New User Training Checklist

RFPIO

Welcome to RFPIO! Get the most out of your RFPIO experience by following the checklist below. Each step includes Help Center articles and Pro Tips to set you up for success. Happy responding!

1. Account Setup

This is completed as a part of onboarding or within a week of starting as a new user

Setup Your Account:

Login to RFPIO
Setup profile (Name, Time Zone, Job Title, Phone Number, Location)
Setup notification preferences
Setup display preferences
Find 'My Work' where your tasks and notifications live
Setup calendar sync to keep track of your tasks

Additional Setup Resources:

Access our Help Center
Contact our support team

2. Introduction to the Answer Library

This is for users who will be searching, reviewing, and using content in the Answer Library

Learn the different ways to leverage the keyword and advanced search in the Answer Library
How to create and implement saved searches
Using content
Learn the different ways the Answer Library can be organized
How to be a content owner and review on a regular basis
How to add content to the Answer Library

3. Introduction to Projects

For users who will be involved in projects in RFPIO

Find your assigned work under the 'My Work' tab
Learn how to respond to the questions you are assigned and utilize the Recommendation Engine
How to collaborate with your team using comments
Learn the importance of the save in Answer Library toggle