Welcome to Novilo!

We're thrilled to have you on board! 🎉

Novilo offers two powerful ways to streamline your RFP creation process. Here's a quick guide to help you get started on the platform today.

We're constantly innovating, so you'll notice new features and enhancements appearing regularly. To begin, Novilo currently offers two main solutions:

1. **Rapid Response -** Ideal for straightforward RFPs that require human input and oversight. Rapid Response helps you:
    - Manage RFPs efficiently with built-in status tracking and approval workflows.
    - Create and reuse Q/A templates for frequently asked questions.

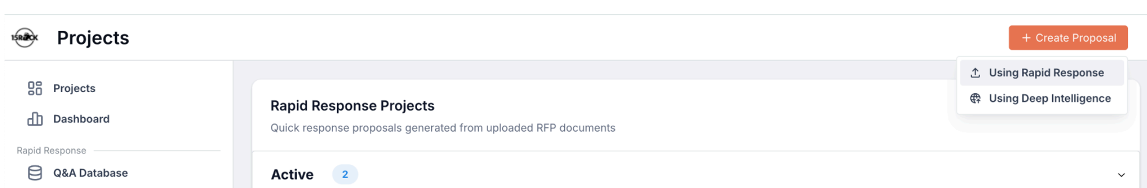
    a. Ingest multiple document types and export in various formats seamlessly.

2. **Deep Intelligence -** Perfect for strategic, insight-driven proposals. Deep Intelligence enables you to:
    - Reference past documents and leverage organizational knowledge.
    - Use customizable templates to jumpstart proposal creation.
    - Build department-specific profiles to ensure consistency and accuracy across teams.

Rapid Response

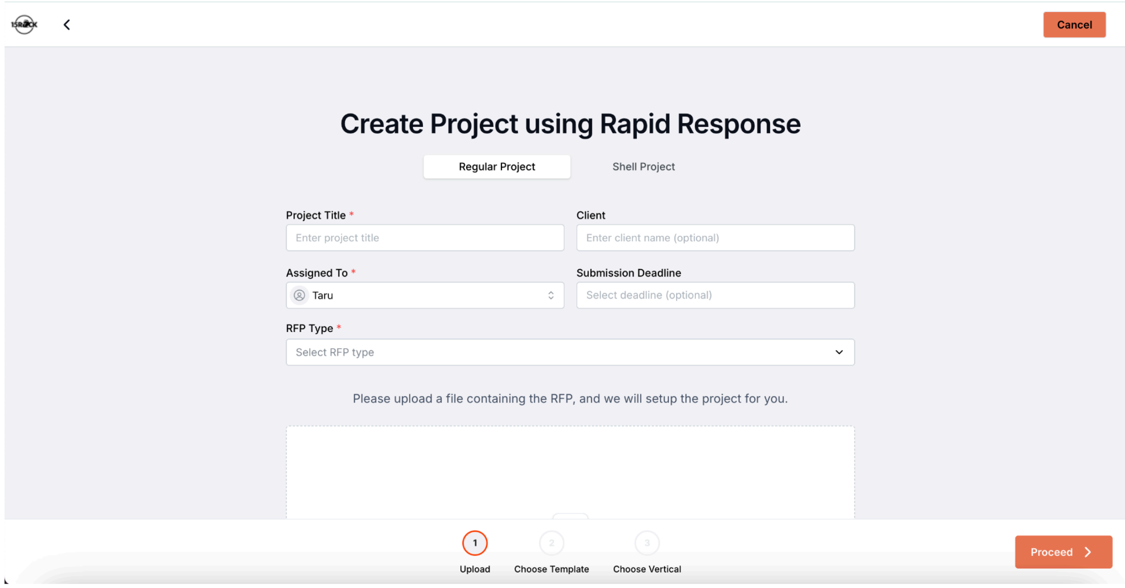
Creating a new RFP

1. **Start a Proposal**
   From the top left corner, select **“Create Proposal”** and choose the **“Rapid Response”** option.



