Oracle® Proposals

User Guide

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Oracle Proposals User Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Proposals User Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Proposals

  If you have never used Oracle Proposals, Oracle suggests you attend one or more of the Oracle Proposals training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Proposals.

- Chapter 1: Introduction to Oracle Proposals, discusses the key features and process flows of Oracle Proposals.
- Chapter 2: Overview of Using Oracle Proposals, provides an overview of the user interface, and the administration tasks needed for using Oracle Proposals.

- Chapter 3: Administering Oracle Proposals contains instructions for creating template categories, templates, components, dynamic fields, and also contains other administrative information.
- Chapter 4: Creating Proposals, provides instructions for creating proposals.
- Chapter 5: Determining Proposal Content, provides instructions for determining proposal content.
- Chapter 6: Generating Proposals, provides instructions and information needed for generating, uploading, and downloading proposal documents.
- Chapter 7: Emailing Proposals, provides instructions for emailing proposals.
- Chapter 8: Accessing Proposals, provides instructions for accessing proposals.
- Appendix A: Oracle Proposals User Interface Reference
- Appendix B: Seed Data
- Appendix C: Security in Oracle Proposals
- Appendix D: Dynamic Field Structure in RTF Files

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Proposals.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Proposals shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Proposals.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Proposals (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Proposals Implementation Guide

This guide describes and explains the procedures needed for successful implementation of Oracle Proposals.

Oracle Quoting Implementation Guide

This guide describes and explains the procedures needed for successful implementation of Oracle Quoting.

Oracle Quoting User Guide

This guide describes and explains the concepts and procedures that are helpful in using the application.

Oracle Sales Online Implementation Guide

This guide contains the information needed to understand, implement, and use Oracle Sales Online. It brings together all the information needed for successful implementation of three Oracle Sales products: Oracle Field Sales, Oracle Sales Online, and Oracle TeleSales.

Oracle Sales Online User Guide

This guide describes and explains the concepts and procedures that are helpful in using the application.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using

Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Proposals. This manual details additional steps and setup considerations for implementing Oracle Proposals with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Proposals with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Proposals.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Proposals implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Proposals and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization’s structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Proposals working for you. This team includes your Technical Representative, Account Manager, and Oracle’s large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracl*eMetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracl*eMetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracl*eMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus®, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Send Us Your Comments

Oracle Proposals User Guide, Release 11*i*

Part No. B10290-01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us via postal service:

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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Part I

Introduction and Overview

This part contains the following chapters:

- Chapter 1, "Introduction to Oracle Proposals"
- Chapter 2, "Overview of Using Oracle Proposals"

1

Introduction to Oracle Proposals

This chapter discusses the key features and procedures of Oracle Proposals. Sections in this chapter include:

- Section 1.1, "Overview"
- Section 1.2, "Oracle E-Business Suite 11.5.9 Release"
- Section 1.3, "Oracle Proposals Key Features"
- Section 1.4, "Oracle Proposals Integrations"
- Section 1.5, "Creating Proposals Overview"

1.1 Overview

Oracle Proposals allows you to generate dynamic proposals using templates.

With Oracle Proposals, you can:

- Shorten the sales cycle by reducing from days to hours the time needed to generate a proposal
- Project a consistent and high quality professional image
- Free yourself to work with customers by automating the proposal process

Oracle Proposals streamlines proposal creation by automating time- and resource-consuming tasks. You can generate proposals from templates that package recurring proposal elements such as cover letters, executive summaries, and product descriptions.

Central template administration guarantees standard and professional corporate proposals.

1.2 Oracle E-Business Suite 11.5.9 Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.9 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

1.3 Oracle Proposals Key Features

Oracle Proposals includes the following features:

- Proposal Creation
- Guided Proposal Content Building
- Proposal Document Generation
- E-Mail Delivery
- Proposal Views and Searches
- Proposal Templates
- Dynamic Fields
- Proposal Components for Standardized Content

Proposal Creation

You can create either standalone proposals, or proposals based on quotes in Oracle Quoting. When creating a proposal, you select a master proposal template from a list of possible templates and specify the proposal name, description, and due date. For standalone proposals, you also select a customer. For a quote-based proposal, you launch proposal creation from the quote overview, and quote information, such as the customer name, is automatically pulled into the proposal.

Guided Proposal Content Building

Oracle Proposals enables you to track your progress while building a proposal, so you can see at a glance whether proposal components are complete. You can determine the order of proposal components, and include or exclude optional elements. Dynamic fields in the components capture required information from sources specified by you.

Proposal Document Generation

Once you have built the proposal content, you can generate a proposal document in RTF format. This document is the physical file that is shared with the customer. You can regenerate documents as often as needed. The generated documents are versioned automatically and stored in the database. You can view, download, edit, and re-upload the documents as needed.

E-Mail Delivery

Using Oracle Proposals, you can e-mail proposals to customers. You can select the appropriate proposal documents and customer contacts, then e-mail them to the contacts and other required recipients.

Proposal Views and Searches

The Oracle Proposals homepage displays recently updated proposals and proposals due to customers soon. You can perform proposal searches on criteria such as customer data, and creation or due date, etc.

Proposal Templates

Oracle Proposals uses proposal templates, which are predefined, standard boilerplate documents from which proposals are generated. Templates outline a proposal's structure. A template is made up of components such as cover letters, product descriptions, and collateral.

Administrators create templates, define template categories, and determine template components, component order, and component status. The template name and category helps you select the most appropriate template for each proposal.

Dynamic Fields

Administrators can include dynamic fields in the component documents to reference information from objects previously captured in the sales cycle, for instance, quotes.

Values for dynamic fields can come from the user, database objects, or custom Java programs, retrieving data from various objects and object sources.

Dynamic fields for values from Oracle E-Business Suite Quote and Proposal objects are seeded with the application. Administrators can create user-defined and custom dynamic fields.

Proposal Components for Standardized Content

Proposal components are pieces of standard content that are included in templates, such as cover letters and executive summaries. Administrators can define components and create multiple documents for each component, since the style and content required may vary from one template to another. For example, the component *Cover Letter* can include the documents *Simple Cover Letter* and *Professional Cover Letter*.

The documents are RTF (Rich Text Format) files that store content such as standard text, graphs, tables, dynamic fields, etc.

1.4 Oracle Proposals Integrations

Listed below is basic information on Oracle Proposals integrations. Please see the *Oracle Proposals Implementation Guide f*or more details.

1.4.1 Oracle Customer Relationship Management (CRM) Foundation

For information on CRM Foundation usage, please see the *Other Sources of Information* section in the Preface of this guide.

- **Oracle Quoting**: For adding quotes to proposal or creating a proposal from a quote and for quote dynamic fields substitution
- **Resource Manager**: Resource Manager is a central repository for all resources that is used to import and view resources, define resources and roles, create teams and groups, and organize resources within those teams and groups.
- **Interaction History**: Interaction History is a collection of tables and business logic that records touch points between customers and resources for Oracle Applications. Interaction History is part of the Oracle CRM Foundation product suite. After CRM Foundation is installed, clients can access the Interaction History graphical interface. Interaction History records can be browsed and retrieved, integrating its graphical interface into an application or by using its views. See the *Oracle CRM Application Foundation Implementation Guide, Release 11i* for details.

1.4.2 Third Party Integrations

- Oracle Proposals generates proposal documents in RTF (Rich Text Format) format viewable in third party word processors. Integration with word processing/editing programs with RTF creation capability is necessary to:

  - Store standard component content, including dynamic fields and formatting style.
  - Generating proposal documents.
- A zipping application may also be needed to unzip proposal documents from a zipped source.

1.5 Creating Proposals Overview

The following table shows the proposal creation process.

Step/ Sequence	Task
1	Select Template
2	Initiate proposal creation.
3	Provide the following: ▪ Customer Name - Search for customer. Customer name defaults from quote if proposal is created from quote. ▪ Due Date ▪ Contact (if the customer is an organization)
4	Validate proposal details: ▪ Name is not Null ▪ Due date is not Null and is defined for a future date. ▪ Customer name is not Null
5	Create proposal
6	Verify proposal is created successfully. Display confirmation message.
7	Verify/modify proposal components, their content and order, if needed.

2 Overview of Using Oracle Proposals

This chapter provides an overview of the major tasks you can perform using Oracle Proposals. Sections in this chapter include:

- Section 2.1, "Accessing the Oracle Proposals Dashboard User Interface"
- Section 2.2, "Accessing the Oracle Proposals Administrator User Interface"
- Section 2.3, "Summary of Oracle Proposals Tasks"
  - Section 2.3.1, "Getting Help"

2.1 Accessing the Oracle Proposals Dashboard User Interface

The Dashboard page is the gateway for viewing, creating, and updating existing proposals. This is the homepage for users whose responsibility has been given the *Proposal Homepage* menu. These types of users do not have access to the Administration sub-tab of the application unless they have also been given the *Proposal Main* menu (see Section 2.2 below). Please see the *Oracle Proposals Implementation Guide, Appendix D: User Data* for more details.

After logging in, these users see the Dashboard page display with the following values:

- Recent Proposals
  - Name
  - Description
  - Customer
  - Due Date
  - Status

- Due within *X* days
  - Name
  - Description
  - Customer
  - Due Date
  - Status

Prerequisites

You must be logged in as a valid Oracle Proposals user. This is assumed for all procedures in the chapters following this one.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   http://<host> :<apache port>/OA_HTML/jtflogin.jsp

   > **Note:** Your system administrator can give you the values that should replace <host> and <apache port> in this URL.

2. Enter your user name and password.
3. Select **Go**. The **Dashboard** page appears.

2.2 Accessing the Oracle Proposals Administrator User Interface

The Administration page is the homepage for users whose responsibility has been given the *Proposal Main* menu. Users with this menu also have access to the Dashboard page where they can view, create, and modify proposals. Administrators do not have access to proposals created by other users.

After logging in, these users see the Administration page. The left-hand sidebar is the primary navigation point to the administrative functionality, and displays the following values:

- Templates - links to Templates page.
- Components - links to Components page.

- Dynamic Fields - Read Only
  - User Defined - links to Dynamic Fields: User Defined page
  - Quote - links to Dynamic Fields:Quote page
  - Proposal - links to Dynamic Fields: Proposal page
- Other Setup - Read Only
- Template Category - links to Template Category page.

Please see the *Oracle Proposals Implementation Guide, Appendix D: User Data* for more details.

Instructions for all administrative tasks can be found in Chapter 3, "Administering Oracle Proposals".

> **Note:** Proposals **cannot** be created until all administrative tasks have been performed.

Prerequisites

You must be logged in as a valid Oracle Proposals user **and** have the *Proposals Main* menu assigned to your responsibility.

Steps

1. Navigate to the Oracle CRM Applications login page at:

   http://<host> :<apache port>/OA_HTML/jtflogin.jsp

   > **Note:** Your system administrator can give you the values that should replace <host> and <apache port> in this URL.

2. Enter your user name and password.
3. Select **Go**. The **Administration** page appears.

2.3 Summary of Oracle Proposals Tasks

Use Oracle Proposals to perform the following tasks:

- Chapter 4, "Creating Proposals"
- Chapter 5, "Determining Proposal Content"
- Chapter 6, "Generating Proposals"
- Chapter 7, "E-mailing Proposals"
- Chapter 8, "Accessing Proposals"

2.3.1 Getting Help

Oracle Proposals provides you with a complete online help facility. Whenever you need assistance, simply select the **Help** icon from whichever page you are on to pinpoint the information you need.

For help with the Profile page, please see the *Oracle Application's User's Guide, Release 11i* for further assistance and information.

Part II

User Procedures

This part contains the following chapters:

- Chapter 3, "Administering Oracle Proposals"
- Chapter 4, "Creating Proposals"
- Chapter 5, "Determining Proposal Content"
- Chapter 6, "Generating Proposals"
- Chapter 7, "E-mailing Proposals"
- Chapter 8, "Accessing Proposals"

3 Administering Oracle Proposals

Proposal administration tasks must be performed before users can create proposals. Administrators must set up:

- Template categories
- Templates
- Components
- Dynamic fields

Only those users whose responsibility has been assigned the **Proposal Main** menu are able to perform the tasks outlined in this chapter.

This chapter is organized into the following sections:

- Administration Tasks Overview
- Administering Template Categories
- Administering Dynamic Fields
- Administering Proposal Components
- Administering Proposal Templates
- RTF Files Overview
- Other Administrative Tasks

3.1 Administration Tasks Overview

The administration of Oracle Proposals contains the following sections:

- Section 3.2, "Administering Template Categories"

- Section 3.3, "Administering Dynamic Fields"
- Section 3.4, "Administering Proposal Components"
- Section 3.5, "Administering Proposal Templates"

3.2 Administering Template Categories

Template categories define groups of templates by purpose or usage, making it easier for users to select the appropriate template while creating a proposal.

This section contains the following tasks:

- Creating Template Categories
- Viewing Template Categories
- Deleting Template Categories
- Modifying Template Category Details

3.2.1 Creating Template Categories

Template categories must be created before templates can be set up.

To create template categories:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Other Setup > Template Category**. The Template Category page appears.
2. Select **Create Template Category**. The Create Template Category page appears.
3. Enter a unique alphanumeric code for the category in the **Code** field. This code is not translatable and cannot exceed 10 unicode characters.

4. Enter a name for the category in the **Name** field.
5. Optionally, enter a description in the **Description** field.
6. Select **Apply** to finalize the template category creation process. If the category code is unique, the Template Category page appears. It displays the new category code and name, as well as a confirmation message, verifying that the template category was created successfully.

   If the category creation fails, an error message displays. If this occurs, fix the error and select **Apply** again.

3.2.2 Viewing Template Categories

To view template categories:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu

Steps

1. Navigate to **Administration > Other Setup > Template Category**. The Template Category page appears.
2. All available template categories are displayed in table format with the following elements:
   - **Code**: Hyperlinked to the Template Category detail page
   - **Name**: Category name
   - **Description**: Category description
   - **Last Updated By**: FND user name of the user who last updated the template category
   - **In Use**: Displays a check icon if in use, otherwise blank. A template category is in use if it has at least one template assigned to it.

- **Delete**: Category can be deleted only if it is **not** In Use. Delete icon will be enabled if not in use, otherwise disabled.

3. Select the hyperlink in the **Code** column to view a template category's details.
4. Select **Next** to view any additional template categories.
5. To reorder the display based on ascending or descending display values, click on the titles in the respective columns.

3.2.3 Deleting Template Categories

Template Categories can only be deleted if they are **not** in use.

To delete template categories:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu

Steps

1. Navigate to **Administration > Other Setup > Template Category**. The Template Category page appears.
2. Template categories can be deleted in either of the following ways:
   - On the Template Category page, select the delete icon in the **Delete** column for the corresponding category. This icon is enabled only if this category is **not** in use.
   - Select the hyperlink in the **Code** column for the category to be deleted. The relevant **Template Category** page appears. Select **Delete**. This button is enabled only if the category is **not** in use.
3. A warning page displays, asking you to confirm the deletion.
4. Select **Yes** to confirm and continue with the deletion. The Template Category page appears displaying a message confirming the deletion. Note that the row for this template category will be deleted in the table display.

3.2.4 Modifying Template Category Details

To modify template categories:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu

Steps

1. Navigate to **Administration > Other Setup > Template Category**. The **Template Category** page appears
2. Select the hyperlink in the **Code** column for the template category you want to view and/or edit. The relevant **Template Category** page appears, displaying the category **Code**, **Name**, and **Description**.

   Only the **Name** and **Description** fields are editable:
3. Make your changes, then select **Apply** to save or **Cancel** to start over. The Template Category page appears.
4. Verify that your modifications are correct in the table display.

3.3 Administering Dynamic Fields

Dynamic fields provide users with the ability to insert, under variable forms, different items used in proposals. Dynamic fields are placeholders for content. They reference content that gets added to proposals during proposal creation. Dynamic fields are used to substitute information into a standard boilerplate RTF file.

There are two types of dynamic fields that are understood by the proposal generator:

- **Seeded Dynamic fields**

  These dynamic fields are seeded into the application and reference specific objects. Sales administrators can use these dynamic fields in their component content, but cannot create their own. Dynamic fields that are related to the

Quote and Proposal object within Oracle's eBusiness Suite are exposed as dynamic fields. For a list of seeded dynamic fields, please see Appendix B, "Seed Data".

- **User-defined Dynamic Fields**

  These dynamic fields are defined by administrators. Values for these fields are obtained:

  - Through the user interface. Users provide values for these fields during the proposal generation process.
  - By calling a Java program. A Java program registered by administrators is called during the proposal generation process to provide the appropriate values. These user-defined dynamic fields can be used to pull in information from any object that resides within or outside the Oracle E-Business Suite. This is a way to integrate any Oracle or non-Oracle objects into Oracle Proposals.

> **Note:** All seeded dynamic field codes are prefixed with *PRP*. You **cannot** create user-defined dynamic fields with codes that are prefixed with *PRP*.

After defining the dynamic fields, the next task is to create the components in which those dynamic fields will be used. See Section 3.4, "Administering Proposal Components" for instructions.

This section contains the following tasks:

- Viewing Quote Dynamic Fields
- Viewing Proposal Dynamic Fields
- Administering User Defined Dynamic Fields

3.3.1 Viewing Quote Dynamic Fields

Oracle Proposals exposes quote attributes as seeded dynamic fields. Administrators can insert these fields in the RTF files.

To view quote dynamic fields:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu

Steps

1. Navigate to **Administration > Dynamic Fields > Quote**. The Dynamic Fields: Quote page appears, displaying the following values for each quote dynamic field:
   - **Group**: Group name. Used to group similar quote dynamic fields under a meaningful name.
   - **Code**: Dynamic field code
   - **Name**: Name of the quote dynamic field.
   - **Description**: Description of the quote dynamic field.
   - **RTF Display**: Name as it appears within the RTF file representing the component content. This column is used as a reference for users to indicate how they should represent quote dynamic fields within a document (if created outside the system).
2. Select **Next** to navigate to the next page of Quote dynamic fields, if any.
3. To reorder the display based on ascending or descending display values, click on the titles in the respective columns.

3.3.2 Viewing Proposal Dynamic Fields

Proposal dynamic fields are seeded in the application. For a full list of seeded Proposal dynamic fields, please see Appendix B, "Seed Data".

To view Proposal dynamic fields:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu

Steps

1. Navigate to **Administration > Dynamic Fields > Proposals**. The Dynamic Fields: Proposals page appears, displaying the following values for each proposal dynamic field:
   - **Group**: Group name of the proposal dynamic field. Used to group similar proposal dynamic fields under a meaningful name.
   - **Code**: Dynamic field code
   - **Name**: Name of the proposal dynamic field
   - **Description**: Description of the proposal dynamic field
   - **RTF Display**: Name as it appears within the RTF file that represents the component content. This column is used as a reference for sales administrators to know how they need to represent proposal dynamic fields within a document.
2. Select **Next** to navigate to the next page of Proposal dynamic fields, if any.
3. To reorder the display based on ascending or descending display values, click on the titles in the respective columns.

3.3.3 Administering User Defined Dynamic Fields

Before creating content for templates, administrators must create all required user defined dynamic fields. When creating a user defined dynamic field, administrators can register them as:

- **Text dynamic fields**. The Oracle Proposals Administrator creates a dynamic field, and the value is provided through the proposal creation user interface by the end user.
- **Drop Down dynamic fields**. The Oracle Proposals Administrator defines the drop down box that will be displayed in the proposal creation UI. Users can only pick from the Drop Down values defined by the administrator. The dynamic field value cannot be deleted if it is in use in a proposal.

- **Java Program dynamic fields.** The Oracle Proposals Administrator registers a custom program that is called to provide the dynamic field values during the proposal generation process.

This section contains the following tasks:

- Creating User Defined Dynamic Fields
- Creating Text Dynamic Fields
- Creating Drop Down Dynamic Fields
- Creating Java Program Dynamic Fields
- Inserting Dynamic Field Code and Field Name in RTF File
- Editing Dynamic Fields
- Deleting Dynamic Fields
- Viewing User-Defined Dynamic Fields

Please review the information in Appendix D, "Dynamic Field Structure in RTF Files" for details, scenarios, and guidelines for creating dynamic fields. If you experience any problems with your dynamic fields, or need information to guide you during the creation of dynamic fields in RTF files, use this appendix as a reference.

