

Oracle® Proposals

User Guide

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Oracle Proposals User Guide, Release 11i

Part No. B12235-02

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Oracle Proposals User Guide, Release 11i

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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.

- Did you find any errors?
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Preface

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

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 Oracle Proposals User Guide contains the information you need to understand and use Oracle Proposals. This guide contains seven chapters:

- [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"](#) - provides instructions on administering template categories, templates, proposals, components, and dynamic fields.
- [Chapter 4, "Accessing Proposals from the Dashboard"](#) - provides instructions for accessing and searching for proposals.
- [Chapter 5, "Creating and Deleting Proposals"](#) - provides instructions for creating and deleting proposals.
- [Chapter 6, "Personalizing Proposal Content"](#) - provides instructions for personalizing the proposal content.
- [Chapter 7, "Generating and Working with Proposal Versions"](#)s - provides instructions for performing the various activities of proposal version use and management.
- In addition, the following appendices are included in this guide:
 - [Appendix A, "Seed Data"](#)
 - [Appendix B, "Dynamic Field Structure in RTF Files"](#)
 - [Appendix C, "Creating Java Program Dynamic Fields"](#)
 - [Appendix D, "Permissions for Oracle Content Manager"](#)

Documentation Accessibility

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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 11*i* 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 Oracle*MetaLink* 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 Oracle*MetaLink*.
- **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 Oracle*MetaLink*.

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 Implementation Guide

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

Oracle Content Management User 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 User Guide

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

Oracle Field Sales User Guide

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

Oracle TeleSales User Guide

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

Oracle Sales User Guide

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

Oracle Marketing User Guide

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

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.

Oracle*MetaLink*

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>).

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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

Introduction and Overview

This part contains the following chapters:

- [Chapter 1, "Introduction to Oracle Proposals"](#)
- [Chapter 2, "Overview of Using Oracle Proposals"](#)

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 11.5.10 Release"](#)
- [Section 1.3, "Oracle Proposals Key Features"](#)
- [Section 1.4, "Oracle Proposals Integrations"](#)
- [Section 1.5, "What's New"](#)

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.

When utilizing Oracle Proposals, there are three major steps to consider:

- Planning
- Implementation
- Maintenance

1.1.1 Planning

The planning phase involves three major steps:

- Review the proposal
- Identify the components
- Identify the dynamic fields

The user who is the administrator for the company must review the proposal and determine what are the primary and common elements of this and other proposals sent out by the company's sales force. At the highest level, these are components, which exist in every proposal sent out by a sales person. These components will form a template that a designated group of salespeople can use as their basis for creating proposals for their customers. Within each component, the user can also determine if there should be several different versions to use. For example, if the user determines that there is more than one cover letter that can be used, those variations can all be saved under the cover letter component. Also, the user can determine which sections of the component can be personalized. For example, in the cover letter version A, the user determines the potential customer's address and salutation are customizable areas. The user should then mark that this is where dynamic fields should be entered on the RTF file that is created for each component version.

1.1.2 Implementation

Implementation involves doing the following:

- Offline
 - Build content
- Online
 - Register dynamic fields
 - Create template category
 - Create components
 - Create template

- Publish

The implementing phase occurs after the user has determined which components should comprise the template, how many versions of each component should be saved, and where the dynamic fields in each component version should be placed. The user now creates the pieces of information needed in the Proposals application. The user must have administrator responsibility in order to create the template. First, the dynamic fields should be registered that will be inserted into RTF file created for each component version. Refer to [Appendix B, "Dynamic Field Structure in RTF Files"](#) for examples and information on dynamic field creation. The component versions should then be created as RTF files. The user then must create components to which the component versions will be tied to. For instance, Cover Letter version A must be tied to the Cover Letter component. Once the components have been created, the user can then create a template and tie the components to the template. The template must also be assigned to a category, which determines access to that particular template.

1.1.3 Maintenance

The maintenance phase is ongoing once templates have been created and involves the following tasks:

- Translation
- Modification/Deletion
- Publish & Unpublish

As the application is utilized by the company's sales force, the administrator must be sure to make updates to dynamic fields, components, translated versions and template as the sales force's needs change.

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 [OracleMetaLink](#) for relevant product patches and documentation.

1.3 Oracle Proposals Key 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.

1.4 Oracle Proposals Integrations

Listed below is basic information on Oracle Proposals integrations. Please see the *Oracle Proposals Implementation Guide, Release 11i* for 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.

- **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.
- **Oracle Content Manager:** Content Manager is a central repository for all content that is used for storing and using, and reusing RTF files for Proposals. The repository can be accessed either through Oracle Content Manager Folders or through categories in the Oracle Content Manager Library.
- **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.

Oracle Proposals leverages Data Quality Management (DQM), a tool in TCA that can be used to keep data clean by minimizing the creation of duplicate parties. Oracle Proposals utilizes the Party Merge and Account Merge functionalities 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 eTRM* page (ID#164517.1) of *OracleMetalink* for more details.

1.4.2 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:

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

1.5 What's New

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 MetaLink for relevant product patches and documentation.

The following functionality is new in this release:

- Oracle Content Manager integration for storing and reusing files in and from the Oracle Content Manager Library or Oracle Content Manager Folders.
- Advanced custom search capability using Oracle Trading Community Architecture components.
- Integration with Oracle Marketing to associate proposal templates to a campaign schedule.
- Integration with Oracle Field Sales and Oracle Telesales to create proposals from an opportunity or customer.
- Integration with Oracle Sales to view proposals for a customer.
- Integration with Oracle Sales to create proposals from a lead in Self-Service mode.
- Ability to add external files to proposals.
- Ability to specify external file usage for proposals by administrators.
- Enhanced administration flows.
- Two seeded responsibilities available in Self-Service mode that reduce the number of steps for assigning Oracle Proposals responsibility levels.

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, "Logging In to Oracle Proposals"](#)
- [Section 2.2, "Accessing the Oracle Proposals Dashboard User Interface"](#)
- [Section 2.3, "Accessing the Oracle Proposals Administrator Interface"](#)
- [Section 2.4, "Summary of Oracle Proposals Tasks"](#)

2.1 Logging In to Oracle Proposals

There are several ways to log in to Oracle Proposals. Users can access the application through JTF mode or through Self-Service mode.

2.1.1 Logging in to Oracle Proposals through JTF Mode

Prerequisites

Proposal Main Menu or the **Proposal Homepage Function** must be assigned to the Oracle Proposals responsibility. Refer to Section 4.1, "Setting up Users" of the *Oracle Proposals Implementation Guide, Release 11i* for more details. This is assumed for all procedures in the chapters following this one.

Navigation

Navigate to the Oracle CRM Applications login page at:

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

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

Steps

Select the **Proposals** tab to access Oracle Proposals.

2.1.2 Logging in to Oracle Proposals through Self-Service Mode

Responsibilities

Oracle Proposals Administrator or **Oracle Proposals User**. Refer to Section 4.1, "Setting up Users" of the *Oracle Proposals Implementation Guide, Release 11i* for more details. This is assumed for all procedures in the chapters following this one.

Navigation

http://<host>:<apache port>/OA_HTML/<Language code>/ICXINDEX.htm

Your system administrator can give you the values that should replace <host>, <apache port>, and <language code> in this URL.

Steps

Select the appropriate responsibility.

2.2 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 Function** or for those who have the **Oracle Proposals User** responsibility. 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** or have the **Oracle Proposals Administrator** responsibility. Please see Section 4.1, "Setting up Users" of the *Oracle Proposals Implementation Guide, Release 11i* for more details.

Prerequisites

User must be a Resource in JTF Resource Manager, be logged in as a valid Oracle Proposals user, and have the **Proposals Homepage Function** assigned to the responsibility or have the **Oracle Proposals User** responsibility assigned.

Navigation

Oracle Proposals > Dashboard

Field Behavior

After logging in, users see the Dashboard page display with two major sections:

- **Create Proposal** button: takes the user to the **Create Proposal** page. Refer to [Section 5.2, "Creating Proposals"](#) for more details.
- **Search Proposal** button: takes the user to the Proposals Search page. Refer to [Section 4.4, "Search for Proposals"](#) for more details.
- **Recent Proposals**: recently viewed, created or modified proposals. Clicking the **Full List** button will display the full list of all recent proposals.
- **Due within "X" days**: proposals due within a number of days as specified in the **PRP: Proposals Due Within "X" Days** profile option. See Appendix A.4.5, "PRP: Proposals Due Within 'X' Days" of the *Oracle Proposals Implementation Guide, Release 11i*. Clicking the **Full List** button will display the full list of all recent proposals.

2.3 Accessing the Oracle Proposals Administrator Interface

Navigation

Oracle Proposals > Administration

Prerequisites

Users must be logged in as a valid Oracle Proposals user **and** have the **Proposals Main Menu** assigned to the responsibility or have the **Oracle Proposals Administrator** responsibility assigned.

Field Behavior

After logging in, 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 Detail** page.
- 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.

2.4 Summary of Oracle Proposals Tasks

Use Oracle Proposals to perform the following tasks:

- [Chapter 3, "Administering Oracle Proposals"](#)
- [Chapter 5, "Creating and Deleting Proposals"](#)
- [Chapter 6, "Personalizing Proposal Content"](#)
- [Chapter 7, "Generating and Working with Proposal Versions"](#)
- [Chapter 4, "Accessing Proposals from the Dashboard"](#)

2.4.1 Administrator Proposal Creation Overview

The following table shows the proposal creation process for an administrator.

Table 2–1 Administrator - Creating Proposals Overview⁵

Step/ Sequence	Task
1	Determine and create dynamic fields for areas of personalization in RTF files.
2	Write content and register dynamic fields in RTF files.
3	Create components.
4	Create template.

Step/ Sequence	Task
5	Publish template.
6	Initiate proposal creation.
7	Select template.
8	Provide the following: <ul style="list-style-type: none"> ■ Proposal Name ■ Customer Name - Search for customer. Customer name defaults from quote, opportunity or customer if proposal is created from one of those modules. ■ Due Date ■ Contact (if the customer is an organization)
9	Create proposal.
10	Verify proposal is created successfully. Display confirmation message.
11	Verify/modify proposal components, their content and order, if needed.

2.4.2 User Proposal Creation Overview

The following table shows the proposal creation process for a standard user.

Table 2–2 User - Creating Proposals Overview

Step/ Sequence	Task
1	Initiate proposal creation.
2	Select Template.
3	Provide the following: <ul style="list-style-type: none"> ■ Proposal Name ■ Customer Name - Search for customer. Customer name defaults from quote, opportunity, or customer if proposal is created from one of those modules. ■ Due Date ■ Contact (if the customer is an organization)
4	Create proposal

Step/ Sequence	Task
5	Verify proposal is created successfully. Check confirmation message.
6	Verify/modify proposal components, and their content and order, if needed.

2.4.3 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 assistance and information.

Part II

User Procedures

This part contains the following chapters:

- [Chapter 3, "Administering Oracle Proposals"](#)
- [Chapter 4, "Accessing Proposals from the Dashboard"](#)
- [Chapter 5, "Creating and Deleting Proposals"](#)
- [Chapter 6, "Personalizing Proposal Content"](#)
- [Chapter 7, "Generating and Working with Proposal Versions"](#)

Administering Oracle Proposals

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

- Template categories
- Templates
- Components
- Dynamic fields (optional)

Only those users whose responsibility has been assigned the **Proposal Main Menu**, or have the **Oracle Proposals Administrator** responsibility, are able to perform the tasks outlined in this chapter.

This chapter is organized into the following sections:

- [Section 3.1, "Administering Template Categories"](#)
- [Section 3.2, "Administering Quoting and Proposals Dynamic Fields"](#)
- [Section 3.3, "Administering User Defined Dynamic Fields"](#)
- [Section 3.4, "Administering Proposal Components"](#)
- [Section 3.5, "Administering Proposal Templates"](#)
- [Section 3.6, "Administering Proposal Templates from Campaign Schedules"](#)
- [Section 3.7, "RTF Files Overview"](#)
- [Section 3.8, "Other Administrative Tasks"](#)

3.1 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:

- [Section 3.1.1, "Viewing Template Categories"](#)
- [Section 3.1.2, "Creating Template Categories"](#)
- [Section 3.1.3, "Modifying Template Category Details"](#)
- [Section 3.1.4, "Deleting Template Categories"](#)

3.1.1 Viewing Template Categories

To view template categories:

Navigation

Oracle Proposals > Administration > Other Setup > Template Category > Template Categories page > Template Category Name hyperlink > Template Category Detail page

Field Behavior

- **Code:** Auto-populated and is read-only. Not exposed to the proposal creator.
- **Name:** The name of the template category
- **Description:** Description of the template category.

3.1.2 Creating Template Categories

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

To create template categories:

Navigation

Oracle Proposals > Administration > Other Setup > Template Category > Template Categories page > Create Template Category button

Steps

1. Enter a template category name.

2. Optionally, enter a template category description.
3. Select **Apply** to complete the creation process.

Notes

A unique numeric code for the category is generated after you have entered all the fields in the **Create Template Category Detail** page. The code is not exposed to proposal creators.

