

RFP Response Assistant - AppExchange Test Guide

Test Opportunity Details

Below are the details to test the RFP Response Assistant application in Salesforce.

Testing Data: (Use it for testing purposes only)

- **Opportunity Name:** 'CRMIT SLA'
- **Opportunity ID:** '006g5000000GDfIAAG'
- **Salesforce Oppo Link:** [Opportunity Link](#)
- **Salesforce RFP Link:** [RFP Link](#)
- **Sample RFP Document :** [Sample RFP Document](#)

Note: You can use the existing setup or create your own opportunity and rfp for testing.

- The Opportunity and RFP are already configured. Use the **above** links to start testing.
- To create your own workflow and RFP, refer to the Steps mentioned in the document below.

RFP Response Assistant - AppExchange Test Guide

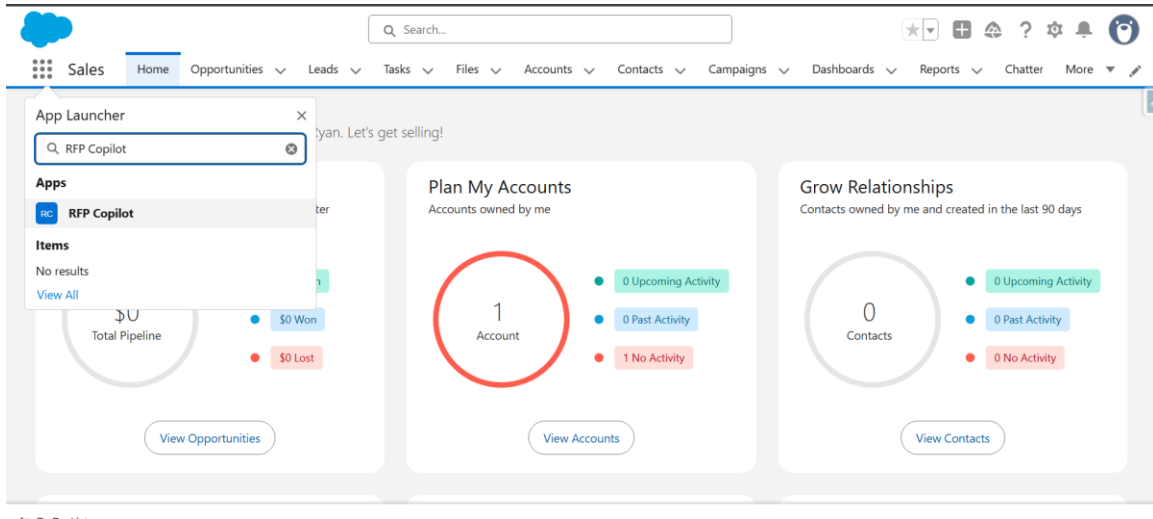
This document provides step-by-step instructions for the AppExchange team to test the RFP Response Assistant solution. If you use the application for the first time, please ensure all required prerequisite configurations have been completed.

Step 1: Log into Salesforce Org

Log in to your Salesforce org using your credentials.

Step 2: Launch RFP Response Assistant App

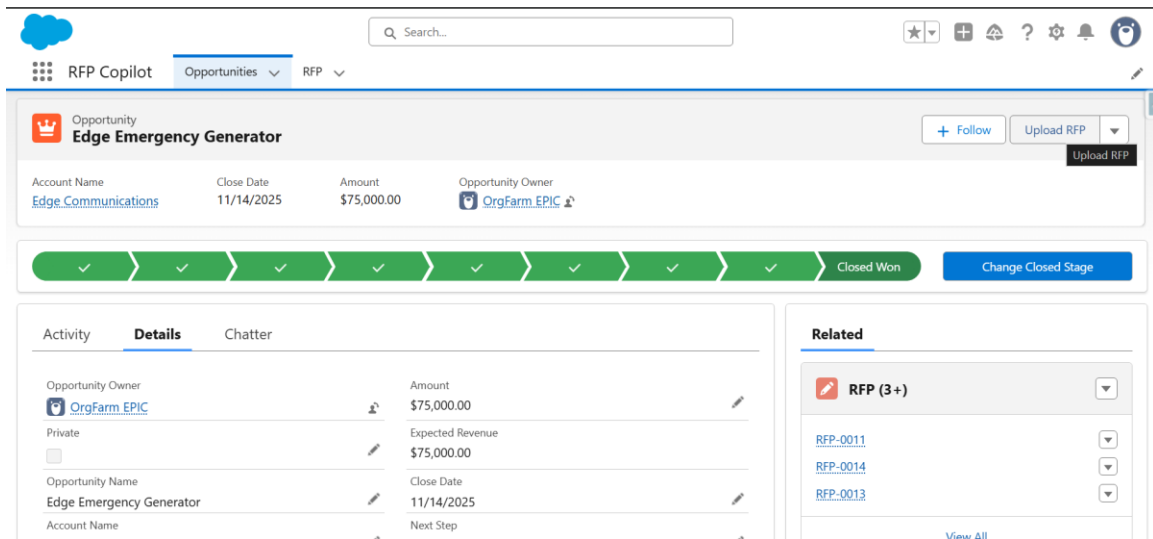
1. Click on the App Launcher (grid icon) at the top-left corner.
2. In the search bar, type "RFP Response Assistant".
3. Select the RFP Response Assistant app from the results.
4. Open Opportunity record, Opportunity Name: '**CRMIT SLA**'.



