

Company Settings

Company Administrators can customize many settings that are pre-loaded as defaults in OneTeam.

Company Settings for Company OneTeam Administrator

- Add or edit company users.
- Assign or change permissions levels to users.
- Designate company divisions.
- Determine names for Opportunity *Stages*.
- Create and manage *Required Fields* per Stage.
- Create and manage Custom Fields.
- Manage contract roles.
- Manage and modify company templates for *Qualification Matrices*, including criteria, responses, and weighting for each.
- Create and manage *Qualification Checklists*.
- Add *document templates* for data calls, meetings, and proposals.
- Create and manage document *Tags*.
- Create and manage *Gate Review Templates*.
- Create and edit *Revenue Targets* and Win Rate for the entire company and/or each division.
- Set custom date ranges for *RFP Window* fields.
- Develop custom Capability Matrix terms and options.
- Create or edit *Communication* templates.
- Customize color team Reviewer Ratings.
- Manage integrated services such as Microsoft 365, GovWin, Salesforce, and the OneTeam API.

Subscription

ONEteam Opportunities Contacts Search Analytics Support			
Company Settings			
Subscription Organization Capture Dashboard Bid Services			
Plan	Renewal Date	Price (per year)	Status
Premium	12/30/2099	\$0	Active
Standard Users	Limited Users	Active Opportunities	Active Proposals
11 / ∞	0 / ∞	62 / ∞	17 / ∞

View Subscription information, including renewal date, plan type, current price per year, number of Standard and Limited Users, active opportunities and active proposals.

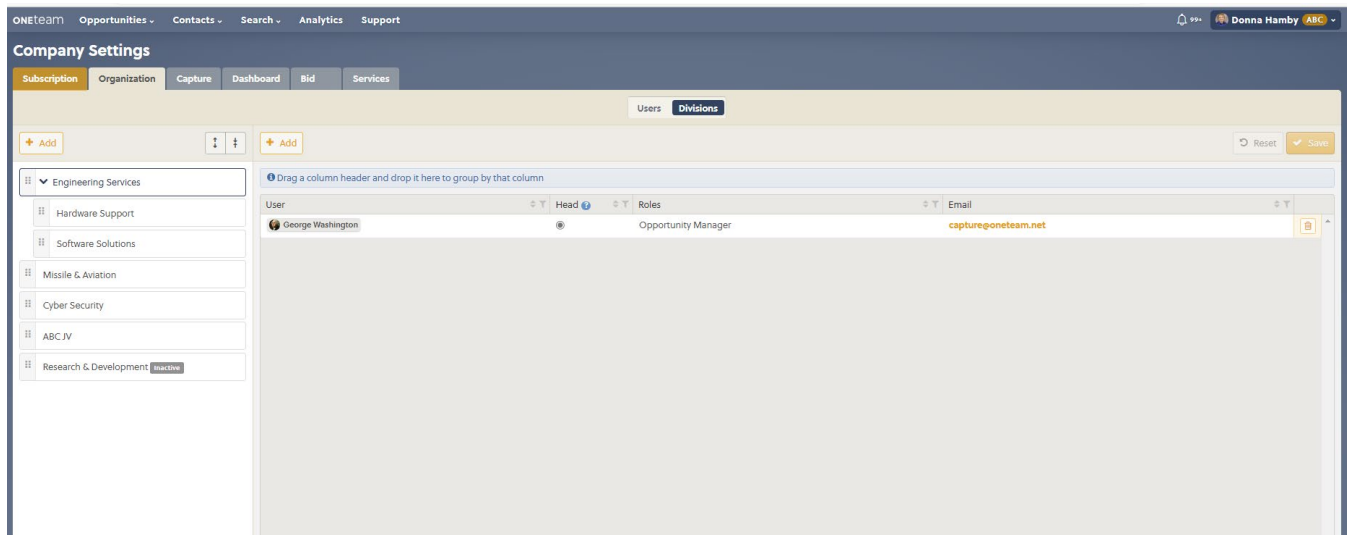
Organization

Company Users

ONETeam Opportunities Contacts Search Analytics Support				
Company Settings				
Subscription Organization Capture Dashboard Bid Services				
Users Divisions				
+ Add Export				
<div> <div>Status</div> <div>Name Email Permissions Status</div> </div>				
▼ Status: Standard 11				
Abigail Adams	abigail.adams@oneteam.net	Opportunity Manager, Opportunity Viewer, Opportunity Manager (Hardware Support)	Standard	
Alexander Hamilton	proposals@oneteam.net	Company Administrator, Company Profile Manager, Opportunity Manager	Standard	
Donna Hamby	donna.hamby@oneteam.net	Company Administrator, Company Profile Manager, Opportunity Manager, Report Manager	Standard	
Eddie Crosbie	eddie.crosbie@tgi-us.com	Opportunity Manager	Standard	
George Washington	capture@oneteam.net	Company Administrator, Company Profile Manager, Report Manager, Opportunity Manager, Opportunity Manager (Engineering Services)	Standard	
Glenn Meyer	glenn.meyer@tgi-us.com	Report Manager, Company Administrator, Company Profile Manager, Opportunity Manager	Standard	
Jason Merkel	jason.merkel@tgi-us.com	Report Manager, Opportunity Manager, Company Administrator, Company Profile Manager	Standard	
John Adams	prime@oneteam.net	Company Administrator, Company Profile Manager, Opportunity Manager	Standard	
Max Alonso	max.alonso@oneteam.net	Opportunity Manager, Company Administrator	Standard	
Melissa Gabor-Midyett	melissa.gabor@oneteam.net	Company Administrator, Opportunity Manager, Opportunity Viewer, Report Manager	Standard	
Molly Pitcher	Molly.Pitcher@oneteam.net	Opportunity Manager (Hardware Support)	Standard	
▼ Status: Inactive 0				

- Goal:** Manage internal company users, roles, and permissions.
- OneTeam:** Designate Standard Users and assign role-based permissions. Easily inactivate users who no longer require OneTeam access.
- Location:** Company Menu, Organizations, Users Sub-Tab
- Actions:** Company Administrators designate users and assign permissions based on their BD role.
Edit users and change users from Active to Inactive to instantly remove their OneTeam access.
Designate Limited Users within internal company, these will have same permission level as subcontractor Writers and Reviewers.
- Best Practice:** When users leave the company or no longer need access to OneTeam data, immediately edit their status from Active to Inactive to maintain data security. All actions and connections between inactive users and documents and notes, are maintained.

Company Divisions



- Goal:** Designate Company Divisions, enter and produce more detailed data at a lower level than overall company data.
- OneTeam:** Use divisions to control access to data, set revenue targets and win rates, view revenue projections, and other data at the division level.
- Location:** Company Menu, Organizations, Company Divisions Sub-Tab
- Actions:** Set company Divisions and also divide divisions into lower level sections.
Set Revenue Targets for entire company and each Division or lower level section.
Set Win Rate Targets for entire company and each Division or lower level section.
- Best Practice:** If your company uses consultants to serve as Capture or Proposal Managers, set up a separate division for the consultant, and limit their access to Opportunities in that Division only. This allows the consultant to have the same level of permission as any Capture or Proposal Manager, without access to any other opportunities in your company's pipeline.