3.1.3 Modifying Template Category Details

To modify template categories:

Navigation

Oracle Proposals > Administration > Other Setup > Template Category > Template Categories page > Template Category Name hyperlink > Template Category Detail page

Steps

1. The relevant **Template Category Detail** page appears, displaying the category code, name, and description. Make any changes you wish to the name or description.
2. Select **Apply**.

3.1.4 Deleting Template Categories

Template categories can only be deleted if they are **not** in use. A template category is in use if any template references it.

To delete template categories:

Navigation

Oracle Proposals > Administration > Other Setup > Template Category > Template Categories page

Steps

Template categories can be deleted in either one of the following ways:

- On the **Template Categories** 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.
or
- Select the hyperlink in the **Name** column for the category to be deleted. The relevant **Template Category Detail** page appears. Select **Delete**. This button is enabled only if the category is **not** in use.

3.2 Administering Quoting and Proposals Dynamic Fields

Dynamic fields are placeholders for text information that are used in standard boilerplate RTF files and are substituted with information specified during proposal creation.

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 information related to Oracle Quoting and Oracle Proposals. 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 objects within Oracle's eBusiness Suite are exposed as dynamic fields. For a list of seeded dynamic fields, please see [Appendix A, "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. Refer to [Section 3.3.2.3, "Creating Java Program Dynamic Fields"](#) for more details.

Note: 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:

- [Section 3.2.1, "Viewing Quote Dynamic Fields"](#)
- [Section 3.2.2, "Viewing Proposal Dynamic Fields"](#)

3.2.1 Viewing Quote Dynamic Fields

Oracle Proposals exposes quote attributes as seeded dynamic fields. Administrators can insert these fields in the RTF files. Seeded Oracle Quoting dynamic fields include those for items, pricing, customers, product category, charges, attachments, terms and conditions, and tax information. For a full list of seeded Oracle Quoting dynamic fields, please see [Appendix A, "Seed Data"](#).

To view quote dynamic fields:

Navigation

Oracle Proposals > Administration > Dynamic Fields > Quote > Dynamic Fields:
Quote page

Field Behavior

RTF Display: shows the name of the dynamic field as it must appear 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 file.

Notes

Oracle Contracts is a conditional dependency for Oracle Proposals if being pulled in as a part of a quote through Oracle Quoting. If Oracle Contracts is enabled, Oracle Proposals does not support table tokens in Contracts templates. Refer to [Section 2.3, "Oracle Proposals Conditional Dependencies"](#) of the *Oracle Proposals Implementation Guide, Release 11i*, for more details.

3.2.2 Viewing Proposal Dynamic Fields

Oracle Proposals dynamic fields are seeded in the application. For a full list of seeded Oracle Proposals dynamic fields, please see [Appendix A, "Seed Data"](#).

To view Oracle Proposals dynamic fields:

Navigation

Oracle Proposals > Administration > Dynamic Fields > Proposals > Dynamic Fields: Proposal page

Field Behavior

RTF Display: shows the name of the dynamic field 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 file.

3.3 Administering User Defined Dynamic Fields

Dynamic fields can be created anytime, but must exist before an RTF file, to which the dynamic field will be inserted, does. 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 list that will be displayed in the proposal creation UI. Users can only pick from the drop-down values defined by the administrator.
- **Java program dynamic fields:** The Oracle Proposals administrator insert a Java code program that pulls in data from a repository outside of Oracle Applications.

This section includes the following tasks:

- [Section 3.3.1, "Viewing User-Defined Dynamic Fields"](#)
- [Section 3.3.2, "Creating User Defined Dynamic Fields"](#)
- [Section 3.3.3, "Inserting Dynamic Fields in RTF Files"](#)
- [Section 3.3.4, "Editing Dynamic Fields"](#)

- [Section 3.3.5, "Deleting Dynamic Fields"](#)

Please review the information in [Appendix B, "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.

3.3.1 Viewing User-Defined Dynamic Fields

To view user-defined dynamic fields:

Navigation

Oracle Proposals > Administration > Dynamic Fields > User Defined > Dynamic Fields: User Defined page > Dynamic Field Name hyperlink > Dynamic Field Details page

3.3.2 Creating User Defined Dynamic Fields

To create user defined dynamic fields:

Navigation

Oracle Proposals > Administration > Dynamic Fields > User Defined > Dynamic Fields: User Defined page > Create Dynamic Field button > Create Dynamic Field: General Details page

Steps

1. Create a dynamic field code by entering a unique alphanumeric code in this text field. This code is not translatable and cannot exceed 10 unicode characters.

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

2. Enter a name for the dynamic field.
3. Optionally, enter a description for the dynamic field.
4. Choose the type of dynamic field from the drop-down menu: text, drop-down, or Java program. There are three types of user defined dynamic fields: **text**,

drop-down, and **Java program**. Based on which type of dynamic field you are creating, refer to:

- [Section 3.3.2.1, "Creating Text Dynamic Fields"](#) if you are creating a text dynamic field.
- [Section 3.3.2.2, "Creating Drop-down Dynamic Fields"](#) if you are creating a drop-down dynamic field.
- [Section 3.3.2.3, "Creating Java Program Dynamic Fields"](#) if you are creating a Java program dynamic field.

3.3.2.1 Creating Text Dynamic Fields

To create text dynamic fields:

Navigation

Oracle Proposals > Administration > Dynamic Fields > User Defined > Dynamic Fields: User Defined page > Create Dynamic Field button > Create Dynamic Field: General Details page

Steps

1. When you select **Field Type** as **Text** from the **Create Dynamic Field: General Details** page, you are taken to the **Create (Text) Dynamic Field: Field Value** page. This page lists the **Field Type**, **Data Type**, and **Maximum Display Length** fields.
2. 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.
3. 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.
4. If your **Data Type** 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 text field. Any decimal values entered will be rounded.

3.3.2.2 Creating Drop-down Dynamic Fields

To create drop-down dynamic fields:

Navigation

Oracle Proposals > Administration > Dynamic Fields > User Defined > Dynamic Fields: User Defined page > Create Dynamic Field button > Create Dynamic Field: General Details page

Steps

1. When you select the field type as **Drop-down** from the **Create Dynamic Field: General Details** page, you are taken to the **Create Dynamic Field: Field Value** page.
2. 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.
3. Enter a drop-down display value.
4. Select **Add Row** to enter multiple values.
5. To delete any of the values entered, select the delete icon in the **Delete** column. You should have at least one remaining value specified.

3.3.2.3 Creating Java Program Dynamic Fields

Users can write their own Java programs and register them as dynamic fields with Oracle Proposals. Users will typically do this to get data into the generated proposal version from a repository outside of Oracle Applications or from one within Oracle Applications.

Users' Java program method must take `Hashtable` as the input parameter and return `String`. Users must register this Java program method as a dynamic field in Oracle Proposals' administration screen.

When Oracle Proposals calls the registered Java program while generating the proposal, it will pass `proposalId` and `oaDbTransaction` as hashtable elements. The Java program can make use of these elements to process its business logic and return a string that will be used in the generated proposal.

To create Java program dynamic fields:

Navigation

Oracle Proposals > Administration > Dynamic Fields > User Defined > Dynamic Fields: User Defined page > Create Dynamic Field button > Create Dynamic Field: General Details page

Steps

1. When you select **Field Type** as **Java Program** from the **Create Dynamic Field: General Details** page, you are taken to the **Create Dynamic Field: Field Value** page.
2. 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. Any translations of value must be handled within a single program. The Java file should already exist and be in `CLASSPATH`.

Notes

Consult [Appendix C, "Creating Java Program Dynamic Fields"](#), for more information on creating Java program dynamic fields.

3.3.3 Inserting Dynamic Fields in RTF Files

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:

Navigation

Open your RTF file requiring dynamic field insertion in a third party word processing tool.

Steps

1. Place your cursor in the exact position within the content 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.

Notes

There cannot be any spaces between the dynamic field code and the <@ or colon (:). Refer to [Section 3.7.1, "Creating RTF Files Guidelines"](#) for more examples of valid formats.

3.3.4 Editing Dynamic Fields

The following dynamic field attributes are editable at any time:

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

The following dynamic field attributes are editable only if not in use (dynamic fields are in use when and RTF file references them):

- **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:

Navigation

Oracle Proposals > Administration > Dynamic Fields > User Defined > Dynamic Fields: User Defined page > Dynamic Field Name hyperlink > Dynamic Field Detail Page

Steps

In the **Dynamic Field Detail** page, make any revisions you wish to.

Notes

You cannot change the dynamic field code.

3.3.5 Deleting Dynamic Fields

Seeded dynamic fields cannot be deleted. User defined dynamic fields that are not in use can be deleted. Dynamic fields are in use if a component's file references

them. Drop-down dynamic field values cannot be deleted if they are in use in a proposal. Dynamic fields are in use when an RTF file references them

To delete dynamic fields:

Navigation

Oracle Proposals > Administration > Dynamic Fields > User Defined > Dynamic Fields: User Defined page

Steps

User defined dynamic fields that are not in use can be deleted in two ways:

- 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, otherwise it is disabled.

Or:

- Select the hyperlink in the **Name** 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.

3.4 Administering Proposal Components

Components help administrators divide their proposal content into independent elements, which can then be reused 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, Data Sheet, etc.

A component can contain multiple files. For example, a component named *Cover Letter* can contain several types of cover letter files such as *Cover Letter - Simple*, *Cover Letter - Expanded*, etc. Each file 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 file is a separate RTF file that represents a style type for the component.

The RTF files contain dynamic fields. During the component creation process, their corresponding files are associated with RTF files. The RTF files need to be uploaded to the component.

When a component is created, it is created in all of the installed languages. For example, if English and Spanish are the installed languages, and you need to create two different versions of a cover letter, you could create the following two files:

- *Cover Letter Simple*
- *Cover Letter Expanded*

Then associate two RTF files for each type of cover letter, one RTF file being in English and one being in Spanish:

- *Cover Letter Simple (English version)*
- *Cover Letter Simple (Spanish version)*
- *Cover Letter Expanded (English version)*
- *Cover Letter Expanded (Spanish version)*

Then you translate the file name appropriate to the language (the code is not translatable). For more information, see [Section 3.5.1, "Multi-Language Functionality"](#).

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 latest 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:

- [Section 3.4.1, "Viewing Components"](#)
- [Section 3.4.2, "Creating Proposal Components"](#)
- [Section 3.4.3, "Editing Components"](#)
- [Section 3.4.4, "Deleting Components"](#)

3.4.1 Viewing Components

To view components:

Navigation

Oracle Proposals > Administration > Components > Component Name hyperlink > Component Detail page

3.4.2 Creating Proposal Components

Proposal components are pieces of standard content that are included in templates, such as cover letters and data sheets. Administrators can define components and create multiple files for each component. For example, the component *Cover Letter* can include the files *Simple Cover Letter* and *Professional Cover Letter*.

Components are created and then individual RTF file are associated to them. You can associate files from you desktop, and if the **PRP: Use Oracle Content Manager** profile options is set to **Yes** or **Optional**, you can also associate files from the Oracle Content Manager Folders or Library. In all three flows the administrator will select the file and associate to a component. Only RTF file types can be added to a component. The files will be parsed and validated before being added.

Note: Files are parsed to check for all valid dynamic fields and RTF construction.

To create proposal template components:

Navigation

Oracle Proposals > Administration > Components > Components page > Create Component button > Quick Create Proposal Component page

Steps

You can create proposal components by adding files from the desktop, from Oracle Content Manager Folders, or from Oracle Content Manager Library. You can only add files from the Oracle Content Manager Library or Oracle Content Manager Folders if your system administrator has set the **PRP: Use Oracle Content Manager** profile option to **Yes** or **Optional**. Refer to the following sections for adding files:

- [Section 3.4.2.1, "Adding Files from the Desktop \(With Oracle Content Manager Disabled\)"](#)
- [Section 3.4.2.2, "Adding Files from the Desktop \(With Oracle Content Manager Enabled\)"](#)
- [Section 3.4.2.3, "Adding Files from the Oracle Content Manager Library"](#)

- [Section 3.4.2.4, "Adding Files from the Oracle Content Manager Folders"](#)

If you experience any problems when associating files, please see Appendix C, "Dynamic Field Structure in RTF Files" of the *Oracle Proposals Implementation Guide, Release 11i*.

The file must be in the current language. To associate a file for a different language, change the session language and select the component and associate file.

3.4.2.1 Adding Files from the Desktop (With Oracle Content Manager Disabled)

Administrators can upload files from their desktop into their proposal.

To add files from the desktop with Oracle Content Manager disabled:

Navigation

Oracle Proposals > Administration > Components > Components page > Create Component button

Steps

You can create a component using the **Quick Create Proposal Component** page or by selecting the **Advance Create** button to access the **Advance Create Proposal Component** page. **Quick Create** allows for component creation with one file, while **Advance Create** allows component creation with multiple files.

