![Relevant Software logo]

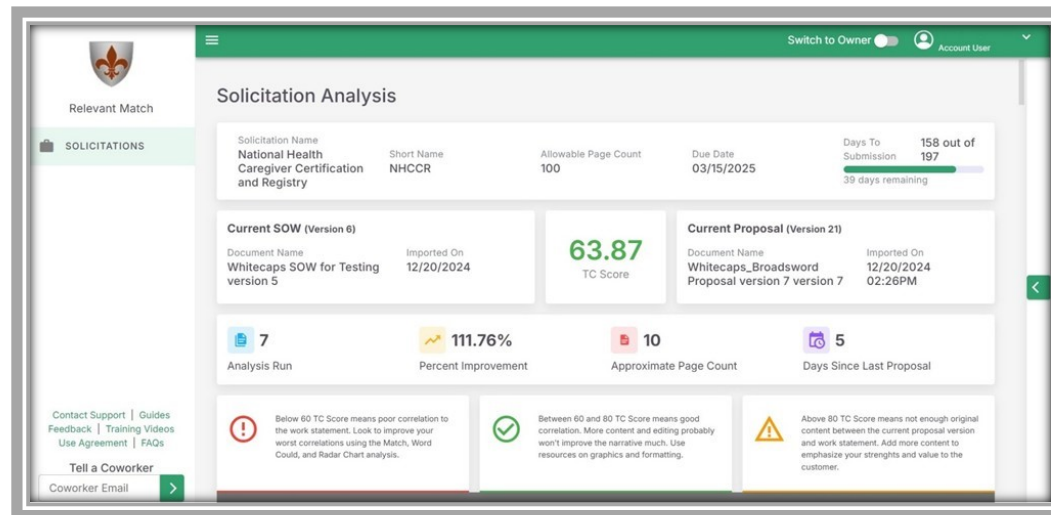# Relevant Match
Account Owner's Guide

Read this guide to:

1. **Set up a new solicitation dashboard**
2. **Import the solicitation work statement**
3. **Add Users and assign them to work the Proposal**

Release Version 202507.01

Contents

1. Introduction

This document is the Account Owner's Guide for Relevant Match, a web-based application to optimize the written proposals for competitive solicitations. Other documents for Relevant Match are:

Account User's Guide – available from the Relevant Match business website.

In RMO, there are two roles: **Account User and Account Owner.**
Account Users are the proposal managers, writers, editors, and reviewers. They all have the same permissions: to upload documents and run TC Score analysis. They work the content of the proposal.

For each subscription for your company, there is only one person in the **Account Owner** role, plus one backup person. Your company designates those persons by name and email address when it sets up the subscription. For a small proposal team, your company can assign both Account Owner and Account User roles to the same person. For a large proposal shop which works multiple proposals at the same time, you may have a manager in the role of Account Owner.

The Account Owner has only four critical tasks:
1. Enters the solicitation information into RMO
2. Assigns User to work the Solicitation.   Users can only work on the Solicitation they are assigned, so the Account Owner can keep concurrent efforts separated if desired.
3. Uploads the work statement from the Solicitation. In Standard format US Government solicitations, this is the Section C. (which may be titled "Statement of Work", "Performance Work Statement" or another local name.) But it can be any document which describes the work that the buyer wants done.
4. Serves as the single Point of Contact between your company and Relevant Software Corp.

Account Owner login permits the Account Owner to access screens and information that regular Account Users cannot. Regular Account User login allows users to access all the necessary features to perform solicitation and proposal analysis. Only the Account Owner has access to system administration and user management screens. When logged in as an Account Owner, the application displays "Account Owner" in the top-right corner of the window.

You should not share your Account Owner credentials—keep them private to maintain system security.

2. First-Time Login as an Account Owner

When you begin your subscription, you will be sent a temporary password. Your username will always be your company email. Navigate to www.relevantmatch.us