3.3.3.1 Creating User Defined Dynamic Fields

To create user defined dynamic fields:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu

Steps

1. Navigate to **Administration > Dynamic Fields > User Defined**. The **Dynamic Fields: User Defined** page appears.

2. Select **Create Dynamic Field**. The **Create Dynamic Field: General Details** page appears.
3. Enter a unique alphanumeric code for the dynamic field in the **Dynamic Field Code** text field. This code is not translatable and cannot exceed 10 unicode characters.
4. Enter a name for the dynamic field in the **Name** field.
5. Optionally, enter a description in the **Description** field.
6. Select a type from the **Field Type** drop-down box. Values are *Text*, *Drop Down* and *Java Program*.
7. After making your selection, Select **Next** to proceed, or **Cancel** to void the entries and return to the **Dynamic Fields: User Defined** page.
8. Proceed to:
   - Section 3.3.3.2, "Creating Text Dynamic Fields" if your selection is **Text**
   - Section 3.3.3.3, "Creating Drop Down Dynamic Fields"if your selection is **Drop Down**
   - Section 3.3.3.4, "Creating Java Program Dynamic Fields" if your selection is **Java Program**

3.3.3.2 Creating Text Dynamic Fields

To create text dynamic fields:

Steps

1. The value you entered for **Name** populates the **Field Prompt** field. Enter a different value if you wish, or keep the original. This will be used as a user prompt for this dynamic field.
2. Select a type from the **Data Type** drop-down box. This field is used for validating the dynamic field once values are filled out. Values are *Character*, *Date*, and *Number*:
   - **Character** requires an alphanumeric value.
   - **Date** requires a date value.
   - **Number** requires a numeric value.
3. If your choice is **Character**, enter a maximum length value between one and two thousand in the **Maximum Length** field (Maximum Length is irrelevant for

Date and Number). This value determines how many characters can be entered in the textfield. Any decimal values entered will be rounded.

4. Select **Next** to proceed, **Cancel** to exit the create flow, or the **Back** button to return to the previous step. Creating this dynamic field automatically makes it available for creating component documents.
5. After selecting **Next**, the **Create Dynamic Field: Review** page appears. Review the information you have provided.

> **Note:** You will **not** be able to modify a dynamic field's code after the field is created

6. If everything is correct, select **Finish**. The **Dynamic Fields: User Defined** page appears displaying a confirmation message, and the new dynamic field is listed.

3.3.3.3 Creating Drop Down Dynamic Fields

To create Drop Down dynamic fields:

Steps

1. The value you entered for **Name** populates the **Field Prompt** field. Enter a different value if you wish, or keep the original. This will be used as a user prompt for this dynamic field.
2. Enter a drop down display value in the **Drop Down Display Value** field. To enter multiple values, select **Add Row** for more rows. To delete any of the values entered, select the delete icon in the **Delete** column. You should have at least one valued specified
3. Select **Next**. The **Create Dynamic Field: Review** page appears. Review the information you have provided. Creating this dynamic field automatically makes it available for creating component documents.

> **Note:** You will **not** be able to modify a dynamic field's code after the field is created

4. To make any changes, select the **Back** button.

5. If everything is correct, select **Finish**. The **Dynamic Fields: User Defined** page appears displaying a confirmation message, and the new dynamic field is listed.

3.3.3.4 Creating Java Program Dynamic Fields

To create Java program dynamic fields:

Steps

1. Enter the class and method name of the Java program to be executed in the **Program Name** field. Example: Class.Method. The program name is not translatable. The Java file should already exist and be in CLASSPATH.
2. Select **Next**. The **Create Dynamic Field: Review** page appears. Review the information you have provided. Creating this dynamic field automatically makes it available for creating component documents.

> **Note:** You will **not** be able to modify a dynamic field's code after the field is created

3. To make changes, select the Back button.
4. If everything is correct, select **Submit**. The **Dynamic Fields: User Defined** page appears with a confirmation message with the new dynamic field displayed.

3.3.3.5 Inserting Dynamic Field Code and Field Name in RTF File

Once a field has been created, the code and field name must be inserted into the corresponding RTF file for the component. This can be done after the RTF file has been created, or it can be a part of the RTF file creation process.

To insert the dynamic field code and name:

1. Open the RTF file for the component requiring the dynamic field insertion. Place your cursor in the exact section where the dynamic field should be inserted.
2. Insert the field by entering:

   `<@DFC123:Author@>` where *DFC123* is the dynamic field code, and *Author* is the field name. The RTF parser understands any string starting with <@ and ending with colon (:) as a code, and replaces the string starting <@ and ending @> with its value.

There cannot be any spaces between the token code and the <@ or colon (:).

3. Associate the RTF file to the created component. See Section 3.4.2.1 Associating Files for instructions on associating RTF files to components.

3.3.3.6 Editing Dynamic Fields

The following dynamic fields are editable at any time:

- **Name**
- **Description**
- **Field Prompt**
- **Java program name**

The following dynamic fields are editable only if not in use:

- **Type**
- **Data Type**
- **Maximum Display Length**
- **Drop Down value** (Can be changed at any time, but not deletable if in use).

To edit dynamic fields:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu

Steps

1. Navigate to **Administration > Dynamic Fields > User Defined**. The **Dynamic Fields: User Defined** page appears.
2. Select the hyperlink in the **Code** column. The **Dynamic Field Detail** page appears.
3. Make your desired changes.

4. Select **Apply** to save the changes.

3.3.3.7 Deleting Dynamic Fields

Seeded dynamic fields cannot be deleted. User defined dynamic fields that are not **In Use** can be deleted. Drop Down dynamic field values cannot be deleted if they are in use in a proposal.

To delete dynamic fields:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu

Steps

User defined dynamic fields that are not **In Use** can be deleted in two ways:

1. Navigate to **Administration > Dynamic Fields > User Defined**. The **Dynamic Fields: User Defined** page appears.
2. On the **Dynamic Fields: User Defined** page, Select the **Delete** icon for the corresponding dynamic field. This icon is enabled if the field is **not** in use or otherwise disabled. A warning page appears, asking you to confirm the deletion.
3. Select **Yes**. A message displays on the **Dynamic Fields: User Defined** page confirming the deletion.

   Or:

1. Select the hyperlink in the **Code** column. The **Dynamic Field Detail** page appears. Select the **Delete** button. This button is enabled if the field is **not** in use, otherwise it is disabled.
2. Select **Yes**. A message displays on the **Dynamic Fields: User Defined** page confirming the deletion. A warning page appears, asking you to confirm the deletion.

3.3.3.8 Viewing User-Defined Dynamic Fields

To view user-defined dynamic fields:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Dynamic Fields > User Defined**. The **Dynamic Fields** page appears, displaying the following dynamic field elements:
   - **Code**: Unique code for the dynamic field. Linked to the **Dynamic Field Details** page.
   - **Name**: Name of the dynamic field. Read-Only.
   - **Description**: Description of the dynamic field. Read-Only.
   - **Type** (User-Defined only): Dynamic Field type. Possible values are *Text*, *Drop Down*, and *Java Program*.
   - **Last Updated By**: FND user name of user who last updated the dynamic field.
   - **In Use**: If the dynamic field is in use, a checkmark icon displays. Otherwise the field is blank. A dynamic field is in use if it is used in any RTF file associated with a component document.
   - **RTF Display**: Format of the field as it should appear in the RTF file. A reference for users, representing dynamic fields in a document.
   - **Delete**: Displays an enabled delete icon unless the dynamic field is In Use.
2. To see dynamic field details, select the hyperlink in the **Code** column. The **Dynamic Field Detail** page appears.
3. To reorder the display based on ascending or descending display values, click on the title of the respective column.

3.4 Administering Proposal Components

Components help administrators divide their proposal content into independent elements, which can then be used again in different proposals.

Components are individual content elements that are combined into a template that is used to generate a comprehensive proposal. Content elements can include, for example, Cover Letter, Cover Sheet, Terms and Conditions, etc.

A component can contain multiple documents. For example, a component named *Cover Letter* can contain several types of cover letter documents such as *Cover Letter - Simple, Cover Letter - Expanded*, etc. Each document points to a separate RTF file, with its own individual content style. These files hold the actual content including standard text, graphs, tables, etc. that is used as boilerplate for the proposal. Each individual document is a separate RTF file that represents a style type for the component.

The RTF files also contain dynamic fields. After components are created, their corresponding documents are associated with RTF files that need to be uploaded to the component.

When a component is created, it is created in all of your installed languages. For example if English and Spanish are your installed languages, and you need to create two *Executive Summary* documents - *Simple* and *Expanded* - you would create the following two documents, and then associate two individual RTF files for each, with each RTF file created in its own language, and then translate the document name (the code is not translated):

- *Executive Summary Simple*
- *Executive Summary Expanded*

For more information, see Section 3.5.1, "Multi-Language Functionality".

This section contains the following tasks:

- Viewing Components
- Creating Proposal Components
- Editing Components
- Deleting Components

3.4.1 Viewing Components

To view components:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Components**. The Component page appears. The Components page displays the following component details:

   - **Code**. Component code. Hyperlinked to the Components Detail page.
   - **Name**. Component name. For example, *Cover Letter*.
   - **Description**. Description of component.
   - **Last Updated By**: FND user name of user who last updated the component.
   - **In Use**. Check icon displays if component is in use, otherwise blank. A component is in use if it is used in any proposal, and is an included component.
   - **Delete**. Delete icon is enabled if component is not in use, disabled if it is.

2. To view component details, click on the hyperlink in the **Code** column. The Component Detail page appears, displaying the following elements:

- In the **General** section:
  - **Code**: Component code
  - **Name**: Component name
  - **Description**: Component description
- In the **Documents** section:
  - **Code**: Document code
  - **Name**: Document name
  - **Associated File**: RTF file name

- **In Use**: Check indicating if document is in use. A document is in use if it is used in a proposal, or if it is a default document in a component-template relationship.
- **Upload File**: Icon - select to upload RTF file
- **Delete**: Disabled if in use

3. To reorder the display based on ascending or descending display values, click on the titles in the respective columns.

3.4.2 Creating Proposal Components

Proposal components are pieces of standard content that are included in templates, such as cover letters and executive summaries. Administrators can define components and create multiple documents for each component, reflecting the desired content that would vary from one template to another. For example, the component *Cover Letter* can include the documents *Simple Cover Letter* and *Professional Cover Letter*.

Components are created and then individual RTF file documents are associated to components.

Process:

- Create a component.
- Associate RTF file to the component.

To create proposal template components:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Components > Create Component**. The Create Component page appears. Enter a unique alphanumeric code in the **Component Code** field.

2. Enter a name in the **Name** field.
3. Optionally, enter a description in the **Description** field.
4. Select **Next**. The Create Component: Documents page appears. Your component can have multiple documents. A component must have at least one document. Create documents on this page.
5. Enter a unique document code and a unique name in the textfields. For example, Document Code: *DOC100*, Document Name: *Cover Letter - Simple*. To add/enter multiple documents, select **Add Row**.
6. When you are done entering all documents, select **Next**. The Create Component: Review page appears. Review the component information. Creating this component automatically makes it available to templates. You can edit some component details later.

> **Note:** You will **not** be able to modify the component code after a component is created

7. Select **Finish**. The Components page appears with a confirmation message. After creating this component, you must associate a file for every document from the Component detail page. See 5.4.2.1 below for instructions.

3.4.2.1 Associating Files

RTF files need to be created before you can associate files to components. The documents store content such as standard text, graphs, tables, dynamic fields, etc.

If you experience any problems when associating files, please see Appendix D, "Dynamic Field Structure in RTF Files".

To associate files:

1. Navigate to **Administration > Components > Component Code > Component Details**. The Component Details page appears.
2. For a particular document, select **Upload File**. The Upload File page appears.
3. Select the **Browse** button to browse and select the file from your desktop.
4. Verify that the file is in RTF format, and that the file contains no subdocuments, external links, or macros.

Note: The file must be in the current language. File associating must be done by language. You can only associate files for each individual language.

---

5. Select **Apply**. The Processing: Upload File page appears displaying a message that your file is being uploaded.
6. After the file has loaded, a confirmation message appears. If any dynamic fields were included in the RTF file, the message will display them. If there are no dynamic fields in the RTF file the second half of the message displays:

   No dynamic fields were identified.

   If any of the dynamic fields were entered incorrectly, the message will indicate which fields are incorrect. See Appendix D, "Dynamic Field Structure in RTF Files" for a list and description of common RTF file errors.
7. Select **OK**. If the upload was not successful, fix the problem and select **Apply** again.
8. The file appears in the **Associated File** column.
9. Select **Apply** again to return to the Components page.

3.4.3 Editing Components

The following can be done at any time:

- Editing component name
- Editing component description
- Editing document name
- Adding documents
- Associating files to a document

A component can be deleted only if it is **not** in use.

A document can be deleted only if it is not in use, or if it is not the default document for a component within a template.

To edit proposal components:

Prerequisites

None

Login

Log in to Oracle Proposals

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Components > Code**. The Component Details page appears.
2. Make your changes. The following fields are editable:
   - **Name**
   - **Description**
   - **Document Name**
3. Select **Apply** to apply the change, or **Cancel** to exit the flow.

3.4.3.1 Add Document

To add a document:

1. Select the hyperlink in the **Code** column. The Component Detail page appears.
2. Select **Add Document**. The Add Document page appears.
3. Enter a unique, alphanumeric code in the **Code** field.
4. In the Document Details section, enter a name in the **Name** field.
5. Optionally, select **Browse**, and chose an RTF formatted file to be associated with the document. When done, select **Apply**. The file uploads and will list any tokens.
6. The page refreshes with a message that your file is being processed. When done, select **OK** to return to the Component Detail page.
7. The new document appears in the **Documents** table.

3.4.3.2 Delete Document

To delete a document:

1. Select the hyperlink in the **Code** column. The Component Detail page appears.
2. In the **Documents** section of the page, select **Delete** for the document/s you wish to delete. A warning message appears, asking you to confirm the deletion.
3. Select **Yes**.

> **Note:** Documents that are being used in a template as a default document, or documents used in a proposal **cannot** be deleted.

3.4.3.3 Replacing RTF files

To replace RTF files for a component:

1. Select **Upload** for the document in the **Documents** section of the Component Details page. The Upload File page appears.
2. Select **Browse**. Locate the new file from your desktop, then associate it.
3. Select **Apply**. A processing confirmation message appears. When the file upload is successful, a message displays. If there are any tokens, they will be listed.
4. Select **OK**. You will be taken back to the Component Detail page. Note that RTF file name has changed in the **Associated File** column.
5. If necessary, change the name in the **Document Name** field.
6. Select **Apply**. The Components page appears.

3.4.4 Deleting Components

To delete components:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

You can delete components in either of the following ways:

1. Navigate to **Administration > Components.** The Component page appears. Select the hyperlink in the **Code** column for the component you want to delete. The Component Detail page appears.
2. Select **Delete**. A warning page appears, asking you to confirm the deletion.
3. Select **Yes** to continue. This permanently deletes the component and all its associated documents. It cannot be undone later.
4. The Components page appears, displaying a message verifying the deletion.

Or:

1. Select the **Delete** icon in the **Delete** column for the component you want to delete.
2. A warning page appears, asking you to confirm the deletion.
3. Select **Yes** to continue. This permanently deletes the component and all its associated documents. It cannot be undone later.
4. The Components page appears, displaying a message verifying the deletion.

Note: You **cannot** delete components that are In Use in a proposal.

3.5 Administering Proposal Templates

Templates provide a standard boilerplate structure for proposal generation that can be customized by users.

Template structure consists of components which in turn point to RTF format content, containing standard text, images, tables, and/or dynamic fields.

Administrators can determine the order in which components appear in a template. They can also make some components Mandatory.

While the creation of all other objects, such as dynamic fields and components automatically makes them available for use, templates are **not** automatically made available when created. Administrators need to publish templates to make them available for use.

This section contains the following:

- Multi-Language Functionality
- Creating Proposal Templates
- Viewing Proposal Templates
- Editing Proposal Templates
- Publishing Proposal Templates
- Unpublishing Templates
- Deleting Proposal Templates

The setup of categories, dynamic fields and components are prerequisites of template setup.

Setting up templates is the **last step** in the administration process.

3.5.1 Multi-Language Functionality

Even when published, a template is made available only in the language in which it is published. Publishing criteria for a given language is based on whether all components in the template have documents associated with them. Templates are created for all languages. Template names and descriptions are translatable, but template codes, component lists, and structures are common across all languages.

When creating templates, you need to decide upon the language in which your templates will be supported. Usually, different templates are used for different regions. For example, if you have two corporate regions, North America and Asia-Pacific, you could use different templates for each in a specific set of languages. North America would need templates in English, French, and Spanish, and Asia-Pacific would need templates in Chinese, Japanese, and English.

When you create a template, the component’s content needs to have been created in languages that the template will be published in. A template can be published if all the components have this content associated with it. For a template to be used in North America, component content is created in English, French, and Spanish so that it can be published in these three languages. The Template Detail page displays a list of languages in which a template has been published.

3.5.2 Creating Proposal Templates

Creating templates is a four-step process:

- Entering general information
- Adding components
- Choosing component order
- Reviewing/confirming template information

To create proposal templates:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Templates**. The Templates page appears.
2. Select **Create Template**. The Create Template: General Information page appears.
3. Enter a unique alphanumeric code for the template in the **Template Code** field.
4. Enter a name for the proposal in the **Template Name** field.
5. Optionally, enter a description in the **Description** field.
6. Select a category from the **Category** drop-down box.
7. Select **Next**. The Create Template: Components page appears.
8. Select **Add Component**. The Search and Select: Component page appears.
9. Search for components. You can search by component code and/or name. To search for components that start with the word *Cover*, for example, enter *Cover %*, then select **Go**. The results display in the **Results** table.
10. Select a component by using the checkbox in the **Select** column, then chose **Select**. Use **Select All** if all components displayed are to be included in this

template. After making a selection, the Create Template: Components page appears, displaying the component information in table format.

11. For each component, specify the following attributes:
    - **Mandatory**: Users cannot exclude mandatory components from their proposals
    - **Default Document**: A component can have multiple documents (see Components section for more details). You can specify a default document that is selected when users pick this template
12. Using the checkboxes in the components table, select **Mandatory** status for components requiring that status.
13. To specify a default document:
    a. Select the flashlight icon in the **Default Document** column. The Search and Select: Document page appears.
    b. Search for the document, select it, then press **Select**.
14. After all components have been added to the new template, and their attributes determined, select **Next**. The Create Template: Change Order page appears.
15. Using the Up and/or Down arrows, modify the order structure for the new template, or proceed to the next step if the component order is satisfactory.
16. Select **Next**. The Create Template: Review page appears. Review the template information you have provided. Creating this template will not automatically make it available to users for creating proposals. After creating it, you need to publish this template in each language to make it available.
17. After review, select **Finish** to create the template, **Back** to return to the previous step and modify information, or **Cancel** to exit the template creation workflow.
18. After selecting **Finish** on the Create Template: Review page, you are taken back to the Template page and a template creation confirmation message displays.

3.5.3 Viewing Proposal Templates

To view proposal templates:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Templates**. The Templates page appears. All available templates display with the following values:
   - **Code**: Hyperlinks to the Template Detail page.
   - **Name**: Template Name.
   - **Description**: Detailed description of template.
   - **Category**: Template Category.
   - **Last Updated By**: FND user name of user who last updated the template.
   - **Published**: Displays a check icon if the template is published. Will be blank if not published.
   - **In Use**: Displays a check icon if the template is in use. Will be blank if not in use. A template is in use if it is used in a proposal.
   - **Delete**: Displays delete icon if template is in not use. Otherwise the delete icon is disabled.
2. To view template details, select the hyperlink in the **Code** column.
3. To reorder the template display, use the sortable arrow in the respective columns.
4. To view more templates, if any, select the **Next** link.

3.5.4 Editing Proposal Templates

The following template elements are editable at any time:

- Template Name
- Template Description
- Template Category

Template Code is **never** editable.

Components can be added or removed from templates, and their order and/or attributes changed.

3.5.4.1 Editing Name, Description, and Category

To edit the template name, description or category:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Templates**. The Templates page appears. Select the hyperlink in the **Code** column for the template you want to edit. The Template Detail page appears with the template name.
2. For name or description changes, enter the new name or description in the **Name** or **Description** fields.
3. To change **Category**, use the drop-down box to select a new value.
4. Select **Apply**. The Template page appears with your changes reflected.

3.5.4.2 Adding Components

Components can only be added if the template is unpublished in all languages.

To add components in a template:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Templates**. The Templates page appears.
1. Select the hyperlink in the **Code** column for the template to which you want to add components.
2. Select **Add Components**. The Search and Select: Component page appears.
3. See steps 9-13 in section 3.5.2

3.5.4.3 Removing Components from Templates

Components can only be deleted from unpublished templates.

To remove components from a template:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Templates**. The Templates page appears. Select the **Delete** icon in the **Delete** column for the component you want to delete. A warning page appears, asking you to confirm the deletion.
2. Select **Yes** to delete, or **No** to cancel the deletion process. After clicking **Yes**, the Template Details page appears displaying a message confirming the deletion of this component from the template. This change is reflected only for new proposals. Proposals already using this template will not be affected by this change.

