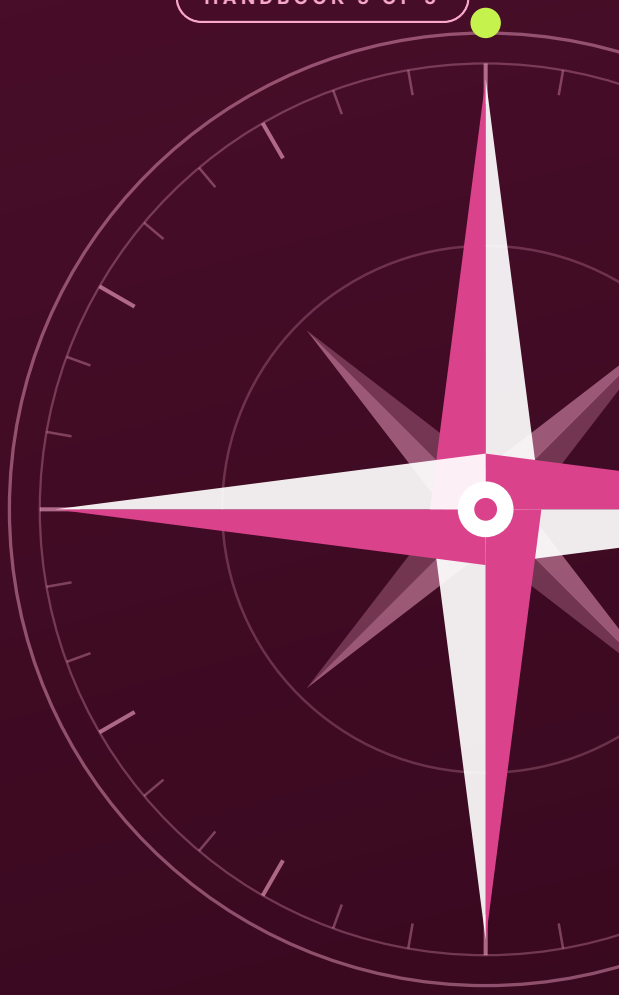
RFP Detector

HANDBOOK 5 OF 5



THE RFP DETECTOR HANDBOOKS

How to Use RFP Detector: The Complete Tutorial

A hands-on, screen-by-screen tutorial for vendors, consultants, nonprofits and buyers: account setup, search and scores, bid tracking and alerts, your vendor profile, contractor research and posting RFPs.

7 chapters | Beginner | About 105 min read | 2026 edition

RFP Detector

How to Use RFP Detector: The Complete Tutorial

Handbook 5 of 5 in the RFP Detector handbook series

EDITION	LAST UPDATED	SERIES
November 2026 edition	November 13, 2026	Handbook 5 of 5

READ ONLINE rfpdetector.com/guides/how-to-use-rfp-detector

⚠ General information, not legal advice

This handbook is general information for businesses, consultants and nonprofits. It is not legal, tax, financial or bidding advice. Registration, certification, bonding and procurement rules change and vary by agency and jurisdiction. Confirm current requirements with the buying agency or a qualified advisor before you rely on them.

RFP Detector is an independent service and is not affiliated with any government agency. Scores are informational.

HOW TO USE THIS HANDBOOK

TIP
A quicker or smarter way to do something.

PRO TIP
What experienced bidders do differently.

NOTE
Context worth knowing before you act.

WARNING
A rule, deadline or risk to check carefully.

COMMON MISTAKE
An error that costs bidders points or eligibility.

EXAMPLE
A realistic sample you can adapt.

- Checklists print with empty boxes, and templates print in a bordered form with every [PLACEHOLDER] highlighted and explained.
- Section numbers (3.2 is chapter 3, section 2) match the contents and the PDF bookmarks.
- Links in this PDF open the matching page on rfpdetector.com, where every chapter is kept up to date.

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BEFORE YOU BEGIN

Foreword

RFP Detector does three jobs for the businesses and buyers who use it: it finds and scores RFPs across every sector, it keeps your bids on track from first look to final outcome, and it connects vendors with the buyers who need them. Every one of those jobs works better when you know where things are and what the numbers mean. This handbook is the complete tutorial. It follows the real screens, uses the real button and field names, and explains how to work as well as where to click, so you spend your time on proposals instead of hunting for deadlines. It is free to read, like the core of RFP Detector itself: search, saved RFPs, alerts, the vendor listing and posting RFPs cost nothing.

TABLE **Start here**

If you are	Read first	Then
New to RFP Detector	**Chapter 1, Getting started**	Chapters 2 and 3, in order
A vendor or consultant looking for work	**Chapter 2, Searching RFPs and reading scores**	**Chapter 3** for tracking, **chapter 5** for competitor research
A firm that wants buyers to find it	**Chapter 4, Building a vendor profile**	**Chapter 3** for managing leads in the inbox
A buyer posting an RFP	**Chapter 6, Posting RFPs and finding vendors**	**Chapter 4** to see what vendor profiles contain
The person who runs the account	**Chapter 7, Account security, teams and settings**	**Chapter 1** for workspaces and roles

How the tutorial fits together

01 **Set up**
Account, verification, workspaces

02 **Find**
Search, filters, scores, reports

03 **Track**
Pipeline, calendar, alerts

04 **Get found**
Vendor profile and directory

05 **Research and buy**
Contractors, competitors, posting RFPs

06 **Secure**
Devices, team roles, settings

TIP How to use this handbook

Keep RFP Detector open in a second tab and follow along: every **bold** label in these chapters matches a button, tab or field in the app. Each task has numbered steps, and each chapter ends with answers to the questions people ask most. If you don't have an account yet, **create one free** or start by **searching open RFPs** without signing in.

NOTE Scores inform; you decide

The RFP Detector Score and Fit help you decide what to read first. They are informational, are not your probability of winning, and are not advice to bid or not bid. Always confirm dates and requirements on the official solicitation. The **score methodology** explains exactly how scores are calculated.

WHAT YOU WILL LEARN

- Create and verify your account, set up your organization and choose the Vendor and Buyer workspaces you need
- Search RFPs with every filter and read the RFP Detector Score, your Fit score and the free RFP report with confidence
- Run your bids from Saved to a decision on the pipeline board, with owners, internal due dates, a calendar feed and alerts
- Publish a complete, free vendor profile that buyers can find, and measure who views and contacts you
- Research contractors and incumbents, post RFPs as a buyer, and keep your account and team secure

WHO IT IS FOR
New and existing RFP Detector users: small and mid-sized businesses, consultants and nonprofits looking for RFPs, vendors who want buyers to find them, and public or private buyers posting RFPs

LEVEL
Beginner

CHAPTERS
7 chapters, about 105 minutes of reading

Every chapter is also published online and kept current:
rfpdetector.com/guides/how-to-use-rfp-detector

01

CHAPTER 1

Getting Started with RFP Detector: Account, Verification and Workspaces

Everything you need for your first thirty minutes on RFP Detector: sign-up, email and SMS verification, the three onboarding steps, how organizations and workspaces work, a tour of the dashboard, and your first search, save and alert.

16 min read · 9 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- Sign-up has three short steps (**Account**, **Verify email**, **Verify mobile**). Codes are six digits and expire after 10 minutes.
- Every account is verified by email *and* a US or Canadian mobile number, so the vendors and buyers you meet on RFP Detector are real people.
- Onboarding asks for your organization, the workspaces you want (Find RFPs is always on; Vendor and Buyer are optional and free) and optional interests that create your first daily alert.
- Your pipeline, inbox, alerts and listing belong to an **organization**. You can belong to several and switch between them from the account menu.
- Finish the dashboard's **Get started** checklist in your first session: create an alert, save an RFP, turn on a workspace and invite a teammate.

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1.1 Getting started with RFP Detector: what to have ready 10
1.2 How to create your RFP Detector account 10
1.3 Verifying your email and mobile number 12
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Getting started with RFP Detector takes about ten minutes, and most of that is deciding what you want the platform to do for you. This chapter walks through every screen you meet on day one: creating your account, verifying your email and mobile number, the three onboarding steps, how organizations and workspaces fit together, a tour of the dashboard, and the first search, save and alert that turn RFP Detector from a website into a system that watches the market for you.

> **NOTE** **Where this chapter fits**
>
> This is chapter 1 of the hands-on tutorial. Once your account is set up, continue with **Searching RFPs and reading RFP Detector scores**, then **Tracking bids with your pipeline and alerts**. If you are new to public contracting, read **Understanding the government contracting market** alongside it.

SECTION 1.1

Getting started with RFP Detector: what to have ready

You can browse RFPs and download RFP reports without an account. You need one to save RFPs, run a pipeline, get alerts, see your **Fit** score, message organizations, list your company or post RFPs. Gather these first so you finish in one sitting.

Have these ready before you start CHECKLIST · 6 ITEMS

- [ ] A **work email** you check every day. Alerts, deadline reminders and verification codes go here.
- [ ] A **mobile phone** with a US or Canadian number that can receive text messages (not a landline or an internet-only number that blocks short codes).
- [ ] A **password** of at least 10 characters that you don't use anywhere else. Common passwords are rejected.
- [ ] Your **company or organization name** as you want buyers and vendors to see it. You can change it later.
- [ ] Two to five **categories** of work you sell, the **states** you serve and, if you know them, your **NAICS codes**. See **How to pick your codes** if you don't have them yet.
- [ ] A few **keywords** buyers would use for your work (for example, *janitorial*, *custodial*, *floor care*).

SECTION 1.2

How to create your RFP Detector account

Open the sign-up page. The first question, **What brings you here?**, sets your starting point. It does not lock you in: the form itself reminds you that you can turn on the other workspaces any time, free.

TABLE **The three sign-up choices**

Choice	What the form says	Choose it if you	What it turns on
Find RFPs	Search, save and track RFPs in a pipeline.	Want to find and bid on opportunities (most users).	The client dashboard: search, saved RFPs, pipeline, alerts, calendar and reports.
List my company	Free vendor listing in the directory.	Want buyers to find you in the vendor directory.	The client dashboard plus the **Vendor** workspace.
Post RFPs	Publish RFPs and find vendors.	Buy services and want to publish an RFP or search vendors (for buyers).	The client dashboard plus the **Buyer** workspace.

Create your account

1 Pick what brings you here

Select **Find RFPs**, **List my company** or **Post RFPs**. If you choose either of the last two, an extra field appears: **Company or organization name**.

> **Tip:** Consultants and sole proprietors who mainly want to find work should pick **Find RFPs**. You can add a vendor listing later from Settings.

2 Enter your name and work email

Fill in **Full name** and **Work email**. Use an address you control long term.

3 Choose a strong password

The **Password** field needs at least 10 characters, and common passwords are rejected. The strength meter under the field shows how you are doing.

4 Add your mobile number

Enter your **Mobile number**. The form explains why: every account is verified by email and mobile so the vendors and buyers you meet are real, and you will get a 6-digit code by text on the next step. Standard message and data rates may apply.

5 Accept the terms and create the account

Tick **I accept the Terms and Privacy Policy** and select **Create account**. You move straight to **Check your email**.

> **TIP** **Pro tip: invited by a teammate?**
> If a colleague invited you, use the link in the invitation email. The sign-up page then reads **Join [organization] on RFP Detector**, your email is filled in and locked, and you skip the workspace question because you join their organization with the role they chose.

SECTION 1.3

Verifying your email and mobile number

A progress bar at the top of each screen shows the three steps: **Account**, **Verify email**, **Verify mobile**. Both checks use a 6-digit code. The code box submits on its own when you type the sixth digit, so you rarely need to press the button.

Verify your email

1. **Open the code email**
   The **Check your email** screen shows a masked version of your address and says the code expires in 10 minutes. Look for the email from RFP Detector, including in your spam or junk folder.
2. **Type the 6-digit code**
   Enter the code. It submits automatically on the sixth digit, or select **Verify email**.
3. **Need a new code or the wrong address?**
   Select **Resend code** (available after 60 seconds) or **Change email** to go back and correct the address.

Verify your mobile number

1. **Confirm your number and request the text**
   On **Verify your mobile number**, check the number and select **Text me a code**. The consent text under the field explains that the number is used only for account security, never for marketing, and that you can reply HELP for help or STOP to opt out.
2. **Enter the code from the text**
   Type the 6-digit code and select **Verify and continue**. The screen shows the last four digits of the number the code went to.

3

If the text doesn't arrive

Use **Resend code** once the timer allows it, or **Use a different number** if you mistyped. After a couple of failed tries the screen suggests using a mobile (not a landline) in the US or Canada, waiting 10 minutes, or contacting support.

> **Tip:** Sign-up can't finish without the mobile step. That is deliberate: it is how the directory and inbox stay free of fake accounts.

TABLE **Verification rules at a glance**

Rule	Email code	Mobile (SMS) code
Code length	6 digits	6 digits
Expires after	10 minutes	10 minutes
Resend	After 60 seconds	After a short wait that grows with each resend
Wrong attempts	5 tries, then request a new code	Limited tries, then request a new code
If the session times out	Sign-up sessions last about 15 minutes; select **Start again**	Sign in again to resume

> NOTE **What happens to this browser**
>
> Once your mobile is verified, this browser becomes a trusted device. Later you sign in with email and password, and a fresh text code is needed only on a new browser, every 30 days on a device, or when you change sensitive account details. Chapter 7, **Account security, teams and settings**, covers **how sign-in verification works** in depth.

SECTION 1.4

Onboarding: organization, workspaces and interests

After the mobile check you land on **Welcome, [first name]**, which promises three quick steps that you can change later in Settings. Your organization already exists at this point: RFP Detector creates it when sign-up completes, named either with the company name you entered or as *[First name]'s workspace*.

From sign-up to your dashboard

01 **Account**
Name, work email, password, mobile

↓

02 **Verify email**
6-digit code by email

↓

03 **Verify mobile**
6-digit code by text

↓

04 **Onboarding**
Organization, Workspaces, Interests

↓

05 **Home**
Dashboard with the Get started checklist

Complete onboarding

1 **Step 1, Your organization**

Enter the **Company or organization name** that vendors and buyers you connect with will see. If you work alone, tick **I work independently (use my name)** instead. If you joined through an invitation, this step just confirms which organization you joined; its owner or admin manages the settings.

2 **Step 2, What do you want to do?**

Find and track RFPs is always on (search, save, pipeline, alerts and calendar). Tick **List my company in the vendor directory** to turn on the Vendor workspace, and **Post RFPs and find vendors** to turn on the Buyer workspace. Both are free.

3 **Step 3, Your interests (optional)**

Choose up to five **Categories**, any **Sectors** (Federal, State, Local, Education, Private, Non-profit) and your **States** (hold Cmd or Ctrl to pick several). Add **NAICS codes** and **Keywords** as comma-separated lists if you have them.

> **Tip:** NAICS prefixes work: 5415 covers every computer-systems code that starts with 5415. Keep keywords to words that appear in RFP titles.

4

Create your first alert and finish

Leave **Create my first alert from these interests (daily email)** ticked and select **Finish**. Or choose **Skip interests** to go straight to the dashboard. A welcome email follows.

WORKED EXAMPLE

Worked example: a Bronx facilities company

✓ STRONG

> Maria runs a 14-person cleaning firm in the Bronx. She signs up with **List my company**, names the organization *Northside Facility Services LLC*, keeps the Vendor workspace on, and enters these interests: categories *Facilities, Maintenance & Janitorial* and *Environmental & Waste Services*; sectors *State*, *Local* and *Education*; states *New York*, *New Jersey* and *Connecticut*; NAICS *561720, 561790*; keywords *janitorial, custodial, porter, floor care*.
>
> When she selects **Finish**, RFP Detector saves those interests as her organization's matching profile (which powers Fit) and creates a daily alert named after her first two categories and states. The next morning at 7:00 AM Eastern she gets her first digest of new matches.

SECTION 1.5

What are organizations and workspaces?

An **organization** is the container for everything your team shares: the saved RFPs and pipeline, alerts, the calendar, the inbox, the vendor listing and any RFPs you post. Data, pipeline and inbox are separate per organization. A **workspace** is a set of features you switch on for an organization. Every organization has the client dashboard; Vendor and Buyer are added as you need them.

TABLE **What each workspace gives you**

Workspace	Turned on by	Where it appears	Main features
Client dashboard	Always on	Home, Saved, Pipeline, Alerts, Calendar, Reports	Search and save RFPs, pipeline board, alerts, calendar feed, RFP reports, inbox
Vendor	**List my company** at sign-up, onboarding step 2, or Settings	**Vendor** in the left rail	Free directory listing, listing editor, profile analytics, leads, matches for your listing
Buyer	**Post RFPs** at sign-up, onboarding step 2, or Settings	**Buyer** in the left rail	Post RFPs for free, see interested parties, search and shortlist vendors

Turn a workspace on or off later

1. **Open your organization settings**
   Select **Settings** in the left rail, then the **Organization** tab.
2. **Use the Workspaces switches**
   Flip **Vendor workspace** or **Buyer workspace** and confirm. The change takes effect immediately and costs nothing. Chapter 7 explains what happens when you turn one off.