After your first login, you can change your password using the change password function.
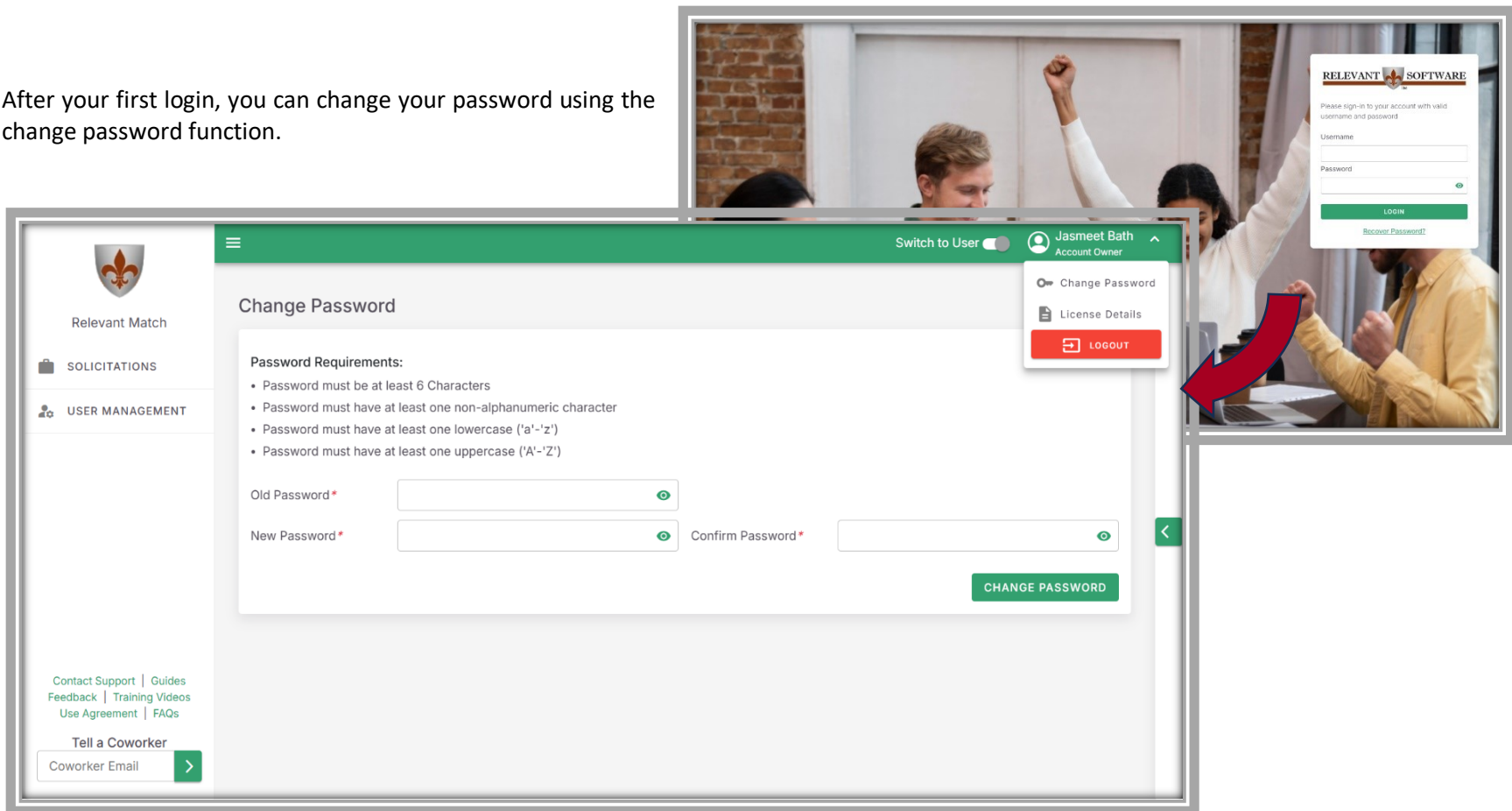
3. Recover Password

If you forget your password after changing it, you can recover it by following these steps. i

1. Click "**Recover Password?**" on the main login page.
2. Enter your **username** associated with your account and click "**Send OTP**".
3. You will receive a text message on the phone number linked to your username.
4. Enter the OTP from the text message and click "Verify"
5. Once verified, you will receive an email with your forgotten password.


Note: This password recovery function is optional – you are not required to use it. If you prefer, you can ask your account owner to contact RMO support, and we can resend your password via email. We only use your phone number for the password recovery function. We do not sell, disclose, or use your phone number for marketing or any other purposes.

