# **Technical Specification & Product Overview**

## **Product Overview**

AI StandardPlatform is an intelligent automation solution designed to support proposal and operations teams in streamlining their response processes for RFPs, RFIs, and RFQs. Powered by Claude AI, the platform eliminates manual bottlenecks and improves the quality, consistency, and speed of deliverables.

## **Key Features**

* **Data Privacy & Security:** Claude AI does not store or remember any personal or confidential information during or after sessions.
* **Smart File Access:** Once a folder path is set, any RFP, RFI, or RFQ saved within it becomes automatically available—eliminating repetitive uploads.
* **Formatting (Phase 2):** Tailor resumes and documents based on RFP requirements using built-in formatting tools.
* **Enhanced Responses:** Generates accurate and consistent responses using embedded templates and preloaded knowledge.
* **Time Efficiency**
  + Summarizes documents for **Go/No-Go** decisions
  + Auto-fills forms using known organization data
  + Prompts for only missing or confidential information
  + Automatically formats final submission files

## **Architecture Overview**

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| --- | --- |
| **Component** | **Details** |
| **Frontend** | **Phase 1**: Claude Desktop Interface  **Phase 2**: Custom web-based UI/dashboard will be developed. Model integration (GPT or Claude) will be chosen based on performance, flexibility, and response quality. |
| **Backend** | Python-based backend service (Claude API integration in progress) |
| **Deployment** | Hosted via [Render](https://render.com/) |
| **Document Store** | Phase 1: Local file system  Phase 2: OneDrive, SharePoint, etc. |
| **Security** | Controlled access via filesystem permissions; Claude stores no history |

## **Manual Workflow (Current Process)**

* Read through large RFP documents manually
* Team discussions to determine Go/No-Go
* Upload and analyze documents one by one using ChatGPT
* Write and format responses manually
* Customize resumes and statements per requirement
* Complete all submission forms manually

## **Benefits of our AI StandardPlatform**

* **Significant Time Savings:** Automates document reading, classification, and form filling.
* **Less Manual Interaction:** Requires fewer manual steps and inputs, thanks to built-in automation and natural language prompts.
* **Higher Quality Outputs:** Uses templates and smart prompts for consistent, accurate responses.
* **Enhanced Security:** Files stay within your secured local or cloud environment.
* **Scalable:** Supports new formats, templates, and use cases with ease.

## **Why Not Use Free Versions (Claude/ChatGPT)?**

* No secure file integration or folder access
* Cannot embed tools or custom prompt workflows

### **Phase 1: Features Completed**

* **Custom RAG Database** using internal Broadaxis company data
* **AI Document Summarization** (auto-reads uploaded documents)
* **Go/No-Go Recommendation Engine** (based on relevance, fit, and internal knowledge)
* **Smart Form Filling & Document Generation** using AI and user prompts
* **File Downloads**: Generated documents can be saved locally
* **Deployment**: Phase 1 app deployed to **Render** and available for **customer testing**

## **Next Steps**

* Integrate resume formatting tool
* Design intuitive web UI/dashboard

## **Technical Requirements**

|  |  |
| --- | --- |
| **Component** | **Version/Details** |
| **Claude Desktop (Pro)** | $17/month |
| **Python** | 3.12.3 or higher |
| **OS** | Windows 10/11 or MacOS |
| **Render Hosting** | $25/month |
| **Pinecone Vector DB** | For RAG (Retrieval-Augmented Gen) |

## **Cost Summary**

|  |  |
| --- | --- |
| **Component** | **Estimated Monthly Cost** |
| **Claude AI (Pro)** | $17 |
| **Render Hosting** | $25 |
| **Pinecone (Optional)** | Based on usage plan |