3.5.4.4 Changing Component Order

To change component order in a template:

Prerequisites
None

Login
Log in to Oracle Proposals.

Responsibility
Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps
1. Navigate to **Administration > Templates**. The Templates page appears.
2. Select the hyperlink in the **Code** column for the template you want to modify. The Template Detail page appears.
3. Select **Change Order**. The Change Order: Component page appears.
4. To change order, select a component and use the Up or Down arrows.
5. Select **Apply**. The Template Detail page appears with a confirmation message that your modification will be reflected for new proposals created with this template. Proposals already using this template will not be affected by this change.

3.5.4.5 Changing Default Document and Mandatory Attributes
Changes to default documents can **only** be made if the template is unpublished. If a change needs to be made to a default document in a published template, you **must** first unpublish the template in **all** languages before you can make the change.

To change component attributes in a template:

Prerequisites
None

Login
Log in to Oracle Proposals.

Responsibility
Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Templates**. The Templates page appears.
2. Select the hyperlink in the **Code** column for the template you want to modify. The Template Detail page appears.
3. In the **Components** section, make your changes for **Default Document** and **Mandatory** values. See section 3.5.2, steps 11-14 for instructions.
4. Select **Apply**.

3.5.5 Publishing Proposal Templates

Creating a template does not automatically make it available to users. Administrators must publish a template to make it available. Only unpublished templates display a **Publish in Current Language** button. After a template is published in a language, the list of languages the template is published in displays on the Template Detail page.

> **Note:** Templates can only be published when all components have an associated file for the default document.

To publish proposal templates:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Templates**. The Templates page appears.
2. Select the hyperlink in the **Code** column for the template you want to publish. The Template Detail page appears.

3. Select **Publish in Current Language**. A warning page appears asking you to confirm that you want to publish the template. Select **Yes** to publish, or **No** to cancel the publishing process.
4. After selecting **Yes**, the Template Detail page appears, confirming that the template is published.

> **Note:** You **cannot** add a component or change a default document in a template that is published in any language. To add components or change the default document, you must unpublish the template in **all** languages.

3.5.6 Unpublishing Templates

Templates that are currently published display an **Unpublish in Current Language** button.

To unpublish templates:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

1. Navigate to **Administration > Templates**. The Templates page appears.
2. Select the hyperlink in the **Code** column for the template you want to unpublish. The Template Detail page appears.
3. Select **Unpublish in Current Language**. A warning page appears asking you to confirm that you want to unpublish the template. Select **Yes** to unpublish, or **No** to cancel the unpublishing process.
4. After selecting **Yes**, the Template Detail page appears, confirming that the template is unpublished.

3.5.7 Deleting Proposal Templates

Only templates that are **not** in use can be deleted.

Proposal templates can be deleted if they have not yet been used for generating a proposal.

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu.

Steps

Templates can be deleted in one of two ways:

1. Navigate to **Administration > Templates**. The Templates page appears.

1. Select the **Delete** icon for the template you want to delete. A warning page appears, asking you to confirm the deletion.
2. Select **Yes** to delete, or **No** to cancel the deletion and return to the Template page. If you select **Yes**, the Template Detail page appears with a message confirming the deletion.

   Or:

1. Select the hyperlink in the **Code** column for the template you want to delete. The Template Detail page appears.
2. Select **Delete**. A warning page appears, asking you to confirm the deletion. Select **Yes** to delete, or **No** to cancel the deletion and return to the Template page. If you select **Yes**, the Template Detail page appears with a message confirming the deletion.

3.6 RTF Files Overview

The RTF files are the Proposal Component files that contain the actual content (text, graphics, tables, etc.) that represent proposal components. You will need to create these files in your preferred editor/word processing application, and then save them as RTF files. After creation, these files are then uploaded and mapped to individual proposal components. These RTF files make up the individual sections of the proposal.

This section provides guidelines, suggestions, and information on creating RTF files. Topics include:

- Creating RTF Files Guidelines
- Dynamic Field Structure in RTF Files

3.6.1 Creating RTF Files Guidelines

Please note the following important guidelines for RTF file creation:

- Page setup that distinguishes odd, even, and first pages in a document are not supported. Definitions for these parameters from the individual documents will be lost when the final document is merged.
- Only one section is allowed within a single document. It is not possible to create nested sections in RTF files. Parameter definitions for nested sections will be lost in the proposal creation process.
- Headers and footers have to be carefully input. These settings will be carried over to subsequent documents unless they are overwritten and defined.
- All images must be anchored. The exact position of an image in the merged document needs to be set beforehand in the editor you use to create your RTF file.
- Oracle Proposals does not support the use of standard Table of Contents styles. You cannot create an RTF file using a word processor and/or editor that uses a specific Table of Content style.
- There cannot not be any spaces between the inserted dynamic field token code and the character combination that proceeds the code ("<@") and the colon (":"). For example, **<@PRP001:Proposal Name @>** is valid but the following are not:
  - **<@PRP001:Proposal Name@>**
  - **<@PRP001   :Proposal Name@>**
  - **<   @PRP001:Proposal Name@>**

  Entries such as these result in errors during the RTF file upload.

3.6.2 Dynamic Field Structure in RTF Files

Oracle Proposals provides seeded **Structure Dynamic Fields** in order to accommodate the addition of multiple quotes to a proposal as well as those proposals with quotes containing multiple lines. These structure tokens allow users to designate the structure where multiple quotes, lines or any other data needs to be inserted into the document. These are only used for organizing quote-related information in RTF files.

See the following appendixes for information:

- Appendix D, "Dynamic Field Structure in RTF Files"
- Appendix B, "Seed Data"

Note: Any quote-related dynamic field placed outside the control structure will be substituted using the primary quote in the proposal.

3.7 Other Administrative Tasks

This section lists other tasks to be performed by the administrator. Topics include:

- Section 3.7.1, "Setting Profile Options"
- Section 3.7.2, "Creating Proposals Using Unpublished Templates"
- Section 3.7.3, "Concurrent Program for Offline Generation"

3.7.1 Setting Profile Options

When implementing Oracle Proposals, you must set specific profile options. Please see the *Oracle Proposals Implementation Guide, Appendix A: Oracle Proposals Profile Options* for instructions and information.

3.7.2 Creating Proposals Using Unpublished Templates

Only users given the appropriate profile can create proposals using unpublished templates. Please see *Chapter 4, "Creating Proposals"* for creating proposal instructions and the *Oracle Proposals Implementation Guide* for profile information.

3.7.3 Concurrent Program for Offline Generation

The determination of generating proposals offline or online is set by profile options. Please see the *Oracle Proposals Implementation Guide, Appendix A: Oracle Proposals Profile Options* for details, and the *Oracle Applications System Administrator's Guide* for instructions.

4

Creating Proposals

Sections in this chapter include:

- Section 4.1, "Overview of Creating Proposals"
- Section 4.2, "Creating Standalone Proposals"
- Section 4.3, "Creating a Proposal from a Quote"

4.1 Overview of Creating Proposals

You create proposals to position a product or service as a possible solution to a customer's business need. The creation of proposals is based on pre-determined templates, allowing you to use pre-existing content, and standardized document layouts, as well as information already stored in the database during the sales cycle.

Proposals can be created in one of two ways:

- Standalone from the Oracle Proposals Dashboard page
- From a quote on the Quote Details page

If a proposal is created from a quote, the quote context, including quote and customer information, is carried over to the proposal. If created standalone, you have to provide this information.

There are two basic steps to create a proposal: First, you select from a list of templates that an administrator has built out for you. Second, you configure the proposal details.

This topic covers:

- Section 4.1.1, "Creating Proposals Setup"
- Section 4.1.2, "Integration with Oracle Quoting"

- Section 4.1.3, "Accessing Oracle Proposals"

4.1.1 Creating Proposals Setup

Oracle Proposals can be set up as a standalone application or can be integrated with other applications such as Oracle Quoting. Setup is done by an administrator. Please see Chapter 2, "Overview of Using Oracle Proposals" for more information.

4.1.2 Integration with Oracle Quoting

If implemented with Oracle e-Business Suite, users can create proposals from a quote, add quotes to proposals, and use quote information as part of their proposal. Oracle Proposals retrieves the latest quote information when a proposal is generated.

For more information, see the *Oracle Proposals Implementation Guide*, the *Oracle Quoting User Guide*, and the *Oracle Quoting Implementation Guide*.

4.1.3 Accessing Oracle Proposals

To access Oracle Proposals, a user must be an FND user and a resource:

Note: All users MUST be assigned either the Proposal Homepage or the Proposal Main menu.

Users only have access to the proposals that they create.

4.2 Creating Standalone Proposals

- Creating a Standalone Proposal With a Quote
- Creating a Standalone Proposal Without a Quote

4.2.1 Creating a Standalone Proposal With a Quote

To create a standalone proposal with a quote:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Create Proposal**. The **Create Proposal: Select Template** page appears.
2. Select a template category using the **Filter By Category** drop-down. Select **Go**. The page refreshes, displaying a list of templates from that category.
3. Using the radio button in the **Select** column, select a template.

> **Note:** Administrators with the **Access to Unpublished Templates** profile set to **Yes** will see a list of all published **and** unpublished templates in their user language. Other users have access to published templates only.

4. To view and/or compare the template components, select **Show** in the **Details column**. The components for this template display in table format. Select **Hide** to close the components list display.
5. Select **Next**. The **Create Proposal: Proposal Details** page displays with the chosen template name and description values defaulted into their corresponding fields on this page.
6. Enter a new name for the proposal in the **Proposal Name** field if you wish to change it. The proposal name is defaulted from the name of the template used to create the proposal.
7. Select the flashlight icon next to the **Customer Name** field. The **Search and Select: Customer** page displays.
8. Select an option from the **Search** drop-down. Enter a keyword or number for a *begins with* match in the textfield. Select **Go**. The results display in table format in the **Results** section.

9. Select a customer from the **Results** table using the radio button in the **Select** column. Click **Select**. You will return to the **Create Proposal** page.
10. Optionally, change the description in the **Proposal Description** textfield.
11. Optionally, if the customer receiving the proposal is an organization, select a contact. Select the flashlight icon next to the **Contact Name** field. **The Search and Select: Contact** page displays.
12. Enter a keyword or keyword% for a *begins with* match. Select **Go**. The results display in table format in the **Results** section.
13. Select a contact from the **Results** table using the radio button in the **Select** column. Click **Select**. You will return to the **Create Proposal** page.
14. Select a due date for the proposal using the calendar icon. The field populates with the due date. Select **Apply**.
15. You must also specify which document style should be used for each components file if there is more than one document style for that component:
    a. Select the hyperlink in the **Name** column. The components page displays.
    b. In the **Documents** section select a document from the table using the **Select** radio button. To preview the document, select the icon in the **Preview** column.
16. Select **Apply**. The **Components** page displays. If you want to exclude any components, see Chapter 5, "Determining Proposal Content".

    Checkmarks in the **Status** column indicate complete components. **If all of the components are complete, proceed to step 17**. Crossmarks indicate incomplete components that require your attention. For any components with crossmarks in the **Status** column:

    a. Select the hyperlink in the **Name** column. The components page displays.
    b. In the **Personalization** section at the bottom of the page, provide the values needed in the fields that appear.
    c. In the **Quotes** section, select **Add Quote**. The Search and Select: Add Quote page displays. Select either **Quote Name** or **Quote Number** using the **Search** field. Enter a value in the **Search** textfield and then select **Go**. The search results display in the **Results** table. Select a quote by checking the checkbox in the **Select** column. Press **Select**. You are taken back to the components page and the quote information displays in the **Quote** table.
    d. To add more quotes, select the **Add Quote** button and repeat step c.) above.

   e. To make one quote primary, select the radio button in the **Select** column, then select **Make it Primary**.
   f. Verify that the quote information is correct in the **Quote** table.
   g. Select **Apply**. The **Components** page displays a message verifying that the update to the specific component was successful.

17. To change component order, select **Change Order**. The Change Components Order page displays.
18. Using the Up/Down arrows, make your component order selection then click **Apply**. The Components page displays a message that your reordering was applied and the table reflects your changes.
19. Select **Overview**. The Overview page displays. Verify that all information is correct and that the **Generate Proposal Document** button is enabled. If this button is not enabled, you will have to provide additional information in order to generate this proposal.

4.2.2 Creating a Standalone Proposal Without a Quote

To create a standalone proposal without a quote:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Create Proposal**. The **Create Proposal: Select Template** page displays.
2. See Section 4.2.1, "Creating a Standalone Proposal With a Quote" steps 2-14, then proceed to step 3 below:
3. You need to specify which document style should be used for each component's file:

a. Select the hyperlink in the **Name** column. The component's page appears.

b. In the **Documents** section select a document from the table using the **Select** radio button. To preview the document, select the icon in the **Preview** column.

4. Select **Apply**. The **Components** page displays. If you want to exclude any components, see Chapter 5, "Determining Proposal Content".

   Checkmarks in the **Status** column indicate complete components. **If all of the components are complete, proceed to step 17 in section 4.2.1**. Crossmarks indicate incomplete components that require your attention. For any components with crossmarks in the **Status** column:

   a. Select the hyperlink in the **Name** column. The components page displays.

   b. In the **Personalization** section at the bottom of the page, provide the values needed.

   c. Select **Apply**. The **Components** page appears, displaying a message at the top, verifying that the update to the specific component was successful.

5. To change component order, select **Change Order**. The Change Components Order page appears.

6. Using the Up/Down arrows, make your component order selection then select **Apply**. The Components page displays a message that your reordering was applied.

7. Select **Overview**. The Overview page appears. Verify that all information is correct and that the **Generate Proposal Document** button is enabled. If this button is not enabled, you will have to provide additional information in order to generate this proposal.

4.3 Creating a Proposal from a Quote

All Oracle Quoting users can create proposals from a quote unless security is enabled. In that case, only those users with update access to the quote can create a proposal from that particular quote.

You are **not** allowed to create proposals from the following types of quotes:

- Lower version quotes
- Quotes in *Order Submitted* status
- Expired quotes

- Quotes with incomplete pricing
- Quotes with incomplete tax
- Quotes submitted for batch pricing
- Quotes that have been converted to Shopping Carts in Oracle *i*Store
- Quotes templates

In addition, you **cannot** add the following types of quotes to a proposal, **nor** can you create a proposal from one:

- Quotes that are inaccessible to the user
- Quotes for other customers

Note: It is possible that an eligible quote may become ineligible after a proposal has been created from a quote. If this happens you will receive an error message when attempting to generate the proposal.

To create a proposal from a quote:

Reference
Oracle Quoting User Guide

Prerequisites
None

Login
Log in to Oracle Proposals.

Responsibility
Oracle Quoting user.

Steps
1. In Oracle Quoting, navigate to the Overview page for the selected quote from which you will be creating your proposal.

2. Select the **Proposals** link listed under **Sales Information** from the left sidebar. A page appears displaying the Quote header information. If any proposals have already been created from this quote, they will display in the table. Otherwise the table will be blank.
3. Select **Create Proposal**. The Create Proposal: Select Template page appears.
4. See Section 4.2.1, "Creating a Standalone Proposal With a Quote" steps 2-19 to finish creating your proposal if you need to add a different quote to the proposal. If you don't have to add another quote to the proposal, see Section 4.2.2, "Creating a Standalone Proposal Without a Quote" for instructions.

5

Determining Proposal Content

Sections in this chapter include:

- Section 5.1, "Overview of Proposal Content"
- Section 5.2, "Viewing Proposal Components"
- Section 5.3, "Including and Excluding Components"
- Section 5.4, "Changing Component Order"
- Section 5.5, "Personalizing Proposal Sections"
- Section 5.6, "Adding Quotes to a Proposal"
- Section 5.7, "Removing Quotes"
- Section 5.8, "Editing Header Details"
- Section 5.9, "Changing Document Version Status"

5.1 Overview of Proposal Content

The Overview page is the central location where all proposal versions are listed. The Components page displays a list of components for each template. You may need to complete some components by providing values for dynamic fields within a component, or for a quote if it is required for a component.

Note: Proposals **cannot** be modified when in the *Generation in Progress* status.

5.2 Viewing Proposal Components

To view proposal components:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposal Name hyperlink > Overview > Components >**. The Components page appears, displaying the following header information:
   - Name
   - Description
   - Due Date
   - Customer
   - Contact
   - Template
   - Status
   - Latest Document Version
   - Created By
2. The proposal components are displayed in the **Proposal Components** section with the following values:
   - **Select**: This column shows all included components as checked, all excluded components as unchecked, and all mandatory components as checked and the checkbox disabled.
   - **Name**: Displays the component name as a hyperlink for included components. Selecting the link accesses the **Component Details** page.

- **Description**: Component description.
- **Document**: Displays the document name.
- **Preview**: Displays an icon that, when selected, opens the document in a secondary window.
- **Status**: Displays a checkmark if the component is complete, or an *X* if incomplete.

5.2.1 Previewing Component Documents

To preview component documents:

1. Navigate to **Dashboard > Proposal Name hyperlink > Overview > Components**. The Components page appears.
2. Select the icon in the **Preview** column for the component. The file opens up in a secondary window.
3. Close the window to close the file and return to the **Components** page.

5.2.2 Viewing Component Details

To view component details:

1. Navigate to **Dashboard > Proposal Name hyperlink > Overview > Components**. The Components page appears.
2. Select the hyperlink in the **Name** column for the component. The component details page displays the following:
   - Header details
   - **Documents** section: Displays, in table format, which documents are available for this component. The Document name and a Preview icon display in this table.
   - **Personalization** section: Contains personalization options, showing a list of all dynamic fields based on document selected, if available. Otherwise it will display the following message:

     There are no personalization options available for the selected document format.
   - **Quote** section: This section displays **only** if the document selected contains quote tokens. Displays a list of quotes associated with the proposal if the

document requires a quote. You can add/delete quotes as well as designate a primary quote in this section.

3. To choose a different document for this component, select the radio button in the document's **Select** column. The page refreshes and displays the tokens for the document in the **Personalization** section.
4. To preview a document, select the icon in the **Preview** column. The file appears in a secondary window.

5.3 Including and Excluding Components

You can choose to include or exclude certain components within a proposal - however, some components may be Mandatory.

To include or exclude components in a proposal:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposal Name hyperlink > Components**. The Components page appears.
2. Using the checkboxes in the **Select** column, select or deselect the component(s) you want to include/exclude from the proposal. If a component is Mandatory, you will see a disabled checkbox. You **cannot** exclude Mandatory components.
3. To select all components, use the **Select All** link.
4. Select **Apply**. The page refreshes with a confirmation message verifying which components will be included based on your modification(s). Note that any components you exclude are still listed in the table but there is no corresponding checkmark in the **Select** column.

Note: You must generate a new version of the proposal before the changes are reflected.

5.4 Changing Component Order

You can change the order of the included components. By rearranging the components, you can choose what type of component structure the proposal will have, and can decide where certain sections of the proposal should go.

To modify proposal structure:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposal Name hyperlink > Components**. The **Components** page appears.
2. Select **Change Order**. The **Change Components Order** page appears.
3. Select a component from the list.
4. Using the Up or Down arrows, rearrange the components.
5. Select **Apply**. The Components page appears with a message confirming your component restructuring.

Note: You must regenerate the proposal before the changes are reflected.

5.5 Personalizing Proposal Sections

A checkmark in the **Status** column on the Components page indicates that a component is complete. An X in the **Status** column means that a component is incomplete and you need to provide a value.

You will need to provide values for all dynamic fields for a component in the Personalization section of the details page.

5.5.1 Adding Values for Dynamic Fields

To add values for dynamic fields:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposal Name hyperlink > Components > Name**. The details page for the component appears.
2. In the **Personalization** section, provide values for any of the dynamic field objects using the texfields and/or drop-downs.
3. Select **Apply**. The **Components** page appears with a message confirming your update. If the changes fail for any reason, an error message displays explaining the problem.

5.6 Adding Quotes to a Proposal

The following quotes **cannot** be added to proposals:

- Lower version quotes
- Quotes in *Order Submitted* status

- Expired quotes
- Quotes with incomplete pricing
- Quotes with incomplete tax
- Quotes submitted for batch pricing
- Quotes that are inaccessible to the user
- Quotes for other customers
- Quotes that have converted into Oracle iStore Shopping carts
- Quote templates

Note: It is possible that an eligible quote may become ineligible after it has been added. If this happens, you will receive an error message when attempting to generate the proposal.

To add quotes to a proposal:

Prerequisites
None

Login
Log in to Oracle Proposals

Responsibility
Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps
1. Navigate to **Dashboard > Proposal Name hyperlink > Components**. The **Components** page appears.
2. Select the link in the component's **Name** column. The component's details page appears.
3. Select **Add Quote**. The **Search and Select: Quote** page appears.

