

## When to Use

### Site Availability: Dynamic only

The RFP Page Type license includes two page types; the RFP Landing page and the RFP page. When the RFP Landing page is arranged as the parent page of the RFP pages, your site visitors will be able to browse and search your current RFPs from the Landing page.

**IMPORTANT NOTE: The RFP Page Type was recreated as a brand new page type for ACM version 8.6. If you are using a previous iteration of the RFP Page Type, please contact [ACMSupport@active.com](mailto:ACMSupport@active.com) prior to upgrading. Your existing RFPs will need to be migrated to the new page type.**

The RFP Pages allow you to publish and protect your RFP documentation by forcing potential bidders to create an account and login in order to access the documents. Once logged in, all bidder information is tracked so that activity and document views are recorded and auditable. An email manager allows you to automatically notify all of your potential bidders of changes to the RFP.

An RFP Question has been added to the application form page type and should be used when creating an application form for the creation of potential bidder accounts. The RFP Page Type uses the information collected by the RFP question to collect information on potential bidders.

The RFP Page type can also be used with Public Users. Public Users are new to ACM 8.6 and allow you to create users that will have no access to the ACM system but can be given access to RFP documents or personalized sections of your website. See the Public Users white paper for more details on configuring public users.

### Examples of when to use

- ▶ Use the RFP Page Type when you would like to open bidding for the provision of products or services for your municipality or organization. Publish highlighted details of the RFP, attach documents, track document downloads and send update notifications to your potential bidders.

## RFP LANDING PAGE

## Page Sections & Fields

Page Section	Field Name/Item	Description of usage
Simple Search Section	Show Keyword Search	Selecting this box will display the "Keyword Search" box on the RFP landing page. Keyword search will search all fields of the RFP child pages except for the date fields.
	Show Status Filter	Selecting this box will include a dropdown box containing the different statuses for RFPs. This will be used in conjunction with the keyword search.
	Default	The value selected in this field defines the default selection of the Status Filter in view mode.

Page Section	Field Name/Item	Description of usage
	Show link to Advanced Search	Selecting this checkbox will display a hyperlink to an advanced search screen.
Advanced Search Section	Show Criteria Fields	<p>Use this section to choose which criteria fields you wish to be displayed in the advanced search screen. Criteria fields include:</p> <ul style="list-style-type: none"> <li>- Keyword</li> <li>- Solicitation Number</li> <li>- Status</li> <li>- Publish Date</li> <li>- Title</li> <li>- Close Date</li> <li>- Type</li> <li>- Close Location</li> </ul>
Search Results Section	Results per page	This numeric value represents how many search results must be returned per page. If more results are returned than the number in this field, the results will be paginated.
	Order by	Use this field to define the order in which the search results are to be displayed in view mode. Choose also to display in descending or ascending order.
	Show Details in Search Result	Use this section to choose what details to display in the search results. Title is automatically included as it is the link to the RFP itself.
RFP Listing Section	Show RFP Listing on Landing Page	Check this box to display a listing of RFPs on the landing page.
	Order by	Use this field to define the order in which the RFPs are to be listed in view mode. Choose also to display in descending or ascending order.
	Show	<p>Use this setting to define what RFPs should be listed on the landing page. There are two options:</p> <p><b>All</b> - List all RFPs on the landing page</p> <p><b>Top</b> - List the top X RFPs on the landing page. This field is used along with the Order By field to determine what RFPs are listed.</p>
	Group by Status	Use this checkbox to group your listed RFPs by category.
Description	HTML Editor	Content in the HTML editor will be displayed at the top of the page, above both the simple search and the RFP listing.

## Page Tips!

- ▶ If you don't have a lot of RFPs, exclude the simple search and simply list all of your RFPs on the RFP landing page by enabling the "Show RFP Listing on Landing Page" checkbox and disabling the "Show Keyword Search" checkbox. Doing this will let your potential bidders get to the RFPs more quickly.

## RFP PAGE

### Page Sections & Fields

Page Section	Field Name/Item	Description of usage
Login Section	Login Page	RFP documents are protected and require a potential bidder to log in to access them. Select the Login page you wish to direct potential bidders to when they attempt to access RFP documentation. Should the potential bidders not have an account, a link to an application form should be included on the login form.
Bid Information Section	Section Title	Customize the text of the section title displayed in view mode.
	Type	Define the type of RFP for the current page. (Ex. RFP, RFQ, etc.)
	Solicitation Number	If your organization numbers RFPs, enter the RFP number in this field.
	Publish Date	This is an informational only field that is auto populated with the current date by default. If you wish to open bidding at a future date, yet still publish the page today, put the future date in this field.
	Close Date	Enter the date and time the bidding for this RFP closes. When the date and time is reached, the RFP status will automatically changed to "closed".
	Close Location	Enter the location the RFP will be closed.
	Status	Choose the Status of the RFP. By default, the status will be set to "open" when a new RFP is created. The status will be updated to "closed" when the close date

