



SwiftServ

Sales Co-pilot for IT & Tech

User Guide 1.2

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SwiftServ User Guide

SwiftServ User Guide, Release 1.2

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SwiftServ User Guide

About SwiftServ

SwiftServ is a Gen AI Agent to assist Sales and Support for IT & Tech companies. It helps Sales, Pre-sales and Support people to respond customers faster on any sales or support query, understanding complex requirements and generate Sales proposal using Gen AI capabilities.

This guide is designed to be used by both the implementation team as well as the user group and assumes a basic level of understanding of Atlassian Jira and Confluence functionalities.

About B4B Technologies

B4B Technologies is a software company working deeply in the are of Gen AI and Machine Learning based in Berkeley, California and Bangalore, India.



SwiftServ User Guideline

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Introduction:

SwiftServ is a productivity tool driven by AI that helps companies effectively handle and communicate with massive amounts of documents. With SwiftServ's seamless integration with the Confluence Marketplace, teams can quickly summarise long documents, create customised RFP questions, automatically draft expert proposals, and use an intelligent chatbot to retrieve important information. The platform helps companies speed up workflows, cut down on manual labour, and make better decisions more quickly by automating tasks that have historically taken a lot of time.

SwiftServ, which was created especially for the B2B market, integrates cutting-edge AI capabilities with an intuitive user interface right within Confluence. SwiftServ enables businesses to get more out of their knowledge base, whether that means creating customised proposals, summarising complex reports, creating RFPs, or providing real-time answers to document-specific queries. Focussing on accuracy, efficiency, and teamwork, SwiftServ revolutionises how businesses handle, create, and interact with complex documentation.

SwiftServ Benefits:

1. Faster Project Sales proposal creation including Solution details and SOW generation using pre-defined templates
2. Automation of RFP Responses
3. Audio & Video transcription of Sales web-meetings and Meeting summary generation
4. Mindmaps generation
5. Project summary document creation on customer requirements
6. Proposal review automation
7. Faster resolution of Sales queries
8. Creation of Company-wide private knowledgebase using all unstructured data including Jira stories and Confluence documents



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SwiftServ Features:

1. Opportunity Space Creation

- Automatically generates dedicated Confluence Spaces and Pages for each opportunity. Each space is organized for users to upload, manage, and collaborate on documents and proposals.

2. Document Upload & Management

- Users can upload a variety of content types, including documents, diagrams, and videos, directly into the Opportunity space for easy access and sharing.

3. Proposal Generation

- Generate proposals either from existing documents or from scratch. SwiftServ uses AI to help users quickly create comprehensive proposals with minimal effort.

4. Document Review & Collaboration

- Review documents collaboratively within the Opportunity space. Users can leave comments, track changes, and engage in real-time discussions to refine and finalize documents.

5. AI-Powered Document Summarization

- Summarize large documents automatically using AI, making it easier to understand complex content and extract key information quickly.

6. RFP Question Generation

- SwiftServ can generate tailored RFP questions based on the context of the documents, saving time on preparing detailed, specific questions for proposals.

7. Chatbot for Document Queries

- The integrated AI-powered chatbot helps users ask document-specific questions and get immediate answers, providing real-time assistance without leaving the platform.

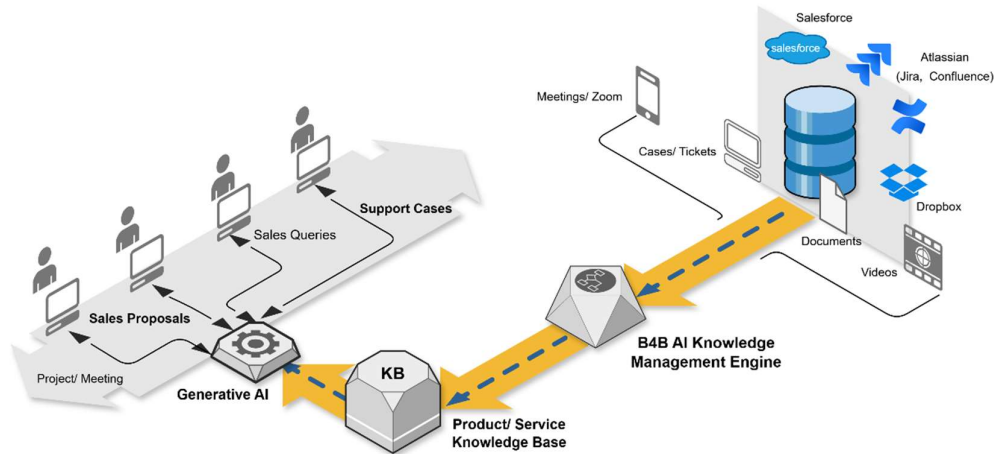
8. Seamless Confluence Integration

- Fully integrated with Confluence Marketplace, allowing businesses to work directly within their existing Confluence environment without needing to switch platforms.



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SwiftServ Architecture & Flow



App Login

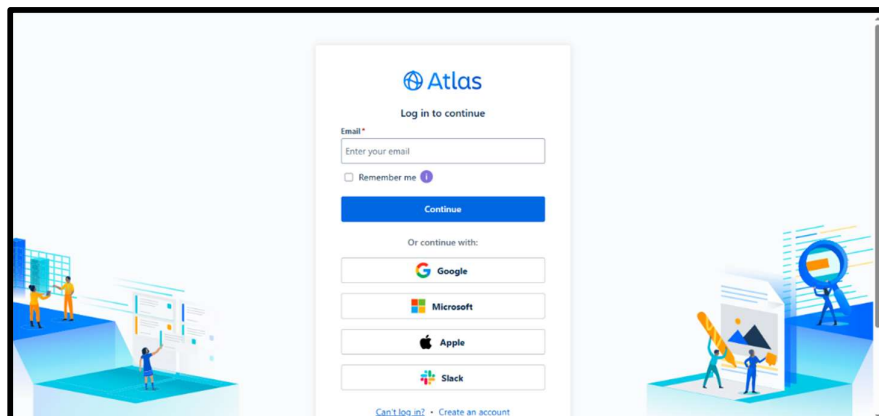
Follow the steps below to log in and start using the **SwiftServ** :

Step 1: Go to Atlassian Home

Open your browser and navigate to:
<https://home.atlassian.com>

Step 2: Sign in to Atlassian

Log in using your **Atlassian account credentials** (email and password).