4. Enter your search criteria in either the **Quote Name** or **Quote Number** search texfields using either a full or partial name or number in the textfield.
5. Select **Go**. The search results display in the **Results** section with the following values:
   - Select
   - Quote Name
   - Number/Version
   - Expiration Date
   - Total Amount
6. Select a quote or quotes by selecting the checkbox in the **Select** column.
7. Press **Select**. The **Search and Select: Quote** page closes and you are taken back to the **Components** page. The quote information displays in the **Quote** section.

   To make this quote the primary one for the component, select **Make it Primary**. The page refreshes and a checkmark displays in the **Primary** column. If there is only one quote, it becomes the primary quote by default.

5.7 Removing Quotes

To remove quotes from a proposal component:

Prerequisites

None

Login

Log in to Oracle Proposals

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposal Name hyperlink > Components**. The **Components** page appears.

2. Select a link in the **Name** column for the component you want to remove the quote from. The component's detail page appears.
3. In the **Quotes** section, select the radio button in the **Select** column to remove the quote.
4. Select the icon in the **Remove** column. The page refreshes and the selected quote information is removed.

Note: If there are multiple quotes, the primary quote cannot be removed. You will need to define another quote as primary before you can delete one currently defined as primary.

5.8 Editing Header Details

You are able to edit the following header details:

- Proposal Name
- Description
- Due Date
- Contact

The following header details are **not** editable:

- Customer
- Template
- Status
- Latest Document version
- Created By

To edit header details:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposal Name hyperlink > Overview**. The Overview page appears.
2. To edit **Name** or **Description**, enter new values in the textfields.
3. To change **Due Date**, select the calendar icon and pick a new date.
4. To change **Contact**, click the flashlight icon next to the **Contact** field. The Search and Select: Contact page appears. Search for, and then select the new contact from the **Results** table, then click **Select** and return to the Overview page. The new contact data displays in the **Contact** field.
5. Select **Apply** after making changes. The page refreshes, displaying a confirmation message.

5.9 Changing Document Version Status

For available documents, you can change the status of document versions.

To change document version status:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposal Name hyperlink > Overview**. The **Overview** page appears.
2. Using the **Status** drop-down, select a new status for the document.

3. Select **Apply**. The page refreshes reflecting the change in the **Status** field.

6 Generating Proposals

This chapter covers:

- Section 6.1, "Overview of Generating Proposals"
- Section 6.2, "Generating Proposals"
- Section 6.3, "Uploading Proposals"
- Section 6.4, "Downloading Proposals"
- Section 6.5, "Viewing Remarks"

6.1 Overview of Generating Proposals

Once your proposal has been created, and all elements are complete, you need to generate the proposal document. During the generation process, all elements of the proposal are pulled together into one cumulative RTF format document based on all of the proposal components, and other elements such as added quotes and any dynamic field data entered by users.

During this process, all elements of the proposal, including associated quotes, are checked for completeness and validity. If any quotes have become invalid, an error message displays.

If all proposal elements are valid, another check is made to decide whether to generate the document online or offline. This determination is made based on a profile value set by the Oracle Proposals Administrator specifying the maximum size of the generated document for which generation is done online.

If the total size of the generated proposal is less than the profile value, generation is done online. If the total size is larger than the profile value, the proposal is generated using the offline concurrent program. See Chapter 3, "Administering Oracle Proposals", the *Oracle Proposals Implementation Guide, Appendix A: Oracle*

Proposals Profile Options, and the *Oracle Applications System Administrator's Guide* for more information.

Note: The Generate Proposal Document button is only enabled if all included components are valid and complete. The proposal must also have at least one included component.

6.2 Generating Proposals

Once you have built the proposal content, a proposal can be generated in RTF format. This document is the physical file shared with the customer. Proposals can be generated many times as long as all of its components are complete. Once a proposal has been generated, it is available for you to download or email to customers.

You can generate documents as often as needed. The generated document always reflects the latest content at time of generation. Generated proposals are automatically saved to the database, versioned, and available for download. You **cannot** modify a proposal or its elements while it is in *Generation in Process* status. If you attempt to generate a proposal while it in *Generation in Process* status, you will get an error message until the proposal has finished generating.

Remember that you can only generate proposals if the **Generate Proposal Document** button is enabled. This button is available on both the Overview and the Components page.

Note: Problems may occur with customized styles when using some word processing programs/editors to create your RTF file content. When the proposal is generated, the parser reads the customized document style definition for the first document, and then applies it to all components if the customized style names are the same. For example, if you create a customized style named *Internal Use* when creating your RTF file content for the first component with the specification that it use the Font face Times New Roman and Size 12, and your second file also contains a customized style called *Internal Use* but with a different specification of Font face Arial and Size 10, when the proposal is generated it will convert the style *Internal Use* for the first component to have the specification of Font face Arial and Size 10 and override the definition in the first component.

This section contains the following tasks:

- Generating Proposals Online

- Generating Proposals Offline

6.2.1 Generating Proposals Online

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Dashboard menu.

Steps

1. Navigate to **Dashboard > Proposal name link**. If all components of the proposal are complete, the **Generate Proposal Document** button is enabled. If it is disabled, you cannot generate the document until you have completed all components.
2. Select **Generate Proposal Document**.
3. If the generation is successful, a message displays confirming the generation.
4. If the online generation fails, you will get an error message.
5. For proposals that are generated successfully online, a row is created in the **Proposal Documents** section displaying:
   - An enabled radio button in the **Select** column
   - **Version**: Version number
   - **Document Name**: Generated document's RTF file name. Hyperlinked so that you can click to open and/or save the document to your local drive.
   - **Creation Process**: Displays *Generated*.
   - **Status**: Drop-down. Choose either *Draft* or *Final*.
   - **Remarks**: Remarks display **only** after a generated proposal has been uploaded as you can only enter remarks when uploading - not when generating a proposal.

6. You can view and/or edit the document in the **Proposal Document** section of the **Overview** page.

6.2.2 Generating Proposals Offline

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposal name link**. If all components of the proposal are complete, the **Generate Proposal Document** button is enabled. If it is disabled, you cannot generate the document until you have completed all components.
2. Select **Generate Proposal Document**. The page refreshes, displaying a confirmation message that the document generation is in progress. While the document is attempting to generate, the **Creation Process** column displays a hyperlinked status message *Generation in Process*. Selecting this link takes you to the Information page where you can view the request id and, if you want, cancel the generation process.
3. While the proposal generation is in process, the following values display in the **Proposal Document** section:
   - The radio button in the **Select** column is disabled.
   - **Document Name** displayed as Read Only
   - **Creation Process** displays as a hyperlink. Click to access the Information page.
   - **Status**, **Remarks** and **Email History** are blank.

   a. For proposals generated successfully offline, the following values appear in the **Proposal Documents** section:

- An enabled radio button in the **Select** column.
- **Version**: Version number
- **Document Name**: Generated document's RTF file name. Hyperlinked so that you can click to open and/or save the document to your local drive.
- **Creation Process**: Displays *Generated*.
- **Status**: Drop-down. Choose either *Draft* or *Final*.
- **Remarks**: Remarks display **only** after a generated proposal has been uploaded as you can only enter remarks when uploading - not when generating a proposal.

b. If the offline generation fails, the status appears as *Generation Failed*.

4. You can view and/or edit the document in the **Proposal Document** section of the **Overview** page.

6.3 Uploading Proposals

To upload proposals:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Overview**. The **Overview** page appears.
2. Select **Upload Proposal Document**. The **Upload Proposal Document** page appears.
3. Select **Browse** to browse for and select the file. The file name populates the **File** textfield.
4. Select a status - Draft or Final -using the **Status** drop-down.

5. Optionally, add any remarks in the **Remarks** textfield.
6. Select **Apply**. The Overview page appears, either displaying a confirmation message that the file was uploaded successfully, or an error message.
7. The document name and version number display in the **Proposal Documents** section, displaying *User Uploaded* in the **Creation Process** column.

6.4 Downloading Proposals

To download proposals:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

There are two ways to download generated proposals:

- Navigate to **Dashboard > Overview**. The **Overview** page appears.
    a. Select a document using the radio button in the **Select** column.
    b. Select **Download**. The File Download window opens.
    c. Select **Save** to save your downloaded file, or **Open** to view it.

    Or:
- Navigate to **Dashboard > Overview**. The **Overview** page appears.
    a. Select the hyperlink in the **Document Name** column. The document opens
    b. The File Download window opens.
    c. Select **Save** to save your downloaded file, or **Open** to view it.

6.5 Viewing Remarks

If remarks were entered during the proposal upload process, they can be viewed later.

To view remarks:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Overview**. The **Overview** page appears.
2. Select the icon in the **Remarks** column. The **Remarks** page appears, displaying the entered Remarks text in the **Proposal Remarks** section of the page.
3. Select **Finish** to return to the **Overview** page.

7 E-mailing Proposals

Sections in this chapter include:

- Section 7.1, "E-mailing Proposals to Customers"
- Section 7.2, "Viewing E-mail History"

7.1 E-mailing Proposals to Customers

There are two profiles that need to be configure before using the Oracle Proposals email functionality - *PRP:SMTP Server Name*, and *PRP:SMTP Server Port*. Please see the *Oracle Proposals Implementation Guide* for details.

Oracle Proposals allows you to select the appropriate recipients and then email proposals to them.

To email proposals:

Prerequisites

None

Login

Log in to Oracle Proposals

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposal Name > Overview**.

2. Using the radio button in the **Select** column, select a document.
3. Select **Email Proposal**. The Email Proposal page opens.

   Your email address is the default in the **From** field. The value in the **To** field defaults to the email address of the customer contact.
4. To change or add recipients, select **Edit "To" List**. The **Email Proposal: Edit "To" Recipients** page appears.
5. Select a name listed under **Available recipients** and press the **Move** arrow. To remove all, press **Move All**.
6. To remove recipients listed under **Selected recipients**, select a name and then press **Remove**. To remove all recipients, press **Remove All**.
7. To change or add copied (CC) recipients, select **Edit "CC"** List. **The Email Proposal: Edit "CC" List** page appears. See steps 5 and 6 above.
8. Select **Apply**. You return to the **Email Proposal** page, and your selections are reflected in the **To** and **CC** fields.
9. The proposal document name appears in the **Attachment** section. This document is zipped and attached to the email. To send the document as a regular, unzipped attachment, uncheck the **Zip attachment in the email** checkbox.
10. Enter a subject in the **Subject** textfield.
11. Optionally, enter a text message in the **Text** field.
12. Select **Send** to send the message,
13. After selecting **Send**, the **Overview** page appears with either a message indicating that the proposal has been emailed successfully, or an error message stating why the proposal was not sent. If the proposal emailing was successful, the Email History icon displays.

7.2 Viewing E-mail History

Oracle Proposals maintains an e-mail history.

To view e-mail history:

Steps

1. Navigate to **Dashboard > Proposal Name > Overview**. The **Proposal: Overview** page appears.

2. Select the icon in the **Email History** column. The **Email History** page appears displaying the header information and the e-mail information in the **Email History** table. Display values for this table are:
   - **Sent Date:** Date e-mail was sent
   - **Sent By:** Sender’s name
   - **Sent To:** Names of all recipients
   - **Email Message:** E-mail subject displayed as a hyperlink
3. To view e-mail messages, select the link in the **Email History** column. The **Email History: Email Message** page appears displaying
   - **To**: E-mail recipient
   - **CC**: Copied recipients
   - **Attachment**: RTF file name
   - **Subject**: Subject entered in **Subject** field.
   - **Text**: Text entered in **Text** field.
4. Select **Finish**. The **Email History** page appears.
5. Select **Finish** to go back to the **Proposal Overview** page.

8 Accessing Proposals

Sections in this chapter include:

- Section 8.1, "Overview of Accessing Proposals"
- Section 8.2, "View Recent Proposals"
- Section 8.3, "View Proposals Due in X Days"
- Section 8.4, "Search for Proposals"

8.1 Overview of Accessing Proposals

From the Dashboard homepage you can look at recently created proposals, and proposals that are due within the next 10 days.

The search functionality allows you to search for proposals based on a variety of search parameters.

8.2 View Recent Proposals

Proposals that display in this table are those that have been created, viewed, or modified recently.

To view recent proposals:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Recent Proposals**. Recent proposals are displayed at the top of the page in the **Recent Proposals** section. Display values are:
   - **Name**: Proposal name displayed as a hyperlink
   - **Description**: Proposal description
   - **Customer**: Customer for whom proposal was created
   - **Due Date**: Current due date for proposal
   - **Status**: Proposal status - either Draft or Complete
2. Select the hyperlink in the **Name** column to access the Overview page for the selected proposal.
3. Select **Full List** to change the page display to a full list of all recent proposals.

8.3 View Proposals Due in *X* Days

The proposals that display in this table are those that have a due date within the parameter set by the due date profile (Please see the O*racle Proposals Implementation Guide* for more information).

To view a list of proposals due in *X* days:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Proposals Due in X Days**. Display values are:

- **Name**: Proposal name displayed as a hyperlink
- **Description**: Proposal description
- **Customer**: Customer for whom proposal was created
- **Due Date**: Current due date for proposal
- **Status**: Proposal status - either Draft or Complete

2. Select the hyperlink in the **Name** column to access the Overview page for the selected proposal.
3. Select **Full List** to change the page display to a full list of all proposals due within *X* days.

8.4 Search for Proposals

Selecting **Search Proposals** from the Dashboard accesses the Proposals Search page where you can perform detailed searches. Search parameters on this page are:

- Proposal Parameters
  - Proposal name – textfield
  - Status – Drop down. Draft or Complete
  - Create Date From – Date field with calendar icon
  - Create Date To – Date field with calendar icon
  - Due Date From – Date field with calendar icon
  - Due Date To – Date field with calendar icon
- Customer Parameters
  - Customer name – textfield
  - Contact name – textfield

To search for proposals:

Prerequisites

None

Login

Log in to Oracle Proposals.

Responsibility

Oracle user whose responsibility has been assigned the Proposal Main menu or the Proposal Homepage menu.

Steps

1. Navigate to **Dashboard > Search Proposals**. Search results list all matching rows that begin with the search text. To refine your search results, enter search criteria in as many of the search parameters as possible.
2. Use % as a trailing wildcard after your search criteria in the textfields. For example:

   Entering *INT%* will search for *Internal*, *International*, *Intermediate*, etc.
3. Select **Go** to perform a search on non-null parameters. The results display in the **Search Results** section with the following values:
   - **Name**: Proposal name displayed as a hyperlink
   - **Description**: Customer for whom proposal was created
   - **Customer**: Customer proposal created for
   - **Due Date**: Current due date for proposal
   - **Status**: Proposal status - Draft or Complete
4. Select the hyperlink in the **Name** column to access the Overview page for the selected proposal.
5. If there are other proposals that matched your search criteria but did not display on the first page of results, select **Next** to view them.

Part III

Appendixes

This part contains the following appendixes:

- Appendix A, "Oracle Proposals User Interface Reference"
- Appendix B, "Seed Data"
- Appendix C, "Security in Oracle Proposals"
- Appendix D, "Dynamic Field Structure in RTF Files"
-

A

Oracle Proposals User Interface Reference

This appendix provided descriptions of the user interface (UI) tabs, pages, and fields for the Oracle Proposals 11*i* application. The tables in this appendix summarize the UI objects, types, descriptions, and usage for each page described.

A.1 Dashboard Page

Use the Dashboard page to view proposals, initiate the create proposal process, and search for proposals.

Tasks

You can perform the following tasks on this page:

- View recent proposals
- View proposals due within X days
- Create proposals
- Search for proposals

Reference

The following table lists the Dashboard page elements and their descriptions.

Table A–1 Dashboard Page Reference

Component	Type	Description
Create Proposal	Button	Accesses the Create Proposal: Select Template (first step of the create proposal process) page. Repeated at bottom of page.

Component	Type	Description
Search Proposal	Button	Accesses the Proposal Search page where you can perform searches on proposals. Repeated at bottom of page.
Recent Proposals	Section	Section listing recently viewed, created, or modified proposals.
Full List	Button	Accesses full page display of all Recent Proposals.
Name	Hyperlink	Displays proposal name as a hyperlink. Accesses Overview page of selected proposal.
Description	Read Only	Displays proposal description.
Customer	Read Only	Displays customer name
Due Date	Read Only	Displays proposal due date
Status	Read Only	Displays proposal status: Either Draft or Complete.
Due within 10 days	Section	Section listing all proposals due within X days.
Full List	Button	Accesses full page displays of all proposals Due Within X days.
Name	Hyperlink	Displays proposal name as a hyperlink. Accesses Overview page of selected proposal.
Description	Read Only	Displays proposal description.
Customer	Read Only	Displays customer name.
Due Date	Read Only	Displays proposal due date.
Status	Read Only	Displays proposal status:either Draft or Complete.

A.2 Recent Proposals Full List

Use the Recent Proposals Full List page to view all recent proposals.

Tasks

You can perform the following tasks on this page:

- View all recent proposals
- Accesses proposal overview pages.

Reference

This table lists the Recent Proposals Full List elements and their descriptions.

Table A–2 Recent Proposals Full List Reference

Component	Type	Description
Name	Hyperlink	Displays proposal name as a hyperlink. Accesses Overview page of selected proposal.
Description	Read Only	Displays proposal description.
Customer	Read Only	Displays customer name.
Due Date	Read Only	Displays proposal due date.
Status	Read Only	Displays proposal status: Either Draft or Complete.

A.3 Proposals Due Within X Days Full List

Use the Proposals Due Within X Days Full List page to view all proposals due within X days.

Tasks

You can perform the following tasks on this page:

- View all proposals due within X days.
- Access proposal overview pages.

Reference

This table lists the Proposals Due Within X Days Full List elements and their descriptions.

Table A–3 Proposals Due Within 10 Days Full List Reference

Component	Type	Description
Name	Hyperlink	Displays proposal name as a hyperlink. Accesses Overview page of selected proposal.
Description	Read Only	Displays proposal description.
Customer	Read Only	Displays customer name.
Due Date	Read Only	Displays proposal due date.

Component	Type	Description
Status	Read Only	Displays proposal status: Either Draft or Complete.

A.4 Create Proposal: Select Template

Use the Create Proposal: Select Template page to select a template for proposal creation, and to view template components.

Tasks

You can perform the following tasks on this page:

- Choose a template category
- Select a template
- View a template’s components
- View template details.

Reference

This table lists the Create Proposal: Select Template elements and their descriptions.

Table A–4 Create Proposal: Select Template Page Reference

Component	Type	Description
Filter By Category	Drop-down	Select template category.
Go	Button	Press to view templates in categories based on filtered search selection.
Select	Radio Button	Select to identify template to be used in proposal creation.
Details	Column	Select Show to display all components for this template. Select Hide to close the display and view just the basic template information.
Name	Read Only	Displays template name.
Description	Read Only	Displays template description.
Cancel	Button	Select to cancel template selection and return to the Dashboard page.

Component	Type	Description
Next	Button	Select to access Create Proposal: Details page (second step in proposal creation process). Necessary to complete the proposal creation process.

A.5 Create Proposal: Proposal Details

Use the Create Proposal: Proposal Details page to enter, view, and modify proposal details.

Tasks

You can perform the following tasks on this page:

- Enter proposal details
- View proposal details
- Change proposal details
- View template name

Reference

This table lists the Create Proposal: Proposal Details page elements and their descriptions

Table A–5 Create Proposal Page: Proposal Details Reference

Component	Type	Description
Proposal Name	Textfield	Enter proposal name. Defaults to template value.
Customer Name	LOV	Enter or search for customer name.
Flashlight icon	Icon	Select to search on values entered in the Customer Name field. Accesses the Search and Select: Customer Name window.
Proposal Description	Textfield	Enter description for proposal. Defaults to template value.
Contact Name	LOV	Enter or search for contact name. Relevant only is the customer is an organization. Optional.

Table A–5 Create Proposal Page: Proposal Details Reference

Component	Type	Description
Flashlight icon	Icon	Select to search on values entered in the Contact Name field. Accesses the Search and Select: Contact Name window.
Due Date	Textfield/Calendar tool	Enter due date.
Template	Read Only	Name of template used to create proposal.
Cancel	Button	Cancels the proposal creation process and takes you back to the Homepage.
Back	Button	Press to return to Create Proposal: Choose Template page.
Apply	Button	Press to finish the proposal creation process. Accesses the confirmation page.

A.6 Proposal Overview Page

Use the Proposal Overview page to view proposal details, change proposal data, and upload, download and email proposals.

Tasks

You can perform the following tasks on this page:

- View proposal header details and document information
- Change proposal header details and document information
- Generate proposals.
- Upload proposals.
- Download proposals
- Email proposals.
- View Email History
- View Remarks
- Change document status
- View proposal RTF files.

Reference

This table lists the Proposals Overview page elements and their descriptions.