From the Quick Create Proposal Component page:

1. Enter a component name.
2. Optionally, enter a component description.

From the Advance Create Proposal Component page:

1. From the **Quick Create Proposal Component** page, select the **Advance Create** button.
2. Enter a component name.
3. Optionally, enter a component description.
4. In the **Alternate files for this component** section, select the **Add Alternate File** button. The **Advanced Create Component: Add File: Desktop** page appears.
5. Enter a file name in the **File** text search field or browse your desktop for one by selecting the **Browse** button.
6. Optionally, enter a name for the file.

Continuing Steps for both pages:

1. **Add File: Desktop** appears as a section of the **Quick Create Proposal Component Page** and appears as the **Advance Create Proposal Component: Add File: Desktop** page. In this section/page, search for a file by selecting the **Browse** button beside the **File** field. Optionally give a name to the file in the **Name** field. Otherwise, the file name will be used.

3.4.2.2 Adding Files from the Desktop (With Oracle Content Manager Enabled)

Administrators can upload files from their desktop into their proposal.

To add files from the desktop with Oracle Content Manager enabled:

Navigation

Oracle Proposals > Administration > Components > Components page > Create Component button

Steps

1. Follow the steps in [Section 3.4.2.1, "Adding Files from the Desktop \(With Oracle Content Manager Disabled\)"](#).
2. Depending on the settings for the **PRP: Use Oracle Content Manager** profile option, you may see additional fields after the **Name** field:
 - If the profile option is set to **No**, you will not see any additional fields.
 - If the profile option is set to **Yes**, an additional section called **Content Manager Folder** appears. If the user does not have access to a folder in Oracle Content Manager, the user will have to create a folder first. In Oracle Content Manager access, or permissions, is given at the folder level. Access to the folder can be given at the user level, group level, responsibility level, or can be granted to the public (i.e. all users).
 - If the profile option is set to **Optional**, the drop-down field, **Save in Content Manager**, appears under the **Name** field. You can select **No** or **Yes** from the drop-down LOV. **No** is the default selection. If you select **Yes**, the **Content Manager Folder** section appears. The default folder to store files is the seeded administrator folder.

Since administrators will have the need to share files on a regular basis, all Oracle Proposals administrators should be given access to the seeded folder. Administrators can also save files in other folders. Refer to [Appendix D, "Permissions for Oracle Content Manager"](#) to see the

necessary permissions needed to upload a file from the desktop to Oracle Content Manager Folders. An Oracle Content Manager administrator will have to give access for the Oracle Proposals administrator to the folder at implementation time.

3. If the profile option is set to **Yes** or **Optional**, and you have chosen **Yes** in the **Save in Content Manager** field, you can save the file in Content Manager, allowing you to reuse the file later for other components. In this section, you can choose the root default folder, or choose another folder if you have been given access to it by the administrator. You can save the file to Oracle Content Manager in several different ways:
 - Create a folder in Oracle Content Manager to save the file in by selecting the **Create Folder** button.

Or:

 - Choose an existing folder in Oracle Content Manager if you have been given access to it by the administrator by selecting the flashlight icon. You can view the content of the chosen folder by selecting the **View Folder** button.

Every time a file is uploaded, a new content item will be created within Oracle Content Manager. If the content item already exists, user will have to create a unique name for the file to be stored. All files will programmatically be stored as approved, live, and in the user's session language in Oracle Content Manager.

3.4.2.3 Adding Files from the Oracle Content Manager Library

If your system administrator has set the **PRP: Use Oracle Content Manager** profile option to **Yes** or **Optional**, administrators in Oracle Proposals are able to add files from the Oracle Content Manager Library, a repository where Oracle Content Manager users can publish content to certain categories that have been set up by an administrator.

The administrator will be able to browse the categories of the Library or perform a keyword search in the categories that the user has permission.

Oracle Proposals will only use files in Oracle Content Manager that are of RTF type, that are live, are approved, and are in the user's session language. Only content items that have these attributes will be displayed to the user in the Library and in the folders (following flow).

To add files from the Oracle Content Manager Library:

Navigation

Oracle Proposals >Administration > Components >Components page > Create Component button > Quick Create Proposal Component page >

Steps

1. There are two ways to access the **Add File from Library** functionality:
 - From the **Quick Create Proposal Component** page, enter a name in the **Component Name** field.
Or:
 - From the **Quick Create Proposal Component** page, select the **Advance Create** button, and enter a component name in the **Component Name** field on the **Advance Create Proposal Component** page. Then select the **Add Alternate File** button.
2. From the **Alternate Content Sources** bin, select **Add File: Library**.
3. You can search for a file from the Oracle Content Manager Library in several ways:
 - Search for the file by entering the first few characters of the file name in the **Search** field and selecting **Go**. A **Results** table displays, showing matching files based on the search.
 - Search for the file by selecting **Advanced Search** beside the **Search** field. Advanced Search functionality allows you to search on the file name, keywords, description, category, owner, and content type. Search for the file by entering the first few characters of the search parameter and using the drop-down LOV beside each search parameter to specify the type of search condition. The types of search conditions are: **Contains**, **Ends With**, **Is**, and **Starts With**. Select **Go**, and a **Results** table displays, showing matching files based on the search.

Note: By selecting a content type, the **Attribute** section will refresh to display additional fields that the user can search by for that content type.

- Browse the Oracle Content Manager Library categories for which you have permissions in Oracle Content Manager. Select category names to view the contents. You can also select the **Focus** icon beside each category to view

only that category and files of RTF format within that category. Select the radio button beside the file you want and then click **Apply**.

Optionally, you can go directly to the root category by selecting the **Navigate to Root Category** hyperlink.

3.4.2.4 Adding Files from the Oracle Content Manager Folders

If your system administrator has set the **PRP: Use Oracle Content Manager** profile option to **Yes** or **Optional**, administrators in Oracle Proposals are able to add files from the Oracle Content Manager Folders, a repository where Oracle Content Manager users can publish content to certain folders that have been setup by an administrator.

The administrator will be able to browse the folders or perform a keyword search in the folders that the user has permission.

Oracle Proposals will only use files in Oracle Content Manager that are of RTF type, that are live, are approved, and are in the user's session language. Only content items that have these attributes will be displayed to the user in the folders.

To add files from Oracle Content Manager Folders:

Navigation

Oracle Proposals > Administration > Components > Components page > Create Component button > Quick Create Proposal Component page

Steps

1. There are two ways to access the **Add File from Folder** functionality:
 - From the **Quick Create Proposal Component** page, enter a name in the **Component Name** field.Or:
 - From the **Quick Create Proposal Component** page, select the **Advance Create** button, and enter a component name in the **Component Name** field on the **Advance Create Proposal Component** page. Then select the **Add Alternate File** button.
2. From the **Alternate Content Sources** bin, select **Add File from Folder**.
3. You can search for a file from the Oracle Content Manager Folders in several ways:

- Search for the file by entering the first few characters of the file name in the **Search** field and selecting **Go**. A **Results** table displays, showing matching files based on the search.
- Search for the file by selecting **Advanced Search** beside the **Search** field. Advanced Search functionality allows you to search on the file name, keywords, description, folder, owner, and content type. Search for the file by entering the first few characters of the search parameter and using the drop-down LOV beside each search parameter to specify the type of search. The types of search are: **Contains**, **Ends With**, **Is**, and **Starts With**. Select **Go**, and a **Results** table displays, showing matching files based on the search.

Note: By selecting a content type, the **Attribute** section will refresh to display additional fields that the user can search by for that content type.

- Browse the Oracle Content Manager Folders for which you have permissions in Oracle Content Manager. Select folder names to view the contents. You can also select the **Focus** icon beside each folder to view only that folder and files of RTF type located within that folder. Select the radio button beside the file you want and then click **Apply**.

Optionally, you can go directly to the root folder by selecting the **Navigate to Root Folder** hyperlink.

3.4.3 Editing Components

The following can be done at any time:

- Editing component name, component description, or file name
- Adding files
- Deleting files
- Associating alternate versions of a component
- Previewing files

To edit proposal components:

Navigation

Oracle Proposals > Administration > Components page > Component Name hyperlink > Component Detail page

Steps

The following fields are editable:

- **Component Name:** The component name.
- **Description:** The component description.
- **File Name:** The name of the file.

3.4.3.1 Adding Alternate Files to Components

To add more files to an existing component:

Navigation

Oracle Proposals > Administration > Component > Components page > Component Name hyperlink > Component Detail page > Add Alternate File button

Steps

You can add files in the same way you upload files for a component from the desktop, Oracle Content Manager Library, and Oracle Content Manager Folders. Refer to [Section 3.4.2, "Creating Proposal Components"](#) for more information.

3.4.3.2 Deleting Files from Components

Deleting a file in Oracle Proposals means that it is completely erased from the database. When a file that is stored in Oracle Content Manager is deleted, the file still exists for possible reuse, while the association to the file is deleted.

To delete a file from a component:

Navigation

Oracle Proposals > Administration > Component > Components page > Component Name hyperlink > Component Detail page > Alternate Files for this component section

Steps

Select the delete icon on the line where the file you wish to delete is located.

3.4.3.3 Associating Versions of a File

You can associate a new version of a file by uploading it from several locations:

- From your desktop
- From Oracle Content Manager - if your file is from Oracle Content Manager, you can select a newer, live version from here.

To associate a version of a file:

Navigation

Oracle Proposals > Administration > Component > Components page > Component Name hyperlink > Component Detail page > Associate Version icon

Steps

Select the **Associate Version** icon on the line of the file you wish to associate another version is located. If the original file was added from an Oracle Content Manager Folder or from the Oracle Content Manager Library, you will have the option of selecting a new version from Oracle Content Manager if one exists. Otherwise you can upload a version residing on your desktop.

3.4.4 Deleting Components

To delete components:

Navigation

Oracle Proposals > Administration > Components > Components page

Steps

You can delete components in either of the following ways:

- Select the hyperlink in the **Name** column for the component you want to delete. The **Component Detail** page appears. Select **Delete**. This permanently deletes the component and all its associated files. It cannot be undone later.

Or:

- Select the **Delete** icon in the **Delete** column for the component you want to delete. This permanently deletes the component and all its associated files. It cannot be undone later.

You **cannot** delete components that are in use in a proposal. Components included in proposals or templates are considered in use.

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.
- Make some components mandatory.
- Allow external files to be added to proposals.
- Specify the default file if there are multiple files for a component.

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:

- [Section 3.5.1, "Multi-Language Functionality"](#)
- [Section 3.5.2, "Creating Proposal Templates"](#)
- [Section 3.5.3, "Viewing Proposal Templates"](#)
- [Section 3.5.4, "Editing Proposal Templates"](#)
- [Section 3.5.5, "Editing Proposal Template Name, Description, and Category"](#)
- [Section 3.5.6, "Allowing Users to Add External Files to Proposals Created From the Proposal Template"](#)
- [Section 3.5.7, "Adding Components to Proposal Templates"](#)
- [Section 3.5.8, "Removing Components from Proposal Templates"](#)
- [Section 3.5.9, "Changing Component Order in Proposal Templates"](#)
- [Section 3.5.10, "Publishing Proposal Templates"](#)
- [Section 3.5.11, "Unpublishing Proposal Templates"](#)
- [Section 3.5.12, "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 files 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 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 components' 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 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:

Navigation

Oracle Proposals > Administration > Templates > Templates page > Create Template button > Create Proposal Template page

Steps

1. Enter a name for the template in the **Name** field.

2. Optionally, enter a description in the **Description** field.
3. Select a category from the **Category** drop-down box.
4. In the **Personalization** section, select the checkbox if you want other users to be able to add files to proposals created from this template.
5. In the **Components** section, select the **Create New Component** button if you want to create a new component and associate it with this template. You are taken to the **Quick Create Proposal Component** page. You can add files from the desktop, or if your system administrator has set the **PRP: Oracle Content Manager** profile option to **Yes** or **Optional**, you can add files from Oracle Content Manager's Folders or Library. Refer to the appropriate section for adding files to your component:
 - [Section 3.4.2.1, "Adding Files from the Desktop \(With Oracle Content Manager Disabled\)"](#)
 - [Section 3.4.2.3, "Adding Files from the Oracle Content Manager Library"](#)
 - [Section 3.4.2.4, "Adding Files from the Oracle Content Manager Folders"](#)
6. Optionally, you can associate existing components to the template. If you are associating existing components, select the **Associate Existing Components** button. In the **Search and Select: Proposal Component** page, select a component by using the checkbox in the **Select** column, then choose **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. For each component, specify the following attributes:
 - **Mandatory:** Users cannot exclude mandatory components from their proposals
 - **Default Document:** A component can have multiple files (see Components section for more details). You can specify a default file that is selected when users pick this template
7. Specify component order by selecting the **Change Order** button in the **Components** section of the **Create Proposal Template** page.
8. Select the **Preview** button to open or download a preview of the template before it is published.
9. After creating the templates, you need to publish this template in each language to make it available.