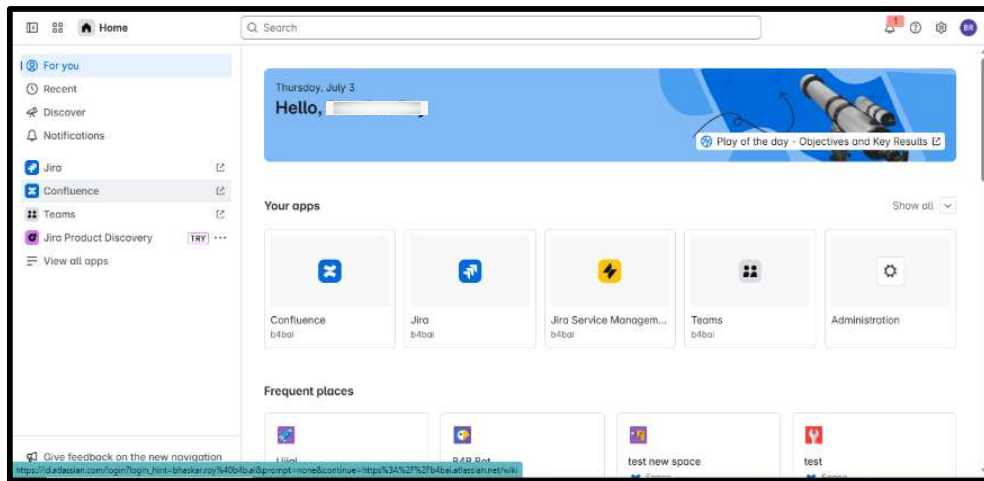




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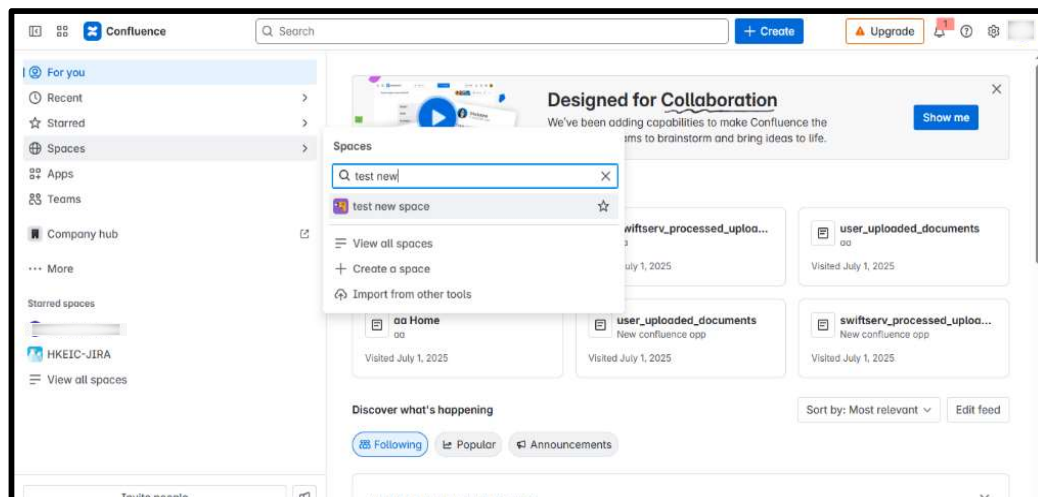
Step 3: Access Confluence

After logging in, go to **Confluence** from the Atlassian dashboard.



Step 4: Navigate to a Space

1. On the left-hand sidebar, locate the **"Spaces"** section.
2. Use the search bar or browse to find and open any Confluence Space.
3. Inside the space, scroll down to the **"Space Apps"** section in the sidebar.

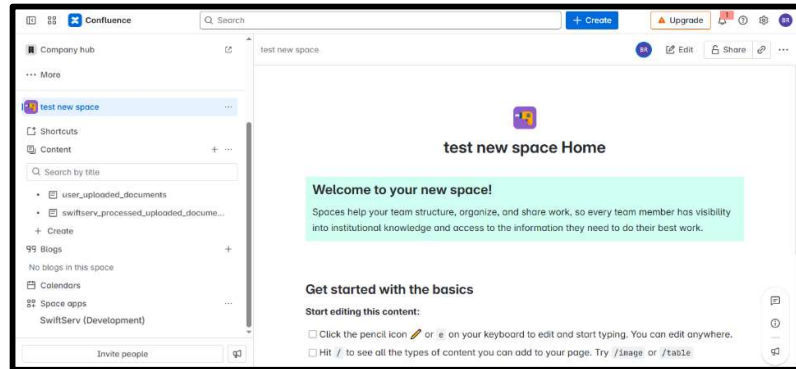




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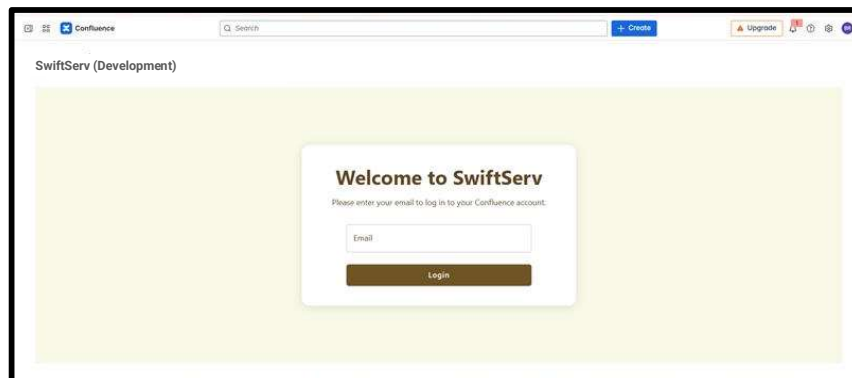
Step 5: Launch Swiftserv

- In the **Apps** section, look for **Swiftserv**.
- Click on the app to open it.



Step 6: One-Time Email Prompt

- The first time you open the app, Swiftserv will ask for your **email address**.
- Enter it once — and you're all set!

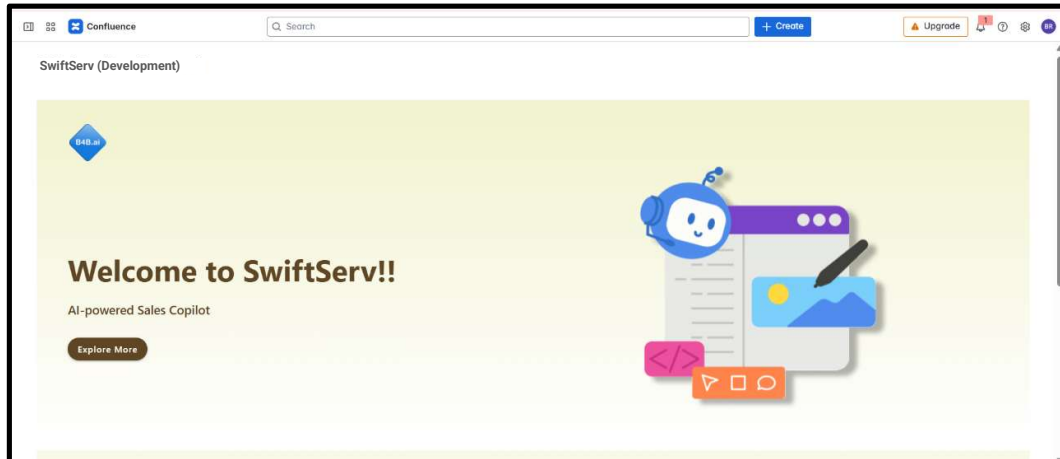


You're now ready to use the Swiftserv App!

Start exploring features, managing templates, and simplifying your proposal process — all within Confluence.



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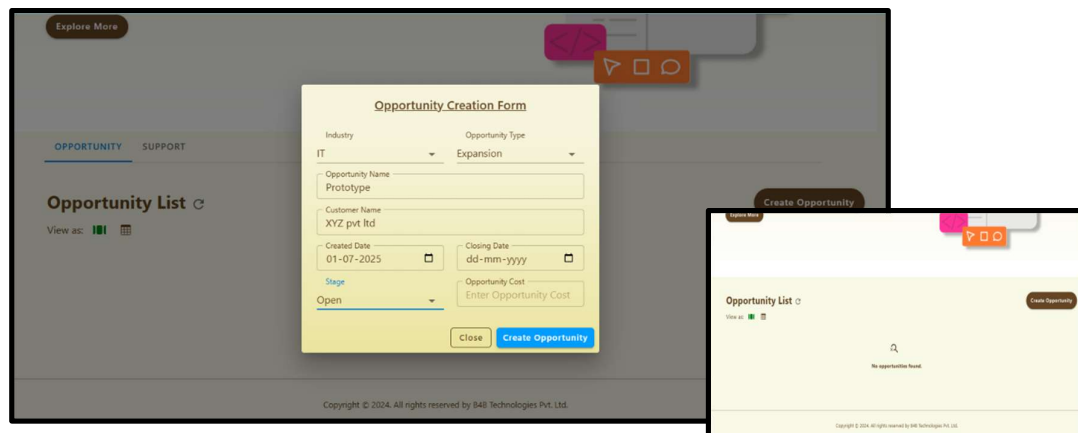


1. The first page that appears will feature an initial view, and upon clicking the Explore More button, users will be smoothly slide down to the Opportunity List section.

Note: If there are no spaces in your Confluence account, the section will appear as shown below.

