Help Guide for Invited Responders

Updated January 2019

RFP 360

Welcome to RFP360

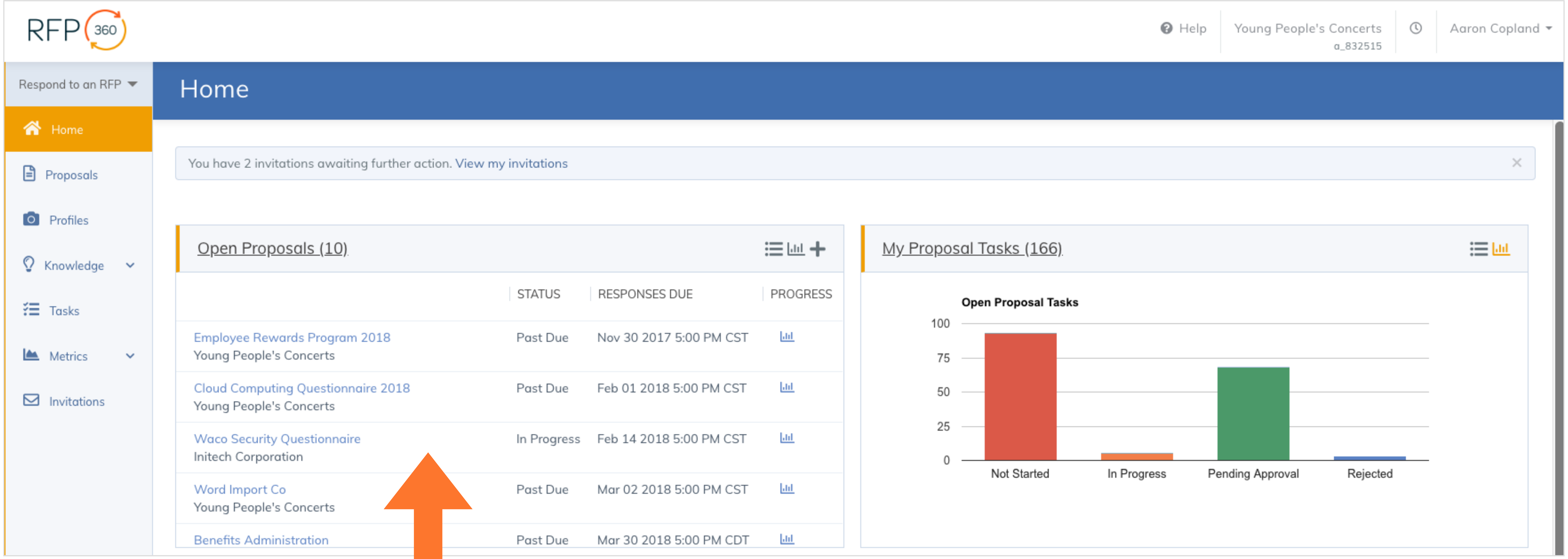
If you do not already have an account with RFP 360, then please follow the prompts provided to set up an account. You will establish a password so you can come back in anytime and work on your RFP response.

After your initial access and setup, you can access the RFP360 platform here. If you forget your password, there are prompts to help you.

If you have any questions, please don't hesitate to contact us at the support number/email below or visit our Help page in the application.

Home Dashboard

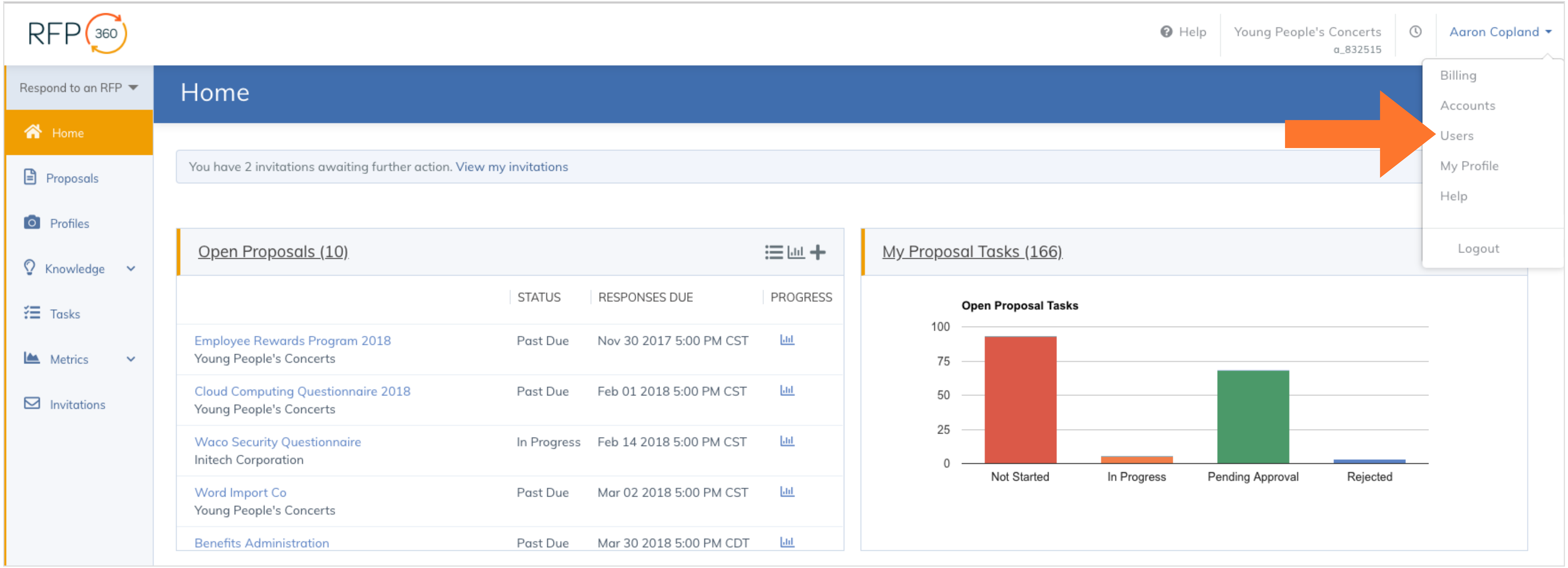
Once you are in RFP360, you’ll be greeted with your Home dashboard.



