



# GUEST USER MANUAL

Version 2.0

## **CONFIDENTIAL NOTICE**

This document contains information confidential and proprietary to RFPIO Inc. The information may not be used, disclosed, or reproduced without the prior written authorization of RFPIO Inc. and those so authorized may only use the information for the purpose of evaluation consistent with authorization.

## Contents

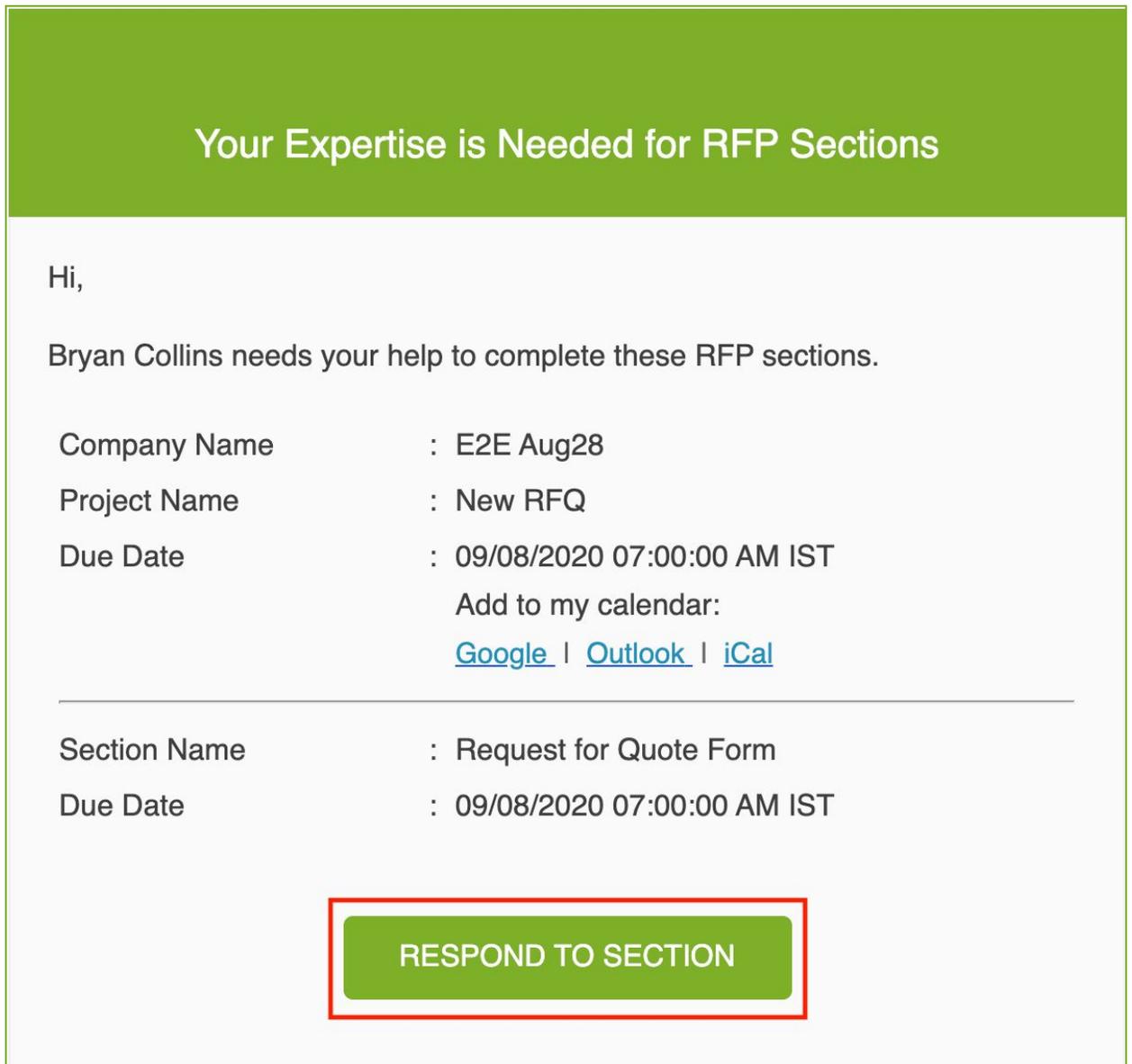
Responding to Project Questions	4
Viewing and Downloading Export Response Packages	7
Viewing Answer Library Questions	9

## Responding to Project Questions

As a guest user, you can respond to project questionnaires when invited. Once a project section is shared with you, you will receive an email notification.

