Files and Photos in Hedy: What to Add for Sales Calls, Interviews and More

Where to add documents and photos in Hedy, what to add for sales calls, interviews, client meetings and classes, and how to ask Hedy about them.

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A man at a meeting table reads a printed brief with highlighted lines next to his open MacBook, his iPhone face down beside a coffee cup

Quick answer To use a file as context in Hedy, add it to a session context if you'll need it in many meetings, or to a single session's Notes tab if it belongs to one meeting. Hedy reads the file on your device and uses the relevant parts when it answers in chat, writes your recap and suggests what to say. Part of Hedy Pro and Hedy Team .

Hedy hears the conversation, but a lot of what you need in a meeting lives somewhere else: the price list you quote from, the job description you're interviewing against, the agenda someone printed. You can now give Hedy those documents and photos. It reads them and brings in the parts that matter while you talk and afterwards. This guide covers where to put each kind of file, what to add for common meetings, and how to get good answers from them. For the privacy side and the model behind it, see Files and Photos as Context, Powered by EmbeddingGemma 2 (/post/files-and-photos-as-context-embeddinggemma-2/) .

Context or session: where a file belongs

Hedy has two places for files, and picking the right one is most of the setup.

A session context is the background you reuse. It already holds what you've told Hedy about yourself and your work, and any files you attach to it go into every session that uses that context. That's the place for material that changes rarely: your price list, your CV, a product sheet, a style guide.

A session is one meeting. Files and photos you add there only inform that meeting: a client's brief, the agenda, a contract draft you're reviewing together, a photo of the whiteboard. You can add them while the session is running or after it ends. To have a file ready before a meeting starts, put it on the context you'll use.

If you'd want the file in next month's meetings too, put it on a context.

Add files to a context

1. Open Settings , go to Personalization and find Session AI Context & Instructions .
2. Open the context you want, or create one (see Managing custom contexts (/help/managing-custom-contexts/)).
3. Under Files , click Attach files and pick one or more files. On a computer you can also drag files onto the context.

Each file shows Indexing… while Hedy reads it and Ready when it's done. If only part of a file could be read, the row says so.

Add files and photos to a session

In the Hedy app on Mac or Windows:

1. Open the session and go to the Notes tab.
2. Click Files & photos to expand the card, then click Add files or photos .
3. Pick documents or images from the file picker.

On Mac and Windows you can also drop files onto the open session, or copy files in Finder or File Explorer and paste them into the Notes editor with Cmd+V or Ctrl+V .

On a phone, tap Add files or photos in the same card and choose Take photo , Choose from library (up to ten photos at once) or Choose files . During a meeting you can also tap the camera in the empty chat box. Photos you take there land in the same card, and Hedy shows Added to Notes with a View button.

The recap lists the files and photos that are ready under Files & photos from this session , with Manage in Notes to add or remove them. The web app shows your files and photos but can't add or remove them.

Ask Hedy about your files

Once a file says Ready, ask about it in chat the way you'd ask a colleague who has read it:

- "What's our price for the annual plan?"
- "Which of my projects fits what they just asked about?"
- "Does the contract say anything about late delivery?"
- "What did the whiteboard say about next steps?"

Hedy looks for the passages that match and answers from them, and it's asked to name the file it relied on. Relevant passages also help the recap and detailed notes get names, numbers and product details right. During a live session, automatic suggestions (/help/automatic-suggestions/) can quote a fact from your files instead of giving a general tip.

What to add for common meetings

Sales calls

Put your price list, product sheet and the answers to the objections you hear most on your sales context. Add the prospect's RFP or requirements document to the session. When the buyer asks about volume discounts or a feature, ask Hedy to look it up in your files. The sales calls guide (/help/how-to-use-hedy-for-sales-calls/) covers the rest of the setup.

Job interviews

Attach your CV to your context, so Hedy can draw on your real projects and dates. Add the job description and any notes on the company to the session. When the interviewer asks for an example, ask Hedy which project in your CV fits the question. More in the job interviews guide (/help/how-to-use-hedy-for-job-interviews/) .

Recruiting

Add the candidate's CV and the job's scorecard to the session. You can ask Hedy how an answer compares with what the CV says, or which scorecard areas might need a follow-up question. See the recruiting guide (/help/how-to-use-hedy-for-recruiting/) .

Client meetings and consulting

Add the proposal, statement of work or last quarter's report to the session. When the client asks what was agreed, ask Hedy what the document says.

Negotiations

Add the term sheet or the other side's offer to the session, and your own pricing to your context. When a new number comes up, ask Hedy how it compares with the written terms. The negotiations guide (/help/how-to-use-hedy-for-negotiations/) has more.