2. If there are no opportunities, the user can create a new opportunity by clicking the Create Opportunity button.

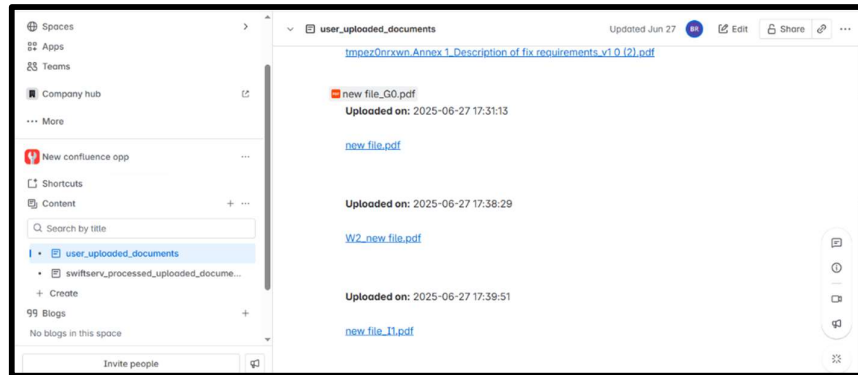
Note: By creating an Opportunity, a corresponding Confluence space is automatically created with the same name as the Opportunity. All documents associated with the Opportunity including those manually uploaded by the user and those automatically processed by SwiftServ are systematically stored on their



designated Confluence pages:



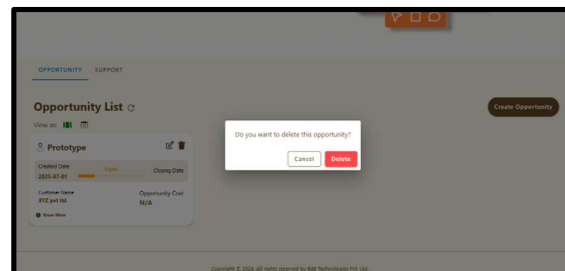
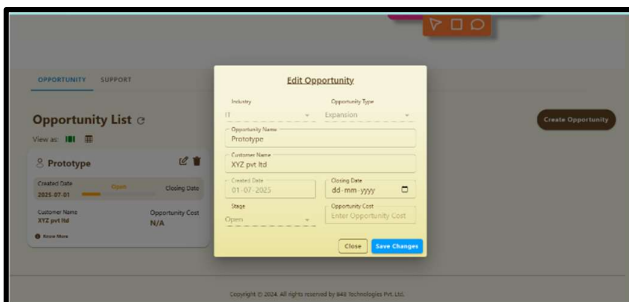
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user_uploaded_documents – Contains files directly uploaded by users.
swiftserv_processed_uploaded_documents – Contains files processed and enriched by the SwiftServ system

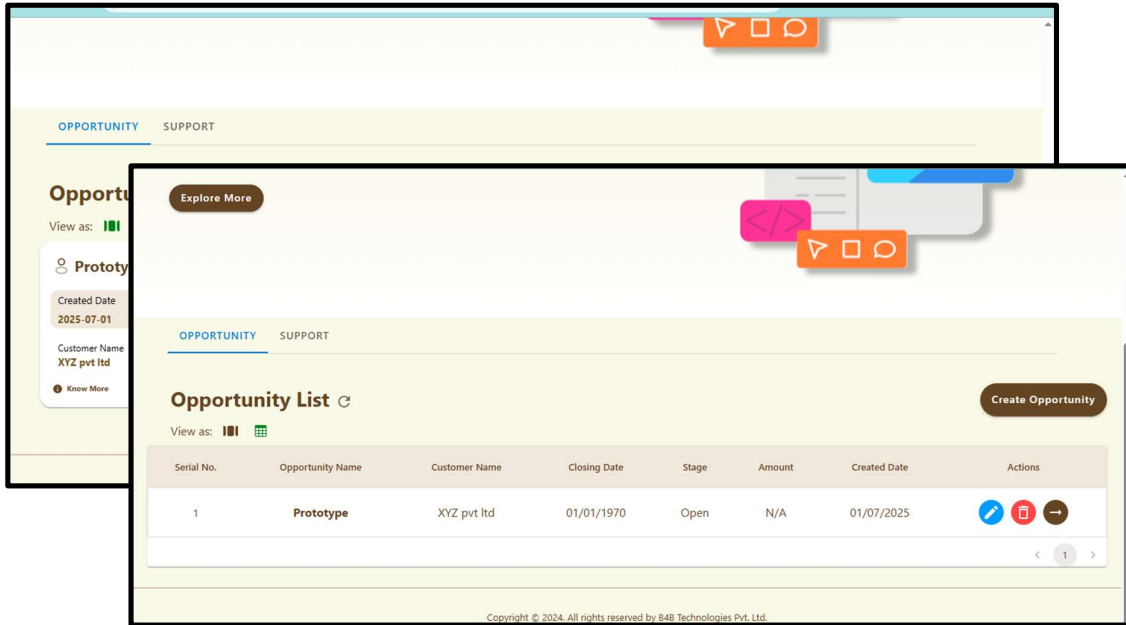
3. In the **Opportunity List** section, each opportunity represents a dedicated space within the Confluence app.

Note: The user can delete or edit each opportunity by clicking on the respective icon buttons.





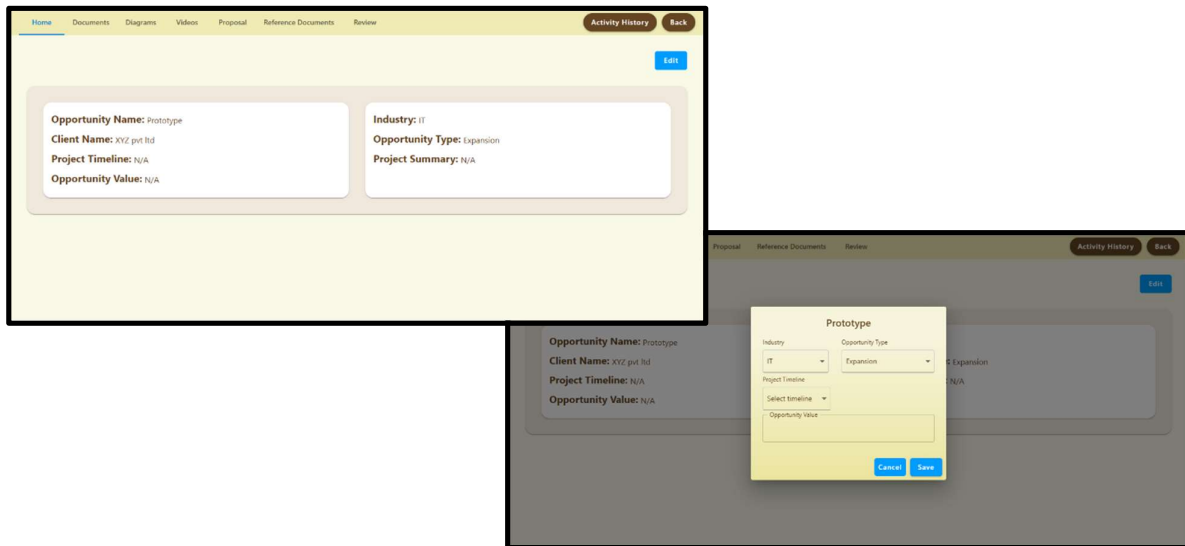
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4. For easier viewing and management, a Table View has been added. In this section, users can create, edit, or delete opportunities directly from the table.
5. By Clicking on the Support tab navigates the user to the Post-Sales Support section. Here, users can search for Jira issues and access them directly by clicking on the provided links. Additionally, a Support Bot is available to assist with common queries and provide guidance.
6. By clicking on the Know More button in the opportunity cards section, the user will be taken to the Opportunity Home section.



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Note: Here, the user can edit details such as the Project Timeline and Project Summary, Industry and Opportunity type and can switch between tabs using the navbar.