To go to the guest response portal and respond to questions:

1. From the email, click **Respond to Section**.



The screenshot shows an email notification with a green header bar containing the text "Your Expertise is Needed for RFP Sections". Below the header, the email body contains the following text:

Hi,

Bryan Collins needs your help to complete these RFP sections.

Company Name : E2E Aug28  
Project Name : New RFQ  
Due Date : 09/08/2020 07:00:00 AM IST

Add to my calendar:  
[Google](#) | [Outlook](#) | [iCal](#)

---

Section Name : Request for Quote Form  
Due Date : 09/08/2020 07:00:00 AM IST

At the bottom of the email body, there is a green button with the text "RESPOND TO SECTION" highlighted by a red rectangular border.

2. While in the guest portal, you can perform the following actions:

**Respond to questions:** Enter responses to questions. Open text fields allow you to input rich text such as lists, tables, links, images, and font formatting. After each response, the question will be automatically saved.

**Note:** as responses are entered the content will be auto-saved. A notification will appear at the top of the page.

New RFQ  
08/08/2020

Request for Quote Form

1/6 SUBMIT

1.1. Your details:

Name\*  
Bryan Collins  
Words : 2, Characters : 13

Phone Number\*  
1234567890  
Words : 1, Characters : 10

Email\*  
bryan+guest1@rfpio.com  
Words : 1, Characters : 22

2.1. Which is your preferred method of contact?

Response\*

Phone Call  Text  Email

© 2021, RFPIO. All Rights Reserved. Light Help Powered by RFPIO

**Attach files:** Click on the paperclip icon to attach a file to a question or section.

New RFQ 08/08/2020 2/6 SUBMIT

Request for Quote Form

Security

1.What security do you provide?

Response\*

Words : 1, Characters : 0

2.Do you follow GDPR guidelines?

Response\*

Yes, please see the attached document.

Words : 6, Characters : 38

© 2021, RFPIO. All Rights Reserved. Light Help Powered by RFPIO

**Post comments:** Click on the speech bubble icon to post comments on questions or sections.

New RFQ 08/08/2020 3/6 SUBMIT

Request for Quote Form

1.1. Your details:

Name\*

Bryan Collins

Phone Number\*

1234567890

Email\*

bryan+guest1@rfpio.com

2.2. Which is your preferred method of contact?

Response\*

Phone Call  Text  Email

Comments (1)

bryan+guest1@rfpio.com a few seconds ago

Unavailable by phone after 6pm during weekdays.

bryan+guest1@rfpio.com

Enter your reply here

© 2021, RFPIO. All Rights Reserved. Light Help Powered by RFPIO

3. To view additional sections you have been assigned to, click on the **Menu** icon.

New RFQ  
08/08/2020

Sections(2)  
Request for Quote Form (1/4)  
Security (1/2)

