apply presets with context** – Choose what input the preset should run on



◆ Saving a preset

- Click the **+** button in the Actions Panel and enter your prompt
- Or click the **dropdown** on any sent message → **Save as preset**

◆ Choosing Context for a Preset

When using a preset, you can choose the context it applies to:

- **Email body** – Use the full message you’re working on
- **Last Lizzy response** — The latest AI reply in the conversation
- **Selected text** — A part of the document *or message* you’ve selected
- **Entered text** — A custom input you type manually

Summary

×

Select context for the prompt preset

 Email body
EML

 Last Lizzy response
"ABC Company is of..."

 Selected text
"ABC Company is of..."

 Entered text
"ABC Company is of..."

Simple summary

One sentence

Outline

Table

Bullets

Comprehensive

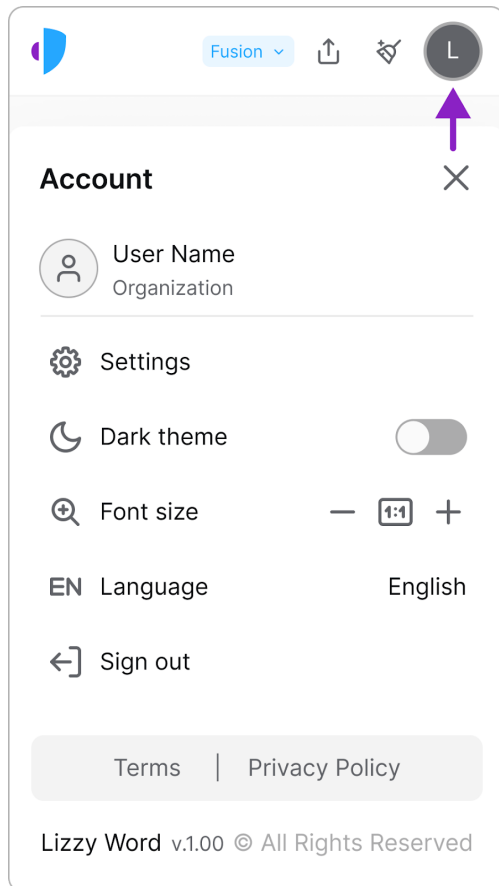
TL;DR

Abstract

Select the context source at the top of the preset screen **before choosing** how you want the output (e.g. summary, outline, bullets).

⚙️ Add-in Settings

To open Add-in Settings, click on your profile icon in the top-right corner.



◆ Interface Settings

- **Dark theme** — switch between light and dark mode.
- **Font size** — increase or decrease UI font size.
- **Language** — choose interface language.

◆ Add-in Behavior Settings

- **Track changes when inserting** — whether suggestions are added with tracked changes.

- **Track changes by word** — when enabled, suggested edits appear grouped by **whole words** in Compare View (not individual characters).
- **Load last chat** — automatically restore the previous chat session when opening the add-in.

