



Quick Start Guide

A guide for new Jylo users

Version 2.1

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Welcome to Jylo

Jylo is an AI-powered platform that allows you to automate your organisational intelligence. It combines AI capabilities with human expertise, helping you work faster whilst maintaining quality through built-in verification.

The platform offers two core tools—the **Assistant** and **Playbooks**. Assistant is a chat-style AI interface for quick questions, ad-hoc document reviews and redline comparisons. Playbooks are automated workflows that extract, analyse and transform data from your documents into structured outputs such as reports or letters.

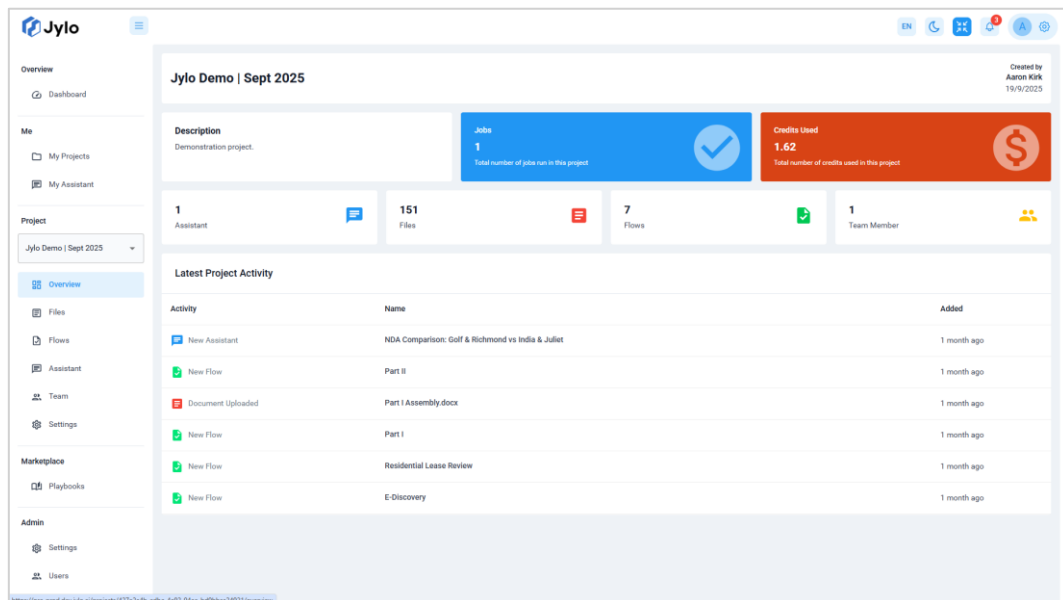
Everything in Jylo happens within **Projects**—organised workspaces that contain your files, analysis, team members and results in one secure location.

Essential Setup

Each Project is typically dedicated to a particular department or initiative. All related files and work are stored and shared amongst individuals chosen to form part of the team.

Create Your First Project

1. Navigate to **My Projects** in the “Me” section of the sidebar
2. Click the **Plus** button in the top-right corner
3. Enter a descriptive Project name
4. Provide a Project description
5. Complete any required metadata fields
6. Click **Finish** to create your Project



Upload Documents

1. Select your Project and navigate to the **Files** section
2. Click the **Plus** button
3. Select “Upload files” from the dropdown

4. Drag and drop files or click **browse** to select from your computer
5. Click **Upload Files** to complete the process

Note

Supported formats: .pdf, .docx, .xlsx, .msg, .eml, .tiff, .tif, .jpg, .jpeg, .png, .txt and .pst files.

Two Ways to Analyse Documents

Choose the approach that best fits your needs:

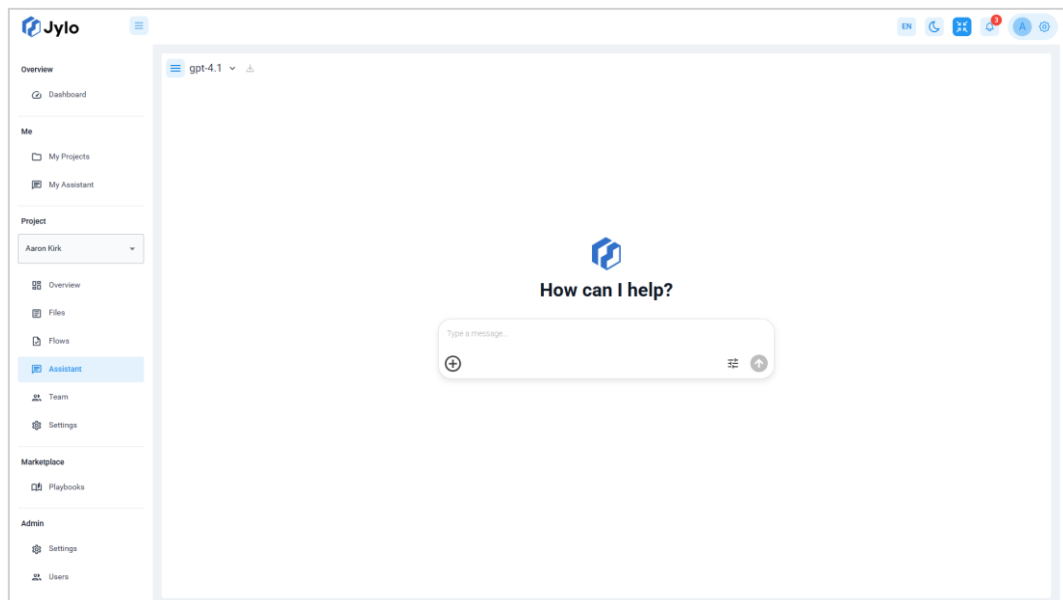
Assistant

Assistant is ideal for quick questions, multi-document analysis and dynamic conversations that develop with every interaction. Use it to:

- Prepare for meetings
- Learn new concepts
- Perform redline analysis
- Compare documents of various types

Note

The Assistant is a powerful aid for ad-hoc tasks. However, you should always verify its outputs before relying on them.



