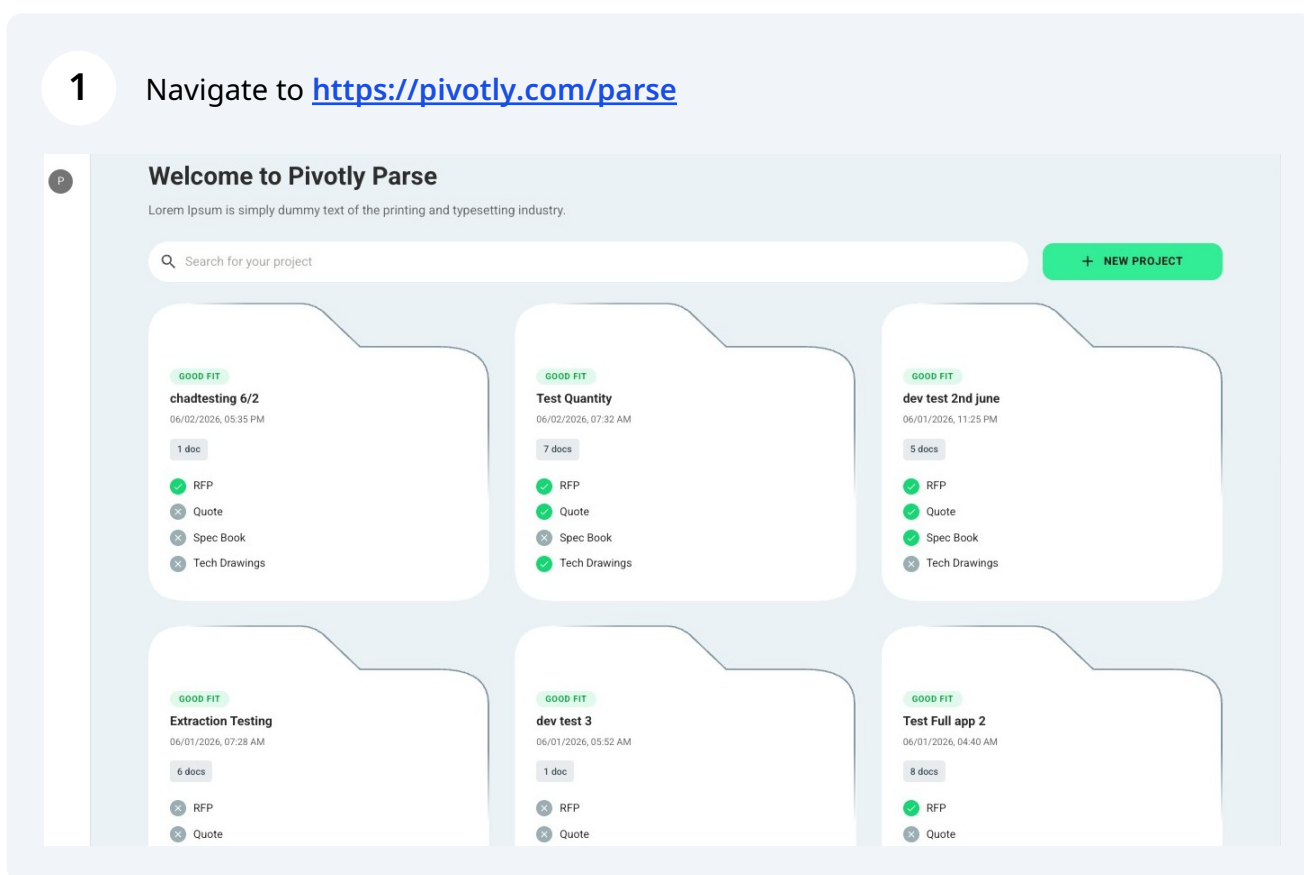


Parse - How to Create a Project and Upload Different Documents

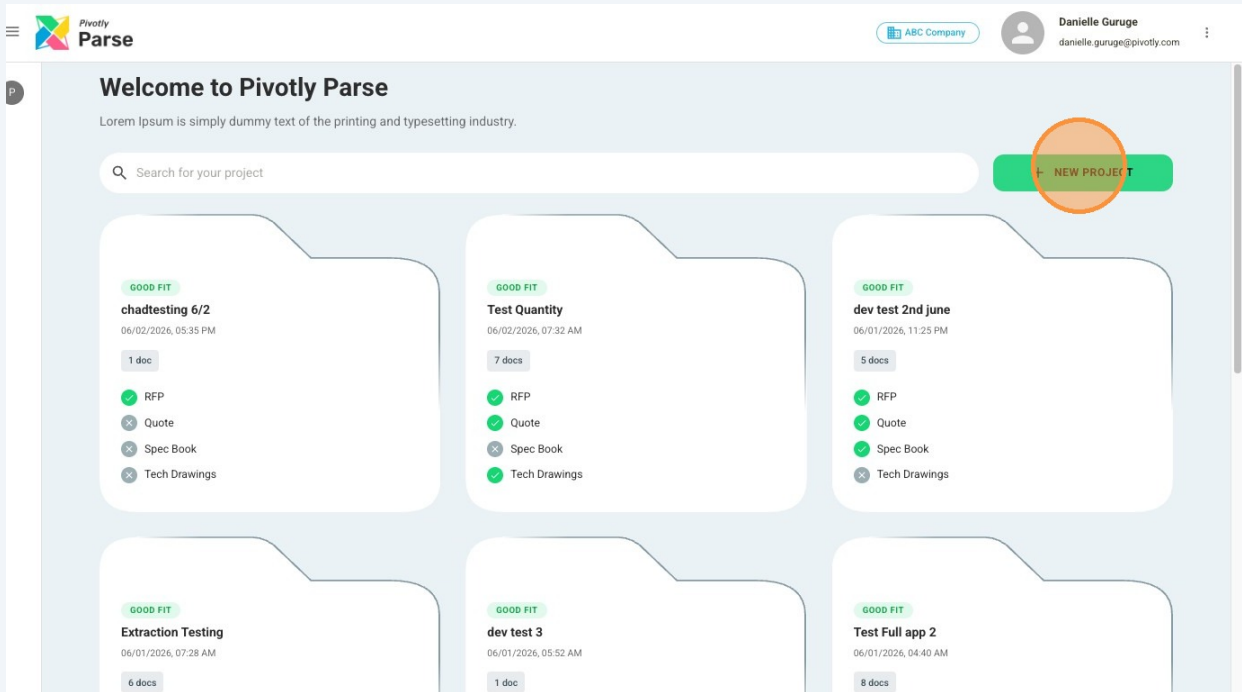
Learn how to efficiently manage your project workflow by setting up new projects and uploading various document types in Pivotly. This guide covers the essential steps for configuring document details, selecting scopes, and submitting your files for automatic analysis.

Project Initialization

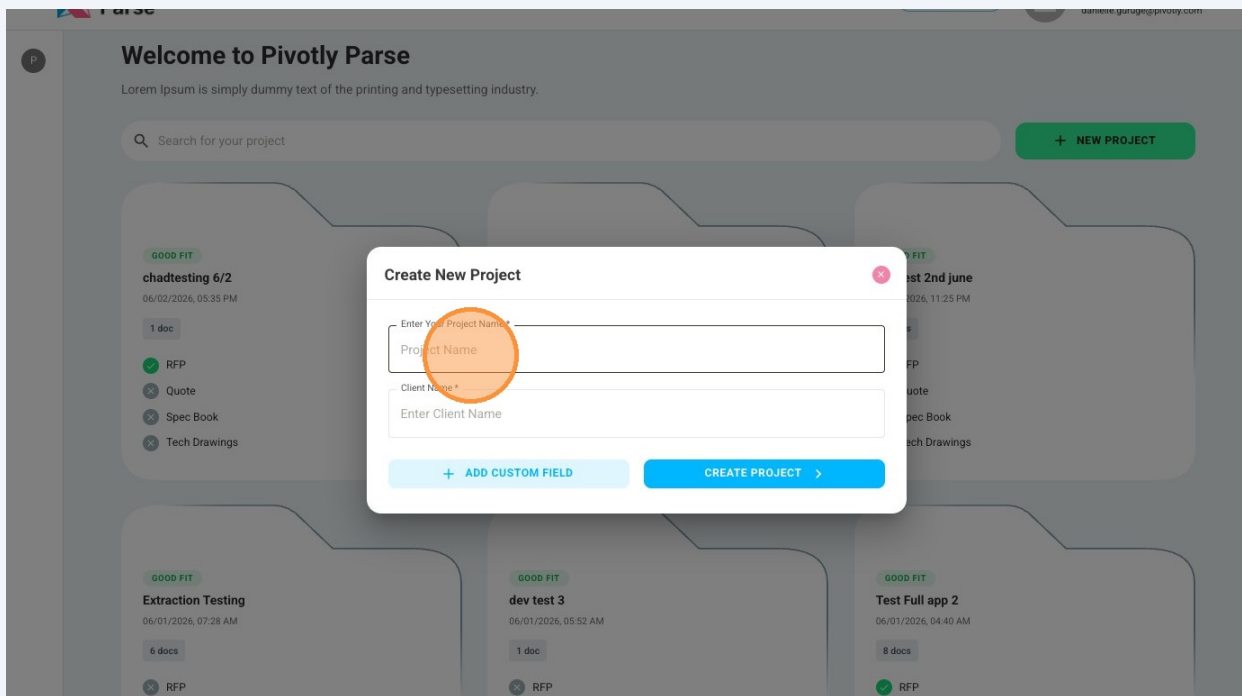
1 Navigate to <https://pivotly.com/parse>



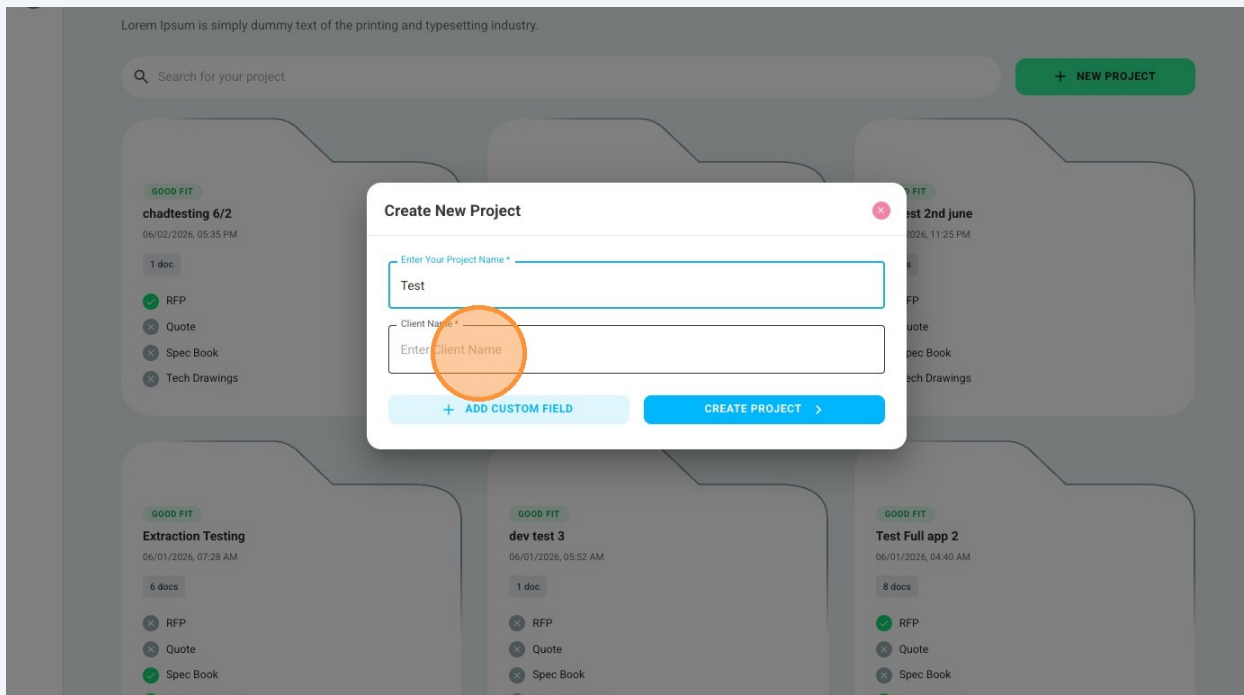
2 Click "New Project"



