

OneTeam InSights

Software Releases & New Features

We had a software release on April 28th to give clients additional capabilities for capture and proposal functions.

New Feature

Custom Fields can be Required Fields

OneTeam was designed to be customized to individual companies' terminology and BD processes.

One great feature we added in 2021 was Required Fields, which designates fields that are required to be populated in order to be designated as a specific Stage. This helps the Capture and Proposal Managers gather information that is required for Gate Reviews, meetings, or reporting as they move through the BD process.

Another feature many clients use is Custom Fields, for collecting and organizing data that is not a default OneTeam field. Until recently, the only fields that could be designated as Required Field in Company Settings were default fields.

Company Administrators designate if certain fields are required, for a specific Stage in the Opportunity lifecycle. For example, a company can determine that for an opportunity to be in Proposal Stage, it must have an estimated RFP date. Users can designate one or multiple Required Fields for one or all Stages.

With the latest software release, we have expanded the Required and Customer Fields functionally. Now any Custom Field that is created by the Company Administrator, can be designated as a Required Field for designated Stages. You will see a tag CUSTOM in the field pull-down beside your Custom Fields when adding them as a Required Field.

Field	Stages
Acquisition Status	2 Capture, 3 Pre-Pr
Incumbents	2 Capture, 3 Pre-Pr
NAICS	2 Capture, 3 Pre-Pr
Opportunity Manager CUSTOM	2 Capture, 3 Pre-Pr
P-Award	2 Capture, 3 Pre-Pr
Priority	2 Capture, 3 Pre-Pr

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Help!

- ◆ Does your team need training on implement new features?
Email [Donna Hamby](#)
- ◆ Did you run into a problem working in OneTeam?

Support

- ◆ First try the **Support** button, search for your issue and see if there is a tutorial or answer to your issue.



Next try the **Support Chat** button. If chat does not find a solution, OneTeam will open a ticket and notify our service team.

- ◆ Are you a GovCon and need a demo to see if OneTeam is right for your company?

[Request a Demo](#)

Q & A

Real questions from real clients with only minor edits for clarification.

Q: Why can't I see some of the opportunities that have been assigned to me?

A: First let's check a few things.

- 1) Do you have appropriate permissions to view the opportunity pipeline? You need to be an Opportunity Manager to view the list of opportunities.
- 2) Are there filters on that are limiting the opportunities that you should be seeing? Maybe there is a filter on STAGE, and the opportunities you expect to see do not have a stage assigned to them. You can have filters applied to columns that are not included in your Opportunity View. Check the Columns button, and look for the Funnel Icon—it might be on a column that is not included in your view. Remove this filter and save the view.
- 3) GovWin might be in the middle of an update, and you may need to wait 5 minutes and refresh your page.

We had all three of the instances happen within the last few weeks.

New Feature

Division Revenue Breakdown — Private Preview Mode — Full Version Q3 '22

If you are a OneTeam user who has designated company Divisions, to track opportunities and revenue at the division level, we have a new feature in Private Preview right now. Private Preview means that we are evaluating and fine-tuning the feature before release to all OneTeam user companies. If you use the Divisions feature to sub-divide opportunities and want to try the Division Revenue Breakdown function, let us know and we can let you evaluate it and provide feedback to improve functionality.

This new feature allows for Revenue to be broken down at the Division level, for clients that need more detailed revenue projections.

Division	Total	2022	2023	2024	2025	2026	2027
Cyber Security	62% / \$4,03...	8% / \$335,6...	20% / \$806,...	20% / \$806,...	20% / \$806,...	20% / \$806,...	12% / \$470,...
Cost Element	Total	2022	2023	2024	2025	2026	2027
Contractor Site Labor	30% / \$1,20...	\$100,710	\$241,800	\$241,800	\$241,800	\$241,800	\$141,090
Government Site Labor	20% / \$806...	\$67,140	\$161,200	\$161,200	\$161,200	\$161,200	\$94,060
Subcontractor	40% / \$1,61...	\$134,280	\$322,400	\$322,400	\$322,400	\$322,400	\$188,120
Travel	10% / \$403,...	\$33,570	\$80,600	\$80,600	\$80,600	\$80,600	\$47,030
Engineering Services	38% / \$2,47...	8% / \$205,751	20% / \$494,...	20% / \$494,...	20% / \$494,...	20% / \$494,...	12% / \$288,...

New Features/Updates in 2022

OneTeam has a lot of exciting plan for the second half of 2022! Our developers are working on updating existing features and creating new features.