4. RMO Main Screen.

When you log into RMO you will see the main screen:
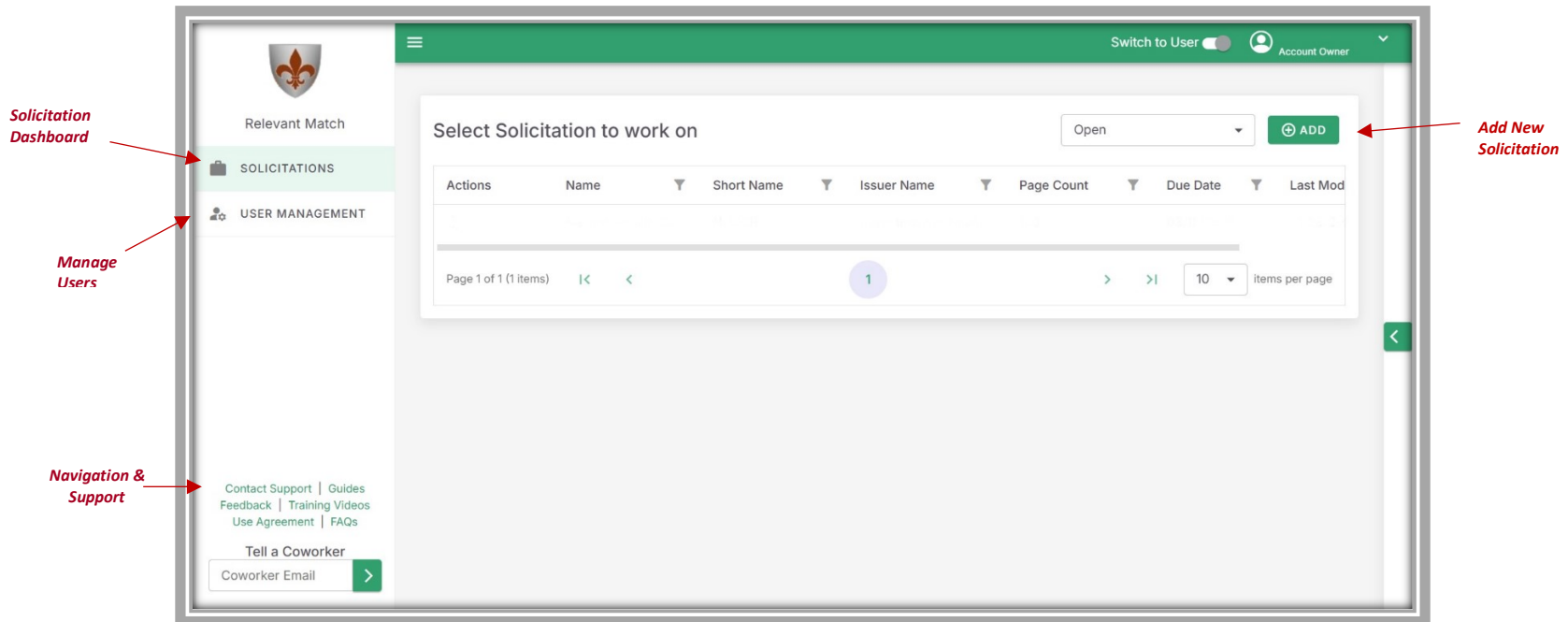
The main screen for an **Account Owner** provides a central dashboard for managing solicitations and users.

- **Solicitations Section**: Account owners can view, filter, and manage existing solicitations, as well as add new ones using the **"ADD"** button. The solicitation dashboard can be accessed at any time by clicking the **"SOLICITATIONS"** button in the sidebar.
- **User Management**: Account owners can add and manage users.
- **Navigation & Support**: The sidebar provides quick access to support resources, guides, training videos, feedback, and FAQs. There is also an option to invite coworkers via email.
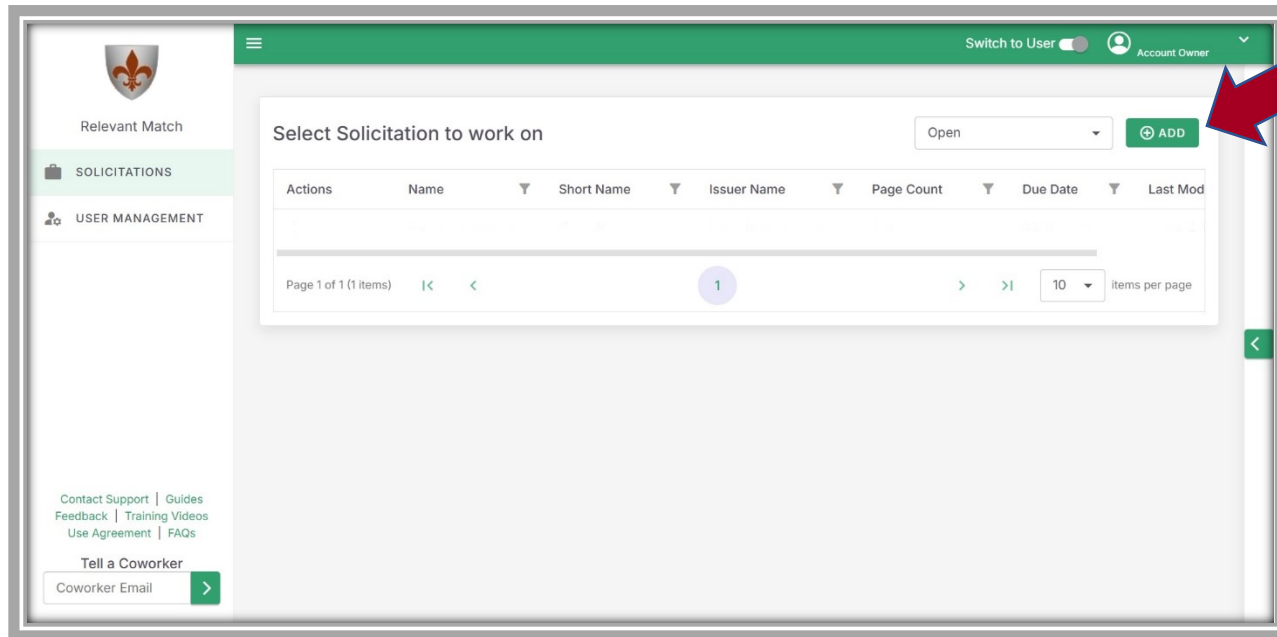
5. RMO Account Owner Steps

Six steps enable you set up your solicitation and have your team get ready to use Relevant Match Online.