Table A–6 Proposals Overview Page Reference

Component	Type	Description
Generate Proposal Document	Button	Select to generate proposal. Enabled only if all components are complete. Otherwise disabled.
Cancel	Button	Press to cancel any changes made.
Apply	Button	Press after making any changes to apply changes.
General	Section	Section listing general proposal information.
Name	Textfield	Proposal name. Editable. Required.
Template	Read Only	Displays name of template from which proposal was created.
Description	Textfield	Proposal description.
Status	Read Only	Proposal status. Either Draft or Complete.
Latest Document Version	Read Only	Current version number.
Due Date	Calendar tool	Due date for proposal. Editable. Required.
Created By	Read Only	Name of proposal creator.
Customer	Read Only	Customer name.
Contact	Read Only	Contact name.
Proposal Documents	Section	Section listing document information for the proposal.
Upload Proposal Document	Button	Select to access the Upload Proposal Document page, where new versions of the proposal can be uploaded.
Select Document and...	Prompt text	Instructional text for Proposal Documents section tasks.
Download	Button	Press to access the selected document. File can be saved or opened from here.

Component	Type	Description
Email Proposal	Button	Press to access the Email Proposal page.
Select	Radio Button	Select to choose document in that row.
Version	Read Only	Document version number
Document Name	Link	Proposal file in RTF format. Select link to access file.
Creation Process	Read Only	Describes creation process for file.
Status	Drop-down	Document status. To change, select either Draft or Final.
Remarks	Icon	If there are any remarks, an icon displays that, when pressed, accesses the Remarks page. Otherwise blank.
Email History	Icon	Press to read email history. Accesses Email History page. Displays only if there is any email history - otherwise this column is blank.

A.7 Proposal Components Page

Use the Proposal Components page to view and change component data.

Tasks

You can perform the following tasks on this page:

- View proposal header details and document information
- Generate proposals
- Include and exclude components
- Change component order
- View component documents
- Preview document files
- View component details

Reference

This table lists the Proposal Components page elements and descriptions.

Table A–7 Proposal Component Page Reference

Component	Type	Description
Generate Proposal Document	Button	Select to generate proposal. Enabled only if all components are complete. Otherwise disabled.
Cancel	Button	Press to cancel any changes made.
Apply	Button	Press after making any changes to apply changes.
Overview	Section	Section listing header information.Linked text accesses the Overview page when selected.
Name	Read Only	Proposal name.
Template	Read Only	Displays name of template from which proposal was created.
Description	Read Only	Proposal description.
Status	Read Only	Proposal status.
Latest Document Version	Read Only	Current version number.
Due Date	Read Only	Due date for proposal.
Created By	Read Only	Creator of proposal.
Customer	Read Only	Customer name.
Contact	Read Only	Contact name.
Proposal Components	Section	Section listing proposal components and component information.
Change Order	Button	Press to access the Change Order page where component order can be modified.
Select	Checkbox	Select to include components. Deselect to exclude components.
Name	Hyperlink	Displays component name as a hyperlink. Press to access the component details page.
Description	Read Only	Component description.
Document	Read Only	Displays document type/style.
Preview	Icon	Press to access RTF file for component.

Component	Type	Description
Status	Gif	Will be checked if component is complete. Will display an *X* if component requires you to enter missing data.

A.8 Change Components Order Page

Use the Change Components Order page to modify the proposal's structure.

Tasks

You can perform the following task on this page:

- Change component order

Reference

This table lists Change Components Order page elements and descriptions.

Table A–8 Change Components Order Reference

Component	Type	Description
Change Components Order	Multi-select table	To change order, choose a component and click on up or down arrow.
Move Up	Arrow	Press after selecting component to move up.
Move Top	Arrow	Press after selecting component to move it to the top.
Move Down	Arrow	Press after selecting component to move down.
Move Bottom	Arrow	Press after selecting component to move it to the bottom.
Cancel	Button	Press to cancel changes.
Apply	Button	Press after changing component order to apply changes.

A.9 Proposal Component Details

Use the Proposal Component Details page to view and modify component details.

Note: The UI objects actually displayed depend on your component context.

Tasks

You can perform the following tasks on this page:

- View proposal component details.
- Modify proposal component details.
- Add Quotes
- Remove Quotes
- Preview RTF files.
- Designate a Quote as Primary.
- View or change personalization values.

Reference

The following table lists the Proposal Component Details page elements and their descriptions.

Table A–9 Proposal Component Details Reference

Component	Type	Description
Name	Read Only	Proposal name.
Template	Read Only	Template used to create proposal.
Description	Read Only	Proposal description.
Status	Read Only	Status. Either Draft or Final.
Due Date	Read Only	Proposal due date.
Latest Document Version	Read Only	Current document version.
Customer	Read Only	Customer name.
Created by	Read Only	Proposal creator name.
Contact	Read Only	Contact name.
Documents	Section	Section listing document information.
Select	Radio button	Select to select document in row.
Document	Read Only	Document name.
Preview	Icon	Select to open and/or save document's rtf file.

Component	Type	Description
Personalization	Section	Section listing personalization information. If there are no personalization options available for the selected document format, this will be blank.
Proposal Date	Textfield/Calendar tool	View or change proposal date.
Subject	Textfield	View or change subject.
Summary	Textfield	View or change summary.
Document Control Type	Drop down	View or select control type for document.
Quotes	Section	Section listing quote information.
Add Quote	Button	Select to access the Search and Select: Quote page.
Tip	Tip text	Instructional text.
Make It Primary	Button	Press after selecting a quote to make your selection the primary quote for the proposal component.
Select	Radio button	Use to select quote row.
Customer	Read Only	Customer name.
Number	Read Only	Quote number.
Version	Read Only	Current version number.
Status	Read Only	Quote status.
Expiration Date	Read Only	Quote expiration date.
Total Amount	Read Only	Total amount of quote.
Primary	Check gif	Displays a checkmark if this is the primary quote. Otherwise blank.
Remove	Icon	Select to remove the quote.
Cancel	Button	Select to cancel any changes made and return to the component page.
Apply	Button	Select to apply changes.

A.10 Proposal Remarks Page

Use the Proposal Remarks page to view remarks.

Tasks

You can perform the following task on this page:

- View proposal remarks

Reference

The following table lists the Proposal Remarks page elements and their descriptions.

Table A–10 Proposal Remarks Reference

Component	Type	Description
Name	Read Only	Proposal name.
Template	Read Only	Template used to create proposal.
Description	Read Only	Proposal description.
Status	Read Only	Status. Either Draft or Final.
Due Date	Read Only	Proposal due date.
Latest Document Version	Read Only	Current document version.
Customer	Read Only	Customer name.
Created by	Read Only	Proposal creator name.
Contact	Read Only	Contact name.
Proposal Remarks	Section	Section displaying Remarks textfield.
Remarks	Read Only textfield	Displays entered remarks in textfield.
Finish	Button	Select to return to the Overview page.

A.11 Upload Proposal Document

Use the Upload Proposal Document page to upload proposal documents.

Tasks

You can perform the following tasks on this page:

- View proposal header details.
- Upload proposals.

Reference

This table lists the Upload Proposal Document elements and descriptions.

Table A–11 Upload Proposal Documents Reference

Component	Type	Description
Name	Read Only	Proposal name
Template	Read Only	Displays name of template from which proposal was created.
Description	Read Only	Proposal description.
Status	Read Only	Proposal status.
Due Date	Read Only	Due date for proposal.
Latest Document Version	Read Only	Current version number.
Customer	Read Only	Customer name.
Created By	Read Only	Name of proposal creator.
Contact	Read Only	Contact name.
Upload Proposal	Section	Section providing uploading functionality and information.
File	Textfield	Populated with file after name after upload.
Browse	Button	Select to browse for file.
Status	Drop-down	Select status. Either Draft or Final.
Remarks	Textfield	Enter any remarks. Optional.
Cancel	Button	Select to cancel upload process.
Apply	Button	Select after uploading file. Takes you back to Overview page.

A.12 Email Proposal Page

Use the Email Proposal page to e-mail proposals.

Tasks

You can perform the following tasks on this page:

- Email proposals.
- Edit To and CC recipients.

Reference

This table lists the Email Proposal elements and their descriptions.

Table A–12 Email Proposal Reference

Component	Type	Description
Cancel	Button	Press to cancel the email process and return to the Overview page.
Edit To List	Button	Press to access the Edit To List page where you can edit the To recipients.
Edit CC List	Button	Press to access the Edit CC List page where you can edit the CC recipients.
Send	Button	Press to send the email message.
From	Read Only	Email sender.
To	Read Only	Email recipients.
CC	Read Only	Copied recipients.
Attachment	Read-only	RTF file name of document.
Zip attachment in the email	Checkbox	Check to zip attached document. Deselect to send document as a regular attachment.
Subject	Textfield	Enter email subject.
Text	Textfield	Enter text for email message. Optional.

A.13 Email Proposal: Edit TO/CC pages

Use the Email Proposal: Edit TO/CC pages to select the appropriate recipients for e-mailing.

Tasks

You can perform the following task on these pages:

- Edit To and CC recipients.

Reference

This table lists the Email Proposal: Edit pages elements and descriptions.

Table A–13 Email Proposal:Edit Reference

Component	Type	Description
Cancel	Button	Press to cancel the recipient edit process and return to the Email Proposal page.
Apply	Button	Press to apply edits made to recipient list.
Available Recipients	Multi-select table	Table listing all available recipients. To edit recipients, select a recipient from the list and press either of the Move arrows.
Move	Arrow	Press to move selected recipients to Selected Recipients table.
Move All	Arrow	Press to move all recipients to Selected Recipients table.
Remove	Arrow	Press to remove selected recipients from Selected Recipients table and back to the Available Recipients table.
Remove All	Arrow	Press to remove all recipients from Selected Recipients table and back to the Available Recipients table.
Selected Recipients	Multi-select table	Table listing all selected recipients. To edit recipients, select a recipient from the list and press either of the Remove arrows.

A.14 Proposal: Email History

Use the Proposal:Email History page to view e-mail history.

Tasks

You can perform the following tasks on this page:

- View Email History.
- View Email message.

- View proposal header details.

Reference

This table lists and describes the Email History page elements.

Table A–14 Email History Reference

Component	Type	Description
Name	Read Only	Proposal name.
Template	Read Only	Template used to create proposal.
Description	Read Only	Proposal description.
Status	Read Only	Proposal Status. Either Draft or Final.
Due Date	Read Only	Proposal due date.
Latest Document Version	Read Only	Current version number of proposal document.
Customer	Read Only	Customer receiving proposal.
Created By	Read Only	Name of proposal creator.
Contact	Read Only	Contact for organization.
Email History	Section	Section listing Email History details.
Sent Date	Read Only	Date email sent.
Sent By	Read Only	Name of email sender.
Sent To	Read Only	Customer name.
Email Message	Linked text	Subject text displayed as a hyperlink. Press to access the Email History: Email Message page.
Finish	Button	Press to return to the Email History page.

A.15 E-mail History:E-mail Message

Use the E-mail History: E-mail Message page to view e-mail message details.

Tasks

You can perform the following task on this page:

- View e-mail message details.

Reference

This table lists and describes the E-mail History: E-mail Message page elements.

Table A–15 E-mail History: E-mail HIstory Reference

Component	Type	Description
To	Read Only	"To" recipients.
CC	Read Only	Copied recipients.
Attachment	Read Only	RTF file name.
Subject	Read Only	E-mail subject.
Text	Read Only	Text for e-mail message.
Finish	Button	Select to return to the Email History page.

A.16 Proposals Search Page

Use the Proposals Search page to search for proposals.

Tasks

You can perform the following tasks on this page:

- Search for Proposals
- View search results
- Access **Overview** page for proposals that display in search results

Reference

This table lists and describes the Search Proposals page elements.

Table A–16 Search Proposals Reference

Component	Type	Description
Proposal Parameters	Section	Section listing proposal parameters.
Proposal Name	Textfield	Enter proposal name to be searched.
Status	Drop-down	Select a status. Either Draft or Final.

Component	Type	Description
Create Date From	Textfield/Calendar tool	Enter a search value for proposals created beginning from this date.
To	Textfield/Calendar tool	Enter a search value for proposals created up until this date.
Due Date From	Textfield/Calendar tool	Enter a search value for proposals with due dates beginning on this date.
To	Textfield/Calendar tool	Enter a search value for proposals with due dates ending on this date.
Customer Parameters	Section	Section listing customer parameters.
Customer Name	Textfield	Enter customer name.
Contact Name	Textfield	Enter contact name.
Go	Button	Press to initiate search based on value/s entered for Customer and/or Contact Name entries.
Search Results	Section	Section listing search results. Values will be blank until search parameters are entered and Go button is selected.
Name	Hyperlink	Proposal name displays as a hyperlink. Select to access Overview page for the proposal.
Description	Read Only	Displays proposal description.
Customer	Read Only	Displays name of proposal's customer.
Due Date	Read Only	Displays proposal due date.
Status	Read Only	Displays proposal status. Either Draft or Final.
Previous	Link	Select to see previous page search results. Enabled only if search result page is not the first page.
Next	Link	Select to see next page of search results. Enabled only if search results is longer than one page.

A.17 Search and Select: Quote Page

Use the Search and Select: Quote page to search for and select quotes.

Tasks

You can perform the following tasks on this page:

- Search for Quotes
- Add Quotes to a proposal

Reference

The following table lists the Search and Select: Quote page elements and their descriptions.

Table A–17 Search and Select:Quote Reference

Component	Type	Description
Search	Section	Section listing search options.
Tip text	Read Only	Instructional text providing suggestion for searches.
Quote Name	Text field	Enter Quote name or a partial value followed by%.
Quote Number	Textfield	Enter Quote number or a partial value followed by%.
Go	Button	Press after entering quote search criteria. Search results display in table listing all matches for entered search criteria.
Select All	Link	Press to select all quotes in list.
Select None	Link	Press to deselect all quotes in list.
Select	Checkbox	Check to select quote in row.
Name	Read Only	Quote name.
Number	Read Only	Quote number.
Version	Read Only	Quote version number.
Status	Read Only	Quote status.
Expiration Date	Read Only	Quote expiration date.
Total Price	Read Only	Total price for quote.

Component	Type	Description
Cancel	Button	Press to cancel the add quote process and return to the detail page for the component.
Select	Button	Press after making a selection from the search results table.

A.18 Templates Page

Use the Templates page to view, create, and delete templates. This page is the default homepage for administrative users.

Tasks

You can perform the following tasks on this page:

- View a list of templates.
- View template details.
- Create templates.
- Delete unpublished templates and templates not in use.

Reference

The following table lists the Templates page elements and their descriptions.

Table A–18 Templates Page Reference

Component	Type	Description
Create Template	Button	Press to begin the create template process. Accesses the Create Template: General Information page.
Code	Hyperlinked text	Displays the template code as a hyperlink. Press to access the Template Detail page.
Name	Read Only	Template name.
Description	Read Only	Template description.
Category	Read Only	Template category.
Last Updated By	Read Only	Displays name of user who last updated the template.
Published	Check gif	Displays a checkmark if the template is published. Otherwise blank.

Component	Type	Description
In Use	Check gif	Displays a checkmark if the template is in use. Otherwise blank.
Delete	Icon	Select icon to delete template. Disabled if template is published and/or in use.

A.19 Template Detail Page

Use the Template Detail page to view and modify template data, and to publish/unpublish templates.

Tasks

You can perform the following tasks on this page:

- View template details
- Publish/Unpublish templates
- View template components
- Add components to a template
- Change component order for a template
- Make certain components Mandatory
- Delete components from a template
- View component details

Reference

The following table list the Template Detail page elements and their descriptions.

Table A–19 Template Detail Reference

Component	Type	Description
Publish/Unpublish in Current Language	Button	Press to publish or unpublish a template for current session language. Will be Publish... if template is unpublished, and Unpublish...if template is published.
Delete	Button	Select to delete template. Disabled if template is in use and/or published.

Component	Type	Description
Cancel	Button	Press to cancel your changes and return to the Templates page.
Apply	Button	Press to apply any changes made and return to the Templates page.
General	Section	Section listing general template details.
Code	Read Only	Template code.
Name	Textfield	Enter template name.
Description	Textfield	Enter template description.
Category	Drop-down	Select a template category.
Components	Section	Section listing component information and component modification options.
Tip Text	Read Only	Instructional text for adding/changing components.
Add Components	Button	Accesses the Search and Select: Component page where you can add components to a template.
Change Order	Button	Press to access the Change Order: Component page.
Code	Hyperlinked text	Displays template code as hyperlinked text. Accesses the Component Detail page.
Name	Read Only	Component name.
Description	Read Only	Component description.
Default Document	Read Only	Displays default document name.
Mandatory	Checkbox	Check to make this component mandatory.
Remove	Icon	Select icon to remove component from template.

A.20 Create Template: General

Use the Create Template: General page to enter general template information.

Tasks

You can perform the following tasks on this page:

- Enter template Code, Name, and Description.

- Choose template category.

Reference

The following table lists the Create Template: General page elements and their descriptions.

Table A–20 Create Template: General Reference

Component	Type	Description
General	Workflow Marker	Will be filled during this step, displaying workflow step status.
Components	Workflow Marker	Should be blank during this step.
Change Order	Workflow Marker	Should be blank during this step.
Review	Workflow Marker	Should be blank during this step.
Cancel	Button	Cancels template creation process and takes you back to the Templates page.
Code	Textfield	Enter an alphanumeric and unique code for the template.
Name	Textfield	Enter a unique template name.
Description	Textfield	Enter a description for the template. Optional.
Category	Drop-down	Select template category.
Next	Button	Advances to Create Template, Page 2. Nothing will be saved at this point but Code, Name, and Category need to be set before proceeding.

A.21 Create Template: Components

Use the Create Template: Components page to enter component information in a template.

Tasks

You can perform the following tasks on this page:

- Add/remove Components to a template.

- Make some components mandatory
- Specify default documents for a component.

Reference

The following table lists the Create Template: Component page elements and their descriptions.

Table A–21 Create Template: Component Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Components	Workflow Marker	Will be filled during this step, displaying workflow step status.
Change Order	Workflow Marker	Should be blank during this step.
Review	Workflow Marker	Should be blank during this step.
Cancel	Button	Select to cancel the create template process and return to the Templates page.
Add Component	Button	Accesses the Search and Select: Component page where you search for and select components for this template.
Code	Read only	Component code
Name	Read only	Component name
Description	Read only	Component description
Default Document	Textfield with search icon	Displays component name. Search icon accesses the Search and Select: Default Document page where you search for and select a default document for the component.
Mandatory	Checkbox	Check to indicate if document is a mandatory component of the template.
Remove	Icon	Select to remove component from the template.
Back	Button	Press to go back to the Create Template: General page.
Next	Button	Press to go to the Create Template: Change Order page (Step 3 in the create template process).

A.22 Search and Select: Component

Use the Search and Select: Component page to search for and select components.

Tasks

You can perform the following tasks on this page:

- Search for components
- Select components to be added to template.

Reference

The following table lists the Search and Select: Component page elements and their descriptions.

Table A–22 Search and Select: Component Reference

Component	Type	Description
Search	Section	Section listing search parameter options.
Component Code	Textfield	Enter component code or a partial value followed by%
Component Name	Textfield	Enter component name or a partial value followed by%.
Go	Button	Select to initiate the search for components based on search criteria entered. Search results display in Results section table after pressing this button.
Results	Section	Section listing search results in table format.
Select All	Link	Select to select all components.
Select None	Link	Select to deselect all components.
Select	Checkbox	Check to select component in this row.
Code	Read Only	Displays component code.
Name	Read Only	Displays component name.
Description	Read Only	Displays component description.
Cancel	Button	Select to cancel the component selection and return to the Create Template: Components page.
Select	Button	Press to apply component selection/s and return to the Create Template: Components page.

A.23 Create Template: Change Order

Use the Create Template: Change Order page to change component order for templates.

Tasks

You can perform the following task on this page:

- Change component order.

Reference

The following table lists the Create Template: Change Order page elements and their descriptions.

Table A–23 Create Template: Change Order Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Components	Workflow Marker	Should be blank during this step.
Change Order	Workflow Marker	Will be filled during this step, displaying workflow step status.
Review	Workflow Marker	Should be blank during this step.
Cancel	Button	Select to cancel the change component order process and return to the Create Template: Components page.
Change component order table	Multi-select table	Table listing all components.
Arrow top	Arrow	Press after selecting component to move component to the top of the list.
Arrow up	Arrow	Press after selecting component to move component up.
Arrow bottom	Arrow	Press after selecting component to move component to the bottom of the list.
Arrow down	Arrow	Press after selecting component to move component down.

Component	Type	Description
Back	Button	Select to return to the Create Template: Component page.
Next	Button	Select to go to the Create Template: Review page (last page in create template process).

A.24 Create Template: Review

Use the Create Template: Review page to review the template details you have entered during the template creation process.