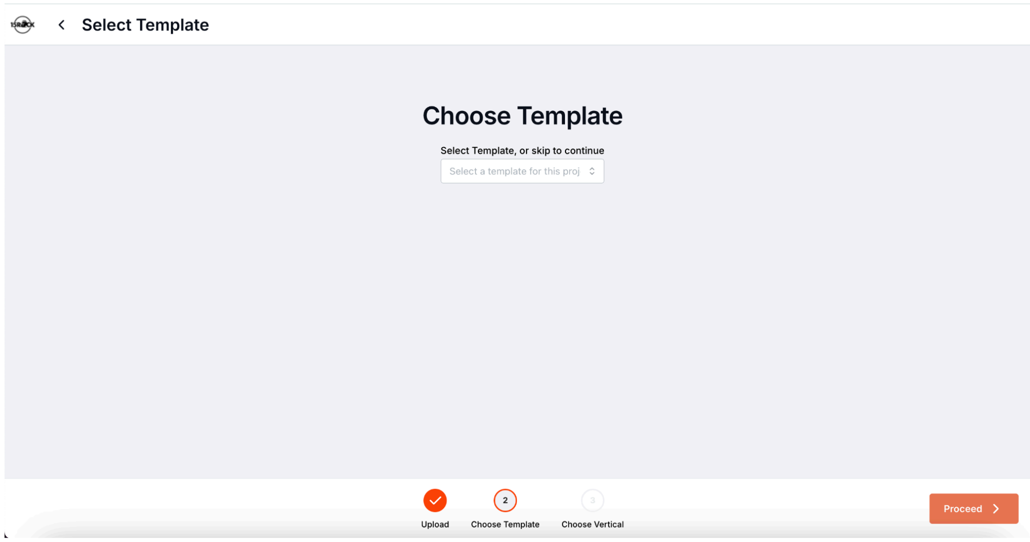
2. **Enter RFP Details**
   Fill out the required RFP details on the next page, then upload your RFP documents and any associated questionnaires. The platform supports multiple file formats,

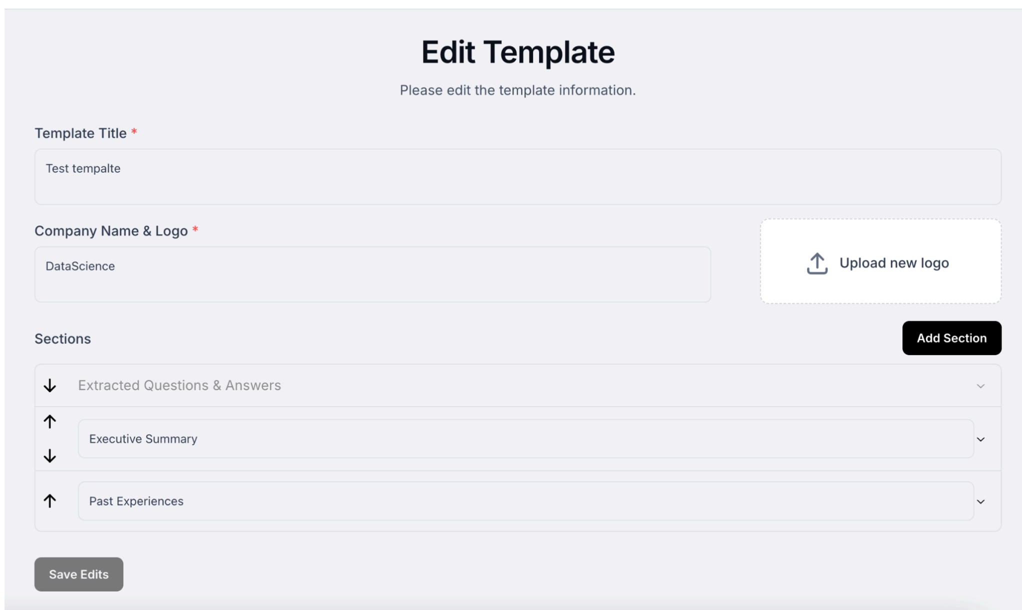
including .md, .txt, .docx, .pdf, .xlsx, .xls, and .doc.