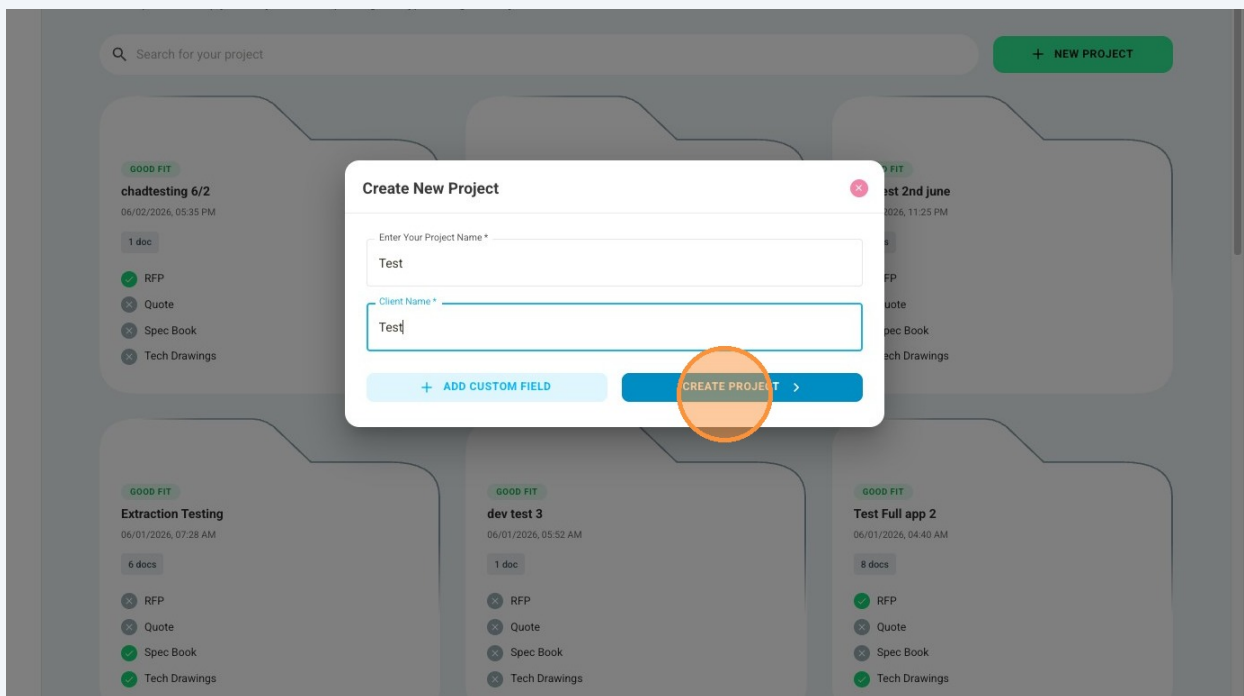
3 Type the name of your project into the Project Name field



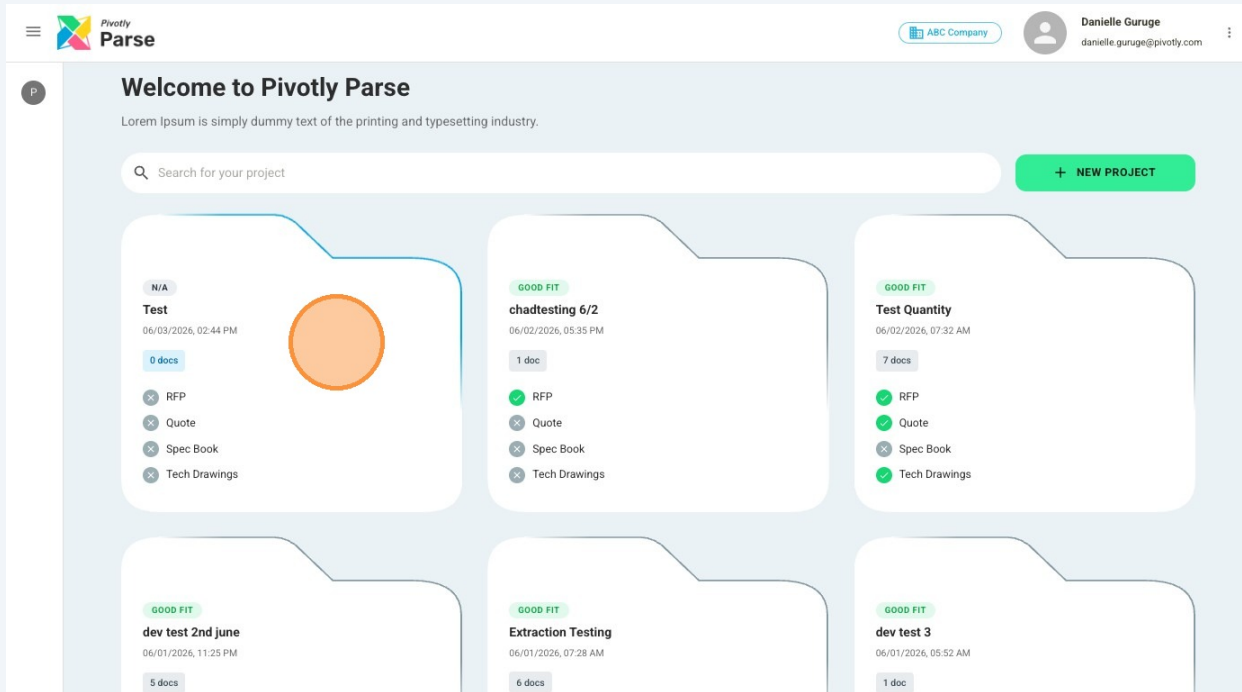
4 Type the name of your client or business into the Client Name field



5 Click "Create Project"

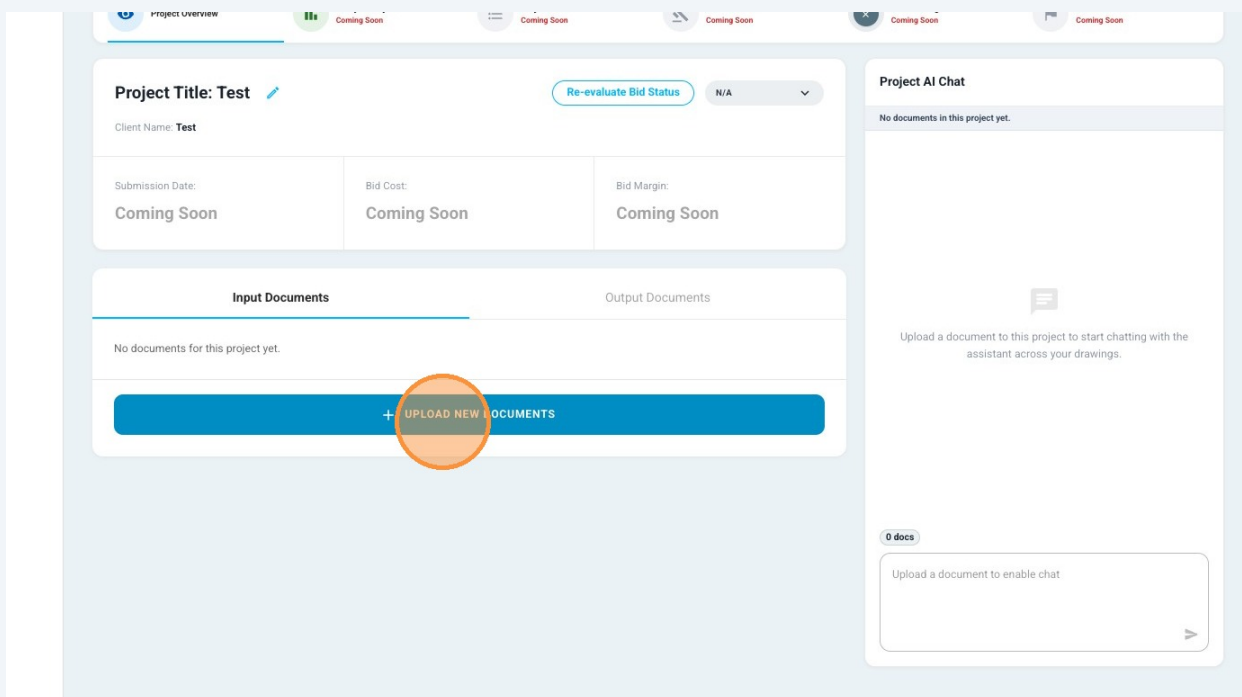


6 Select the newly created project

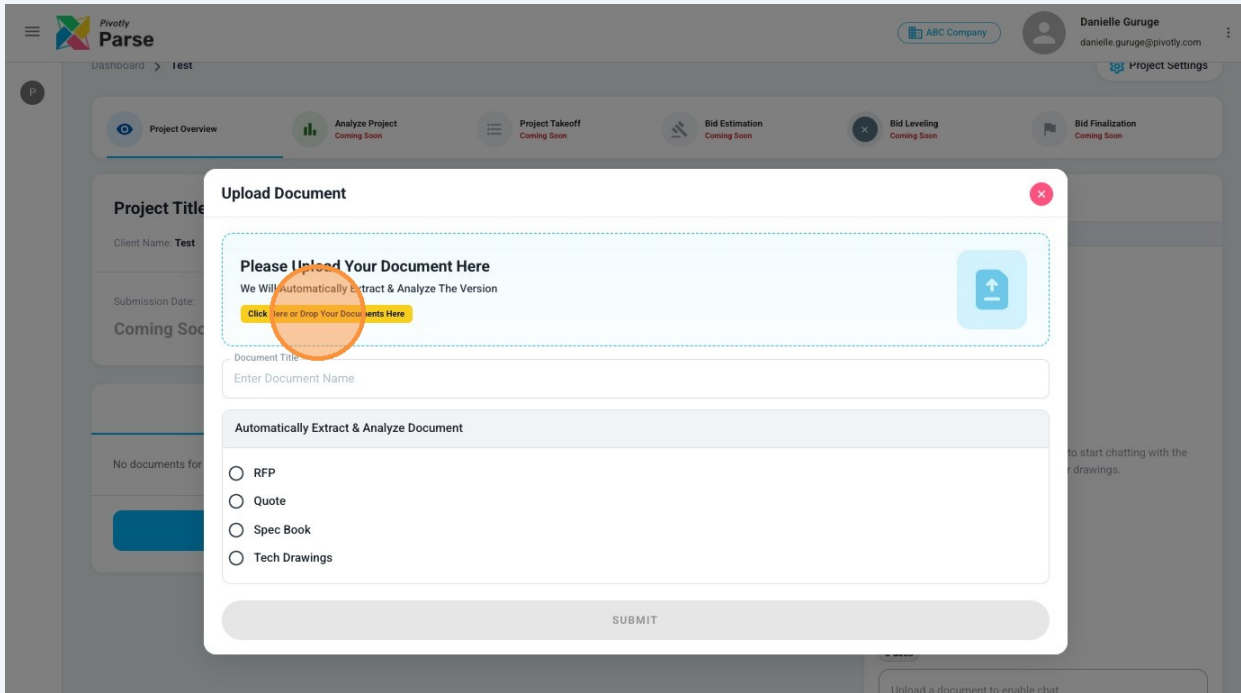


Document Configuration

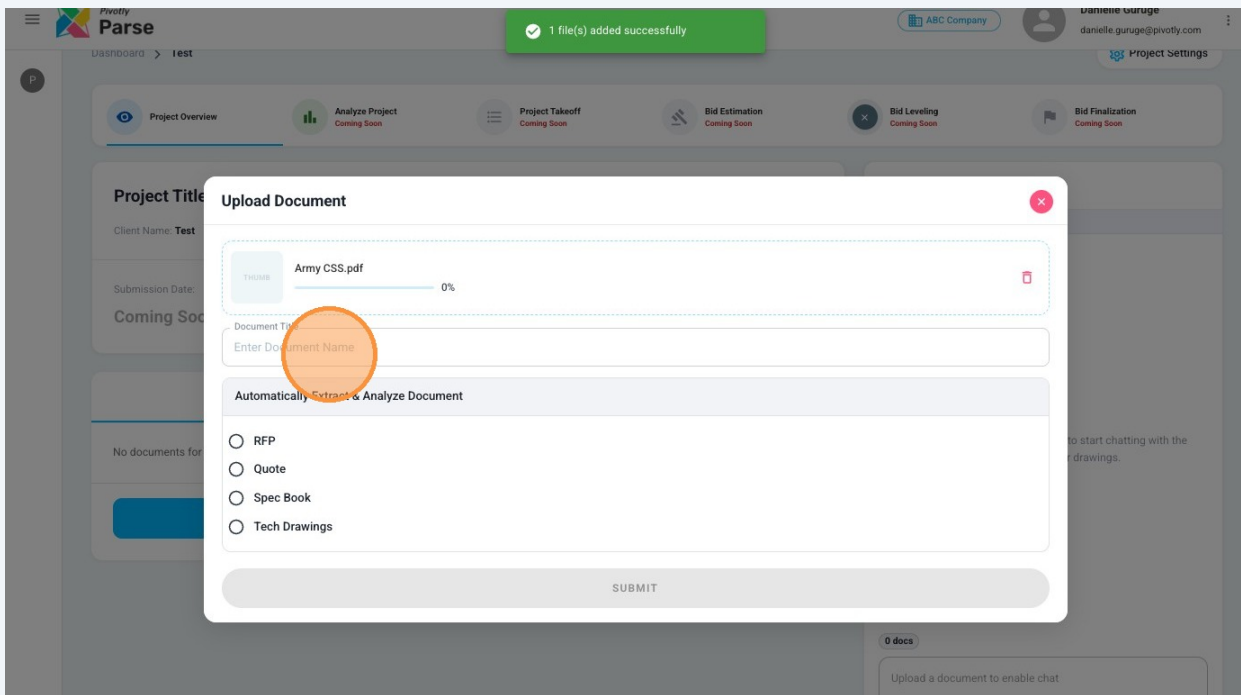
7 Click "Upload New Documents"