Capture

Stages

Description	Default	Type	Show on Dashboards
Assign Stage	<input checked="" type="radio"/>		<input checked="" type="checkbox"/>
Lead	<input type="radio"/>		<input checked="" type="checkbox"/>
Capture	<input type="radio"/>		<input checked="" type="checkbox"/>

Goal: Define Stages that align with your company's BD process.

OneTeam: Designate custom Stage names, set default Stage and other info regarding Stages.

Location: Menu, Capture Tab, Stages Sub-Tab

Actions: Designate Stages that support and align with company BD process.
Set default stage for all new opportunities that are automatically imported from GovWin or manually added.

Determine Type of Stage, to support Analytics Reports.

Determine which Stages will automatically populate Opportunity Views and Dashboard by defining as Active Stage.

Re-order Stage listing to preferred list.

Best Practice: Use Stage names that your company and BD personnel already use, this will increase adoption and proficiency with OneTeam.

Required Fields

Field	Stages
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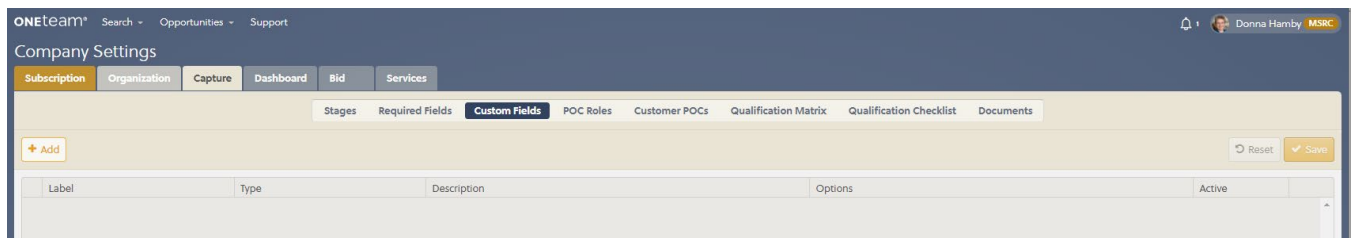
Goal: Designate specific data field(s) that must be completed to proceed to specific Stage(s). **OneTeam:** Customize data requirements and align with your BD processes.

Location: Menu, Capture Tab, Required Fields Sub-Tab

Actions: Company Administrators can designate required fields for creating opportunity to advance opportunity through BD Stages. Required fields can be different for each Stage.

Best Practice: Determine what information is required to be completed to proceed to specific Stages.

Custom Fields



- Goal:** Create Custom Fields to collect and manage data not available with OneTeam’s default data fields on each Opportunity Details Tab.
- OneTeam:** Add custom data fields to align OneTeam with your current BD processes.
- Location:** Menu, Capture Tab, Custom Fields Sub-Tab
- Actions:** Create custom fields, including text, drop-down, currency, date, integer, decimal, and checkbox.
- Best Practice:** Determine information that will help your team work best. Custom Fields can also be sorted, filtered, or grouped in the Opportunities Pipeline view.

Contract Roles

ONEteam Opportunities - Contacts - Search - Analytics - Support			
Company Settings			
Subscription Organization Capture Dashboard Bid Services			
Stages Required Fields Custom Fields Revenue Contact Roles Qualification Matrix Qualification Checklist Documents Tags Review			
+ Add			
Reset Save			
Description	Allow for Subs	Require for Subs	
BD Manager	<input type="checkbox"/>	<input type="checkbox"/>	
Capture Manager	<input type="checkbox"/>	<input type="checkbox"/>	
Contracts Manager	<input type="checkbox"/>	<input type="checkbox"/>	
Contracts POC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Cost Volume Manager	<input type="checkbox"/>	<input type="checkbox"/>	
Desktop Publisher	<input type="checkbox"/>	<input type="checkbox"/>	
Graphic Specialist	<input type="checkbox"/>	<input type="checkbox"/>	
Primary POC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Program Manager	<input type="checkbox"/>	<input type="checkbox"/>	
Proposal Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	
Proposal Editor	<input type="checkbox"/>	<input type="checkbox"/>	
Proposal Manager	<input type="checkbox"/>	<input type="checkbox"/>	
Rates and Pricing POC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

- Goal:** Create POC list of BD team members specific to each opportunity.
- OneTeam:** Edit, Add, and Manage all Contact Roles to provide easy access to list of POCs.
- Location:** Menu, Capture Tab, Contract Roles Sub-Tab
- Actions:** Create and edit Roles with description, whether role is allowed for subcontractor, and required for subcontractor.
- Best Practice:** Create Roles that align with your BD process to encourage OneTeam adoption.

Qualification Matrix

Quantitatively evaluate Opportunities against criteria to determine which bids are best for your company at this time. Set up the customizations so that Capture Managers can use the interactive Qualification Matrix to assess readiness and alignment with the customer's goals for each individual opportunity in the pipeline.

Qualification Matrices are customized by Company Admins in the **Company Settings** Menu, **Capture** Tab, **Qualification Matrix** Sub-Tab.

The screenshot below shows the set-up area with various template names on the left side, and the content of a selected template filling the rest of the screen. In the example below, The ABC Prime Bid, which is the default matrix for the ABC Company, is selected on the left, and the contents of that template are displayed.

Criteria	0	1	2	3	4	Weight
Does the opportunity fit with Strategic Plan?	Have not assessed	No Strategic Plan Swim Lanes Match	1-2 Strategic Plan Swim Lanes Match	3-4 Strategic Plan Swim Lanes Match	5+ Strategic Plan Swim Lanes Match	4
Strategic Fit?	Counter to core business and corporate direction	Somewhat counter to our core business model and corporate direction	Neutral to core business and corporate direction	Very close to our core business model and corporate direction	Fully aligned to core business and corporate direction	7
Are there negative impacts on current commitments, Financial Goals, and/or Operational Ability?	Significant Negative Impacts Critical Condition	Moderate Negative Impacts Slow Recovery	Recoverable Negative Impacts	Mitigatable Negative Impacts	No Negative Impacts	4
Program Manager ID'd?	No PM Identified	PM identified, barely qualified but unknown to the customer	PM identified, well qualified but unknown by the customer	PM identified, extremely well qualified, unknown or little known by the customer	PM identified, extremely well qualified and known to be very well liked and trusted by the customer	10
What is the impact on Expansion Goals?	None	Low	Moderate	High	Very High	4
Do We Understand the Problem?	No Staff Available that can understand the problem	Few on staff that can understand the problem and adequately write to it	Adequate Staff Available that can understand the problem	Many on staff that can adequately understand the problem and write to it	Excellent Staffing Available that can understand the problem and write to it	8
What is the contribution to Future Growth Potential?	None	Low	Moderate	High	Very High	4
Opportunity Real?	No funding yet identified, acquisition strategy not yet identified	Funding is questionable	Funding is pending	Funding is most likely	Funded, acquisition strategy approved, has a champion	10
What is the Time Allowed to perform capture?	Less than 3 months	3-6 Months	6-9 Months	9 Months-1 Year	1 Year+	4
Customer Relationship?	We have no incumbency with the customer, we know no one	We have very limited incumbency	We have subcontractor incumbency, we know limited	We have strong incumbency, but our relationships are not solid	We are the incumbent, the customer likes us, we understand	10
	0%	1%	26%	51%	76%	