You can belong to several organizations, for example your own firm and a client you help with bids. Open the account menu at the top right to see **Organizations**, switch with one click, or choose **Create or manage organizations**. Creating a new organization is free and makes you its owner. Each organization has three roles, **Owner**, **Admin** and **Member**; what each can do, and how to invite teammates, is covered in Team members and roles.

> ✕ COMMON MISTAKE **Common mistake: two accounts for one company**
> If two colleagues each sign up separately, they end up with two organizations, two pipelines and two half-finished listings. Have one person sign up and invite the others from **Settings**, **Team**. One shared pipeline is the whole point.

SECTION 1.6

A tour of the RFP Detector dashboard

Home greets you by name and answers two questions: what needs your attention today, and what is new for you. It refreshes itself while it is open, and the green **LIVE** badge in the top bar confirms the data is current (it turns amber, marked **Stale**, if updates are delayed).

TABLE **The left rail, top to bottom**

Item	What it is for
Home	Today at a glance: KPIs, needs attention, new for you, upcoming deadlines, alerts, workload and activity
Saved	Every RFP your organization tracks, as a filterable table
Pipeline	The board that moves RFPs from Saved to Won, Lost or No bid
Alerts	Saved searches that send new matches, plus your matching profile

Item	What it is for
Calendar	Due dates, question deadlines, pre-bid meetings and internal dues, with a private calendar feed
Reports	Funnel, outcomes, loss reasons and the PDF report for each tracked RFP
Vendor / Buyer	Appear only when those workspaces are on
Inbox / Settings	Conversations and connection requests; profile, security, organization and team
Find RFPs (rail footer)	Opens the public **RFP search**

Glossary

Tracked RFPs	Saved RFPs in a working stage (Saved, Qualifying, Preparing or Submitted).
Due in 7 days	Tracked RFPs whose response deadline falls in the next week. Lower is calmer.
Pipeline value	The sum of the estimated values you entered for RFPs in non-final stages.
Win rate	Won divided by (won plus lost) in the period you picked. Shows a dash until you record outcomes.
New alert matches	RFPs your alerts found in the period, compared with the period before.
Due <= 72 h	Working-stage RFPs due in the next 72 hours that are not yet submitted.

Below the tiles sit **Needs attention** (items due within 72 hours, RFPs amended since your last visit, items past an internal due date, items without an owner, pending connection requests), **New for you** (new RFPs ranked by Fit, then score), **Upcoming deadlines** for the next 14 days, **Your alerts**, **Workload by owner** and **Recent activity**. The 7, 30 and 90 day buttons change every figure and its comparison period.

> PRO TIP **Pro tip: the command palette**
>
> Press **Cmd+K** on a Mac or **Ctrl+K** on Windows anywhere in the dashboard to open the search bar at the top. It finds RFPs, tracked items, vendors and conversations, and offers quick actions such as **Find RFPs**, **Create alert**, **Invite teammate**, **Edit listing** (Vendor) and **Post an RFP** (Buyer).

SECTION 1.7

Your first search, first save and first alert

The **Get started** card on Home lists four steps and ticks each one off by itself: **Create an alert**, **Save your first RFP**, **List as a vendor or post an RFP**, and **Invite a teammate**. The fastest way through the first two is a single search.

Run a search, save an RFP and turn the search into an alert

1. **Open the search**
   Select **Find RFPs** at the bottom of the left rail (or go to Search RFPs). Type two or three words buyers would use, such as *janitorial services*. Results update as you type.

2. **Narrow with two or three filters**
   In the **Filters** rail, tick your **State** and **Sector**, and set **Due** to 14 or 30 days so you only see RFPs you have time to answer. Chapter 2 explains every filter.

3. **Save the first promising RFP**
   Select the bookmark button on a result card, or open the RFP and select **Save**. A message confirms **Saved to your pipeline**, and the RFP's deadlines appear in your Calendar.

4. **Turn the search into an alert**
   Select **Save as alert** at the top of the results. The alert editor opens with your filters already filled in. Name it, choose **Daily**, leave **Email me** on and select **Create alert**.

> **Tip:** The editor's **Matches right now** panel shows how many open RFPs match today. If it says zero, widen the alert before you save it.

SECTION 1.8

Your first week on RFP Detector

A realistic first-week setup plan

Day 1 — **Account and first alert**
Sign up, verify, finish onboarding with interests, save two or three RFPs and create one alert from a search.

Day 2 — **Tune your matching profile**
In **Alerts**, open the **Matching profile** tab (or your vendor listing's **Matching (Fit)** section) and add exclude keywords and a contract size range so Fit ranks the right RFPs first.

Day 3 — **Invite your team**
From **Settings**, **Team**, invite the people who write, price or approve bids.

Day 4 — **Publish your vendor listing**
If buyers should find you, complete and publish your listing. See Building a vendor profile buyers can find.

Day 5 — **Run your first pipeline review**
Move each saved RFP to Qualifying or No bid, set owners and internal due dates, and subscribe to the calendar feed. Chapter 3 has a weekly routine.

SECTION 1.9

Troubleshooting sign-up and sign-in

TABLE Common problems and fixes

Problem	What to do
The email code never arrives	Check spam or junk, add RFP Detector to your safe senders, then use **Resend code** after 60 seconds. Use **Change email** to fix a typo.
The code says it has expired	Codes last 10 minutes and allow a few wrong tries. Request a new code; if the sign-up session itself expired, select **Start again**.
The text message never arrives	Make sure it is a mobile number in the US or Canada, check that the phone can receive short-code texts, then use **Resend code** when the timer allows. Use **Use a different number** if needed, or contact support.

Problem	What to do
"This email can't be used for a new a ccount"	An account already exists for that address. Go to **Sign in** and use **Forgot password?** if you need to (see **resetting a password**).
Asked for a code on every sign-in	Your browser may be clearing cookies, or you unticked **Remember this device for 30 days**. Keep that box ticked on your own computer.

> ⚠ **WARNING** **Before you bid: registrations are separate**
>
> An RFP Detector account is not a government vendor registration. To bid on most public contracts you also need the buyer's own registration, such as your federal entity registration and Unique Entity ID (UEI), NYC PASSPort or NJSTART. Requirements change, so confirm them with each agency. Start with **Getting bid-ready before you register**.

Frequently asked questions

Q Is RFP Detector free to use?

Creating an account is free. RFP Detector states that listing your company, tracking RFPs, alerts and messaging are free, turning on the Vendor or Buyer workspace costs nothing, and the RFP report needs no account at all.

Q Do I need an account to search for RFPs?

No. The **RFP search**, RFP pages, scores and PDF reports are public. You need a free account to save RFPs, build a pipeline, receive alerts, see your personal Fit score, open the official solicitation link where it is gated, and message other organizations.

Q Why does RFP Detector need my mobile number?

Every account is verified by email and mobile so the vendors and buyers you meet are real people. The number receives security codes only: at sign-up, when you sign in on a new browser, every 30 days on a device, and when you change sensitive account details. It is never used for marketing, and RFP Detector sends no notification texts. Use a mobile number in the US or Canada; landlines and numbers that block short-code texts usually fail.

Q What if my verification code expires?

Email and text codes expire after 10 minutes. Request a new one with **Resend code**. The email code can be resent after 60 seconds; the text code after a short wait that grows with each resend. If the sign-up session expired (about 15 minutes), select **Start again**.

Q Can I change between finding RFPs, listing my company and posting RFPs later?

Yes. The sign-up choice only sets your starting workspaces. An owner or admin can turn the Vendor and Buyer workspaces on or off at any time in **Settings**, **Organization**, **Workspaces**. Finding and tracking RFPs is always on.

Q Can I belong to more than one organization?

Yes. Use the account menu at the top right to switch organizations, or **Create or manage organizations** to add one (you become its owner). Each organization has its own pipeline, alerts, inbox and listing, so switch before you save or message.

→ KEEP GOING

Searching RFPs and reading RFP Detector scores
Chapter 2: every filter, every RFP page section, the score and Fit
rfpdetector.com/guides/how-to-use-rfp-detector/searching-rfps-and-reading-scores

Tracking bids: pipeline, alerts and notifications
Chapter 3: run your bids week to week
rfpdetector.com/guides/how-to-use-rfp-detector/tracking-bids-pipeline-and-alerts

Building a vendor profile buyers can find
Chapter 4: publish your free listing
rfpdetector.com/guides/how-to-use-rfp-detector/building-your-vendor-profile

Account security, teams and settings
Chapter 7: trusted devices, roles and invitations
rfpdetector.com/guides/how-to-use-rfp-detector/account-security-and-team-settings

Finding RFPs with RFP Detector
The strategy behind good searches and alerts
rfpdetector.com/guides/how-to-find-government-contracts/finding-rfps-with-rfp-detector

Create your free account
rfpdetector.com/sign-up

END OF CHAPTER 1

Next: 02 How to Search RFPs and Read RFP Detector Scores

02

CHAPTER 2

How to Search RFPs and Read RFP Detector Scores

A screen-by-screen guide to searching RFPs on RFP Detector: the query syntax, every filter and sort, each section of an RFP page, how to read the RFP Detector Score and your Fit score (and what they are not), the free PDF report, and saving RFPs to your pipeline.

15 min read · 8 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- The search covers every sector in one index. Use *quotes* for an exact phrase, a minus sign to exclude a word and OR for alternatives.
- Every filter lives in the page address, so a filtered search can be bookmarked, shared or pasted into an alert.
- The **RFP Detector Score** (0–100) rates how attractive and workable an RFP is for a typical qualified bidder. It starts at 50 and six factors move it up or down.
- **Fit** (0–100) is private to your organization and measures relevance to your matching profile. Neither score is your probability of winning.
- The five-page RFP report (PDF) is free, needs no account and is ideal for a bid/no-bid meeting.

IN THIS CHAPTER

2.1 How to search RFPs: the query bar and keyword syntax 23
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2.8 Saving RFPs to your pipeline 32

Knowing how to search RFPs well is the difference between a pipeline full of real chances and an inbox full of noise. This chapter is the reference for RFP Detector's search and RFP pages: the keyword syntax, what every filter and sort does, how to read each section of an RFP page, how the **RFP Detector Score** and your **Fit** score work, how to download the RFP report as a PDF and how to save RFPs. For the strategy behind your searches (which codes and keywords to target), pair it with **Finding RFPs with RFP Detector**.

SECTION 2.1

How to search RFPs: the query bar and keyword syntax

Open **Search RFPs**. The big query bar accepts a keyword, an agency name or a NAICS code, and results refresh about a third of a second after you stop typing. Federal, state, local, education, private and non-profit RFPs are all in the same index, so one search can return a city cleaning bid and a federal set-aside side by side.

TABLE **What you can type in the query bar**

You type	What it finds	Example
Plain words	RFPs with those words in the title, solicitation number, issuer, summary or description. Small typos in titles are tolerated.	`janitorial services`
Words in quotes	That exact phrase only	`"snow removal"`
A minus sign before a word	Excludes RFPs containing that word	`roofing -asbestos`
OR between words	Either word	`custodial OR janitorial`
A NAICS code or prefix (2–6 digits)	RFPs carrying that code or any code that starts with it	`5415`
A solicitation number	The notice with that number	`RFP-2026-0142`
An agency or office name	RFPs from that issuer and its offices	`Port Authority`

> **TIP** **Pro tip: operators switch off typo tolerance**
>
> As soon as you use quotes, a minus sign or OR, the search matches exactly what you typed and stops forgiving typos. Check your spelling, and build negative keywords deliberately using **Negative keywords**.

SECTION 2.2

Every search filter explained

Filters sit in a rail to the left of the results. On a phone, select **Filters** to open them in a panel, then **Show [n] results**. Each group has its own clear button, active filters appear as removable chips above the results, and the counts next to each option already reflect your other filters, so you can see what a click will do before you make it.

TABLE **The filter rail, top to bottom**

Filter	Options	How to use it
Sector	Federal, State, Local, Education, Private, Non-profit	Start here if you only sell to certain kinds of buyers.
Due	7 d, 14 d, 30 d, 60 d, Any, plus **Custom date range** (From, To)	Set 14 or 30 days to hide RFPs you can't realistically answer.
Posted	24 h, 7 days, 30 days, Any	Use 24 h or 7 days for a quick look at what's new.
RFP Detector Score	Grade chips A 80+, B 65+, C 50+, D 35+, or a **Minimum score** slider	Raise the floor when results are plentiful; leave it at Any when they're scarce.
Fit (your profile)	**Minimum Fit** slider	Appears only when you're signed in and your organization has a matching profile.
Category	26 categories, searchable with **Filter categories**	Pick the categories of work you sell, for example *IT & Software*.
State	States in the current results, plus **Nationwide / Remote**	Matches the place of performance, or the issuer's state when no place is given.
Notice type	RFP, RFQ, IFB, RFI, Sources sought, Presolicitation, Solicitation and more	Exclude RFIs and sources-sought notices when you only want biddable work.
Issuer	Agencies and organizations in the results, searchable	Follow one buyer; an issuer includes its sub-offices.

Filter	Options	How to use it
NAICS	Type a code or words; prefixes match their children (5415 matches 541511)	Add your primary and secondary codes.
Set-aside	**Any small-business set-aside**, 8(a), HUBZone, SDVOSB, WOSB and more	Choose only set-asides you're certified for.
Value	**Minimum**, **Maximum**, and **Include RFPs without a value**	Ranges include estimates. Keep the switch on; many RFPs don't publish a value.
Listing	Federal notices, Other public notices, Posted on RFP Detector	Narrow to RFPs posted directly by buyers on RFP Detector.

✕ COMMON MISTAKE **Common mistake: turning off "Include RFPs without a value"**

Many state, local and private RFPs never publish a budget. Switching this off can hide most of them. Use **Value** to exclude work that is clearly too big or small, but leave RFPs without a value in.

Not sure which set-asides you can bid on? Set-asides on solicitations explains them, and How certifications help you win covers getting certified. For notice types, see RFI and sources sought.

SECTION 2.3

Status tabs, sorting and reading a result card

Above the results, the status tabs switch between **Open**, **Closed** and **All**, each with a count. Closed RFPs are useful research: they show who buys your kind of work and what they asked for last time. The sort menu offers five orders.

TABLE **Sort options**

Sort	Best for
Best match	Relevance to your keywords (available only when you've typed a query; it's the default then)
Newest	A daily scan of fresh RFPs (the default with no query)
Closing soonest	Catching quick-turn RFQs before they close
Highest score	Seeing the most attractive RFPs first
Highest value	Larger contracts first (RFPs without a value sort last)

- **Score badge** on the left, with the score and a caption: the grade label for live scores, *At publication* for closed RFPs, *Cancelled*, or *Not scored*.
- **Title**, then the **issuer** and location.
- **Chips**: sector, status (when not simply open), notice type, set-aside and category.
- **Why this score** on wide screens: the one-line reason behind the number.
- **Facts**: posted date, a countdown to the due date, the value (estimates are marked) and the listing type: *Federal notice*, *Public notice* or *Posted on RFP Detector*.
- The **bookmark** button to save the RFP, and your **Fit** badge when it applies.

Results load 25 per page. If a search is very broad, RFP Detector pages through roughly the first thousand results and asks you to add a filter. When nothing matches, the page suggests filters to remove (with the number of results each would bring back), offers a spelling correction, and lets you **Save as alert** so you hear about the first match.

SECTION 2.4

Reading an RFP page section by section

Select any title to open its RFP page. The top band holds the badges (sector, notice type, status such as *Closing soon* or *Amended*, a *Not openly competed* warning when it applies, and the listing type), the title, the issuer and office, the place of performance, the solicitation number with a copy button, and the dates it was updated and scored. Banners appear when an RFP closes soon, was amended (with what changed), is upcoming, closed or cancelled.

TABLE **RFP page sections and what to look for**

Section	What it shows	What to check
Due panel	Due date and countdown, **Questions due**, **Pre-bid meeting** (with a *Mandatory* badge), posted date, anticipated award	Missing a mandatory pre-bid meeting usually disqualifies you. Put question deadlines in your calendar.
Score card	**RFP Detector Score**, grade label, data confidence and a one-line reason	Read the reason, then **Breakdown**.
Fit for your organization	Your Fit badge and reasons (signed in, with a matching profile)	Why it fits or doesn't: codes, keywords, eligibility, location, size.
Actions	**Save**, **Download report (PDF)**, **Official solicitation**, **Share**, **Copy link**; on buyer-posted RFPs also **I'm interested** and **How to respond**	Save anything you'll discuss with your team.

Section	What it shows	What to check
What this RFP is about	A plain-English summary	Is it actually your kind of work?
Key facts	Issuer, office, sector, notice type, category, NAICS, PSC (federal), set-aside, place of performance, submission method, solicitation number, contract term, listing	Set-aside and place of performance are frequent deal-breakers.
Score breakdown	Each factor's contribution, its data status and a score trend	Which factors pull the score down, and are they real problems for you?
Requirements & submission	Eligibility, deliverables and how to submit	Licenses, insurance, bonding and submission method.
Description and Documents	The full description and the solicitation files	Download and read the actual documents before deciding.
Contacts	Named contacts with email, phone and copy buttons	Who receives questions.
Timeline & history	Posting and every change since	Amendments that moved dates or changed scope.
Market context	Federal award history for the agency and NAICS, or the issuer and category on RFP Detector	How often this buyer buys this work, and typical award sizes.
Similar open and More from issuer	Related open RFPs and the issuer's other RFPs	Adjacent opportunities worth saving.