Tasks

You can perform the following task on this page:

- Review template details.

Reference

The following table lists and describes the Create Template: Review page elements and their descriptions.

Table A–24 Create Template: Review Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Components	Workflow Marker	Should be blank during this step.
Change Order	Workflow Marker	Should be blank during this step.
Review	Workflow Marker	Should be blank during this step.
Tip	Tip text	Instructional text providing information necessary for the review template process.
Cancel	Button	Select to cancel template creation and return to the Templates page.
General	Section	Section listing template header information.
Code	Read Only	Template code.

Component	Type	Description
Name	Read Only	Template name.
Description	Read Only	Template description.
Category	Read Only	Template category.
Published In	Read Only	Lists languages this template is published in.
Components	Section	Section listing component information for the template.
Code	Read Only	Component code.
Name	Read Only	Component name.
Description	Read Only	Component description.
Default Document	Read Only	Default document name.
Mandatory	Check gif	Displays a checkmark if component is mandatory. Otherwise blank.
Cancel	Button	Select to cancel template creation. All information will be lost and you will be taken back to the Templates page.
Back	Button	Select to return to Create Template: Change Order page.
Finish	Button	Select to finish the create template process and create the template. If template is created successfully, you are taken back to the Templates page where a confirmation message displays. Otherwise, you receive an error message.

A.25 Template Details: Change Order

Use the Template Details: Change Order page change component order for a template.

Tasks

You can perform the following task on this page:

- Change component order

Reference

The following table lists the Template Details: Change Order page elements and their descriptions.

Table A–25 Template Details: Change Order Page Reference

Component	Type	Description
Template Code	Read Only	Template code.
Name	Read Only	Template name.
Description	Read Only	Template description.
Change Order	Multi-select table	To change order, choose a component and click on up or down arrow.
Move Up	Arrow	Press after selecting component to move up.
Move Top	Arrow	Press after selecting component to move it to the top.
Move Down	Arrow	Press after selecting component to move down.
Move Bottom	Arrow	Press after selecting component to move it to the bottom.
Cancel	Button	Press to cancel changes.
Apply	Button	Press after changing component order to apply changes.

A.26 Components Page

Use the Components page view and create components.

Tasks

You can perform the following tasks on this page:

- View components
- Create components
- Delete components

Reference

The following table lists the Components page elements and their descriptions.

Table A–26 Components Page Reference

Component	Type	Description
Create Component	Button	Accesses the Create Component page.
Code	Link	Component code displayed as a hyperlink. Accesses the Component Detail page.
Name	Read Only	Component name.
Description	Read Only	Component description.
Last Updated By	Read Only	Name of user who last updated the component.
In Use	Checkmark gif	Displays a checkmark if the component is in use. Otherwise blank.
Delete	Icon	Select to delete the component. Enabled only if the component is not in use. Disabled if component is used in a proposal.
Previous	Link	Select to view previous page in list.
Next	Link	Advances to next display page.

A.27 Component Details

Use the Component Details page to view and modify components.

Tasks

You can perform the following tasks on this page:

- View component details
- Edit component name and description
- View RTF files associated with component
- Upload files
- Add documents
- Delete documents

Reference

The following table lists the Component Details page elements and their descriptions.

Table A–27 Component Details Reference

Component	Type	Description
General	Section	Section listing general component information.
Code	Read Only	Component code.
Name	Textfield	Component name. Editable.
Description	Textfield	Component description. Editable.
Documents	Section	Section listing document information for the component.
Tip	Tip text	Instructional text.
Add Document	Button	Accesses the Add Document page.
Code	Read Only	Document code.
Name	Textfield	Document name.
Associated File	Link	RTF file name displayed as a link. Select to open file in secondary window.
In Use	Checkmark gif	Displays a checkmark if this document is in use. Otherwise blank.
Upload File	Icon	Accesses the Upload File page.
Delete	Icon	Select to delete a document. Enabled only if document is not in use.
Cancel	Button	Select to cancel the component modification and return to the Components page.
Apply	Button	Select to apply changes made to component.

A.28 Create Component: General Information

Use the Create Component: General Information page to enter Code, Name, and Description when creating a component.

Tasks

You can perform the following tasks on this page:

- Enter component Code
- Enter component Name

- Enter component Description

Reference

The following table lists the Create Component: General Information page elements and their descriptions.

Table A–28 Create Component: General Information Reference

Component	Type	Description
General	Workflow Marker	Will be filled during this step, displaying workflow step status.
Documents	Workflow Marker	Should be blank during this step.
Review	Workflow Marker	Should be blank during this step.
Code	Textfield	Enter a unique and alphanumeric code.
Name	Textfield	Enter component name.
Description	Textfield	Enter a description indicating the use of the component. Optional.
Cancel	Button	Select to cancel the component creation process and return to the Components page.
Next	Button	Select to access the Create Component: Documents page (Step 2 in the component creation process).

A.29 Create Component: Documents

Use the Create Component: Documents page to create documents for components.

Tasks

You can perform the following tasks on this page:

- Create documents
- Enter document Code
- Enter document Name
- Delete documents

Reference

The following table lists the Create Component: Documents page elements and their descriptions.

Table A–29 Create Component: Documents Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Documents	Workflow Marker	Will be filled during this step, displaying workflow step status.
Review	Workflow Marker	Should be blank during this step.
Tip	Tip text	Instruction text for component document steps.
Code	Textfield	Enter document name.
Name	Textfield	Enter document name.
Delete	Icon	Select to delete document in row.
Add Row	Button	Select to add row to document list.
Cancel	Button	Select to cancel the document creation process and return to the Components page.
Back	Button	Select to return to the Create Components: General page.
Next	Button	Select to access the Create Component: Review page. At least one document name and code must be entered before proceeding.

A.30 Create Component: Review

Use the Create Component: Review page to review component information entered during the create component process.

Tasks

You can perform the following tasks on this page:

- View component details
- Create components

Reference

The following table lists the Create Component: Review page elements and their descriptions.

Table A–30 Create Component: Review Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Documents	Workflow Marker	Should be blank during this step.
Review	Workflow Marker	Will be filled during this step, displaying workflow step status.
Tip	Tip Text	Instructional text for component review.
Cancel	Button	Select to cancel component creation and return to the Components page.
General	Section	Section listing Component details
Code	Read only	Component code.
Name	Read only	Component name
Description	Read only	Component description
Documents	Section	Section listing document information for component.
Tip	Tip Text	Instructional text for component documents.
Code	Read Only	Document code.
Name	Read Only	Document name.
Apply	Button	Select to create the component and return to the Components page. If component creation was successful, you receive a confirmation message. Otherwise you receive an error message.

A.31 Add Document

Use the Add Document page to add documents to a component.

Tasks

You can perform the following tasks on this page:

- Enter document Code

- Browse for and select RTF files

Reference

The following table lists the Add Document page elements and their descriptions.

Table A–31 Add Document Reference

Component	Type	Description
Cancel	Button	Select to cancel adding document and return to the Component Detail page.
Apply	Button	Select to apply document addition.
Tip	Tip Text	Instructional text.
Code	Textfield	Enter a unique and alphanumeric code.
Document Details	Section	Section listing document details.
Tip	Tip Text	Instructional text for documents.
Language	Read Only	Document language.
Name	Textfield	Enter a name for the document.
Associated File	Textfield	Populates with document's RTF file name after it is added.
Browse	Button	Select to browse for and select the document.

A.32 Upload File

Use the Upload File page to upload files to components.

Tasks

You can perform the following tasks on this page:

- Upload files to components
- Browse for and select files

Reference

The following table lists the Upload File page elements and their descriptions

Table A–32 Upload File Reference

Component	Type	Description
Tip	Tip Text	Instructional text for uploading files.
Cancel	Button	Select to cancel the upload file process and return to the Component Details page.
Apply	Button	Select to associate file to component after it has been selected.
Language	Read Only	File language.
File	Textfield	Populated with file name after it is uploaded.
Browse	Button	Select to browse for and upload the file.

A.33 Processing: Upload File

Use the Processing: Upload File page to view the uploading process status.

Tasks

You can perform the following task on this page:

- View processing status for uploading files.

Reference

The following table lists the Processing: Upload File page elements and their descriptions

Table A–33 Processing: Upload File Reference

Component	Type	Description
Uploading File	Text	Text displays current status of your file upload.
Clock	Icon	Denotes uploading in process.
Cancel	Button	Select to cancel the upload.

A.34 Dynamic Fields: User Defined

Use the Dynamic Fields: User Defined page to view, create, and delete user defined dynamic fields.

Tasks

You can perform the following tasks on this page:

- View user defined dynamic fields
- Create user defined dynamic fields
- Delete user defined dynamic fields

Reference

The following table lists the Dynamic Fields:User Defined page elements and their descriptions.

Table A–34 Dynamic Fields: User Defined Reference

Component	Type	Description
Create Dynamic Field	Button	Accesses the Create Dynamic Field: General Details page.
Code	Link	Dynamic field code displayed as a hyperlink. Select to access the Dynamic Field Detail page.
Name	Read Only	Dynamic Field name.
Description	Read Only	Dynamic Field description.
Type	Read Only	Dynamic Field type. Either Text, List of Values, or Java Program.
Last Updated By	Read Only	Name of user who last updated dynamic field.
In Use	Check gif	Displays a checkmark if dynamic field is in use.
RTF Display	Read Only	Displays the RTF display for the dynamic field entry.
Delete	Icon	Select to delete dynamic field. Enabled only if field is not in use.
Previous	Link	Select to return to previous display list of dynamic fields. Enabled only if there is more than one page display and if you are not on that first page.
Next	Link	Select to see next page of dynamic field list. Enabled only if there is/are other page/s display/s.

A.35 Create Dynamic Field: General Details

Use the Create Dynamic Field: General Details page to enter general details when creating a user defined dynamic field.

Tasks

You can perform the following tasks on this page:

- Enter dynamic field Code
- Enter dynamic field Name
- Enter dynamic field Description
- Select Field Type

Reference

The following table lists the Create Dynamic Field: General Details page elements and their descriptions.

Table A–35 Create Dynamic Field: General Details Reference

Component	Type	Description
General	Workflow Marker	Will be filled during this step, displaying workflow step status.
Value	Workflow Marker	Should be blank during this step.
Review	Workflow Marker	Should be blank during this step.
Code	Textfield	Enter a unique and alphanumeric code.
Name	Textfield	Enter a short and meaningful name.
Description	Textfield	Enter a description. Optional.
Field Type	Drop-down	Select a field type. Either Text, List of Values, or Java Program.
Cancel	Button	Select to cancel dynamic field creation and return to the Dynamic Field: User Defined page.
Next	Button	Select after entering general details. Accesses the Create Dynamic Field: Field Value page.

A.36 Dynamic Field Detail

Use the Dynamic Field Detail page to enter and view dynamic field details.

Tasks

You can perform the following tasks on this page:

- View all dynamic field details.
- Change dynamic field name.
- Change dynamic field description.
- Change dynamic field field prompt.

Reference

The following table lists the Dynamic Field Detail page elements and their descriptions.

Table A–36 Dynamic Field Detail Reference

Component	Type	Description
Code	Read Only	Dynamic field code.
Name	Textfield	View or change dynamic field name.
Description	Textfield	View or change dynamic field description.
Field Prompt	Textfield	View or enter a new prompt value. This is used to prompt users to enter a field value when creating a proposal created from a template containing this dynamic field.
Type	Read Only	Dynamic field type. Either Text, LOV, or Java program.
Data Type	Drop-down	Data type. Either Character, Date, or Number.
Maximum Display Length	Read Only	Displays maximum display length for dynamic field.
Cancel	Button	Select to cancel any changes and return to the Dynamic Fields page.
Apply	Button	Select to apply changes.

A.37 Create (Text) Dynamic Field: Field Value

Use the Create (Text) Dynamic Field: Field Value page to enter text dynamic field values.

Tasks

You can perform the following tasks on this page:

- Enter field prompt
- Select Data Type
- Enter maximum length for Character type text dynamic fields

Reference

The following table lists the Create (Text) Dynamic Field: Field Value page elements and their descriptions.

Table A–37 Create (Text) Dynamic Field: Field Value Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Value	Workflow Marker	Will be filled during this step, displaying workflow step status.
Review	Workflow Marker	Should be blank during this step.
Tip	Tip text	Instructional text for field value data.
Field Prompt	Textfield	Enter a prompt value. This is used to prompt users to enter a field value when creating a proposal created from a template containing this dynamic field.
Data Type	Drop-down	Select a data type. Either Character, Date, or Number.
Maximum Display Length	Textfield	Enter a maximum display length only if your data type is Character. For more than 50 characters, a multi-line text box will be displayed to users

A.38 Create (Text) Dynamic Field: Review

Use the Create (Text) Dynamic Field: Review page to review data entered when creating text dynamic fields.

Tasks

You can perform the following tasks on this page:

- Review text dynamic field data entered during the creation process
- Create text dynamic fields

Reference

The following table lists the Create (Text) Dynamic Field: Review page elements and their descriptions.

Table A–38 Create (Text) Dynamic Field: Review Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Value	Workflow Marker	Should be blank during this step.
Review	Workflow Marker	Will be filled during this step, displaying workflow step status.
Tip	Tip text	Instructional text for reviewing process.
Code	Read Only	Dynamic field code.
Name	Read Only	Dynamic field name.
Description	Read Only	Dynamic field description.
Field Type	Read Only	Field type.
Field Prompt	Read Only	Field prompt that users will see.
Data Type	Read Only	Data type.
Maximum Display Length	Read Only	Maximum display length.

A.39 Create (Drop Down) Dynamic Field: Field Value

Use the Create (Drop Down) Dynamic Field: Field Value page to enter drop down field values.

Tasks

You can perform the following tasks on this page:

- Enter drop down field values
- Delete drop down field values

Reference

The following table lists the Create (Drop Down) Dynamic Field: Field Value page elements and their descriptions.

Table A–39 Create (Drop Down) Dynamic Field: Field Value Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Value	Workflow Marker	Will be filled during this step, displaying workflow step status.
Review	Workflow Marker	Should be blank during this step.
Field Prompt	Textfield	Enter a field prompt value. This will be used as a user prompt for this dynamic field
Dynamic Field Values	Section	Section listing dynamic field values in table format.
Drop Down Display Value	Textfield	Enter a value for the drop down display.
Delete	Icon	Select to delete the value.
Add Row	Button	Select to add rows to the table.
Cancel	Button	Select to cancel and return to the Dynamic Field: User Defined page.
Back	Button	Select to return to the Create Dynamic Field: General page.
Next	Button	Select to access the Create Dynamic Field: Review page.

A.40 Create (Drop Down) Dynamic Field: Review

Use the Create (Drop Down) Dynamic Field: Review page to review data entered during the drop down dynamic field creation process.

Tasks

You can perform the following tasks on this page:

- Review drop down dynamic field values entered
- Create drop down dynamic fields

Reference

The following table lists the Create (Drop Down) Dynamic Field: Review page elements and their descriptions.

Table A–40 Create (Drop Down) Dynamic Field: Review Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Value	Workflow Marker	Should be blank during this step.
Review	Workflow Marker	Will be filled during this step, displaying workflow step status.
Tip	Tip text	Instructional text for review process.
Code	Read Only	Dynamic field code.
Name	Read Only	Dynamic field name.
Description	Read Only	Dynamic field description.
Field Type	Read Only	Field type.
Field Prompt	Read Only	Field prompt. This is what users will see when prompted to enter a value for this dynamic field.
Dynamic Field Values	Section	Section listing drop down display value in table format.
Drop Down Display Value	Read Only	Drop down display value.

Component	Type	Description
Cancel	Button	Select to cancel and return to the Dynamic Fields: User Defined page.
Back	Button	Select to return to the Create Dynamic Field: Field Value page.
Finish	Button	Select to create the dynamic field and return to the Dynamic Fields: User Defined page.

A.41 Create (Java Program) Dynamic Field: Field Value

Use the Create (Java Program) Dynamic Field: Field Value page to enter a Java program name as a dynamic field value.

Tasks

You can perform the following task on this page:

- Enter a Java program name as a dynamic field value.

Reference

The following table lists the Create (Java Program) Dynamic Field: Field Value page elements and their descriptions.

Table A–41 Create (Java Program) Dynamic Field: Field Value Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Value	Workflow Marker	Will be filled during this step, displaying workflow step status.
Review	Workflow Marker	Should be blank during this step.
Tip	Tip text	Instructional text for entering field value.
Program Name	Textfield	Enter valid Java program name.
Cancel	Button	Select to cancel and return to the Dynamic Fields: User Defined page.
Back	Button	Select to return to the Create Dynamic Field: General page.

Component	Type	Description
Next	Button	Select after entering program name to access the Create Dynamic Field: Review page.

A.42 Create (Java Program) Dynamic Field: Review

Use the Create (Java Program) Dynamic Field: Review page to review data entered during the java program dynamic field creation process.

Tasks

You can perform the following task on this page:

- Review data entered during the java program dynamic field creation process

Reference

The following table lists the Create (Java Program) Dynamic Field: Review page elements and their descriptions.

Table A–42 Create (Java Program) Dynamic FIeld: Review Reference

Component	Type	Description
General	Workflow Marker	Should be blank during this step.
Value	Workflow Marker	Should be blank during this step.
Review	Workflow Marker	Will be filled during this step, displaying workflow step status.
Code	Read Only	Dynamic field code.
Name	Read Only	Dynamic field name.
Description	Read Only	Dynamic field description.
Field Type	Read Only	Dynamic field field type. Should read: Java Program.
Package	Read Only	Java program name.
Cancel	Button	Select to cancel the dynamic field creation process.
Back	Button	Select to access the Create (Java) Dynamic Field Value page.
Finish	Button	Select to finish the create dynamic field process.

A.43 Dynamic Fields: Quote

Use the Dynamic Fields: Quote page to view quote dynamic fields.

Tasks

You can perform the following tasks on this page:

- View quote dynamic fields Groups
- View quote dynamic fields Names
- View quote dynamic fields Descriptions
- View quote dynamic fields RTF displays

Reference

The following table lists the Dynamic Fields: Quote page elements and their descriptions.

Table A–43 Dynamic Fields: Quote Reference

Component	Type	Description
Group	Read Only	Displays quote dynamic field group.
Code	Read Only	Displays quote dynamic field code.
Name	Read Only	Displays quote dynamic field name.
Description	Read Only	Displays quote dynamic field description.
RTF Display	Read Only	Display RTF file display for dynamic field.
Previous	Link	Select to see previous page. Enabled only if there is more than one page display and user is not on the first page display.
Next	Link	Select to access next page display. Enabled only if there is more than one page display and user is on a page that precedes another page display.

A.44 Dynamic Fields: Proposal

Use the Dynamic Fields: Proposal page to view proposal dynamic fields.

Tasks

You can perform the following tasks on this page:

- View proposal dynamic fields Groups
- View proposal dynamic fields Names
- View proposal dynamic fields Descriptions
- View proposal dynamic fields RTF displays

Reference

The following table lists the Dynamic Fields: Proposal page elements and their descriptions.

Table A–44 Dynamic Fields: Proposal Reference

Component	Type	Description
Group	Read Only	Displays proposal dynamic field group.
Code	Read Only	Displays proposal dynamic field code.
Name	Read Only	Displays proposal dynamic field name.
Description	Read Only	Displays proposal dynamic field description.
RTF Display	Read Only	Display RTF file display for dynamic field.
Previous	Link	Select to see previous page. Enabled only if there is more than one page display and user is not on the first page display.
Next	Link	Select to access next page display. Enabled only if there is more than one page display and user is on a page that precedes another page display.

A.45 Template Category

Use the Template Category page to view template category details and to create template categories.

Tasks

You can perform the following tasks on this page:

- View Template Category details
- Create Template Categories
- Delete Template Categories

Reference

The following table lists the Template Category page elements and their descriptions.

Table A–45 Create Template Category Reference

Component	Type	Description
Create Template Category	Button	Accesses the Create Template Category page.
Code	Template Category Code/Link	Displays template category code as linked text. Accesses the Template Category: General page.
Name	Read Only	Template category name.
Description	Read Only	Template category description.
Last Updated By	Read Only	Name of user who last updated the template category.
In Use	Check gif	Displays a checkmark is template category is in use. Otherwise blank.
Delete	Icon	Select to delete the template category. Enabled only if template category is not in use.

A.46 Create Template Category Page

Use the Create Template Category page to create template categories.

Tasks

You can perform the following tasks on this page:

- Enter template category Code
- Enter template category Name
- Enter template category Description

Reference

The following table lists the Create Template Category page elements and their descriptions.

Table A–46 Create Template Category Reference

Component	Type	Description
Code	Textfield	Enter a unique and alphanumeric code for the template category.
Name	Textfield	Enter a name for the template category.
Description	Textfield	Enter a description for the template category. Optional.
Cancel	Button	Select to cancel template category creation and return to the Template Category page.
Apply	Button	Select to create template category and return to the Template Category page. If template category is created successfully, a confirmation message appears, otherwise you receive an error message.