8 Click the upload area to select a document

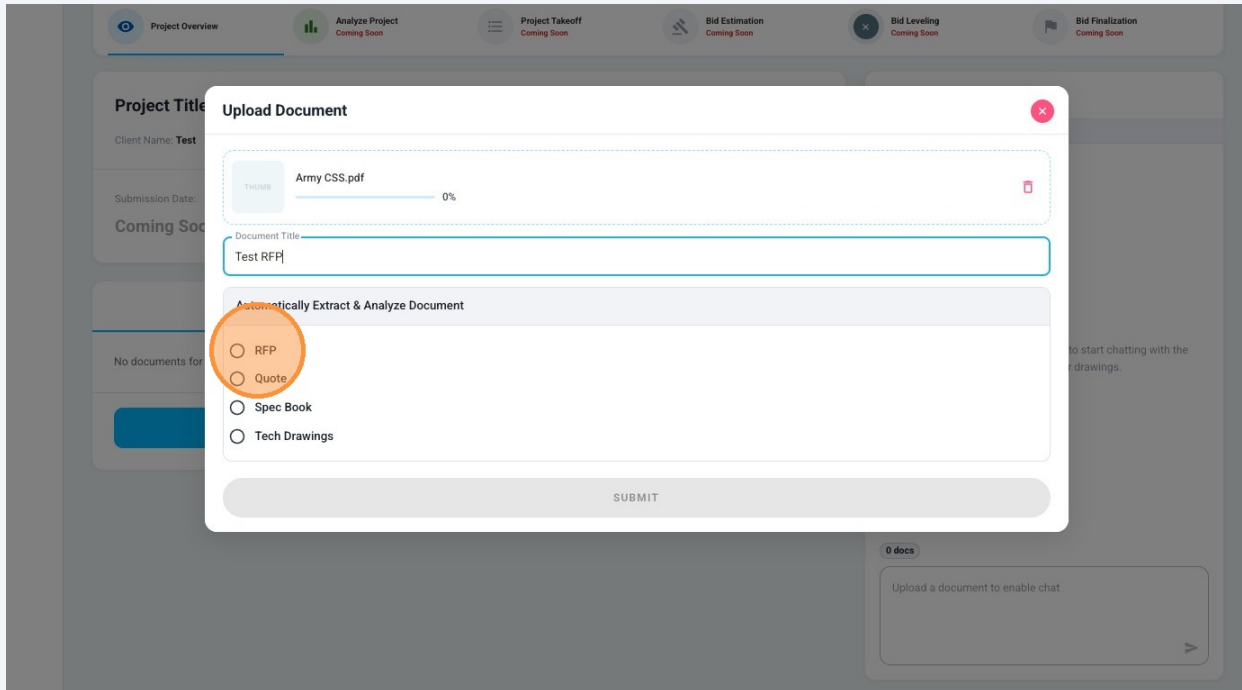


9 Based on the document you are uploading, type in the name of the document



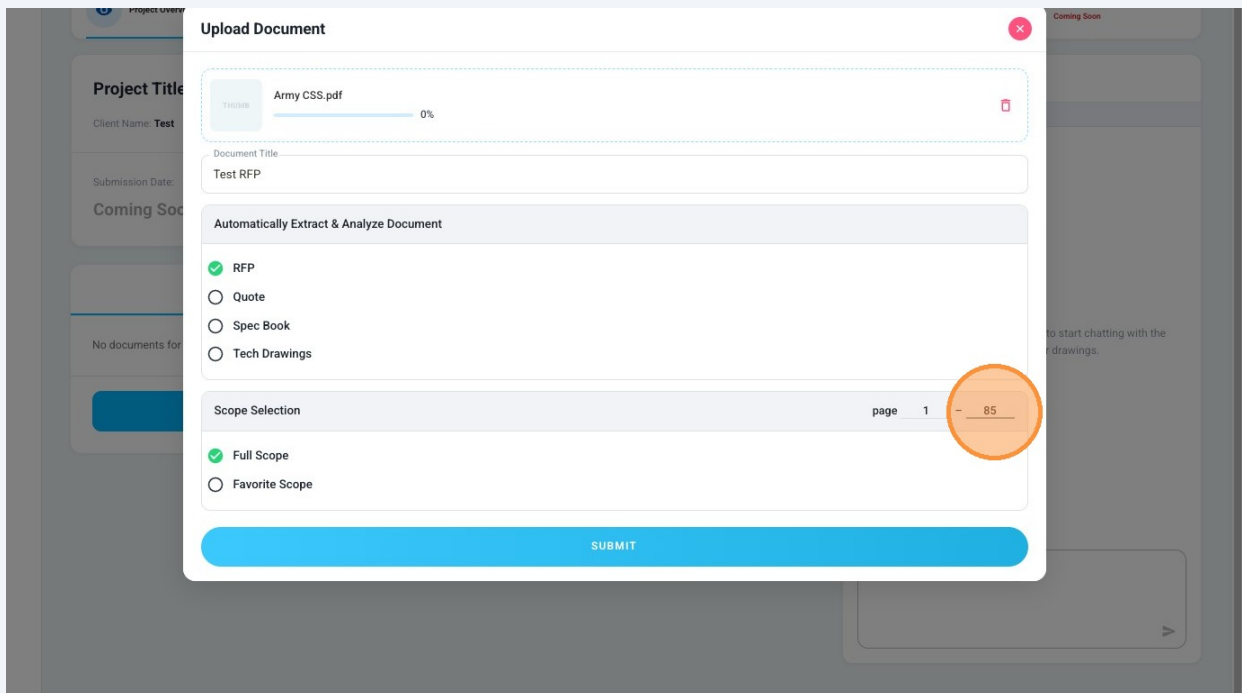
10

If the document is an RFP type document or a text based document. Select "RFP" as the document type



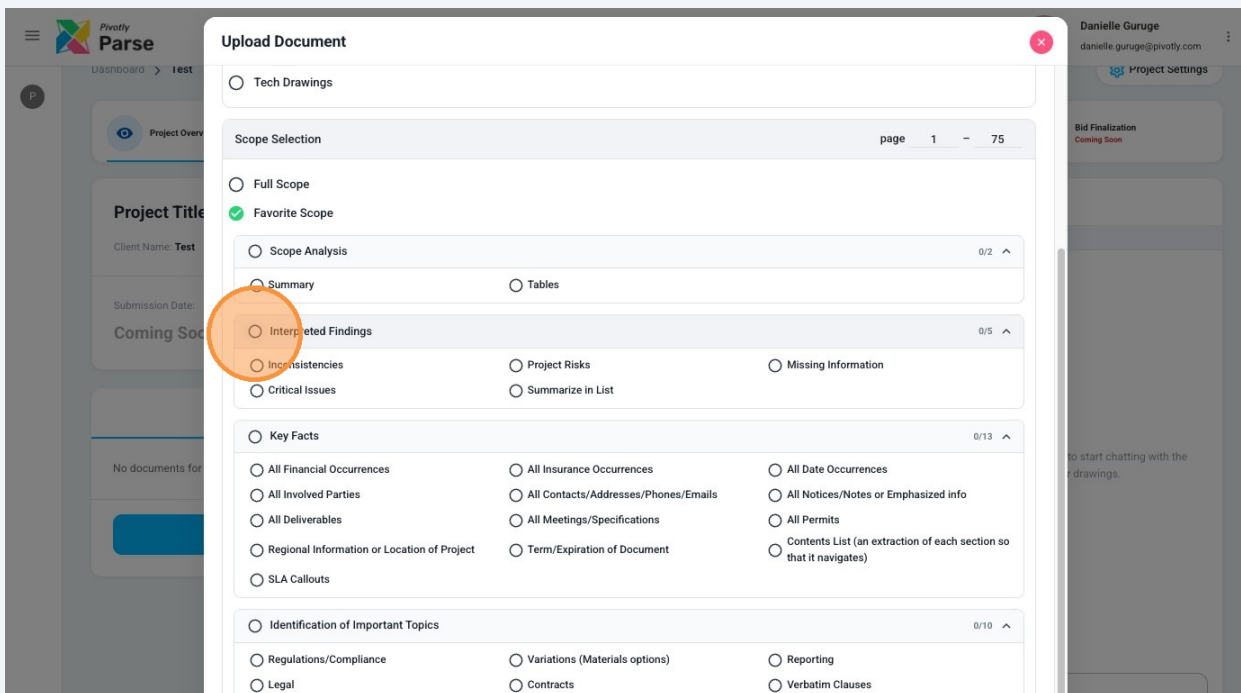
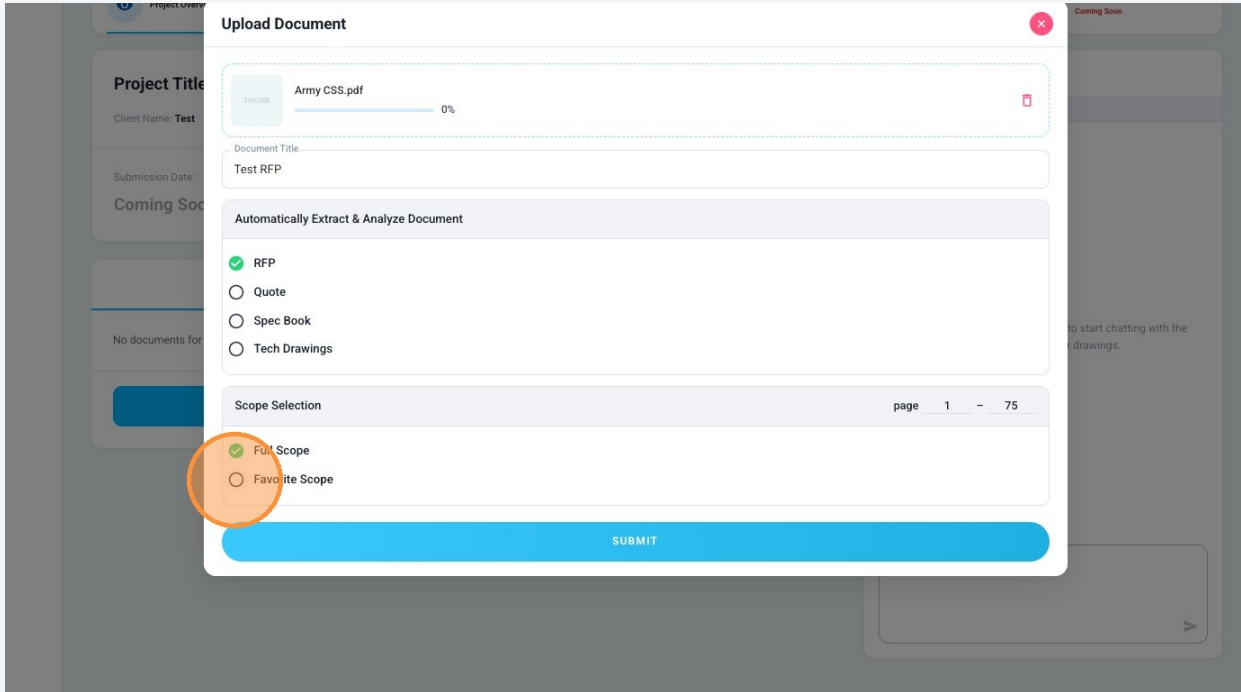
11

You can select just the page range that you want to have the AI analysis performed on. If you only want to have a section of the document of a large document you may get more refined results.



