**User Support Manual: AIStandardPlatform (RFP Automation Tool)**

### **Overview**

AIStandardPlatform is a Claude AI-powered solution designed to simplify RFP, RFI, and RFQ response processes. It enables secure document processing, automates repetitive tasks, and delivers consistent, accurate outputs.

### **Getting Started (Initial Setup)**

#### **1. Subscription & Login**

* Download and log in to [Claude Desktop](https://claude.ai/download) using your organization credentials.
* Subscribe to the enterprise version of Claude AI. (after downloading the desktop version > upgrade plan )

#### **2. Set Up Connector**

* Navigate to: File > Settings > Connectors > Add Custom Connector
* Provide:
  + **Connector Name**: e.g., RFPConnector
  + **Endpoint URL**: <https://broadaxis-mcp-server.onrender.com/sse>
* Confirm access to all tools and prompt templates:
  + Go to Three Dots Menu > Tools and Settings
  + Ensure the server appears under Connectors and tools are visible.

#### **3. Enable File Access and PDF Filler**

* Create a folder on your desktop (e.g., AI\_RFPs).
* From the Extensions tab in Claude Desktop:
  + Browse extension > Download Filesystem and PDF Filler tools.
* Grant Claude access:
  + Input folder path (e.g., C:\Users\YourName\Desktop\AI\_RFPs).

### **Uploading Documents**

* Place all RFP, RFI, RFQ documents into the designated folder.
* Claude will automatically detect and list them.
* **Optional Prompt Template**: "List all documents in the RFP folder"

### **Step-by-Step Workflow**

#### **Step 1: Identifying Documents**

**Prompt Template**: Step1\_Identifying\_documents

* Classifies docs into RFPs, RFIs, RFQs, forms, etc.
* Navigation:
  + Go to Tools > Add from broadaxis-server > Step1\_Identifying Documents
* Can also be run via natural language prompt.

#### **Step 2: Summarize Documents**

**Prompt Template**: Step2\_Summarize\_documents

* Summarizes each document individually.
* Steps:
  + Upload via + icon
  + Navigate to Tools > Add from broadaxis-server > Step2\_Summarize Documents

#### **Step 3: Go / No-Go Recommendation**

**Prompt Template**: Step3\_go\_no\_go\_recommendation

* Recommends decision based on Broadaxis RAG data.
* Outputs:
  + Decision (Go/No-Go)
  + Reasoning and confidence score
  + Suggested next steps

#### **Step 4: Generate Capability Statement or Similar Documents**

**Prompt Template**: Step4\_generate\_capability\_statements

* Creates tailored capability statements using RAG and user input.
* Auto-saves result in your working folder.
* You can revise by responding in chat; the updated version will be saved.

#### **Step 5: Fill in Missing PDF Information**

**Prompt Template**: Step5\_fill\_miss\_Information

* Fills incomplete forms or documents.
* If data is missing, Claude will ask for inputs.
* Final version is auto-saved in the folder.

**Note**: You can also use natural language prompts for all the above steps.

### **Available Tools**

|  |  |
| --- | --- |
| **Tool** | **Description** |
| **Broadaxis\_knowledge\_search** | Semantic search over Broadaxis RAG DB to fetch company-related info |
| **Filesystem** | Accesses the local folder system |
| **Pdffiller** | Reads, lists, and writes PDFs |
| **Web search tool** | Performs live internet searches |
| **Create\_custom\_rag\_tool** | Builds RAG databases from provided PDFs/knowledge base |
| **Set\_filesystem\_path** | Sets the working path for filesystem tool |

You're now ready to begin using AIStandardPlatform to accelerate and streamline your RFP workflows.