Request for Quote Form

1.1. Your details:

Name\*  
Bryan Collins

Phone Number\*  
1234567890

Email\*  
bryan+guest1@rfpio.com

2.2. Which is your preferred method of contact?

Response\*

Phone Call  Text  Email

© 2021, RFPIO. All Rights Reserved. Light Help Powered by RFPIO

4. When finished, click **Submit** to submit your responses and save them within RFPIO.

New RFQ  
08/08/2020

Request for Quote Form

1.1. Your details:

Name\*  
Bryan Collins

Phone Number\*  
1234567890

Email\*  
bryan+guest1@rfpio.com

2.2. Which is your preferred method of contact?

Response\*

Phone Call  Text  Email

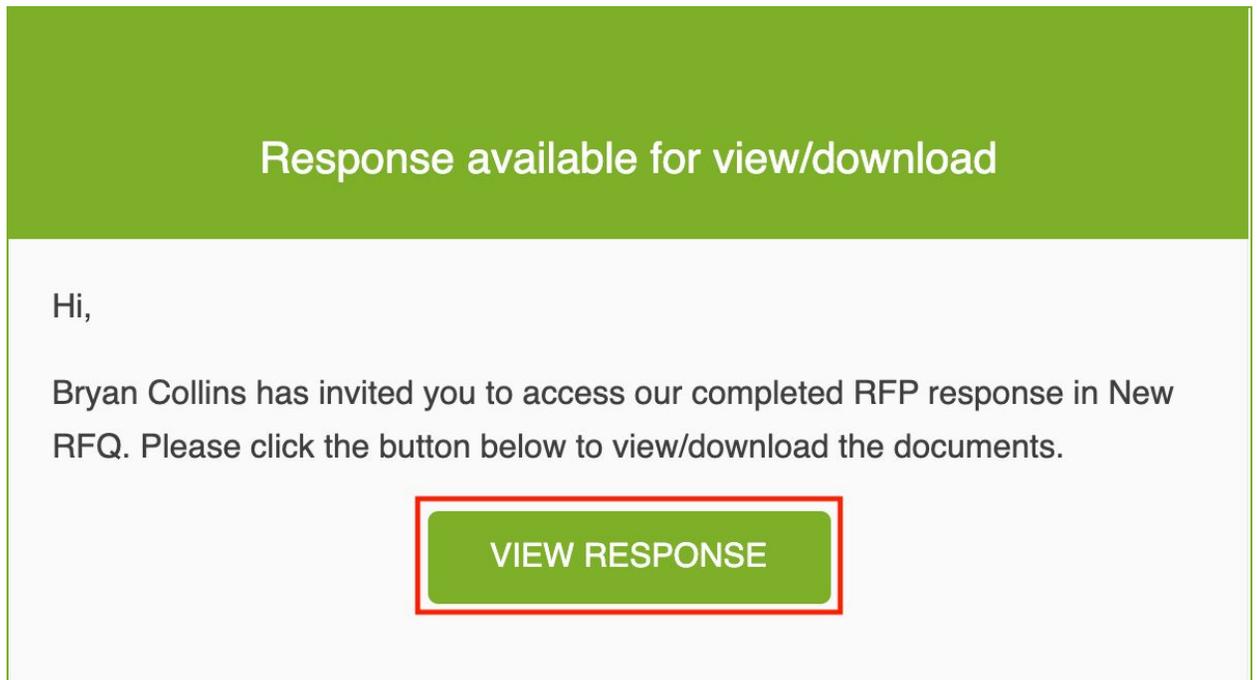
© 2021, RFPIO. All Rights Reserved. Light Help Powered by RFPIO

## Viewing and Downloading Export Response Packages

Upon project completion, the project can be shared with a guest user via an export response package. If an export response package has been shared with you, you will receive an email notification.

To view and download the completed RFx:

1. From the email, click **View Response**.



2. This will take to you a landing page with the project responses. From the landing page, you can only view the responses; modifications cannot be made.

If the project manager has turned on the option to download the export response package, you can click the **Download** button to download the file.

Welcome : bryan+guest1@rfpio.com

### New RFQ

Package Name	Date	Action
New RFQ	14/01/2021 11:15:05 pm	<a href="#">DOWNLOAD</a>

#### 1. REQUEST FOR QUOTE FORM

**1.1. Your details:**  
Name :  
Bryan Collins  
Phone Number :  
1234567890  
Email :  
bryan+guest1@rfpio.com

**2.2. Which is your preferred method of contact?**  
Response :  
 Phone Call  Text  Email

**3.3. If there is a specific date you would like us to contact you, then please specify this below.**  
Response :  
**No, any date is fine.**

**4.4. If you have any comments or queries regarding your quote, then please enter them a below.**  
Response :

DEVELOPMENT

## Viewing Answer Library Questions

Project Managers can also share Answer Library questions with guest users. You will receive an email notification.

To view Answer Library questions that have been shared with you:

1. From the email, click **View Question**.

## Checkout this Answer Library content

Hi,

Bryan Collins needs your assistance in improving the response to the question Edited.

**Question** : Is the information system monitored to detect attacks, potential attacks, and unauthorized use? (This can be done through audit activity in real time, monitoring devices, or applications such as Tripwire or SiteScope.)

[VIEW QUESTION](#)

2. The next page will display the question and answer. Clicking on the user icon will also show the question owners.

Welcome : bryan+guest1@rfpio.com

Answer Library View

Is the information system monitored to detect attacks, potential attacks, and unauthorized use? (This can be done through audit activity in real time, monitoring devices, or applications such as Tripwire or SiteScope.)

★★★★★

[AI\\_Testing\\_Tags](#) [tag](#)

Comment is required

**Comment is required**

Owners

1. [Redacted]@rfpio.com 