Step 1. Start by adding a new solicitation. Click SOLICITATIONS in the Side-Bar Menu.
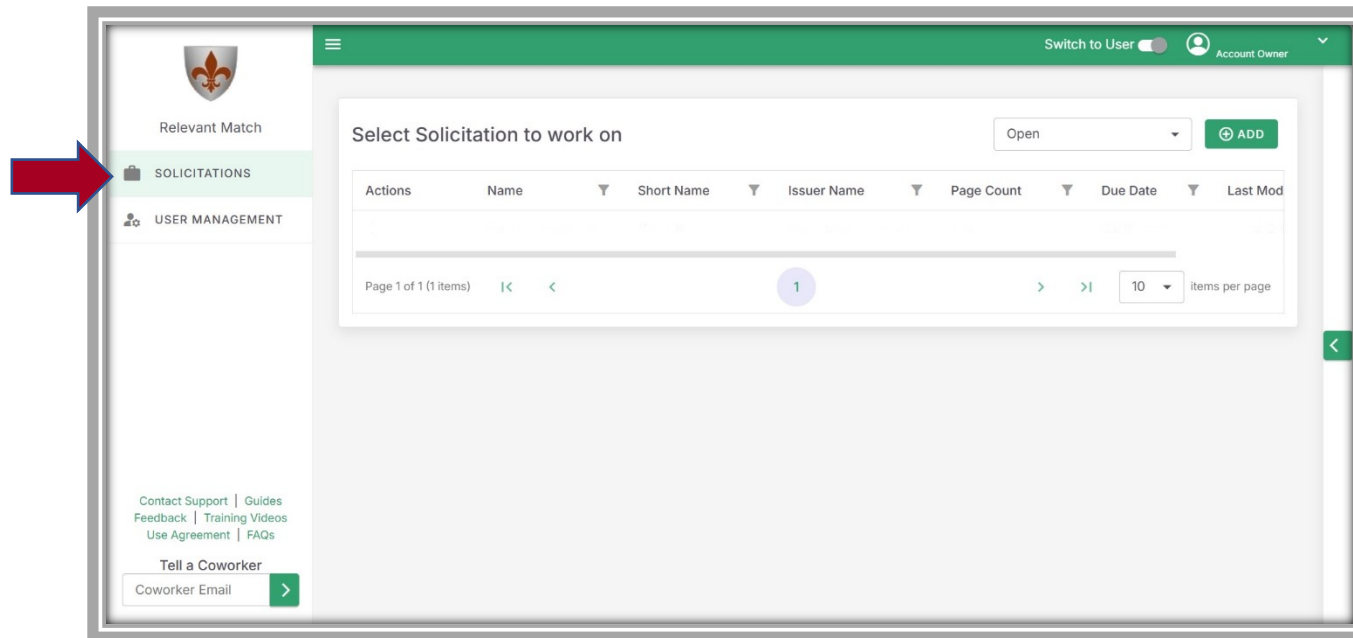
Step 2 Click "ADD".

Step 3 Fill in the Solicitation information. You cannot skip this step. All the information is important to keep track of the proposal versions for your specific solicitation.