3.5.3 Viewing Proposal Templates

To view proposal templates:

Navigation

Oracle Proposals > Administration > Templates > Templates page

Steps

1. To view template details, select the hyperlink in the **Name** column.
2. To reorder the template display, click on the column head by which you wish to sort the templates.

Notes

The **Delete** column displays delete icon if template is not in use. Otherwise the delete icon is disabled. A template is in use if it is being utilized by a proposal.

3.5.4 Editing Proposal Templates

The following template elements are editable at any time:

- Template Name
- Template Description
- Template Category
- Component Order
- External file addition for proposals created from the template
- Component addition
- Component removal

Note: A template code is never editable.

3.5.5 Editing Proposal Template Name, Description, and Category

To edit the template name, description or category:

Navigation

Oracle Proposals > Administration > Templates > Templates page > Template Name hyperlink > Template Detail page

Steps

1. For name or description changes, enter the new name or description in the **Name** or **Description** fields.
2. To change **Category**, use the drop-down box to select a new value.

3.5.6 Allowing Users to Add External Files to Proposals Created From the Proposal Template

The administrator has the option to specify whether users can add external files to proposals created from the template.

To allow users to add external files:

Navigation

Oracle Proposals > Administration > Templates > Templates page > Template name hyperlink > Template Detail page > Personalization section

Steps

1. Select the checkbox beside **Users can add files to proposals created from this template**.
2. The change is reflected immediately for all proposals using this template.

3.5.7 Adding Components to Proposal Templates

Components can only be added if the template is unpublished in all languages. To add components to a published template, unpublish it in all languages first.

To add components in a template:

Navigation

Oracle Proposals > Administration > Templates > Templates page > Template Name hyperlink > Template Detail page > Components section > Add Components button

Steps

1. Search for a component by searching for it 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.
2. Select a component by using the checkbox in the **Select** column, then choose **Select**. Use **Select All** if all components displayed are to be included in this template. After making a selection, the **Template Detail** page appears, displaying the component information in table format.
3. For each component, specify the following attributes:
 - a. **Mandatory:** Users cannot exclude mandatory components from their proposals. Select the **Mandatory** checkbox for components requiring that status.
 - b. **Default Document:** A component can have multiple files (see Components section for more details). You can specify a default file that is selected when users pick this template. Select the flashlight icon in the **Default Document** column. The **Search and Select: Default Document** page appears. Search for the file, select it, then press **Select**. Alternatively, use the **Quick Select** icon to automatically insert the document in the **Template Detail** page and close the **Search and Select: Default Document** page.
4. This change will be reflected in all new proposals created using this template. Existing proposals are unaffected.

3.5.8 Removing Components from Proposal Templates

Components can only be deleted from unpublished templates. To delete components from a published template, unpublish it in all languages first.

To remove components from a template:

Navigation

Oracle Proposals > Administration > Templates > Templates page > Template Name hyperlink > Template Detail page > Components section

Steps

1. Select the **Remove** icon in the row of the component you want to delete to remove the component from the template.

2. A warning page appears, asking you to confirm whether you want to remove the component. Select **Yes** to continue with the operation, or select **No** to cancel the operation.

Notes

After you have removed the component, this change is reflected only for new proposals. Proposals already using this template will not be affected by this change.

3.5.9 Changing Component Order in Proposal Templates

To change component order in a template:

Navigation

Oracle Proposals > Administration > Templates > Templates page > Template Name hyperlink > Template Detail page > Components section > Change Order button > Change Order: Component page

Steps

Select a component name and change the order of the components by using the Up or Down arrows.

Notes

Proposals already using this template will not be affected by this change, while new proposals using this template will show the component order change.

3.5.9.1 Changing Default Document and Mandatory Attributes

Changes to default files can **only** be made if the template is unpublished. If a change needs to be made to a default file 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:

Navigation

Oracle Proposals > Administration > Templates > Templates page > Template Name hyperlink > Template Detail page > Components section

Steps

1. Select the **Mandatory** checkbox for components requiring that status. Users cannot exclude mandatory components from their proposals.

2. In the **Default Document** column, change the **Default Document** value by selecting the flashlight icon. The **Search and Select: Default Document** page appears. Search for the file, select it, then press **Select**. Alternatively, use the **Quick Select** icon to automatically insert the document in the **Template Detail** page and close the **Search and Select: Default Document** page.

3.5.10 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 in a language when all components have an associated file for the default file in that language.

To publish proposal templates:

Navigation

Oracle Proposals > Administration > Templates > Templates page > Template Name hyperlink > Template Detail page > Components section > Publish in Current Language button

Steps

After selecting the **Publish in Current Language** button, 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.

Notes

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

3.5.11 Unpublishing Proposal Templates

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

To unpublish templates:

Navigation

Oracle Proposals > Administration > Templates > Templates page > Template Name hyperlink > Template Detail page > Unpublish in Current Language button

Steps

Select **Unpublish in Current Language** to unpublish the template. 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. If the **Unpublish in Current Language** button is disabled, the template is not published.

3.5.12 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.

To delete proposal templates:

Navigation

Oracle Proposals > Administration > Templates > Templates page

Steps

Templates can be deleted in one of two ways:

- Select the **Delete** icon for the template you want to delete.
Or:
- Select the hyperlink in the **Name** column for the template you want to delete. The Template Detail page appears. Select **Delete**.

3.6 Administering Proposal Templates from Campaign Schedules

This section includes the following tasks:

- [Section 3.6.1, "Viewing Proposal Templates Associated to Campaign Schedules"](#)
- [Section 3.6.2, "Associating Proposal Templates in Campaign Schedules"](#)
- [Section 3.6.3, "Deleting Proposal Templates Associated to Campaign Schedules"](#)

- [Section 3.6.4, "Unpublishing Proposal Templates Associated to Campaign Schedules"](#)

In order to perform the procedures listed in this section, you must log into the Campaign Schedule Workbench under Oracle Applications' Self-Service mode. Consult the *Oracle Marketing User Guide, Release 11i*, and the *Oracle Marketing Implementation Guide, Release 11i*, for more information.

3.6.1 Viewing Proposal Templates Associated to Campaign Schedules

You can view any existing proposal templates that are associated to a campaign schedule.

To view proposal templates that are associated to a campaign schedule:

Prerequisites

Log into Self-Service mode.

Campaign Workbench Super User responsibility.

Navigation

Self-Service Login > Campaign Dashboard > Campaign Workbench > Shortcuts section > Schedules List hyperlink > Schedules List page

Steps

1. In the **Schedules List** page, select a schedule from the **View** LOV, and then select **Go**.
2. Select the appropriate schedule name.
3. In the **Schedule Details** page, select the **Collaboration** sub-tab.
4. You can view any associate proposal templates in the table, which are listed as **Proposal** in the **Type** column.
5. Preview the proposal template by selecting the **Preview** icon in that row.

3.6.2 Associating Proposal Templates in Campaign Schedules

Campaign schedules, when executed, may become opportunities. Campaign managers can associate proposal templates which can later be used by the sales representative when working on an opportunity created from the campaign. Users can publish and associate a template with a campaign schedule.

To associate proposal templates in a campaign schedule:

Prerequisites

Log into Self-Service mode.

Campaign Workbench Super User responsibility.

Navigation

Self-Service Login > Campaign Dashboard > Campaign Workbench > Shortcuts section > Schedules List hyperlink > Schedules List page

Steps

1. In the **Schedules List** page, select a schedule from the **View** LOV, and then select **Go**.
2. Select the appropriate schedule name.
3. In the **Schedule Details** page, select the **Collaboration** sub-tab.
4. Select **Add Another Row**.
5. In the **Type** column, select **Proposal** from the LOV.
6. In the **Name** column, select the flashlight icon to access the **Search and Select: Proposal Template** page. From here, users can search for a proposal template by name or by category.
7. In the **Search and Select: Proposal Template** page, select either **Name** or **Category** from the LOV. Enter a value in the search field next to it and select **Go**.
8. In the **Results** table, choose a proposal template by selecting **Select** in that row, or use the **Quick Select** icon to automatically insert the selection in the **Schedule Details** page and close the **Search and Select: Proposal Template** page.

3.6.3 Deleting Proposal Templates Associated to Campaign Schedules

Deleting proposal templates in Oracle Proposals that are associated to campaign schedules can affect multiple campaigns. Before deleting a template, check to see if it is associated to any campaign. If there is an association, warn users about the association before deleting the template.

3.6.4 Unpublishing Proposal Templates Associated to Campaign Schedules

If a template that is associated to a campaign schedule is unpublished in Oracle Proposals, the template is no longer made available to users through the campaign schedule for the language in which it is being unpublished. When such a template is unpublished, it does not impact the campaign schedule association and therefore no further action is necessary.

3.7 RTF Files Overview

The RTF files are the proposal 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:

- [Section 3.7.1, "Creating RTF Files Guidelines"](#)
- [Section 3.7.2, "Dynamic Field Structure in RTF Files"](#)

3.7.1 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 file are not supported. Definitions for these parameters from the individual files will be lost when the final file is merged.
- Only one section is allowed within a single file. 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 files unless they are overwritten and defined.
- All images must be anchored. The exact position of an image in the merged file 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, the following formats are valid:

- `<@PRP001: Proposal Name@>`
- `<@PRP001:Proposal Name@>`
- `<@PRP001:Proposal Name @>`

The following formats are not valid:

- `<@PRP001 :Proposal Name@>`
- `< @PRP001:Proposal Name@>`
- `<@ PRP001:Proposal Name@>`
- `<@PRP001: Proposal Name@ >`

Invalid entries result in errors during the RTF file upload.

Note: All files must be named to have an RTF extension in order to be correctly processed in Oracle Proposals.

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

See the following appendices for information:

- [Appendix A, "Seed Data"](#)
- [Appendix B, "Dynamic Field Structure in RTF Files"](#)

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

3.8 Other Administrative Tasks

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

- [Section 3.8.1, "Setting Profile Options"](#)
- [Section 3.8.2, "Creating Proposals Using Unpublished Templates"](#)
- [Section 3.8.3, "Concurrent Program for Offline Generation"](#)

3.8.1 Setting Profile Options

When implementing Oracle Proposals, you must set specific profile options. Please see Appendix A, "Oracle Proposals Profile Options" of the *Oracle Proposals Implementation Guide, Release 11i* for instructions and information.

3.8.2 Creating Proposals Using Unpublished Templates

Only users given the appropriate profile can create proposals using unpublished templates. Please see [Chapter 5, "Creating and Deleting Proposals"](#) for creating proposal instructions and the *Oracle Proposals Implementation Guide, Release 11i* for profile information.

3.8.3 Concurrent Program for Offline Generation

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

Accessing Proposals from the Dashboard

Sections in this chapter include:

- [Section 4.1, "Overview of Accessing Proposals"](#)
- [Section 4.2, "View Recent Proposals"](#)
- [Section 4.3, "View Proposals Due in "X" Days"](#)
- [Section 4.4, "Search for Proposals"](#)

4.1 Overview of Accessing Proposals

From the Dashboard homepage you can view a short list of recently created proposals, and proposals that are due within the number days specified in the **PRP: Proposals Due Within "X" Days** profile option. You can also view a full list of both types of proposals by selecting the **Full List** button.

The search functionality allows you to search for proposals based on certain parameters. Refer to [Section 4.4, "Search for Proposals"](#) for more details.

You can also access proposals from other applications: Oracle Quoting, Oracle Field Sales, Oracle Telesales and Oracle Sales. Refer to [Section 4.5, "Accessing Proposals from Other Applications"](#) for more details.

4.2 View Recent Proposals

Proposals that display in this table on the Dashboard are those that have been created, viewed, or modified within a number of days specified in the **PRP: Default Days for Recent Proposals** profile option. Please refer to Appendix A.4.4, "PRP: Default Days for Recent Proposals" of the *Oracle Proposals Implementation Guide, Release 11i* for more information.

To view recent proposals:

Navigation

Oracle Proposals > Dashboard > Recent Proposals section

Field Behavior

- **Name:** Proposal name displayed as a hyperlink. Select the hyperlink to access the **Proposal Detail** page for the selected proposal.
- **Description:** Proposal description
- **Customer:** Customer for whom proposal was created
- **Due Date:** Current due date for proposal
- **Status:** Proposal status - either Draft or Complete
- **Full List:** Select to change the page display to a full list of all recent proposals.

4.3 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 profile called **PRP: Proposals Due Within "X" Days**. Please refer to Appendix A.4.5, "PRP: Proposals Dues Within 'X' Days" of the *Oracle Proposals Implementation Guide, Release 11i* for more information.