Proposals are responses to RFPs.
Click the proposal you want to work on.

Inviting Team Members

Invite members of your team in the Users page.
You will be able to assign writing and approving tasks to each user.

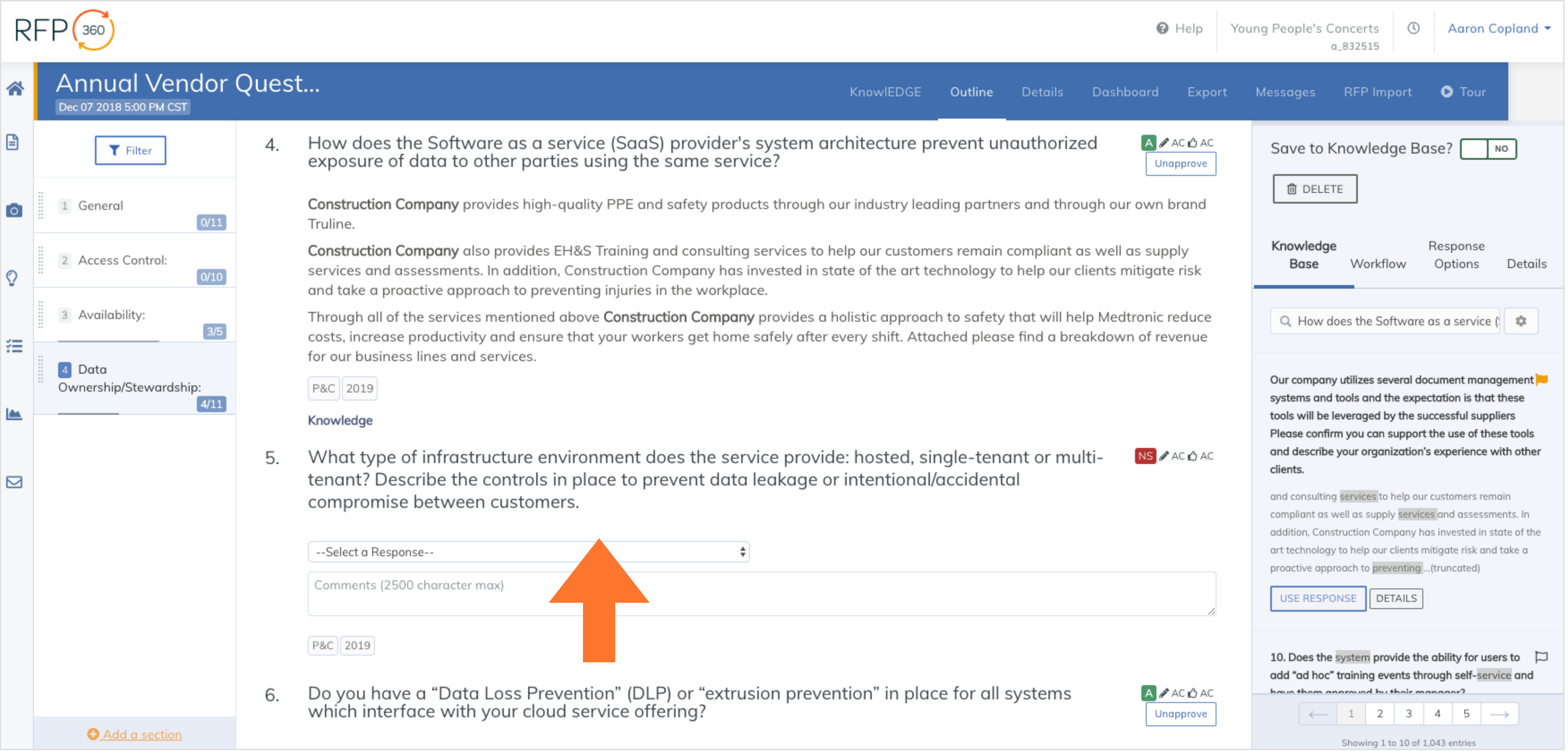


Note: Email notifications and reminders help you manage your team.