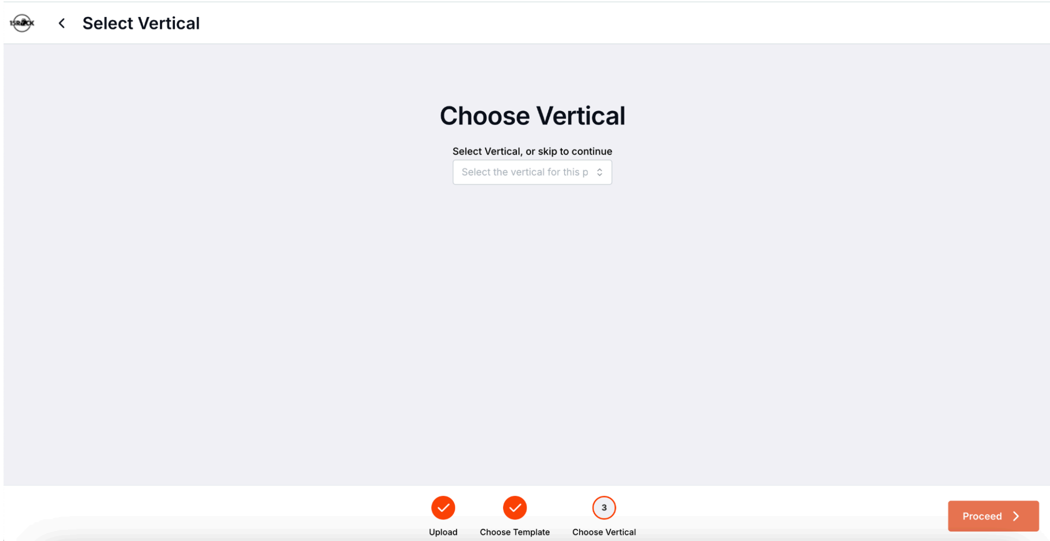
a. **Select or Create an RFP Type**
   Choose an appropriate **RFP Type** — for example, *Insurance*, *Finance*, *Communication*. This helps categorize your RFP and enables the platform to generate accurate tracking metrics on your dashboard.

3. **Choose a Template and Vertical**
   a. **Template:** Select a pre-created template from the platform. When you export documents, your filled responses will automatically populate within the designated sections, allowing for faster editing and consistency.

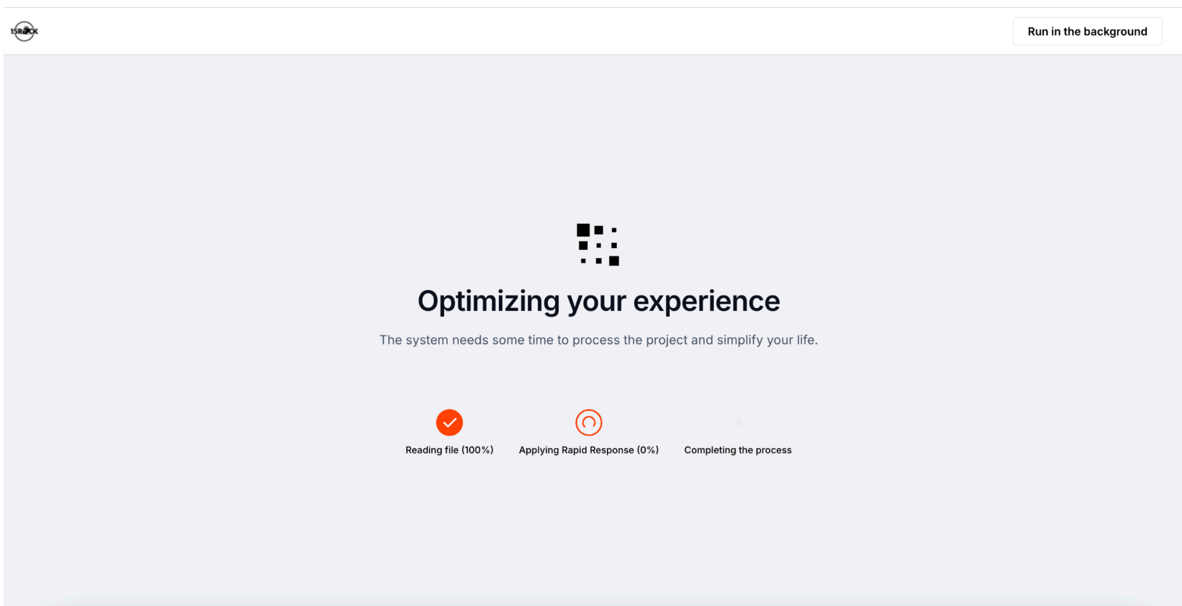




b. **Vertical:** Categorize your RFP and Q&A databases by verticals such as *Professional Services*, *IT Services*, or *Mandate Reviews*. This helps organize projects by department or product line.



