

Capture2Proposal has some exciting new updates and user roles available when you log into our application!

First, let's talk about roles and permissions. We know you want to give people exactly the tools they need to do their job properly, and we want to make that easy for you! As a result, we have created or updated the following roles:

- **Executive Oversight:** This new licensed role is designed for any team member who needs to see the full picture of your Business Development team efforts. This read-only role gives the user the ability to access the Company Pipeline, Dashboards, Global Contacts, Tasking, and Analytics. They also have read-only access to all opportunities in your Pipeline to get a more detailed view of your current projects. The role does not have access to Opportunity Search or Create Unique Opportunity.
 - **Supervisor:** This new opportunity-based role is on par with the Proposal Manager role. This designation can be assigned to multiple users within the opportunity and has the same level of access as the Proposal Manager role to all opportunity features.
 - **Proposal Coordinator and Proposal Production Support:** By popular request, these existing opportunity-based roles have both been granted full manage access to the Custom Capture tab.
 - **Proposal Production Restricted:** This new role mirrors the previous Proposal Production Support role permissions. The user has access to the opportunity but cannot access Custom Capture.
-

Customized Capture Status

Admin Console

MANAGE USERS

CUSTOM CAPTURE

INTEGRATION

REPORT GENERATION

CAPTURE STATUS

Add or remove Capture Status options from the drop-down field options. Identify whether each of your custom fields should be considered an active or inactive fields. This determination will be used in calculations for dashboard statistics and sorting options. All hidden statuses must map to an active status. Drag and drop fields to update order in the drop-down selections.

Source	Status Type	Status	Visible		Delete
Unique	Placeholder	Long-Term Forecast Placeholder	Visible		
C2P	Working Opportunity	Identification	Visible		
Unique	Working Opportunity	RFI Complete/Waiting for RFP	Visible		
C2P	Working Opportunity	Opportunity Validation	Visible		
Unique	Working Opportunity	Teammate Needed to Proceed	Visible		
C2P	Working Opportunity	Proposal Development	Visible		
Unique	Working Opportunity	Final Proposal Review	Visible		
C2P	Working Opportunity	Proposal Submitted / Awaiting Notification	Visible		
C2P	Inactive/Award Pending	Opportunity Dropped	Visible		
C2P	Won	Awarded - Won	Visible		
Unique	Won	Awarded - Won as JV	Visible		
Unique	Won	Awarded - Won as Prime	Visible		
Unique	Won	Awarded - Won as Sub	Visible		
C2P	Lost	Awarded - Lost	Visible		
Unique	Lost	Awarded - Lost - We're Protesting	Visible		
C2P	Working Opportunity	Not Applicable	Visible		
Unique	Inactive/Award Pending	RFI did not result in RFP	Hidden	Opportunity Dropped	
C2P	Working Opportunity	Post Bid Decision	Hidden	Not Applicable	
C2P	Working Opportunity	Post Pursuit Decision	Hidden	Not Applicable	
C2P	Inactive/Award Pending	No Pursuit	Hidden	Opportunity Dropped	
C2P	Inactive/Award Pending	No Bid	Hidden	Opportunity Dropped	

Add Custom Status

CancelSave

Click to see larger image

Next, we have added the ability to customize the Capture Status options for your company! For those of you that define Capture Status differently than C2P, you can now add and remove statuses via the Admin Console. No more need for a Custom Capture field to manage your company's preferred status options!

- Add or remove any status options quickly and easily. Drag and drop entries in the status grid to change the order of the options as they should appear in the drop-down menu.
- Identify which statuses indicate active, working proposals and which indicate dropped or completed proposals when you create the status so that our Pipeline Stats At A Glance can be calculated properly based on your status options.
- Update your options worry-free. Any time you remove an existing option, you will map it to a new field ensuring that the statuses shown in your opportunities and pipeline always conform to the available options in your drop-down.

Exporting Opportunity Data for Unanet Integration

To enable integration with Unanet, we are providing the ability for customers to export opportunity data from Capture2Proposal to the customer's Unanet Hosted IMU platform, or their own file server.

This opportunity data can be imported into Unanet, and you may implement this yourself or engage with the Unanet Professional Services team.

More information on each of these updates can also be found in the Help Guide, and our [Customer Success Team](#) is standing by as always to help you with any questions you may have about these updates.

Keep checking back for more updates as our team continues work to improve our existing features as well as to add new capabilities in each of our planned releases.

What's Next for Capture2Proposal

Major items identified for the Capture2Proposal RoadMap in the first part of 2021 include:

- Improved Analytics
- Opportunity Tasking improvements
- Enhanced Teaming
- Microsoft Teams Integration

Happy Hunting!