RFP 360

Answering Questions

In a proposal, you'll answer questions.
Select from drop-downs or enter text responses.

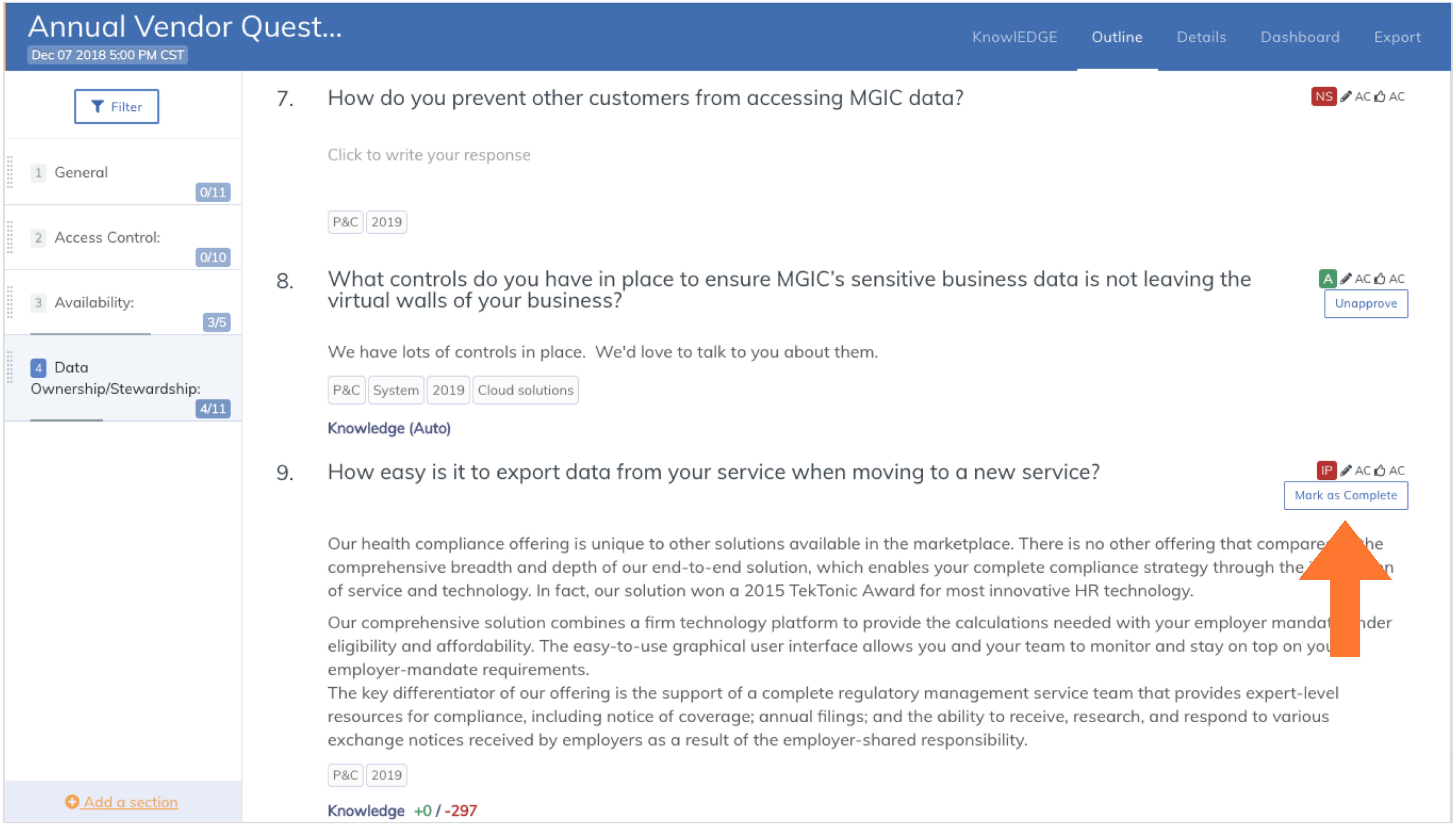


Note: Save your work and come back anytime to work on responses.

RFP 360

Status Indicators

Status indicators help you track progress for your responses.

