Lasso Cheat Sheet

How to Receive RFIs and Submit Properties

How to receive RFIs and Submit Properties:

Step by Step:

1. Receive an email from Lasso App <u>lassoedapp.com</u> – the email will invite you to Participate in submitting an RFI.



New Lasso Message You have a new message from a contact in Lasso

You have received an invitation to participate in project Project Lasso Demo via Lasso, an online project management system designed to assist with managing property submissions and associated RFI data. If you are reviewing this message in your email, please click the link below to login to our system. Once you are logged into Lasso, please click the Projects menu item above to review, accept or reject this project.

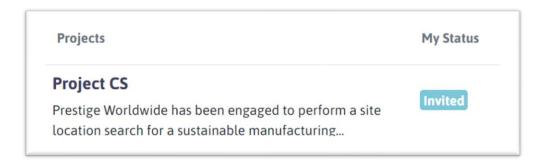
2. Click the Link and Login

- 3. Login as an existing LOIS Customer or as a New User are you an existing LOIS customer or a new user?
 - If a LOIS Customer If your organization subscribes to LOIS, then login with the same email address and password that you utilize for LOIS because Lasso is built on top of LOIS.
 - Not a LOIS Customer click "New User Registration" to fill in the required fields and Create
 an Account.
- 4. User Profile Click the User Profile icon in the top right-hand corner of the screen and click Profile.
- **5. My Communities** Scroll down to the My Communities section to select the communities that you represent.
 - If a Region, it is possible to select more than one community.
 - If a State, it is possible to select All Communities.

• If a LOIS Customer – If your organization subscribes to LOIS, your communities in LOIS will sync with Lasso. If you wish to update the communities you represent, this will need to be done in your LOIS account. For assistance, please email locationonehelpdesk@gmail.com.

It is only after you select the Communities that you represent that you will be able to interact with the RFI, either by responding to the questions or by delegation.

6. Projects – Click the projects tab to view the projects you have been invited to and the status of each project.



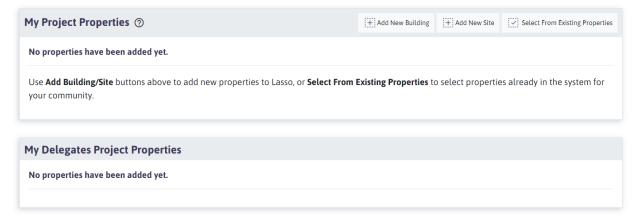
- Click the project to view the project details to review the project description, attachments, the start date, and deadline.
- **7. Participate or Decline** if your organization would like to participate in the project, click the thumbs up icon next to Participate. After choosing to participate, then you can either respond or delegate.



8. Add Properties

- Add Properties yourself for the communities that you represent and / or
- Add Delegates to invite others to add properties





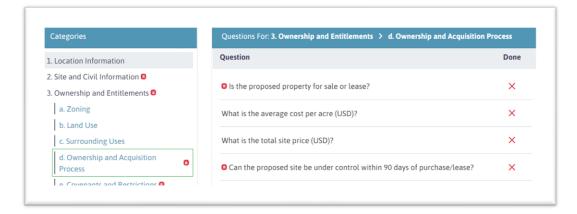
For Delegates:
Those Adding Properties and Responding to the RFI Questions

9. Requirements – Only properties that meet the requirements will be allowed for the submission. An override with an explanation of how the requirement can be met is available for those properties that have an exception.

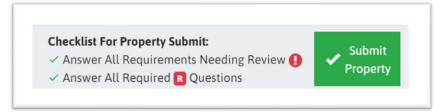


10. Required Questions – the red icon next to a question indicates that it is required. The RFI will not be eligible for submission until all red icons have been satisfied.

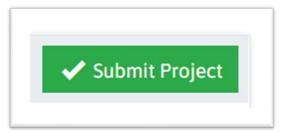




- **11. Percent Completion** it is encouraged to answer all RFI Questions and receive a 100% completion rate. However, it may not be possible to achieve 100% because a question may not be applicable to that specific property. Reply with as many answers as possible.
- **12. Submit Property** when ready to submit the property, refer to the submission checklist to ensure have satisfied the asks. Then, click Submit Property.

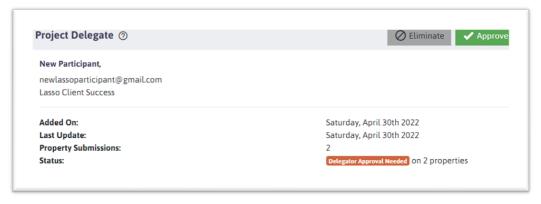


13. Submit Project – when ready to submit all properties for the project, click on Details to see the Project Details screen. Click Submit Project.

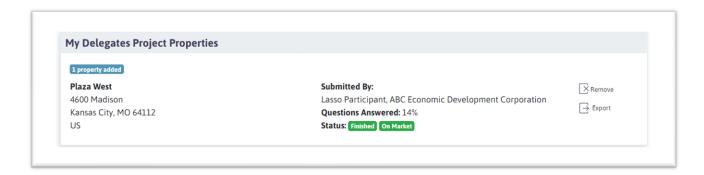


For Delegators: Those Reviewing each Property for Quality Control and Submitting all Properties for the Project

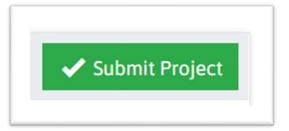
14. Approve Delegates Properties – Click on Delegates to review and approve of your delegates properties.



15. Review Delegates Properties – Click on Properties to see the properties you have submitted yourself and the properties submitted by your delegates. Review the answers for quality control prior to submitting the project.



16. Submit Project – when ready to submit all properties for the project, click on Details to see the Project Details screen. Click Submit Project.



Complete!

Collect. Collaborate. Compete.

Stay tuned for another invitation from Lasso!