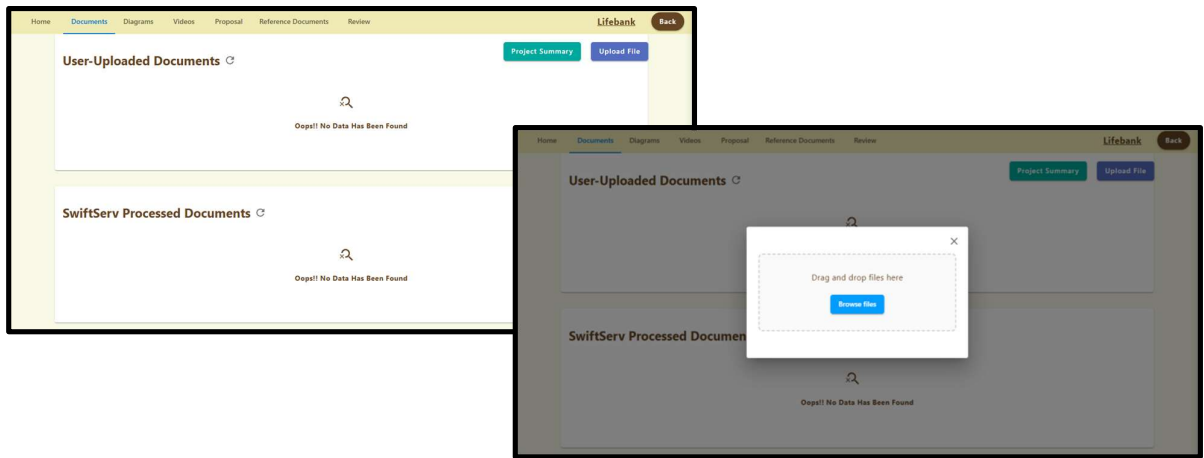
Document Section

7. Now, moving to the Documents Section, where users can upload, view, and manage all related documents for the opportunity.



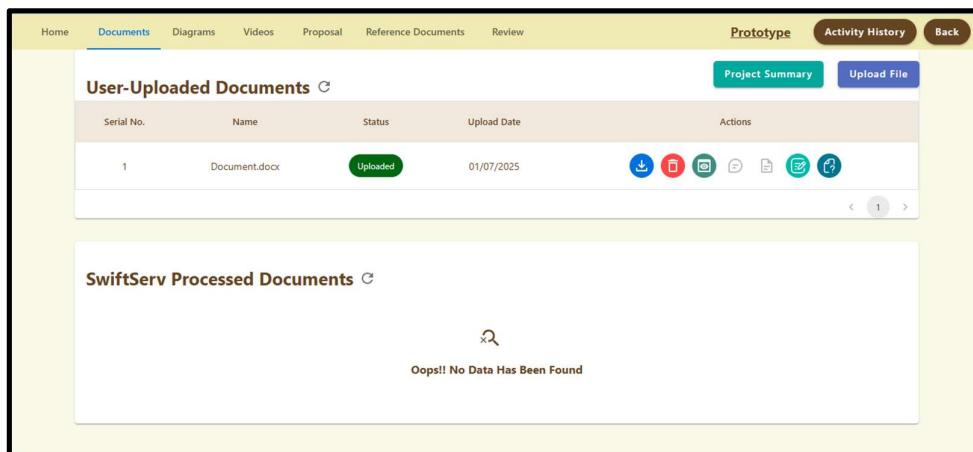
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8. After uploading a document, the user can see it listed in the User Uploaded Documents table.



Note: There are two buttons: one in the ChatView that will be enabled later, and another, **Generate Response**, which becomes active only for CSV or XLSX files.

9. By clicking the Create Summary button, SwiftServ will begin generating the summary and provide a result document, which will be displayed in the SwiftServ Processed Document section.



Note: After clicking the Create Summary button, the result document will appear in the SwiftServ Processed Documents table once complete. If the user clicks the Refresh button, the document in progress will be shown.

Video summaries can also be added, enabling the consolidation of textual and visual insights in one place.



SwiftServ User Guide

Home

Documents

Diagrams

Videos

Proposal

Reference Documents

Review

Prototype

Activity History

Back

User-Uploaded Documents

Project Summary

Upload File

Serial No.	Name	Status	Upload Date	Actions
1	Generated questions_Document.docx.xlsx	COMPLETED	01/07/2025	
2	Document.docx	Uploaded	01/07/2025	

<

1

>

SwiftServ Processed Documents

Serial No.	Name	Operations	Status	Upload Date	Actions
1	Document.docx	Created Summary	COMPLETED	01/07/2025	

<

1

>

HomeDocumentsDiagramsVideosProposalReference DocumentsReview

PrototypeActivity HistoryBack

User-Uploaded Documents

Project SummaryUpload File

Serial No.	Name	Status	Upload Date	Actions
1	Generated questions_Document.docx.xlsx	COMPLETED	01/07/2025	
2	Document.docx	Uploaded	01/07/2025	

<

1

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SwiftServ Processed Documents

Serial No.	Name	Operations	Status	Upload Date	Actions
1	Document.docx	Created Summary	IN_PROGRESS	01/07/2025	

<

1

>

10. When you click the Extract Questions button, SwiftServ will start extracting the questions and generate a result document, which will appear in the Uploaded Document section. After the questions are generated, you can create

Home

Documents

Diagrams

Videos

Proposal

Reference Documents

Review

Prototype

Activity History

Back

User-Uploaded Documents

Project Summary

Upload File

Serial No.	Name	Status	Upload Date	Actions
1	Generated questions_Document.docx.xlsx	COMPLETED	01/07/2025	Download Delete Share Print Export Refresh More
2	Document.docx	Uploaded	01/07/2025	Download Delete Share Print Export Refresh More

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1

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SwiftServ Processed Documents

Serial No.	Name	Operations	Status	Upload Date	Actions
1	Generated questions_Document.docx.xlsx	Generated Response	COMPLETED	01/07/2025	Download Delete Share

<

1

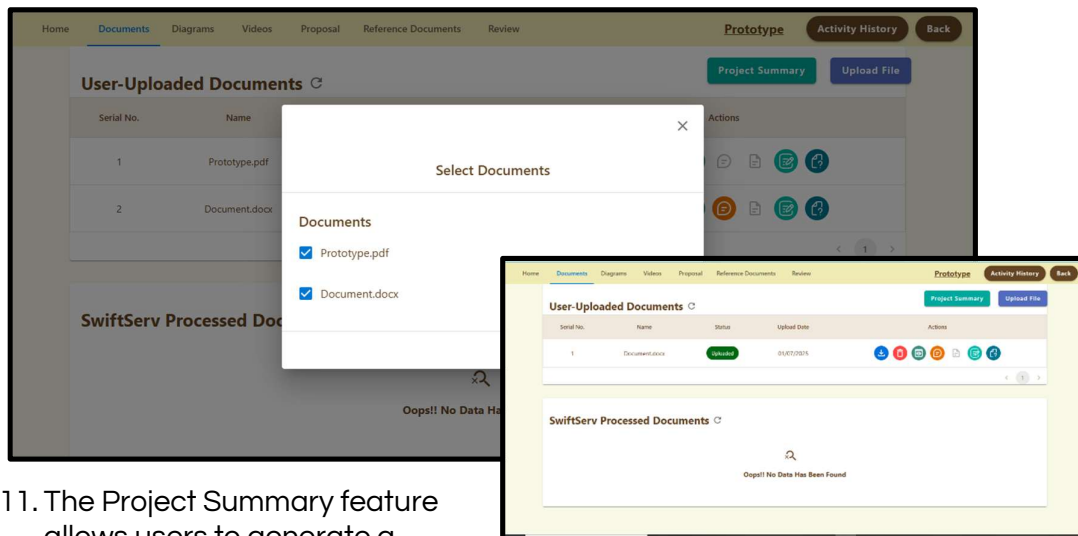
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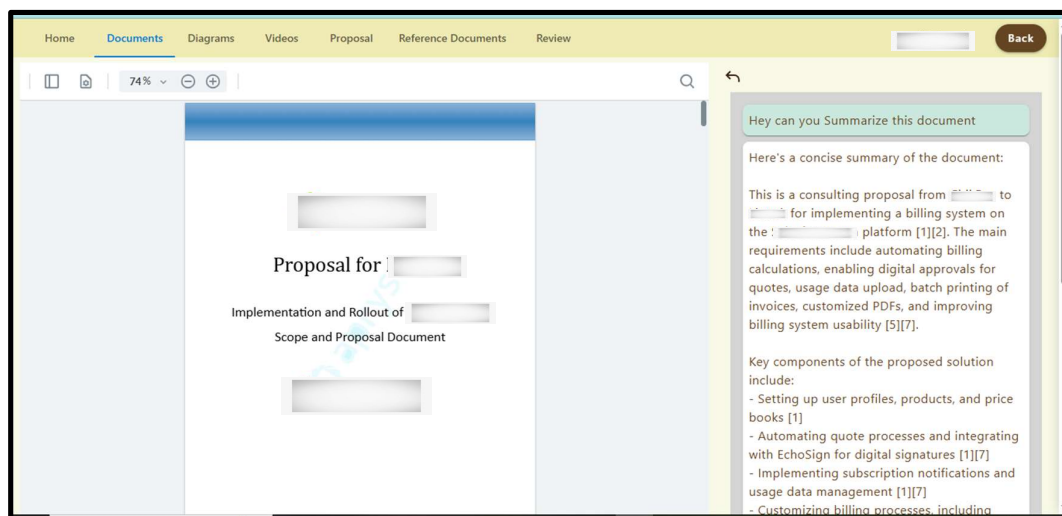
responses by clicking the Generate Response button, and the resulting document will be added to the SwiftServ Processed Documents table.