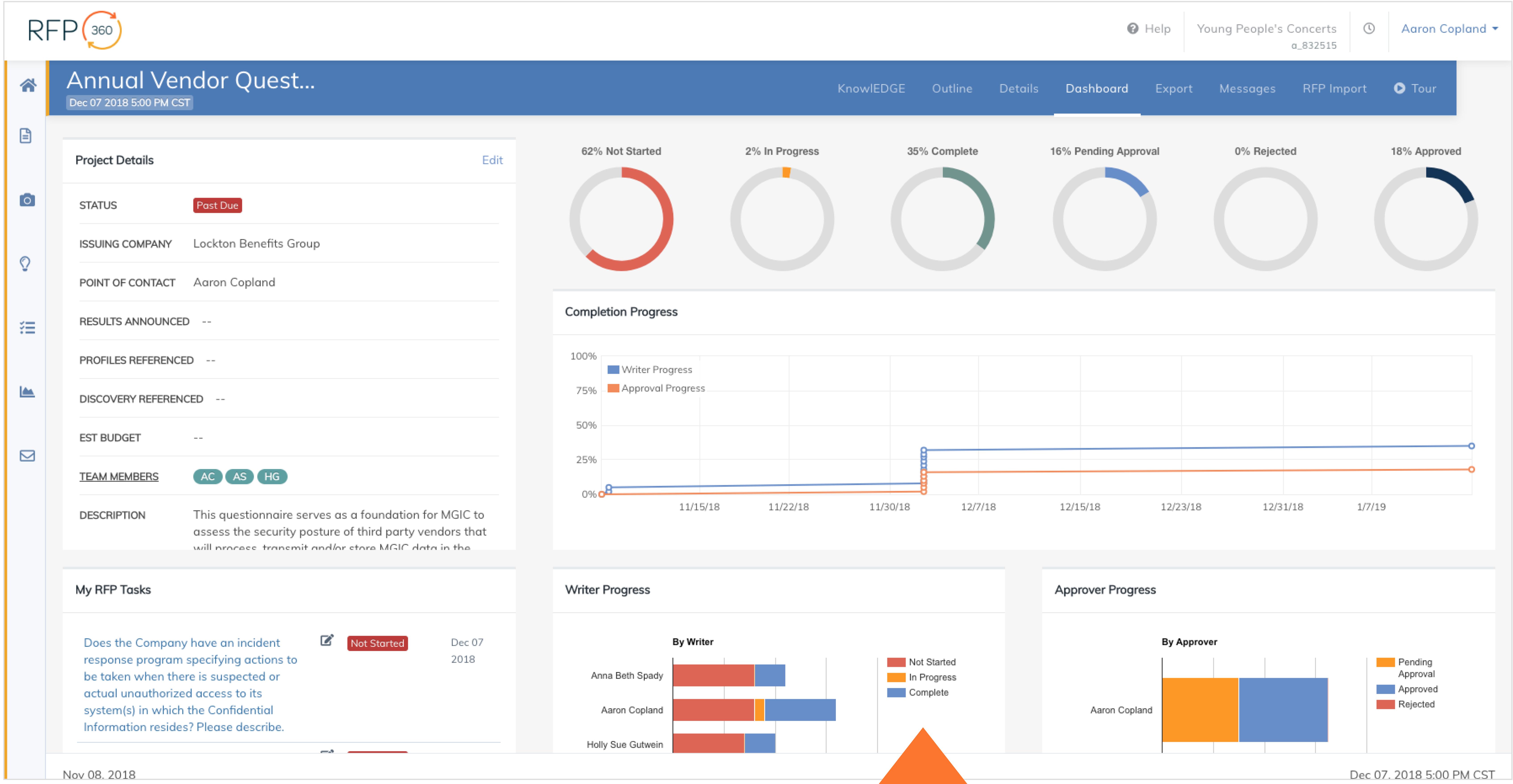


Click the Proposal Dashboard for overall proposal progress.

