

Oracle® Proposals

Implementation Guide

Release 11*i*

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Oracle Proposals Implementation Guide, Release 11i

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Primary Author: Claire Syn Tom

Contributing Authors: Bala Girisaballa, William Saylor, Sathiya Rajagopal, Farah Ahmed

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Oracle Proposals Implementation Guide, Release 11*i*

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Oracle 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.

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Preface

Welcome to the Oracle Proposals Implementation Guide, Release 11i.

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

The Oracle Proposals Implementation Guide contains the information you need to understand and use Oracle Proposals. This guide contains four chapters:

- [Chapter 1, "Introduction"](#) provides an overview of Oracle Proposals and describes its features.
- [Chapter 2, "Before You Begin"](#) provides an overview of what you need to have installed, implemented, and verified before implementing Oracle Proposals.
- [Chapter 3, "Implementation Overview"](#) lists the tasks necessary for implementing Oracle Proposals.

- [Chapter 4, "Implementation Tasks for Oracle Proposals"](#) lists the tasks for implementing Oracle Proposals.
- [Chapter 5, "Oracle Proposals Integrations"](#) explains Oracle Proposals integration with other Oracle products and third party integrations.
- In addition, the following appendices are included in this guide:
 - [Appendix A, "Oracle Proposals Profile Options"](#)
 - [Appendix B, "Permissions for Oracle Content Manager"](#)

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 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.

Other Information Sources

You can choose from many sources of information, including 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 11i versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation**- See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on *OracleMetaLink*.
- **About document** - Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on *OracleMetaLink*.

Related Guides

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

You can read the guides 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>.

Guides 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). 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.

Guides Related to This Product

Oracle Proposals User Guide

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

Oracle Content Management User Guide

This guide describes and explains the concepts and procedures that are helpful in using Oracle Content Management.

Oracle Content Management Implementation Guide

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

Oracle Trading Community Architecture Administration User Guide

This guide describes and explains the procedures needed for successful implementation and administration of Oracle Trading Community Architecture.

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 Oracle Quoting.

Oracle Field Sales 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 Oracle Sales products: Oracle Field Sales and Oracle TeleSales.

Oracle Field Sales User Guide

This guide describes and explains the concepts and procedures that are helpful in using Oracle Field Sales.

Oracle Telesales Implementation Guide

This guide contains the information needed to understand, implement, and use Oracle Telesales. It brings together all the information needed for successful implementation of Oracle TeleSales.

Oracle Telesales User Guide

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

Oracle Sales Implementation Guide

This guide contains the information needed to understand, implement, and use Oracle Sales. It brings together all the information needed for successful implementation of Oracle Sales.

Oracle Sales User Guide

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

Oracle Marketing Implementation Guide

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

Oracle Marketing User Guide

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

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 and the Oracle 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 guides and implementation guides.

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.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

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 and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in

the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

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 guide 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 Oracle *Metalink*

Oracle Applications Message Manual

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

Oracle Applications Framework Personalization Guide (Metalink Note # 268969.1)

Oracle Application has a layered architecture, where each layer encapsulates the maximum reusable set of features without creating dependencies on higher layers. Such architecture enhances reusability of functionality and makes possible global customizations. This manual describes how to customize Oracle Applications that are built on the OA Framework.

Oracle Applications Framework Developer's Guide (Metalink Note # 269138.1)

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface in the OA Framework

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Proposals and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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 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 Oracle server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink 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 OracleMetaLink, 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 OracleMetaLink 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 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.

Part I

Getting Started

This section contains the following chapters:

- [Chapter 1, "Introduction"](#)
- [Chapter 2, "Before You Begin"](#)

Introduction

This chapter provides information on the following topics:

- [Section 1.1, "Oracle's E-Business Suite"](#)
- [Section 1.2, "Oracle E-Business Suite 11.5.10 Release"](#)
- [Section 1.3, "Oracle Proposals Overview"](#)

1.1 Oracle's E-Business Suite

Oracle's E-Business Suite is a comprehensive web-based answer for business-to-business (B2B) and business-to-consumer (B2C) selling, marketing, analyzing, and servicing through the Internet. The Oracle E-Business Suite consists of both front-office Customer Relationship Management (CRM) applications and back-office Enterprise Resource Planning (ERP) applications. These applications automate marketing, sales, contracts, service, manufacturing, and supply chain processes, as well as financial operations, project management, human resources operations, and business intelligence systems.

1.1.1 E-Business Suite Applications

Customers can seamlessly share data from front-end applications (CRM) to backend applications (ERP) in the Oracle E-Business Suite. The applications leverage Oracle's [Common Application Architecture](#).

The [Customer Relationship Management \(CRM\)](#) applications encompass:

- Marketing suite
- Sales suite
- Contracts suite

- Service suite
- eCommerce suite

The [Enterprise Resource Planning \(ERP\)](#) applications include:

- Oracle Order Management
- Oracle Supply Chain Planning
- Oracle Manufacturing
- Oracle Financials
- Oracle Human Resources Management System

Customer Relationship Management (CRM)

Companies use Oracle's CRM suite of applications to acquire, maintain, and enhance customer relationships, by assisting companies with marketing automation, sales force automation, contracts management, customer service and support, and business intelligence, in a multi-channel environment.

- The **Marketing** suite provides campaign planning and execution, budget management, list creation, reporting, and analysis tools. Marketing professionals use the Oracle Marketing applications to drive quality leads to sales, to expand reach, and to maximize marketing effectiveness by using a comprehensive set of marketing automation, analysis, and multi-channel execution capabilities. The Marketing suite offers seamless integration with sales, service, and operations.
- The **Sales** suite provides integrated tools for all players in the sales process, including field salespeople, telesales agents, distributors and resellers, sales executives, and Internet customers.

Armed with up-to-the minute information regarding customers, leads and opportunities, as well as forecasts and compensation plans and projections, executives can proactively and effectively manage a sales force while providing the sales people with the information needed to close sales. Using this information, the field sales force, telesales teams, resellers, and web storefronts can collaborate in closing more business together as one sales team.

- The **Contracts** suite enables authoring, executing, and managing contracts, warranties and extended warranties, providing visibility to contract entitlements and the ability to proactively act upon contractual commitments. Whether a buyer or a seller, issuing contracts or receiving them, the Contracts suite automates the full contract life cycle.