Note: Once the document has been successfully trained on the backend, the Chat View button will be enabled. Upon clicking this button, the user will be redirected to the Document View section on a new tab.



11. The Project Summary feature allows users to generate a comprehensive summary of the project. It can include uploaded documents, meeting transcripts, and other relevant information to provide a clear overview.

12. In the Chat View section, the user can view the trained document and interact with a chatbot specifically designed for that document.





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Note: The view button is only for preview the document.

13. Additionally, an Activity History feature has been added to record all actions such as uploads, summary generation, and other interactions, providing users with a transparent and traceable document management process.

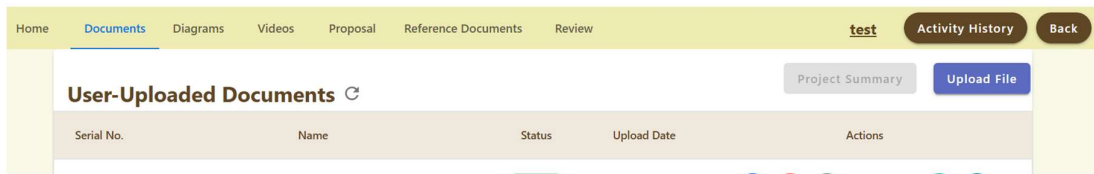
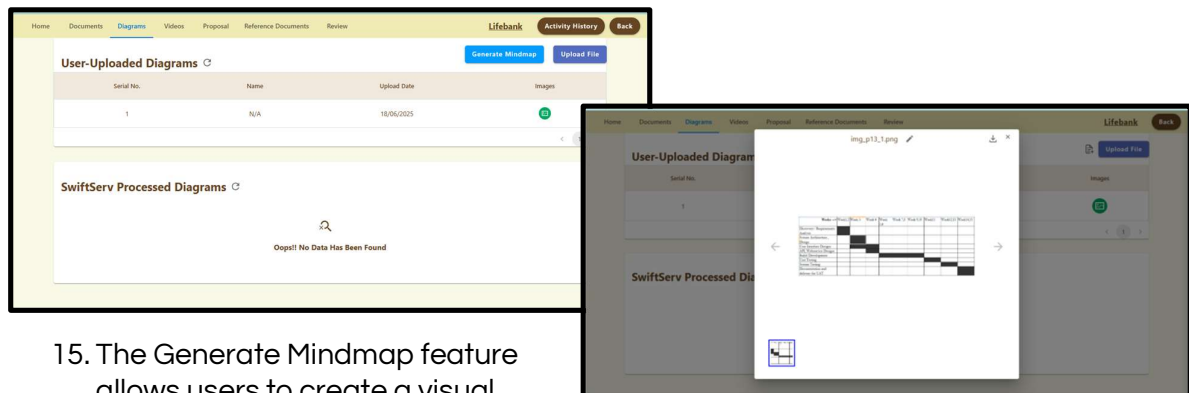


Diagram Section

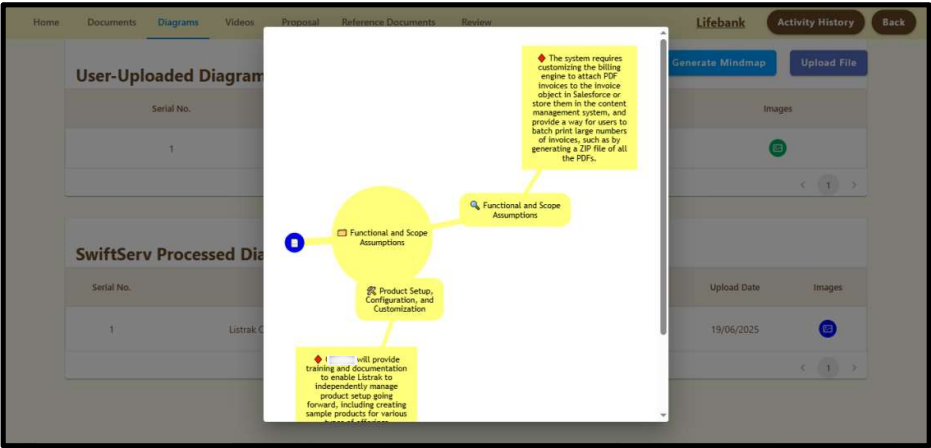
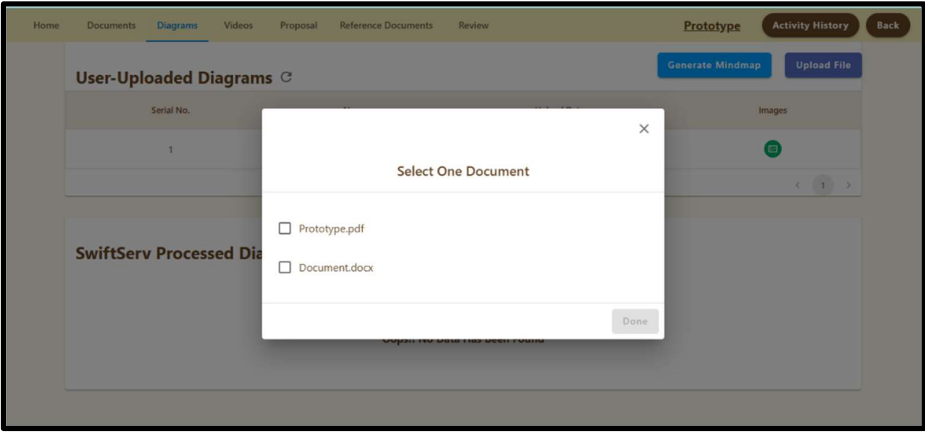
14. In the Diagrams section, users can upload their own diagrams. This section also includes diagrams extracted from the trained documents.



15. The Generate Mindmap feature allows users to create a visual mind map from any uploaded document. This helps in quickly understanding the key concepts and structure of the content.