The Template area on the left is divided into two sections:

- Company Templates – templates that have been created by a Company Admin or copied from a Sample Template and customized.
- Sample Templates

When setting up OneTeam initially, there will be one default template under Company Templates and four Sample Templates provided by OneTeam. These sample templates are:

- Prime Bid – an extensive set of qualification criteria for a major prime bid with 34 rows of criteria.
- Subcontractor Bid Qualification – criteria is geared towards a subcontractor position with criteria addressing prime and subcontractor criteria with about 15 qualification criteria.
- Task Order Bid – a shorter 8-criteria evaluation focused on Task Orders under an IDIQ contract vehicle.
- Prime Bid Shortened – a 12-criteria evaluation selected from the full Prime Bid template.

Company Admins may choose to copy the sample templates and use them as is or customize them to their own BD process.

Company Admins may modify Qualification Matrix templates including description, responses, and weighting of qualification criteria. Select the desired criteria or response to change and edit with the selected cell.

Best Practice: Multiple custom Qualification Matrices for different Government agencies or based on your role in the bid, such as Prime Matrix, Subcontractor Matrix, or Task Order Matrix.

Streamline your process so that the Qualification Matrix works for your BD process.

Your company will retain your current Qualification Matrix as your company's default Qualification Matrix. Your opportunities that have been scored with your matrix will not change.

But for opportunities that you have not completed a Qualification Scoring for, you will see your company's default matrix in the Qualification Tab. A company administrator can go into OneTeam Company Settings and make changes to the default matrix or use one of the new matrix templates that OneTeam has loaded into your workspace.

OneTeam has provided several sample Qualification Matrices, which you can duplicate and further customize to your company's specific BD Process.

These sample or template matrices included in this release are:

- Two expanded matrices for Prime Bids
- One matrix specifically focused on Subcontractor Bids
- One matrix focused on criteria for Task Order Bids

In the coming months, we expect to release more matrices including:

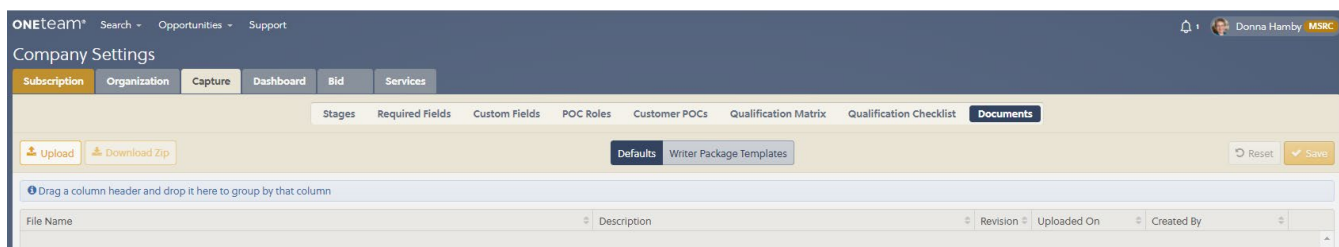
- Direct Award Matrix
- Recompete Bid Matrix

You may select a OneTeam sample matrix as a starting point and make customizations or use them as provided.

Qualification Checklist

- Goal:** Create checklists to provide a way for the BD Team to keep track of activities completed.
- OneTeam:** Create unlimited checklists that are available for every Opportunity in your pipeline.
- Location:** Company Settings Menu, Capture Tab, Contract Roles Sub-Tab
- Actions:**
- Develop custom checklists for Gate Reviews, including checklist Name, Sections, Subsections, and Questions or Actions.
 - Develop custom checklist for new BD personnel.
 - Develop checklist for proposal production.
 - Develop checklist for Before Red Team, During Red Team, and After Red Team actions.
- Best Practice:** Here are ideas of Checklists you can create:
- '20 Questions to ask the Contracting Officer', that the new Capture Manager can check-off and make notes about the answers. This is great for new BD Team members to show the process your company follows.
 - Gate Reviews in a Checklist format.
 - Red Team Review Checklist for Proposal Managers.
 - Production Checklist.

Capture – Documents - Defaults



Goal: Create library for all Documents that will be available to use in all Opportunities in the Pipeline.

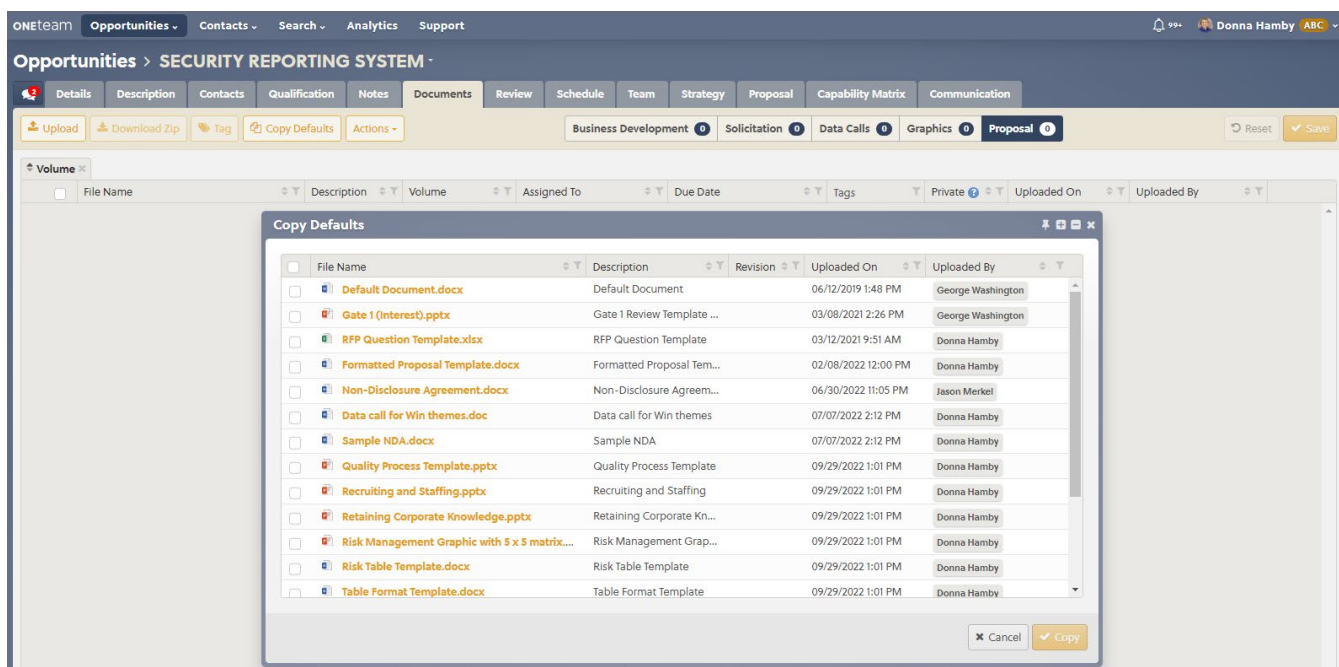
OneTeam: Central Document Repository for most company document that will be re-used in proposals. This is accessible in all Opportunities in the Data Calls, Proposal, Graphics, and Business Development libraries. Documents can be Word, PowerPoint, Excel, pdf, png, jpeg, and mp4 files.