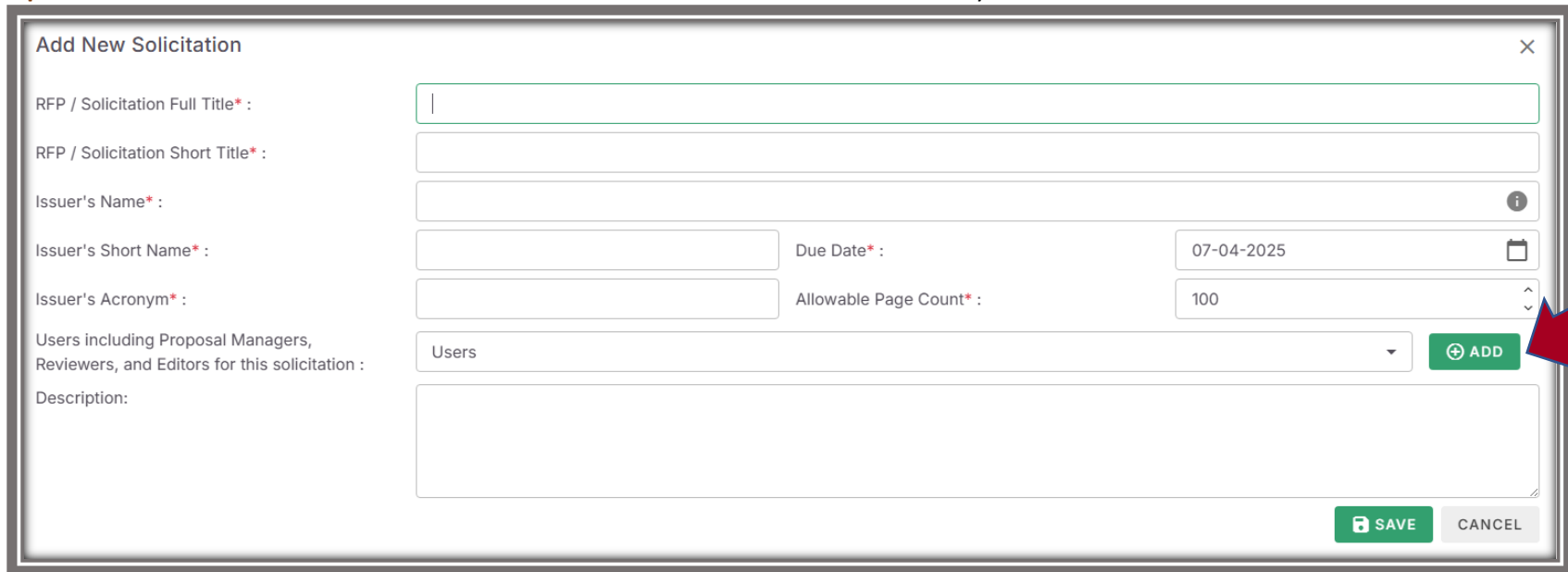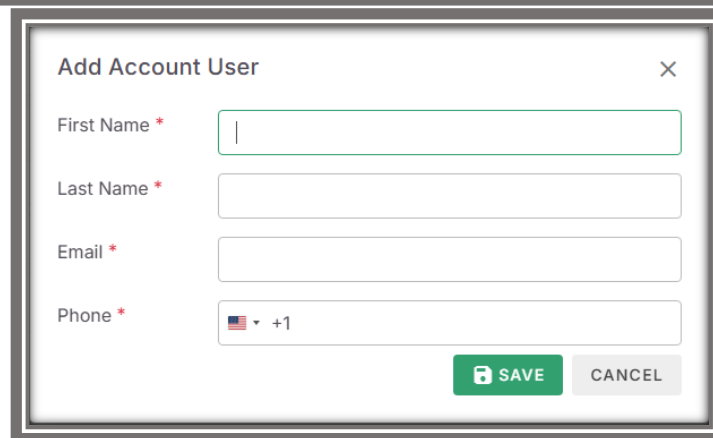| Add New Solicitation	✕
RFP / Solicitation Full Title* :	
RFP / Solicitation Short Title* :	
Issuer's Name* :	ⓘ
Issuer's Short Name* :	Due Date* : 07-04-2025 📅
Issuer's Acronym* :	Allowable Page Count* : 100
Users including Proposal Managers, Reviewers, and Editors for this solicitation :	Users ▾ ⊕ ADD
Description:	

💾 SAVE   CANCEL

Step 4 Click ADD to add users to the solicitation. Fill in the email information of the users you would like to add.

IMPORTANT! All Users must have the email domain from your company. Ensure their email domain matches the one used for your company or business. Emails from providers such as Gmail, Yahoo, AOL, Hotmail, or Live are not accepted. If you have an external consultant on your team with a different email domain, you will need to arrange for a temporary company email address. This is a security feature to add protection to your documents.

Examples for a subscription to RMO by the "ACME Technology Company" using the email domain "@ACMETech.com"
- ✓ Account Owner: Jane.Smith@ACMETech.com
- ✓ Proposal Manager/User: Tom.Blake@ACMETech.com
- X Proposal Manager/User: Tom.Blake@hotmail.com
- X Consultant/Prop Coordinator: Barry.Lane@LaneProposalConsultants.com
- ✓ Consultant/Prop Coordinator: Barry.Lane@ACMETech.com

As the Primary Owner, you have the option to assign a user the role of Secondary Owner, granting them admin capabilities. This can be found in the "USER MANAGEMENT" page on the side-bar menu.