- The **Service** suite manages service activities with the goals of profitability, employee productivity, and enhanced customer satisfaction by comprehensively addressing service and support activities from initial contact with the customer through issue resolution. Automating service efforts can potentially transform an area that has historically proven to be a cost center into a revenue generator.

This suite of applications provides customer support, field service, and depot repair functionality. In addition, Oracle Service offers complete visibility into spare parts availability, logistics, service billing, and customer contract entitlements. Oracle Customer Care provides full access to customer information from each touch point in the enterprise and to each customer care agent or other employees who interact with the customer. All of the Service products can be deployed across web, call center, and mobile field channels.

- The **eCommerce** suite of products aids in establishing profitable long-term relationships with customers through Internet availability, one-to-one marketing and personalized shopping experiences, as well as proactive support and self-service capabilities. Oracle eCommerce synchronizes all customer interactions and transactions by integrating web-based channels with traditional channels.

Enterprise Resource Planning (ERP)

Companies use the ERP applications to control their back-office operations. For example:

- **Oracle Order Management** applications feature advanced configurator functionality, global available to promise, flexible pricing support, efficient delivery, high volume transactions, and the flexibility to adapt to changing business conditions.
- **Oracle Supply Chain Planning** applications provide the tools required to optimize flow of material, cash, and information across the extended supply chain.
- **Oracle Manufacturing** applications support all styles of manufacturing - engineer-to-order, discrete, process, flow, lot based, and project based manufacturing.
- **Oracle Financials** provide solutions for strategic planning, accounting, treasury, project management, and travel management.

- **Oracle Human Resources Management System** is a comprehensive solution for managing a company's human resources, allowing organizations to attract, retain and develop critical skills and knowledge on a global basis.

Common Application Architecture

Oracle's Common Application Architecture includes functionality that supports both CRM and ERP applications. For example, Oracle's Trading Community Architecture (TCA), consists of a database schema and Application Programming Interfaces (APIs) that enable the modeling of complex business community relationships and the ability to enter business community data consistently throughout the enterprise. Because TCA is not hierarchical, Oracle applications can model complex B2B2C relationships and not to be limited to either a B2B or B2C implementation.

1.2 Oracle E-Business Suite 11.5.10 Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.10 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 Oracle *Metalink* for relevant product patches and documentation.

1.3 Oracle Proposals Overview

Oracle Proposals allows users to generate dynamic proposals using templates. With Oracle Proposals, businesses 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 sales representatives to work with customers by automating the proposal process

Oracle Proposals streamlines proposal creation by automating time- and resource-consuming tasks. Users 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.

Oracle Proposals also allows proposal administration through:

- Template management
- Dynamic field administration

Oracle Proposals is a part of the Oracle E-Business Suite, an integrated suite of enterprise applications designed to transform a traditional business into an e-business.

1.3.1 Oracle Proposals Features

Oracle Proposals includes the following features:

- Proposal Creation
- Quoting Integration
- Leads Integration
- Content Management Integration
- Campaign Schedule Integration
- Opportunity Integration
- Customer Integration
- Guided Proposal Content Building
- Proposal Document Generation
- E-Mail Delivery
- Proposal Views and Searches
- Proposal Templates
- Proposal Components for Standardized Content
- Dynamic Fields

Proposal Creation

Users can create a proposal from a quote, opportunity, or lead or for a customer. Users can also create a standalone proposal in which the user will provide the customer and contact name. Users select a master proposal template from a list of possible templates and can specify the proposal name, description, customer, and due date. From the opportunity, lead, and customer, the customer name will automatically be carried over along with a contact if one is available.

Quoting Integration

Users can create a proposal based on a quote in Oracle Quoting. When a proposal is created from a quote, relevant quote information is automatically pulled into the proposal.

Leads Integration

Oracle Proposals is integrated with **Leads** in Oracle Sales. This integration allows Oracle Proposals user in the Self-Service mode to create a proposal from a lead in Oracle Sales, where information from the lead is pulled into the proposal during the proposal creation process. If the lead is associated with a campaign schedule, the proposal template associated to the campaign schedule will automatically be used.

Content Management Integration

Oracle Proposals is now integrated with Oracle Content Manager (OCM). This integration allows Oracle Proposals administrators and users to store and reuse content when constructing their templates and proposals, respectively. Users can access files stored in either the OCM Folders or the OCM Library and add it to their proposal. Users can also store files from desktop to a proposal in an OCM folder. Administrators can store and reuse files in OCM for files. OCM integration is determined by the setting of a profile option that allows flexibility in the level of integration.

Campaign Schedule Integration

Oracle Proposals is also integrated with **Campaign Schedule** in Oracle Marketing. This integration allows association of a proposal template to a campaign schedule in Oracle Marketing.

Opportunity Integration

Oracle Proposals is integrated with **Opportunity** in Oracle Field Sales, Oracle Telesales, and Oracle Sales. This integration allows Oracle Proposals users to create a proposal from an opportunity in Oracle Field Sales, Oracle Telesales, or Oracle Sales, where information from the opportunity is pulled into the proposal during the proposal creation process. If the opportunity is related to a campaign schedule, the proposal template associated to the campaign schedule will automatically be used.

Customer Integration

Oracle Proposals is integrated with **Customer** in Oracle Field Sales, Oracle Telesales, and Oracle Sales. This integration allows Oracle Proposals users to create a proposal

from a customer in Oracle Field Sales or Oracle Telesales, where information from the customer is pulled into the proposal during the proposal creation process. If the customer is related to a campaign schedule, the proposal template associated to the campaign schedule will automatically be used. Oracle Proposals users can also view proposals from **Customer** in Oracle Sales.

Guided Proposal Content Building

Oracle Proposals enables users to track their progress while building a proposal, so they can see at a glance whether proposal components are complete. Users can determine the order of proposal components, and include or exclude optional components. Dynamic fields in the components capture required information from objects specified by or entered by the user.

Administrators have the ability to specify if a proposal file created for a template can have files added to it. Users can then add external files from their desktop, the Oracle Content Manager Library or Oracle Content Manager Folders.

Proposal Document Generation

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

E-Mail Delivery

Using Oracle Proposals, users can e-mail proposals to customers and other recipients. The user selects the appropriate proposal document version, specifies customer contacts, and then e-mails them to the contacts and other recipients. A record of the e-mail delivery is also recorded under the customer name in Interaction History.