4. **Document Processing**
   Once you upload your files, the ingestion process begins. This typically takes **less than 10 minutes**.



5. **Assign Questions**
   After ingestion is complete, you can start assigning questions to the appropriate team members for response.

Organization and Roles

When you first create an account, you'll be placed under your **own organization** by default. To access your company's RFPs, you'll need to be **invited to your company's account** by a manager or administrator.

There are **four user roles** available on the platform, each with specific permissions and access levels.

Roles	Access Levels	Why?
ADMIN	Highest authority - full system access including metrics	The Admin oversees the entire platform, with access to all projects, settings, and performance metrics. This role maintains data integrity, manages user permissions, and ensures organizational alignment across teams.
MANAGER	Project management & team coordination	Managers handle project setup, timelines, and team coordination. They ensure the right specialists and associates are assigned, track progress, and maintain quality and compliance across RFPs.
SPECIALIST	Template creation & project execution	Specialists focus on reviewing, and finalizing RFP responses. They execute project tasks, leverage the content library, and collaborate cross-functionally to ensure proposals are compelling and accurate.
ASSOCIATE	Limited access - view & answer questions	Associates have limited access, allowing them to view assigned sections and answer specific questions. This role ensures broader participation while protecting sensitive data and maintaining structured workflows.

Question Statuses

When a question is assigned to a user, it can move through the following statuses based on actions taken:

- **Pending Action:**
  Default status for all ingested questions until a user begins working on them.
- **In Progress:**
  Once any user starts editing a question, its status changes to *In Progress*.
- **Pending Review:**
  After an associate submits their response, the question moves to *Pending Review* for evaluation.
- **Pending Approval:**
  A reviewer (Specialist primarily but also available to Manager or Admin) can either approve the submitted answer or return it to *Pending Review* for rework.
- **Approved:**
  Final status indicating the answer has been reviewed and approved. Only Specialists, Managers and Admins have approval privileges.

Document Input and Export Types

Novilo supports multiple document formats for each RFP project, including **.md, .txt, .docx, .pdf, .xlsx, .xls, and .doc**.

It also offers **multiple export options** — including PDF, CSV, Excel, Word, and PowerPoint — giving you the flexibility to export your RFP documents in the format required by each project.

Deep Intelligence

Getting Started with AI-Powered Proposals in Novilo

This guide walks you through setting up your Novilo workspace to maximize **Deep Intelligence–powered proposal generation**.
Follow these steps in order to build a reusable knowledge foundation that produces winning proposals in **minutes, not days**.

Overview: The Setup Journey

Step	Section	Purpose
1	Proposal Library	Teach Novilo from your winning history
1a	└─ Manage Tags	Organize content for smart retrieval
2	Documents	Centralize supporting materials
2a	└─ Categories	Structure knowledge for precision
3	Templates	Standardize proposal quality
4	Create Proposal	Generate your first AI-powered proposal

Step 1 – Proposal Library

Navigation

Dashboard → **Proposal Library**

What to Do

Upload your past RFP proposals here. These documents teach Novilo:

- **How you've answered similar questions before**
- **What language and tone you use**
- **What content has helped you win**

Actions

1. Manage Tags before this (Step 1a)
2. Click **Upload Proposal** or drag and drop files
3. Upload completed proposals from your archives

4. Include both wins and strong submissions

Pro Tip
Import proposals manually or via **SharePoint integration** to accelerate setup. The more proposals you upload, the better Novilo learns your style.

Why This Matters

Benefit	Impact
✔ Builds historical intelligence	AI learns your winning patterns
✔ Reduces rewriting	Start from proven content
✔ Captures knowledge	Your best answers become reusable assets

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Step 1a – Manage Tags

Navigation

Dashboard → **Manage Tags**

What to Do

Create tags to categorize proposals and documents by:

Category	Examples
Industry	Healthcare, Government, Financial Services
Service Line	Consulting, Implementation, Managed Services
Buyer Type	Enterprise, Mid-Market, Public Sector
Capability	Cloud Migration, Compliance, Analytics

Tags help Novilo **automatically surface the most relevant content** when generating responses.