Location: Menu, Capture Tab, Contract Roles Sub-Tab

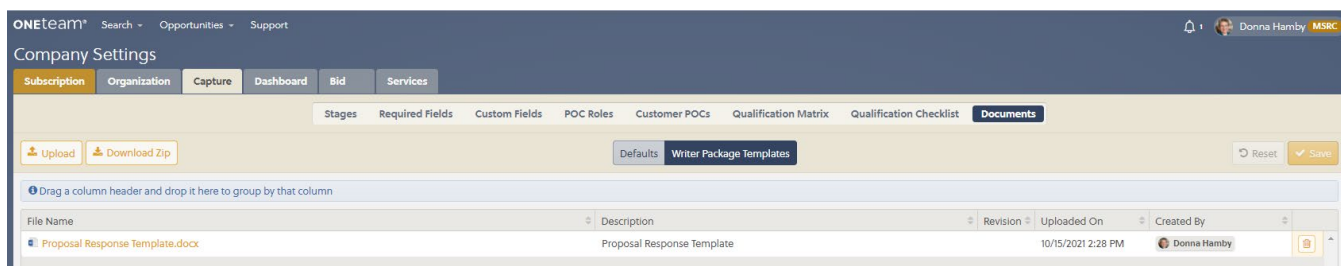
Actions: Upload custom default documents, such as NDAs, TAs, data calls, graphics masters, and more.

Best Practice: Create a library of commonly used graphics in PowePoint with one graphic per file. Name and tag the file appropriately and load into Default Documents. All Documents can be used by all Opportunity Managers in any Opportunity by adding that document from the Defaults library to the Opportunity library.

Below is an example of how the Default Documents are available to the Opportunity Document libraries, where they can be selected or multi-selected, and copied to a specific Opportunity. The original remains in the Default Document Repository unchanged.



Writer Package Templates



Goal: Create Document Repository for Word Templates for Proposal Writer Packages.

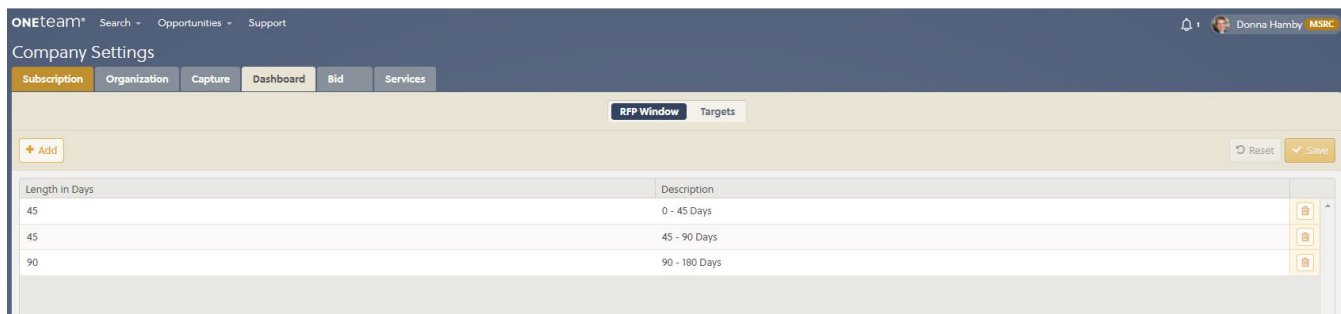
OneTeam: Use the Writer Package Templates library to store customized Word templates for all proposal documents.

Location: Menu, Capture Tab, Contract Roles Sub-Tab **Actions:** Add or modify Writer Package templates.

Best Practice: Use a clean Word document that does not have hundreds of styles. Create your customized Word template using your corporate style guide, and designated set of styles for proposals. Include a title page, your company logo, headers and footers, page numbers, disclaimer statement, Table of Contents, List of Figures, and other customized features in your template. Use this template to create proposal specific templates that match RFP font and margin requirements.

Dashboard

RFP Window



Goal: Customize the RFP Window to help the BD Team visualize upcoming opportunities in relation to the entire Pipeline.

OneTeam: OneTeam has a default set of days to calculate RFP Window: 0-45 days, 45-90 days, and 90-180 days. These are used in the Dashboard and Opportunity Pipeline to provide visuals of upcoming RFPs and in strategic planning.

Location: Menu, Dashboard Tab, RFP Window Sub-Tab

Actions: Set custom ranges for RFP Window.

Best Practice: Set the RFP Windows for the number of days that best supports your proposal process. For example, usually 0-90 days, 90-180 days, and 180-365 days work well for most BD teams.