A.47 Template Category: General

Use the Template Category: General page to view and modify template category information.

Tasks

You can perform the following tasks on this page:

- View template category Code
- View and edit template category Name
- View and edit template category Description

Reference

The following table lists the Template Category: General page elements and their descriptions.

Table A–47 Template Category: General Reference

Component	Type	Description
Code	Read Only	Template Category code.
Name	Textfield	Template Category name. Editable.
Description	Textfield	Template Category description. Editable.
Delete	Button	Select to delete the Template Category. Enabled only if category is not in use.

Component	Type	Description
Cancel	Button	Select to cancel any changes made and return to the Templates page.
Apply	Button	Select after apply any changes made to name and/or description.

This appendix describes each window or page in the application including tasks you can perform and an explanation of the components. Sections in this appendix include:

A.48

B

Seed Data

This appendix contains information about seeded data in Oracle Proposals.

Sections in this appendix include:

- Seeded Data
- Seeded Dynamic Fields
  - Proposal Dynamic Fields - General
  - Proposal Dynamic Fields - Customer
  - Proposal Dynamic Fields - Sales Representative
  - Quote Dynamic Fields - Header: General
  - Quote Dynamic Fields - Header: Customer
  - Quote Dynamic Fields - Header: Pricing
  - Quote Dynamic Fields - Header: Contract
  - Quote Dynamic Fields - Header: Payment
  - Quote Dynamic Fields - Lines: General
  - Quote Dynamic Fields - Lines: Pricing
  - Structure Dynamic Fields

B.1 Seeded Data

The seeded data in Oracle Proposals allows users to leverage out of the box attributes and predefined parameters. Oracle Proposals can accommodate additional attributes to fit your business processes. The following is a comprehensive list of the seeded data currently included in the application.

B.2 Seeded Dynamic Fields

Dynamic fields that get their value from a database object are pre-seeded into the application. Sales administrators can use these dynamic fields in their component content, but are not allowed to change them.

B.2.1 Proposal Dynamic Fields - General

This table lists the Proposal General seeded dynamic fields.

Table B–1 Proposal Dynamic Fields - General

Dynamic field Name	Table	Table Column	Comment
Proposal Name	PRP_PROPOSALS	PROPOSAL_NAME	**Field Code**: PRP001 **RTF Display**: <@PRP001:Proposal Name@>
Due Date	PRP_PROPOSALS	DUE_DATE	**Field Code**: PRP003 **RTF Display**: <@PRP003:Proposal Due Date@>
Proposal Version	PRP_PROPOSALS	Version of the proposal being generated (Latest version plus one)	**Field Code**: PRP011 **RTF Display**: <@PRP011:Proposal Version@>

B.2.2 Proposal Dynamic Fields - Customer

The following table lists the Proposal - Customer seeded dynamic fields.

Table B–2 Proposal Dynamic Fields - Customer

Dynamic field Name	Table	Table Column	Comment
Customer Name	HZ_ PARTIES	PARTY_NAME (for organization) or PERSON_FIRST_NAME, PERSON_MIDDLE_ NAME, PERSON_LAST_ NAME (for people)	FK to HZ_PARTIES: This column can have either person, or organization. For organization, use Party Name. For person, use concatenation of first, middle, last, and suffix. **Field Code**: PRP006 **RTF Display**: <@PRP006:Customer Name@>
Contact Name	HZ_ PARTIES	PERSON_FIRST_NAME, PERSON_MIDDLE_ NAME, PERSON_LAST_ NAME	FK from PRO_PROPOSALS to HZ_PARTIES **Field Code**: PRP007 **RTF Display**:<@PRP007:Contact Name@>
Contact Title	HZ_ PARTIES	PERSON_TITLE	FK from PRO_PROPOSALS to HZ_PARTIES **Field Code**: PRP008 **RTF Display**:<@PRP008:Contact Title@>
Contact Phone Number	HZ_ CONTACT_ POINTS	PHONE_COUNTRY_ CODE, PHONE_AREA_ CODE, PHONE_ NUMBER, PHONE_ EXTENSION	FK from PRO_PROPOSALS to HZ_PARTIES; need to link to contact points and find the primary (PRIMARY_FLAG) phone number for that specific person. **Field Code**: PRP009 **RTF Display**: <@PRP009: Contact Phone Number@>

Dynamic field Name	Table	Table Column	Comment
Customer Email Address	HZ_ PARTIES	EMAIL_ADDRESS	FK from PRO_PROPOSALS to HZ_PARTIES; need to link to contact points and find the primary (PRIMARY_FLAG) phone number for that specific person. **Field Code**: PRP010 **RTF Display**:<@PRP010:Customer Email@>

B.2.3 Proposal Dynamic Fields - Sales Representative

The following table lists all the Proposal - Sales Representative seeded dynamic fields.

Table B–3 Proposal Dynamic Fields - Sales Representative

Dynamic field Name	Table	Comment
Sales Rep Name	JTF_RS_RESOURCES or HR Employee table	Based on whether the user is an employee or resource, name should came from the appropriate table. **Field Code**: PRP012 **RTF Display**:<@PRP012:Sales Rep Name@> Priority 1
Sales Rep Phone Number	JTF_RS_RESOURCES or HR Employee table	Based on whether the user is an employee or resource, name should came from the appropriate table. **Field Code**: PRP013 **RTF Display**:<@PRP013:Sales Rep Phone Number@> Priority 1

Table B–3 Proposal Dynamic Fields - Sales Representative

Dynamic field Name	Table	Comment
Sales Rep Fax Number	JTF_RS_RESOURCES or HR Employee table	Based on whether the user is an employee or resource, name should came from the appropriate table. **Field Code**: PRP014 **RTF Display**:<@PRP014:Sales Rep Fax Number@> Priority 1
Sales Rep Email	JTF_RS_RESOURCES or HR Employee table	Based on whether the user is an employee or resource, name should came from the appropriate table. **Field Code**: PRP015 **RTF Display**:<@PRP015:Sales Rep Email@> Priority 1
Sales Rep Address Line 1	JTF_RS_RESOURCES or HR Employee table	FK to HZ_party_sites and hz_locations for the main address. **Field Code**: PRP016 **RTF Display**:<@PRP016:Sales Rep Address Line 1@> Priority 1
Sales Rep Address Line 2	JTF_RS_RESOURCES or HR Employee table	FK to HZ_party_sites and hz_locations for the main address. **Field Code**: PRP017 **RTF Display**:<@PRP017:Sales Rep Address Line 2@> Priority 1
Sales Rep City	JTF_RS_RESOURCES or HR Employee table	FK to HZ_party_sites and hz_locations for the main address. **Field Code**: PRP018 **RTF Display**:<@PRP018:Sales Rep City@> Priority 1

Table B–3 Proposal Dynamic Fields - Sales Representative

Dynamic field Name	Table	Comment
Sales Rep State	JTF_RS_RESOURCES or HR Employee table	FK to HZ_party_sites and hz_ locations for the main address. **Field Code**: PRP019 **RTF Display**:<@PRP019:Sales Rep State@> Priority 1
Sales Rep ZIP	JTF_RS_RESOURCES or HR Employee table	FK to HZ_party_sites and hz_ locations for the main address. **Field Code**: PRP020 **RTF Display**:<@PRP020:Sales Rep ZIP@> Priority 1
Sales Rep County	JTF_RS_RESOURCES or HR Employee table	FK to HZ_party_sites and hz_ locations for the main address. **Field Code**: PRP021 **RTF Display**:<@PRP021:Sales Rep County@> Priority 1
Sales Rep Province	JTF_RS_RESOURCES or HR Employee table	FK to HZ_party_sites and hz_ locations for the main address. **Field Code**: PRP022 **RTF Display**:<@PRP022:Sales Rep Province@> Priority 1
Sales Rep Country	JTF_RS_RESOURCES or HR Employee table	FK to HZ_party_sites and hz_ locations for the main address. **Field Code**: PRP023 **RTF Display**:<@PRP023:Sales Rep Country@> Priority 1

Table B–3 Proposal Dynamic Fields - Sales Representative

Dynamic field Name	Table	Comment
Sales Rep Job Title	JTF_RS_RESOURCES or HR Employee table	Based on whether the user is an employee or resource, name should came from the appropriate table. **Field Code**: PRP024 **RTF Display**:<@PRP024:Sales Rep Job Title@> Priority 1

B.2.4 Quote Dynamic Fields - Header: General

This table list the Quote Dynamic Fields - Header: General seeded dynamic fields.

Table B–4 Quote Dynamic Fields - Header: General

Dynamic field Name	Table	Table Column	Comment
Quote Name	ASO_QUOTE_ HEADERS_ALL	QUOTE_NAME	**Field Code**: PRPQOT001 **RTF Display**:<@PRPQOT001:Quote Name Code@> Priority 1
Quote Number	ASO_QUOTE_ HEADERS_ALL	QUOTE_ NUMBER	**Field Code**: PRPQOT002 **RTF Display**:<@PRPQOT002:Quote Number@> Priority 1
Quote Version	ASO_QUOTE_ HEADERS_ALL	QUOTE_ VERSION	**Field Code**:PRPQOT003 **RTF Display**:<@PRPQOT003:Quote Version@> Priority 1
Expiration Date	ASO_QUOTE_ HEADERS_ALL	QUOTE_ EXPIRATION_ DATE	**Field Code**:PRPQOT004 **RTF Display**:<@PRPQOT004:Expiration Date@> Priority 1

Table B–4 Quote Dynamic Fields - Header: General

Dynamic field Name	Table	Table Column	Comment
Campaign Name	AMS_ CAMPAIGNS_ ALL_TL	CAMPAIGN_ NAME	FK from ASO_QUOTE_HEADERS: either marketing_source_code_id (campaign that got applied to this quote) or orig_mktg_source_code_ id (campaign that the quote originated from); if both filled marketing_ source_code_id takes precedence Use the proposal language to filter the campaign name. **Field Code**:PRPQOT005 **RTF Display**:<@PRPQOT005:Campaign Name @> Priority 1
Quote Promotion Code	ASO_PRICE_ ATTRIBUTES	PRICING_ ATTRIBUTE1	There can be multiple codes applied to a quote. Requires a repeater block. **Field Code**: PRPQOT006 **RTF Display**:<@PRPQOT006:Quote Promotion Code@> Priority 1
Quote Promotion Name	ASO_PRICE_ ATTRIBUTES	PRICING_ ATTRIBUTE1	There can be multiple codes applied to a quote. Requires a repeater block. **Field Code**: PRPQOT007 **RTF Display**:<@PRPQOT007:Quote Promotion Name@> Priority 1
Status	ASO_QUOTE_ STATUSES_TL	MEANING	FK from ASO_QUOTE_ HEADERS:quote_status_id **Field Code**: PRPQOT054 **RTF Display**: <@PRPQOT054:Status@> Priority 1

B.2.5 Quote Dynamic Fields - Header: Customer

This table lists the seeded Quote Header: Customer dynamic fields.

Table B–5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Sold to Cust Name	HZ_PARTIES	PARTY_NAME (for organization) or PERSON_FIRST_NAME PERSON_MIDDLE_NAME PERSON_LAST_NAME (for people)	FK from ASO_QUOTE_HEADERS: party_id. This column can have either person, organization, or relationship. For organization, use Party Name. For person, use concatenation of first, middle, last and suffix. For relationship, use the party name of the subject. **Field Code**:PRPQOT008 **RTF Display**: <@PRPQOT008:Sold to Cust Name@> Priority 1
Sold to Cust Acct Number	HZ_CUST_ACCOUNTS	ACCOUNT_NUMBER	FK from ASO_QUOTE_HEADERS: cust_account_id **Field Code**: PRPQOT009 **RTF Display**:<@PRPQOT009:Sold to Cust Acct Number@> Priority 1
Sold to Contact Name	HZ_PARTIES	PERSON_FIRST_NAME PERSON_MIDDLE_NAME PERSON_LAST_NAME PERSON_NAME_SUFFIX	FK from ASO_QUOTE_HEADERS: ORG_CONTACT_ID Does not exist if the customer if a party of type person. **Field Code**:PRPQOT010 **RTF Display**: <@PRPQOT010:Sold to Contact Name@> Priority 1

Table B–5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Sold to Contact Title	HZ_PARTIES	PERSON_TITLE	FK from ASO_QUOTE_ HEADERS: org_contact_id **Field Code**:Q0T011 **RTF Display**: <@PRPQOT011:Sold to Contact Title@> Priority 1
Sold to Cust Addressee	HZ_PARTY_SITES	ADDRESSEE	FK from ASO_QUOTE_ HEADERS:sold_to_party_id to HZ_PARTY_SITES **Field Code**:PRPQOT012 **RTF Display**:<@PRPQOT012:Sold to Cust Addressee@> Priority 1
Sold to Cust Address Line 1	HZ_LOCATIONS	ADDRESS 1	FK from ASO_QUOTE_ HEADERS: sold_to_party_id to HZ_PARTY_SITES and location_id to HZ_ LOCATIONS **Field Code**:PRPQOT013 **RTF Display**:<@PRPQOT013:Sold to Cust Address Line 1@> Priority 1
Sold to Cust Address Line 2	HZ_LOCATIONS	ADDRESS 2	FK from ASO_QUOTE_ HEADERS: sold_to_party_id to HZ_PARTY_SITES and location_id to HZ_ LOCATIONS **Field Code**:PRPQOT014 **RTF Display**:<@PRPQOT014:Sold to Cust Address Line 2@> Priority 1

Table B–5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Sold to Cust City	HZ_LOCATIONS	CITY	FK from ASO_QUOTE_ HEADERS: sold_to_party_ site_id to HZ_PARTY_SITES and location_id to HZ_ LOCATIONS **Field Code**:PRPQOT015 **RTF Display**:<@PRPQOT015:Sold to Cust City@> Priority 1
Sold to Cust State	HZ_LOCATIONS	STATE	FK from ASO_QUOTE_ HEADERS: sold_to_party_ site_id to HZ_PARTY_SITES and location_id to HZ_ LOCATIONS **Field Code**:PRPQOT016 **RTF Display**:<@PRPQOT016:Sold to Cust State@> Priority 1
Sold to Cust ZIP	HZ_LOCATIONS	POSTAL_CODE	FK from ASO_QUOTE_ HEADERS: sold_to_party_ site_id to HZ_PARTY_SITES and location_id to HZ_ LOCATIONS **Field Code**:PRPQOT017 **RTF Display**:<@PRPQOT017:Sold to Cust ZIP@> Priority 1

Table B–5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Sold to Cust County	HZ_LOCATIONS	COUNTY	FK from ASO_QUOTE_ HEADERS: sold_to_party_ site_id to HZ_PARTY_SITES and location_id to HZ_ LOCATIONS **Field Code**:PRPQOT018 **RTF Display**:<@PRPQOT018:Sold to Cust County@> Priority 1
Sold to Cust Province	HZ_LOCATIONS	PROVINCE	FK from ASO_QUOTE_ HEADERS: sold_to_party_ site_id to HZ_PARTY_SITES and location_id to HZ_ LOCATIONS **Field Code**:PRPQOT019 **RTF Display**:<@PRPQOT019:Sold to Cust Province@> Priority 1
Sold to Cust Country	HZ_LOCATIONS	COUNTRY	FK from ASO_QUOTE_ HEADERS: sold_to_party_ site_id to HZ_PARTY_SITES and location_id to HZ_ LOCATIONS **Field Code**:PRPQOT020 **RTF Display**:<@PRPQOT020:Sold to Cust Country@> Priority 1

Table B–5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Sold to Contact Phone	HZ_CONTACT_POINTS	PHONE_COUNTRY_CODE PHONE_AREA_CODE PHONE_NUMBER PHONE_EXTENSION	FK from ASO_QUOTE_HEADERS: org_contact_id to HZ_PARTIES; need to link to contact points and find the primary (PRIMARY_FLAG) phone number for that specific person. **Field Code**:PRPQOT021 **RTF Display**:<@PRPQOT021:Sold to Contact Phone@>
Sold to Cust Email	HZ_PARTIES	EMAIL_ADDRESS	FK from ASO_QUOTE_HEADERS: org_contact_id to HZ_PARTIES **Field Code**:PRPQOT022 **RTF Display**:<@PRPQOT022:Sold to Cust Email@> Priority 1

B.2.6 Quote Dynamic Fields - Header: Pricing

This table lists the Quote Header: Pricing seeded dynamic fields.

Table B–6 Quote Header: Pricing

Dynamic field Name	Table	Table Column	Comment
Price List Name	QP_LIST_HEADERS_TL	NAME	FK from ASO_QUOTE_HEADERS: price_list_id **Field Code**: PRPQOT056 **RTF Display**:<@PRPQOT056:Price List Name@> Priority 2

Table B–6 Quote Header: Pricing

Dynamic field Name	Table	Table Column	Comment
Currency Code	ASO_QUOTE_HEADERS	CURRENCY_CODE	**Field Code**: PRPQOT023 **RTF Display**: <@PRPQOT023:Currency Code@> Priority 1
Total List Price	ASO_QUOTE_HEADERS	TOTAL_LIST_PRICE	**Field Code**:PRPQOT024 **RTF Display**:<@PRPQOT024:Total List Price@> Priority 1
Total Adjustment Amount	ASO_QUOTE_HEADERS	TOTAL_ADJUSTED_AMOUNT	Can be either positive or negative amount. All adjustment types except FREIGHTS AND CHARGES. **Field Code**:PRPQOT025 **RTF Display**:<@PRPQOT025:Total Adjustment Amount@> Priority 1
Total Adjustment Percent	ASO_QUOTE_HEADERS	TOTAL_ADJUSTMENT_PERCENT	All adjustment types except FREIGHTS AND CHARGES. **Field Code**:PRPQOT026 **RTF Display**:<@PRPQOT026:Total Adjustment Percent@> Priority 1
Total Selling Price	Calculated	TOTAL_LIST_PRICE – TOTAL_ADJUSTED_ADMOUNT	Reflects a total of list price – adjustments **Field Code**:PRPQOT027 **RTF Display**:<@PRPQOT027:Total Selling Price@> Priority 1

Table B–6 Quote Header: Pricing

Dynamic field Name	Table	Table Column	Comment
Total Tax Amount	ASO_QUOTE_ HEADERS	TOTAL_TAX	**Field Code**:PRPQOT028 **RTF Display**:<@PRPQOT028:Total Tax Amount@> Priority 1
Total Charges	ASO_QUOTE_ HEADERS	TOTAL_ SHIPPING_ CHARGE	**Field Code**:PRPQOT029 **RTF Display**:<@PRPQOT029:Total Charges@> Priority 1
Total Quote Price	ASO_QUOTE_ HEADERS	TOTAL_QUOTE_ PRICE	Total List Price. Total adjusted amount plus total tax and total shipping charge. **Field Code**:PRPQOT030 **RTF Display**:<@PRPQOT030:Total Quote Price@> Priority 1

B.2.7 Quote Dynamic Fields - Header: Contract

This table lists the Quote Header - Contract seeded dynamic fields.

Table B–7 Quote Header - Contract

Dynamic field Name	Table	Table Column	Comment
Contract Number	OKC_K_ HEADERS_B	CONTRACT_NUMBER OBJECT_VERSION_ NUMBER	FK from ASO_QUOTE_HEADERS: contract_id **Field Code**:PRPQOT059 **RTF Display**:<@PRPQOT059:Contract Number@> Priority 2

Table B–7 Quote Header - Contract

Dynamic field Name	Table	Table Column	Comment
Contract Section	OKC_K_HEADERS_B	CONTRACT_SECTION	FK from ASO_QUOTE_HEADERS: take Ts&Cs from contract_id; if not filled take Ts&Cs from contract_template_id (standard Ts&Cs) **Field Code**:PRPQOT031 **RTF Display**:<@PRPQOT031:Contract Section@> Priority 1
Contract Article	OKC_K_HEADERS_B	CONTRACT_ARTICLE	**Field Code**:PRPQOT032 **RTF Display**:<@PRPQOT032:Contract Article@> Priority 1
Contract Standard Text	OKC_K_HEADERS_B	CONTRACT_STANDARD_TEXT	**Field Code**: PRPQOT033 **RTF Display**:<@PRPQOT033:Contract Standard Text@> Priority 1
Contract Non Standard Text	OKC_K_HEADERS_B	CONTRACT_NON_STANDARD_TEXT	**Field Code**: PRPQOT034 **RTF Display**:<@PRPQOT034:Contract Non Standard Text@> Priority 1

B.2.8 Quote Dynamic Fields - Header: Payment

This table lists the Quote Header: Payment seeded dynamic fields.