RFP 360

Proposal Progress

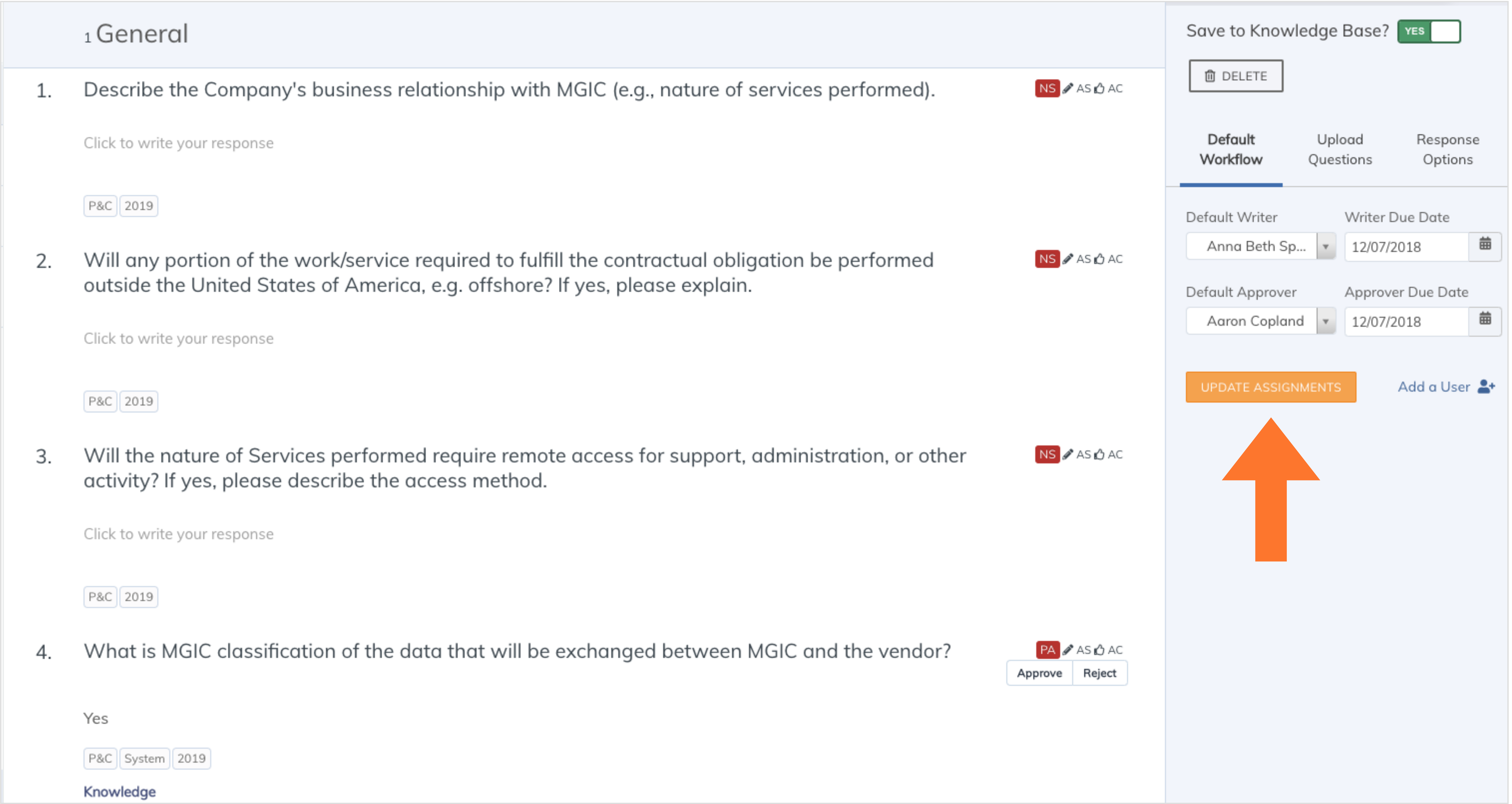
See the writing and approving status of your proposal, by user.



RFP 360

Assigning Questions

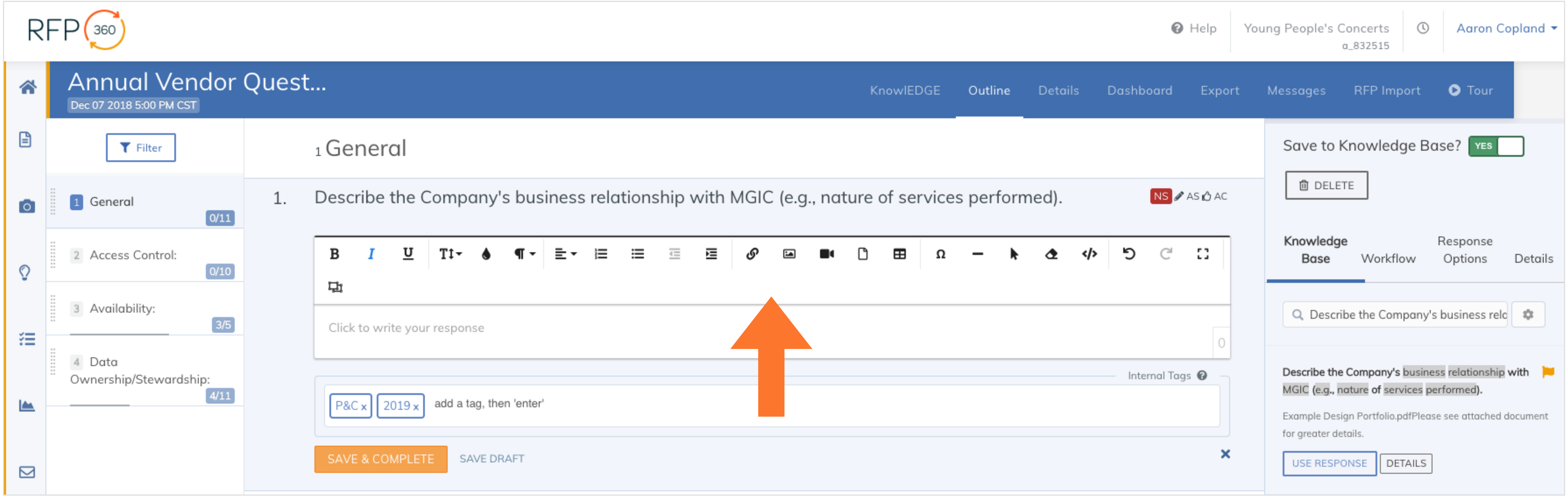
Assign questions to team members and set due dates.