⚠ **WARNING** **Always confirm on the official solicitation**

RFP Detector is independent and not affiliated with any issuer. Some deadlines on public notices are flagged *extracted with low confidence*. Before you commit time, open the **Official solicitation** (signed-in users get the link; visitors see **Sign in free to open the official solicitation**) and confirm every date and requirement with the issuer. The **first-read checklist** shows what to look for.

SECTION 2.5

How to read the RFP Detector Score

The RFP Detector Score answers one question: how attractive and workable is this RFP for a typical qualified bidder, today? It is the same for every visitor, nobody can buy or edit it, and the full method is public on the score methodology page.

50
Starting point for every RFP
Factors add or subtract from here

6
Weighted factors
Unknown data counts as neutral

0–100
Score range, with grades A to F
Refreshed nightly while open

TABLE **The six factors (weights as published for score version 1.0.0; the methodology page always shows the current ones)**

Factor	Question it answers	Weight
Value	How much money is on the table?	20
Competition & access	Who can bid, and how concentrated is the market?	20
Issuer & market	Does this issuer actively buy this kind of work?	20
Time & stage	Is there a workable window, and is this a real chance to bid?	15
Clarity & completeness	Is the notice clear and complete enough to respond to?	15
Freshness	How new is it?	10

TABLE **Grades and labels**

Grade	Score	Label
A	80–100	Excellent
B	65–79	Strong
C	50–64	Fair
D	35–49	Limited

Grade	Score	Label
F	0–34	Poor

In the **Score breakdown**, each factor is marked **Measured** (taken from the notice or the buyer), **Estimated** (inferred from award history or similar RFPs, so it moves the score less) or **Unknown** (no effect at all). The **data confidence** chip (High, Medium or Low) tells you how much of the score rests on measured data. Notices that are not openly competed, such as sole-source notices, and purely informational notices are capped at 30. Closed, awarded and cancelled RFPs show the score *at publication*, frozen.

SECTION 2.6

What does the Fit score measure?

Fit (0–100) shows how well an RFP matches your organization's matching profile: the categories, NAICS codes, keywords, service area, certifications and contract size you entered at onboarding, on the **Alerts**, **Matching profile** tab, or in your vendor listing's **Matching (Fit)** section. It is private to signed-in members of your organization and never changes the public score.

TABLE **What drives Fit**

Input	Weight	What it compares
NAICS codes	35	Your codes with the RFP's. An exact six-digit match counts most; a shared prefix or a matching category counts partly.
Keywords	25	Your keywords with the RFP's wording. Exclude keywords push Fit down.
Eligibility	15	Whether a set-aside needs a certification you've listed.
Geography	15	Your service states, Nationwide or Remote, with the place of performance.
Contract size	10	Your **Contract size from / to** range with the RFP's value.

- **Labels:** *Strong fit* is 75 or higher, *Possible fit* 50 to 74, *Weak fit* below 50.
- **Caps:** a title containing one of your exclude keywords caps Fit at 20; a set-aside requiring a certification you haven't listed caps it at 25; a notice that is not openly competed caps it at 30.
- **Where you use it:** the Fit badge on cards and RFP pages, the **Minimum Fit** filter in search, **Minimum Fit** on alerts, and *New for you* on Home.

TABLE **RFP Detector Score vs Fit**

	RFP Detector Score	Fit
Who sees it	Everyone; public on every RFP	Only signed-in members of your organization
What it rates	The opportunity itself: value, competition, issuer, timing, clarity, freshness	Relevance to your matching profile: codes, keywords, eligibility, geography, contract size
Changes when	The RFP or market data changes (refreshed nightly while open)	The RFP or your matching profile changes
Use it to	Rank and filter the market	Find what *you* should read first

✕ COMMON MISTAKE **What the scores are not**

Neither score is your probability of winning, a rating of the issuer, or advice to bid or not bid. A Strong, high-Fit RFP can still be wrong for you because of bonding, a mandatory site visit or a strong incumbent. Use the scores to decide what to read first, then make the call with **a bid/no-bid framework**.

Two-minute triage for any search result CHECKLIST · 6 ITEMS

- [ ] **Is it our kind of work?** Read the plain-English summary, not just the title.
- [ ] **Can we bid?** Check the set-aside, notice type and place of performance in **Key facts**.
- [ ] **Is there time?** Check the due date, **Questions due** and any *Mandatory* pre-bid meeting.
- [ ] **Why this score?** Open **Breakdown** and note which factors are Measured, Estimated or Unknown.
- [ ] **Does it fit us?** Read the Fit reasons, especially any cap from an exclude keyword or a missing certification.
- [ ] **Save or skip.** Save anything worth a team conversation and move on from the rest.

WORKED EXAMPLE

Worked example: triaging two results in two minutes

✓ STRONG

> A Newark IT firm searches `"help desk" OR "service desk" -hardware`, filtered to New Jersey and New York, due within 30 days.
>
> **Result 1:** a county service desk RFP, score 71 (B, Strong), Fit 82 (Strong fit). The breakdown shows Value and Competition as positives and a 26-day window. They save it.
>
> **Result 2:** a federal service desk notice, score 28, labeled *Not openly competed* (a sole-source notice). Fit is capped at 30. They skip it in seconds instead of reading 60 pages.

SECTION 2.7

Downloading the RFP report (PDF)

Every RFP has a free RFP Detector Report: five US Letter pages built for printing or sharing in a bid/no-bid meeting. No account is needed. Select **Download report (PDF)** on the RFP page (or **Report** on the sticky bar on phones). Signed in, you'll also find it in the RFP's details panel in Saved and Pipeline, and on the **Reports** page's **RFP reports** tab, which keeps a **Download history** for your team.

TABLE **What's in the report**

Page	Contents
1. Summary	Title and issuer, the score with its grade, key facts at a glance, the summary, key dates and a QR code back to the RFP page
2. Score breakdown	The six factor contributions with their data status and explanation, plus the score trend
3. Market	Federal award history for the agency and NAICS, or the issuer and category's activity on RFP Detector
4. Requirements & logistics	Eligibility, place and submission, contacts, documents and a list of **Bid / no-bid questions**
5. Related RFPs	Similar open RFPs, more from the issuer, data as-of times and the disclaimer

> **NOTE** **Report tips**
> Reports rebuild when the RFP changes, so download a fresh copy after an amendment. If many reports are downloaded from one network in a short time, you may be asked to try again later.

SECTION 2.8

Saving RFPs to your pipeline

Save an RFP and set its first stage

1. **Select Save**
   Use the bookmark on a result card or the **Save** button on the RFP page. Signed out, you're asked to sign in and brought back. A message confirms **Saved to your pipeline**.
2. **Pick a stage**
   The button now reads **Saved · Saved**. Open it for **Move to stage** (Qualifying, Preparing, Submitted, Won, Lost, No bid), **Open in pipeline** or **Remove from pipeline**.
3. **Work it in the dashboard**
   Saved RFPs appear in **Saved**, on the **Pipeline** board and in **Calendar**, with amendment notices and deadline reminders. Chapter 3 covers the pipeline board.

> **NOTE** **Buyer-posted RFPs behave a little differently**
> On RFPs *Posted on RFP Detector*, the buyer can see that your organization saved the RFP. **I'm interested** tells the buyer directly, saves the RFP and lets you add an optional note of up to 500 characters; the buyer can reply in your inbox. RFPs with notes, or past the Saved stage, can only be removed from the dashboard, so nothing is lost by accident.

Frequently asked questions

Q **What does the RFP Detector Score mean?**

It rates how attractive and workable an RFP is for a typical qualified bidder, from 0 to 100. Every RFP starts at 50, and six weighted factors (value, competition and access, issuer and market, time and stage, clarity and completeness, freshness) add or subtract points. Grades run from A (80+) to F (below 35). The methodology shows every curve and weight.

Q Is a high score my chance of winning?

No. The score does not estimate your probability of winning and does not rate the issuer. It is informational and is not advice to bid or not bid. Your win chances depend on your fit, price, past performance and competition, which is why you still run a bid/no-bid decision.

Q Why don't I see a Fit score?

Fit appears only when you're signed in and your organization has a matching profile. Add one on the **Alerts** page under **Matching profile**, or in your vendor listing's **Matching (Fit)** section if the Vendor workspace is on. Fit is private and never shown publicly.

Q Why does a closed RFP show a different score?

Closed, awarded and cancelled RFPs show their score at publication, frozen. Only open and upcoming RFPs carry a live score, which is refreshed nightly.

Q How do I search for an exact phrase or exclude a word?

Put the phrase in quotes, for example "snow removal", and put a minus sign before a word to exclude it, for example roofing -asbestos. Use OR for alternatives. With these operators the search matches exactly what you typed.

Q Is the RFP report free, and do I need an account?

Yes, it is free, and no account is needed. Select **Download report (PDF)** on any RFP page. Signed-in teams can also download reports for every tracked RFP from the **RFP reports** tab of the **Reports** page.

Q Why can't I open the official solicitation or documents?

On some RFPs the official solicitation link and document links are shown only to signed-in users. Sign in (it's free) and the **Official solicitation** button appears. Always rely on the official notice for dates and requirements.

→ RELATED GUIDES

Tracking bids: pipeline, alerts and notifications
Chapter 3: what happens after you save
rfpdetector.com/guides/how-to-use-rfp-detector/tracking-bids-pipeline-and-alerts

Getting started with RFP Detector
Chapter 1: account, verification and workspaces
rfpdetector.com/guides/how-to-use-rfp-detector/getting-started-with-rfp-detector

Building your contract search strategy
Codes, keywords and negative keywords
rfpdetector.com/guides/how-to-find-government-contracts/building-your-contract-search-strategy

Bid/no-bid decision framework
Turn scores into a decision
rfpdetector.com/guides/how-to-find-government-contracts/bid-no-bid-decision-framework

How to read and shred an RFP
What to do once you open the documents
rfpdetector.com/guides/how-to-write-a-winning-proposal/how-to-read-and-shred-an-rfp

RFP Detector Score methodology
rfpdetector.com/methodology/score

Search open RFPs
rfpdetector.com/search

END OF CHAPTER 2

Next: 03 Bid Tracking: Your Pipeline, Alerts and Notifications

03

CHAPTER 3

Bid Tracking: Your Pipeline, Alerts and Notifications

How to run your bids week to week in RFP Detector: the Saved table and details panel, the pipeline board and its stages, the calendar and its private feed, alerts and your matching profile, notifications and the inbox, and a weekly routine that keeps nothing slipping.

15 min read · 8 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- **Saved** is your team's full bid list as a table; **Pipeline** is the same RFPs as a board, from Saved through Qualifying, Preparing and Submitted to Won, Lost or No bid.
- Give every RFP an **owner** and an **internal due date**. Deadline reminders go to the owner, and Home flags anything without one.
- The **Calendar** shows due dates, question deadlines, pre-bid meetings and internal dues, and its private feed puts them in Outlook, Apple Calendar or most other calendar apps.
- Alerts send each new matching RFP once, Instant, Daily or Weekly, in the app and by email, with no email when nothing matches.
- A 30-minute weekly review (new matches, stage moves, deadlines, outcomes) is enough for most small teams.

IN THIS CHAPTER

3.1 Saved RFPs: your team's bid list 36
3.2 The RFP details panel: owners, notes and checklists 37
3.3 The pipeline board and its stages 39
3.4 How do you track bid deadlines on the calendar? 41
3.5 Setting up RFP alerts 42
3.6 Notifications, email preferences and the inbox 43
3.7 Reports: learning from wins and losses 45
3.8 A weekly bid tracking routine 45

Bid tracking is where most small teams lose contracts they could have won: a question deadline nobody owned, an amendment nobody saw, a promising RFP that sat in an inbox until it closed. RFP Detector's tracking tools exist to stop that. This chapter shows you how to track bids from the moment you save an RFP to the day you record the outcome: the Saved table, the pipeline board and its stages, the calendar, alerts, notifications and the inbox, finished with a weekly routine you can copy.

> **NOTE** **Before you start**
>
> You need at least one saved RFP. If you don't have one yet, follow **Your first search, first save and first alert** or **Saving RFPs to your pipeline**. Everything in this chapter belongs to your current organization and is shared with your teammates.

SECTION 3.1

Saved RFPs: your team's bid list

Open **Saved** from the left rail. It lists every RFP your organization tracks, open and closed, as a dense table. A summary strip across the top counts **Tracked**, **Active**, **Est. value, active**, **Due in 7 days**, **Awaiting decision**, **Won · Lost**, **Unassigned** and **High priority**; most of those cells are links that filter the table.

TABLE **Saved table filters**

Filter	Options
Search box	Searches title, issuer and notes
Stage	Saved, Qualifying, Preparing, Submitted, Won, Lost, No bid
Status	Open and closed, Open, Closed
Owner	Anyone, Me, Unassigned, or a teammate
Sector and Category	The sector and categories of the RFPs you track
Due	Any time, Next 3 days, Next 7 days, Next 14 days, Next 30 days, Already closed
Priority	High, Medium, Low

Columns include the score, your Fit, the RFP, due date, status, stage, owner, priority, estimated value, category, internal due date, last note, win odds, time in stage and the date saved (some appear only on wider screens). Sort by any column. Select several rows to **Move** them to a stage, set an **Owner** or **Priority**, or unsave them in one go.

SECTION 3.2

The RFP details panel: owners, notes and checklists

Click any row in Saved, or any card on the board, to open the details panel. Its header shows the score, issuer, a due-date countdown, your Fit and a link to the public **RFP page**. Four tabs hold the work.

Set up a newly saved RFP in the details panel

1. **Overview: assign it**

   Set the **Stage**, **Owner** and **Priority**, then an **Internal due date** a few days before the real deadline. Add **Est. value** (it feeds Pipeline value on Home) and, if you like, **Win probability**. The **Download report (PDF)** button is here too.

   > **Tip:** An internal due date is your team's own deadline for a final draft. Home's **Needs attention** flags anything past it.

2. **Notes: record the reasoning**

   Notes are visible to everyone in your organization. Capture the go/no-go reasoning, contacts and next steps. Press **Cmd+ Enter** or **Ctrl Enter** to add. The latest note shows in the Saved table and on pipeline cards.

3. **Checklist: break it into steps**

   Add steps such as *Confirm insurance certificate* or *Submit questions*, assign each to a teammate and tick them off. The tab shows progress, and completed steps are logged.

4. **Activity: see what changed**

   Stage moves, notes, owner changes and amendments to the RFP appear here in order, so anyone can catch up in a minute.

TEMPLATE

Qualifying note to paste into the Notes tab

Copy-ready online

A short, consistent note that makes the bid/no-bid decision visible to the whole team.

WHEN TO USE When you move an RFP to Qualifying, after reading the solicitation documents.

QUALIFYING NOTE: [RFP TITLE] ([SOLICITATION NUMBER])
Owner: [OWNER NAME] Internal due: [INTERNAL DUE DATE] Real due: [DUE DATE AND TIME ZONE]

Fit with our work: [ONE SENTENCE ON SCOPE MATCH]
Eligibility: [SET-ASIDE / CERTIFICATION / LICENSE REQUIREMENTS AND WHETHER WE MEET THEM]
Mandatory events: [PRE-BID MEETING OR SITE VISIT DATE, OR NONE]
Questions deadline: [DATE], questions we will ask: [LIST]
Risks: [BONDING, INSURANCE, STAFFING, TIMELINE, INCUMBENT]
Score and Fit: [RFP DETECTOR SCORE AND GRADE] / [FIT]
Decision: [BID / NO BID / NEED MORE INFO] by [DECISION DATE]
Next step: [ACTION], [WHO], [WHEN]

FIELDS TO FILL IN · 5

[OWNER NAME]	The one person accountable for this bid; match the Owner field.
[INTERNAL DUE DATE]	Your final-draft deadline, usually three to five business days before the real due date.
[MANDATORY EVENTS]	Any mandatory pre-bid meeting or site visit from the due panel. Missing one usually disqualifies you.
[RISKS]	Anything that could stop you bidding or performing. See the bid/no-bid red flags guide.
[DECISION]	Make the call by a date. Move the RFP to Preparing or No bid when you do.

SECTION 3.3

The pipeline board and its stages

Pipeline shows your tracked RFPs as cards in stage columns. Switch between **Board** and **Table** at the top right. Each card shows the score, title, issuer, due date, owner, note count and estimated value. Columns can be collapsed to save space.