Proposal Views and Searches

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

Oracle Proposals is now integrated with Oracle Trading Community Architecture (TCA). The Data Quality Management (DQM) functionality in TCA allows for expanded customer and contact search capabilities. It is a tool that can be used to help keep your data clean by minimizing the creation of duplicate parties. When

DQM is enabled, the fields that you see in the Simple/Advanced Search: Person/Organization pages, are dynamically generated based on setups made by you system administrator for DQM.

Proposal Templates

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

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

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 proposal 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. Users can create these RTF files in their favorite word editor, utilize them in proposal components, and store them in Oracle Content Manager for reuse.

Dynamic Fields

Administrators can include dynamic fields in the component documents to reference information from various sources. For example, a cover letter, where the customer name and address changes, can have a dynamic fields inserted into the locations of where the customer name and address would be. The user can then personalize the cover letter for a particular customer.

Specifically, values for dynamic fields can come from the user (such as proposal title), database objects (such as items and pricing), 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.

Before You Begin

This chapter provides an overview of what you need to have installed, implemented, and verified before implementing Oracle Proposals. Topics include:

- [Section 2.1, "Related Documentation"](#)
- [Section 2.2, "Installation Verification"](#)
- [Section 2.3, "Oracle Proposals Conditional Dependencies"](#)
- [Section 2.4, "Integration Points"](#)
- [Section 2.5, "Technology Stack"](#)

2.1 Related Documentation

Oracle Proposals User Guide, Release 11i

Oracle Applications System Administrator's Guide, Release 11i

Oracle Content Management Implementation Guide, Release 11i

Oracle Trading Community Architecture Administration User Guide

Oracle CRM Application Foundation Implementation Guide, Release 11i

Oracle CRM Technology Foundation Implementation Guide, Release 11i

Oracle CRM Technology Foundation Concepts and Procedures, Release 11i

Implementing Oracle (HRMS), Release 11i.

Oracle Quoting Implementation Guide, Release 11i

Oracle Quoting User Guide, Release 11i

Oracle Marketing Implementation Guide, Release 11i

Oracle Marketing User Guide, Release 11i

Oracle Field Sales Implementation Guide, Release 11i

Oracle Field Sales User Guide, Release 11i

Oracle Telesales Implementation Guide, Release 11i

Oracle Telesales User Guide, Release 11i

Oracle Sales User Guide, Release 11i

Oracle Sales Implementation Guide, Release 11i

2.2 Installation Verification

Before proceeding with the implementation of Oracle Proposals, you must verify that you have installed Oracle Applications correctly. See *Installing Oracle Applications* and *Oracle CRM Application Foundation Implementation Verification Checklists Release 11i* for more information.

2.3 Oracle Proposals Conditional Dependencies

Oracle Quoting: Oracle Proposals requires the setup and installation of Oracle Quoting if your users will be adding quotes to a proposal, creating a proposal from a quote, or using the quote dynamic field substitution functionality. Please see the *Oracle Quoting Implementation Guide, Release 11i* for more details.

Oracle Contracts: Oracle Contracts is a conditional dependency for Oracle Proposals if being pulled in as a part of a quote through Oracle Quoting. A profile option in Oracle Quoting determines whether Oracle Contracts will be utilized, so Oracle Contracts is a dependency only if the Oracle Proposals user is going to use Oracle Quoting with Oracle Contracts enabled. If Oracle Contracts is enabled, Oracle Proposals does not support the following in 11.5.10 release of Oracle Contracts:

- Table tokens in Contracts templates are not resolved by Oracle Proposals. Users will therefore have to make sure that table tokens are not utilized in Oracle Contracts if they want to bring in article text into a Proposal.
- Article text authored using **Rich Text** mode in Oracle Contracts: Oracle Contracts allows users to specify some formatting within their Articles authoring page. Oracle Proposals will not render this formatting information in the generated proposal. Users should therefore make sure that they author their terms using **Plain Text** mode while authoring articles.

Oracle Marketing: Oracle Proposals requires the setup and installation of Oracle Marketing if your users will be associating proposal templates to campaign schedules. Please see the *Oracle Marketing Implementation Guide, Release 11i* for more details.

Oracle Field Sales and Oracle Telesales: Oracle Proposals requires the setup and installation of Oracle Field Sales or Oracle Telesales if your users will be creating proposals from **Opportunity** or from **Customer**. Please see the *Oracle Field Sales Implementation Guide, Release 11i* or the *Oracle TeleSales Implementation Guide, Release 11i* for more details.

Oracle Sales: Oracle Proposals requires the setup and installation of Oracle Sales if your users will be creating proposals from **Leads** or from **Opportunity**. Please see the *Oracle Sales Implementation Guide, Release 11i* for more details.

Oracle Trading Community Architecture: Oracle Proposals leverages Trading Community Architecture's Data Quality Management (DQM) functionality in the customer search components. DQM allows the user to set up advanced match rules as well as define the search criteria and results for the search screens. Consult the *Oracle Trading Community Architecture Administration User Guide* for more details.

Oracle Proposals utilizes the **Party Merge** and **Account Merge** functionalities, which are part of the DQM tools provided by TCA. You can use **Party Merge** and **Account Merge** to identify and resolve duplicates that exist in the Trading Community registry. Refer to the latest version of the *Oracle Trading Community Architecture: Party and Account Merge Impact* document posted on the *Oracle Trading Community Architecture Manuals and eTRMs* page (ID# 164517.1) of OracleMetalink for more details.

2.4 Integration Points

Listed below is basic information on Oracle Proposals integrations. Please see [Chapter 5, "Oracle Proposals Integrations"](#) for more details.

2.4.1 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.

- **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.
- **Content Manager:** Content Manager is a central repository for all content that is used for storing and reusing RTF files for Oracle Proposals. The repository can be accessed either through folders or library categories.
- **Trading Community Architecture:** Trading Community Architecture (TCA) is a model for maintaining complex information about the parties and customers who belong to an entity's commercial community and is the single source of trading community information that all Oracle E-Business Suite Applications utilize. Proposals has uptaken TCA customer and contact search pages, so that information pulled comes from TCA. In Proposals, the user can search for a customer, by Person or by Organization, and a contact from TCA.