Note: If you click on a section, you can configure task assignments in bulk.

Text Editor

The Text Editor allows you to format your responses, attach files, and embed images, videos, and links

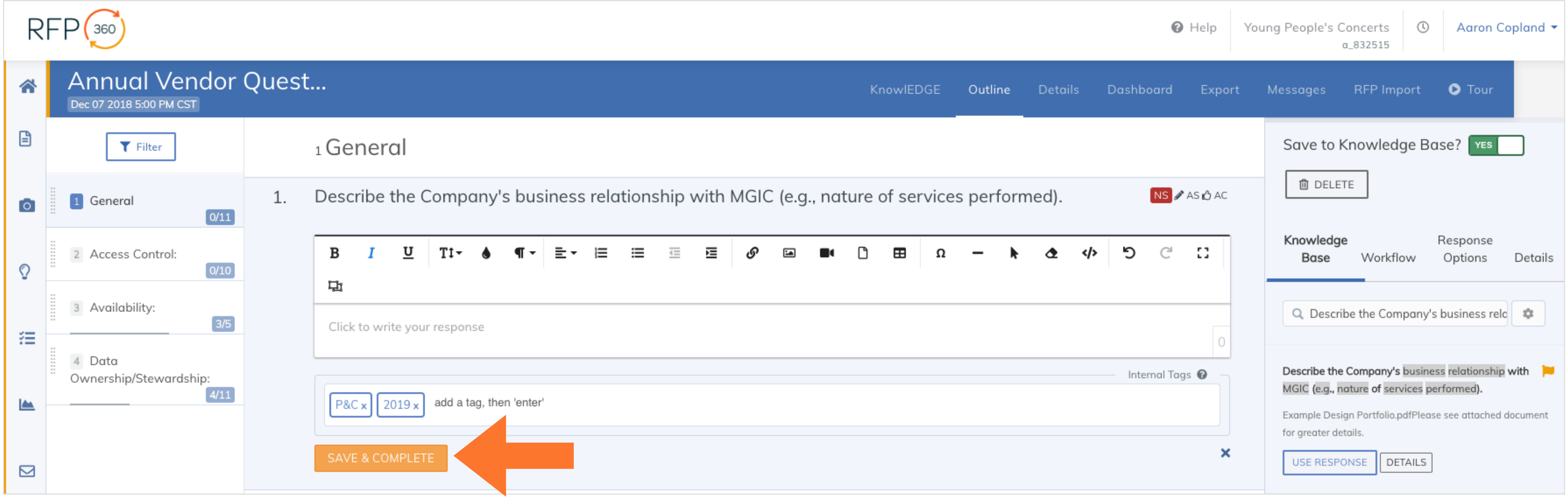


Note: Not all text areas are setup for this rich text response. If your question has drop-down options, the comments are plain text and are limited in characters.

RFP 360

Approving Responses

When a writer supplies their response, they will click on the Save and Complete button to pass the response to the approver.