Step 5 Now that you have successfully added users and inputted the solicitation information click the SAVE button

Add New Solicitation ✕

RFP / Solicitation Full Title* :	
RFP / Solicitation Short Title* :	
Issuer's Name* :	ⓘ
Issuer's Short Name* :	Due Date* : 07-04-2025 📅
Issuer's Acronym* :	Allowable Page Count* : 100
Users including Proposal Managers, Reviewers, and Editors for this solicitation :	Users ▾ ⊕ ADD
Description:	

💾 SAVE   CANCEL

Note on Re-Adding Deleted Solicitations:

If an Account Owner deletes a solicitation and later decides to re-add the same solicitation into Relevant Match Online (RMO), they must modify the **RFP/Soliciation Full Title** by including a version number or unique identifier. This prevents conflicts with previously deleted entries and avoids the "Duplicate Name" error. For example, if the original title was "ACME Request for Proposal", the re-added title could be "ACME Request for Proposal v2"

Step 6. Now import the Work Statement by clicking the Import button.

To upload a **Work Statement** document, you have two options:

Drag and Drop – Simply drag the file from your computer and drop it into the designated upload box.
**File Explorer** – Click anywhere inside the upload box to open your computer's file explorer, then select the document you wish to upload.

Once the file is uploaded, the system will display the following details:

- **Document Name** – The name of the uploaded file.
- **File Name** – The exact file name as it appears on your computer.
- **Uploaded On** – The date the file was uploaded.
- **Uploaded By** – The user who uploaded the file.

After uploading, click **"PROCESS"** to finalize the import, or **"CANCEL"** to discard the upload.

After these six steps, the Account Owner has no further actions unless something changes, with a Solicitation amendment, a change of Users, or a needed change to the Relevant Match subscription. The User's are free to log in, add proposal drafts, and run analyses. The Users cannot change the solicitation information, or upload a different Work Statement.
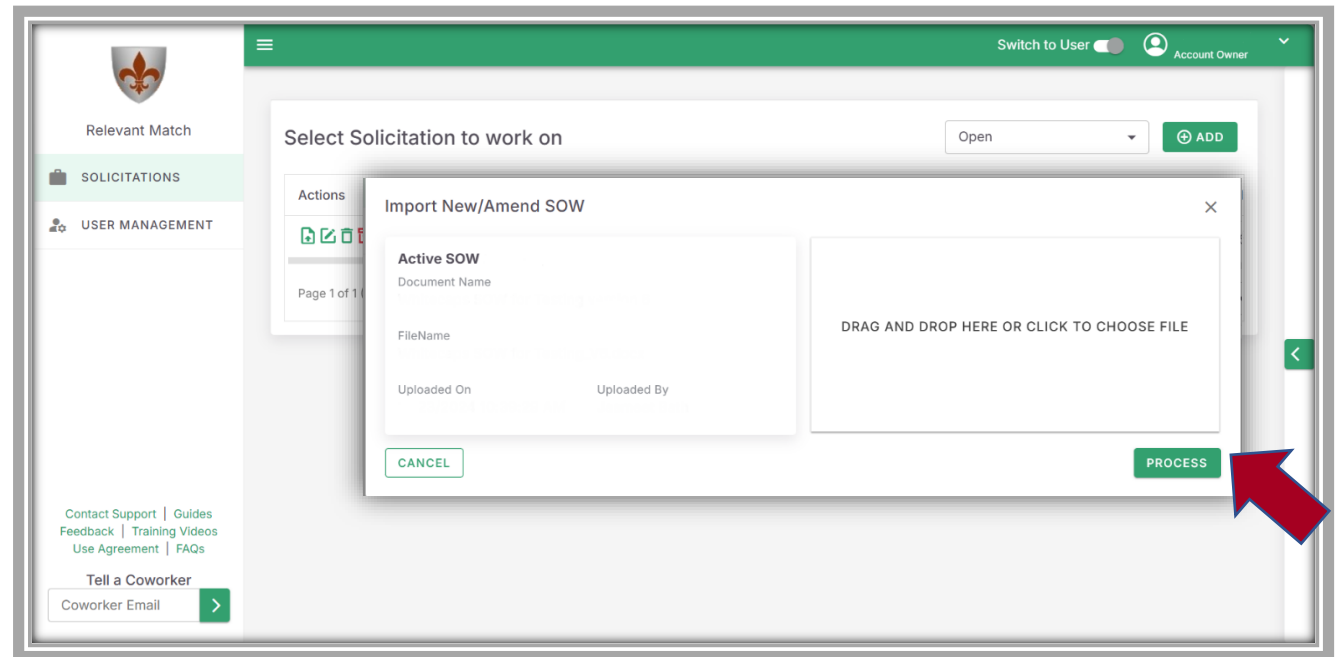
6. Assigning yourself to a Solicitation

The Account Owner is responsible for importing the Statement of Work, registering solicitation details, and managing user access.