Pipeline stages

01 **Saved**
Worth a closer look

↓

02 **Qualifying**
Reading documents; bid/no-bid underway

↓

03 **Preparing**
Decision made; proposal in progress

↓

04 **Submitted**
Waiting on the buyer

↓

05 **Won / Lost / No bid**
Outcome recorded

TABLE When to move an RFP to each stage

Stage	Move here when	What RFP Detector does
Saved	You found it and want to look properly	Adds its deadlines to Calendar; reminders go to its owner; counts in Due <= 72 h until submitted
Qualifying	You're reading the documents and deciding	Keeps reminders and amendment notices going
Preparing	You decided to bid and are writing	Keeps reminders going; the checklist matters most here

Stage	Move here when	What RFP Detector does
Submitted	The response is in	Asks for the **Date submitted**; stops deadline reminders
Won	You were awarded	Asks for **Award amount** (prefilled with your estimate) and **Award date**
Lost	Another bidder won	Asks for **Date notified**, a **Main reason** (Price, Technical, Past performance, Eligibility, Other) and a note
No bid	You decided not to bid	Asks for an optional **Reason**, for example outside your service area or timeline too short

Move a card

1. **Drag and drop**
   Drag a card to another column.
2. **Or use the keyboard**
   Focus a card, press **Space** to pick it up, move it with the arrow keys and press **Space** again to drop it.
3. **Or use the card menu**
   Open the card's **Move to…** menu and choose a stage. For Submitted, Won, Lost and No bid, fill in the short outcome form.

> **Tip:** Record a reason for every loss and no-bid. After a few months, the **Loss reasons** chart in Reports tells you whether price, technical scores or eligibility is costing you work.

COMMON MISTAKE **Common mistake: a pipeline nobody prunes**

A board with 60 cards in Saved is a reading list, not a pipeline. Each week, move every Saved card to Qualifying or No bid. Use **knock-out questions** to decide quickly.

SECTION 3.4

How do you track bid deadlines on the calendar?

Calendar collects every date that matters for the RFPs your organization tracks. Switch between **Month**, **Week** and **Agenda** (the next 45 days), step back and forward, and filter by **Owner**, **Stage** and **Event type**. A **Next up** list and counts for the period sit beside the grid, and clicking an event opens its details panel.

TABLE **Calendar event types**

Event type	Comes from
Due	The RFP's response deadline
Questions due	The deadline for written questions, when the RFP states one
Pre-bid meeting	A pre-bid meeting or conference, marked if mandatory
Internal due	The internal due date you set in the details panel
Your RFP closes	RFPs your organization posted (Buyer workspace only)

Put your deadlines in Outlook, Apple Calendar or another app

1. **Create your private feed link**
   In the **Subscribe** card on the Calendar page, select **Create private feed link**, then **Copy link**.
2. **Subscribe in your calendar app**
   In Outlook, choose **Add calendar**, then **Subscribe from web**, and paste the link. In Apple Calendar, use the webcal link in the Subscribe card. Most other calendar apps have an option to add a calendar from a URL.
3. **Keep the link private**
   Anyone with the link can see your organization's deadlines. If it leaks, select **New link** (the old one stops working at once) or **Turn off**.

> **Tip:** Calendar apps refresh subscribed calendars on their own schedule, often every few hours, so check RFP Detector itself on the day of a deadline.

> ☆ PRO TIP **Pro tip: plan backward from the due date**
>
> When you move an RFP to Preparing, set the internal due date first, then add checklist steps with dates: questions submitted, pricing approved, final review, upload. **Reviews, submission and debriefs** explains why portals punish last-hour uploads.

SECTION 3.5

Setting up RFP alerts

An alert is a saved search that sends you RFPs first seen since its last run. Each RFP is sent once per alert, and no email goes out when nothing matches. Matches always appear in the app; email is optional. Open **Alerts** from the left rail to see your alerts in a table with their criteria, cadence, channels, last sent time, new matches in the last 7 days, how many are open now, and an **Active** switch.

Create an alert

1. **Start from a search or from scratch**
   Select **Save as alert** on any search, or **New alert** on the Alerts page. You can also paste any search or RFP-list link into **Start from a search link** and select **Use link**.
2. **Set the filters**
   Use **Keywords** (with quotes, minus and OR), **Sector**, **Category**, **State**, **Notice type**, **Set-aside**, **Source**, **NAICS**, a value range, **Due within**, **Posted within** and a minimum **RFP Detector Score** (Any, 50, 60, 70 or 80). RFPs without a stated value stay included.
3. **Watch Matches right now**
   The side panel counts the open RFPs that match today and lists the first few. Aim for a steady handful, not hundreds and not zero.
4. **Name it and choose how often**
   Give it an **Alert name** (it appears in emails). Under **How often**, pick **Instant** (as new RFPs are added, at most hourly), **Daily** (7:00 AM ET) or **Weekly** (Monday, 7:00 AM ET).
5. **Choose email and Minimum Fit**
   Leave **Email me** on for email digests (up to 25 RFPs each). If your organization has a matching profile, set **Minimum Fit** (Off, 50, 60 or 75; 60 is the default) to receive only RFPs that fit you well. Select **Create alert**.

TABLE **Which cadence to choose**

Cadence	Delivery	Best for
Instant	As new RFPs are added, at most hourly	Narrow, high-value searches and quick-turn RFQs
Daily	7:00 AM Eastern	Your main searches (the right default for most teams)
Weekly	Monday, 7:00 AM Eastern	Broad market watching, adjacent categories, other states

Each alert's **…** menu offers **Preview matches**, **Open in search**, **Edit**, **Pause** or **Resume**, and **Delete**. Deleting stops it immediately; RFPs it already sent stay in your notifications. A **Suggested alerts** card proposes alerts built from your matching profile and onboarding interests. The **Matching profile** tab holds the categories, NAICS and PSC codes, keywords, exclude keywords, service area, certifications and contract size that power Fit; with the Vendor workspace on, that profile lives in your listing instead. For alert strategy, see Setting up RFP alerts that catch the right opportunities.

Alert hygiene

Do

- ✓ Three to six focused alerts, each named for what it watches
- ✓ Daily for core work, weekly for exploration
- ✓ Pause an alert during a busy month instead of deleting it
- ✓ Review **New · 7 d** monthly and tighten noisy alerts

Don't

- ✗ One giant alert for everything
- ✗ Instant cadence on broad searches
- ✗ Ignore an alert that sends nothing for weeks (widen it)
- ✗ Leave alerts nobody reads switched on

SECTION 3.6

Notifications, email preferences and the inbox

The bell in the top bar shows unread notifications. The **Notifications** page lists them with filters (**All**, **Unread**, **Alerts**, **Deadlines**, **Messages**, plus **Buyer** and **Vendor** when those workspaces are on, and **System**), a **Mark all read** button and an unread count by category. Notification preferences let you choose, per event, whether it reaches you **In-app**, by **Email**, or both.

TABLE **Key notifications for bid tracking**

Notification	What triggers it	Email by default
Alert matches	New RFPs that match your alerts	Yes
Tracked RFP amended	A due date moved, documents were added or details changed on an RFP you track	Yes
Deadline reminders	Due dates and internal due dates for pipeline items you own in Saved, Qualifying or Preparing	Yes
Tracked RFP awarded	An award was published for an RFP you own	No (in-app)
Tracked RFP cancelled	An RFP you own was cancelled	No (in-app)
New messages	A message in your inbox; emailed only if still unread after 10 minutes, at most one per conversation per hour	Yes
Security and account	Codes, password and email changes, new sign-ins	Always sent

Set your deadline reminder timing

1. **Open notification preferences**
   On the Notifications page, select **Preferences** at the top.
2. **Choose when reminders arrive**
   Under **Deadline reminder timing**, tick any of **7 days before**, **3 days before**, **2 days before**, **1 day before** and **On the day** (7:00 AM ET). Three days and one day before are the defaults.
3. **Pause email without losing anything**
   Pause all emails stops non-security email while notifications keep arriving in the app. Every email also has a one-click unsubscribe for that kind of email.

> **Tip:** RFP Detector sends no notification texts. Your mobile number receives verification codes only. More on preferences in Notification preferences.

The **Inbox** holds conversations between your organization and others, such as a buyer who posted an RFP or a prime looking for a subcontractor. Folders are **All**, **Unread**, **Requests**, **Sent** and **Archived**. Messaging is connection-based: a request opens the conversation, and messaging starts once it is accepted (you can add a reply when you accept). If a request is declined, the sender can try again after 30 days. You can archive, mute or report a conversation. Press **Enter** to send and **Shift Enter** for a new line.

SECTION 3.7

Reports: learning from wins and losses

Reports has two tabs. **Pipeline** turns your history into charts, each with a table view: a **Stage funnel** (RFPs saved in the range by the furthest stage reached), **Submissions and outcomes per month**, **Active pipeline by sector**, **Top categories** and **Loss reasons**, over 30 days, 90 days or 12 months. Win rate is won divided by won plus lost. **RFP reports** lists the PDF report for every tracked RFP and your team's **Download history**.

SECTION 3.8

A weekly bid tracking routine

Thirty minutes, once a week (most teams use Monday)

5 min — Clear Needs attention
On Home, open each count in **Needs attention**: due within 72 hours, amended since your last visit, past internal due date, without an owner.

10 min — Triage new matches
Open **New for you** and the latest alert digests. Save what deserves a look; ignore the rest.

10 min — Move every card
On **Pipeline**, move each Saved card to Qualifying or No bid, confirm owners and internal due dates, and add checklist steps for anything in Preparing.

5 min — Record outcomes and check the calendar
Mark Submitted, Won and Lost with their details, then scan the next two weeks in **Calendar**, **Agenda**.

Printable weekly bid review

CHECKLIST · 8 ITEMS

- [ ] Every tracked RFP has an owner
- [ ] Every RFP in Qualifying or Preparing has an internal due date
- [ ] Mandatory pre-bid meetings and site visits are on someone's calendar
- [ ] Question deadlines for active bids are known and assigned

- [ ] Amended RFPs were re-read and the notes updated
- [ ] Saved column reviewed: each card moved to Qualifying or No bid
- [ ] Outcomes and loss reasons recorded for last week's decisions
- [ ] Noisy or silent alerts adjusted

Frequently asked questions

How do I track bid deadlines in RFP Detector?

Save the RFP, then open its details panel and set an owner and an internal due date. Its due date, question deadline and pre-bid meeting appear in **Calendar**, deadline reminders go to the owner, and Home flags anything due within 72 hours. Subscribe to the private calendar feed to see the same dates in your own calendar app.

What's the difference between Saved and Pipeline?

They show the same RFPs. **Saved** is a filterable table of everything your organization tracks, including closed and finished items. **Pipeline** is a board (or table) of stages, from Saved through Qualifying, Preparing and Submitted to Won, Lost and No bid, where you move RFPs toward a decision.

How often do RFP alerts send?

You choose per alert: **Instant** (as new RFPs are added, at most hourly), **Daily** at 7:00 AM Eastern, or **Weekly** on Mondays at 7:00 AM Eastern. Each RFP is sent once per alert, and no email is sent when nothing new matches.

Can I get alerts or reminders by text message?

No. RFP Detector sends notifications in the app and by email. Your mobile number is used only for verification and security codes.

How do I add RFP deadlines to Outlook or Apple Calendar?

On the **Calendar** page, select **Create private feed link** in the Subscribe card and copy it. In Outlook choose **Add calendar**, then **Subscribe from web**, and paste it; in Apple Calendar, use the webcal link shown. Calendar apps refresh on their own schedule, often every few hours.

Who receives deadline reminders?

The owner of each pipeline item in the Saved, Qualifying or Preparing stage. Unassigned RFPs don't trigger personal reminders, which is why Home lists items without an owner. Each person sets their own reminder timing in notification preferences.

Q How do I stop alert emails without deleting the alert?

Switch the alert's **Active** toggle off (or choose **Pause** from its menu), or edit it and turn off **Email me** so matches only appear in the app. To pause all non-security email at once, use **Pause all emails** in notification preferences.

→ RELATED GUIDES

Searching RFPs and reading RFP Detector scores
Chapter 2: find and save the right RFPs
rfpdetector.com/guides/how-to-use-rfp-detector/searching-rfps-and-reading-scores

Building a vendor profile buyers can find
Chapter 4: let buyers come to you
rfpdetector.com/guides/how-to-use-rfp-detector/building-your-vendor-profile

Account security, teams and settings
Chapter 7: invite the people who own bids
rfpdetector.com/guides/how-to-use-rfp-detector/account-security-and-team-settings

Bid/no-bid decision framework
Decide what leaves the Saved column
rfpdetector.com/guides/how-to-find-government-contracts/bid-no-bid-decision-framework

Bid management templates and checklists
Calendars, trackers and checklists to pair with your pipeline
rfpdetector.com/guides/proposal-templates/bid-management-templates-and-checklists

How to read and shred an RFP
What to do in the Qualifying stage
rfpdetector.com/guides/how-to-write-a-winning-proposal/how-to-read-and-shred-an-rfp

Find RFPs to track
rfpdetector.com/search

END OF CHAPTER 3

Next: 04 Building a Vendor Profile Buyers Can Find

04

CHAPTER 4

Building a Vendor Profile Buyers Can Find

A field-by-field guide to the free RFP Detector vendor listing: turning on the Vendor workspace, the listing editor, branding, services and NAICS codes, service area, contact privacy, past performance, publishing, completeness, and how buyers actually search the vendor directory.

14 min read · 11 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- The vendor listing is free and there is no paid or sponsored placement. The directory ranks by search relevance, then completeness, then recency.
- Five things are required to publish: company name, tagline, an About section of at least 100 characters, one category and a service area.
- Completeness is nine equally weighted items, from logo and banner to three services, NAICS codes, a public contact method, past performance and a certifications answer.
- You control what is public. Email and phone appear only if you choose, are revealed on click, and buyers can always reach you with **Connect**.
- Certifications and company facts are self-reported and labeled that way. Keep them accurate; buyers confirm eligibility with the certifying agency.

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4.2 Turning on the Vendor workspace 50
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A strong vendor profile is a sales asset that works while you sleep. Buyers searching RFP Detector's vendor directory filter by what you do, where you work and the sectors you serve, then contact you directly. This chapter takes you through every field of the free vendor listing, shows what buyers see, and explains how the directory ranks profiles, so yours is complete, credible and easy to find. It also feeds your **Fit** score, so a good listing improves the RFPs you are shown.

SECTION 4.1

Why a vendor profile matters

Public buyers and large prime contractors run market research before they buy: they look for capable firms by service, code, location and certification. A vendor profile puts your answers in one public place. On RFP Detector the same listing does three jobs: it gets you found in the directory, it brings buyers and partners to your inbox through **Connect**, and it tunes the RFPs ranked for you.

Free
Listing and publishing
No paid or sponsored placement exists

5
Fields required to publish
Name, tagline, About, category, service area

9
Items in the completeness score
Each worth an equal share

⚠ WARNING **A listing is not a government registration**

Publishing on RFP Detector does not register you with any government buyer. Most public contracts also require the buyer's own registration, such as your federal entity registration and Unique Entity ID (UEI), the NYS vendor ID, NYC PASSPort, NJSTART or CTsource. See Getting bid-ready before you register. Registration requirements change, so confirm them with each agency.

SECTION 4.2

Turning on the Vendor workspace

Get to the listing editor

1. **Turn on the workspace**
   If you chose **List my company** at sign-up or ticked the vendor option during onboarding, it's already on. Otherwise an owner or admin opens **Settings**, **Organization** and switches on **Vendor workspace**. It's free and immediate.

2. **Open Vendor in the left rail**
   Vendor overview shows your listing status, completeness and analytics. Select **Edit listing**.

3. **Start editing**
   The **Listing editor** opens with a draft created for you. Your listing stays private until you publish it. Any member of the organization can edit and publish.

> **Tip:** If your organization already has a logo (**Settings**, **Organization**, **Logo**), the listing displays it until you upload one. Upload a logo in the listing's **Branding** section to tick that completeness item.

SECTION 4.3

A tour of the listing editor

The editor has a section list on the left, the form in the middle and, on wide screens, a **Live preview** on the right that shows exactly what visitors will see as you type (on smaller screens, select **Preview**). The toolbar shows the status (**Draft**, **Published** or **Hidden by admin**), whether changes are saved, a **Complete** meter, **Save now**, **View public** once published, and **Publish** or **Unpublish**.

> **TIP** **Autosave**
> The editor saves about five seconds after your last change and whenever you leave a field. Press **Cmd+S** or **Ctrl+S** to save immediately. Once your listing is published, saved edits go live right away, with no review step.

TABLE Editor sections

Section	What you fill in	Public?
Basics	Company name, profile address, tagline, About	Yes
Branding	Logo, banner, brand color	Yes
Contact	Website, email, phone, contact person, headquarters	Only what you choose
What you do	Categories, services and capabilities, NAICS codes, sectors served	Yes
Where you work	Nationwide, Remote, states you serve	Yes
Matching (Fit)	Keywords, exclude keywords, PSC codes, contract size	No, private
Company facts	Team size, year founded, UEI, CAGE code, certifications	Yes, marked Self-reported
Past performance	Projects you delivered	Yes, marked Self-reported
Links and Work samples	Company pages elsewhere; up to 12 captioned photos	Yes
Publish	What's still required, publish and unpublish	n/a

SECTION 4.4

Basics and branding: name, tagline, About, logo and banner

TABLE Basics and branding fields

Field	Rules	Advice
Company name	At least 2 characters	Your legal or trade name, exactly as on your registrations.
Profile address	3–60 lowercase letters, numbers and dashes; availability is checked as you type	Use your company name. Changing it after publishing keeps the old address working through a redirect.
Tagline	Up to 120 characters; shown on your directory card	Say what you do and for whom in one line.