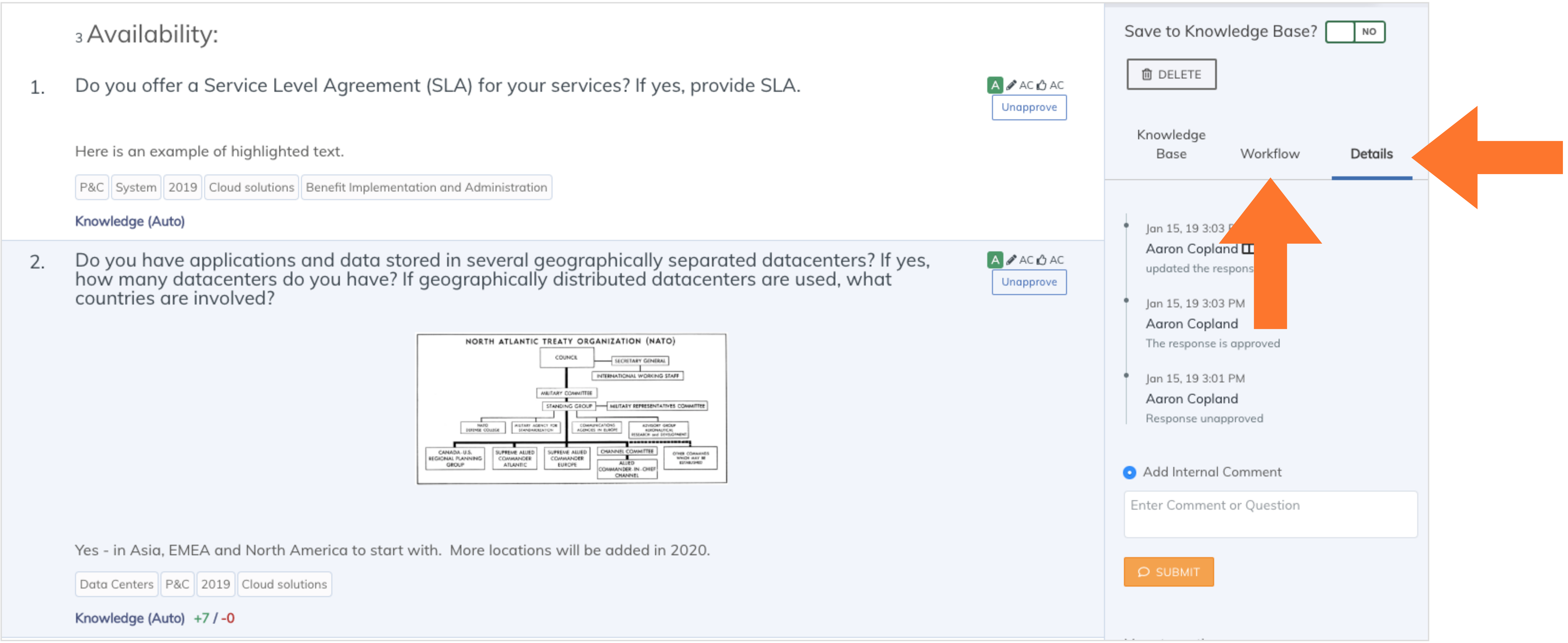


Note: Responses must be complete and approved to be submitted.

RFP 360

Workflow

Workflow lets you configure assignments.
Details show who has worked on what.