Targets

Company Settings

Subscription Organization **Targets** Bid Services

RFP Window

Company & Divisions

ABC Company

- ABC JV
- Cyber Security
- Engineering Services
- Missile & Aviation

Target Win Rate

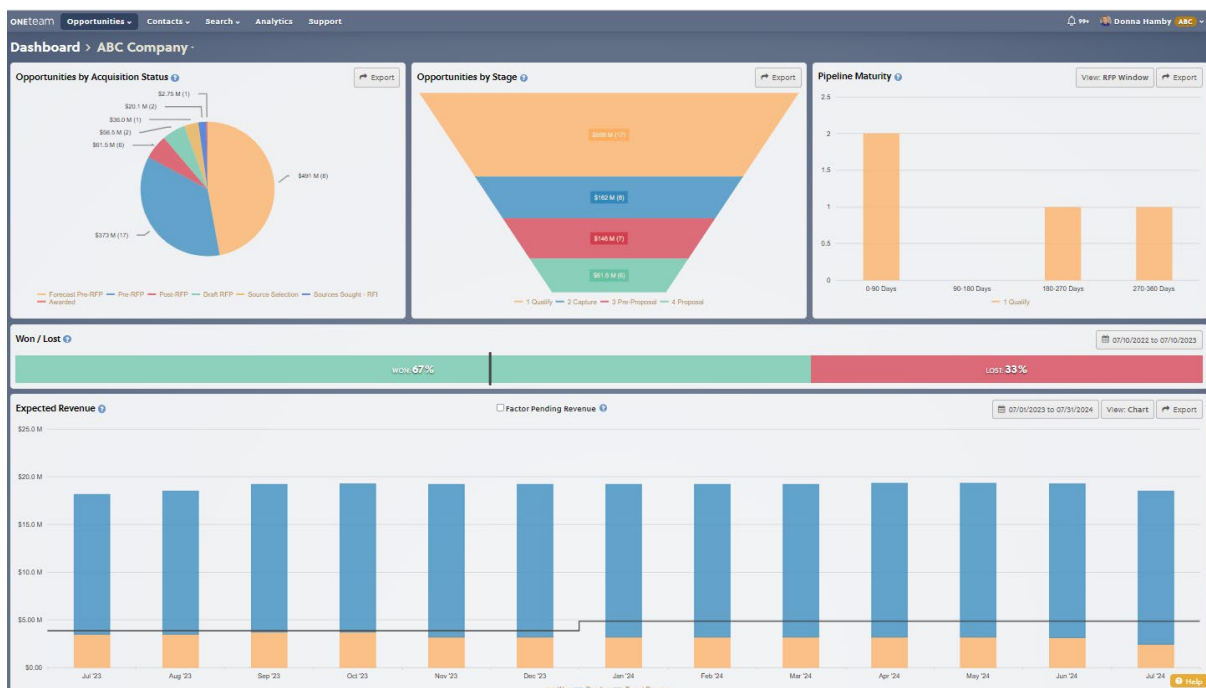
40 %

Expected Revenue Targets

Year	Revenue Target	Status
2018:	\$8,000,000	
2019:	\$14,000,000	
2020:	\$20,000,000	
2021:	\$26,000,000	Warning
2022:	\$36,000,000	
2023:	\$46,000,000	
2024:	\$58,000,000	
2025:	\$70,000,000	

Save

- Goal:** Set Target Win Rate and Target Revenue Goals to support strategic planning.
- OneTeam:** Set targets and then keep up-to-date with progress totals goals.
- Location:** Menu, Dashboard Tab, Targets Sub-Tab
- Actions:** Set revenue target for entire company for multiple years.
- Best Practice:** Projections are only as good as the data you use to create them. Be sure to update Company Revenue after contract wins to accurately reflect actual contract value. Always mark opportunities as Won or Lost to keep accurate statistics and revenue projections.
- Note:** Win Rate Target shows on Dashboard as black line in bar graph, making it easy to see when you are not hitting or exceeding set target. Revenue projections also show as black line in Revenue bar chart on Dashboard page.



Bid

Capability Matrix

The screenshot shows the 'Company Settings' page in the ONETeam application. The 'Bid' tab is selected, and the 'Capability Matrix' sub-tab is active. The table displays the following categories and ratings:

Category	Description	Ratings
Capability Level	Self-Rated Capability Level	Full, Partial, None
Past Performance	Relevant Past Performance	Prime, Sub, None
Technical Writing	Can Write Technical Approach	Lead, Assist, No
Customer Experience	Customer Experience	Similar Work, Different Work, None
Recency	Recency of cited contract	2 years, 3 years, 4 years, 5 years, 5-7 years, None
CPARS	Overall recent CPARS rating on relevant contract	Exceptional, Very Good, Satisfactory, Marginal, Unsatisfactory, Not available
Socio-Economic	SB Category	WOSB, SDVOSB, AbilityOne, HUBZone

Goal: Assess potential teaming partners based on quantitative analysis customized per RFP.

OneTeam: Create multiple categories with standard color-coded responses, that can be customized for each opportunity. Automatically tally combined team responses and make best teaming decisions.
Location: Menu, Bid Tab, Capability Sub-Tab

Actions: Develop custom Capability Matrix response choices.

Create or edit ratings including words and color coding.

Customize Capability Matrix based on data required to making teaming decision.

View each potential teaming partner's response alone, or in combination with other team members.

Play 'What-If' scenarios by selecting the best team with the best PWS coverage.

Automatically see team response combined without cutting and pasting.

Best Practice: Create the Capability Matrix early during Capture to gather information from potential teaming partners BEFORE signing Teaming Agreements.

The screenshot shows the 'Opportunities > Security Operations Center' page in the ONETeam application. The 'Capability Matrix' sub-tab is active. The table displays the following requirements and ratings:

Reference	Requirement	Notes	Capability Level	Past Performance	Customer Experience	Recency	CPARS
1	OCONUS Experience		7 Full ABC ECO	4 Prime ABC ECO	3 Similar Work ABC	2 2 years ECO	2 Exceptional ECO
PWS 3.1	The contractor shall support the Missile Defense Agency (MDA) in the development of logistics policy L...		3 Full ECO ISL	2 Prime ECO ISL	3 Similar Work ISL	3 2 years ECO	2 Exceptional OAS
PWS 3.2	GENERAL: This is a non-personal services contract to provide Work Reception and Management for th...		3 Full ECO ISL	4 Prime ABC ECO	2 Similar Work ECO	1 2 years ISL	7 Very Good ABC
PWS 3.3	Description of Services/Introduction: The Contractor shall provide all personnel, equipment, supplies, f...		4 Full ECO ITCDEN	2 Prime ABC SUB	2 Similar Work ECO	2 2 years ISL	3 Very Good ABC
PWS 3.4	Background: This service is currently being performed under Fort Stewart's Base Operations and Maint...		4 Full ECO ITCDEN	2 Prime ABC ECO	2 Similar Work ABC	1 2 years SUB	1 Exceptional ECO
PWS 3.5.1	Objectives: The basic service objective includes the following: Receive and annotate all repair work ne...		6 Full ABC ECO	2 Prime ABC RTI	2 Similar Work ABC	4 2 years Avion	1 Exceptional RTI
PWS 3.5.2	Submit Work Orders (WO) to Base O&M contractor as required.		1 Full RTI	2 Prime ISL SUB	2 Similar Work ISL	2 3 years ISL	1 Exceptional ISL
PWS 3.5.3	Provide daily, weekly, and monthly reports as needed.		4 Full ABC ISL	4 Prime ABC Avion	3 Similar Work ABC	1 2 years Avion	1 Exceptional RTI
PWS 3.5.4	Provide courteous, friendly customer service to all DPW customers.		4 Full ABC ISL	4 Prime ABC Avion	3 Similar Work ABC	1 2 years Avion	2 Exceptional ECO
PWS 3.6	Scope: Services includes: Establishing and tracking all requests for repairs and maintenance issues at F...		2 Full ISL RTI	1 Prime RTI	4 Similar Work Avion	1 2 years RTI	1 Exceptional RTI
PWS 3.7	Test requirement.						