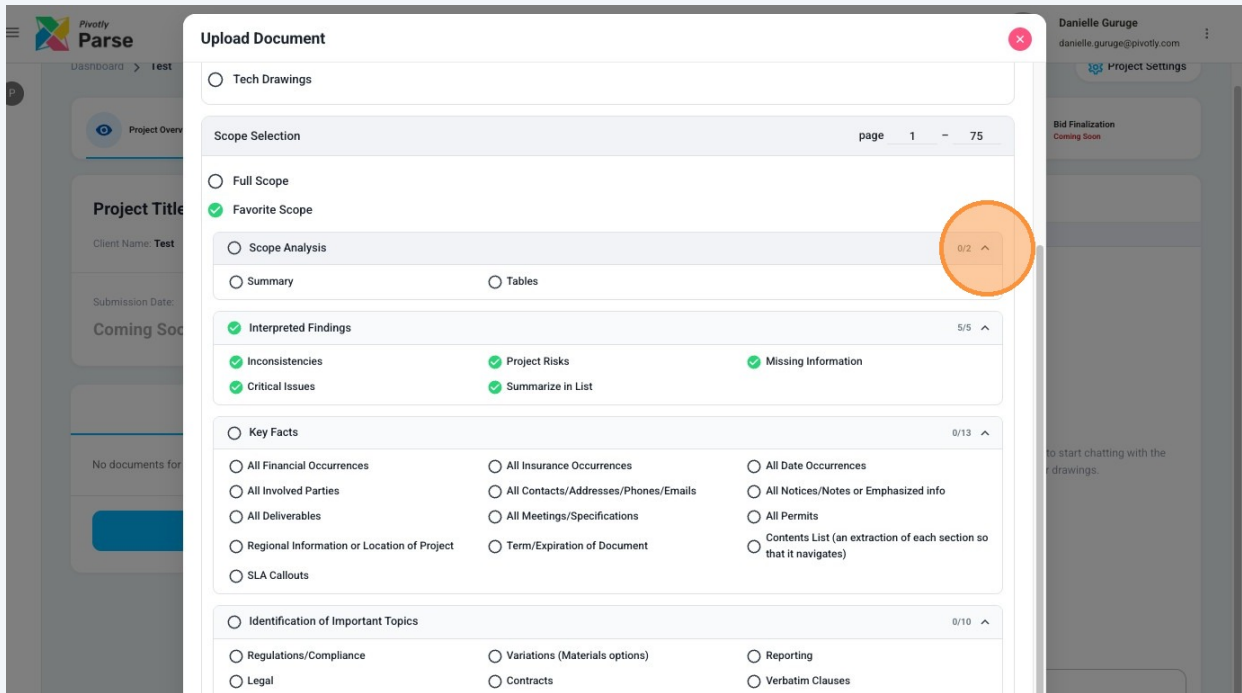
12

If you select "Full Scope" you will get all of the results for the AI analysis. This may be a lot of results, especially for larger documents. To perform a smaller AI analysis or to just pick the items you need, select "Favorite Scope"



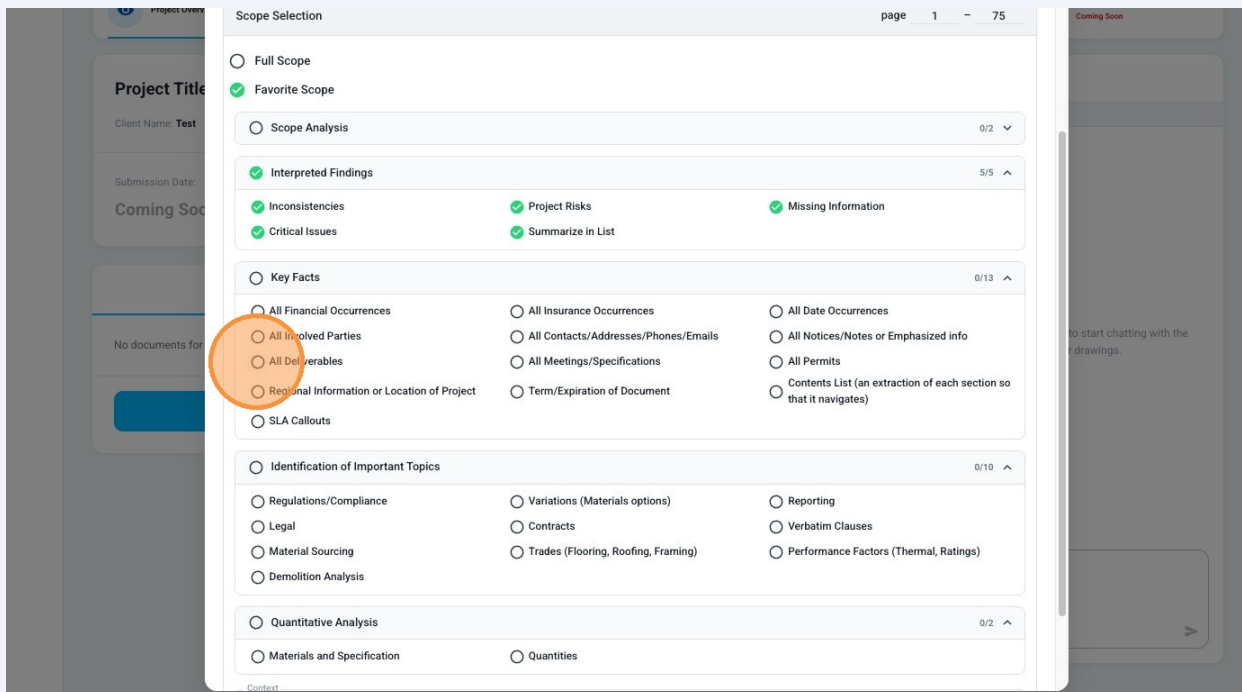
13

From the Favorite Scope screen you are able to configure the results that will be presented to you. You can select as many or as few as you need depending on the document.



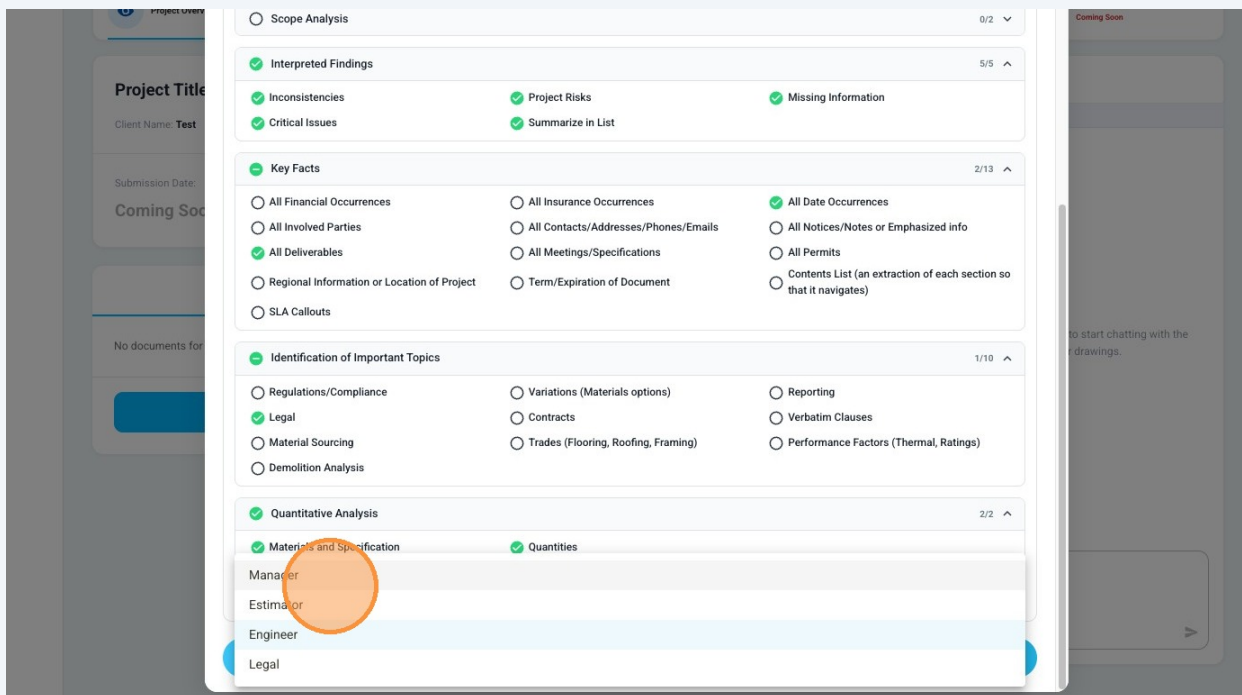
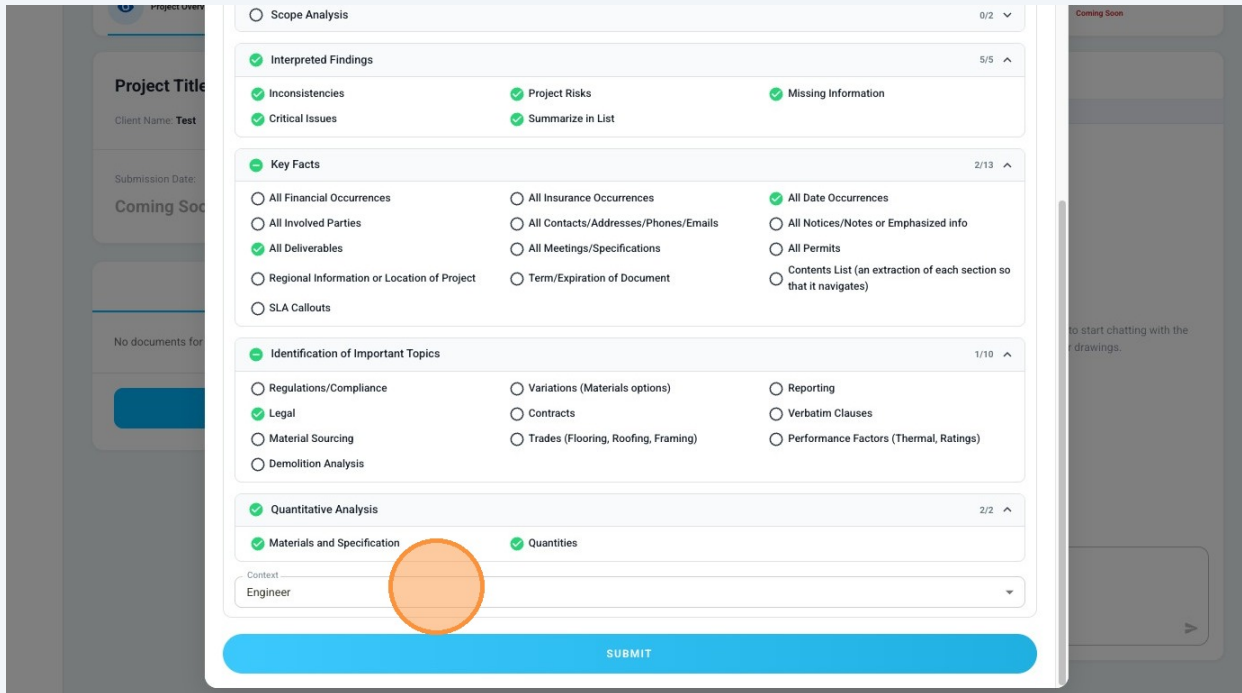
14

You are able to select either the whole category, multiple items under one category or even just one item under the category.



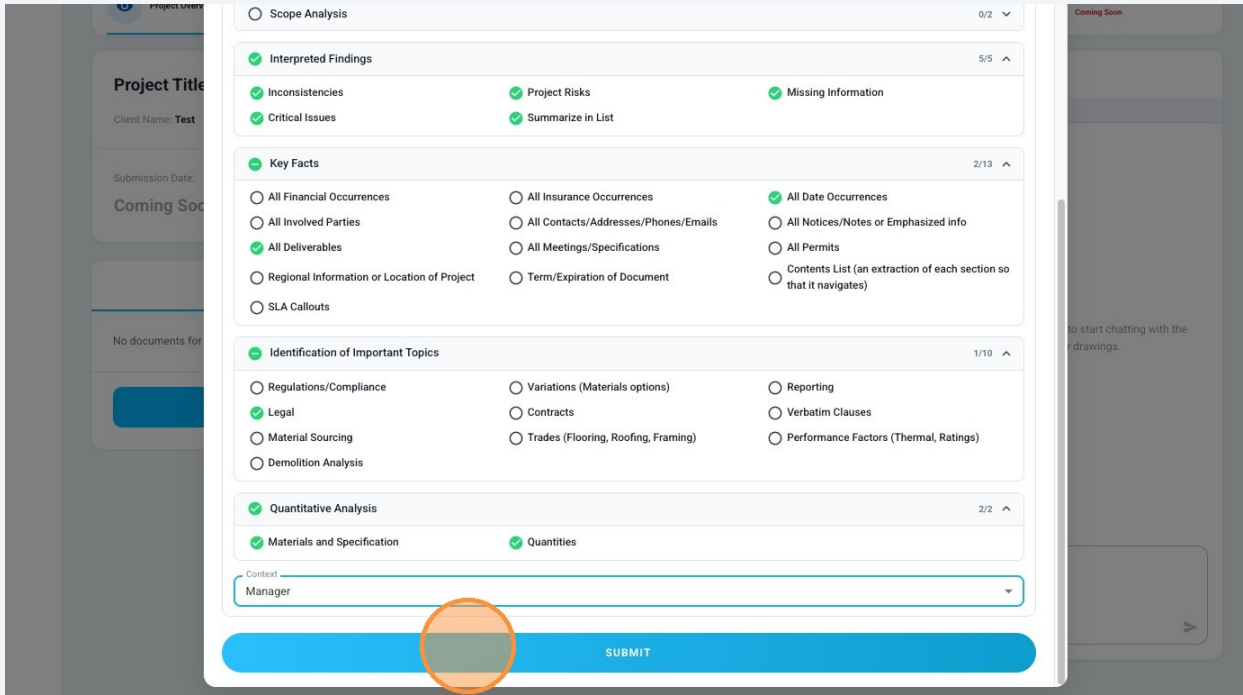
15

The context dropdown allows you to decide on the persona that the AI will be using when it is analyzing your document. You can select the persona that would make the most sense for your document.