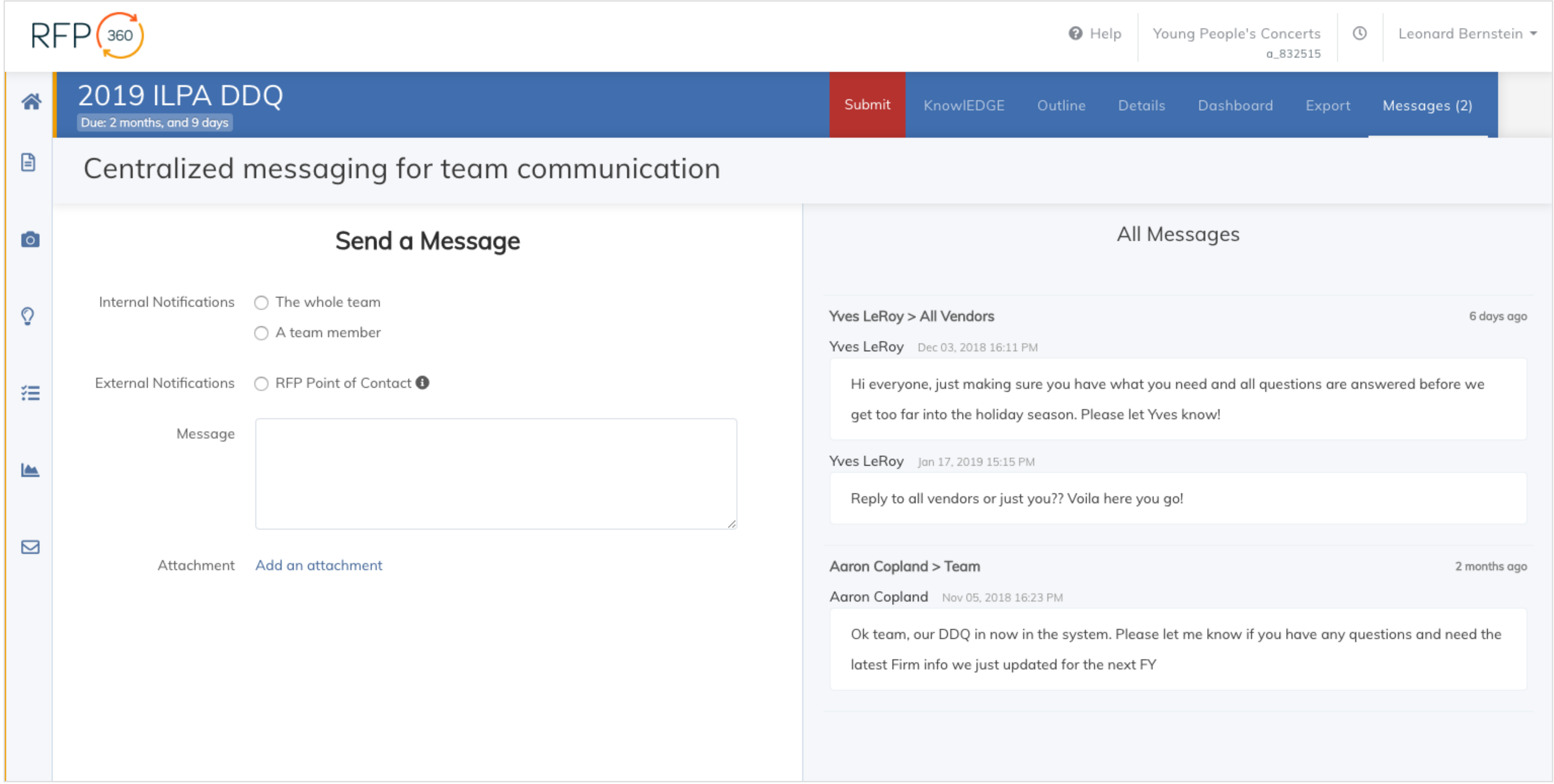


Note: If you've used RFP360 before, you'll have Search Results from your previous proposals. We save your responses in your account.

RFP 360

Messaging

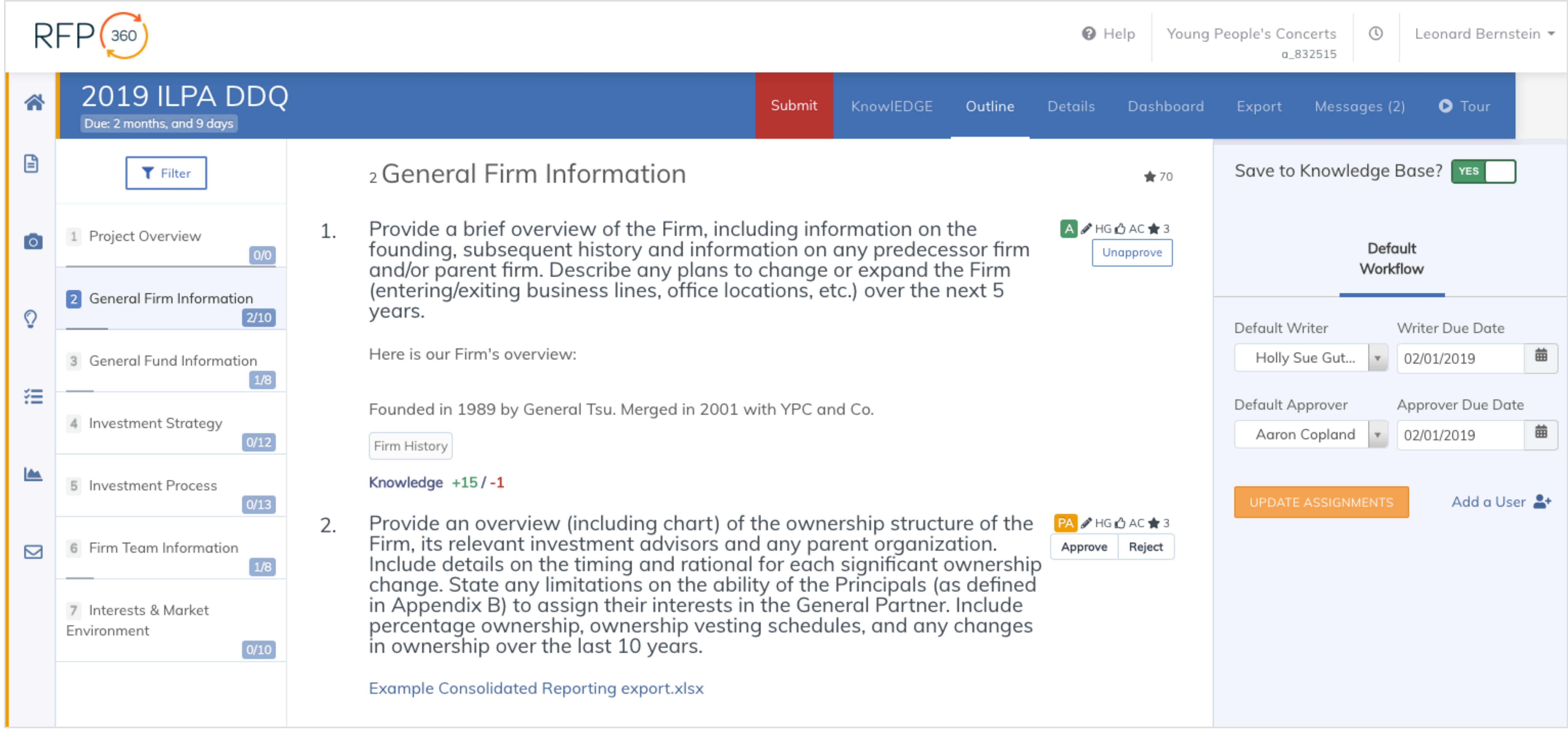
You can send messages to members of your team and questions to the RFP Point of Contact.



Note: Messages also kick off emails to users, so they'll see what you wrote.

Submitting your Proposal

When your responses are Complete and Approved, you can Submit your proposal.



Note: There is a confirmation page and an email to let you know it was submitted successfully.