Actions

- Open **Manage Tags**
- Create tag categories
- Add specific tags within each category
- Refine over time as patterns emerge

Why This Matters

Benefit	Impact
✔ Improves relevance	Context-aware answers
✔ Prevents generic AI output	Industry- and buyer-specific responses
✔ Enables fast filtering	Find content instantly

Step 2 – Documents

Navigation

Dashboard → **Documents**

What to Do

Upload supporting materials such as:

- Case studies
- Team bios / resumes
- Methodologies & frameworks
- Certifications
- Company overview & boilerplate
- Past performance references

Actions

1. Create Document Categories (Step 2a)
2. Upload files or connect SharePoint
3. Assign each file to a category
4. Add relevant tags
5. Keep documents up to date

💡 **Pro Tip**
Keep each document type in its own category. Organization here directly improves proposal quality.

Why This Matters

Benefit	**Impact**
✔ Centralized knowledge	Single source of truth
✔ No more folder hunting	Find content in seconds
✔ Consistent messaging	Same quality across all proposals

Sharepoint Integration

- To connect to Sharepoint for the first time, admin site access is required.
- Cannot initiate multiple sync operation until the first sync operation os completed
- The other will fail till the first job is completed.
- File Types restrictions: docx, pdf, txt., md.

Step 2a – Create Document Categories

Navigation

Dashboard → Documents → **Create Document Category**

What to Do

Create custom categories and upload files manually or via SharePoint.

Novilo’s **Deep Intelligence** uses two search layers:

Search Type	What It Does
Vector Search	Understands meaning and context
Full-Text Search	Matches exact language and keywords

Together, they ensure **accurate and defensible content reuse**.

💡 **Pro Tip**
Think of categories as filing cabinets. Clear structure = faster, smarter AI results.

Why This Matters

Benefit	Impact
✔ Knowledge discoverability	AI finds the right content
✔ Precise referencing	Accurate citations and reuse
✔ Compliance support	Traceable content sources

Step 3 – Templates

Navigation

Dashboard → **Templates**

What to Do

Create or upload proposal templates that define:

- Section structure
- Section objectives
- Length guidelines
- Tone and voice
- Win themes and intent

Templates ensure proposals stay **on-brand, compliant, and consistent** — regardless of who's writing.

Actions

1. Create or use an existing template
2. Define sections and guidance
3. Save as default for proposal types

💡 **Pro Tip**
Start with templates for your most common RFP types — this accelerates ~80% of your work immediately.

Why This Matters

Benefit	Impact
✔ Standardized quality	Professional output every time
✔ Scalable production	Anyone can generate strong drafts
✔ Faster reviews	Fewer revision cycles