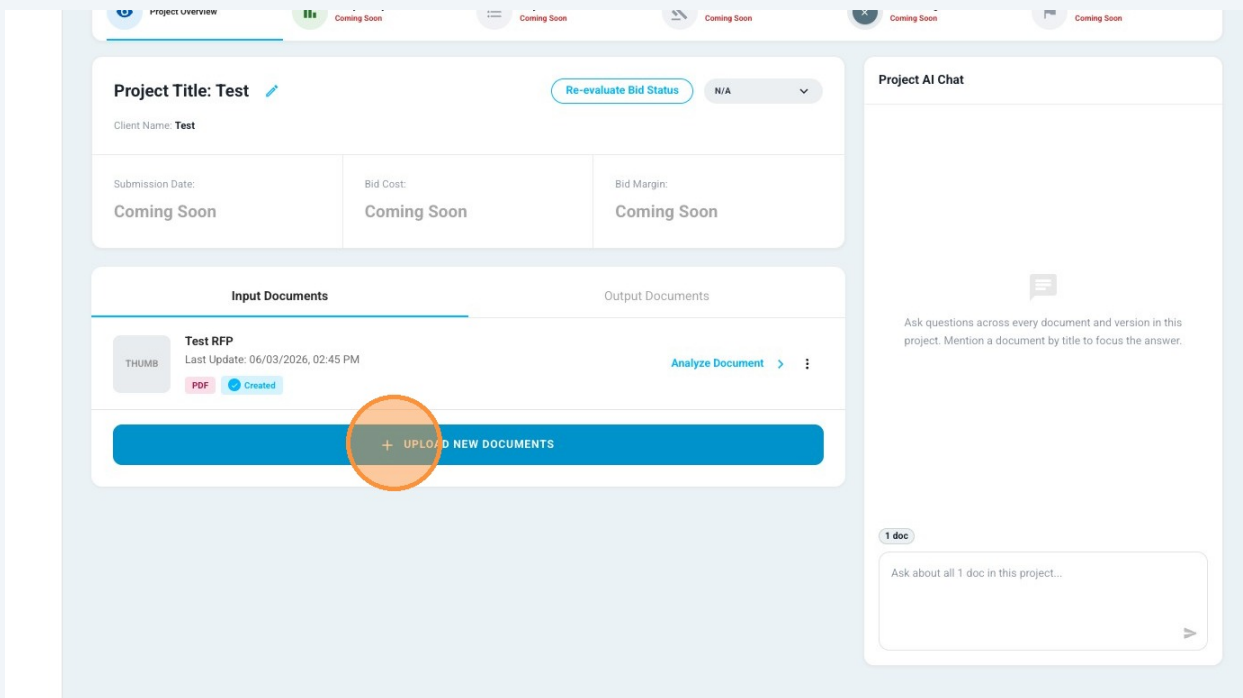
16

Click "Submit" - This document will now automatically process and the results will be ready for you to view once it is completed.



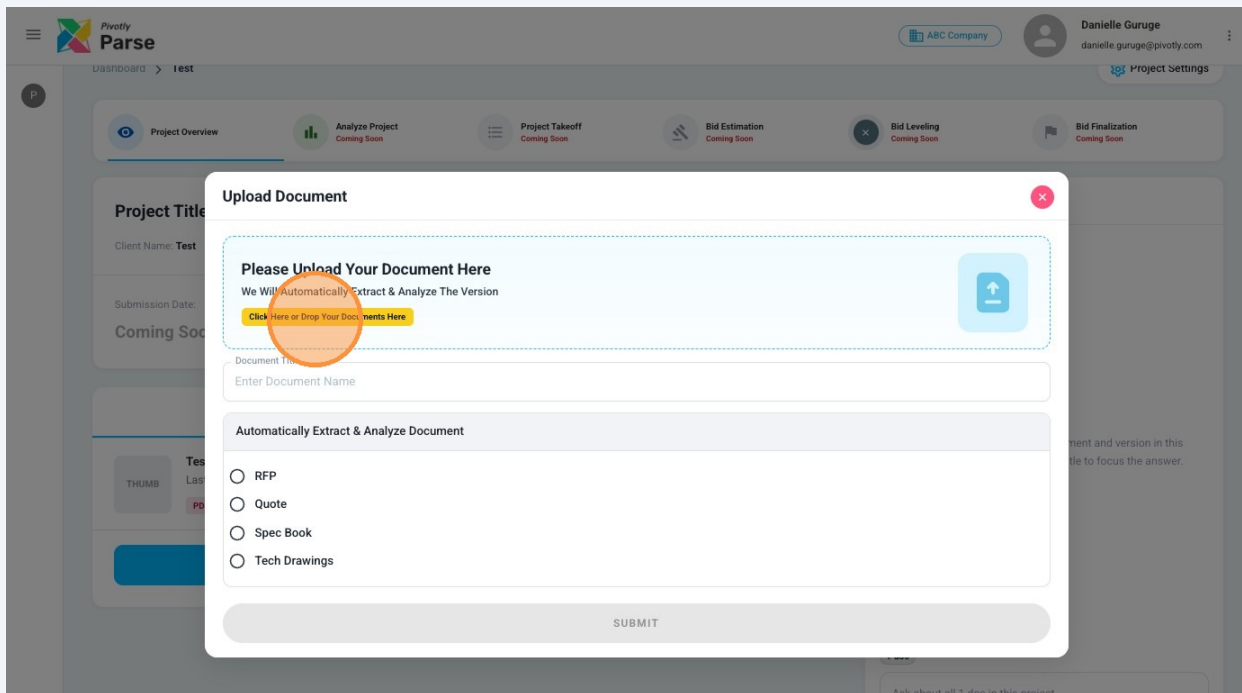
17

To upload another document to your bid package, you can click on the "Upload New Document" button.

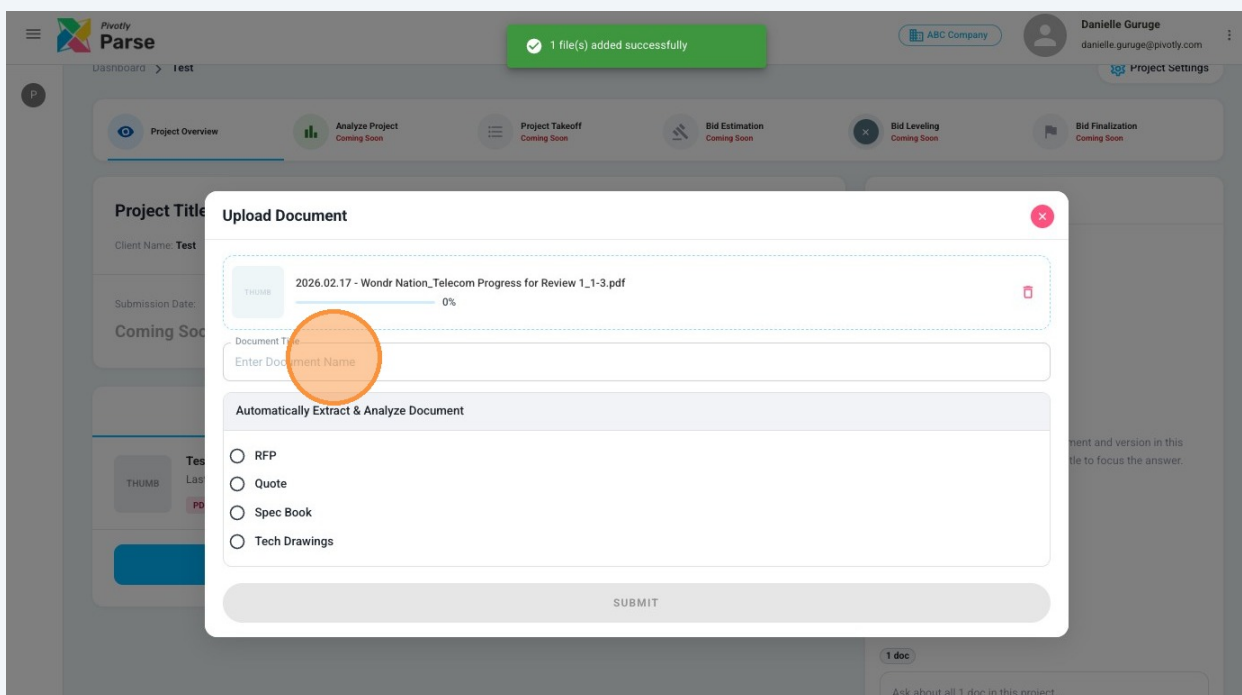


Multiple Document Uploads

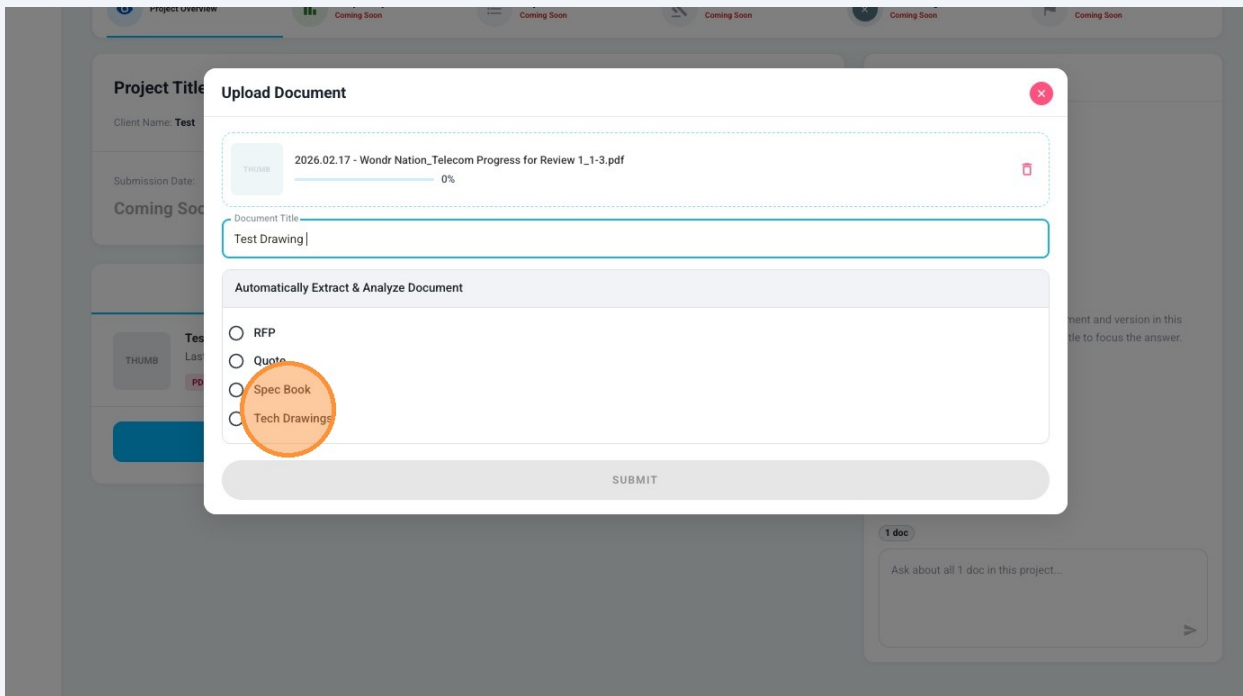
18 Click the upload area to select a document