Field	Rules	Advice
About	At least 100 characters to publish, 300+ for a complete profile, up to 5,000; supports bold, italic, lists and links	Who you are, who you work for, what you're good at, and proof.
Logo	JPEG, PNG, WebP or GIF; at least 200×200; up to 2 MB; no SVG	A square version of your logo on a plain background.
Banner	JPEG, PNG, WebP or GIF; 1600×400 recommended; up to 5 MB; no SVG	A real photo of your team or work. Without one, a pattern in your brand color is used.
Brand color	A hex value such as #1f6feb	Text colors are checked for contrast automatically; without a color, RFP Detector blue is used.

WORKED EXAMPLE

Weak tagline

✕ WEAK

> *Excellence in every project. Your trusted partner for quality solutions.*
>
> It names no service, no customer and no place, so it matches no searches and tells a buyer nothing.

WORKED EXAMPLE

Strong tagline

✓ STRONG

> *Janitorial and facility services for schools, public housing and municipal buildings across NYC and Westchester.*
>
> Service, customer type and geography in 112 characters, using the words buyers type.

TEMPLATE

About section template

Copy-ready online

A four-paragraph About section that clears the 300-character completeness bar and reads well on the public profile.

WHEN TO USE When you first write your listing, and whenever you win a contract worth mentioning.

[COMPANY NAME] is a [CITY, STATE]-based [TYPE OF BUSINESS] providing [CORE SERVICE 1], [CORE SERVICE 2] and [CORE SERVICE 3] to [CUSTOMER TYPES, E.G. SCHOOL DISTRICTS, MUNICIPAL AGENCIES AND PROPERTY MANAGERS] across [SERVICE AREA]. Founded in [YEAR], we have [NUMBER] employees and [ONE RELEVANT CREDENTIAL, E.G. A LICENSE OR CERTIFICATION].

What we do best: [ONE OR TWO SENTENCES ON YOUR STRONGEST CAPABILITY AND HOW YOU DELIVER IT].

Recent work includes [PROJECT 1 WITH CLIENT TYPE AND RESULT] and [PROJECT 2 WITH CLIENT TYPE AND RESULT].

Why buyers choose us: [DIFFERENTIATOR 1, E.G. 24-HOUR EMERGENCY RESPONSE], [DIFFERENTIATOR 2] and [DIFFERENTIATOR 3]. To discuss a project, use Connect or contact [CONTACT NAME, TITLE].

FIELDS TO FILL IN · 5

[CORE SERVICE 1–3]	Use the same words as your Services entries and the RFPs you target.
[CUSTOMER TYPES]	The buyers you sell to: agencies, schools, hospitals, primes, nonprofits.
[SERVICE AREA]	Match the states you select under Where you work.
[PROJECT 1 / PROJECT 2]	Only work you can describe publicly. Add the details under Past performance.
[DIFFERENTIATOR]	Concrete and checkable, not slogans. See the capability statement guide for ideas.

Your About section and capability statement should tell the same story. The **capability statement template** is a good source of core competencies and differentiators to reuse here.

SECTION 4.5

What you do: categories, services and NAICS codes

Fill in What you do

1 Pick one to five categories

Choose from the same category list used for RFPs, for example *Facilities, Maintenance & Janitorial* or *IT & Software*. Categories drive directory filters and your RFP matches. At least one is required to publish.

2 Add services and capabilities

Add up to 15 services, each with a name of up to 60 characters and an optional short description of up to 300. Reorder them with the arrows so your main service is first. Three or more count toward completeness.

> **Tip:** Name services the way buyers write scopes: *Day porter services*, not *Facility wellness solutions*.

3 Add your NAICS codes

Search by code or by words and add up to 20. Buyers filter the directory by NAICS, and a prefix search finds you (5617 matches 561720). Not sure which codes fit? See NAICS and commodity codes.

4 Choose sectors served

Tick Federal, State, Local, Education, Private and Non-profit as they apply. Buyers can filter by sector.

SECTION 4.6

Where you work: service area

Buyers filter the directory by state, so your service area decides which searches you appear in. Switch on **Nationwide** if you take work anywhere in the US (nationwide listings appear for every state), **Remote** if you can deliver remotely, or tick the **States you serve**. One of the three is required to publish, and it counts toward completeness.

> ✕ COMMON MISTAKE **Common mistake: ticking every state**
>
> If you can't staff a job in Ohio, don't list Ohio. Buyers who contact you and hear *we don't actually work there* remember it. A tri-state firm should list New York, New Jersey and Connecticut and say so in the About section.

SECTION 4.7

Contact details and privacy

The **Contact** section lets you choose exactly what is public. Email and phone are revealed only when a visitor clicks, and **Connect** always works, even if you publish no contact details at all. City and state always appear as your location.

TABLE **Contact fields**

Field	Public when	Tip
Website	Always, if filled in	Link to a page about your public-sector work if you have one.
Email	**Show email publicly** is on	Use a shared inbox such as bids@ so leads don't depend on one person.
Phone	**Show phone publicly** is on	A number that is answered during business hours.
Contact person and Their title	Shown with your contact details	The person who handles new business.
Headquarters (street, city, state, ZIP, country)	Full address only if **Show the full address publicly** is on	City and state are required and always shown.

A public contact method (a website, or a shown email or phone) is one of the nine completeness items. When a buyer selects **Connect**, they send a request of 20 to 1,000 characters that becomes the first message of a conversation in your **Inbox**; messaging opens when you accept. Managing those conversations is covered in **Notifications, email preferences and the inbox**.

SECTION 4.8

Company facts, certifications and past performance

Company facts are shown on your profile marked *Self-reported*: **Team size** (from 1–9 to 1,000+ employees), **Year founded**, **UEI** (12 letters or digits) and **CAGE code** (5 letters or digits), if you have them. Under **Certifications**, choose any you hold (Small business, 8(a), HUBZone, SDVOSB, VOSB, WOSB, EDWOSB, Indian Economic Enterprise, Indian Small Business Economic Enterprise, MBE, WBE, DBE), add others such as a state M/WBE certification in **Other certifications**, or tick **We hold none**. Answering, even with none, counts toward completeness.

> ⚠ WARNING **Self-reported means you're accountable**
>
> RFP Detector doesn't verify certifications, and your profile says so. List only certifications that are current. Misstating size or certification status in a real bid can carry serious penalties, so confirm your status with the certifying agency. See Small business and diversity certifications. This is general information, not legal advice.

Past performance holds up to 20 projects, each with a **Project** title, **Client or issuer**, optional **Year** and **Value**, and a **Description** of up to 600 characters. Lead with your most relevant work and describe scope, size and results. Writing project descriptions shows the formula. **Links** accepts your LinkedIn, X, Facebook, Instagram and YouTube pages. **Work samples** takes up to 12 photos of your work with captions of up to 140 characters.

WORKED EXAMPLE

Strong past performance entry

✓ STRONG

> **Project:** Nightly custodial services, 6 middle schools. **Client or issuer:** a Westchester County school district. **Year:** 2025. **Value:** $1,240,000. **Description:** Three-year contract covering 410,000 sq ft. Crews of 22 across two shifts, green-certified products, monthly inspection scores above the district's target in every quarter, renewed for option year one.

SECTION 4.9

Publishing and profile completeness

The **Publish** section lists what is still **Required to publish**: **Company name**, **Tagline**, **About (at least 100 characters)**, **At least one category** and **Service area**. When all five are done, select **Publish**. Publishing is free and immediate, and you get a *Vendor listing published* notification. You can **Unpublish** any time: the listing leaves the directory and its address returns *not found*, but your content stays saved.

The nine completeness items (each worth an equal share)

CHECKLIST · 9 ITEMS

- [ ] Upload a logo
- [ ] Upload a banner
- [ ] Write an About section of 300+ characters
- [ ] Add at least 3 services
- [ ] Add your NAICS codes
- [ ] Set your service area
- [ ] Show a public contact method
- [ ] Add a past performance entry
- [ ] Answer certifications (even “None”)

PRO TIP **Pro tip: completeness is a ranking factor**

The directory ranks profiles by search relevance first, then completeness, then how recently they were updated. Two equally relevant firms are separated by completeness, so reaching 100% is the cheapest visibility you will ever buy.

SECTION 4.10

How do buyers search the vendor directory?

Buyers use the public **vendor directory**, which shows published listings only. They type into a search box (company name, services, keywords), filter, sort, and open profiles. The **for buyers** page and the Buyer workspace add shortlists; that side is covered in **Finding vendors, shortlists and invitations**.

TABLE **Directory filters and what they read from your listing**

Directory filter	Reads from your listing
Search box	Company name, tagline, services and other text
Category	Your one to five categories
State or service area	Nationwide, Remote, or the states you serve
Sectors served	Your sectors served
NAICS code	Your NAICS codes (prefixes match)
Certifications	Your self-reported certifications
Company size	Your team size
Sort: Best match, Recently updated, Name A–Z	Relevance, then completeness and recency

How a buyer reaches you

01 **Search**
Service words, category, state

↓

02 **Directory card**
Logo, name, tagline, location

↓

03 **Profile**
About, services, past performance, certifications

↓

04 **Contact**
Connect, website, email or phone

↓

05 **Inbox**
You accept and the conversation starts

Your public profile shows a badge confirming your account verified an email address and a mobile number, your service area as state chips, your categories with links to open RFPs, and a **Connect** button that opens a conversation in your inbox for free. Prime contractors looking for subcontractors can search the same directory, which makes your listing useful for teaming opportunities too.

SECTION 4.11

Keeping your profile fresh and measuring results

Vendor overview shows how the listing performs over 7, 30 or 90 days: **Profile views** (bots and your own team excluded), **Search appearances**, **Contact clicks**, **Connection requests**, **RFP interests** and **Profile complete**, plus views by day, pending connection requests, **Matches for your listing** (open RFPs ranked by how well they fit you) and **How people reach you**, which breaks down contact clicks and the searches that showed your profile. **Leads** lists your connection requests and accepted connections. If your company also has a public contractor profile, the Vendor workspace lets you claim it and show its Contractor Score badge; see How to claim your company's contractor profile.

A simple upkeep calendar

Monthly — **Check the numbers**
Review search appearances and the searches that showed you. Add services or keywords for searches you should appear in but don't.

After every win — **Add past performance**
Add the project while the details are fresh, and a work-sample photo if the client allows it.

Quarterly — **Refresh the story**
Update the About section, services and team size. Recent edits help in the **Recently updated** sort.

When anything changes — **Keep facts consistent**
Certifications, address, UEI or CAGE changes should match your registrations everywhere. See Keeping profiles consistent.

Frequently asked questions

Q **Is the RFP Detector vendor listing free?**

Yes. Turning on the Vendor workspace, building the listing and publishing it are free, and publishing is immediate. There is no paid or sponsored placement in the directory.

Q **Can I pay to rank higher in the vendor directory?**

No. The directory ranks by search relevance, then profile completeness, then recency. The way to rank higher is a relevant, complete and recently updated profile.

Q **Who can see my email address and phone number?**

Only what you choose. Email and phone appear only when you switch on **Show email publicly** or **Show phone publicly**, and even then are revealed when a visitor clicks. City and state always show; the full street address only if you allow it. Buyers can always reach you with **Connect**.

Q **Does RFP Detector verify my certifications?**

No. Certifications and company facts are self-reported and labeled that way on your profile. Buyers are told to confirm eligibility with the certifying agency, so list only current certifications.

Q **How do buyers contact me?**

Through **Connect**, which sends a request that becomes the first message of a conversation in your Inbox (messaging opens when you accept), or through any website, email or phone you make public. You're notified of connection requests in the app and by email.

Q Does a vendor listing replace government vendor registration?

No. It is a marketing profile, not a registration. To bid, you usually also need the buyer's own registration, such as your federal entity registration and UEI, NYC PASSPort, NJSTART or CTsource. Requirements change, so check with each agency.

Q How do I unpublish or hide my listing?

Select **Unpublish** in the listing editor. The listing disappears from the directory and its address returns not found, but your content stays saved and you can publish again any time. Turning off the Vendor workspace also unpublishes it.

→ RELATED GUIDES

Researching contractors, competitors and incumbents
Chapter 5: Contractor Score and public contractor profiles
rfpdetector.com/guides/how-to-use-rfp-detector/researching-contractors-and-competitors

Tracking bids: pipeline, alerts and notifications
Chapter 3: manage leads and RFPs
rfpdetector.com/guides/how-to-use-rfp-detector/tracking-bids-pipeline-and-alerts

Capability statement templates
Reuse the same story buyers see on your profile
rfpdetector.com/guides/proposal-templates/capability-statement-templates

Small business and diversity certifications
Get certified before you list it
rfpdetector.com/guides/how-to-register-for-government-contracts/small-business-and-diversity-certifications

Past performance and references
Write entries evaluators trust
rfpdetector.com/guides/how-to-write-a-winning-proposal/past-performance-and-references

For vendors: list your company free
rfpdetector.com/for-vendors

Browse the vendor directory
rfpdetector.com/vendors

END OF CHAPTER 4

Next: 05 Contractor Research: Competitors, Incumbents and Teaming Partners

05

CHAPTER 5

Contractor Research: Competitors, Incumbents and Teaming Partners

How to use public contractor profiles, contract histories and the Contractor Score to size up competitors, find the incumbent, choose teaming partners and claim your own company's profile.

15 min read · 10 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- The **contractor directory** has a public profile for every organization with New York State contracts: contract history, agencies served and a Contractor Score.
- The Contractor Score (0 to 100) measures **public contracting activity on record**, not quality. Read the factor breakdown, not just the grade.
- The contracts table is the evidence: filter by agency and status, then open a row for the term, amount and spending.
- Use profiles to find the likely incumbent, judge how hard a rebid will be and shortlist teaming partners who already serve your target agency.
- Claim your company's profile free to add your logo, description and contacts and get a score badge. The score itself always comes from the public record.

IN THIS CHAPTER

5.1 What the contractor directory covers 63
5.2 How to find a contractor profile 63
5.3 Reading a contractor profile, section by section 64
5.4 What does the Contractor Score measure, and what doesn't it? 65
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Good contractor research tells you who you are really bidding against before you spend a week on a proposal. RFP Detector turns public contract records into searchable contractor profiles: who holds contracts, with which agencies, for how much, for how long and how active they are today. This chapter shows you how to use those profiles for competitor analysis, incumbent research and teaming, and how to read the Contractor Score without over-reading it.

> **TIP** **Before you start**
> Research needs no account: the contractor directory, every profile and the Contractor Score methodology are public. You need a free account only to claim a profile or send connection requests (see Getting Started).

SECTION 5.1

What the contractor directory covers

The contractor directory lists organizations that hold **New York State contracts**, built from public contract records. Each organization gets one profile however many name variants appear in the records, and each profile shows a **Records updated** date.

- **Organizations only.** Vendors listed under a person's own name get no public page and no score; their contracts still count in agency totals.
- **Company details when matched with confidence.** Legal name, website, UEI and CAGE code, industry codes, federal registration and federal award history appear only when the contractor is matched to a registered business, and only business contact information is shown.

SECTION 5.2

How to find a contractor profile

Find any contractor in under a minute

1. **Open the directory and search**
   Go to Contractors and type in **Search contractors by name**. Results update as you type. Use a distinctive word (“Hudson Valley”, not “Services Inc”).
2. **Sort the list**
   Choose **Contract value** (the default), **Contractor Score**, **Active contracts** or **Name A–Z**. Active contracts surfaces the companies doing the most work right now.

3 **Browse by agency, category, type or place**

Open **Browse by agency, category, type and place**. On an agency list, each contractor's figures are its contracts **with that agency**, which is exactly what incumbent research needs.

4 **Check the leaderboards**

Top contractors ranks organizations by Highest Contractor Score, Largest total contract value, Most active contracts, Most agencies served and Largest newer contractors.

> ☆ PRO TIP **Pro tip: start from the RFP, not the directory**
>
> Open an RFP from a New York State agency or education issuer in search and scroll below the details. **Top contractors for [agency]** lists the five contractors with the most contract value with that agency. That is your shortlist of likely competitors and possible incumbents.

SECTION 5.3

Reading a contractor profile, section by section

TABLE **What each part of a contractor profile tells you**

Section	What you see	Use it to
Header and headline figures	Badges, location, a summary sentence; Total contract value, Spent to date, Active contracts, Contracts on record, Agencies served, Years active	Confirm the company and gauge how much work is live
Contact & company	Legal name, UEI and CAGE, federal registration, federal award history, NAICS codes, certifications, leadership	Check identity, codes and certifications
Contracts	Every state contract, active first, with filters and expandable rows	Find the incumbent contract, its end date and spending
Contract-type mix and Contracts over time	Value by contract type; contracts started per year	See what kind of contractor it is and whether it is growing or quiet
How the Contractor Score adds up	Each factor's signed points from a base of 50	Understand why the score is what it is
Agencies served	Contract value with each agency (top 12)	See which buyers trust this company

Section	What you see	Use it to
Open RFPs from these agencies	Current RFPs from agencies it already serves	Find bids where you will likely meet it
Key facts	First contract, latest end date, records updated, profile completeness	Quick reference (completeness is separate from the score)

> **NOTE** **Certifications are shown, not scored**
>
> M/WBE, SDVOB and similar badges are for reference only and are not part of the score. Confirm current status with the certifying agency before relying on one. See certifications.