Step 3: Validate the “Upload RFP” Button on the Opportunity Record

1. On the Opportunity record page, locate the **Upload RFP** button in the top-right corner.
2. Click the button and upload the provided sample RFP document.

Ensure that the upload window and file selection process display correctly.



Step 4: Verify New RFP Record Creation

1. After selecting the RFP file, click **Continue**.
2. The system should automatically redirect to a newly created **RFP record page**.

3. Confirm that the **RFP File Name** field is populated with the uploaded document name.

The screenshot shows the RFP Copilot interface. At the top, there's a search bar and navigation tabs for RFP Copilot, Opportunities, RFP, and CRMIT Solutions | Account. Below the navigation, there's a header for RFP-0012 with buttons for Search Answer and Download RFP. The main content area is divided into Details and Related sections. The Details section shows a table with fields: RFP ID (RFP-0012), Company (CRMIT Solutions), Total Questions (50), Finalized Questions (0), RFP File Name (Salesforce_RFP_Questions.pdf), Opportunity (CRMIT SLA), Status (In-Progress), and Pending Questions (50). Each field has an edit icon. Below the table is a System Information section showing Created By (Ryan Ahmed) and Last Modified By (Ryan Ahmed).

Digitization Process:

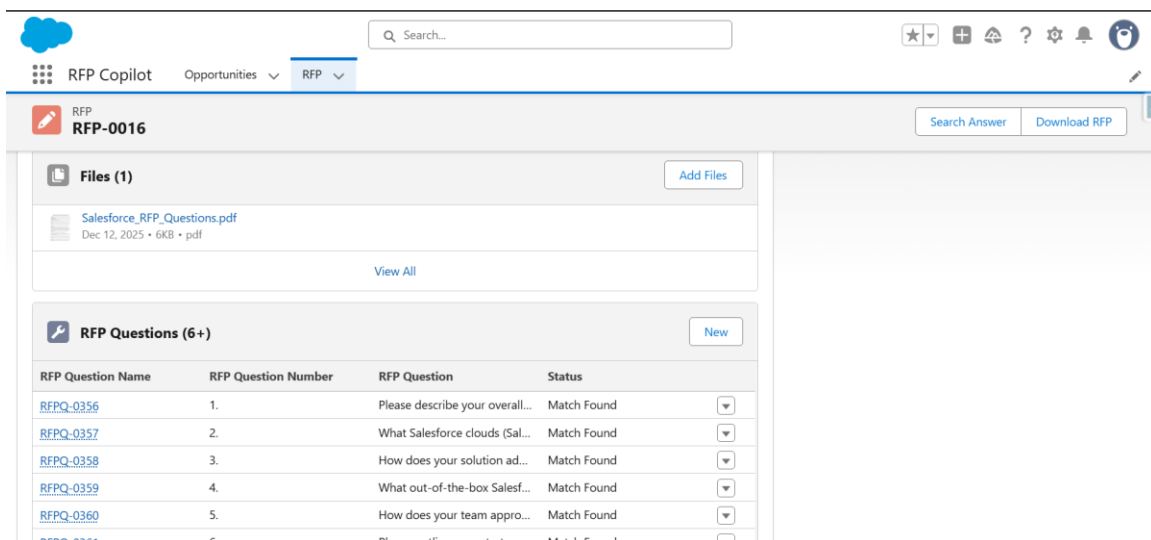
The RFP digitization may take **1–2 minutes**, depending on the document size. You will receive an **email notification** upon completion.

The screenshot shows an email notification titled "RFP Digitization is Completed" with a yellow arrow icon and an "Inbox x" label. Below the title is a button that says "Summarize this email". The email is from Ryan Ahmed via a Salesforce email address. It says "Hello Ryan Ahmed," and "Your RFP document has been successfully digitized and processed." It also includes a link to "RFP-0017" and ends with "Best regards". At the bottom, there are buttons for "Reply" and "Forward".