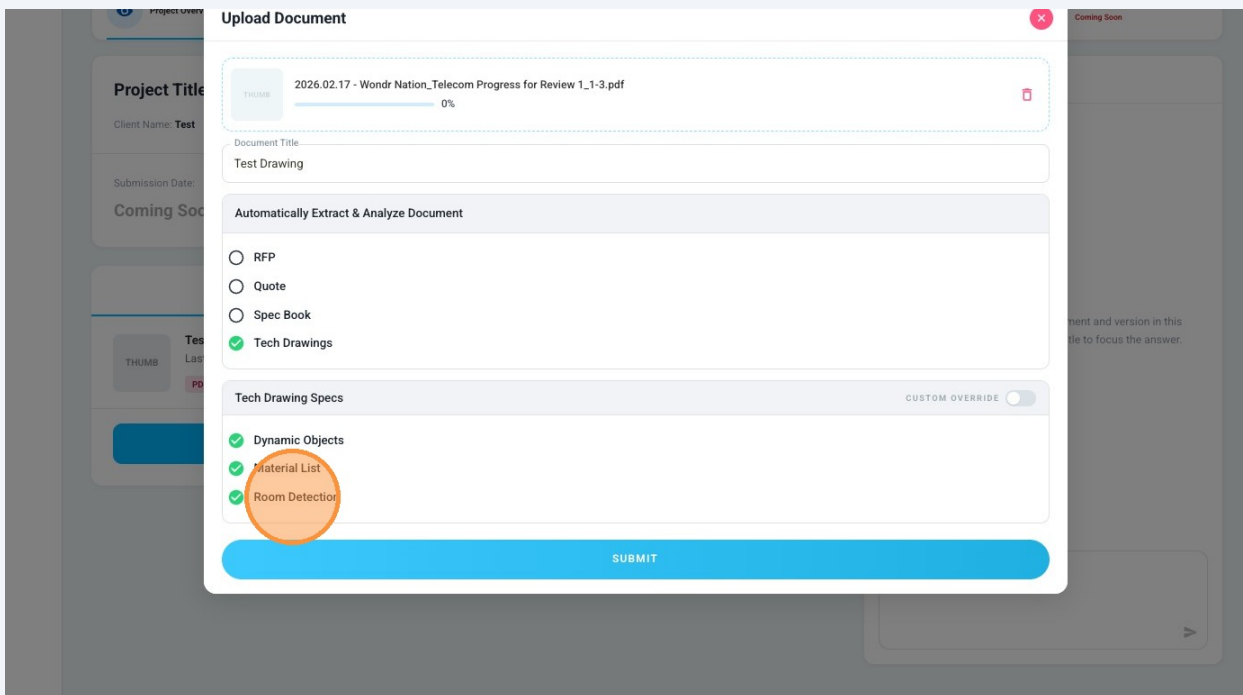
19 Type the name of the document



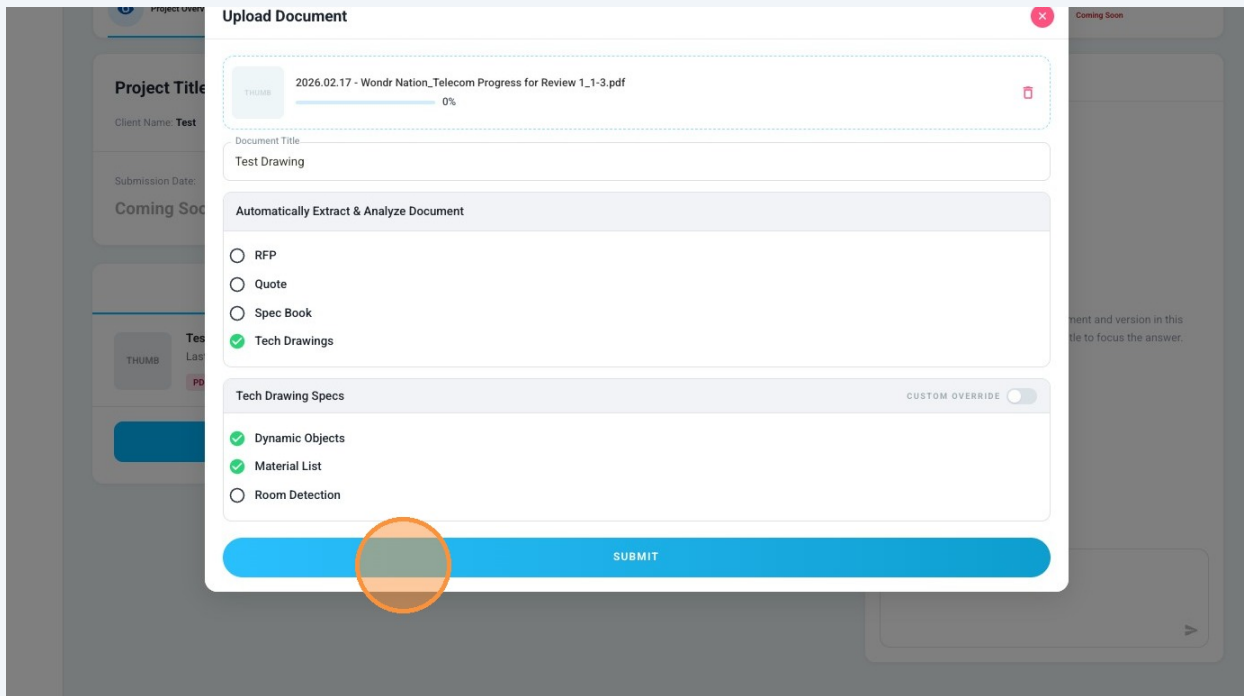
20 Select "Tech Drawings" as the document type



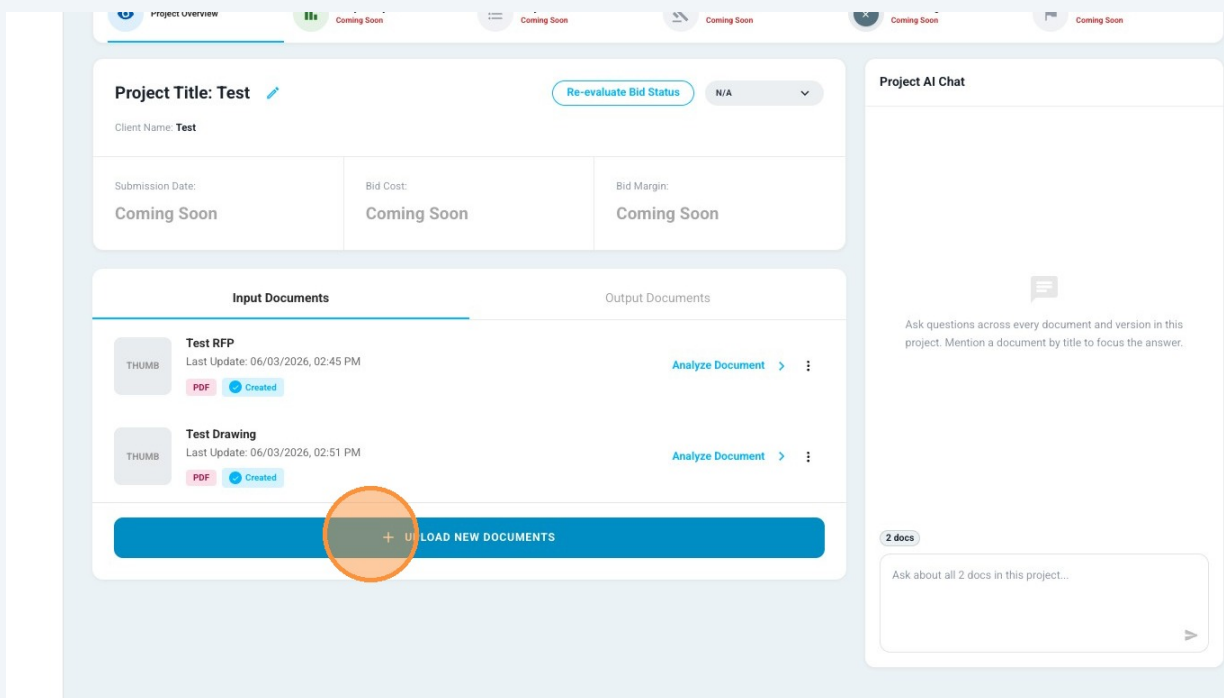
21 For tech drawings, you are able to select dynamic objects (symbols, shapes, fixtures), Materials List (materials and quantities), or Room Detection.



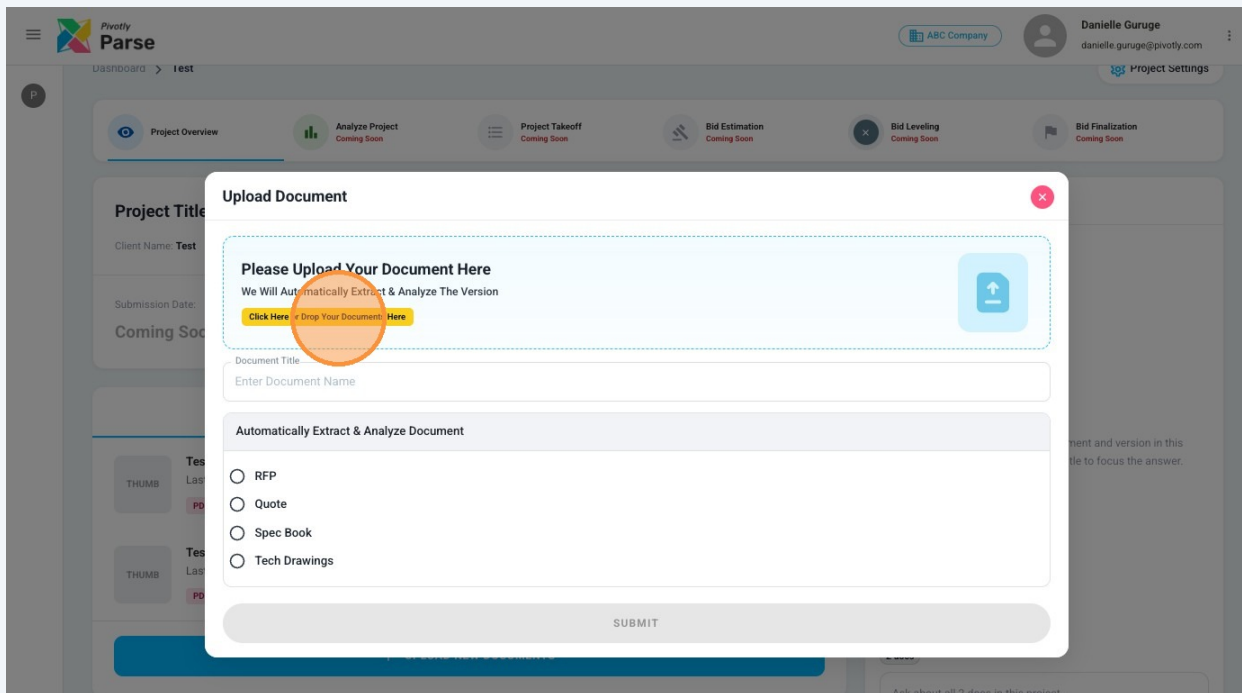
22 Click "Submit"



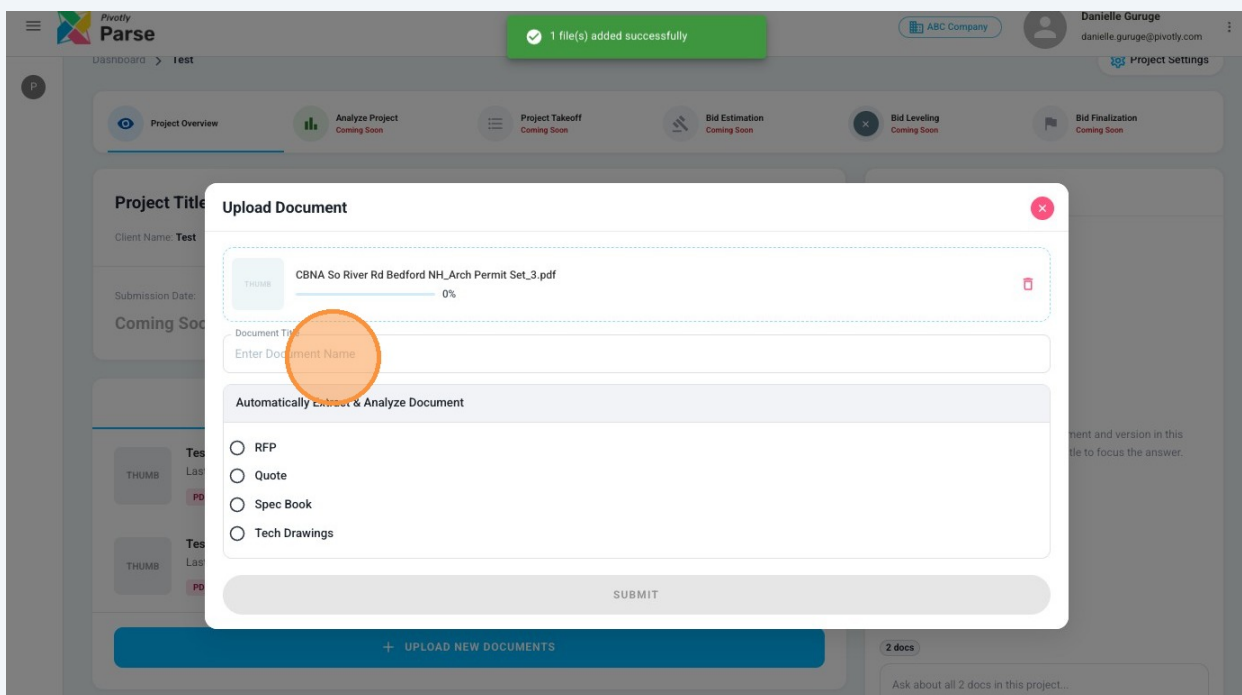
23 To add another document to the project, you will click "Upload New Documents"



