**Dependencies**

* Secure integration with internal pitchbook repository/search API
* Permissions service to ensure banker can only access authorized materials
* File preview and download capability within Outlook add-in
* Upload feature for adding new decks to the repository

**Acceptance Criteria**

1. **Trigger Behavior** – When a banker clicks “Add a Document,” the system should open the integrated pitchbook modal.
2. **Search & Filter** – Ability to filter by sub-vertical, client name, date range, and sort order.
3. **View & Select** – Banker can preview “recently viewed” and “frequently opened” decks.
4. **Upload & Add** – Banker can upload a new deck or select from repository, then attach it to meeting context.
5. **Performance** – Search results return within 3 seconds; file attachments initiate within 2 seconds.

**Business Requirements**

* Must be accessible from the Client Insights and Client Briefs pages in Outlook add-in.
* Display relevant decks prioritized by recent usage and meeting context.
* Support bulk selection of multiple pitchbooks.
* Upload flow supports drag-and-drop and standard file picker.

**Definition of Done**

* Banker can attach one or more pitchbooks from repository or upload new ones without leaving Outlook.
* Selected decks are linked to the meeting record and retrievable from the meeting view.
* Meets latency and security requirements.