SECTION 5.4

What does the Contractor Score measure, and what doesn't it?

The Contractor Score is a 0 to 100 summary of a company's **public contracting record** with New York State agencies. Everyone starts at 50; eight factors add or subtract points, and the profile shows every contribution. It is computed the same way for every company, it is the same for every visitor, and nobody can pay to change it.

TABLE **The eight factors (version 1.0.0; full formula on the methodology page)**

Factor	Weight	What it looks at
Contract volume	25	Total current contract value, on a logarithmic scale
Recent activity	20	Contracts active today and how recently the latest was approved
Agency breadth	15	How many different agencies and facilities it serves
Experience	15	Years since the first contract on record
Contract-type mix	10	Number of contract types and the share of goods-and-services work
Spending vs. value	5	Spending on completed contracts vs. value; finishing under value is never a failure
Federal award history	6	Bonus only, when matched to a registered business
Federal registration	4	Bonus only: an active federal registration

TABLE **Grades and labels**

Score	Grade	Label
80–100	A	Extensive
65–79	B	Established
50–64	C	Moderate
35–49	D	Limited
0–34	F	Minimal

Each score carries a **data confidence** label: High (75 or more), Medium (50 to 74) or Low. Missing data contributes exactly zero, so gaps lower the confidence without moving the score. Scores are recomputed after every records refresh and at least weekly. Details are on the **methodology page**.

Reading the score the right way

The score is good for

- ✓ Gauging how much state contracting activity a company has
- ✓ Telling newer or quieter competitors from deeply established ones
- ✓ Asking better questions: why is Agency breadth low?

The score is not

- ✗ A rating of quality, safety or customer satisfaction
- ✗ An endorsement or a prediction of who will win
- ✗ A financial rating (contract value is not revenue)

✗ COMMON MISTAKE **Common mistake: treating a low grade as a weak competitor**

A D or F often means a company is new to state work or works mainly elsewhere. A national firm with two state contracts can score below a local firm with forty. Check the federal award history before you decide a competitor is small.

SECTION 5.5

Reading the contracts table and charts

The contracts table lists every contract with New York State agencies, active first, and gains columns on wider screens: Contract, Agency, Type, Contract no., Start, End, Amount and Spent.

Filter the table to answer one question

1. **Pick a status**
   Use **All**, **Active** or **Ended**. Active means the end date is today or later.
2. **Narrow to one agency and type**
   Choose your target buyer in **All agencies** and, if needed, a contract type in **All types**.
3. **Search the descriptions**
   Type a keyword in **Search contracts** (“help desk”, “HVAC”) to find the contract that matches your RFP.
4. **Open the row**
   Click a contract for the full description, contract number, term and length, approval date, status, amount and spent to date as a percentage.

Glossary

Spent to date	Spending recorded against the contract so far. Finishing under the full value is common and normal.
Term	Start to end date. Many contracts have renewal options, so the end date on record is the current one, not necessarily the last.
Incumbent / recompete	The company holding the current contract, and the new solicitation that rebids that work.

Contract-type mix shows where a company's value sits (mostly grants is a different competitor from mostly services). **Contracts over time** shows contracts started each year: a rising line means momentum, a flat recent stretch can mean a company shifting away from state work.

SECTION 5.6

How to research an incumbent before you bid

Incumbent research answers three questions: who does this work today, how strong is that relationship, and when will it be bid again. For the strategy side, pair this with **competitor and incumbent analysis**.

Incumbent research in five steps

1. **Read the RFP's background section**
   Rebids often name the current contractor, the prior contract number or a transition requirement.

2. **List the agency's top contractors**
   Use **Top contractors for [agency]** on the RFP page, or the agency's full list in the directory.

3. **Find the matching contract**
   On each likely profile, filter to the agency and **Active**, and search for the service. The contract whose description and term match is your probable incumbent.

4. **Read the term, spending and relationship**
   An end date 6 to 12 months out suggests a rebid is near; spending close to the amount means the value is mostly used. A ten-year, multi-contract relationship is harder to displace than a first award.

   > **Tip:** Dates are signals, not promises: renewals, extensions and bridge contracts are common. Confirm timing with **procurement forecasts**.

5. **Score it**
   Feed incumbent strength into the **weighted bid/no-bid matrix**.

WORKED EXAMPLE

Worked example: a help desk rebid (hypothetical)

✓ STRONG

A 25-person Albany IT firm finds a state agency RFP for help desk support. One of the top contractors holds an active “Help desk and desktop support” contract with that agency: four years old, ending in seven months, 91% spent, plus two other active contracts there and a B grade.

Verdict: a real, well-connected incumbent on a mature contract. The firm still bids, but builds a strong transition plan, asks about service levels in the Q&A window and leads with its faster response times as a discriminator.

NOTE **Going deeper on a public contract**

Public contracts are generally public records. To see an incumbent's contract terms or a past winning proposal, ask the agency through a public records request (in New York, a Freedom of Information Law request); trade secrets may be withheld. General information, not legal advice.

SECTION 5.7

Building a competitor profile you can reuse

You will meet the same five to ten competitors again and again. A one-page profile for each, updated quarterly, beats a fresh scramble before every deadline. Fill it from the contractor profile, the company's website, pre-bid meetings and debriefs.

TEMPLATE

Competitor profile worksheet

Copy-ready online

A one-page record per competitor, built from their contractor profile and your notes.

WHEN TO USE For every company in the Top contractors list of your target agencies. Update it each quarter and after every debrief.

COMPETITOR PROFILE: [COMPANY NAME]
Last updated: [DATE] by [YOUR NAME]
Profile link: [PROFILE LINK]

1. IDENTITY
Location: [CITY, STATE] In business since: [YEAR]
NAICS codes: [CODES]
Certifications shown (verify with certifier): [CERTIFICATIONS]

2. STATE CONTRACTING RECORD
Contractor Score: [SCORE] ([GRADE], [LABEL]), confidence [LEVEL]
Total contract value: [AMOUNT] Active contracts: [NUMBER]
Top agencies: [AGENCY 1], [AGENCY 2], [AGENCY 3]
Federal award history: [AMOUNT OR NOT SHOWN]

3. CONTRACTS THAT OVERLAP WITH OUR WORK
[DESCRIPTION] | [AGENCY] | ends [END DATE] | [AMOUNT] | [PERCENT] spent
[DESCRIPTION] | [AGENCY] | ends [END DATE] | [AMOUNT] | [PERCENT] spent

4. OUR READ
Likely strengths: [STRENGTHS]
Likely gaps: [WEAKNESSES]
Our discriminators: [DISCRIMINATORS]
Would we team with them? [YES/NO AND WHY]

5. RFPS WHERE WE EXPECT TO MEET THEM
[RFP TITLE] due [DATE]

FIELDS TO FILL IN · 5

[PROFILE LINK]	Copy the profile address from your browser so teammates open the same page.
[SCORE] ([GRADE], [LABEL])	From the Contractor Score card, for example 72 (B, Established), plus the confidence label.
[PERCENT]	Spent to date as a share of the amount, from the expanded contract row.
[DISCRIMINATORS]	Provable differences: certifications, response times, local staff, a method the competitor lacks.
[STRENGTHS] / [WEAKNESSES]	Facts first (relationships, history), then debrief notes. Never infer quality from the score.

Each profile's **Open RFPs from these agencies** list shows bids where you are likely to meet that competitor. Save them to your pipeline (see **Tracking Bids**) and plan your pricing with **price to win**.

SECTION 5.8

Finding teaming partners and subcontractors

The profiles that show you competitors also show you partners: a company that already serves your target agency brings past performance, and one with the certification or specialty the RFP asks for fills a gap. Use both directories.

TABLE **Two places to find partners**

	Contractor directory	Vendor directory
Where	Contractors	Vendors
What it is	Public contract history for organizations with state contracts	Free listings companies publish themselves, any sector or state
Filter by	Name, agency, category, contract type, place	Services, category, service area, sectors, NAICS, certifications, company size

	Contractor directory	Vendor directory
How to reach them	Contact & company panel, when details are confirmed	The **Connect** button (a request to their inbox)

Find and approach a teaming partner

1. **Define the gap**
   Name exactly what you lack: agency past performance, a license, a certification goal, a region or a specialty.

2. **List who serves the agency**
   Open the agency's contractor list and sort by **Active contracts**. Check each profile's NAICS codes, certifications and Contracts over time.

3. **Search capabilities**
   In **Vendors**, filter by category, service area and certification. A NAICS prefix works: 5617 matches 561720.

4. **Send a connection request**
   On the vendor's profile press **Connect** and write 20 to 1,000 characters naming the RFP and the role. Messaging opens when they accept, and replies arrive in your inbox.

> **Tip:** You must be signed in with an organization. If you belong to several, pick which one you send as.

TEMPLATE

Teaming connection request

Copy-ready online

A first message that fits the 1,000-character Connect box.

WHEN TO USE When you have a specific RFP and role in mind, at least two to three weeks before the due date.

Hello [CONTACT NAME],

I'm [YOUR NAME], [YOUR TITLE] at [YOUR COMPANY]. We are preparing a response to [RFP TITLE] from [AGENCY], due [DUE DATE].

Your work with [AGENCY OR SIMILAR BUYER] and your [CAPABILITY OR CERTIFICATION] stood out. We would like to discuss a [SUBCONTRACT / TEAMING] role covering [SCOPE AREA], about [SHARE OF WORK].

We would lead [YOUR PART OF THE SCOPE] and bring [YOUR KEY STRENGTH].

Could we talk for 20 minutes this week? Reply here or call [YOUR PHONE].

Thank you,
[YOUR NAME]

FIELDS TO FILL IN · 2

[CAPABILITY OR CERTIFICATION]	Why you chose them: a contract on their profile, a certification, a service area.
[SHARE OF WORK]	An honest estimate, for example “about 25% of the labor” or “all electrical work”.

⚠ WARNING **Participation goals: verify before you count**

Many New York State contracts set M/WBE goals per contract, and only state-certified firms count. Confirm certification in the state's official directory of certified firms and follow the solicitation's utilization plan rules. For structures, see **teaming agreements, joint ventures and mentor-protégé**. Rules change; confirm with the agency or a qualified advisor.

SECTION 5.9

How to claim your company's contractor profile

If your company holds New York State contracts, it probably has a profile. Claiming is free: it adds a **Claimed** badge, shows your vendor listing details (logo, description, contacts) first and turns on your Vendor workspace. It does **not** change your Contractor Score.

Claim a profile

1. **Press Claim this profile**
   Open your profile from Contractors and press **Claim this profile** in the **Is this your company?** card. Signed out? Create a free account or sign in; the app then reminds you to **Finish claiming**.
2. **Verify with a company email**
   If the profile shows a company website, enter any address at that domain, press **Send code**, then enter the 6-digit code and press **Verify and claim**. The code works for 30 minutes.
3. **Or ask for a review**
   No email at that domain? Use **Ask for a review**: give your role and how the team can confirm you represent the company. Claims are reviewed by hand and you are emailed the decision.
4. **Finish your listing**
   Edit your logo, description and contacts in the listing editor (see Building Your Vendor Profile).
5. **Add your score badge**
   On the Vendor overview, follow the notice **Add your Contractor Score badge to your website** to the Contractor profile & badge page, then press **Copy HTML** for the light or dark version. The badge links to your profile, updates with your score (cached for a day) and has no script or tracking.

Claim troubleshooting

CHECKLIST · 4 ITEMS

- [ ] **Vendor workspace off?** Only owners and admins can claim, because claiming turns it on.
- [ ] **Already claimed by another organization?** Use Ask for a review and explain why it is yours.
- [ ] **Code expired or too many wrong tries?** Send a new code.
- [ ] **Someone else's contract on your profile?** Use the contact form with the Data correction topic.

SECTION 5.10

Common contractor research mistakes

Do	Don't
✓ Start from a specific RFP and its agency	✗ Judge quality from the Contractor Score
✓ Filter by agency and status before concluding	✗ Assume an end date is the rebid date
✓ Verify certifications at the source	✗ Ignore federal, city and private work
✓ Keep a reusable profile per repeat competitor	✗ Approach partners with no RFP in hand

Frequently asked questions

Q How do I find out who currently holds a government contract?

Read the RFP's background section, which often names the current contractor. Then check **Top contractors for [agency]** on the RFP page, open the likely profiles, filter the contracts table to that agency and **Active**, and search for the service. The contract whose description and term match is your probable incumbent.

Q What is the RFP Detector Contractor Score?

A 0 to 100 summary of a company's public contracting activity with New York State agencies. It starts at 50; eight factors (volume, recent activity, agency breadth, experience, contract-type mix, spending vs. value, plus federal bonuses) add or subtract points. Grades run from A (Extensive) to F (Minimal). See the methodology.

Q Does a high Contractor Score mean a company does good work?

No. It measures how much public contracting activity is on record, not quality, safety or customer satisfaction. It is not an endorsement or a prediction of who will win.

Q Can I change my company's Contractor Score?

Not directly. It comes from the public record, is calculated the same way for everyone and can't be bought. It changes as your real contracting activity changes and is recomputed at least weekly. Report a wrong record through the contact form.

Q How do I claim my company's contractor profile?

Open it from **Contractors**, press **Claim this profile**, sign in or create a free account, then verify with a 6-digit code sent to an address at your company's website domain, or ask for a manual review. Claiming is free.

Q Why can't I find a company in the contractor directory?

Profiles cover organizations with New York State contracts. Companies that work only for cities, the federal government or private clients may not have one, and vendors listed under a person's own name get no page. Try a shorter name, then check the **vendor directory**.

→ KEEP GOING

Posting RFPs and Finding Vendors as a Buyer
Next chapter: the buyer portal
rfpdetector.com/guides/how-to-use-rfp-detector/posting-rfps-as-a-buyer

Capture Planning and Win Themes
Turn research into discriminators
rfpdetector.com/guides/how-to-write-a-winning-proposal/capture-planning-and-win-themes

Subcontracting and Teaming Opportunities
Prime vs. sub and teaming structures
rfpdetector.com/guides/how-to-find-government-contracts/subcontracting-and-teaming-opportunities

Contractor Score methodology
Every factor, weight and curve
rfpdetector.com/methodology/contractor-score

Contractor directory
Search every New York State contractor
rfpdetector.com/contractors

Vendor directory
Find partners by capability
rfpdetector.com/vendors

END OF CHAPTER 5

Next: 06 How to Post an RFP and Find Vendors as a Buyer

06

CHAPTER 6

How to Post an RFP and Find Vendors as a Buyer

A complete walkthrough of the RFP Detector buyer workspace: setting up your buyer profile, posting an RFP field by field, tracking interest, inviting vendors, and amending, closing and awarding.

14 min read · 9 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- Any organization with a verified account can turn on the free Buyer workspace and post RFPs: companies, nonprofits, schools and public agencies.
- The editor has eight sections; drafts save automatically and stay private until you press **Publish**, which makes the RFP live immediately.
- Every published RFP gets a public page, an RFP Detector Score and a downloadable report. Complete details score higher on Clarity & completeness.
- Interested parties (organizations that save your RFP or press **I'm interested**) appear in your workspace live; you can connect, message and export them.
- After publishing you can amend, extend, close, record an award or cancel. Amendments are logged publicly and every interested party is notified.

IN THIS CHAPTER

6.1 Set up the Buyer workspace and your buyer profile 77
6.2 A tour of the buyer workspace 78
6.3 How to post an RFP, field by field 78
6.4 How do you write a scope and evaluation criteria vendors can respond to? 80
6.5 Setting dates, questions and pre-bid meetings 82
6.6 Previewing, scoring and publishing 83
6.7 Tracking views, interested parties and analytics 84
6.8 Finding vendors, shortlists and invitations 84
6.9 Amendments, extensions, closing and awarding 87

Learning how to post an RFP is only half the job; the other half is getting it in front of the right vendors and running a fair, well-documented process. RFP Detector's buyer workspace handles both: a guided form for posting an RFP, a public page with a score and a report, live interest tracking, a searchable vendor directory, and amendments and awards that notify everyone who is following. Posting, analytics, interested parties and vendor search are free, for you and for bidders.

> ⚠ **WARNING** **Before you start**
>
> Public agencies and grant-funded organizations must follow their own procurement rules, including any legally required advertising, minimum number of quotes and award procedures. Posting on RFP Detector widens your reach; it does not replace those obligations. This is general information, not legal advice; confirm with your procurement office or counsel.

SECTION 6.1

Set up the Buyer workspace and your buyer profile

From account to ready-to-post in about five minutes

1. **Create and verify your account**

   Sign up and verify your email and mobile number (see Getting Started).

2. **Turn on the Buyer workspace**

   Open **Settings** from the left rail, choose **Organization**, and under **Workspaces** switch on **Buyer workspace**. Only owners and admins can do this. **Buyer** then appears in your left rail.