Step 5: Review Digitized RFP Questions & Suggested Responses

1. Open the link provided in the email notification—it should take you directly to the associated RFP record.
2. Verify the following fields:

- **Total Questions**
 - **Pending Questions**
 - **Finalized Questions**
3. Navigate to the **Related** tab and scroll to the **RFP Questions** section. Verify that all digitized questions are listed.
 4. Click **Search Answer** (top-right corner).
 5. Scroll through the suggested responses and finalize multiple questions.



The screenshot shows the RFP Copilot interface. At the top, there is a search bar and navigation tabs for 'RFP Copilot', 'Opportunities', and 'RFP'. Below the navigation, the 'RFP' tab is selected, showing 'RFP-0016'. There are buttons for 'Search Answer' and 'Download RFP'. The main content area is divided into two sections: 'Files (1)' and 'RFP Questions (6+)'. The 'Files' section shows a PDF file named 'Salesforce_RFP_Questions.pdf'. The 'RFP Questions' section contains a table with the following data:

RFP Question Name	RFP Question Number	RFP Question	Status
RFPQ-0356	1.	Please describe your overall...	Match Found
RFPQ-0357	2.	What Salesforce clouds (Sal...	Match Found
RFPQ-0358	3.	How does your solution ad...	Match Found
RFPQ-0359	4.	What out-of-the-box Salesf...	Match Found
RFPQ-0360	5.	How does your team appro...	Match Found
RFPQ-0361	6.	Please outline your strate...	Match Found

- **Search Answers Component**

CRMIT SLA

All 

Question 4 of 51

4. What out-of-the-box Salesforce functionalities will be leveraged, and what areas will require customization?

 Dec 09, 2025, 11:56 AM

This is the selected answer

Matching Score: 0.97





We maximize out-of-the-box functionality including standard objects, page layouts, record types, validation rules, and workflow rules. We leverage Flows for complex automation to minimize custom code. Customization is applied strategically for unique requirements such as custom objects for domain-specific data, Apex triggers for business logic that cannot be handled declaratively, Lightning Web Components for UI enhancements requiring AppExchange compliance, and REST API integrations for external system connectivity.

Previous Question

Next Question

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- Click on the edit icon to edit a matching answer