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

Navigation

Oracle Proposals > Dashboard > Proposals Due in "X" Days section

Field Behavior

- **Name:** Proposal name displayed as a hyperlink. Select the hyperlink to access the **Proposal Detail** page.
- **Description:** Proposal description
- **Customer:** Customer for whom proposal was created
- **Due Date:** Current due date for proposal
- **Status:** Proposal status - either Draft or Complete
- **Full List:** Select to change the page display to a full list of all proposals due within X days.

4.4 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 include:

Proposal parameters:

- **Proposal name** – Text field
- **Status** – Drop-down. Draft or Final
- **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** – Text field
- **Contact Name** – Text field

To search for proposals:

Navigation

Oracle Proposals > Dashboard > Search Proposals button

Steps

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.

4.5 Accessing Proposals from Other Applications

Users can view proposals from related associated objects:

- An opportunity
- A quote
- A customer

Oracle Proposals will validate when users try to modify a proposal. Only the proposal creator can modify the proposal. If the user has access to the related business object but is not the creator of the proposal, the user will have read-only access to the proposal.

Creating and Deleting Proposals

Sections in this chapter include:

- [Section 5.1, "Overview of Creating Proposals"](#)
- [Section 5.2, "Creating Proposals"](#)
- [Section 5.3, "Deleting Proposals"](#)

5.1 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 several ways:

- From the Oracle Proposals Dashboard page
- From a quote on the Quote Details page
- From an opportunity in Oracle Field Sales, Oracle Telesales, or Oracle Sales
- From a customer in Oracle Field Sales or Oracle Telesales
- From a lead in Oracle Sales

If a proposal is created from a quote, opportunity, customer, or lead, customer information is carried over from the object to the proposal. If the proposal is created standalone from the Oracle Proposals Dashboard, you have to provide this information.

To create a proposal, you must select a template from a list of templates that an administrator has built out for you and then configure the proposal details.

This topic covers:

- [Section 5.1.1, "Creating Proposals Setup"](#)
- [Section 5.1.2, "Integration with Oracle Quoting"](#)
- [Section 5.1.3, "Integration with Oracle Marketing"](#)
- [Section 5.1.4, "Integration with Oracle Field Sales and Oracle Telesales"](#)
- [Section 5.1.5, "Integration with Oracle Sales"](#)
- [Section 5.1.6, "Accessing Oracle Proposals"](#)

5.1.1 Creating Proposals Setup

Oracle Proposals can be set up as a standalone application or can be integrated with other applications such as Oracle Quoting, Oracle Field Sales, Oracle Telesales, Oracle Sales, or Oracle Marketing. Setup of these applications is done by an administrator. Please refer to the *Oracle Proposals Implementation Guide*, *Oracle Quoting Implementation Guide*, *Oracle Field Sales Implementation Guide*, *Oracle Telesales Implementation Guide*, *Oracle Sales Implementation Guide*, and *Oracle Marketing Implementation Guide* for more details.

5.1.2 Integration with Oracle Quoting

If implemented with Oracle Quoting, 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, Release 11i*, the *Oracle Quoting User Guide, Release 11i*, and the *Oracle Quoting Implementation Guide, Release 11i*.

5.1.3 Integration with Oracle Marketing

If implemented with Oracle Marketing, users can associate proposal templates to campaign schedules in Oracle Marketing. When these schedules are executed and opportunities created, proposals created from these opportunities automatically pick up the associated templates.

For more information, see the *Oracle Proposals Implementation Guide, Release 11i*, the *Oracle Marketing User Guide, Release 11i*, and the *Oracle Marketing Implementation Guide, Release 11i*.

5.1.4 Integration with Oracle Field Sales and Oracle Telesales

If Oracle Proposals is implemented with Oracle Field Sales or Oracle Telesales, users can create proposals from an opportunity or lead. When the proposal is created from the opportunity, the customer information is carried over to the proposal.

For more information, see the *Oracle Proposals Implementation Guide, Release 11i*, the *Oracle Field Sales User Guide, Release 11i*, the *Oracle Field Sales Implementation Guide, Release 11i*, the *Oracle Telesales User Guide, Release 11i*, and the *Oracle Telesales Implementation Guide, Release 11i*.

5.1.5 Integration with Oracle Sales

If Oracle Proposals is implemented with Oracle Sales, users can create proposals from an opportunity or lead. They can also view proposals from a customer.

For more information see the *Oracle Sales Implementation Guide, Release 11i* and the *Oracle Sales User Guide, Release 11i*.

5.1.6 Accessing Oracle Proposals

To access Oracle Proposals, a user must be an FND user and a **Resource** in Resource Manager. On the Dashboard, users only have access to the proposals that they create. In Oracle Quoting, Oracle Field Sales, Oracle Telesales, and Oracle Sales, users only have read-only access to proposals.

5.2 Creating Proposals

Topics include:

- [Section 5.2.1, "Creating a Standalone Proposal"](#)
- [Section 5.2.2, "Creating a Proposal from a Quote"](#)
- [Section 5.2.3, "Creating a Proposal from an Opportunity"](#)
- [Section 5.2.4, "Creating a Proposal from a Customer"](#)
- [Section 5.2.5, "Creating a Proposal from a Lead"](#)

5.2.1 Creating a Standalone Proposal

To create a standalone proposal:

Navigation

Oracle Proposals > Dashboard > Create Proposal button > Create Proposal page

Steps

1. Enter a name for the proposal in the **Proposal Name** field.
2. Optionally, enter a description for the proposal in the **Proposal Description** field.
3. The **Due Date** field is automatically populated according to the value set in the **PRP: Default Number of Days for Proposal Due Date** profile option by your system administrator. Optionally, you can change the due date to a date you specify by clicking on the calendar icon and selecting a date.
4. You can search for customers by customer name or by contact. Depending on your Oracle Proposals implementation, the customer search will behave differently.
 - a. Select a customer for your proposal.
 - If you see a flashlight icon next to the **Customer Name** field and select it, the **Search and Select: Customer Name** LOV window appears. Your system administrator has disabled Data Quality Management (DQM) functionality through the **HZ: Enable DQM Party Search** profile option setting. You can search by customer name or account number.
 - If you see a **Select** button next to the **Customer Name** field and select it, the **Simple Search: Person** page displays. Your system administrator has enabled DQM functionality through the **HZ: Enable DQM Party Search** profile option setting.

 You can search for a customer by **Person** or by **Organization**, along with a variety of other parameters based on match rules. The default customer type, **Person** or **Organization**, is determined your system administrator's settings for the **PRP: Default Customer Type** profile option. If you choose **Advanced Search**, you can also search by **Person** or by **Organization**, along with additional other parameters to search by.
 - b. Optionally, if the customer receiving the proposal is an organization, you can specify a contact name.
 - If you see a flashlight icon next to the **Contact Name** field and select it, the **Search and Select: Contact Name** LOV Window appears. Your system administrator has disabled DQM functionality through the **HZ: Enable DQM Party Search** profile option setting. You can search by contact name.

- If you see a **Select** button next to the **Contact Name** field and select it, the **Simple Search: Contacts** page displays. Your system administrator has enabled DQM functionality through the **HZ: Enable DQM Party Search** profile option setting. You can search for a contact by a variety of parameters based on match rules.
- 5. You can select a template category using the **Filter By Category** drop-down. The page refreshes, displaying a list of published templates from that category.
- 6. 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.
- 7. Select the template you want to use by selecting the radio button in the row where the template is.
- 8. After selecting the **Apply** button, the user will see either of the following:
 - A confirmation message appears at the top of the **Proposal Detail** page, indicating whether the proposal has been successfully created. You can generate the proposal after checking that all components are complete.
Or:
 - If the template does not require any further input, the **Information** page appears, explaining that the proposal is being generated. Afterwards, the **Confirmation** page appears, where the user can open or download the proposal, e-mail the proposal, or go to the **Proposal Detail** page.

5.2.2 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. Refer to the *Oracle Quoting User Guide, Release 11i*, and the *Oracle Quoting Implementation Guide, Release 11i* for more information.

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 iStore
- 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.

Prerequisites

Oracle HTML Quoting Sales Agent responsibility.

Navigation

Oracle Quoting > Main Quoting page > Quote Name hyperlink > Overview page

Steps

1. Select the **Proposals** link on the overview page. 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.
2. Select **Create Proposal**. The **Create Proposal** page appears with the **Customer Name** field auto populated.
3. Notice the quote name in the Proposal header section. You may then proceed with creating the proposal. Follow the steps in [Section 5.2.1, "Creating a Standalone Proposal"](#).

5.2.3 Creating a Proposal from an Opportunity

Users working in **Opportunity** from Oracle Field Sales, Oracle Telesales, or Oracle Sales will see a **Proposal** link in the **Opportunity Detail** page which displays all related proposals for an opportunity. Users are able to view and/or edit a proposal from the list page.

Prerequisites

Sales Online User responsibility for Oracle Field Sales, Telesales Agent responsibility for Oracle Telesales, or Sales User responsibility in Oracle Sales.

Navigation

Oracle Field Sales, Oracle Telesales, or Oracle Sales > Opportunity > Opportunity Details page > Proposals > Create Proposal button

Steps

Selecting the **Create Proposal** button takes the user to the **Proposals** tab, where the user may create a proposal. Refer to [Section 5.2.1, "Creating a Standalone Proposal"](#) for more details.

Notes

Proposal customer name & primary contact name are auto populated based on the information in the opportunity. Users can change the proposal contact on the **Create Proposal** page.

There are several scenarios for proposal template selection:

- If the opportunity is created from a campaign schedule, the user can only select proposal templates associated to that campaign schedule. If there is only one template associated with the campaign schedule, it will be auto generated for proposal creation. If more than one template is associated with the campaign, the first template is auto selected.
- If all the components of the selected template are complete (meaning they do not have any dynamic fields or do not need any objects), the first version of the proposal document will be automatically generated. If any components of the selected template are incomplete, users are taken to the **Proposal Detail** page where they can personalize the proposal and modify the proposal further.
- If no campaign schedule is associated to an opportunity, the user can select from a list of all published templates to create the proposal.
- The defaulting proposal name and description should be based on the template name and description. If multiple templates are available via the campaign schedule, the auto-selected template is used to default the name and description. If there is no associated template, nothing is defaulted.

5.2.4 Creating a Proposal from a Customer

Users working in Oracle Field Sales or Oracle Telesales within the context of a customer will see a Proposal link from where they can view and/or edit a proposal from the list page. The user can also create a new proposal for the customer. In Oracle Sales, the user may only view proposals for a customer by selecting **Proposals Received** from the **View** drop-down menu in the **Business Activities** section.

When the user creates a proposal, the customer name is auto populated in the **Create Proposal** page. Users can change the proposal contact on the **Create Proposal** page.

Prerequisites

Sales Online User responsibility for Oracle Field Sales, Telesales Agent responsibility for Oracle Telesales, or Sales User responsibility for Oracle Sales.

Navigation

Oracle Field Sales, Oracle Telesales, or Oracle Sales > Customer > Customer Name hyperlink > Customer Detail page > Proposals > Create Proposal button

Steps

Selecting the **Create Proposal** button takes the user to the **Proposals** tab, where the user may create a proposal. Refer to [Section 5.2, "Creating Proposals"](#) for more details. The customer name is carried over to the proposal.

5.2.5 Creating a Proposal from a Lead

Users who have logged into Oracle Sales through Self-Service mode will see a **Create Proposal** button from the **Lead Detail** page. Proposals can be created from standalone leads or from leads generated from a sales campaign. If the associated sales campaign has proposal templates associated to it, the proposal created from the lead will be generated based on the associated proposal template.

To create a proposal from a lead:

Prerequisites

Log into Self-Service mode.

Sales User responsibility.

Navigation

Self-Service Login > Oracle Sales > Sales Dashboard > Leads section > Full List button > Leads page > Lead name hyperlink > Update Lead page > Proposals sub-tab > Create Proposal button

Steps

1. Select the **Create Proposal** button on the **Proposals** sub-tab section. The **Create Proposal** page appears with the **Customer** field auto populated.
2. Notice the lead name in the Proposal header section. You may then proceed with creating the proposal. Follow the steps in [Section 5.2.1, "Creating a Standalone Proposal"](#).

Notes

Proposal customer name and primary contact name are auto populated based on the information in the lead. Users can change the proposal contact on the **Create Proposal** page.

There are several scenarios for proposal template selection:

- If the lead is associated with a campaign schedule, the user can only select proposal templates associated to that campaign schedule. If there is only one template associated with the campaign schedule, it will be auto generated for proposal creation. If more than one template associated with the campaign, the first template is auto selected.
- If all the components of the selected template are complete (meaning they do not have any dynamic fields, have values for all dynamic fields, or do not need any objects), the first version of the proposal document will be automatically generated. If any components of the selected template are incomplete, users are taken to the **Proposal Detail** page where they can personalize the proposal and modify the proposal further.
- If no campaign schedule is associated to a lead, the user can select from a list of published templates to create the proposal.
- The defaulting proposal name and description should be based on the template name and description. If multiple templates are available via the campaign schedule, the auto-selected template is used to default the name and description. If there is no associated template, nothing is defaulted.