3. **Fill in Issuer details**

   The first visit opens **Set up your buyer profile**. Enter the **Issuer name** (defaults to your organization), **Sector** (Federal, State, Local, Education, Private or Non-profit; your RFPs appear in that sector's hub), **Issuer type** (for example Company, Non-profit organization, City or town, School district), and optionally city, state, website and an **About** paragraph of up to 1,000 characters.

4. **Set the default contact and logo**

   Add a **Default contact** (name, title, email, phone). It prefills every new RFP and is shown publicly, so use a shared procurement mailbox if you have one. Press **Create buyer profile**, then upload a logo.

> 💡 **Tip:** Every RFP inherits these details, and they appear on your public issuer page. Changes apply to RFPs you post from then on.

SECTION 6.2

A tour of the buyer workspace

TABLE The six tabs across the top of the buyer workspace

Tab	What it's for
Overview	Views, report downloads, saves, new interested parties and connections for the last 7, 30 or 90 days, plus a **Needs attention** list: RFPs closing in 3 days or less, interested parties you haven't viewed, pending connection requests and unpublished drafts
My RFPs	Every RFP you posted, filtered by All, Draft, Open, Closing soon, Closed, Awarded or Cancelled, with score, due date, views, interest and report downloads
Interested parties	Organizations that saved one of your RFPs or pressed I'm interested, across all RFPs
Find vendors	Search the vendor directory, shortlist vendors and invite them to an RFP
Shortlists	Named, private lists of vendors with notes
Buyer profile	The issuer details every RFP inherits

SECTION 6.3

How to post an RFP, field by field

Press **Post an RFP** on the Overview. The editor is one long form with a section list on the left (a check mark appears as each section is complete) and a **Preview & publish** panel on the right. Drafts save automatically a moment after you stop typing, and nothing is public until you publish.

The eight sections of the RFP editor

01 **1. Basics**
Title, type, categories, NAICS, summary

↓

02 **2. Scope**
Description, lists, evaluation criteria

↓

03 **3–4. Budget & place, Dates**
Value range, location, deadlines

↓

04 **5–6. How to respond, Contact**
Submission method and questions contact

↓

05 **7–8. Attachments, Visibility**
Documents and Public or Unlisted

TABLE **Every field and its rules (required fields in bold)**

Section	Fields	Rules and tips
Basics	**Title**, Notice type, Reference number, **Primary category**, two secondary categories, NAICS code, Short summary	Title 10–200 characters, saying what and where. Notice types: RFP, RFQ, RFI, IFB, Sources sought, Call for proposals. Summary up to 300 characters; leave it blank and RFP Detector writes one, labeled “Summary by RFP Detector”
Scope	**Description**, Deliverables, Eligibility, Requirements, Evaluation criteria	Description 200–20,000 characters with Markdown (Write and Preview tabs). Lists hold up to 30 items each and can be reordered. Criteria weights are whole percentages totalling 100% or less
Budget & place	Budget (**State a range** or **Not disclosed**), Work can be done remotely, city, state, Contract term	Not disclosed shows “Not stated”. Remote shows instead of a place of performance

Section	Fields	Rules and tips
Dates	**Responses due** date and time, Time zone, Questions due, Pre-bid meeting, Anticipated award date	Due date must be in the future. Questions and the pre-bid meeting must come before it. Pre-bid has a location or meeting link and an **Attendance is mandatory** switch
How to respond	**Submission method** and its target, Instructions	Email (an address), Upload at a URL (a full https address), Mail or hand delivery (an address) or Other. Instructions up to 2,000 characters
Contact	Name, Title, Email, Phone	Prefilled from your profile; **Use buyer profile contact** restores it. Shown publicly
Attachments	Up to 10 documents with display names	Drop files or browse; reorder with the arrows. Each download is counted in analytics
Visibility	**Public** or **Unlisted**	Public: listed in search, hubs and alerts and indexed. Unlisted: only people with the link. Both get a page, score and report

> NOTE **Proposals don't come through RFP Detector**
>
> Vendors respond the way you set in **How to respond**: by email, at your upload link, by mail or as you describe. RFP Detector counts clicks on that link (**Submit clicks**) but does not collect or open proposals.

SECTION 6.4

How do you write a scope and evaluation criteria vendors can respond to?

Vague RFPs get fewer, weaker and more expensive responses. Public procurement rules generally require you to state your evaluation factors and their relative importance before proposals arrive (federal rules and New York's State Finance Law both say so), and it is good practice for private buyers too. Vendors decide whether to bid in minutes; give them what they need on the first screen.

TEMPLATE

RFP description outline (paste into the Description field)

Copy-ready online

A structure for the Scope description. The ### lines become headings on your public page.

WHEN TO USE For any RFP, RFQ or call for proposals. Delete headings that don't apply, and move eligibility and requirements into their own list fields.

Background
[ORGANIZATION NAME] is a **[TYPE OF ORGANIZATION]** serving **[WHO YOU SERVE]** in **[AREA]**. We are seeking **[WHAT YOU ARE BUYING]** because **[WHY NOW]**.

Scope of work
- **[TASK 1, WITH QUANTITY OR FREQUENCY]**
- **[TASK 2]**
- **[TASK 3]**

Locations and schedule
Work takes place at **[SITES OR REMOTE]**. Service hours: **[HOURS]**. Expected start: **[START DATE]**.

Current situation
[WHAT EXISTS TODAY: CURRENT VENDOR OR IN-HOUSE, VOLUMES, SYSTEMS]

What your proposal must include
1. **[ITEM, WITH PAGE LIMIT]**
2. Pricing in the attached form (**[ATTACHMENT NAME]**)
3. **[NUMBER]** references from comparable work

How we will evaluate
Award goes to the proposal that offers the best value under the criteria and weights listed in this RFP.

Terms
Contract term: **[TERM]**. Insurance: **[REQUIREMENTS]**. Payment: **[TERMS]**.

FIELDS TO FILL IN · 3

[WHY NOW]	One sentence of context (contract ending, new program, growth) helps vendors judge fit.
[TASK 1, WITH QUANTITY OR FREQUENCY]	Measurable: “clean 40,000 sq ft nightly, five nights a week”, not “cleaning services”.
[WHAT EXISTS TODAY]	Volumes, systems and the current arrangement let vendors price accurately.

Weak vs. strong RFP details

Strong

- Title: “Janitorial services for six residential sites in the Bronx”
- Criteria: Technical approach 40%, Price 30%, Experience 20%, References 10%
- Budget range stated, or a clear reason it isn't
- Questions due ten days before responses, answered by amendment

Weak

- Title: “Services RFP 2026-14”
- Criteria: “Best value as determined by the organization”
- No quantities, sites or service hours
- One contact phone number and no question deadline

SECTION 6.5

Setting dates, questions and pre-bid meetings

Dates show publicly in the time zone you choose (Eastern through Chamorro Time). Give vendors enough time to ask questions, get answers and still write a proposal. The schedule below is a common pattern, not a rule; follow your own policy and any legal minimums.

Example 30-day schedule (hypothetical)

Day 0 — Publish
The RFP goes live with documents attached and a named contact.

Day 7 — Pre-bid meeting
Set in **Pre-bid meeting**; switch on **Attendance is mandatory** only if a site walk is essential.

Day 14 — Questions due
Set in **Questions due**. It must be before the response deadline.

Day 18 — Answers posted
Post answers as an amendment with a clear “What changed” note so every interested party is notified.

Day 30 — Responses due
Your **Responses due** date and time. Vendors see a countdown.

SECTION 6.6

Previewing, scoring and publishing

Publish with confidence

1. **Clear the required items**
   The **Preview & publish** panel lists what is left (for example “Set the due date and time”). Pressing **Publish** early jumps you to the first problem.
2. **Work through Details vendors look for**
   The panel's checklist (below) flags optional details that make RFPs clearer and score higher on **Clarity & completeness**.
3. **Watch the live score**
   Once required fields are complete, an **RFP Detector Score** preview appears. The published score is computed when you publish and is the same for every visitor; nobody can buy or edit it. See how the score works.
4. **Preview**
   Press **Preview** to see the page as vendors will. Nothing is public yet.
5. **Publish**
   Press **Publish**. It goes live immediately with no approval step, and you land on the RFP's manage page. You also get an **RFP published** confirmation with the public link.

Details vendors look for

CHECKLIST · 7 ITEMS

- [ ] Attach the solicitation documents
- [ ] Add a contact email or phone
- [ ] Add a NAICS code
- [ ] Add your reference number
- [ ] State a budget range
- [ ] Describe the work in 300+ words
- [ ] List the evaluation criteria

SECTION 6.7

Tracking views, interested parties and analytics

Open any RFP from **My RFPs** to reach its manage page: score, status (Open, Closing soon within 7 days, Closed, Awarded or Cancelled), due date with a countdown, and buttons for **View public**, **Report (PDF)** and **Copy link**. Five tabs sit below: **Analytics**, **Interested parties**, **Invited**, **Amendments** and **Award**.

TABLE **What the Analytics tab measures**

Metric	Meaning
Views and Unique visitors	Page views (bots excluded) and daily unique visitors summed since publishing
Report downloads and Doc downloads	Downloads of the RFP Detector report and of your attachments (per file in **Documents**)
Saves and I'm interested	Organizations that added the RFP to a pipeline or pressed I'm interested
Submit clicks	Clicks on your How to respond link
Funnel	Views → saves → I'm interested → connections
Traffic sources and Top referring sites	Where views came from: direct, search engines, RFP Detector (search, hubs, alerts), social, email or other sites
Improve your score	Missing Clarity & completeness details, with the points each would add. Only you see it

The **Interested parties** tab lists organizations (never individual users) with their categories, signal (Saved, Interested or Both), first signal date and any note. New rows appear within seconds. Use **Connect** to start a conversation, **Respond to request** if they wrote first, or **Message** once connected; **Export CSV** downloads the list. You get new interested parties in-app right away and in one daily email summary at 7:00 AM ET, plus summaries two days before and when your RFP closes.

> ☆ PRO TIP **Pro tip: no traffic yet? Share the link**
>
> If Analytics shows no views, press **Copy link** and send it to vendors you already know, your supplier lists and trade associations. Shared links show up under Traffic sources, so you can see which channel works.

SECTION 6.8

Finding vendors, shortlists and invitations

Find vendors searches the RFP Detector **vendor directory**: free listings published by vendors themselves. Facts are self-reported, and RFP Detector does not verify certifications, so check anything you rely on (licenses, insurance, certifications) during evaluation.

Search, shortlist and invite

1. ### Search and filter

   Search by service, company name or keyword (“janitorial”, “HVAC”, “IT support”), then filter by category, service area, sectors served, certification (self-reported) and team size. Sort by Best match, Recently updated or Name A–Z. Click a vendor for a quick view.

2. ### Shortlist

   Press **Shortlist** and add the vendor to an existing list or create one (for example “Janitorial 2027”). Lists are private to your organization; add a private note per vendor on the **Shortlists** tab.

3. ### Invite to an RFP

   On the manage page's **Invited** tab, press **Invite vendors**. Find vendors opens in invite mode, and each vendor shows **Invite**. Each invitation is a connection request with a link to the RFP; the message is optional.

   > **Tip:** From a shortlist, **Invite all to an RFP** or **Connect with all** sends one request per vendor and skips anyone you are already connected or pending with.

4. ### Talk in the inbox

   Vendors accept to open two-way messaging. Conversations live in **Inbox** in the left rail.

TEMPLATE

Vendor invitation message

Copy-ready online

A message for the Invite or Connect box. Optional for invitations; if you write one, use 20 to 1,000 characters.

WHEN TO USE When inviting shortlisted vendors. Keep it neutral and identical for every vendor you invite.

Hello,

[ORGANIZATION NAME] has published [RFP TITLE] on RFP Detector. Based on your listing, your [SERVICE OR CAPABILITY] may be a good fit.

Responses are due [DUE DATE AND TIME, TIME ZONE]. Questions are due [QUESTIONS DATE] and answers will be posted publicly as an amendment.

Please follow the How to respond section on the RFP page. This invitation does not guarantee selection; all responses are evaluated under the published criteria.

Thank you,
[YOUR NAME], [YOUR TITLE]

FIELDS TO FILL IN · 2

[SERVICE OR CAPABILITY]	What on their listing prompted the invitation.
[QUESTIONS DATE]	Point every vendor to the same public Q&A process so no one gets an advantage.

⚠ WARNING **Fairness and limits**

Give every vendor the same information. If you answer a question for one, post the answer as an amendment for all. Connection requests and invitations are limited to 20 new requests per organization per day.

SECTION 6.9

Amendments, extensions, closing and awarding

TABLE **What each action does (from the manage page or the row menu in My RFPs)**

Action	Available when	What happens
Edit (amendment)	Open, closed	You edit the form, then **Save amendment** lists the **Changes detected** and asks for a **What changed** note (5–500 characters). The note shows on the public timeline, the score and report are rebuilt, and every interested party is notified
Extend deadline	Open, closed	Pick a new date and time and add a note. Posted as an amendment; extending a closed RFP re-opens it
Close now	Open	Stops accepting interest and shows Closed. The score freezes at its published value. You can still record the award
Record award	Open, closed	Choose the awardee from the vendor directory or type the name; add amount, award date and an optional public note. The page shows Awarded and interested parties are notified
Cancel RFP	Open, closed	Pick a private reason (No longer needed, Budget or funding changed, Requirements changed, Will be re-issued, Other) and an optional public note. Can't be undone
Duplicate as draft	Any time	Copies the RFP into a new private draft, useful for re-issues and annual buys
Delete draft	Drafts only	Removes a draft that was never public

WORKED EXAMPLE

Worked example: answering questions by amendment (hypothetical)

✓ STRONG

> A Westchester nonprofit receives three vendor questions about square footage. Instead of replying privately, it attaches a site plan as Attachment C, adds a Q&A section to the description and saves an amendment noted “Added the site plan (Attachment C) and answers to vendor questions 1–3.” All 14 interested organizations are notified, and the public timeline shows exactly what changed and when.

Frequently asked questions

Is it free to post an RFP on RFP Detector?

Yes. Posting, analytics, interested parties and vendor search are free, and there are no fees for bidders. Turn on the Buyer workspace under Settings, Organization, Workspaces, set up your buyer profile and press **Post an RFP**.

Who can post an RFP?

Any organization with a verified account: companies, nonprofits, schools and public agencies. An owner or admin turns on the Buyer workspace. RFP Detector does not verify buyer postings, and the public page says so.

Can I post an RFP that isn't publicly listed?

Yes. Choose **Unlisted** under Visibility. Only people with the link can open it, and it is left out of search, hubs and sitemaps. It still gets a page, a score and a report. You can switch between Public and Unlisted later.

How do I change the deadline after publishing?

Use **Extend deadline** on the manage page. Choose the new date and time and describe the change. It is posted as an amendment and every interested party is notified. Extending a closed RFP re-opens it.

How do I see which vendors are interested in my RFP?

Open the RFP's **Interested parties** tab, or the **Interested parties** tab of the workspace for all RFPs. You see organizations that saved the RFP or pressed I'm interested, with any note. Connect, message or export the list as CSV.

How do I award an RFP and tell the other bidders?

Press **Record award** and choose the awardee, with an optional amount, date and public note. The page shows Awarded and every interested party is notified. Formal notices and debriefs your rules require still come from you (see award and debriefs).

→ KEEP GOING

RFP Detector for buyers
What you get when you post
rfpdetector.com/for-buyers

Account Security, Teams and Settings
Next chapter: workspaces, roles and security
rfpdetector.com/guides/how-to-use-rfp-detector/account-security-and-team-settings

Types of Solicitations
RFP, RFQ, IFB and RFI explained
rfpdetector.com/guides/how-to-find-government-contracts/types-of-solicitations-rfp-rfq-ifb-rfi

Researching Contractors
Check a vendor's public contract history
rfpdetector.com/guides/how-to-use-rfp-detector/researching-contractors-and-competitors

How the RFP Detector Score works
The factors behind your RFP's score
rfpdetector.com/methodology/score

Vendor directory
Browse vendors before you post
rfpdetector.com/vendors

END OF CHAPTER 6

Next: 07 RFP Detector Account Security, Teams and Settings

07

CHAPTER 7

RFP Detector Account Security, Teams and Settings

Everything in Settings, explained: how sign-in verification works, how to change your password, email and mobile, how to sign out everywhere, how to run your organization and team, and how to tune notifications.

14 min read · 10 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- Every new browser is confirmed with a 6-digit text code. Tick **Remember this device for 30 days** only on computers you alone use.
- Email, mobile, sessions and remembered browsers unlock for 15 minutes after you confirm your password on the **Security** page.
- When a device is lost or someone leaves, use **Sign out others and forget browsers**, then change your password.
- Owners and admins manage the team and workspaces; members do the day-to-day work. Every organization needs at least one owner.
- Notification preferences let you choose in-app and email per event, set deadline reminder timing and pause all non-security emails.