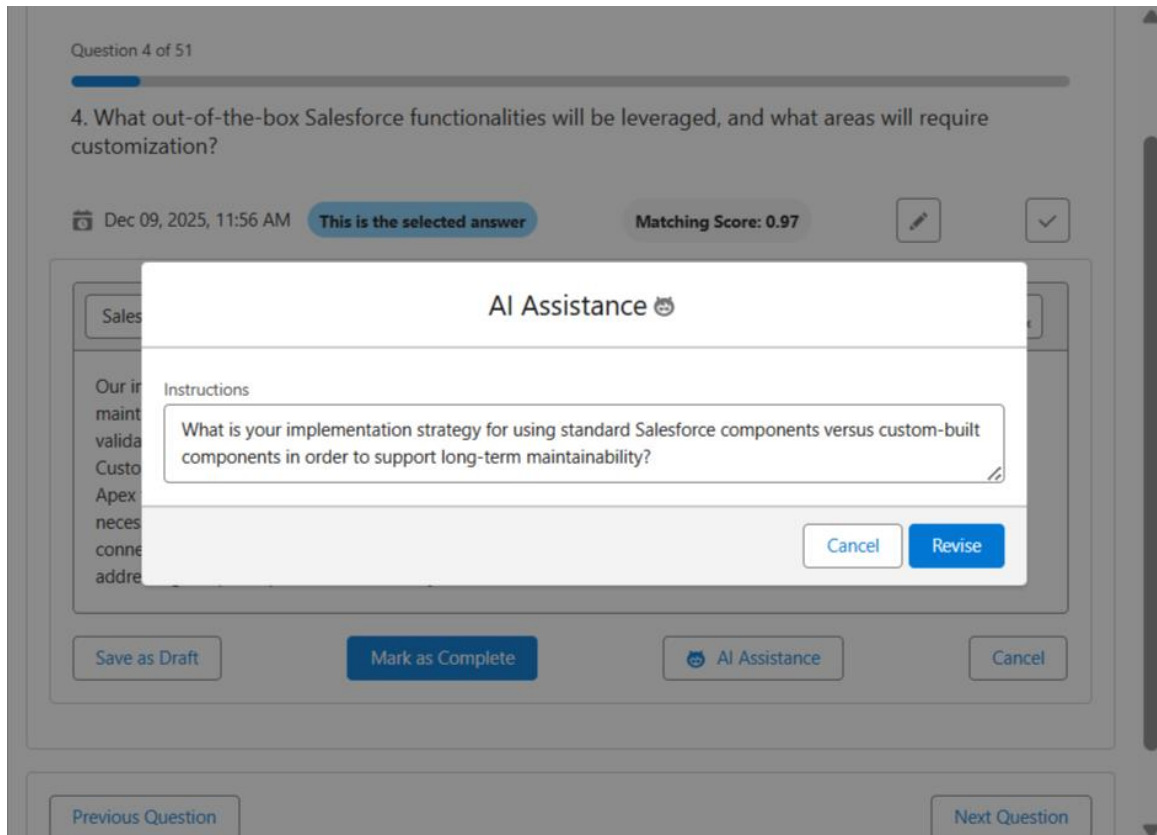
 CRMIT SLA All 

Question 4 of 51

4. What out-of-the-box Salesforce functionalities will be leveraged, and what areas will require customization?

 Dec 09, 2025, 11:56 AM **This is the selected answer** **Matching Score: 0.97**  

Salesforce Sans 12 B I U                          



Step 6: Validate Status Updates After Finalization

After finalizing multiple answers, confirm that each question's **Status** automatically updates to **Completed**.

CRM Copilot Interface - RFP-0012

Details | **Related**

Files (1) [Add Files](#)

Salesforce_RFP_Questions.pdf
Dec 8, 2025 • 6KB • pdf

[View All](#)

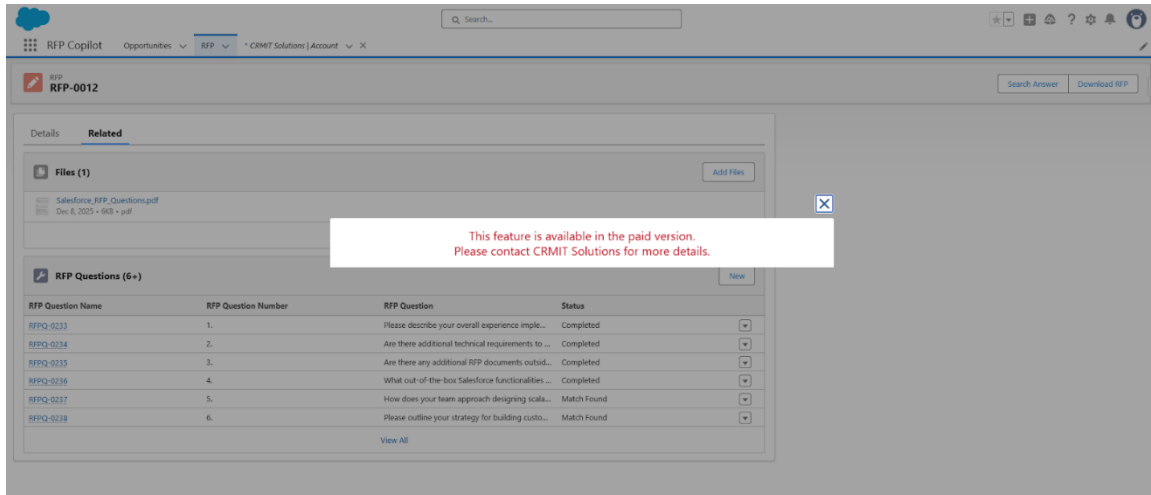
RFP Questions (6+) [New](#)

RFP Question Name	RFP Question Number	RFP Question	Status
RFPQ-0233	1.	Please describe your overall experience...	Completed
RFPQ-0234	2.	Are there additional technical requireme...	Completed
RFPQ-0235	3.	Are there any additional RFP documents ...	Completed
RFPQ-0236	4.	What out-of-the-box Salesforce function...	Completed
RFPQ-0237	5.	How does your team approach designin...	Match Found
RFPQ-0238	6.	Please outline your strategy for building ...	Match Found

[View All](#)

Step 7: Verify “Download RFP” Button <This feature is available in the paid version>

Return to the RFP record page and confirm the presence and functionality of the **Download RFP** button.



The screenshot displays the RFP Copilot interface for RFP-0012. The top navigation bar includes the RFP Copilot logo, a search bar, and a 'Download RFP' button. The main content area is divided into 'Details' and 'Related' tabs. Under 'Details', there is a 'Files (1)' section showing a PDF file named 'Salesforce_RFP_Questions.pdf'. Below this is a table of RFP Questions (6+). A modal message is displayed over the table, stating: 'This feature is available in the paid version. Please contact CRMIT Solutions for more details.'

RFP Question Name	RFP Question Number	RFP Question	Status
RFPQ-0232	1.	Please describe your overall experience imple...	Completed
RFPQ-0234	2.	Are there additional technical requirements to ...	Completed
RFPQ-0235	3.	Are there any additional RFP documents outsid...	Completed
RFPQ-0236	4.	What out-of-the-box Salesforce functionalities ...	Completed
RFPQ-0237	5.	How does your team approach designing scala...	Match Found
RFPQ-0238	6.	Please outline your strategy for building custo...	Match Found