2.4.2 Third Party Integrations

- Oracle Proposals generates proposal documents in RTF (Rich Text Format) format viewable in any third party word processors. Integration with word processing/editing programs with RTF creation capability is necessary to:
 - Create and store standard component content, including dynamic fields and formatting style.
 - View generated proposal documents.
- Recipients of the proposals may require a zipping application to unzip a generated proposal document from a zipped source.

2.5 Technology Stack

Desktop Tier

- RTF (Rich Text Format) editor that supports RTF specification 1.5 and above, for example MS Word 2000.

Note: Using Microsoft WordPad as your primary RTF editor is NOT recommended.

Part II

Implementing Oracle Proposals

This section contains the following chapters:

- [Chapter 3, "Implementation Overview"](#)
- [Chapter 4, "Implementation Tasks for Oracle Proposals"](#)

Implementation Overview

3.1 Oracle Proposals Implementation Overview

Mandatory implementation steps are required for Oracle Proposals to function properly. Oracle recommends that you implement Oracle Proposals in the order listed.

This chapter includes:

- [Section 3.2, "Implementation Task Sequence"](#)

3.2 Implementation Task Sequence

The steps needed for implementing Oracle Proposals are listed in the order in which they should be carried out.

The following table describes the order and process of implementing Oracle Proposals.

Table 3–1 Implementation Task Sequence

Step	Description	Performed Where	Performed By
1	Add PRP Patch.	Environment	System Administrator
2	Check dependencies.	Environment	System Administrator
3	Create users, or identify existing users and verify their responsibility. Assign administrators the Proposals Main Menu . Assign sales representative users the Proposal Homepage Function .	Forms	System Administrator

Table 3–1 Implementation Task Sequence

Step	Description	Performed Where	Performed By
4	Assign appropriate menu to any new responsibility.	Forms	System Administrator
5	Verify administrators and sales representative users are resources in Resource Manager.	Forms	System Administrator
6	Set up profile options.	Forms	System Administrator

Implementation Tasks for Oracle Proposals

Perform the following tasks to implement Oracle Proposals:

- [Section 4.1, "Setting up Users"](#)
- [Section 4.2, "User Types Overview"](#)
- [Section 4.3, "User Type Setup"](#)
- [Section 4.4, "E-mail Setup"](#)
- [Section 4.5, "Administration Tasks"](#)
- [Section 4.6, "Verify the Implementation"](#)

4.1 Setting up Users

This section covers the following:

- [Section 4.1.1, "Oracle Applications Forms Login"](#)

Note: Users can also be set up using the Oracle System Administrator Console. Please see the following documentation for additional user setup instructions and information:

- *Oracle Applications System Administrator's Guide, Release 11i*
- *Oracle CRM Technology Foundation Implementation Guide, Release 11i*
- *Oracle CRM Technology Foundation Concepts and Procedures, Release 11i*

4.1.1 Oracle Applications Forms Login

The system administrator assigns the **FND** menus for Oracle Proposals users.

Before making Oracle Forms settings, verify that Oracle Applications is up and running. Because some setup steps require running concurrent programs, you must ensure that the concurrent managers are running. Consult your Oracle Applications system administrator for additional information.

For more information on Oracle Applications, refer to *Oracle Applications Concepts, Release 11i*.

4.2 User Types Overview

There are two main types of Proposals users, administrators and users. This section covers the following:

- [Section 4.2.1, "Oracle Proposals Administrators"](#)
- [Section 4.2.2, "Oracle Proposals Users"](#)

4.2.1 Oracle Proposals Administrators

Administrators have access to both the **Administration** sub-tab and the **Dashboard** sub-tab. Administrators must also be set up as a **Resource** in Resource Manager. From the Administration sub-tab, they can view, access, create, delete, and generate administrative data including:

- Templates
- Components
- Dynamic Fields
- Template Categories

From the Dashboard sub-tab, these users can:

- Create Proposals
- View Proposals
- Delete Proposals
- Modify Proposals
- Generate Proposals
- Email Proposals
- Search for Proposals

Administrators, like regular users, can only view and update those proposals they have created. There is no administrative access to all users' proposals.

4.2.2 Oracle Proposals Users

Oracle Proposals Users have access to the Dashboard sub-tab and its basic user functions. They must be set up as a **Resource** in Resource Manager. They will **not** have access to the Administration sub-tab where administrative data can be created, modified, or viewed. Dashboard users can:

- Create Proposals
- View Proposals
- Delete Proposals
- Modify Proposals
- Generate Proposals
- E-mail Proposals
- Search for Proposals

4.3 User Type Setup

Listed below are instructions for creating users for Oracle Proposals. Topics include:

- [Section 4.3.1, "Creating a Resource"](#)
- [Section 4.3.2, "Creating an FND User and Assigning Responsibilities, Menus and Functions"](#)

To access Oracle Proposals, a user must be set up as an **FND User** and as a **Resource** in Resource Manager. When a user logs into Oracle Proposals, a check is made against the FND table. Oracle Proposals checks to see if the **FND User** is a **Resource** first. If the user is set up as a **Resource** in Resource Manager, then the user's information such as name, title, phone, fax, e-mail id and address is picked from there. Care must be taken to ensure that if the user is a resource, all user information is stored correctly in Resource Manager. If the user information is not available in either FND or Resource Manager, the user's information will be blank.

Note: The **FND User** name must be assigned to the user name field in Resource Manager.

4.3.1 Creating a Resource

If you want all users to have access to Oracle Proposals, they must be set up as valid resources in Oracle Resource Manager.

You can create a **Resource** either by entering the user information into Resource Manager, or by importing an employee from Oracle Human Resources into Resource Manager.

In order to synchronize any changes that have been made to employee information in Human Resources with Resource Manager, you must run the **Synchronize Employee** concurrent program from CRM administrator responsibility.

If you do not create a resource properly for the user, the user will get an error message when accessing proposals:

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

For information on creating a resource, see the *Oracle CRM Application Foundation Concepts and Procedures*.

4.3.2 Creating an FND User and Assigning Responsibilities, Menus and Functions

In Self-Service mode, there are two seeded responsibilities that can be assigned to the user and gives the user access to Oracle Proposals outlined in [Section 4.2, "User Types Overview"](#):

- Oracle Proposals Administrator
- Oracle Proposals User

In Self-Service mode and JTF mode, the system administrator can utilize an alternative method of assigning menus and functions to the Oracle Proposals user once the FND user has been created and a responsibility has been assigned:

- **Proposal Main Menu** (PRP_MAIN_MENU)
- **Proposal Homepage Function** (PRP_PR_PROPOSAL_HOME)

For instruction on assigning menus and functions to responsibilities, and creating menus, see the *Oracle Applications System Administrator's Guide, Release 11i*.