IN THIS CHAPTER

7.1 Where your account settings live 91
7.2 How sign-in verification works: text codes and remembered browsers 92
7.3 How to change your password 93
7.4 Changing your sign-in email or mobile number 94
7.5 Sessions, remembered browsers and signing out everywhere 94
7.6 How to reset a forgotten password 95
7.7 Organizations and workspaces 96
7.8 What can owners, admins and members do? 97
7.9 Notification preferences 98
7.10 Profile settings, privacy and getting help 99

Your RFP Detector account holds your pipeline, bid notes, conversations with buyers and, if you post RFPs, the vendors interested in them. Good RFP Detector account security keeps that safe, and good team settings make sure the right people can see and act on it. This chapter walks through every part of **Settings**: sign-in verification, passwords, email and mobile changes, sessions, organizations, team roles, notifications, privacy and where to get help.

> **TIP** **Before you start**
>
> Open **Settings** from the left rail. Your account menu (your name, top right) also has **Profile**, **Security** and **Create or manage organizations**, and the bell icon leads to **Notifications** and its **Preferences**. New here? Set up your account first with Getting Started.

SECTION 7.1

Where your account settings live

TABLE **The five Settings sections, plus notifications**

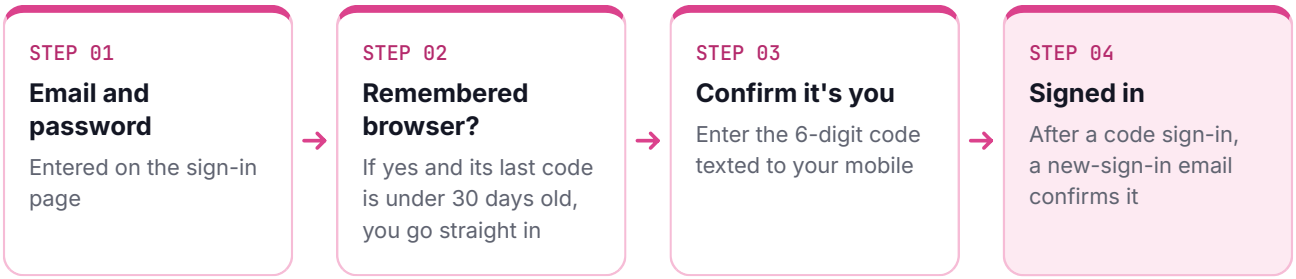
Section	What you change there	Who can change it
Profile	Full name, time zone (used for dates in your dashboard), photo	You
Security	Password, sign-in email, mobile number, sessions, remembered browsers; recent security events	You
Organization	Organization name, short name, website, logo, workspaces (Vendor, Buyer); leave the organization	Owners and admins (anyone can leave)
Team	Members, roles, invitations	Everyone sees members; owners and admins manage
Organizations	Every organization you belong to; switch; create a new one	You
Notifications › Preferences	In-app and email per event, deadline reminder timing, pause all emails	You

SECTION 7.2

How sign-in verification works: text codes and remembered browsers

RFP Detector uses two-step verification: your password, plus a one-time code texted to the mobile number you verified at sign-up whenever you sign in on a new browser. A remembered browser can skip the code for up to 30 days. Here is what happens each time you sign in.

What happens when you sign in



- **Codes** are 6 digits, expire after 10 minutes, allow 5 tries and work once. **Resend code** becomes available after a short wait (about a minute).
- **Remember this device for 30 days** is ticked by default on the code screen. Untick it on shared or public computers.
- **Didn't get it? Email me a code instead** appears after 30 seconds, or at once if texts are failing. Signing in with an emailed code does not remember the browser, so you will get a text next time.
- **Too many wrong passwords** temporarily lock sign-in: “Try again in 15 minutes or reset your password.”

> **NOTE** **Why text codes, and how to keep them safe**
>
> A second factor means a stolen password alone can't open your account; government security agencies urge turning multifactor authentication on wherever it is offered. Text codes are not the strongest kind, because phone numbers can be hijacked through SIM swaps or number porting. Ask your mobile carrier for a port-out PIN or lock, and never read a code to anyone who calls or texts asking for it.

SECTION 7.3

How to change your password

Change your password

1 Open Security

Go to **Settings › Security**, or choose **Security** in your account menu.

2 Fill in the Password card

Enter your **Current password**, a **New password** and **Confirm new password**.

3 Save

Press **Change password**. Your other sessions are signed out; this browser stays signed in.

> **Tip:** New passwords need at least 10 characters. Very common passwords are rejected, and passwords that appear in known data breaches may be too; the message tells you why.

Password habits that work (in line with current federal guidance)

Do

- ✓ Make it long: a passphrase of four or more unrelated words is strong and memorable
- ✓ Use a different password for every account
- ✓ Let a password manager generate and fill it
- ✓ Change it right away if you suspect it was exposed

Don't

- ✗ Reuse the password from your email or a supplier portal
- ✗ Share one login across the team (invite each person instead)
- ✗ Rely on swaps like P@ssw0rd; length beats symbols
- ✗ Send a password by email, text or chat

SECTION 7.4

Changing your sign-in email or mobile number

Changes that could hand your account to someone else are locked until you confirm your password. A **Confirm your password to make changes** banner sits at the top of the Security page; once you confirm, email, mobile, sessions and remembered browsers stay unlocked for 15 minutes.

Change your email or mobile

1. **Confirm your password**
   Enter it in the banner and press **Confirm**.
2. **New email**
   In the **Email** card, enter the **New email** and press **Send code**. Enter the 6-digit code sent to the new address and press **Confirm new email**. Your old address gets a notice of the change.
3. **New mobile number**
   In the **Mobile number** card, enter a **New mobile number** (US or Canadian), accept the text-message consent and press **Text me a code**. Enter the code and press **Confirm new number**. A notice goes to your account email.
4. **Decide about other sessions**
   Both confirm screens have **Sign out other sessions** ticked by default. Leave it ticked unless you are sure every other signed-in device is yours.

> **Tip:** Each can be changed up to three times a day. Your mobile number receives security codes only, never notifications or marketing.

SECTION 7.5

Sessions, remembered browsers and signing out everywhere

The **Sessions** card lists where your account is signed in: browser and device, IP address and country, last active and when it signed in, with **This browser** marked. A session lasts up to 30 days and ends sooner after a week without activity. The **Remembered browsers** card lists browsers that skip the text code.

TABLE **Which button to press**

Situation	Use	Effect
You see a session you don't r ecognize	**Sign out** on that row	Ends that one session
You left yourself signed in on another computer	**Sign out all other sessions**	Ends every session except this browser
Lost phone or laptop, or suspected compromise	**Sign out others and forget browsers**	Ends other sessions and forgets every remembered browser, so a text code is needed everywhere
You stopped using a computer	**Remove** under Remembered browsers (or **Remove all browsers**)	That browser needs a text code next time
You're done on this computer	**Sign out** in your account menu	Ends this session

Recent security events shows your latest sign-ins, password and email changes, mobile changes, remembered or removed browsers, emailed-code fallbacks and temporary lockouts, with IP and country. Check it whenever a new-sign-in email surprises you.

✕ COMMON MISTAKE **Common mistake: signing out but not changing the password**

Signing out other sessions stops current access, but if someone knows your password they can try again. After a suspected compromise: sign out others and forget browsers, change your password, then check your mobile number and email on the same page.

SECTION 7.6

How to reset a forgotten password

Reset your password

1. **Start from sign-in**
   On Sign in, press **Forgot password?**, enter your account email and press **Send reset link**.
2. **Open the email link**
   Reset links work once and expire after 30 minutes.

3 **Confirm it's you**

Enter the code texted to your verified mobile. If texts are failing, **Texts are failing. Email me a code instead** appears.

4 **Choose a new password**

Enter and confirm it, then press **Save new password**. Saving signs out every other session and forgets remembered browsers.

SECTION 7.7

Organizations and workspaces

An **organization** is your company's shared space: one pipeline, one inbox and one set of workspaces. One is created when you finish signing up. You can belong to several (for example your firm and a joint venture), and data, pipeline and inbox are separate for each. Switch from your account menu or **Settings › Organizations**, where **Create an organization** makes a new one with you as owner, free.

TABLE **Workspaces (Settings › Organization › Workspaces)**

Workspace	What it adds	If you turn it off
Client dashboard	Search, saved RFPs, pipeline, alerts, calendar, reports, inbox. Always on	Can't be turned off
Vendor workspace	Your free listing in the vendor directory, and who views and contacts you	Your listing is unpublished; you can republish later
Buyer workspace	Post RFPs free, see interested parties, search vendors	The workspace is hidden; RFPs you published stay public until they close

Owners and admins edit the organization's **Name**, **Short name** (lowercase letters, numbers and dashes), **Website** and logo, which is shared by your vendor listing and buyer profile. For the listing and RFPs themselves, see Building Your Vendor Profile and Posting RFPs as a Buyer.

SECTION 7.8

What can owners, admins and members do?

TABLE What each role can do

Role	Can do
Member	All day-to-day work: search, save and track RFPs, alerts, the inbox, and the vendor listing or buyer RFPs once those workspaces are on
Admin	Everything a member can, plus invite and remove members, change member and admin roles, edit organization details and logo, and turn workspaces on or off
Owner	Everything an admin can, plus make other owners and change or remove owners. Every organization needs at least one owner

Invite a teammate

1. **Open Team**
   Go to **Settings › Team**. Owners and admins see **Invite a teammate**.
2. **Send the invitation**
   Enter their **Email**, choose **Member** or **Admin**, and press **Send invitation**.
3. **They accept**
   The invitation email leads to **Join [organization]**. They sign in, or create an account with the invited email, and press **Accept and join**. Invitations expire after 7 days.

   > **Tip:** Under **Pending invitations**, use **Resend** for a fresh 7-day link or **Revoke** if it went to the wrong address.
4. **Adjust roles later**
   In the members table, change the role from the dropdown or press **Remove**. Only owners can make someone an owner.

When someone leaves your company

CHECKLIST · 6 ITEMS

- [ ] Reassign their pipeline items to a teammate (change the Owner on each item)
- [ ] If they were the only owner, make someone else an owner first
- [ ] Press **Remove** next to their name in **Settings › Team**
- [ ] Revoke any pending invitations they sent to the wrong addresses
- [ ] If they knew a shared mailbox or buyer contact address, change that password too
- [ ] Check **Last active** on the Team page each quarter and remove anyone who no longer needs access

> ⚠ WARNING **Leaving an organization**
>
> **Leave organization** removes your access to its pipeline, inbox and workspaces. If you are the only owner, you must make another member an owner first. You can't remove yourself on the Team page; use **Leave [organization]** on **Settings › Organization**.

SECTION 7.9

Notification preferences

Open the bell icon, choose **Notifications**, then **Preferences**. Each event has an **In-app** and an **Email** switch, and changes save as you go. You only see groups that apply to you (Buyer and Vendor events appear once those workspaces are on).

TABLE **Notification groups and the details worth knowing**

Group	Events	Good to know
Alerts and tracked RFPs	Alert matches, Tracked RFP amended, awarded, cancelled	Award and cancellation emails are off by default. Each alert also has its own cadence: instant, daily at 7:00 AM ET or weekly on Mondays
Deadlines	Deadline reminders	Sent to the owner of pipeline items in Saved, Qualifying or Preparing, at 7:00 AM ET

Group	Events	Good to know
Connections and messages	Connection requests, accepted, declined; New messages	Message emails go only if a message is still unread after 10 minutes, at most one per conversation per hour
Buyer workspace	New interested parties, RFP published, Your RFP closes in 2 days, Your RFP closed	Interested parties: in-app right away, one email summary a day
Vendor workspace	Vendor listing published, Vendor listing hidden	A hidden-listing notice is always sent
Security	Codes, password and email changes, new sign-ins	Always sent; can't be turned off

- **Deadline reminder timing:** tick any of 7 days before, 3 days before, 2 days before, 1 day before and On the day. The default is 3 days and 1 day; with nothing ticked, no reminders are sent.
- **Pause all emails** stops every non-security email; in-app notifications continue. Press **Resume emails** to undo. Every email also has a one-click unsubscribe for just that kind of email.
- **No notification texts.** Your mobile receives verification codes only.

For alerts themselves (what they match and how often), see Tracking Bids: Pipeline, Alerts and Notifications.

SECTION 7.10

Profile settings, privacy and getting help

On **Settings › Profile**, set your **Full name** and **Time zone** and press **Save profile**; dates in your dashboard use that zone. Add an optional photo with **Upload a photo**; it shows on your account chip and in team lists. Your email is shown with a **Change email** link to Security, and a **Your account** card summarizes your organization, role, workspaces and verified mobile.

For anything else, use the contact form; a person reads every message and replies by email. Pick the topic that fits: General question, Data correction, Removal request, Vendor listing, Posting an RFP (buyers), **Delete my account** or Something else. Account deletion is handled through that topic.

TEMPLATE

One-page team account security policy

Copy-ready online

A short internal policy for everyone at your company who uses RFP Detector.

WHEN TO USE Adopt it when you invite your second teammate, and review it once a year or after anyone leaves.

RFP DETECTOR ACCOUNT POLICY: [COMPANY NAME]
Owner of this policy: [NAME, TITLE] Last reviewed: [DATE]

1. One person, one login. Everyone gets their own invitation. No shared accounts or passwords.
2. Roles. Owners: [NAMES]. Admins: [NAMES]. Everyone else is a Member. We keep at least two owners.
3. Passwords. At least [NUMBER] characters, unique to RFP Detector, stored in [PASSWORD MANAGER].
4. Mobile numbers. Each person verifies their own work or personal mobile and asks their carrier for a port-out PIN.
5. Remembered browsers. Only on company or personal devices that no one else uses. Never on shared or public computers.
6. Lost device. Report to [CONTACT] within [HOURS] hours. Then: Sign out others and forget browsers, and change the password.
7. Leavers. On the last day, [ROLE] reassigns their pipeline items and removes them in Settings, Team.
8. Quarterly review. [ROLE] checks the Team page (Last active) and each person checks Recent security events.
9. Codes. Never share a verification code with anyone, including callers claiming to be support.

Acknowledged by: [NAME] Date: [DATE]

FIELDS TO FILL IN · 3

[NUMBER]	RFP Detector requires at least 10; many security agencies now suggest 15 or more, or a passphrase.
[PASSWORD MANAGER]	Whatever your company uses. If none, choose one before rolling this out.
[ROLE]	Usually the office manager or the owner who handles IT.

Frequently asked questions

Why does RFP Detector text me a code when I sign in?

It is two-step verification. The first time you sign in on a browser, or when its last code is more than 30 days old, you confirm with a 6-digit code texted to your verified mobile. Tick **Remember this device for 30 days** on your own computer to be asked less often.

I didn't get the text code. What can I do?

Wait a minute and press **Resend code**. After 30 seconds you can also choose **Didn't get it? Email me a code instead**. An emailed code signs you in but doesn't remember the browser. Codes expire after 10 minutes.

How do I sign out of RFP Detector on all devices?

Go to **Settings › Security**, confirm your password, and in **Sessions** press **Sign out all other sessions**, or **Sign out others and forget browsers** if a device was lost. Then sign out of the current browser from your account menu if needed.

Can I use a phone number outside the US?

Mobile numbers for verification must be US or Canadian mobile numbers. The number is used only for security codes.

How do I remove a former employee from our account?

An owner or admin opens **Settings › Team** and presses **Remove** next to their name. Reassign their pipeline items (the Owner field) first. If they were the only owner, make someone else an owner before they leave.

How do I transfer ownership of my organization?

An owner opens **Settings › Team** and changes another member's role to **Owner**. Once there is a second owner, the first can change their own role or leave the organization.

How do I delete my RFP Detector account?

Send a request through the contact form with the topic **Delete my account**. A person reads every message and replies by email.

→ KEEP GOING

Getting Started
Account, verification and workspaces from the start
rfpdetector.com/guides/how-to-use-rfp-detector/getting-started-with-rfp-detector

Tracking Bids
Pipeline, alerts and notifications
rfpdetector.com/guides/how-to-use-rfp-detector/tracking-bids-pipeline-and-alerts

Posting RFPs as a Buyer
Use the Buyer workspace
rfpdetector.com/guides/how-to-use-rfp-detector/posting-rfps-as-a-buyer

Keeping Registrations Active
Avoid lapses and registration scams
rfpdetector.com/guides/how-to-register-for-government-contracts/keeping-registrations-active-and-avoiding-mistakes

Contact RFP Detector
Questions, corrections and account requests
rfpdetector.com/contact

Sign in
Open your dashboard
rfpdetector.com/sign-in

END OF CHAPTER 7

RFP Detector

Put this handbook to work. Find your next RFP.

RFP Detector brings government, education, nonprofit and private-sector RFPs into one place, so you spend less time hunting and more time writing proposals you can win.

- Search and filter open RFPs from public and private buyers
- See the RFP Detector Score on every RFP, plus a Fit score for your organization
- Save RFPs, track bids on your pipeline board and get alerts for new matches
- Download an RFP report (PDF) and list your business in the free vendor directory

Find RFPs at rfpdetector.com →



THE RFP DETECTOR HANDBOOKS

1. How to Find Government Contracts and RFPs
2. How to Register and Get Certified for Government Contracts
3. How to Respond to an RFP and Write a Winning Proposal
4. RFP Response and Proposal Templates
5. How to Use RFP Detector: The Complete Tutorial
   You are reading this handbook

All handbooks: rfpdetector.com/guides

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