Communication

Company Settings

Subscription | Organization | Capture | Dashboard | **Bid** | Services

Capability Matrix | **Communication** | Reviewer Ratings

+ Add [Delete] [Save]

Template Name	Type
01 Teaming Discussion Invitation	Invitation
02 Writer's Kick-Off Meeting	Information
03 Color Team Reviewer Kick-Off or In-Brief	Information
04 Capture Strategy Workshop	Information
05 Proposal Submitted	Information
AMCOM Express Industry Day Announcement	Information
Data Call #1	Data Call
Deletion Test	Data Call
Standalone Opportunity	Invitation

01 Teaming Discussion Invitation [Invitation]

Template Name 01 Teaming Discussion Invitation **Type** Invitation

Default Recipients None Selected + Add

Subject Opportunity: <% Name %> Teaming Discussion

Message

TRIDENT GROUP, INC., THE is considering forming a team to bid on this upcoming opportunity:

- Opportunity: <% Name %> (<% Acronym %>)
- Customer: <% Office %> at <% BuyingOrganization %>
- Final RFP: <% FinalRFP %>
- Primary NAICS: <% NAICS %>

If you are interested in discussing teaming opportunities and capabilities, follow the link in this invitation email to enter the OneTeam platform - this is where our company manages our Capture and Proposal efforts.

If you do not have a OneTeam account, you will be prompted to set up a free account. You will then be able to collaborate with our company on this opportunity. You will also be able to view additional information on this opportunity, including incumbent information.

This article will provide a step-by-step process to respond to our teaming invitation, add contacts for your company, complete an NDA, fill out a Capability Matrix for this opportunity, and 'Opt-In' to discussing this opportunity. [Respond to a Teaming Invitation \(oneteam.net\)](#)

Goal: Send emails to team regarding specific opportunity while maintaining the emails with the opportunity.

OneTeam: Create email templates, complete with dozens of auto-fill data points from OneTeam about the opportunity.

Location: Menu, Bid Tab, Communication Sub-Tab

Actions: Create custom communication templates for teaming invitations and information requests that auto-populate opportunity information.

Best Practice: Use Communication to send team-wide emails, such as review notices, win party, or to thank the BD Team.

The graphic below shows how the email looks as it is auto-filled with opportunity data.

Opportunities > SECURITY REPORTING SYSTEM

Details | Description | Contacts | Qualification | Notes | Documents | Review | Schedule | Team | Strategy | Proposal | Capability Matrix | **Communication**

New Message - [Cancel] [Save Draft] [Send]

Opportunity: SECURITY REPORTING SYS... [Invitation] New 7/10/2023

Donna Hamby [ABC]

Subject Opportunity: SECURITY REPORTING SYSTEM Teaming Discussion

Recipients

One or more selected Contacts are currently unable to view this opportunity

Donna Hamby [ABC] Emily Stone [ABC]

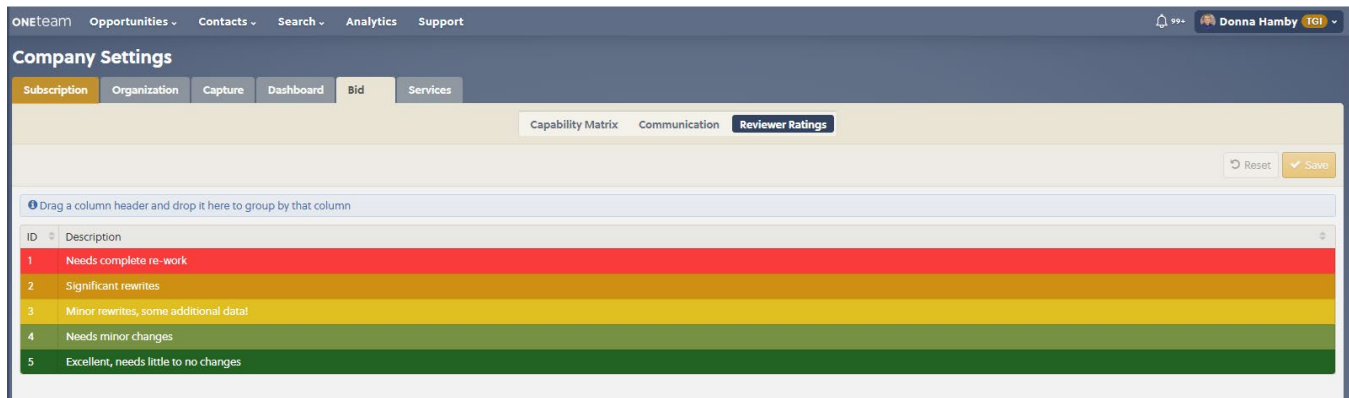
Message

COMPANY NAME is considering forming a team to bid on this upcoming opportunity:

- Opportunity: SECURITY REPORTING SYSTEM (SRS)
- Customer: CIO at GENERAL SERVICES ADMINISTRATION > FEDERAL ACQUISITION SERVICE
- Final RFP: 08/01/2022
- Primary NAICS: 541511: Custom Computer Programming Services
- 1073

If you are interested in discussing teaming opportunities and capabilities, follow the link in this invitation email to enter the OneTeam platform - this is where our company manages our Capture and Proposal efforts.

Reviewer Ratings



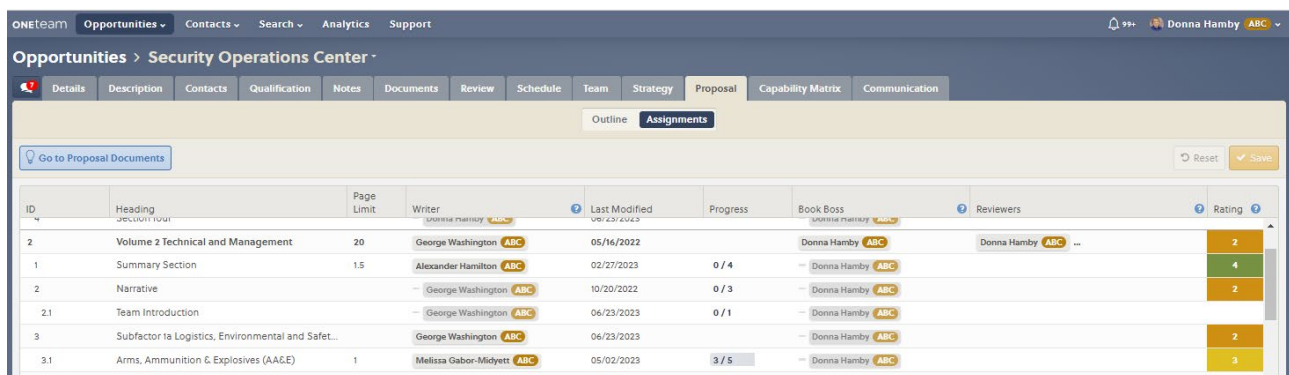
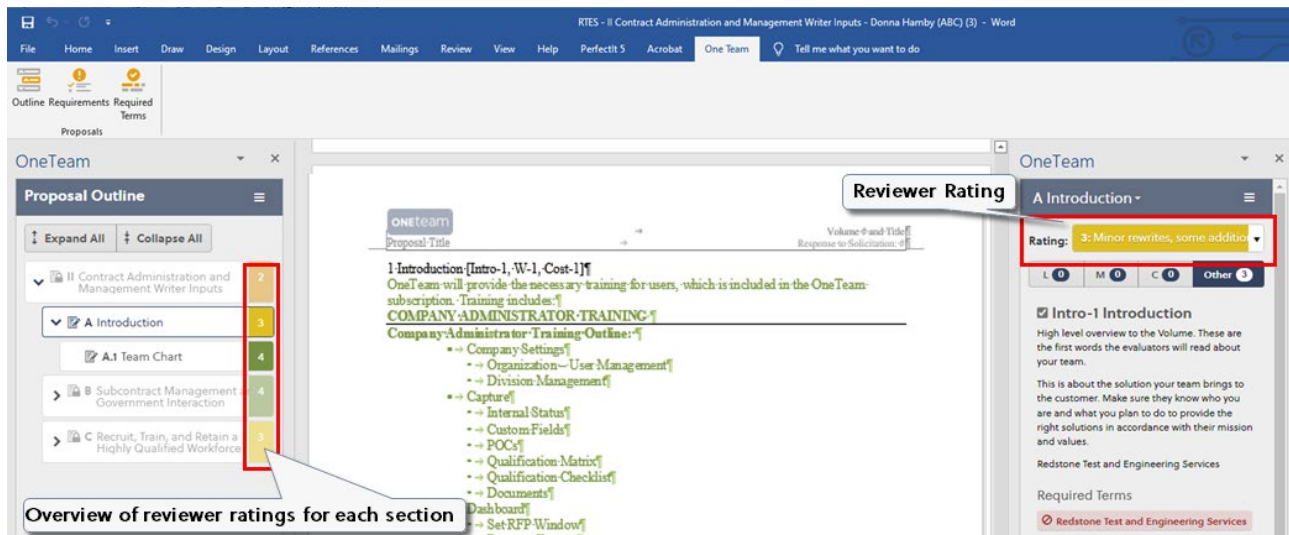
Goal: Set ratings that align with your BD process to use in color team reviews.