5.3 Deleting Proposals

Users can delete proposals provided the following:

- The user has access to the proposal.
- The generated versions of the proposal have not been e-mailed to any customer.
- The proposal is not in the process of being generated.

To delete a proposal:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page

Steps

1. Select **Delete** in the upper right corner of the **Proposal Detail** page.
2. A warning page appears, asking to confirm if the proposal should be deleted.
3. Select **Yes** to confirm that the proposal is to be deleted. Select **No** to cancel the deletion process.

Personalizing Proposal Content

Sections in this chapter include:

- [Section 6.1, "Overview of Proposal Content"](#)
- [Section 6.2, "Viewing Proposal Components"](#)
- [Section 6.3, "Including and Excluding Components"](#)
- [Section 6.4, "Adding Files to Proposals"](#)
- [Section 6.5, "Changing Component Order in Proposals"](#)
- [Section 6.6, "Personalizing Proposal Sections"](#)
- [Section 6.7, "Adding Quotes to a Proposal"](#)
- [Section 6.8, "Removing Quotes"](#)
- [Section 6.9, "Editing Header Details"](#)

6.1 Overview of Proposal Content

The **Proposal Detail** page is the central location where all proposal versions are listed. This page displays a list of components available to user as well as what the user included. You may need to complete some components by providing values for dynamic fields within a component, or by a quote if it is required for a component.

6.2 Viewing Proposal Components

To view proposal components:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section

Field Behavior

- **Generate New Version:** Allows the user to generate a new version of the proposal.
- **Add File:** Allows the user to add a file from their desktop, Oracle Content Manager Folders or Oracle Content Manager Library. File addition available only if permitted by template.
- **Change Order:** Allows the user to change the component order.
- **Select:** This column shows all included components as checked, all excluded components as unchecked, and all mandatory components as checked and the checkbox disabled.
- **Component 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 selected document name for a component.
- **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.
- Icon denotes added component/file. Components are added at the end of the list.

6.2.1 Previewing Files of a Component

To preview files of a component:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section > Preview icon

Field Behavior

- **Preview:** Selecting the icon in the **Preview** column for the component opens up a word processor window.

6.2.2 Viewing Component Details

To view component details:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section > Component Name hyperlink

Steps

You can view component details only for components that have been included in the proposal. Included components' names will be hyperlinked. When you select the hyperlink in the **Name** column for the component, there are two possible scenarios:

- If the component is one of the already included components of the template from which the proposal is built, the Proposal Component Details page appears:

Alternate Documents section: To choose a different document for this component, select the radio button in the document's **Select** column. The page refreshes and displays the dynamic fields for the document in the **Personalization** section.

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 related dynamic fields. 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. If you press the **Make it Primary** button after selecting a quote, the selected quote then becomes the primary quote for the proposal. The designated quote information is used if the document requires information from a single quote. The **Primary** designation is relevant only if there are multiple quotes.

- If the component is an externally added file, the **Added File** page appears:
 - Name:** View or edit the file name
 - Description:** View or edit the file description. Optional field.
 - File Name:** Select the file name hyperlink to view the file.
 - Content Manager Information:** If the file was uploaded from Oracle Content Manager, this section displays the file version, owner, location and last update date.

6.3 Including and Excluding Components

You can choose to include or exclude certain components within a proposal - however, some components may be mandatory, which are set at the template level.

To include or exclude components in a proposal:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section

Steps

Using the checkboxes in the **Select** column, select or deselect the component(s) you want to include/exclude from the proposal. To select all components, use the **Select All** link. If a component is mandatory, you will see a disabled checkbox. You **cannot** exclude mandatory components.

Notes

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

6.4 Adding Files to Proposals

If a template allows users to add files as components, users can add files from the components list page. When adding components, the file will be validated against the following rules:

1. The files must be RTFs.
2. The files must have no dynamic field codes.

3. The file must have valid RTF structure (Please see [Appendix B, "Dynamic Field Structure in RTF Files"](#) for supported RTF structures).

The files will be parsed and validated. Newly added files are placed at the end of the list. Users can move them using the **Reorder** functionality as outlined in [Chapter 6.5, "Changing Component Order in Proposals"](#). Added files will be flagged with an icon to denote that they weren't part of original template. Added files are excludable. Users should be able to exclude them from structure, but include later if they wish.

This section discusses the following topics:

- [Section 6.4.1, "Adding Files from the Desktop \(With Oracle Content Manager Disabled\)"](#)
- [Section 6.4.2, "Adding Files from the Desktop \(With Oracle Content Manager Enabled\)"](#)
- [Section 6.4.3, "Adding Files from Oracle Content Manager Library"](#)
- [Section 6.4.4, "Adding Files from Oracle Content Manager Folders"](#)

6.4.1 Adding Files from the Desktop (With Oracle Content Manager Disabled)

To add files from the desktop when Oracle Content Manager is disabled:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section > Add File button

Steps

To add external files as components, select the **Add File** button. The **Add File: Desktop** page appears. In this page, search for a file by selecting the **Browse** button beside the **File** field. Optionally, give a name to the file in the **Name** field. Otherwise, the file name will be used.

6.4.2 Adding Files from the Desktop (With Oracle Content Manager Enabled)

To add files from the desktop when Oracle Content Manager is enabled:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section > Add File button

Steps

1. Follow the steps in [Section 6.4.1, "Adding Files from the Desktop \(With Oracle Content Manager Disabled\)"](#).
2. Depending on the settings for the **PRP: Use Oracle Content Manager** profile option, you will see additional fields after the Name field:
 - If the profile option is set to **Yes**, an additional section called **Content Manager Folder** appears.
 - If the profile option is set to **Optional**, the drop-down field, **Save in Content Manager**, appears under the **Name** field. You can select **No** or **Yes** from the drop-down LOV. **No** is the default selection. If you select **Yes**, the Content Manager Folder section appears.
3. If the profile option is set to **Yes**, save the file in **Content Manager**. This allows you to reuse the file later for other components. You can save the file to Oracle Content Manager in several different ways:
 - Create a folder in Oracle Content Manager to save the file in by selecting the **Create Folder** button.
 - Choose an existing folder in Oracle Content Manager if you have been given access to it by the administrator by selecting the flashlight icon. You can view the content of the chosen folder by selecting the **View Folder** button.
4. Select the folder you want to save the file in. The default folder is set by your system administrator in the **IBC: Default Home Folder** profile option.

6.4.3 Adding Files from Oracle Content Manager Library

If your system administrator has enabled Oracle Content Manager in the **PRP: Use Oracle Content Manager** profile option, Oracle Proposals users are able to add files from the Oracle Content Manager Library, a repository where users can publish content to certain categories that have been setup by an administrator.

The user can browse the categories of the Library or perform a keyword search in the categories that the user has permission.

Oracle Proposals will only use files in Oracle Content Manager that have an attachment, that are live, are approved, and are in the user's session language. See [Appendix D, "Permissions for Oracle Content Manager"](#) for more details. Only content items that have these attributes will be displayed to the user in the Library and in the Folders (following flow).

To add files from the Oracle Content Manager Library:

Navigation:

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section > Add File button > Add File: Desktop page

Steps

1. From the **Alternate Content Sources** bin on the **Add File: Desktop** page, select **Add File: Library**.
2. You can browse or search for a file from the Oracle Content Manager Library in several ways:

- Browse the Oracle Content Manager Library categories for which you have permissions in Oracle Content Manager by selecting the **Browse Library** button, if the **Browse Library** section isn't already displayed. Select category names to view the contents. You can also select the **Focus** icon beside each category to view only that category and its contents. Select the radio button beside the category you want and then select **Apply**.

Optionally, you can go directly to the root category by selecting the **Navigate to Root Category** hyperlink.

- In the **Add File: Library: Search and Select File** page, search for the file by entering the first few characters of the file name in the **Search** field and selecting **Go**. A **Results** table displays, showing matching files based on the search. Select the radio button beside the file you want and then select **Apply**.
- Select the **Advanced Search** hyperlink beside the **Go** button. The **Add File: Library: Advanced Search** page appears. Enter or select values in the search criteria fields, and then select **Go**. In the **Results** table, select the file you want, and then select **Apply**.

Notes

By selecting a content type, the **Attribute** section will refresh to display additional fields that the user can search by for that content type.

6.4.4 Adding Files from Oracle Content Manager Folders

If your system administrator has enabled Oracle Content Manager in the **PRP: Use Oracle Content Manager** profile option, Users will be able to add files from folders that they have access in Oracle Content Manager.

To add files from Oracle Content Manager Folders:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section > Add File button > Add File: Desktop page

Steps

1. From the **Alternate Content Sources** bin on the **Add File: Desktop** page, select **Add File: Folders**.
2. You can browse or search for a file from the Oracle Content Manager Folders in several ways:

- Browse the Oracle Content Manager Folders for which you have permissions in Oracle Content Manager by selecting the **Browse Folders** button, if the **Browse Folders** section isn't already displayed. Select category names to view the contents. You can also select the **Focus** icon beside each category to view only that category and its contents. Select the radio button beside the category you want and then click **Apply**.

Optionally, you can go directly to the root folder by selecting the **Navigate to Root Folder** hyperlink.

- In the **Add File: Folders** page, search for the file by entering the first few characters of the file name in the **Search** field and selecting **Go**. A **Results** table displays, showing matching files based on the search. Select the radio button beside the file you want and then click **Apply**.
- Select the **Advanced Search** hyperlink beside the Go button. The **Add File: Folder: Advanced Search** page appears. Enter or select values in the search criteria fields, and then select **Go**. In the **Results** table, select the file you want, and then select **Apply**.

Notes

By selecting a content type, the **Attribute** section will refresh to display additional fields that the user can search by for that content type.

6.5 Changing Component Order in Proposals

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:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section > Change Order button > Change Order page

Steps

Select a component name and change the order of the components by using the Up or Down arrows.

Notes

You must regenerate the proposal before the changes are reflected in the generated document.

6.6 Personalizing Proposal Sections

A checkmark in the **Complete** column on the **Proposal Components** section of the Proposal page indicates that a component is complete. An X in the **Complete** column means that a component is incomplete and you need to provide a value or information.

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

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Component section

Steps

1. In the **Proposal Components** section, checkmarks in the **Complete** column indicate complete components. Crossmarks indicate incomplete components that require your attention. For any components with crossmarks in the **Complete** column:

- a. Select the component name hyperlink. The proposal component detail page appears.
- b. In the **Personalization** section at the bottom of the page, provide the values needed in the fields that appear.

Notes

Only proposal creators can update their proposals.

6.6.1 Adding Values for Dynamic Fields

To add values for dynamic fields:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Components section > Component Name hyperlink > Proposal Component page

Steps

In the **Personalization** section, you can provide values for any of the dynamic field objects using the text fields and/or drop-downs.

Notes

Depending on whether a quote is reference in the document, user may need to provide a quote. Refer to [Section 6.7, "Adding Quotes to a Proposal"](#) for more details.

6.7 Adding Quotes to a Proposal

To add quotes to a proposal:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Components section > Proposal Component Name hyperlink > Proposal Component page

Steps

1. In the **Quotes** section, select **Add Quote**. The **Search and Select: Quote** page displays. Search for a quote either by **Quote Name** or **Quote Number**. 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 component detail page and the quote information displays in the **Quote** table.

2. To add more quotes, repeat the above step.
3. The first quote added will be defaulted as the primary quote. To make another quote primary, select the radio button in the **Select** column, then select **Make It Primary**. 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

Notes

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.

Oracle Contracts is a conditional dependency for Oracle Proposals if being pulled in as a part of a quote through Oracle Quoting. If Oracle Contracts is enabled, Oracle Proposals does not support table tokens in Contracts templates. Refer to Section 2.3, "Oracle Proposals Conditional Dependencies" of the *Oracle Proposals Implementation Guide, Release 11i*, for more details.

6.8 Removing Quotes

To remove quotes from a proposal component:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Components section > Proposal Component Name hyperlink > Proposal Component Detail page

Steps

Select the icon in the **Remove** column in the row of the quote to be removed. The page refreshes and the selected quote information is removed.

Notes

If there are multiple quotes, the primary quote cannot be removed. You will need to specify another quote as primary before you can delete one currently defined as primary. You must regenerate the proposal version before the changes are reflected in the document.

6.9 Editing Header Details

You are able to edit the following header details:

- Proposal Name
- Description
- Due Date
- Proposal Contact

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

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

To edit header details:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page

Field Behavior

- **Name:** Edit the proposal name.
- **Description:** Edit the proposal description. Optional field.
- **Due Date:** Select the calendar icon and pick a new date, or enter a new date in the text field.
- **Status:** Read-only.
- **Template:** Read-only.
- **Customer:** Read-only.
- **Proposal Contact:** If the customer receiving the proposal is an organization, you can choose a contact for that organization. Refer to step 4b of [Section 5.2, "Creating Proposals"](#) for more details.
- **Created by:** Read-only.