Step 4 – Create Proposal

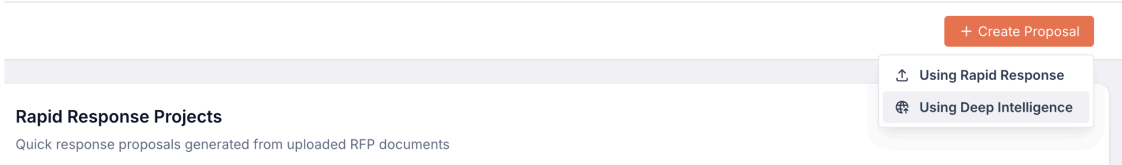
Navigation

Dashboard → **Create Proposal**

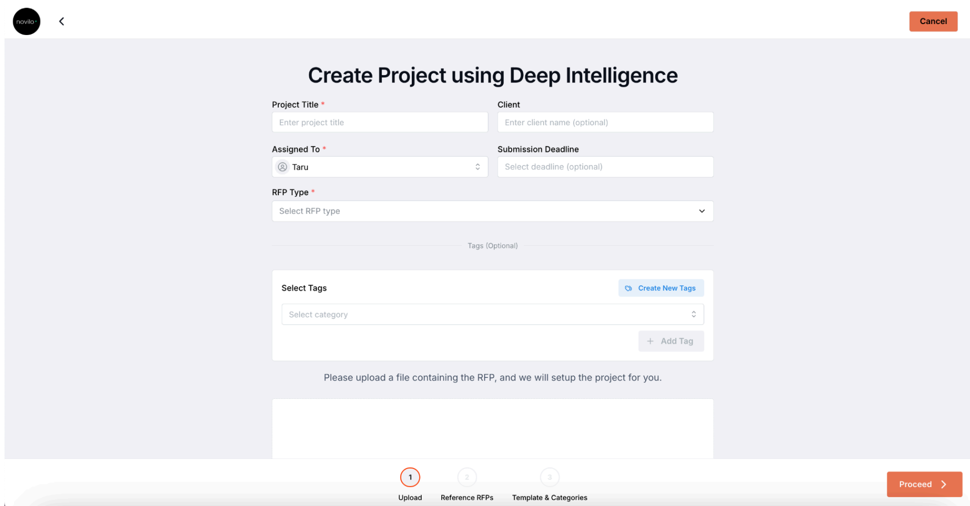
Creating a new RFP

1. **Create a Proposal**
   From the top-right corner of your dashboard, select **Create Proposal** → **Deep**

Intelligence.

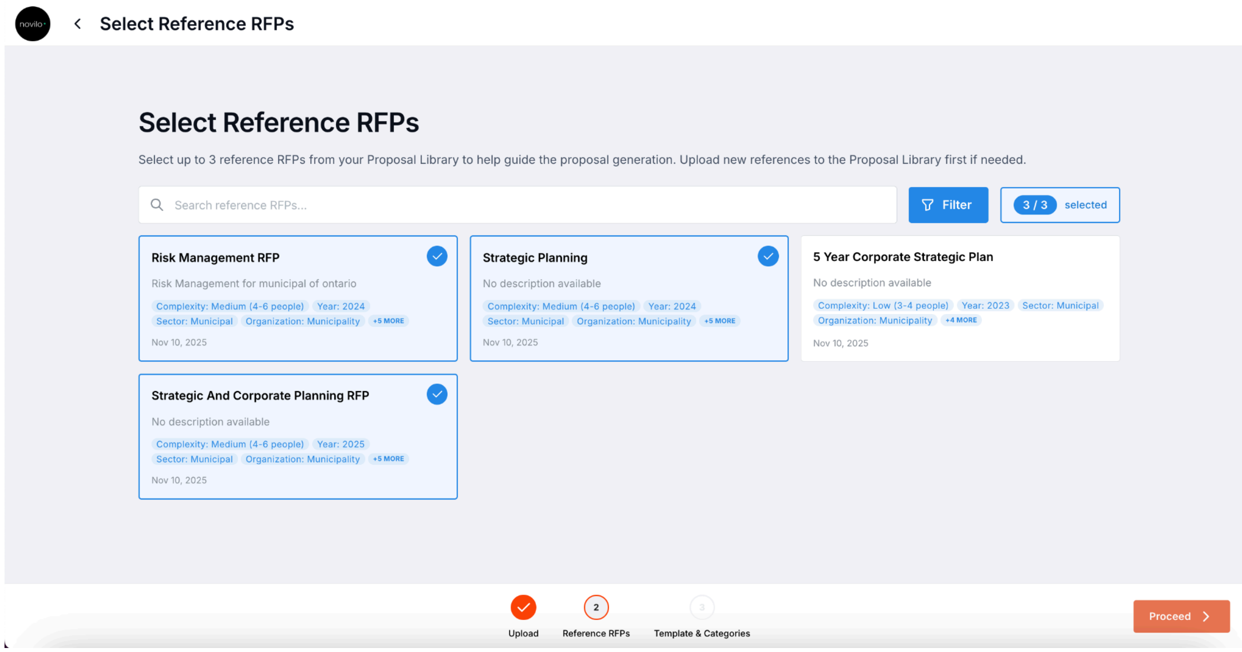


2. **Enter RFP Details**
   On the next page, fill out all required RFP details and upload your RFP documents and assign tags for this RFP. Novilo supports multiple file formats, including **.md, .txt, .docx, .pdf, .xlsx, .xls, and .doc**.



3. Choose Past Proposal
   You can also select up to **3 past RFPs** to reference. These can be uploaded under the

Proposal Library page.



4. **Choose a Template and Supporting Documents**
   Select a template to define the structure of your RFP.
   A **template** serves as a **table of contents**—outlining the key sections, guiding the content direction, and helping you shape each section into its best version.
   You can create and save multiple templates for different RFP types and easily edit them for individual projects.

   Once you have selected a template, select the supporting documents that you need for each section. For example in the screenshot below, for the Introduction section, I use the company overview document to build it out and can use it as reference or verbatim.

Creating a RFP usually takes around 15-20 minutes.