4.4 E-mail Setup

There are two profile options that need to be set for e-mail capability in Oracle Proposals:

- **PRP: SMTP Server Name**
- **PRP: SMTP Server Port**

Please refer to [Section A.4, "Current Oracle Proposals Profile Options"](#) for more details.

Oracle Proposals uses the e-mail address stored in Resource Manager for the contact. Therefore, the **Synchronize Employee** Concurrent Manager needs to be run any time there is an update to e-mail information in Human Resources or FND.

Note: If the **Synchronize Employee** Concurrent Manager is not run properly, the sales representative's e-mail address used to e-mail the proposal to the customer will not be correct.

Users should be given access to the e-mail SMTP server from the middle tier. Otherwise, users may experience difficulties and receive an error when e-mailing proposals.

4.5 Administration Tasks

If you need instructions on the template creation and management process, please see the *Oracle Proposals User Guide, Release 11i* for administration task steps and information. Before users can create proposals, an administrator needs to set up:

- Template Categories
- Templates
- Components
- Dynamic Fields

Refer to Section 1.1, "Overview" of the *Oracle Proposals User Guide, Release 11i* for an overview of how the above listed elements are related.

4.6 Verify the Implementation

Verify that you can perform the following tasks after you have finished:

- Creating users and assigning the appropriate menu or function.
- Verifying that the **FND User** name is populated and that the user is in Resource Manager as a **Resource**.

- Setting up the Oracle Proposals profile options.
- Creating and administering template categories, components, and templates (See the *Oracle Proposals User Guide, Release 11i*).

You must be able to complete all of following tasks successfully, or Oracle Proposals has not been implemented properly. For instructions on how to perform these tasks, consult the *Oracle Proposals User Guide, Release 11i*.

- Create a proposal.
- View a proposal.
- Generate a proposal document.
- Delete a proposal.
- E-mail a proposal document.

If you are able to perform these functions successfully, the implementation has been successful.

Part III

Integration of Oracle Products

This section contains the following chapter:

- [Chapter 5, "Oracle Proposals Integrations"](#)

Oracle Proposals Integrations

This chapter contains information on integration with Oracle Content Manager, Oracle Quoting, Oracle Marketing, Oracle Field Sales, Oracle Telesales, Oracle Sales, and Oracle Trading Community Architecture. Topics include:

- [Section 5.1, "Integration with Oracle Content Manager"](#)
- [Section 5.2, "Integration with Oracle Quoting"](#)
- [Section 5.3, "Integration with Oracle Marketing"](#)
- [Section 5.4, "Integration with Oracle Field Sales and Oracle Telesales"](#)
- [Section 5.5, "Integration with Oracle Sales"](#)
- [Section 5.6, "Integration with Oracle Trading Community Architecture"](#)
- [Section 5.7, "Third Party Integration"](#)

5.1 Integration with Oracle Content Manager

Oracle Proposals supports integration with Oracle Content Manager (OCM). OCM is a central repository where users and administrators can maintain files in folders and in the library. Oracle Proposals users will be able to reuse existing files stored in the folders and library as well as store files from desktop into an OCM folder. OCM is not mandatory, however, it is needed to reuse and share files from a common repository.

5.1.1 Setting the PRP: Use Oracle Content Manager Profile

Setting the profile option, **PRP: Use Oracle Content Manager** allows the administrator to determine the level of integration with Oracle Content Manager. See [Appendix A.4.10, "PRP: Use Oracle Content Manager"](#) for more details.

5.1.2 Setting the IBC: Use Access Control Profile

Oracle Content Manager (OCM) utilizes permissions at the folder and library level. Permissions give users the ability to perform certain actions on a folder or a category in the library. The OCM profile, **IBC: Use Access Control**, determines whether permissions will be overridden or not. Oracle Proposals honors this profile. See [Appendix A.5.1, "IBC: Use Access Control"](#) for more details. You can also refer to the *Oracle Content Manager Implementation Guide, Release 11i* for more information on permissions.

5.1.3 Setting Folder Permissions

If **IBC: Use Access Control** is set to **Yes**, then folder permissions apply.

In order to integrate Oracle Content Manager (OCM) with Oracle Proposals, appropriate permissions to OCM Folders must be given to the users and administrators by an OCM administrator. These permissions must be given at the time of implementation.

For manageability, Oracle Proposals has seeded folders to allow easy setups of the folder integration. Oracle Proposals has seeded two different folders, one for the Oracle Proposals users and the other for the Oracle Proposals administrators. See [Appendix B, "Permissions for Oracle Content Manager"](#) for a breakdown of the permissions needed to store and reuse files from the OCM Folders and Library.

5.1.3.1 Seeded Proposal User Folder

- **Seeded Folder Name:** Users
- **Directory:** Root/Proposals/Users

This folder has been seeded to allow Proposals users to create their own personal folder under. At the time of implementation, Proposal users should be given **Create Sub-folder** permission to this seeded folder. This allows users to create their own sub- folder. Proposals will automatically give the user the necessary permissions to upload and view files in the newly created folder. Permissions from the seeded folder will not be inherited to the newly created folder.

Note: Oracle Content Manager allows permissions to be given at different levels, i.e., user, responsibility, group, etc. An easy and quick way to give permissions to the Oracle Proposals users is to grant permissions via the user's responsibility.

5.1.3.2 Seeded Proposal Administrator Folder

- **Seeded Folder Name:** Documents
- **Directory:** Root/Proposals/Administrator/Documents

This folder has been seeded to allow Oracle Proposals administrators the ability to share, upload, and view all files used in creating components as well as allow administrators to create folders. Since administrators will share files and may have the need to translate Oracle Proposals files used in components in a multi-language implementation, all the Oracle Proposals administrators should be given the following permissions to this folder: **Create Sub-folder, Manage Item, Approve Item, Approve Translation, Translate Item, and Read Item**. For any newly created folders, the permissions will be copied from the Documents folder for all users.

See [Appendix B.1, "Seeded Folders"](#) for a summary of folder permission requirements.

5.1.4 Setting Library Permissions

Users and administrators must be given **View Content** permission to categories in order to select and add files to the proposals and components. See [Appendix B.5, "Browse and Search Folders and Library Categories"](#) for more details.