If a generated proposal version is final, the header status will be complete.

Generating and Working with Proposal Versions

This chapter covers:

- [Section 7.1, "Overview of Generating Proposals Versions"](#)
- [Section 7.2, "Generating Proposals Versions"](#)
- [Section 7.3, "Uploading Proposal Versions"](#)
- [Section 7.4, "Downloading Proposal Versions"](#)
- [Section 7.5, "Viewing & Editing Remarks in Proposal Versions"](#)
- [Section 7.6, "Changing Existing Version Status"](#)
- [Section 7.7, "Deleting Generated Proposal Versions"](#)
- [Section 7.8, "E-mailing Proposal Versions to Customers"](#)

7.1 Overview of Generating Proposals Versions

Once your proposal has been created, and all components 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 your

system administrator's setting for the **PRP: Maximum File Size For Online Generation** profile option. This profile option specifies 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"](#), Appendix A, "Oracle Proposals Profile Options" of the *Oracle Proposals Implementation Guide, Release 11i*, and the *Oracle Applications System Administrator's Guide* for more information.

Note: The **Generate New Version** button is only enabled if all included components are complete. The proposal must also have at least one included component.

7.2 Generating Proposals Versions

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 view, download to your desktop, or e-mail 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. **Generation in Process** status occurs when a proposal version is currently being generated offline. If you attempt to modify 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 New Version** button is enabled. This button is available in the **Proposal Components** section of the **Proposal Detail** page.

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 latest document, and then applies it to all components if the customized style names are the same. For example, if you use 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.

Note: if an "out of memory" error message displays when generating proposal versions either online or offline or when previewing proposal versions, this may be due to an excessive number of styles within a document. Try reducing the number of styles in the component documents.

To generate proposal versions:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Proposal Component section

Field Behavior

Generate New Version: If all components of the proposal are complete, the **Generate New Version** button is enabled. If it is disabled, you cannot generate the document until you have completed all components.

Steps

1. Select **Generate New Version** in the **Proposal Components** section.
2. The value set by your system administrator in the **PRP: Maximum File Size For Online Generation** profile option determines if the proposal version will be generated online or offline. If the size of the proposal version is less than the value in the profile option, the proposal version will be generated online. If the file size exceeds the value in the profile option, the proposal version will be generated offline.
3. While the proposal is being generated offline, the following values display in the **Existing Versions** section:
 - **Select:** The radio button in this column is disabled.
 - **Document Name:** Not displayed.

- **Creation Process:** Status displays as a hyperlink. Click to access the Information page.
 - **Status:** No information is listed.
 - **E-mail History:** No information is listed.
 - **Delete:** Delete icon is disabled.
4. For proposals that are generated successfully, a row is created in the **Existing Versions** section displaying:
- **Select:** An enabled radio button in the this 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**. If the proposal is being generated offline, and its generation fails, displays **Generation Failed**.
 - **Status:** Drop-down. Choose either **Draft** or **Final**.

Notes

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

7.3 Uploading Proposal Versions

You can upload proposal documents and view proposal details.

To upload proposal versions:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Upload New Version button > Upload Proposal page

Steps

1. After selecting a file, select a status - **Draft** or **Final** -using the **Status** drop-down.
2. Optionally, add any remarks in the **Remarks** text field.
3. After selecting **Apply**, the **Proposal Detail** page appears, either displaying a confirmation message that the file was uploaded successfully, or an error message. The uploaded version can be viewed in the **Existing Versions** table.

7.4 Downloading Proposal Versions

To download proposals:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Existing Versions section > View/Download Proposal button

Steps

1. Select a document using the radio button in the **Select** column.
2. Select **View/Download**. Depending on your desktop settings, you may see a File Download window, where you can choose to open the file, save the file to your desktop, or cancel the action. You may also be able to select whether the word processor should automatically open or save the file by deselecting the **Always ask before opening this type of file** checkbox.

7.5 Viewing & Editing Remarks in Proposal Versions

To view or edit remarks for a proposal version:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Existing Versions section > View/Edit Remarks button

Steps

Remarks text (if any) is displayed in the **Proposal Remarks** section of the page. Make any edits you wish to make.

7.6 Changing Existing Version Status

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

To change document version status:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Existing Versions section > Status column

Steps

Using the drop-down, select **Draft** or **Final** as the status in the **Status** column.

7.7 Deleting Generated Proposal Versions

Users can delete generated proposal versions of an existing proposal if it hasn't been e-mailed to a customer.

To delete a generated proposal version:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Existing Versions section

Steps

1. Click on the **Delete** icon in the row of the generated proposal version you wish to delete.
2. A warning page appears, asking you to confirm whether to delete the proposal document or not. Select **Yes** to continue the operation, or select **No** to cancel the operation.

Notes

Versions that have been e-mailed or that are being generated offline cannot be deleted.

7.8 E-mailing Proposal Versions to Customers

Proposals can be sent to contacts for the customer of the proposal. The available list of contacts for the customer are those that have been entered previously.

Users can also enter multiple free text e-mail addresses entered in the **Additional Recipients** field. Oracle Proposals will check for valid e-mail addresses in the *jdoe@company.com* format. Multiple addresses should be separated by commas.

Users also have the option of blind carbon copying (BCC:) themselves.

Note: Two profiles need to be configured by your system administrator before using the Oracle Proposals e-mail functionality: **PRP: SMTP Server Name**, and **PRP: SMTP Server Port**. Also, your system administrator must run the concurrent program, **Synchronize Employee**, in order to synchronize any changes that have been made to employee information in Resource Manager. Please see the *Oracle Proposals Implementation Guide, Release 11i* for details.

To e-mail proposals:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Existing Versions section

Steps

1. Using the radio button in the **Select** column, select a document from the **Existing Versions** section. Select **E-mail**. The E-mail Proposal page opens.
2. Optionally, select the **Blind Copy (BCC) Self** checkbox to have a copy of the proposal sent to yourself.
3. If the proposal has a contact selected, the e-mail address for the contact will default in the **To:** field. To change or add "To" recipients, select **Edit Recipients**. The **E-mail 'To' Recipients** page appears. Select a name listed under **Available recipients** and select the **Move** arrow. To move all, select **Move All**. To remove recipients listed under **Selected recipients**, select a name and then select **Remove**. To remove all recipients, select **Remove All**.

Note: If your e-mail address is not correctly setup in Resource Manager, you will receive an error message and not be allowed to e-mail your proposal.

4. Editing **CC Recipients**: To change or add copied (CC) recipients, select **Edit Recipients**. The **E-mail Proposal: Edit "CC" List** page appears, where you can make the appropriate changes. Optional.
5. Additional recipients can be typed in. Separate e-mail address by a comma. Optional.

6. The proposal document name appears in the **Attachment** section. This document is zipped by default and attached to the e-mail. To send the document as a regular, unzipped attachment, uncheck the **Zip attachment in the e-mail** checkbox.
7. Enter a subject in the **Subject** text field.
8. Enter a text message in the **Text** field.
9. After selecting **Send**, the **Proposal Detail** page appears with either a message indicating that the proposal has been e-mailed successfully, or an error message stating why the proposal was not sent. If the proposal e-mailing was successful, the **E-mail History** icon displays in the **E-mail History** column of the **Existing Versions** section.

7.8.1 Viewing E-mail History

Oracle Proposals maintains an e-mail history for every generated proposal document that has been e-mailed through Oracle Proposals. You can view e-mail history and view e-mail messages.

To view e-mail history:

Navigation

Oracle Proposals > Dashboard > Proposal Name hyperlink > Proposal Detail page > Existing Versions section > E-mail History column

Steps

1. Select the icon in the **E-mail History** column. The **E-mail History** page appears displaying the e-mail information in the **E-mail 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
 - **E-mail Message:** E-mail subject displayed as a hyperlink
2. Select the link in the **E-mail Message** column of the **E-mail History** page. The **E-mail History: E-mail Message** page appears displaying:
 - **Sender:** The name of the sender and whether the sender blind carbon copied himself/herself.

- **To:** E-mail recipient
- **CC:** Copied recipients
- **Additional Recipients:** Recipients that the sender added in by typing in their e-mail address
- **Attachment:** RTF file name
- **Subject and Text:** Subject entered in **Subject** field and text entered in **Text** field.

Part III

Appendices

This part contains the following appendices:

- [Appendix A, "Seed Data"](#)
- [Appendix B, "Dynamic Field Structure in RTF Files"](#)
- [Appendix C, "Creating Java Program Dynamic Fields"](#)
- [Appendix D, "Permissions for Oracle Content Manager"](#)

This appendix contains information about seeded data in Oracle Proposals.

Sections in this appendix include:

- [Section A.1, "Seeded Data"](#)
- [Section A.2, "Seeded Dynamic Fields"](#)
 - [Section A.2.1, "Proposal Dynamic Fields - General"](#)
 - [Section A.2.2, "Proposal Dynamic Fields - Customer"](#)
 - [Section A.2.3, "Proposal Dynamic Fields - Sales Representative"](#)
 - [Section A.2.4, "Quote Dynamic Fields - Header: General"](#)
 - [Section A.2.5, "Quote Dynamic Fields - Header: Customer"](#)
 - [Section A.2.6, "Quote Dynamic Fields - Header: Pricing"](#)
 - [Section A.2.7, "Quote Dynamic Fields - Header: Contract"](#)
 - [Section A.2.8, "Quote Dynamic Fields - Header: Payment"](#)
 - [Section A.2.9, "Quote Dynamic Fields - Header: Attachment"](#)
 - [Section A.2.10, "Quote Dynamic Fields - Lines: General"](#)
 - [Section A.2.11, "Quote Dynamic Fields - Lines: Pricing"](#)
 - [Section A.2.12, "Structure Dynamic Fields"](#)

A.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 through user defined tokens. The following is a comprehensive list of the seeded data currently included in the application.

A.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.

A.2.1 Proposal Dynamic Fields - General

This table lists the **Proposal - General** seeded dynamic fields.

Table A-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@>

A.2.2 Proposal Dynamic Fields - Customer

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

Table A-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)	Field Code: PRP006 RTF Display: <@PRP006:Customer Name@>
Contact Name	HZ_PARTIES	PERSON_FIRST_NAME, PERSON_MIDDLE_NAME, PERSON_LAST_NAME	Field Code: PRP007 RTF Display: <@PRP007>Contact Name@>
Contact Title	HZ_PARTIES	PERSON_TITLE	Field Code: PRP008 RTF Display: <@PRP008>Contact Title@>
Contact Phone Number	HZ_CONTACT_POINTS	PHONE_COUNTRY_CODE, PHONE_AREA_CODE, PHONE_NUMBER, PHONE_EXTENSION	Field Code: PRP009 RTF Display: <@PRP009:Contact Phone Number@>
Customer Email Address	HZ_PARTIES	EMAIL_ADDRESS	Field Code: PRP010 RTF Display: <@PRP010:Customer Email@>

A.2.3 Proposal Dynamic Fields - Sales Representative

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

Table A-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 come from the appropriate table. Field Code: PRP012 RTF Display: <@PRP012:Sales Rep Name@>

Table A-3 Proposal Dynamic Fields - Sales Representative

Dynamic field Name	Table	Comment
Sales Rep Phone Number	JTF_RS_RESOURCES or HR Employee table	Based on whether the user is an employee or resource, name should come from the appropriate table. Field Code: PRP013 RTF Display: <@PRP013:Sales Rep Phone Number@>
Sales Rep Fax Number	JTF_RS_RESOURCES or HR Employee table	Based on whether the user is an employee or resource, name should come from the appropriate table. Field Code: PRP014 RTF Display: <@PRP014:Sales Rep Fax Number@>
Sales Rep Email	JTF_RS_RESOURCES or HR Employee table	Based on whether the user is an employee or resource, name should come from the appropriate table. Field Code: PRP015 RTF Display: <@PRP015:Sales Rep Email@>
Sales Rep Address Line 1	JTF_RS_RESOURCES or HR Employee table	Field Code: PRP016 RTF Display: <@PRP016:Sales Rep Address Line 1@>
Sales Rep Address Line 2	JTF_RS_RESOURCES or HR Employee table	Field Code: PRP017 RTF Display: <@PRP017:Sales Rep Address Line 2@>
Sales Rep City	JTF_RS_RESOURCES or HR Employee table	Field Code: PRP018 RTF Display: <@PRP018:Sales Rep City@>
Sales Rep State	JTF_RS_RESOURCES or HR Employee table	Field Code: PRP019 RTF Display: <@PRP019:Sales Rep State@>