OneTeam: Edit words for color-coded ratings.

Location: Menu, Bid Tab, Reviewer Ratings Sub-Tab

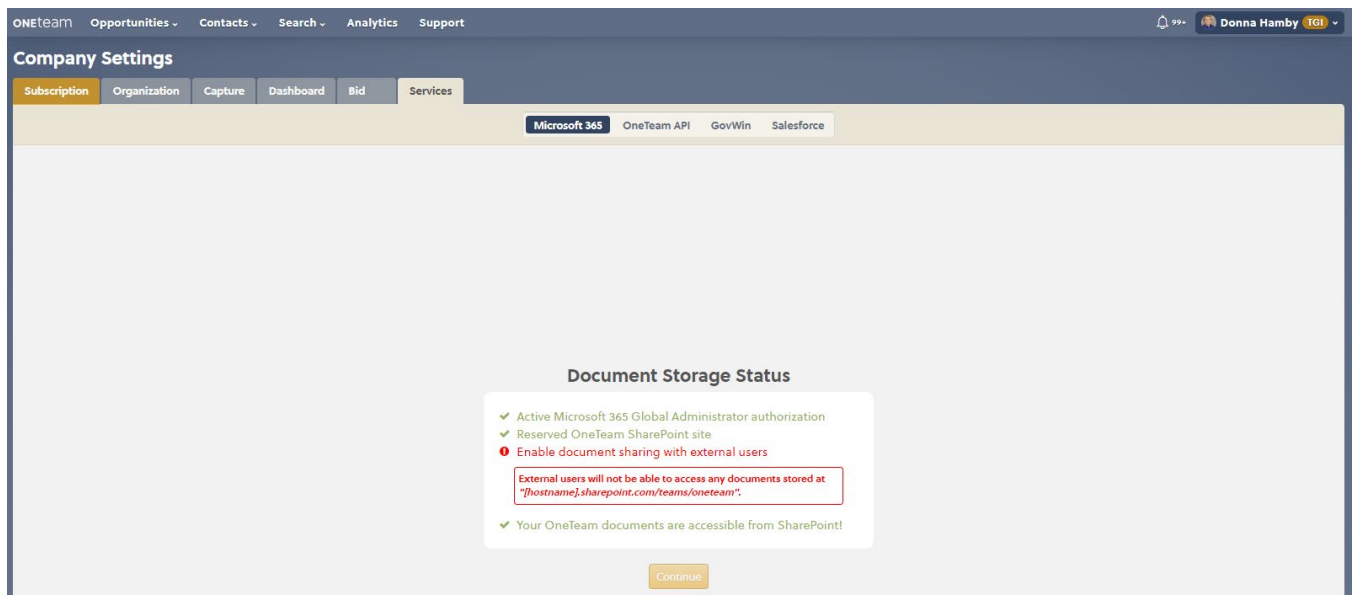
Actions: Edit descriptions of color-coded ratings.

Note: This is how the Reviewer Ratings appear in the OneTeam Word Add-In and in the Proposal Management Dashboard.



Services

Microsoft 365



Goal: Store your company's documents within your own Microsoft 365 (SharePoint Online) tenant rather than the default OneTeam storage.

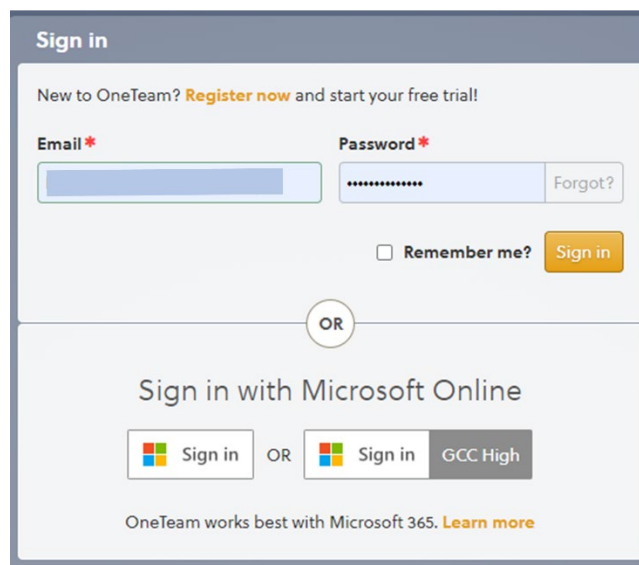
OneTeam: Enabling this feature integrates OneTeam with your Microsoft 365 tenant and migrates existing documents there.

Location: Menu, Services Tab, Microsoft 365 Sub-Tab

Actions: Enable Microsoft Online SSO

Note: Microsoft 365 must be enabled by OneTeam. Contact the Product Manager or Engineering Team through the Support function to enable Microsoft 365 for you company users.

The Sign-In window with Microsoft 365 enabled.



1.

