# RFP Response Assistant– Managed Package Installation & Setup Guide

This document provides **step-by-step instructions** to install, configure, and validate the **RFP Response Assistant** managed package, which leverages **Salesforce Data Cloud Hybrid Search** to retrieve previously answered RFP responses.

## 1. Prerequisites

Before installing the RFP Win Assistant package, ensure the following requirements are met:

- You have **System Administrator** access
- API Access is enabled for the org
- Salesforce **Data Cloud is enabled**
- Required licenses are available:
    - Salesforce Data Cloud
    - Einstein 1 / Agentforce / Data Cloud credits (as applicable)
- Permission to install **AppExchange Managed Packages**

## 2. Package Installation Steps

1. Open the **AppExchange listing** for *RFP Win Assistant*
2. Click **Get It Now**
3. Choose the target org (**Production** or **Sandbox**)
4. Log in with administrator credentials
5. Select installation access:
    - Admins Only (Recommended)
6. Review and approve required access permissions
7. Click **Install**
8. Wait for installation to complete
9. Click **Done** to return to Installed Packages

## 3. Post-Installation Permission Setup

Assign the packaged permission sets to relevant users**:**

- **RFP Response Assistant**

**Steps:**

1. Go to **Setup → Permission Sets**
2. Open each permission set
3. Click **Manage Assignments**
4. Assign to appropriate users

## 4. RFP Master Data Preparation

Prepare the dataset containing previously answered RFPs.

**Required Fields:**

- Question (Text)
- Answer (Text)
- RFP ID (Unique)
- RFP Name (Text)
- RFP Date (Date)
- Category (Optional)
- Industry (Optional)

## 6. Upload RFP Data to Data Cloud

### Option 1: File Upload via UI

1. Go to **App Launcher → Data Cloud**
2. Select **Data Streams** tab
3. Click **New** → Select **File Upload**
4. Upload CSV / Parquet file
5. Map fields to Data Model Object (DMO)
6. Activate the Data Stream
7. Confirm status = **Completed**

### Option 2: API Upload via Postman (Optional)

Used for automation or large datasets.
High-level steps:

- Generate OAuth token using Connected App
- Call Data Cloud ingestion API
- Monitor Data Stream status

## 7. Configure Data Mapping & Custom DMO

1. Open the active Data Stream
2. Click **Start Mapping**
3. Select **Custom Data Model**
4. Auto-create Custom DMO
5. Save mappings

## 8. Create Search Index (Mandatory)

Creating a Search Index enables **Hybrid Search (keyword + vector)**.

**Steps:**

1. Go to **Data Cloud → Search Index**
2. Click **New** → Advanced Setup
3. Select **Hybrid Search**
4. Choose RFP Custom DMO
5. Select Question & Answer fields
6. Save and wait for status = **Active**

## 9. Configure RFP Copilot Custom Metadata

Navigate to **Setup → Custom Metadata Types → RFP Copilot Configuration** and create a record with:

- SQL Query
- Question Field API Name
- Answer Field API Name
- Vector Score Field API Name
- Named Credential Name
- Matching Score Threshold

## 10. Testing & Validation

### Query Editor Validation

1. Go to **Data Cloud → Query Editor**
2. Run a sample Hybrid Search query
3. Verify:
    - Records returned
    - Vector score populated
    - Keyword score populated
    - Hybrid ranking applied