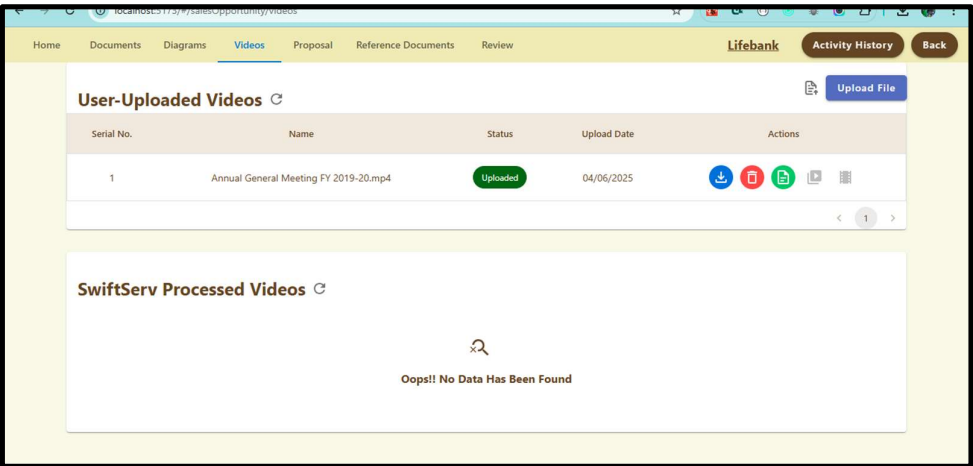


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Video Section:

16. In the Videos section, users can upload videos and generate transcriptions from the uploaded content.



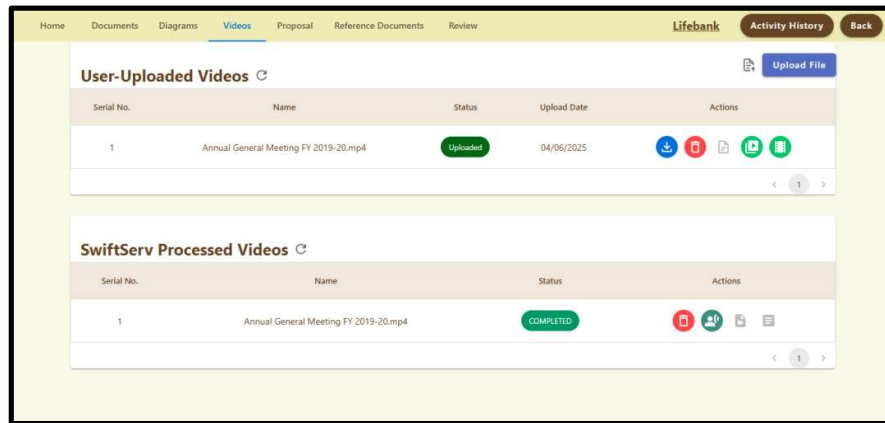
Note:After generating the transcript, users can proceed to generate a Video



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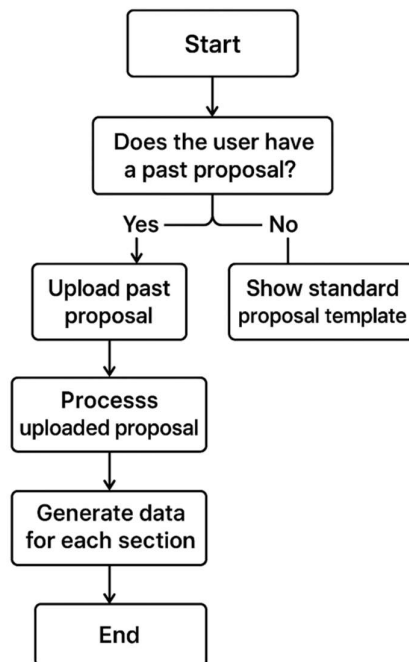
Summary and Minutes of Meeting (MOM) for better understanding and documentation of the discussion.

Proposal Section:



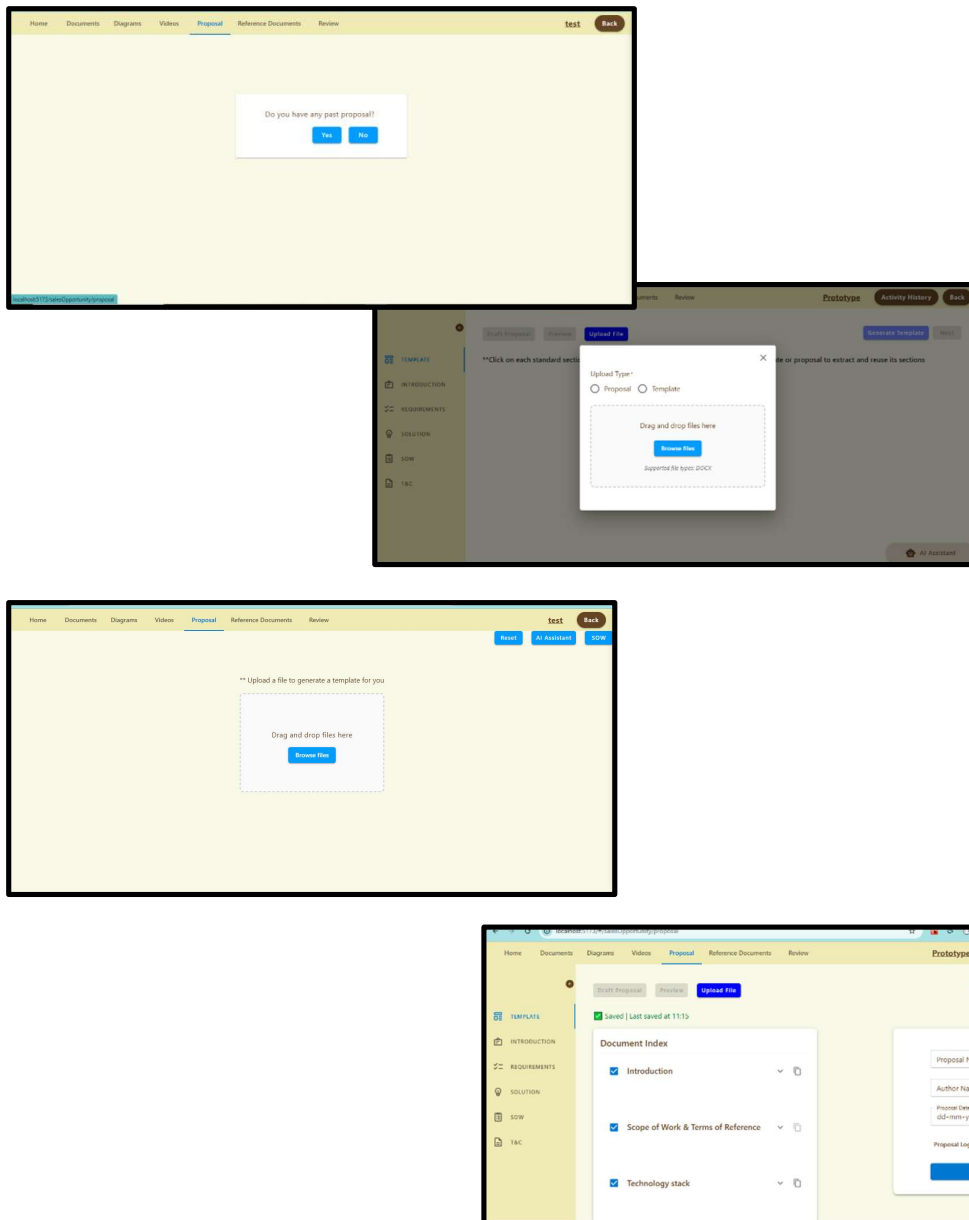
17. In the Proposal section, a proposal is generated based on the content of the RFP (Request for Proposal) document.