OneTeam API

The screenshot shows the OneTeam application interface. At the top, there's a navigation bar with links: ONEteam, Opportunities, Contacts, Search, Analytics, and Support. On the right, there's a user profile for Donna Hamby. Below the navigation bar is a 'Company Settings' section with tabs: Subscription, Organization, Capture, Dashboard, Bid, and Services. The 'Services' tab is active, showing a sub-tab for 'OneTeam API'. Below this, there's a 'OneTeam API Status' section. It contains two input fields: 'Url' with the value 'https://api.oneteam.net' and 'Token' with the value 'api-token'. Below these fields is a 'Deactivate API' button.

Goal: Retrieve your opportunity pipeline data for use in external systems.

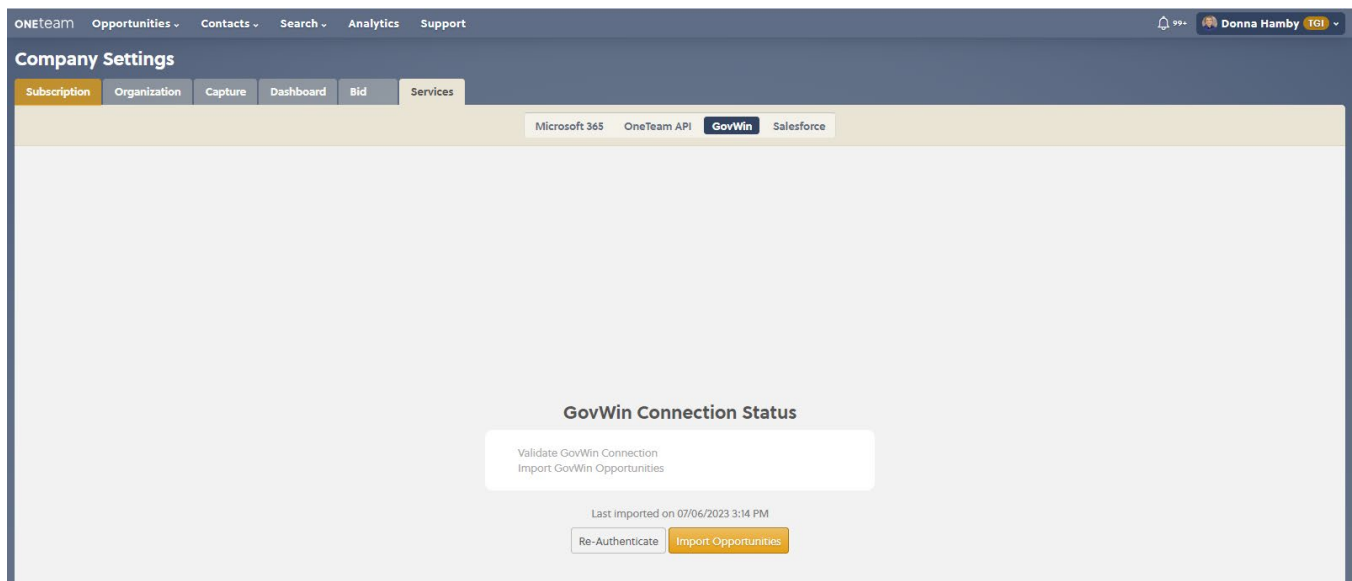
OneTeam: The OneTeam API allows you to securely pull your pipeline data into external systems for reporting purposes.

Location: Company Menu, Services Tab, OneTeam API Sub-Tab

Actions: Activate the OneTeam API to push OneTeam data to Power BI for performing analytics reporting. Use the API to integrate OneTeam data with your accounting system data for financial projections.

Follow the instructions at <https://support.oneteam.net/export-opportunity-data-to-power-bi-using-the-oneteam-api>

GovWin



Goal: View GovWin automatic connection status.

OneTeam: Validate GovWin connection status.

Location: Menu, Services Tab, GovWin Sub-Tab

Actions: Check last import date.

Update or Re-Authenticate GovWin token when expired.

Best Practice: Company OneTeam Administrators should be an appointment on their calendar to update the GovWin token every 30 days, so that they will not miss any updates from GovWin. When the token expires, your Pipeline Opportunities that are automatically updated via GovWin, will not be updated until the token is entered.

Note: When your GovWin token expires (every 30 days), you will see this box to connect your OneTeam account with GovWin.

The screenshot shows a 'Connect to GovWin' form. At the top, there's a navigation bar with links: Microsoft 365, OneTeam API, and GovWin. The 'GovWin' link is active. Below the navigation bar is the 'Connect to GovWin' section. It contains four input fields: 'Client ID' (with a red asterisk), 'Client Secret' (with a red asterisk), 'GovWin Username' (with a red asterisk), and 'GovWin Password' (with a red asterisk). Each field has a small 'x' icon to its right. Below the input fields is a 'Continue' button.

Salesforce

ONETeam Opportunities Contacts Search Analytics Support

Donna Hamby

Company Settings

Subscription Organization Capture Dashboard Bid Services

Microsoft 365 OneTeam API GovWin Salesforce

Connection Settings

Consumer Key*

Consumer Secret*

Custom Subdomain

Stage Filter

- Capture
- Gov't Cancelled
- Lead
- Lost
- Proposal
- Submitted
- Withdrawn
- Won

Save

- Goal:** Manage Salesforce integration settings.
- OneTeam:** Allows download of opportunities from Salesforce to OneTeam to build Opportunity Pipeline.
- Location:** Menu, Services Tab, Salesforce Sub-Tab
- Actions:** Follow the instructions at <https://support.oneteam.net/import-opportunities-from-salesforce> to implement the Salesforce integration
- Note:** Salesforce integration must be enabled by OneTeam. Contact the Product Manager or Engineering Team through the Support function to enable Microsoft 365 for you company users.

Company Profile

The screenshots show the ONETeam interface for editing a company profile. The top screenshot displays the full form for 'THE TRIDENT GROUP, INC.' with fields for Cage Code (3GGU6), DUNS (131987062), TIN, Legal Name, Acronym (TGI), DBA, Legal Entity, State Formed (Georgia), Year (2003), Web Site (http://www.tgi-us.com), and a logo. It also includes sections for Socio-Economic Status, Corporate Certifications, and Core Competencies. The bottom screenshot shows the same form with a user menu open for 'Donna Hamby', listing options like Company Settings, Company Profile, Account Settings, Admin, and Sign out.

- Goal:** Maintain Company information for viewing by potential teaming partners.
- OneTeam:** Add contract vehicles, NAICS codes, and company capability briefing to allow teaming invitations from potential teaming partners.
- Location:** Account Menu, Company Profile in drop-down menu
- Actions:** Upload company logo. Upload Corporate Capability Briefing.
Update contact information.
Create customized company biography.
Detail all corporate locations.
- Best Practice:** Keep information up-to-date to find potential teaming partners.

Profile

- Cage Code
- Legal Name
- Legal Entity – Corporation, LLC, Tribal, University, etc
- Logo
- DUNS
- Acronym
- DBA
- State Formed and Year
- TIN
- Website
- Capability Briefing
- Socio-Economic Status
- Corporate Certification
- Core Competencies
- Bio
- NAICS Codes
- Locations
- Contract Vehicles
- Experience