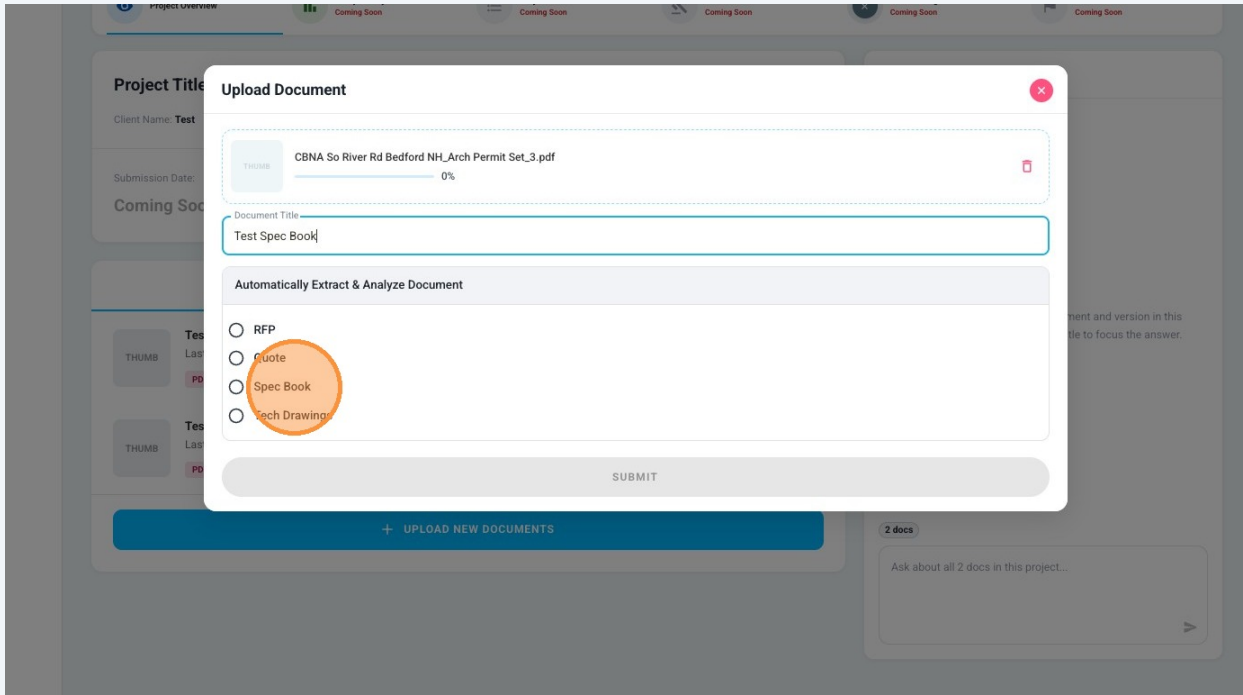
24 Click the upload area to select a document



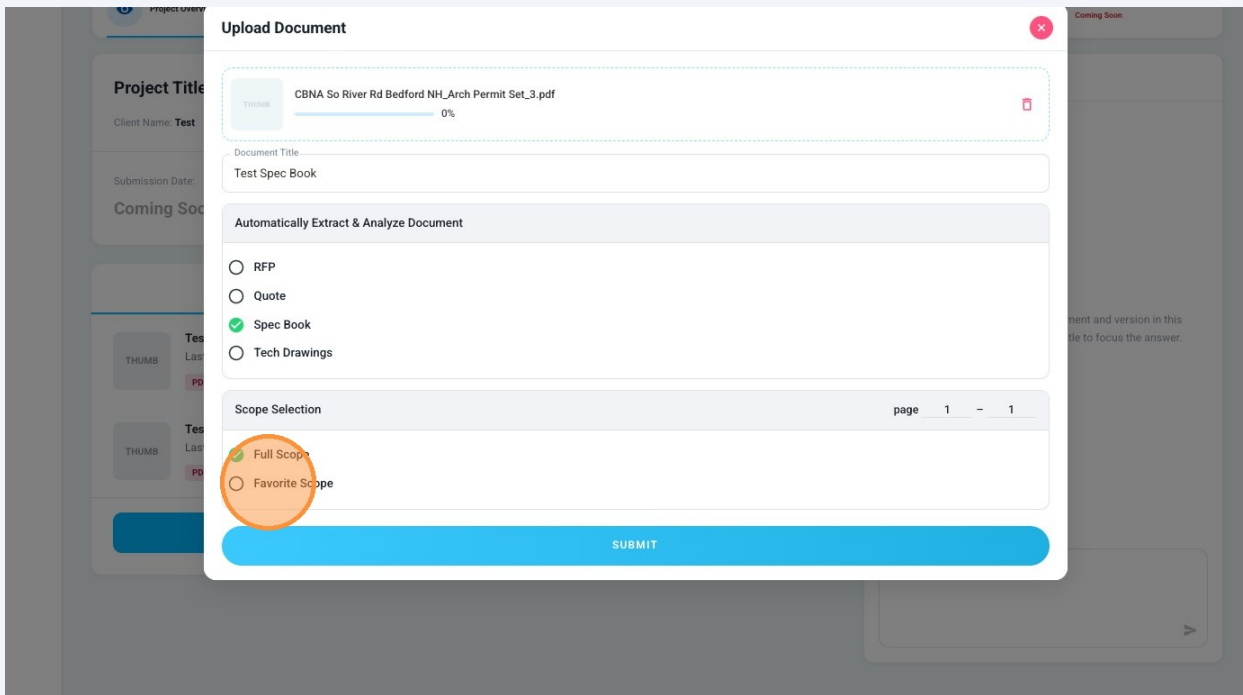
25 Type the name of the new document

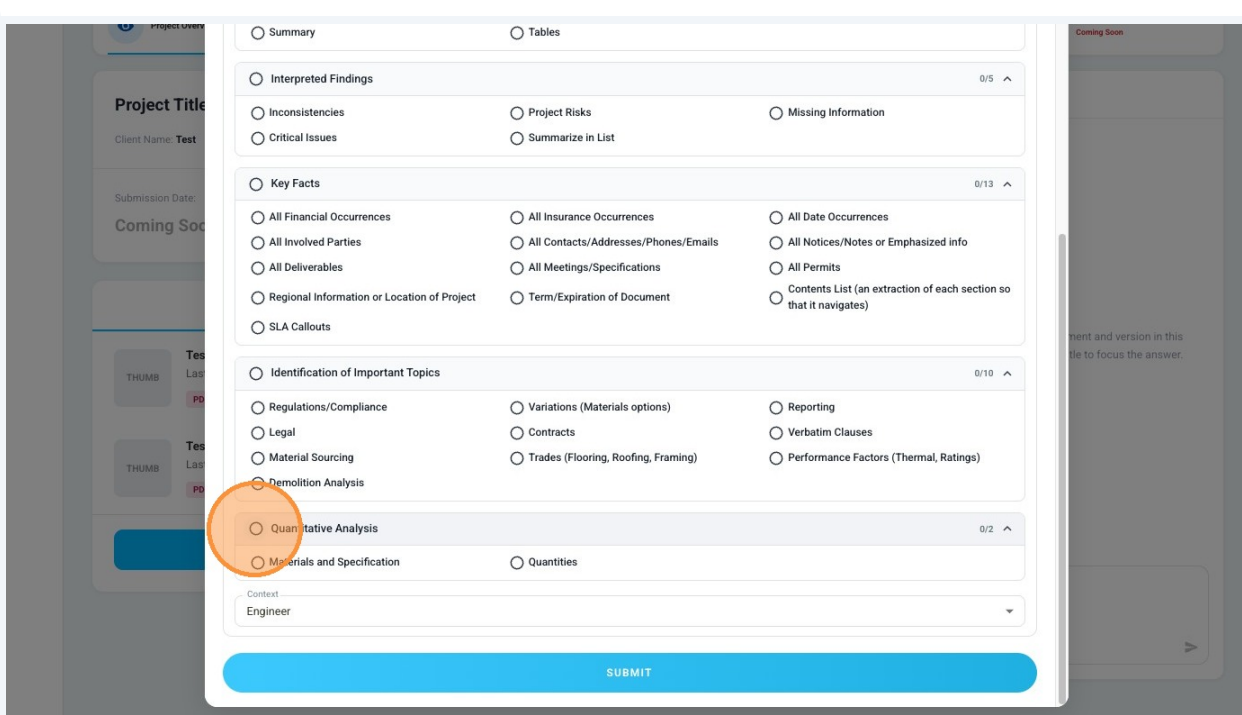


26 Select "Spec Book" as the document type



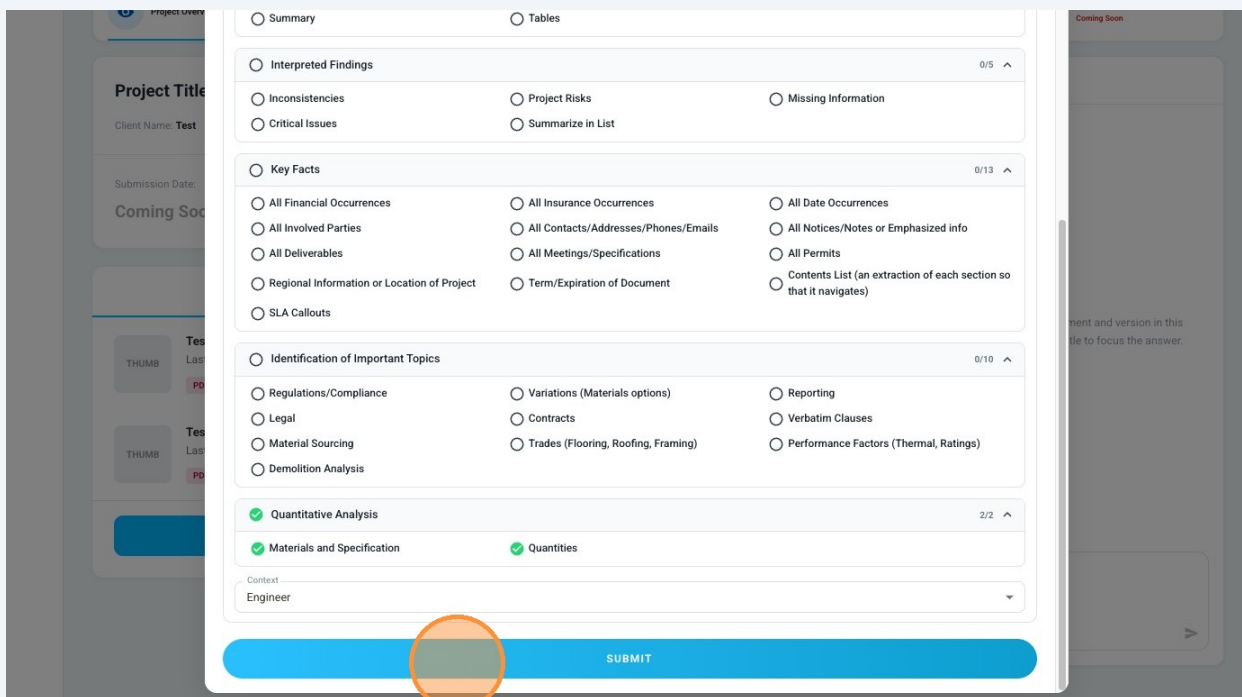
27 Similar to the RFP workflow, you can select full scope or you can select favorite scope.





28

For this example in the spec book, we only selected the materials and specification and quantities as the scope for the AI analysis.