The Account Owner may also assign themselves as a User and toggle between roles. By doing so, you can actively participate in the proposal analysis process by importing and reviewing proposals within the system. This functionality allows the Account Owner to engage with the application as both an administrator and an active user.
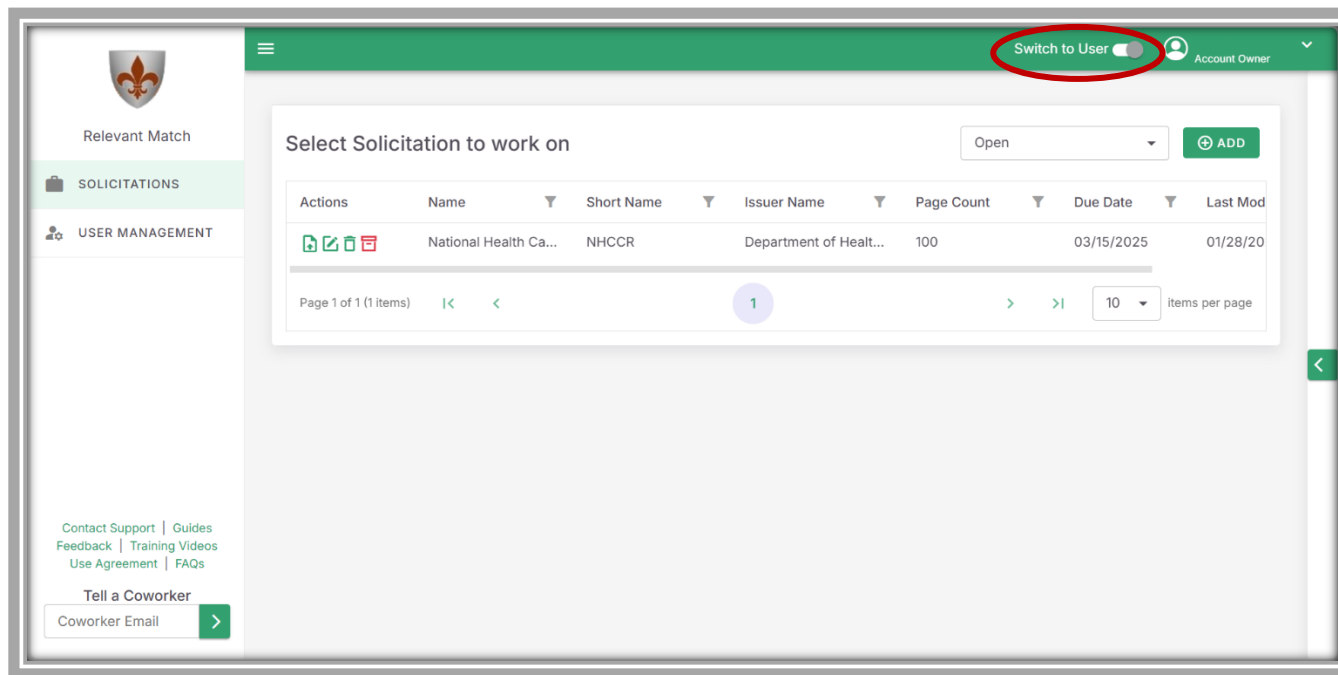
7. Subscription Details Overview

Your account operates under a subscription model that determines the number of solicitations and users allowed per solicitation. To ensure transparency, you can view your subscription details at any time within the application.

1. **Log in** to your Relevant match Online account.
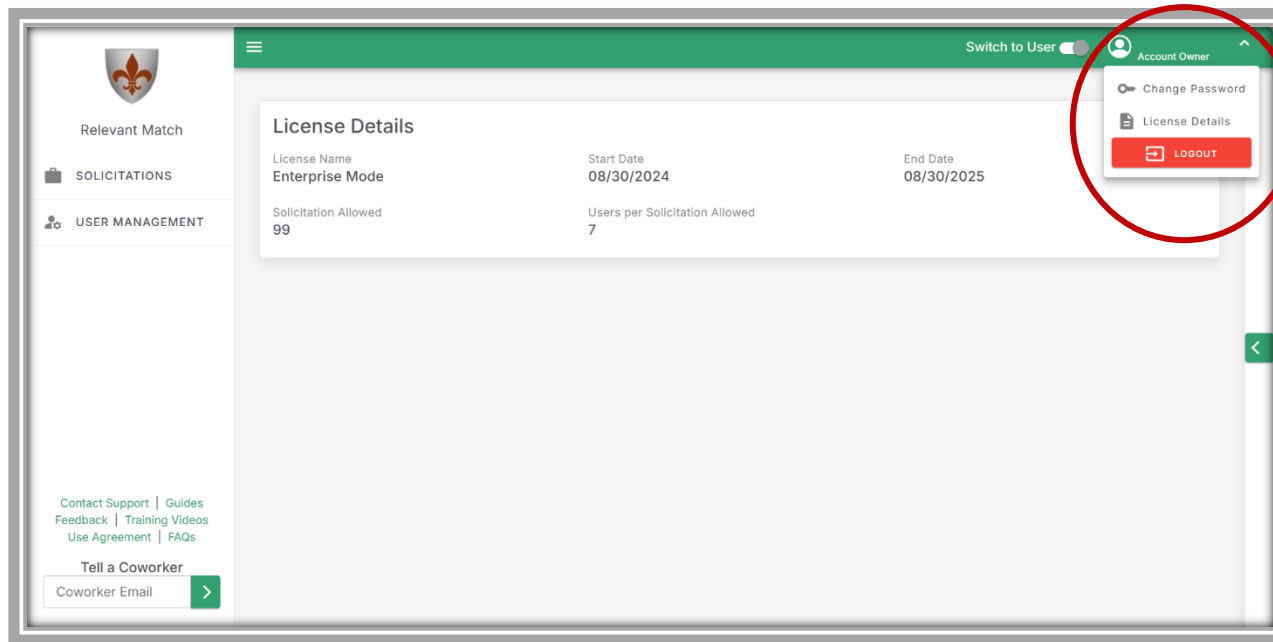2. Click on your **profile name** in the top-right corner of the screen.
3. In the dropdown menu, select "**Subscription Details**"