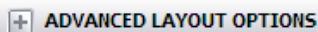
Page Section	Field Name/Item	Description of usage
		and time is reached. All other statuses must be manually set.
	Closed Message	Customize the message to be displayed at the top of the page in view mode when the RFP status is anything but "open".
	Bid Winner	Enter the company name of the bid winner if you choose to display this information.
	Contract Value	Enter the value of the winning bid if you choose to display this information.
Documents Section	Section Title	Customize the text of the section title displayed in view mode.
	Documents Grid	<p>RFP documents can be added to the documents grid. All documents added prior to the initial publication of the page will be classified as Original and all documents added after the initial publication will be classified as Addenda.</p> <p>In order to protect the integrity of the RFP process, the assets attached to the RFP will not be updated if the asset itself is updated in the Digital Asset Manager. This is to prevent a potential bidder from missing pertinent information in a document they thought they had already downloaded.</p> <p>All changes to RFP documentation should be added as addendums to the original documents.</p>
Description	HTML Editor	Content in the HTML editor will be displayed at the top of the page, and is meant to provide a brief description of the RFP.
Pertinent Questions and Responses	Section Title	Customize the text of the section title displayed in view mode.
	Allow Question Submission	Check this box to allow potential bidders to submit questions about the RFP from the RFP page. Clicking the "Ask a Question" link in view mode will ask the potential bidder to log in.
	Send Questions To	Enter the email address of your procurement manager so that questions submitted on the RFP page will be directed to them via email.

Page Section	Field Name/Item	Description of usage
	Question Grid	Questions and responses can be manually added to this grid and displayed in view mode. Questions submitted by a potential bidder from view mode will also populate this grid and the page administrator can answer the question and publish both the question and response in view mode.
Contact Information	Section Title	Customize the text of the section title displayed in view mode.
	Contact Grid	Add any number of contacts to your RFP page.
Email Manager	<b>Subscribing</b>	Potential bidders will be automatically subscribed for email notifications when they log in to an RFP page. You can manually subscribe and unsubscribe a potential bidder in the Bidder List section.
	Automatically Send Email when Addenda are added	Check this box to send an email notification to all potential bidders when an addendum is added to the RFP page.
	Automatically send Email when RFP status is changed	Check this box to send an email notification to all potential bidders when the Status of the RFP is changed.
	Automatically send Email when Question/Response is published	Check this box to send an email notification to all potential bidders when a new question and response are published.
	Show Unsubscribe Link in View Mode	Check this box to allow
Bidder List	Section Title	Customize the text of the section title displayed in view mode.
	Publish Bidder List (Company Only)	Check this box to show a list of all current bidders for the RFP. Only the company name of the bidder will be displayed and only if the "Bid Submitted" checkbox is manually selected in the Bidder Grid for that bidder.
	Export List	Click this button to export the current bidder grid to an Excel spreadsheet.
	Bidder Grid	The bidder grid displays a list of all potential bidders that have logged in to the RFP page to view or download the documentation. You can use the "Bid Submitted" checkbox to flag which of the bidders have

Page Section	Field Name/Item	Description of usage
		actually submitted a bid. Click on the name in the bidder grid to view the activity of the potential bidder in relation to this RFP.
Bidder Details	Modal Dialog	The bidder details window opens when you select the name of a potential bidder from the bidder list. The bidder details shows the information of the bidder plus the initial login date and the date and time that each RFP document was downloaded or viewed. These details can be exported to an Excel file.

## Advanced Layout Options

There is an additional section at the bottom of the Page Editor titled **Advanced Layout Options**. This section provides additional layout options for RFP pages. Click the plus sign to expand the window and view the tags and HTML currently used to layout the page.



The Advanced Layout Options include an HTML editor window that contains default code for the RFP Layout. This code can be edited to remove unwanted sections, or to alter the layout of the various RFP sections.

## Advanced Layout Tags

The Advanced Layout Tags follow the standard ACM tag format: `<ironpoint>TagName</ironpoint>`

Tag Name	Tag Function
RFPBidInformation	Represents the bid information section.
RFPDocuments	Represents the documents section.
RFPDescription	Represents the description section.
RFPQuestionResponse	Represents the pertinent questions and responses section.
RFPContactInformation	Represents the contact information section.
RFPBidderList	Represents the bidder list when it is published.

## Page Tips!

- ▶ Create your login page and application form prior to creating the RFP Landing or RFP pages so that you can easily link to them when creating RFP Pages.