5.1.5 Consuming Oracle Content Manager Content Items in Oracle Proposals

Content items must have the following attributes to be viewed and used within Oracle Proposals' search/browse screens for the Library and Folders. If the content item does not have the following attributes, it will not be delivered to the user.

- Has an extension of ".rtf"
- Is a valid rtf
- Is live
- Is approved
- Is in the user's session language

Files stored in Oracle Content Manager through the Oracle Proposals UI will automatically be stored with these attributes and will be of content type, **File**.

5.1.6 Setting the IBC: Default Home Folder Profile

Setting this profile option allows the user to choose the default folder that users can store files in and browse in. Refer to [Appendix A.5.2, "IBC: Default Home Folder"](#) for more details.

5.2 Integration with Oracle Quoting

Oracle Proposals supports integration with Oracle Quoting. Quotes can be used in Proposals provided Oracle Quoting is installed.

5.2.1 Setting up Proposal Creation from Quotes

Oracle Quoting integrates with Oracle Proposals to create proposals from quotes and to add existing quotes to proposals. The objective of this integration is to extract quote information and pull it into the proposal. When a proposal is being generated, Oracle Proposals pulls in the latest quote information from the relevant quote in Oracle Quoting.

Note: Proposals that are generated before a quote is updated will need to be regenerated to reflect the quotes current content.

In order to integrate Oracle Quoting with Oracle Proposals, you must have Oracle Quoting installed. Please see the *Oracle Quoting Implementation Guide, Release 11i* for details.

5.2.2 Setting up Accessibility to Quotes from Proposal Detail Page

In the Proposal Detail page, the name of the quote from which the proposal was created can be hyperlinked, allowing the user to navigate to the quote. This can be done by assigning the `QOT_QUOTE` menu to the user's responsibility.

5.3 Integration with Oracle Marketing

Oracle Proposals supports integration with campaign schedules in Oracle Marketing. Proposal templates can be associated to campaign schedules only if Oracle Marketing is installed.

5.3.1 Setting up Proposal Template Association to Campaign Schedules

In order to integrate Oracle Marketing with Oracle Proposals, you must have Oracle Marketing installed. Please see the *Oracle Marketing Implementation Guide, Release 11i* for details.

5.4 Integration with Oracle Field Sales and Oracle Telesales

Oracle Proposals supports integration with Oracle Field Sales and Oracle Telesales. Users are able to create proposals from an opportunity or customer from these products.

5.4.1 Setting up Proposal Creation from Opportunity or Customer

In order to integrate Oracle Field Sales or Oracle Telesales with Oracle Proposals, you must have them installed. Please see the *Oracle Field Sales Implementation Guide, Release 11i* or the *Oracle TeleSales Implementation Guide, Release 11i*, for details.

5.5 Integration with Oracle Sales

Oracle Proposals supports integration with Oracle Sales. Users can create proposals from **Opportunity** and **Leads** and view all proposals for a customer provided that Oracle Sales is installed.

5.5.1 Setting up Proposal Creation from Leads

In order to integrate Oracle Sales with Oracle Proposals, you must have it installed. Please see the *Oracle Sales Implementation Guide, Release 11i* for details.

5.5.2 Setting up Accessibility to Opportunities and Leads from Proposal Detail Page

An Oracle Proposals user who has logged into Self-Service mode can select, in the Proposal Detail page, a link to the opportunity or lead information from which the proposal was created. The `ASN_OTHER_MENU` menu must be assigned to the user's responsibility in order for the links to be available.

5.6 Integration with Oracle Trading Community Architecture

Oracle Trading Community Architecture (TCA) integrates with Oracle Proposals for providing a central customer data repository. Data Quality Management (DQM) is

a functionality in TCA that allows the Oracle Proposals user to select a customer and contact for the proposal from TCA.

5.6.1 Setting up Data Quality Management (DQM) Customer and Contact Search

In order to utilize Data Quality Management (DQM) in Oracle Proposals, you must have Oracle Trading Community Architecture installed. Setting up DQM in Oracle Proposals is not mandatory. If it is not set up, the Oracle Proposals search page consist of a simple LOV. If DQM is set up, the customer and contact search pages consist of simple or advanced search parameters that leverage the DQM functionality. Refer to the *Defining Match Rules and Data Quality Management Search Profile Options* section of the *Oracle Trading Community Architecture Administration User Guide*.

The **Party Merge** and **Account Merge** functionalities, which are part of the DQM tools provided by TCA, can be used to identify and resolve duplicates that exist in the Trading Community registry. Refer to the latest version of the *Oracle Trading Community Architecture: Party and Account Merge Impact* document posted on the *Oracle Trading Community Architecture Manuals and eTRMs* page (ID# 164517.1) of *OracleMetalink* for more details.

5.7 Third Party Integration

- 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:
 - Create and store standard component content, including dynamic fields as well as formatting style.
 - View generated proposal document.

Part IV

Appendices

This section contains the following appendices:

- [Appendix A, "Oracle Proposals Profile Options"](#)
- [Appendix B, "Permissions for Oracle Content Manager"](#)

Oracle Proposals Profile Options

This chapter describes profile option settings that are required for successful implementation. Topics include:

- [Section A.1, "Before You Begin"](#)
- [Section A.2, "Setting Profile Options"](#)
- [Section A.3, "Finding Responsibility ID Values"](#)
- [Section A.4, "Current Oracle Proposals Profile Options"](#)
- [Section A.5, "Current Oracle Proposals Profile Options for Oracle Content Manager"](#)
- [Section A.6, "Current Oracle Proposals Profile Options for Oracle Trading Community Architecture"](#)

A.1 Before You Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to `$COMMON_TOP/admin/scripts`, and executing `adcmctl.sh <APPS username/APPS password> start`.

A.2 Setting Profile Options

Use the following procedure to set any profile option.

Navigation

Oracle Forms > Profile > System > Find Profile System Values window

Notes

Check the level(s) at which you want to set the profile option: **Site, Application, Responsibility, and/or User.**

In the **Profile** field, you can enter the profile name, such as `PRP: Default Number of Days for Proposals Due Date` or a wildcard search criterion such as `PRP%`, to find the profile you are looking for.

A.3 Finding Responsibility ID Values

You must know the **APPLICATION_ID** values and **RESPONSIBILITY_ID** values before you can set the required Oracle CRM Technology Foundation (JTT) profile options for users.