Classes and lectures

Add the lecture slides or the reading to the session. When the professor fills the board, take a photo of it. Your notes and chat answers can then use the slides and the board alongside what was said. See the classes and courses guide (/help/how-to-use-hedy-for-classes-and-courses/) .

Team meetings and workshops

Take a photo of the whiteboard before someone wipes it, and add the agenda. The recap can then pick up owners and dates that were written down but never said out loud.

Tips for better answers

• Give files clear names. Hedy names the file it relied on, so "Acme renewal proposal" beats "final_v3".

• Keep it focused. The pages that matter for the meeting work better than a 300-page handbook.

• Check photos for text. If a photo row says "No text found in this photo", retake it closer and straighter, with less glare.

• Export what Hedy can't read. Save old .doc, .xls and .ppt files as .docx, .xlsx or PDF, export Pages, Numbers or Keynote files without a preview as PDF, and remove passwords first.

• Wait for Ready. Hedy can use part of a document while it's still indexing, but Ready means all the text it could read is available.

Smarter file context (optional)

Out of the box, Hedy uses short files in full and, in longer ones, finds the passages that share words with the conversation. Smarter file context helps Hedy find the right passage even when people use different words. A client might ask "what if we go over our seats?" while the answer sits under "Overage pricing" in your contract.

It's an optional 310 MB download, once per device, and it runs Google's EmbeddingGemma 2 on your device. When you have files and haven't downloaded it, a Smarter file context card with a Download (310 MB) button appears with your files, in the session's Files & photos card or the context's Files section. You'll also find it in Settings !’ Speech & AI !’ Smarter file context . On a phone, large downloads wait for Wi-Fi, and Download now (310 MB) uses mobile data instead.

During a live session, live suggestions use your files in full when together they fit in about a page. Longer files need Smarter file context and a device fast enough to search them while the session runs. Apple Silicon Macs, iPhone 15 Pro or newer and iPads with an M-series or A17 Pro chip qualify right away. Other devices run a short speed check after the download, and Hedy shows the result under Smarter file context. To get key facts into live suggestions on any device, put a short summary of them in the context's own text. Chat and recaps work with longer files on every device.

Your files stay on your device

The original file stays on the device you added it from, and Hedy reads it there. With Cloud Sync on, the text Hedy read, the file name and type, and the search data sync to your other devices, which show the text but can't open the original. With cloud AI analysis, Hedy sends selected text and the file names to our AI providers with your transcript, and short files may be sent in full. Turn on Local AI (/help/local-ai-processing/) and turn off Cloud Sync, and your files and the text Hedy reads from them stay on your phone or computer. The help article (/help/use-files-and-photos-as-context/) has the full details.

FAQ

Should I add a file to a context or to a session?

Add it to a context when you'll want it in many meetings, like a price list, your CV or a product sheet. Every session that uses that context can draw on it. Add it to a session when it belongs to one meeting, like an agenda, a client's brief or a photo of the whiteboard.

How do I add a file to a session?

Open the session, go to the Notes tab and click Files & photos to expand the card. Then click Add files or photos. On a phone you can take a photo, choose from your library or choose files. On Mac and Windows you can also drop files onto the open session, or paste copied files into Notes with Cmd+V or Ctrl+V.

What kinds of files can Hedy read?

PDF, Word (.docx), PowerPoint (.pptx), Excel (.xlsx), CSV, text and Markdown files, plus JPEG, PNG, HEIC and WebP images. For Pages, Numbers and Keynote files Hedy reads the PDF preview inside the file. Old .doc, .xls and .ppt files and password-protected files don't work.

Can Hedy read handwriting on a whiteboard?

It reads the text in a photo with your device's own text recognition, so clear handwriting is often readable. Check the text Hedy read, since recognition varies by device and language. It doesn't interpret drawings, so a chart with few labels gives Hedy little to work with.

Do I need Smarter file context?

No. Without it, Hedy uses short files in full and finds passages in longer ones that share words with the conversation. Smarter file context is an optional 310 MB download per device that helps Hedy find passages when people use different words.

Do my files leave my device?

The original file stays on the device you added it from, and Hedy reads it there. If Cloud Sync is on, the text Hedy reads syncs to your other devices. With cloud AI analysis, Hedy sends selected text and the file names to our AI providers with your transcript, and short files may be sent in full. With Local AI on and Cloud Sync off, your files and their text stay on your device.

Is it included in the Free plan?

No. Files and photos as context are part of Hedy Pro, and Hedy Team members with an active seat can use them too. On the Free plan, the add buttons open the upgrade options.

Related reading

- Use files and photos as context (/help/use-files-and-photos-as-context/)
- Files and Photos as Context, Powered by EmbeddingGemma 2 (/post/files-and-photos-as-context-embeddinggemma-2/)
- Managing custom contexts (/help/managing-custom-contexts/)
- Session Notes (/help/session-notes/)