A summary of your subscription will be displayed, including:

- **Subscription Name** (e.g., Enterprise Mode)
- **Start and End Dates** of your subscription period
- **Solicitation Allowed** (Total Number of solicitations available)
- **Users per Solicitation** Allowed (Maximum users allowed per solicitation)

If you have any questions or need to upgrade your subscription, please contact Relevant Software support through the **Contact Support** link in the application.

8. Account Owner vs. Account User

Here's a side-by-side table comparing the functions, actions, and steps for an **Account Owner** and an **Account User** in **Relevant Match Online**:

Function	Account Owner	Account User
Access Subscription Details	Click profile > Select "Subscription Details"	Not Permitted
Manage Users	Go to "User Management" > Add, remove, or modify users	Not Permitted
Create Solicitations	Go to "Solicitations" > Click "Create New"	Not Permitted
Manage Solicitations	View, edit, or delete any solicitation	Not Permitted
Assign Users	Assign Users to specific solicitations	Not Permitted
Switch to User Mode	Toggle "Switch to User" in profile menu	Not Permitted
Import Proposal	Not Permitted (unless Owner is assigned to solicitation as a User)	Import Proposal on Dashboard or Analysis Screen
Generate Report	Not Permitted (unless Owner is assigned to solicitation as a User)	Bottom of Analysis Screen
View Previous Analysis Runs	Not Permitted (unless Owner is assigned to solicitation as a User)	Go to Dashboard and view Run Table
Change Password	Click profile > "Change Password"	Click profile > "Change Password"
Refer a Coworker	Enter coworker's email in "Tell a Coworker" Section	Enter coworker's email in "Tell a Coworker" Section
Logout	Click profile > "Logout"	Click profile > "Logout"

9. Troubleshooting Tips

If you encounter any issues while using Relevant Match Online – such as the application freezing, pages not loading property, or certain features not working as expected – try the following steps:

Basic Steps
1. Clear Your Browser's Cache and Cookies
   - ➢ Over time, stored data can interfere with new updates or functionality. Clearing your cache and cookies often resolves strange behavior or loading issues
2. Try a Different Web Browser
   - ➢ RMO is optimized for modern browsers such as Google Chrome, Mozilla Firefox, and Microsoft Edge. If you're using an outdated or unsupported browser (like Internet Explorer), switching may resolve your issue, or just switching between browsers can help.
3. Refresh the Page or Restart the Browser
   - ➢ Sometimes, simply refreshing the browser tab or closing and reopening the browser can clear temporary glitches.
4. Check your internet Connection
   - ➢ A slow or unstable internet connection may cause the application to freeze or not load content properly. Make sure you're connected to a reliable network.
5. Disable Browser Extensions
   - ➢ Some browser add-ons (like ad blockers or script blockers) may interfere with certain RMO features. Try disabling them temporarily to see if that resolves the issue.

Advanced Suggestions
1. Use an Incognito or Private Window
   - ➢ This allows you to bypass most cached data and browser extensions, providing a clean environment for testing if the issue is local to your browser session.
2. Ensure JavaScript is Enabled
   - ➢ Make sure JavaScript is enabled in your browser settings.
3. Keep your Browser Updated
   - ➢ Always use the latest version of your browser to ensure full compatibility with all RMO features and security patches.
4. Check for System Updates or Firewall Restrictions
   - ➢ Occasionally, operating systems or corporate firewall policies may affect web app performance. If you're using a work-issued device, consult your IT department if the issue persists.

Still Need help?

If none of the above steps resolve your issue, please reach out to the RMO support team at support@relevantsoftware.us or go to https://relevantsoftware.us/support and submit a support ticket.

Your suggestions for changes and improvements are important to us. Visit our website to let us know.

Relevantsoftware.us

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With talent throughout the United States of America
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