Table B–8 Quote Header - Payment

Dynamic field Name	Table	Table Column	Comment
Payment Terms	ASO_ PAYMENTS	PAYMENT_TERM_ID	**Field Code**:PRPQOT035 **RTF Display**: <@PRPQOT035:Payment Terms@> Priority 1
Payment Type	ASO_ PAYMENTS	PAYMENT_TYPE_ CODE	**Field Code**:PRPQOT036 **RTF Display**: <@PRPQOT036:Payment Type@> Priority 1
PO Number	ASO_ PAYMENTS	CUST_PO_NUMBER	**Field Code**:PRPQOT037 **RTF Display**:<@PRPQOT037:PO Number@> Priority 1
Check Number	ASO_ PAYMENTS	PAYMENT_REF_ NUMBER	Store check number. **Field Code**:PRPQOT038 **RTF Display**:<@PRPQOT038:Check Number@> Priority 1
Credit Card Type	ASO_ PAYMENTS	CREDIT_CARD_ CODE	**Field Code**:PRPQOT039 **RTF Display**:<@PRPQOT039:Credit Card Type@> Priority 1
Credit Card Number	ASO_ PAYMENTS	CREDIT_CARD_ NUMBER	**Field Code**:PRPQOT040 **RTF Display**:<@PRPQOT040:Credit Card Number@> Priority 1

Table B–8 Quote Header - Payment

Dynamic field Name	Table	Table Column	Comment
Credit Card Holder Name	ASO_ PAYMENTS	CREDIT_CARD_ HOLDER_NAME	**Field Code**:PRPQOT041 **RTF Display**:<@PRPQOT041:Credit Card Holder Name@> Priority 1
Credit Card Expiration	ASO_ PAYMENTS	CREDIT_CARD_ EXPIRATION_DATE	**Field Code**:PRPQOT042 **RTF Display**:<@PRPQOT042:Credit Card Expiration@> Priority 1

B.2.9 Quote Dynamic Fields - Lines: General

This table lists the Quote Dynamic Fields - Lines: General seeded dynamic fields.

Table B–9 Quote Lines: General

Dynamic field Name	Table	Table Column	Comment
Item Number	MTL_SYSTEM_ ITEMS	ITEM_NUMBER	FK from ASO_QUOTE_ LINES_ALL: inventory_ item_id **Field Code**: PRPQOT043 **RTF Display**: <@PRPQOT043:Item Number@> Priority 1
Product Description	MTL_SYSTEM_ ITEMS	PRODUCT_DESC	FK from ASO_QUOTE_ LINES_ALL: inventory_ item_id **Field Code**: PRPQOT044 **RTF Display**: <@PRPQOT044: Product Description@> Priority 1

Table B–9 Quote Lines: General

Dynamic field Name	Table	Table Column	Comment
Unit of Measure	ASO_QUOTE_ LINES_ALL	UOM_CODE	**Field Code**: PRPQOT045 **RTF Display**: <@PRPQOT045:Unit of Measure@> Priority 1
Line Quantity	ASO_QUOTE_ LINES_ALL	QUANTITY	**Field Code**: PRPQOT046 **RTF Display**: <@PRPQOT046:Line Quantity@> Priority 1
Line Type	ASO_QUOTE_ LINES_ALL	ORDER_LINE_TYPE_ ID	**Field Code**: PRPQOT047 **RTF Display**: <@PRPQOT047:Line Type@>

B.2.10 Quote Dynamic Fields - Lines: Pricing

This table lists the Quote Dynamic Fields - Lines: Pricing seeded dynamic fields.

Table B–10 Quote Lines: Pricing

Dynamic field Name	Table	Table Column	Comment
Line Unit List Price	ASO_QUOTE_ LINES_ALL	LINE_LIST_PRICE	**Field Code**: PRPQOT048 **RTF Display**: <@PRPQOT048:Line Unit List Price@> Priority 1

Table B–10 Quote Lines: Pricing

Dynamic field Name	Table	Table Column	Comment
Line Unit Adjustment Amount	ASO_QUOTE_LINES_ALL	LINE_ADJUSTMENT_AMOUNT	**Field Code**:PRPQOT049 **RTF Display**: <@PRPQOT049:Line Unit Adjustment Amount@> Priority 1
Line Unit Adjustment Percent	ASO_QUOTE_LINES_ALL	LINE_ADJUSTMENT_PERCENT	**Field Code**: PRPQOT050 **RTF Display**: <@PRPQOT050:Line Unit Adjustment Percent@> Priority 1
Line Total Selling Price	Calculated	LINE_QUOTE_PRICE*QTY	**Field Code**: PRPQOT052 **RTF Display**: <@PRPQOT052:Line Total Selling Price@> Priority 1
Line Unit Selling Price	ASO_QUOTE_LINES_ALL	LINE_QUOTE_PRICE	**Field Code**: PRPQOT051 **RTF Display**: <@PRPQOT051:Line Unit Selling Price@> Priority 1

B.2.11 Structure Dynamic Fields

These structure tokens allow users to designate the structure where multiple quotes, lines or any other data needs to be inserted into the document. These are only used for organizing quote-related information in RTF files.

This table lists the Structure Dynamic Fields.

Table B–11 Structure Dynamic Fields

Group	Entry Values	Field Name	Description
Quote Structure - Header	**Field Code**:PRPSTR001 **RTF Display**: <@PRPSTR001:Begin Quote@>	Begin Quote	Control structure to indicate quote beginning
Quote Structure - Header	**Field Code**:PRPSTR002 **RTF Display**: <@PRPSTR002:End Quote@>	End Quote	Control structure to indicate quote end
Quote Structure – Line	**Field Code**:PRPSTR003 **RTF Display**: <@PRPSTR001:Begin Quote Line@>	Begin Quote Line	Control structure to indicate quote line beginning
Quote Structure – Line	**Field Code**:PRPSTR004 **RTF Display**: <@PRPSTR004:End Quote Line@>	End Quote Line	Control structure to indicate quote line end
Quote Structure – Contract	**Field Code**:PRPSTR005 **RTF Display**: <@PRPSTR005:Begin Contract@>	Begin Contract	Control structure to indicate contract beginning
Quote Structure – Contract	**Field Code**:PRPSTR006 **RTF Display**: <@PRPSTR006:End Contract@>	End Contract	Control structure to indicate contract end
Quote Structure – Contract	**Field Code**:PRPSTR007 **RTF Display**: <@PRPSTR007:Begin Contract Article@>	Begin Contract Article	Control structure to indicate contract article beginning

Table B–11 Structure Dynamic Fields

Group	Entry Values	Field Name	Description
Quote Structure – Contract	**Field Code**:PRPSTR008 **RTF Display**: <@PRPSTR008:End Contract Article@>	End Contract Article	Control structure to indicate contract article end
Quote Structure – Pricing	**Field Code**:PRPSTR009 **RTF Display**: <@PRPSTR009:Begin Quote Header Promo Code@>	Begin Quote Header Promo Code	Control structure to indicate quote header promo code beginning
Quote Structure – Pricing	**Field Code**:PRPSTR010 **RTF Display**: <@PRPSTR010:End Quote Header Promo Code@>	End Quote Header Promo Code	Control structure to indicate quote header promo code end

C

Security in Oracle Proposals

This appendix contains scenarios demonstrating security in Oracle Proposals. Sections include:

C.1 Proposals Security Scenarios

Topics include:

- Scenario 1 - User is an FND USER (Invalid)
- Scenario 2 - User is an FND USER and a Resource (Valid)
- Accessing Proposals

C.1.1 Scenario 1 - User is an FND USER (Invalid)

User can log in. User's name is not known to Oracle Proposals since FND does not store name.

If Oracle Quoting is available, and security is turned ON, these types of users can add any valid quotes that are accessible to them.

If Oracle Quoting is available and security is turned OFF, these users can add any valid quote because all quotes are available to users.

C.1.2 Scenario 2 - User is an FND USER and a Resource (Valid)

User can log in. Users name is known to Oracle Proposals, and displays in the user interface.

If Oracle Quoting is available and security is turned ON, these users can add valid quotes that are accessible to them.

If quoting is available and security is turned OFF, these users can add any valid quote because all quotes are available to them.

If the user is **not** a resource, the following error message displays:

You do not have access to view or create proposals. Please contact your administrator to set up your user profile.

C.1.3 Accessing Proposals

Currently, users can only access those proposals they have created. However, there are two ways in which users can view proposals created by other users:

- Oracle Quoting users can see all proposals created from a quote in the Quoting application. This allows any Oracle Quoting user with access to a quote to view proposals they may not have created themselves. In such cases, Oracle Proposals should catch this error and display the message:

  You do not have access to this proposal.

- Users who type the proposal ID in the url. However, Oracle Proposals will validate when users try to modify a proposal.

D

Dynamic Field Structure in RTF Files

This appendix contains details, scenarios, and guidelines for dynamic field creation in RTF files. Topics include:

- RTF Representation of a Quote
- Example of a Quote in an RTF File
- Quote Related Dynamic Field Scenarios
- Control Structure Rules
- Warnings
- Common Errors

Users can add multiple quotes to a proposal. Also, a single quote can have multiple lines. To represent this variance generically in the RTF file, Oracle Proposals seeds Structure Dynamic Fields. These dynamic fields are identified by the prefix *PRPSTR* in the dynamic field code.

The structure tokens allow users to indicate structure where multiple quotes, lines or other information is expected. Structure tokens are applicable only for designing quote related information in an RTF file.

While quote related dynamic fields can be used outside of control structures, doing so does not allow the parser to repeat the information for all the quotes associated with the proposal. Any quote related dynamic field placed outside the control structure will be substituted using the primary quote in the proposal.

D.1 RTF Representation of a Quote

A quote can be logically represented using the control structure in an RTF file in the following way:

Begin quote

Begin quote line

(Quote line related dynamic fields inserted here)

End quote line

Begin promocode line

(Promotional code related dynamic fields inserted here)

End promocode line

Begin contract

Begin Contract article

(Contract related dynamic fields inserted here)

End contract article

End contract

End quote

This structure, when represented in the form of dynamic fields in an RTF file, should be:

`<@PRPSTR001:Begin Quote@>`

(Quote related dynamic fields are inserted here.)

<@PRPSTR003:Begin Quote Line@>

(Quote and quote line related dynamic fields inserted here.)

<@PRPSTR004:End Quote Line@>

<@PRPSTR005:Begin Contract@>

(Quote related dynamic fields inserted here.)

<@PRPSTR007:Begin Contract Article@>

(Quote and Contract related dynamic fields are inserted here)

<@PRPSTR008:End Contract Article@>

<@PRPSTR006:End Contract@>

<@PRPSTR009:Begin Promocode@>

(Quote and Promotional code related dynamic fields inserted here.)

<@PRPSTR010:End Promocode@>

<@PRPSTR002:End Quote@>

D.2 Example of a Quote in an RTF File

Consider the following example:

Proposal: Business Network Proposal. Quotes in the proposal equal 2.

Quote #1: (As the primary quote for the proposal)

Quote name: Simple Solution

Quote line 1= Laptop; Line selling Price = $2500

Quote line 2 = Desktop; Line selling Price = $2000

Quote #2:

Quote Name: Custom Solution

Quote line 1= Custom Laptop; Line Selling Price =$5000

Quote line 2 = Custom Desktop; Line Selling Price = $3500

D.3 Quote Related Dynamic Field Scenarios

D.3.1 Scenario 1: Quote Related Dynamic Field Without, or Outside of, the Control Structure

The following table outlines the RTF representation for a quote related dynamic field without, or outside of the control structure.

Table D–1 Scenario 1: Quote Related Dynamic Field Without, or Outside of the Control Structure

Quote: **<@PRPQOT001:Quote Name@>**	Proposal: **<PRP001:Proposal Name@>**
<@PRPQOT044:Product Description@>	*$<@PRPQOT052:Line Total Selling Price@>*

What to expect:

Because there are no structure tokens, the parser does not know what section is a quote or what needs to be repeated. When the parser encounters a quote dynamic field it uses the values from the primary quote (in this case *Simple Solution*) to substitute the quote name. For the product description and price, it selects the first line item from the quote.

With the above RTF representation in effect, the following output will be generated

The following table outlines the output for the RTF representation listed above.

.

Table D–2 Scenario 1: Output

Quote: **Simple Solution**	Proposal: **Business Network Proposal**
Laptop	*$2500*

D.3.2 Scenario 2: Quote Related Dynamic Fields Within the Quote Header Control Structure (But Without the Line Control Structure)

RTF representation:

<@PRPSTR001:Begin Quote@>

The following table outlines the RTF representation of quote related dynamic fields within the quote header control structure.

Table D–3 Scenario 2: Quote Related Dynamic Fields Within the Quote Header Control Structure

Quote: **<@PRPQOT001:Quote Name@>**	Proposal: **<PRP001:Proposal Name@>**
<@PRPQOT044:Product Description@>	*$<@PRPQOT052:Line Total Selling Price@>*

<@PRPSTR002:End Quote@>

Note the following changes between scenario 1 and 2: Scenario 1 did not have a begin and end quote header structure so Oracle Proposals used the primary quote information. In this case, the application knows that anything between PRPSTR001 and PRPSTR002 is a quote and needs to be repeated. Since there are two quotes on this proposal, this structure will be repeated twice – once for each quote. But since the structure needed to repeat quote line is not there, Proposals uses the first line item for each quote while generating this RTF file.

The following table outlines the output for the RTF file structure outlined above.

Table D–4 Scenario 2: Output

Quote: **Simple Solution**	Proposal: **Business Network Proposal**
Laptop	*$2500*
Quote: **Custom Solution**	Proposal: **Business Network Proposal**
Custom Laptop	*$5000*

D.3.3 Scenario 3: Quote Related Dynamic Fields Within the Quote Header and Line Control Structure

RTF representation:

<@PRPSTR001:Begin Quote@>

The following table outlines Scenario 3: Quote Related Dynamic Fields Within the Quote Header and Line Control Structure.

Table D–5 Scenario 3: Quote Related Dynamic Fields Within the Quote Header and Line Control Structure

Quote: **<@PRPQOT001:Quote Name@>**	Proposal: **<PRP001:Proposal Name@>** <PRPSTR003:Begin Quote Line@>
<@PRPQOT044:Product Description@>	*$<@PRPQOT052:Line Total Selling Price@>* <PRPSTR004:End Quote Line@>

<@PRPSTR002:End Quote@>

Note the following changes between scenario 2 and 3: Scenario 2 did not have a begin and end quote line structure so Oracle Proposals used the first quote line information for each quote. In this case, the application knows that anything between PRPSTR003 and PRPSTR004 is a quote line, and needs to be repeated for each line in the quote. Since there are two quote line for each quote on this proposal, this structure will be repeat twice for each quote.

The following table outlines the output for the above RTF file.

Table D–6 Scenario 3: Output

Quote: **Simple Solution**	Proposal: **Business Network Proposal**
Laptop	*$2500*
Desktop	*$2000*
Quote: **Custom Solution**	Proposal: **Business Network Proposal**
Custom Laptop	*$5000*
Custom Desktop	*$3500*

Note: The font size of the structure dynamic fields is irrelevant. Users can make these dynamic fields as small as they want in order to not take up much space and affect the formatting of the RTF file.

D.4 Control Structure Rules

The following rules must be followed:

Valid

All control structures for a quote should be **within** begin quote and end quote structure.

If a quote related dynamic field is placed outside of the control structure, the substituted value will be taken from the primary quote.

Invalid

Control structure for quote line, promotional code, and/or contract placed outside of begin quote and end quote structure are invalid.

Valid

Every Begin structure should have its corresponding End structure.

Invalid

Control structures should not overlap. For example, the following is invalid:

<begin quote line>

<begin promocode>

<end quote line>

<end promocode>

There should not be duplicate control structure within an existing one. For example:

<begin quote line>

<begin quote line>

<end quote line>

<end quote line>

Valid

Quote related dynamic fields can be placed anywhere within the begin quote and end quote structure.

If a promotional code dynamic field is placed outside <begin promocode> and <end promocode> structure, the first promotional code of the quote returned by the database will be used during generation.

Similarly if a pricing dynamic field is placed outside the <begin quote line> and <end quote line> structure, the first quote line of the quote returned by the database will be used during generation.

Valid

<Begin Contract Article> and <End Contract Article> structure fields can be used only within <Begin Contract> and <End Contract> structure

D.5 Warnings

The following are not supported during the merging process and will result in errors. Please note the following:

- **Page Setup that distinguishes Odd, Even and First pages in a document are not supported**.

  When documents are merged, there is no way to determine where these specially formatted pages will appear in the final document. Parameter definitions for these types of pages within the individual documents will be lost.

- **Only one section is allowed within a document**.

  RTF does not support nested sections. Documents set up to be merged as individual sections in the final document are logically mapped. Definition of parameters for sections within the individual documents will be lost.

- **Headers and Footers must be carefully implemented**.

  Headers and Footers set in an individual document will be carried forward to subsequent documents in the merged document, unless they are overwritten by Headers and Footers defined in the subsequent documents.

- **Drawings and Images must be anchored**.

  To preserve the exact position of a drawing in the merged document, it must be anchored.

- **Table of Contents styles not support**

  Table of Contents files throw errors during generation or during RTF file association with components - This happens because Oracle Proposals does not support components with RTF files that were created using standard Table of Content styles. You **cannot** include a table of contents as a component.

D.6 Common Errors

- Make sure that structure tags are the first tokens for quote tokens.
- There should not be any spaces between the token code and "<@" or ":"

For example:

<@PRP001:Proposal Name @> is valid

<@ PRP001:Proposal Name@> or <@PRP001 :Proposal Name@> or

< @PRP001:Proposal Name@> - all of them throw errors.

- If the RTF document begins with a token, many word processing applications copy it into the document title. If the entered token contains an error, the document title will repeat that error. Eventually, when users correct the error, the token in the document title is not corrected by the word processing program. The parser will still display an error.

- Certain characters are not valid file extensions and, if users try to download a file with an invalid extension, some operating systems create a system generated name for the file. This can cause other problems. Currently, a generated document picks up the name from the proposal name. This will be modified to replace all characters not valid in the operating system with a space.
- If the code has been corrupted during file upload, you will receive an error message. This error message may contain extra characters that do not reflect the actual character set in your RTF file. This error occurs because a particular style has been applied to part of the token. To resolve this issue, you can perform one of the following:
    - Delete the particular token and re-enter it.

      Or:
    - Select the whole token and apply its style.

Glossary

Component

Piece of standard content that might be included in a proposal template.

Component Code

Unique, non-transferable code for proposal components.

Component Content

Content that is referenced to the physical component content. Content that is the physical standard content (e.g. text, graphics, tables, etc.) that represents the proposal component.

Component Document

A component document references piece of standard content that might be included in a proposal template. Standard content can include any type of pre-defined text, tables, graphs, gifs, etc. that are in RTF format.

Component Order

Order in which the components are generated into the proposal output document.

CRM Object

CRM Object that is referenced by the specific proposal component. Used to determine which UI to draw from when providing sales proposal detail. An example of a CRM Object that can be used within a Proposal Component is a quote from Oracle

Quoting.

Document

An individual look-and-feel. Styles are created in Oracle Proposals by creating different RTF files and then associating these documents to individual components.

Dynamic Field

References to the dynamic fields used to generate the proposal output. Based on specific template chosen. Dynamic fields can either be seeded by application or created by users. Placeholder within a pre-defined piece of content that references a specific piece of information that gets substituted into the content during creation.

Dynamic Field Value

Value of dynamic field. Value that the user enters or chooses. Dynamic fields can either be seeded by application or created by users.

List of Values (LOV)

A list of valid values in a text field, from which users must choose.

Proposal

Customer presentable, customizable and manageable document. A proposal positions a product or service as a solution to a customer's business problem.

Proposal Due Date

Date on which proposal is due to the customer.

Proposal Name

Physical name of the proposal output file. At generation time, the name is composed of the proposal name concenated with the appropriate extension depending on the format of the output file.

Proposal Output

The physical file that gets created for a proposal as part of the generation process. There might be multiple version of proposal output files created during the life of a proposal. The physical proposal output is the object that gets shared with the customer.

Remarks

A remark, or long description, that is entered every time a new proposal output is uploaded.

RTF file

Rich Text Format file. RTF files are ASCII files with special commands to indicate formatting information. The final generated version of a single proposal document is in RTF format. Proposal component files are the physical standard content in RTF format representing the proposal component.

Standalone Proposal

A proposal that is generated using all original data, as opposed to a proposal created from a quote.

Status

Status of the proposal output file. Determines where in the proposal process the file was generated or uploaded. Values are Draft and Final.

Template

Pre-defined standard boilerplate document that users select to create a proposal for a customer. Contains components.

Template Category

Group or type of template.

Template List

A displayed list of templates. You must choose a template to create a proposal based on.

Version

Version of the proposal output file. Version number is automatically created every time a proposal is generated or uploaded.