To launch the Assistant:

1. Click **Assistant** in your Project navigation
2. Click the **Plus** button to start a new conversation
3. Upload specific documents using the **Plus** button in the input field, or ask general questions

4. Use natural language queries such as:
 - “Compare the agreement to the issues list”
 - “List the contractual milestones in table format”
 - “Differentiate between completion accounts and the locked box mechanism”
5. Verify responses by clicking citation numbers to see highlighted source text in the original document

Playbooks and Flows

Whilst the Assistant provides rapid clarity for individual queries, Playbooks are the best option for consistently automating larger tasks across one or many documents. These reusable templates enable you to apply high-quality prompts at scale. They are typically used to:

- Spot trends across documents
- Analyse documents using proven methodology
- Structure and organise large datasets
- Identify crucial information quickly from large volumes of data
- Produce bespoke reports for single documents or entire datasets
- Democratise methodology throughout your organisation

Tip

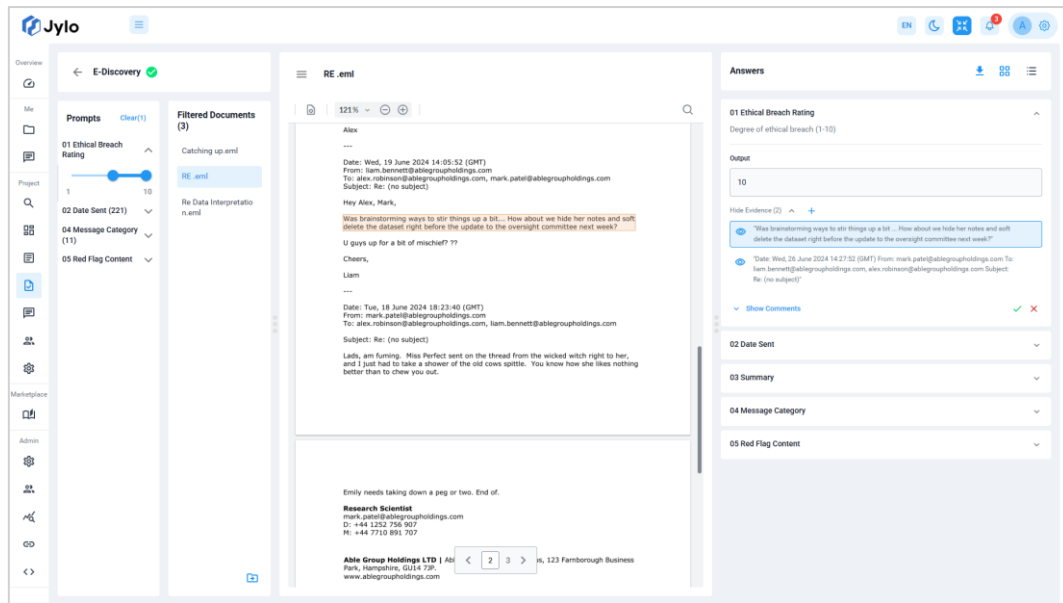
Once you are comfortable using the Assistant, try using a Playbook to automate your most frequent tasks. Playbooks improve output consistency and save time.

To launch a Flow:

1. Navigate to the **Flows** section in your Project
2. Click the **Plus** button and select **Add Flow**
3. Enter a Flow name and description
4. Select your chosen Playbook
5. Select your target documents
6. Click **Finish** to launch the analysis

Once the Flow is complete, review and verify results:

1. Use the left panel filters to find documents matching specific criteria
2. Click **Evidence** buttons to see AI reasoning highlighted in the source document
3. Approve, reject or edit responses using the verification controls
4. Use **Tasks** to assign specialist reviews to team members



Exporting Results

From Assistant

- **Export PDF:** Download the entire conversation thread
- **Export message:** Export any individual message directly to Word, email, Excel or PDF
- **Copy output:** Copy any response to paste elsewhere

From Flows

Click the download icon in the top-right corner to access export options:

- **Export Spreadsheet:** Tabular data including verification status and comments for further analysis
- **Export with source documents:** Complete package including original files
- **Generate Flow Assembly:** A bespoke report comparing all documents based on the Playbook template
- **Generate Document Assembly:** Individual reports for each document based on the Playbook template

Next Steps

- **Add team members:** Navigate to **Team** in your Project to invite colleagues and assign roles
- **Explore Playbooks:** Browse the **Marketplace** to find analysis templates for different document types
- **Create custom workflows:** Once you have identified effective prompts in the Assistant, consider building custom Playbooks for repeated use

For comprehensive guides including the User Guide, Playbook Prompting and Assembly Building, visit our support portal at support.jylo.ai or contact us at support@jylo.ai.

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