Note: The **APPLICATION_ID** value for the responsibilities is 694.

Use the following procedure to find the **APPLICATION_ID** value and **RESPONSIBILITY_ID** value of a responsibility. You'll need to log in with System Administrator responsibility.

Navigation

Oracle Forms > Security > Responsibility > Define > Responsibilities form > View > Find

Steps

The **Responsibility** form is populated with the record for the responsibility that you chose. Place your cursor in any field of the record and then navigate to Help > Diagnostics > Examine.

In the **Examine** Field and **Variable Values** window, choose **APPLICATION_ID** from the field LOV. The value field in the **Examine** Field and **Variable Values** window is populated with the value of **APPLICATION_ID**.

In the **Examine** Field and **Variable Values** window, choose **RESPONSIBILITY_ID** from the field LOV. The value field in the **Examine** Field and **Variable Values** window is populated with the value of **RESPONSIBILITY_ID**.

A.4 Current Oracle Proposals Profile Options

When implementing Oracle Proposals, you must set specific profile options.

Current Oracle Proposals profile options:

- PRP: Access to Unpublished Templates
- PRP: Max File Size in KB for Template Online Preview
- PRP: Maximum File Size for Online Generation
- PRP: Default Days for Recent Proposals
- PRP: Proposals Due Within “X” Days
- PRP: Default Number of Days for Proposal Due Date
- PRP: SMTP Server Name
- PRP: SMTP Server Port
- PRP: Default Customer Type
- PRP: Use Oracle Content Manager

Table A–1 Current Oracle Proposals Profile Options

Profile Option Name	Default Value	Description
Access to Unpublished Templates	No	Enables administrators to view and create proposals from unpublished templates.
Max File Size in KB for Template Online Preview	Null	Determines the maximum size of the combined file for which preview will be enabled.
Maximum File Size For Online Generation	Null	Determines maximum file size for proposals that will be generated online.
Default Days for Recent Proposals	10	Determines Dashboard display for recent proposals.
Proposals Due Within “X” Days	10	Determines Dashboard display for proposals due within a certain number of days.
Default Number of Days for Proposal Due Date	10	Determines proposal’s default due date by adding on a certain number days to proposal creation date.

Table A-1 Current Oracle Proposals Profile Options(Cont.)

Profile Option Name	Default Value	Description
SMTP Server Name	N/A	Provides the SMTP server name to be used for e-mailing proposals
SMTP Server Port	N/A	Provides the port number of the SMTP server to be used in connecting to the SMTP server. If no value is set, e-mail is sent using the default port (port number 25) of the SMTP server.
Default Customer Type	Organization	Determines the default customer search type.
Use Oracle Content Manager	No	Allows administrator to determine the level of Oracle Content Manager integration.

A.4.1 PRP: Access to Unpublished Templates

This profile option determines if users with the Proposal administrator responsibility have access to use unpublished templates to create proposals. If the profile option is set to **Yes**, the administrator can use unpublished template to create proposals.

Name: Access to Unpublished Templates

Set at: Enabled at all levels

Default Value: No

A.4.2 PRP: Max File Size in KB for Template Online Preview

This profile option determines the maximum size of the combined file for which preview will be enabled.

Name: Max File Size in KB for Template Preview

Set at: Site level

Default Value: Null

Default Behavior: If null, preview is allowed all the time.

A.4.3 PRP: Maximum File Size for Online Generation

When users click on the **Generate Proposal Document** button, the set value determines whether the proposal document is generated *online* or *offline*. The profile value determines the maximum size for a file that can be generated online. Any document that surpasses this value will be generated offline, and the **Generate Proposal** Concurrent Manager is automatically started. Please see the *Oracle Applications System Administrator's Guide* for more details on running the concurrent program for offline generation.

Name: Maximum File Size for Online Generation

Set at: Site level (not enabled for other levels)

Default Value: Null

Default Behavior: If it is null, all generation is done online.

A.4.4 PRP: Default Days for Recent Proposals

This seeded profile option determines the display option for the **Recent Proposals** section of the **Dashboard** page. Proposals listed in this section have been updated or created within "X" days, where "X" represents the chosen value.

Name: Default Day for Recent Proposals

Set at: Application (Seeded), Responsibility, and User levels

Default Value: 10

A.4.5 PRP: Proposals Due Within "X" Days

This seeded profile option determines the display option for **Proposals Due Within "X" Days** section of the **Dashboard** page. Proposals listed in this section have a due date within "X" days from the current date, where "X" represents the chosen value.

Name: Proposals Due Within "X" Days

Set at: Application (Seeded), Responsibility and User levels

Default Value: 10

A.4.6 PRP: Default Number of Days for Proposal Due Date

During the proposal creation process, the default due date will be reflected in all new proposals. The Default Due Date is equal to the current date plus the set value in terms of days.

Name: Default Days for Due Proposals

Set at: Application (Seeded), Responsibility and User levels

Default Value: 10

A.4.7 PRP: SMTP Server Name

This profile option provides the SMTP server name to be used for e-mailing proposals. Users should be given access to the SMTP server from the middle tier. Otherwise, users may experience difficulties and receive an error when e-mailing proposals.

Name: SMTP Server Name

Set at: Site Level

Default Value: N/A

A.4.8 PRP: SMTP Server Port

This profile option provides the port number of the SMTP server to be used in connecting to the SMTP server. If no value is set, e-mail is sent using the default port (port number 25) of the SMTP server.

Name: SMTP Server Port

Set at: Site Level

Default Value: N/A

A.4.9 PRP: Default Customer Type

This profile option determines the customer type that is defaulted in the customer search screen: by **Organization** or by **Person**.

Name: Default Customer Type

Set at: All Levels

Default Value: Organization

Default Behavior: Customer search defaults to Organization.

A.4.10 PRP: Use Oracle Content Manager

This profile option allows the administrator to determine the level of integration with Oracle Content Manager (OCM). The profile values are **Mandatory**, **Optional**, and **No**. The if the profile option is set to **Mandatory**, users can select files from the OCM Library or Folders. When adding files from the desktop, users must store the file in an OCM Folder. If the profile option is set to **Optional**, users have the option to store the file added from the desktop into an OCM Folder. User can select files from the OCM Library or Folders and add them to a proposal. If the profile option is set to **No**, users cannot select files from the OCM Library or Folders, nor can they store desktop files in OCM.