For now the flow goes like this :





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Proposal Details

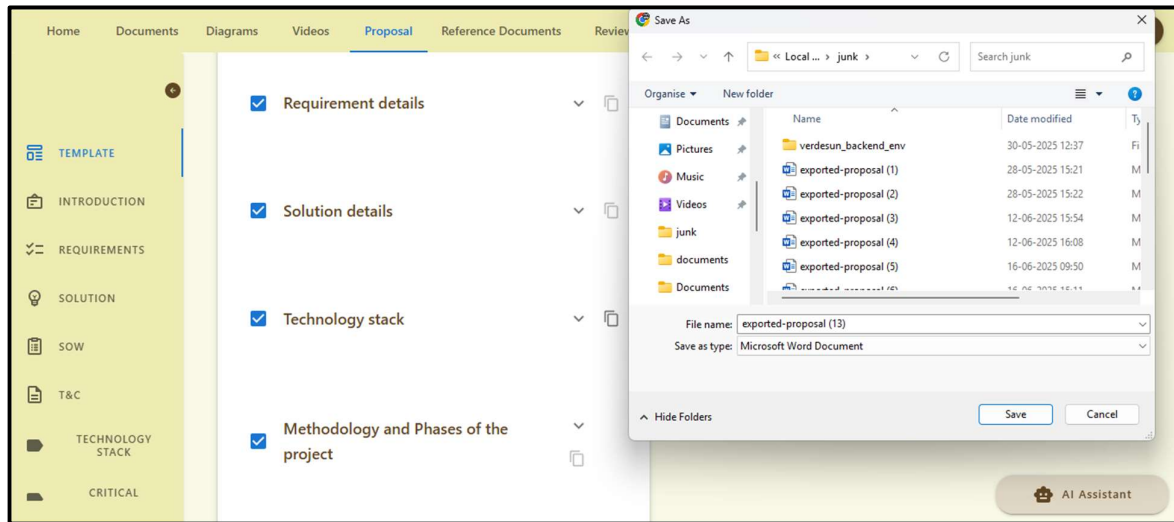
A. Template : In this section firstly, the system need proposal details need to fill all the details then only can move to the other section.

This section consists of 5 buttons, named -

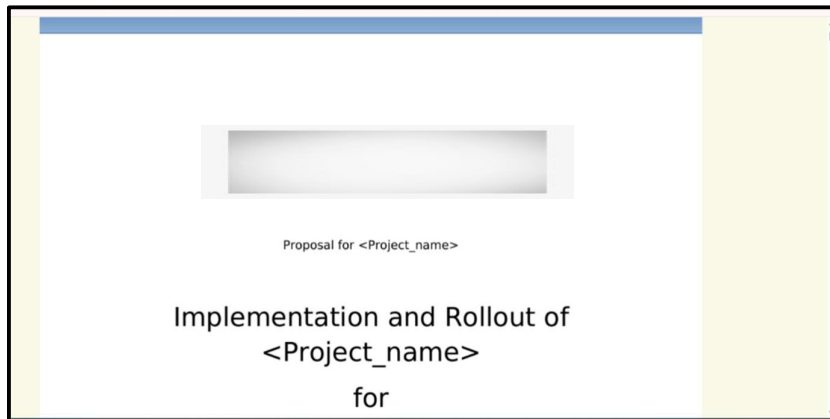
Draft Proposal - Here you can Export the draft Proposal, one docx file will be generated based on your RFP Documents and Previous Proposal documents.



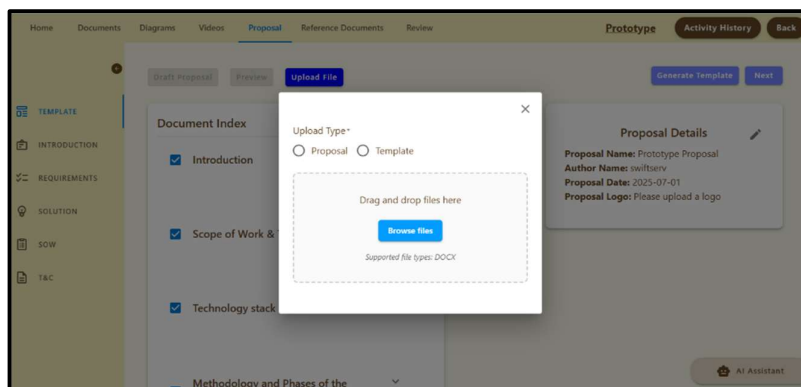
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Preview - You can preview your generated draft Proposal till that .The preview will be opened on one new tab and can view the generated documents.



Upload File - This button is for uploading the proposal or template in which the New document will be generated.





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- C. **Requirements** : In this section can generate the the Requirements from the RFP documents and can Regenerate too. After completing the generation can move to the next part.

- D. **Solution** : In this section , there you can upload solution document and solution diagram . This will be added to the Proposal.



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In the below of this section You can see User Uploaded Solutions one by one . and after that user can download , delete , view , and extracted Text.

Serial No.	Document Name	Document Status	Upload Date	Actions
1	Screenshot from 2025-06-19 14-29-18.png	Uploaded	19/06/2025	
2	SwiftServ-06-05-2025_03_34_PM.png	Uploaded	06/06/2025	
3	Adobe Express - file.png	Uploaded	06/06/2025	
4	SwiftServ-06-05-2025_03_56_PM.png	Uploaded	06/06/2025	

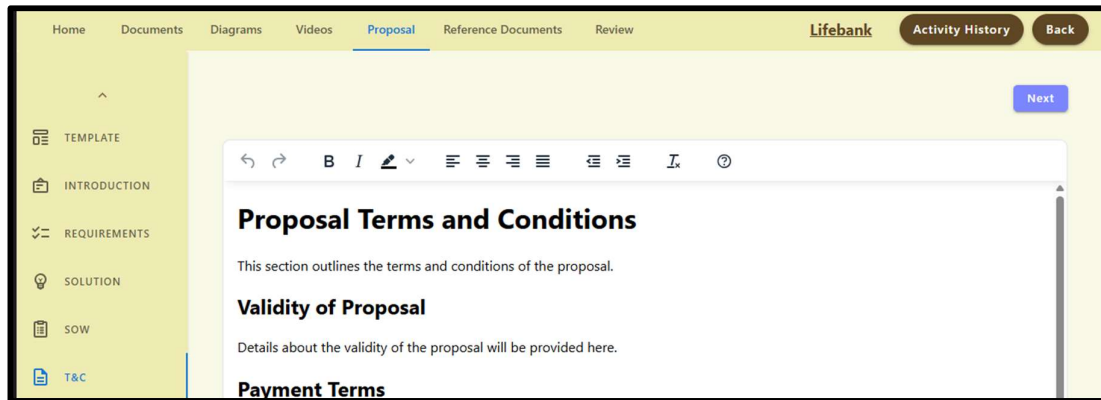
- E. **SOW** : In this section firstly you can copy requirements and select the requirements and generate sow based on the requirements.Also you can regenerate the sow and can move to the next part.

☐	Serial No.	Requirement	Feature	Implementation Steps	Special Notes
☐	1	User Profile setup	- User Profile setup	- Define user roles and permissions - Create user profile fields - Configure user profile settings - Set up user profile access controls - Test user profile functionality	N/A
☐	2	Usage upload – upload usage data provided in Standard Chikpea template	- Usage Upload	- Create a function to parse the Standard Chikpea template - Develop a script to validate the parsed data - Implement a function to upload the validated data to the system	N/A

- F. **T&C** : In this section you can edit terms and condition. this will be added to the proposal documents.