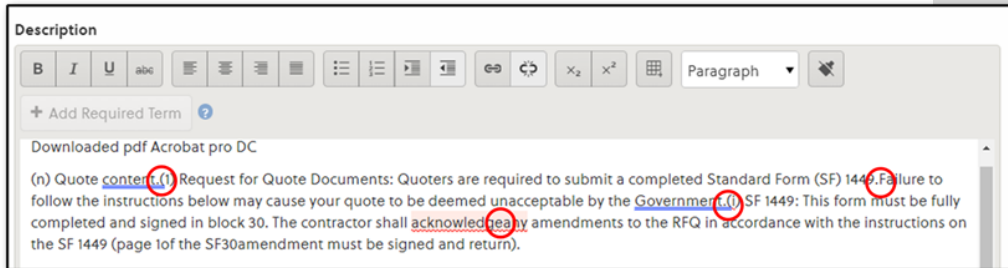
- ◆ Automated Gate Review Templates—in Private Preview
- ◆ Analytics Module with Power BI embedded in OneTeam—in Private Preview
- ◆ More Autofill values for Communications Templates
- ◆ Ability for multiple Qualification Matrices—Subcontractor, IDIQ Task Order, or Custom matrix
- ◆ Online Training with videos and tutorials!

Send all questions to [Donna Hamby](#) and we will email you an answer—and maybe include it here for other users!

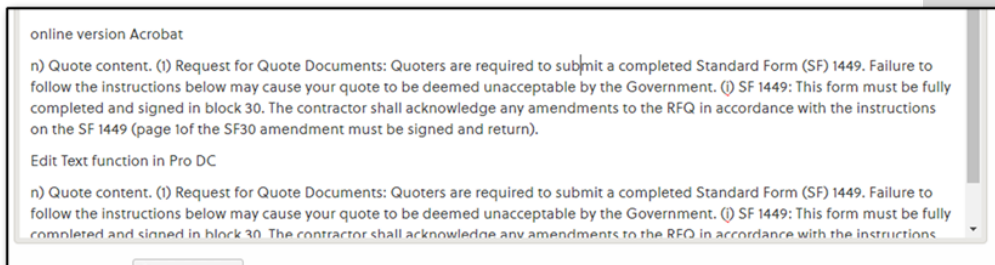
ProTip: Pasting from a PDF Documents

Have you noticed that when copying and pasting from a pdf into the Description Tab or Compliance Matrix in OneTeam, that some of your words run together?

This is because of embedded pdf code is removed when pdf data is pasted into OneTeam. If you copy and paste from Adobe Acrobat Pro document from your files, that code at the end of each text line is removed, and shoves words together. But recently, we discovered something new – by accident!



If you open the pdf online, then copy and paste from it there – no more words running together! Alternatively, you can open a pdf in Pro go to the Edit menu, then select and copy/paste entire paragraphs and retain the spacing. This is definitely a time-saver!



Upcoming OneTeam Events

APMP Bid & Proposal Con 2022 Dallas, TX

OneTeam is a Gold Sponsor and will present “Say Goodbye Annotated Outlines and Hello OneTeam!”

Space & Missile Defense Symposium Aug 9-11, 2022

Visit our booth at the SMD show to learn more about OneTeam!

OneTeam Online Webinars

Pipeline



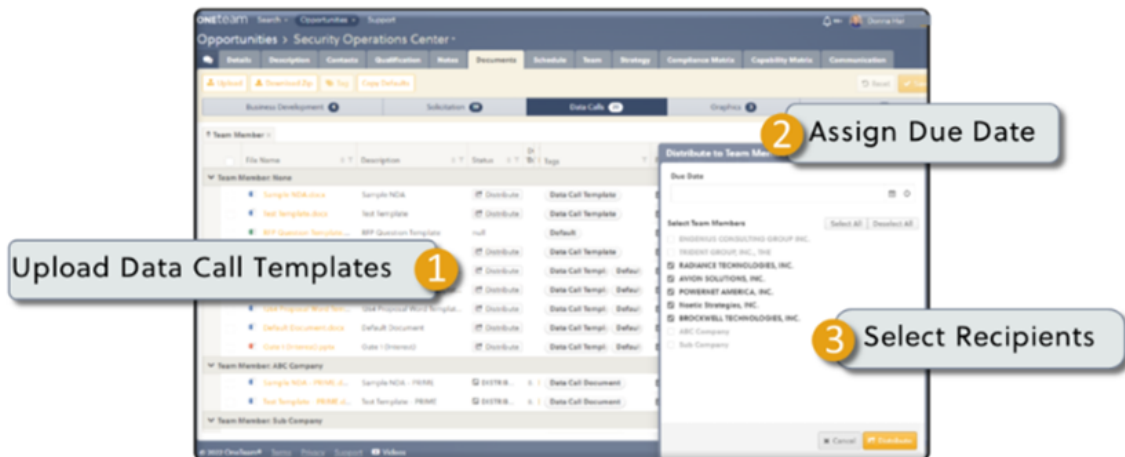
Capture



Proposal



Proposal Managers, send and receive Data Calls with Automated Workflows and Real-Time Status Board



ONEteam

Data Call Dashboard provides Real-Time status of NDA's, Teaming Agreements, and other Data Calls



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