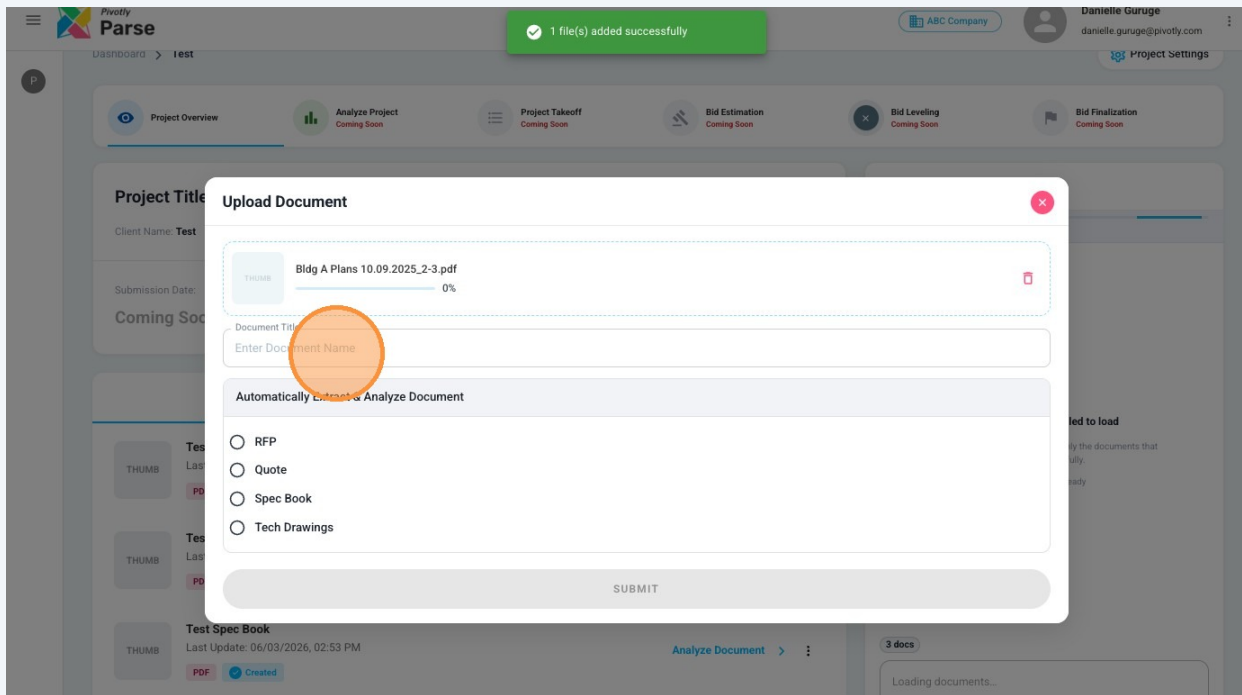
29 For any additional documents, you will click "Upload New Documents"

The screenshot displays the 'Project Overview' page for a project titled 'Test'. The page includes a navigation bar with tabs for 'Project Overview', 'Analyze Project', 'Project Takeoff', 'Bid Estimation', 'Bid Leveling', and 'Bid Finalization'. The main content area shows project details such as 'Client Name: Test', 'Submission Date: Coming Soon', 'Bid Cost: Coming Soon', and 'Bid Margin: Coming Soon'. Below this, there are sections for 'Input Documents' and 'Output Documents'. The 'Input Documents' section lists three documents: 'Test RFP', 'Test Drawing', and 'Test Spec Book', each with a 'PDF' icon and a status indicator (e.g., 'Indexed', 'Created'). A blue button labeled '+ UPLOAD NEW DOCUMENTS' is highlighted with an orange circle. To the right, a 'Project AI Chat' window is visible, showing a loading status and a message: 'Some documents failed to load. Loaded 2 of 3. The chat will use only the documents that loaded successfully. 2/3 documents ready.'

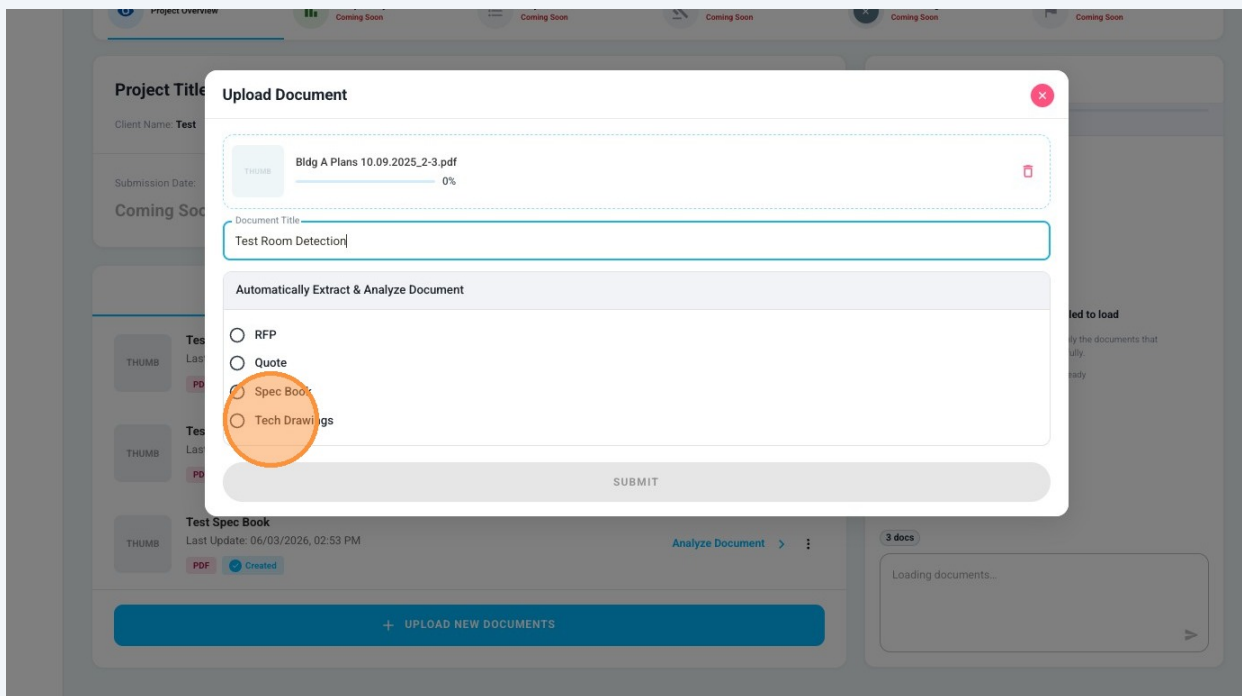
30 Click the upload area to select a document

The screenshot shows the 'Upload Document' modal dialog box. The dialog has a title bar with a close button. The main content area contains the text 'Please Upload Your Document Here' and 'We Will Automatically Extract & Analyze The Version'. A yellow button labeled 'Click Here or Drop Your Documents Here' is highlighted with an orange circle. Below this, there is a text input field for 'Enter Document Name'. The dialog also features a section titled 'Automatically Extract & Analyze Document' with four radio button options: 'RFP', 'Quote', 'Spec Book', and 'Tech Drawings'. At the bottom of the dialog is a 'SUBMIT' button.

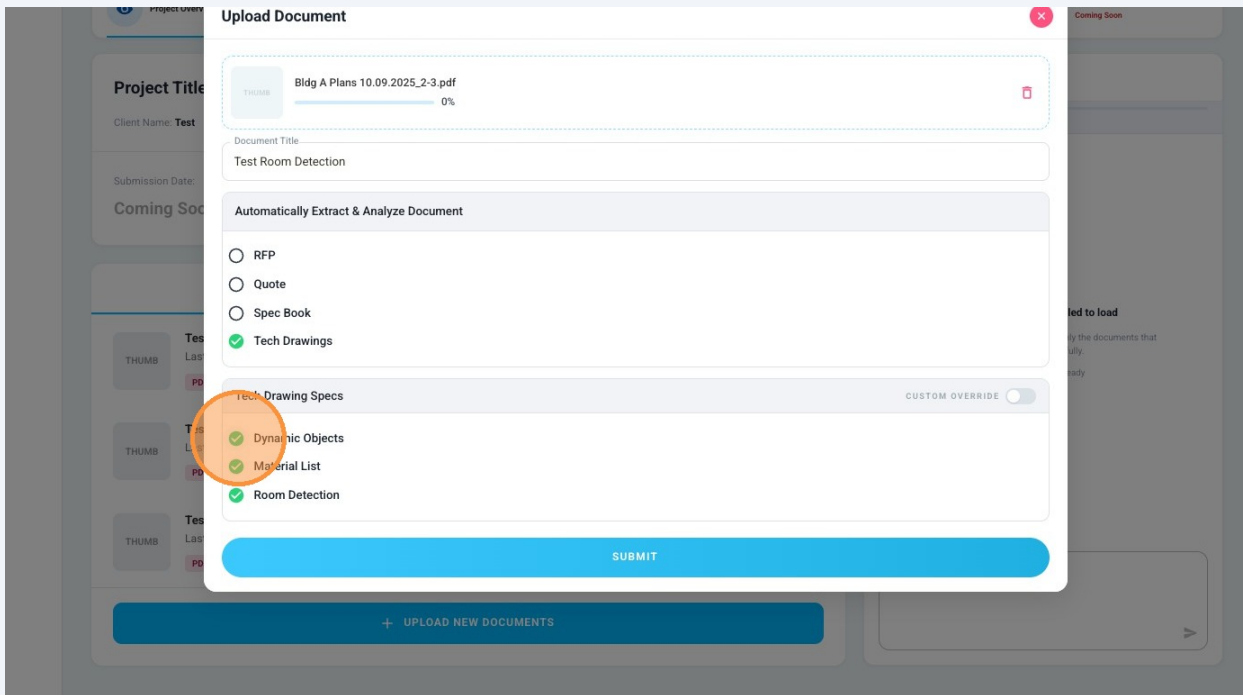
31 Name the document



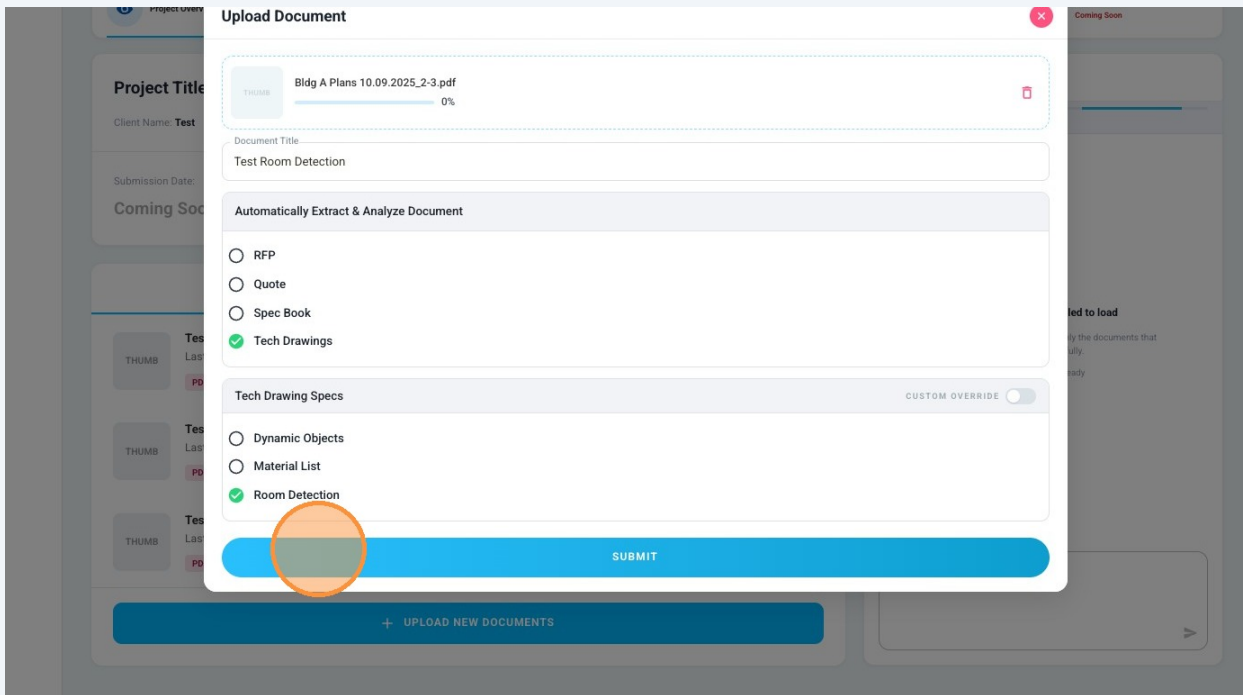
32 Select "Tech Drawings" as the document type



33 For this example, we want to have room detection



34 Click "Submit"



35

You are able to add as many documents as needed to the project by following these steps.