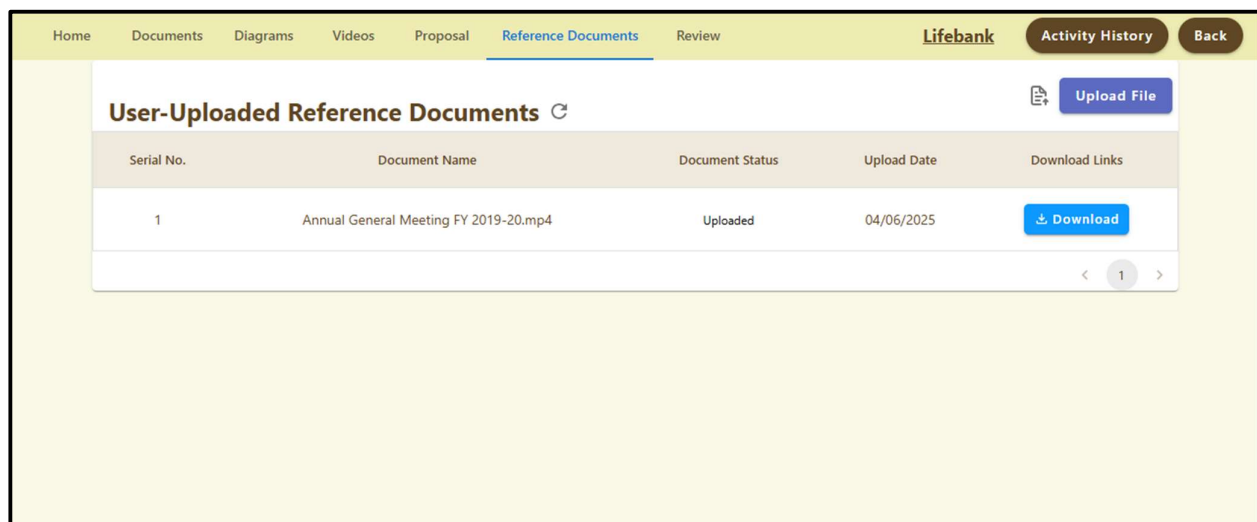


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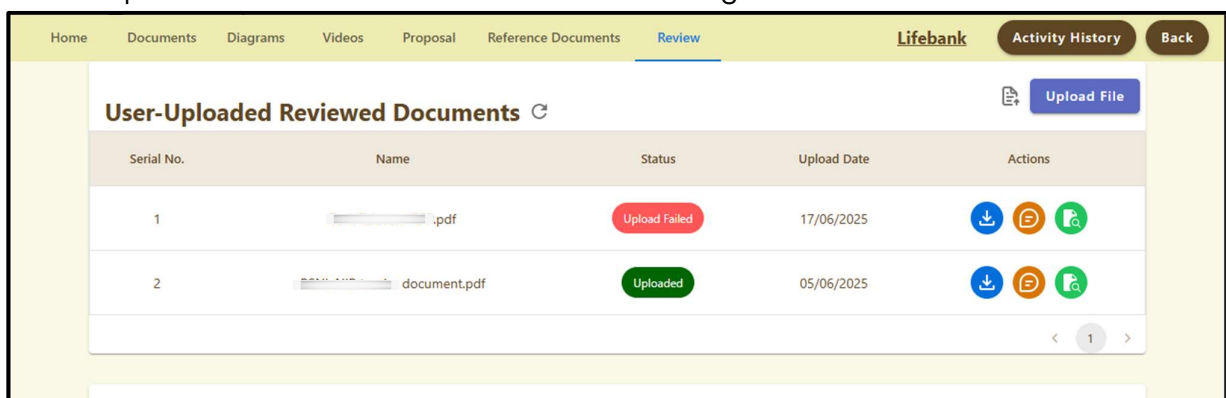
Reference Documents Section:

In the **Reference Documents** section, You can add any type of reference document related to this Sales Opportunity and this will effect the Proposal creation.



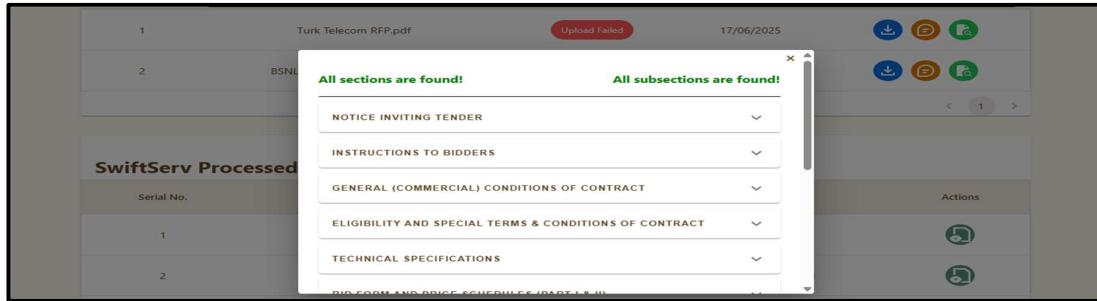
Review Section:

In the **Review** section, You can Review any document by **SwiftServ**. You can upload document and chat with that also can generate the Review

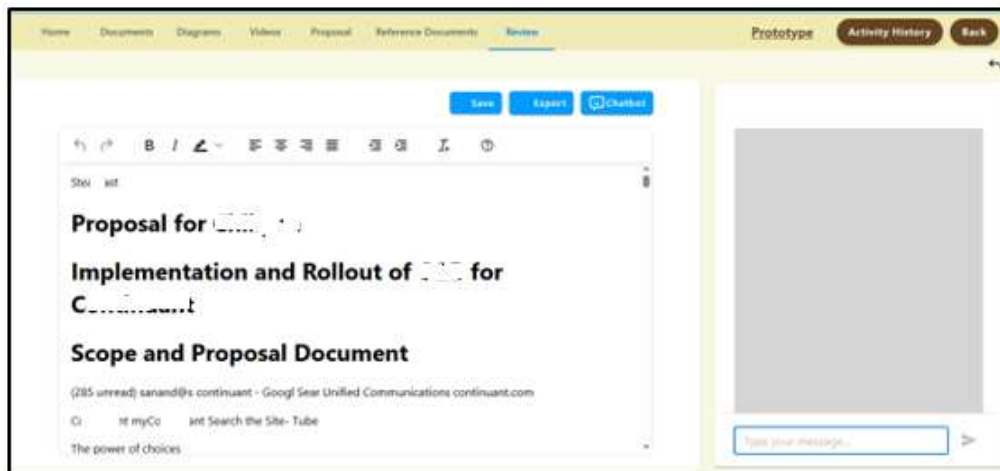




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The **Review** section allows users to upload any document and interact with it using SwiftServ's AI capabilities. It checks whether all required indexes are present in the document and stores the reviewed version in the **SwiftServ Processed Reviewed Documents** table. This feature is primarily used for index verification.





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SwiftServ Deployment

SwiftServ Atlassian App needs to be integrated with the SwiftServ server software which can be hosted in any preferred cloud (like AWS / Azure / Google) or any private other cloud. To complete the integration following steps to be performed at the Server side and Atlassian side.

Third-party Server side –

Serverside api domain - Customer need to share the domain for the confluence UI

Atlassian side –

Admin Setup –

1. **Confluence space domain** - Customer need to create a confluence domain(if not already created) and specify the domain in backend config file
2. **Confluence api key** - Customer need to create an api key from this url (<https://id.atlassian.com/manage-profile/security/api-tokens>) using following scopes

- read:space:confluence
- write:confluence-space
- read:page:confluence
- write:page:confluence
- read:confluence-content.all
- write:confluence-content
- search:confluence

After api key creation, specify the api key with admin email id(registered in the atlassian) in the config file, so that backend can communicate with atlassian.

User Setup –

1. Changing Email Visibility to “Anyone”
Go to the following link:



<https://id.atlassian.com/manage-profile/profile-and-visibility>

In the "Contact" section of your profile:
Locate the "Email address" field.

Currently, the visibility is set to: “Only you and admin” 



Change it to: “Anyone” 

→ This is required so others can access or view your email address publicly when needed.



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Why this change is important: Changing visibility to "Anyone" is necessary for retrieving API details tied to your Atlassian account. Without this, integrations or automated systems may fail to access your account information correctly.

A screenshot of the SwiftServ user profile settings page. The page is divided into several sections: "Organization" with a dropdown menu set to "Anyone", "Based in" with a dropdown menu set to "Anyone", "Local time" with a note "You have not set your time zone yet", and "Contact" with an "Email address" field. A tooltip is visible over the "Anyone" dropdown in the "Contact" section, showing two options: "Anyone" (Visible to anyone who can view your content. Accessible by installed apps.) and "Only you and admins" (Only visible to you and admins. To manage access to Atlassian products and services, admins need to view your email address too.). The "Only you and ad..." option is selected in the dropdown menu.