Name: Use Oracle Content Manager

Set at: All Levels

Default Value: No

Default Behavior: Users cannot add or store files from or in OCM.

A.5 Current Oracle Proposals Profile Options for Oracle Content Manager

Specific Oracle Content Manager profile options must be set during Oracle Proposals implementation. For more information on Oracle Content Manager profile options, refer to the *Oracle Content Manager User Guide, Release 11i*.

A.5.1 IBC: Use Access Control

To remain consistent with Oracle Content Manager's (OCM) security, Oracle Proposals honors this profile. If this profile is set to **Yes**, OCM will take into account the permissions set at the folder and category levels and Proposals users will need the appropriate permissions to update, view, upload, etc. files in the OCM folders and library. If the profile is set to **No**, OCM does not look at the permissions and gives full access to the folders and categories. Proposals users will have the ability to access any folder/category and will be able to upload/view/update to any folder. Refer to [Appendix B, "Permissions for Oracle Content Manager"](#) for more information.

Name: Use Access Control

Set at: All Levels

Default Value: No

A.5.2 IBC: Default Home Folder

This profile option determines which folder in Oracle Content Manager (OCM) will be the default folder for users to store files.

Note: Administrator screen always default to the seeded Documents folder.

Name: Default Home Folder

Set at: User level

Default Value: null

Default Behavior: No folder will default in the Content Manager folder section for storing desktop files. The **Browse Folder** field will default to the root OCM folder.

A.6 Current Oracle Proposals Profile Options for Oracle Trading Community Architecture

Specific Oracle Trading Community Architecture (TCA) profile options must be set during Oracle Proposals implementation. If the profile option, **HZ: Enable DQM Party Search** is set to **Yes**, match rules are set for the following profile options that determine the search criteria available to users:

- HZ: Match Rule for Organization Advanced Search
- HZ: Match Rule for Organization Simple Search
- HZ: Match Rule for Person Advanced Search
- HZ: Match Rule for Person Simple Search

Your system administrator can change these profile option settings to a different match rule, or modify the currently set match rule. For more information on Oracle TCA profile options, refer to the *Defining Match Rules and Data Quality Management Search Profile Options* section of the *Oracle Trading Community Architecture Administration User Guide*.

A.6.1 HZ: Enable DQM Party Search

This profile option determines whether users in Oracle Proposals can utilize Data Quality Management (DQM) for customer and contact searches. DQM is a tool that can be used to help keep data clean by minimizing the creation of duplicate parties.

If the profile option is set to **No**, the Oracle Proposal search for customers and contacts is a simple LOV. If the profile option is set to **Yes**, the Oracle Proposal customer and contact searches display additional parameters from DQM by which to search.

Name: Enable DQM Party Search

Set at: Site, Application, and Responsibility levels

Default Value: No

Default Behavior: Simple LOV customer and contact search in Oracle Proposals.

Permissions for Oracle Content Manager

This section describes the permissions that are needed or recommended for the Oracle Content Manager (OCM) Folders and OCM Library categories. These permissions are only needed if the **IBC: Use Access Control profile** option is set to **Yes**. Refer to [Appendix A.5.1, "IBC: Use Access Control"](#) for more information about this profile option.

B.1 Seeded Folders

Table B-1 Seeded Folders

Folder Directory	Seeded for:	Recommended Access (given by OCM Admin)
Root/Proposals/Users	Allow users to create folders in the desktop flow	Create Sub-Folder
Root/Proposals/Administrator/Documents	Allow administrators to upload and share files with other administrators.	Create Sub-Folder Manage Item Approve Item Approve Translation Translate Item Read Item

B.2 Create Folder

Following are the permissions given to the administrator or user that is creating the folder. Folders will only be created under the seeded folders. Permissions will be inherited from the seeded folder in the administration flow only. In the user flow, the permissions will not be inherited.

Table B-2 Permissions Given for Newly Created Folders

Flow	Permissions Given to Newly Created Folder	Directory that Folders will be Created Under:
User	Manage Folder Manage Item Translate Item Read Item Create Sub-Folder Approve Item Approve Translation	Root/Proposals/Users
Administrator	Manage Folder Manage Item Translate Item Read Item Create Sub-Folder Approve Item Approve Translation	Root/Proposals/Administrators/Documents

B.3 Add File from Desktop flow

The following permissions are needed to store files in an Oracle Content Manager folder

Table B–3 Permissions for Storing Files in an Oracle Content Manager Folder

Flow	Permissions Needed	Which Folders?	Default Folder
User	Manage Item Approve Item Read Item	Any folder with these permissions	Folder specified in IBC: Default Home Folder profile option.
Administrator	Manage Item Approve Item Read Item	Any folder with these permissions	Root/Proposals/Administrators/Documents

B.4 Uploading an Associated Version Flow

If an administrator is uploading a non-base language version of a file, the administrator will need the following permissions:

Table B–4 Permissions for Uploading an Associated Version

Flow	Permissions Needed	Which Folders?
Administrator	Manage Item Approve Translation Read Item Approve Item Translate Item	Any folder with these permissions.

Note: If the administrator is uploading the base language in the Associate Version flow, the permissions will be the same as the **Add File from Desktop** flow.

B.5 Browse and Search Folders and Library Categories

Users/administrators must have the following permissions to browse or search the folders or categories:

Table B-5 *Permissions for Browsing or Searching Folders or Categories*

Folders or Categories	Permissions Needed	Which Folders?
Folders	Read Item	Any folder with these permissions.
Categories	View Content	Any category with these permissions.

Glossary

Component

Piece of standard content that might be included in a proposal template. Standard content can consist of text, graphics, tables, and other types. A component can reference one or more physical files. A component document references standard content in RTF format that might be included in a proposal template.

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.

Dynamic Field

References to the dynamic fields used to generate the proposal output. Dynamic fields values are chosen by the administrator. Dynamic fields can either be seeded by the application or can be 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.

Folder

Oracle Proposals users are able to add files from folders for which they have permission in Oracle Content Manager.

Library

The Oracle Content Manager (OCM) Library is a repository that OCM users can publish content to certain categories that have been setup by an administrator.

List of Values (LOV)

A list of valid values for a drop-down 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 object.

Proposal Document

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

Remarks

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

RTF file

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

Status

Status of the proposal document 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 this list.

Version

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

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