Table A-3 Proposal Dynamic Fields - Sales Representative

Dynamic field Name	Table	Comment
Sales Rep ZIP	JTF_RS_RESOURCES or HR Employee table	Field Code: PRP020 RTF Display: <@PRP020:Sales Rep ZIP@>
Sales Rep County	JTF_RS_RESOURCES or HR Employee table	Field Code: PRP021 RTF Display: <@PRP021:Sales Rep County@>
Sales Rep Province	JTF_RS_RESOURCES or HR Employee table	Field Code: PRP022 RTF Display: <@PRP022:Sales Rep Province@>
Sales Rep Country	JTF_RS_RESOURCES or HR Employee table	Field Code: PRP023 RTF Display: <@PRP023:Sales Rep Country@>
Sales Rep Job Title	JTF_RS_RESOURCES or HR Employee table	Based on whether the user is an employee or resource, name should come from the appropriate table. Field Code: PRP024 RTF Display: <@PRP024:Sales Rep Job Title@>

A.2.4 Quote Dynamic Fields - Header: General

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

Table A-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@>
Quote Number	ASO_QUOTE_HEADERS_ALL	QUOTE_NUMBER	Field Code: PRPQOT002 RTF Display: <@PRPQOT002:Quote Number@>

Table A-4 Quote Dynamic Fields - Header: General

Dynamic field Name	Table	Table Column	Comment
Quote Version	ASO_QUOTE_HEADERS_ALL	QUOTE_VERSION	Field Code: PRPQOT003 RTF Display: <@PRPQOT003:Quote Version@>
Expiration Date	ASO_QUOTE_HEADERS_ALL	QUOTE_EXPIRATION_DATE	Field Code: PRPQOT004 RTF Display: <@PRPQOT004:Expiration Date@>
Campaign Name	AMS_CAMPAIGNS_ALL_TL	CAMPAIGN_NAME	Field Code: PRPQOT005 RTF Display: <@PRPQOT005:Campaign Name @>
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@>
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@>
Status	ASO_QUOTE_STATUSES_TL	MEANING	Field Code: PRPQOT054 RTF Display: <@PRPQOT054:Status@>
Category Description	MTL_CATEGORIES_TL	DESCRIPTION	Field Code: PRPQOT150 RTF Display: <@PRPQOT150:Category Description@>
Category Subtotal	ASO_QUOTE_LINES_ALL	Sum of [QUANTITY (LINE_LIST_PRICE + LINE_ADJUSTED_AMOUNT)] - Returns for each category.	Field Code: PRPQOT151 RTF Display: <@PRPQOT151:Category Subtotal@>

Table A-4 Quote Dynamic Fields - Header: General

Dynamic field Name	Table	Table Column	Comment
Category Adjustment Amount	ASO_QUOTE_LINES_ALL	Sum of LINE_ADJUSTED_AMOUNT-RETURNS for each category	Field Code: PRPQOT152 RTF Display: <@PRPQOT152:Category Adjustment Amount@>
Category Subtotal List Price	ASO_QUOTE_LINES_ALL	Sum of LINE_LIST_PRICE for each category.	Field Code: PRPQOT153 RTF Display: <@PRPQOT153:Category Subtotal List Price@>

A.2.5 Quote Dynamic Fields - Header: Customer

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

Table A-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)	Field Code: PRPQOT008 RTF Display: <@PRPQOT008:Sold to Cust Name@>
Sold to Cust Acct Number	HZ_CUST_ACCOUNTS	ACCOUNT_NUMBER	Field Code: PRPQOT009 RTF Display: <@PRPQOT009:Sold to Cust Acct Number@>

Table A-5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Sold to Contact Name	HZ_PARTIES	PERSON_FIRST_NAME PERSON_MIDDLE_NAME PERSON_LAST_NAME PERSON_NAME_SUFFIX	Does not exist if the customer is a party of type person. Field Code: PRPQOT010 RTF Display: <@PRPQOT010:Sold to Contact Name@>
Sold to Contact Title	HZ_PARTIES	PERSON_TITLE	Field Code: Q0T011 RTF Display: <@PRPQOT011:Sold to Contact Title@>
Sold to Cust Addressee	HZ_PARTY_SITES	ADDRESSEE	Field Code: PRPQOT012 RTF Display: <@PRPQOT012:Sold to Cust Addressee@>
Sold to Cust Address Line 1	HZ_LOCATIONS	ADDRESS 1	Field Code: PRPQOT013 RTF Display: <@PRPQOT013:Sold to Cust Address Line 1@>
Sold to Cust Address Line 2	HZ_LOCATIONS	ADDRESS 2	Field Code: PRPQOT014 RTF Display: <@PRPQOT014:Sold to Cust Address Line 2@>
Sold to Cust City	HZ_LOCATIONS	CITY	Field Code: PRPQOT015 RTF Display: <@PRPQOT015:Sold to Cust City@>
Sold to Cust State	HZ_LOCATIONS	STATE	Field Code: PRPQOT016 RTF Display: <@PRPQOT016:Sold to Cust State@>

Table A-5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Sold to Cust ZIP	HZ_LOCATIONS	POSTAL_CODE	Field Code: PRPQOT017 RTF Display: <@PRPQOT017:Sold to Cust ZIP@>
Sold to Cust County	HZ_LOCATIONS	COUNTY	Field Code: PRPQOT018 RTF Display: <@PRPQOT018:Sold to Cust County@>
Sold to Cust Province	HZ_LOCATIONS	PROVINCE	Field Code: PRPQOT019 RTF Display: <@PRPQOT019:Sold to Cust Province@>
Sold to Cust Country	HZ_LOCATIONS	COUNTRY	Field Code: PRPQOT020 RTF Display: <@PRPQOT020:Sold to Cust Country@>
Sold to Contact Phone	HZ_CONTACT_POINTS	PHONE_COUNTRY_CODE PHONE_AREA_CODE PHONE_NUMBER PHONE_EXTENSION	Field Code: PRPQOT021 RTF Display: <@PRPQOT021:Sold to Contact Phone@>
Sold to Cust Email	HZ_PARTIES	EMAIL_ADDRESS	Field Code: PRPQOT022 RTF Display: <@PRPQOT022:Sold to Cust Email@>
Bill to Customer Name	HZ_PARTIES	PARTY_NAME (for organization) or PERSON_FIRST_NAME PERSON_MIDDLE_NAME PERSON_LAST_NAME (for people)	Field Code: PRPQOT093 RTF Display: <@PRPQOT093:Bill To Customer Name@>

Table A-5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Bill to Customer Account Number	HZ_CUST_ACCOUNTS	ACCOUNT_NUMBER	Field Code: PRPQOT094 RTF Display: <@PRPQOT094:Bill To Customer Account@>
Bill to Customer Addressee	HZ_PARTY_SITES	ADDRESSEE	Field Code: PRPQOT095 RTF Display: <@PRPQOT095:Bill To Customer Addressee@>
Bill to Customer Address Line 1	HZ_LOCATIONS	ADDRESS 1	Field Code: PRPQOT096 RTF Display: <@PRPQOT096:Bill To Customer Address Line 1@>
Bill to Customer Address Line 2	HZ_LOCATIONS	ADDRESS 2	Field Code: PRPQOT097 RTF Display: <@PRPQOT097:Bill To Customer Address Line 2@>
Bill to Customer City	HZ_LOCATIONS	CITY	Field Code: PRPQOT098 RTF Display: <@PRPQOT098:Bill To Customer City@>
Bill to Customer State	HZ_LOCATIONS	STATE	Field Code: PRPQOT099 RTF Display: <@PRPQOT099:Bill To Customer State@>
Bill to Customer ZIP	HZ_LOCATIONS	POSTAL_CODE	Field Code: PRPQOT100 RTF Display: <@PRPQOT100:Bill To Customer ZIP@>
Bill to Customer County	HZ_LOCATIONS	COUNTY	Field Code: PRPQOT101 RTF Display: <@PRPQOT101:Bill To Customer County@>

Table A-5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Bill to Customer Province	HZ_LOCATIONS	PROVINCE	Field Code: PRPQOT102 RTF Display: <@PRPQOT102:Bill To Customer Province@>
Bill to Customer Country	HZ_LOCATIONS	COUNTRY	Field Code: PRPQOT103 RTF Display: <@PRPQOT103:Bill To Customer County@>
Ship to Customer Name	HZ_PARTIES	PARTY_NAME (for organization) or PERSON_FIRST_NAME PERSON_MIDDLE_NAME PERSON_LAST_NAME (for people)	Field Code: PRPQOT104 RTF Display: <@PRPQOT104:Ship To Customer Name@>
Ship to Customer Account Number	HZ_CUST_ACCOUNTS	ACCOUNT_NUMBER	Field Code: PRPQOT105 RTF Display: <@PRPQOT105:Ship To Customer Account Number@>
Ship to Customer Addressee	HZ_PARTY_SITES	ADDRESSEE	Field Code: PRPQOT106 RTF Display: <@PRPQOT106:Ship To Customer Addressee@>
Ship to Customer Address Line 1	HZ_LOCATIONS	ADDRESS 1	Field Code: PRPQOT107 RTF Display: <@PRPQOT107:Ship To Customer Address Line 1@>
Ship to Customer Address Line 2	HZ_LOCATIONS	ADDRESS 2	Field Code: PRPQOT108 RTF Display: <@PRPQOT108:Ship To Customer Address Line 2@>

Table A-5 Quote Header: Customer

Dynamic field Name	Table	Table Column	Comment
Ship to Customer City	HZ_LOCATIONS	CITY	Field Code: PRPQOT109 RTF Display: <@PRPQOT109:Ship To Customer City@>
Ship to Customer State	HZ_LOCATIONS	STATE	Field Code: PRPQOT110 RTF Display: <@PRPQOT110:Ship To Customer State@>
Ship to Customer ZIP	HZ_LOCATIONS	POSTAL_CODE	Field Code: PRPQOT111 RTF Display: <@PRPQOT111:Ship To Customer ZIP@>
Ship to Customer County	HZ_LOCATIONS	COUNTY	Field Code: PRPQOT112 RTF Display: <@PRPQOT112:Ship To Customer County@>
Ship to Customer Province	HZ_LOCATIONS	PROVINCE	Field Code: PRPQOT113 RTF Display: <@PRPQOT113:Ship To Customer Province@>
Ship to Customer Country	HZ_LOCATIONS	COUNTRY	Field Code: PRPQOT114 RTF Display: <@PRPQOT114:Ship To Customer Country@>

A.2.6 Quote Dynamic Fields - Header: Pricing

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

Table A-6 Quote Header: Pricing

Dynamic field Name	Table	Table Column	Comment
Price List Name	QP_LIST_HEADERS_TL	NAME	Field Code: PRPQOT056 RTF Display: <@PRPQOT056:Price List Name@> Priority 2
Currency Code	ASO_QUOTE_HEADERS	CURRENCY_CODE	Field Code: PRPQOT023 RTF Display: <@PRPQOT023:Currency Code@>
Total List Price	ASO_QUOTE_HEADERS	TOTAL_LIST_PRICE	Field Code: PRPQOT024 RTF Display: <@PRPQOT024:Total List Price@>
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@>
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@>
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@>

Table A-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@>
Total Charges	ASO_QUOTE_HEADERS	TOTAL_SHIPPING_CHARGE	Field Code: PRPQOT029 RTF Display: <@PRPQOT029:Total Charges@>
Total Quote Price	ASO_QUOTE_HEADERS	TOTAL_QUOTE_PRICE	Total adjusted amount plus total tax and total shipping charge. Field Code: PRPQOT030 RTF Display: <@PRPQOT030:Total Quote Price@>
Price List Name	QP_LIST_HEADERS_TL	NAME	Field Code: PRPQOT056 RTF Display: <@PRPQOT056:Price List Name@>
Agreement Name	OE_AGREEMENTS_TL	NAME	Field Code: PRPQOT057 RTF Display: <@PRPQOT057:Agreement Name@>
Header Charge Information	ASO_PRICE_ADJUSTMENTS_V	MODIFIER_DESCRIPTION CHARGE_TYPE_CODE CHARGE_SUBTYPE_CODE	Field Code: PRPQOT170 RTF Display: <@PRPQOT170:Header Charge Information@>
Header Charge Amount	ASO_PRICE_ADJUSTMENTS_V	ADUSTED_AMOUNT	Field Code: PRPQOT171 RTF Display: <@PRPQOT171:Header Charge Amount@>

A.2.7 Quote Dynamic Fields - Header: Contract

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

Table A-7 Quote Header - Contract

Dynamic field Name	Table	Table Column	Comment
Contract Number	OKC_K_HEADERS_B	CONTRACT_NUMBER OBJECT_VERSION_NUMBER	Field Code: PRPQOT059 RTF Display: <@PRPQOT059:Contract Number@>
Contract Section	OKC_K_HEADERS_B	CONTRACT_SECTION	Field Code: PRPQOT031 RTF Display: <@PRPQOT031:Contract Section@>
Contract Article	OKC_K_HEADERS_B	CONTRACT_ARTICLE	Field Code: PRPQOT032 RTF Display: <@PRPQOT032:Contract Article@>
Contract Standard Text	OKC_K_HEADERS_B	CONTRACT_STANDARD_TEXT	Field Code: PRPQOT033 RTF Display: <@PRPQOT033:Contract Standard Text@>
Contract Non Standard Text	OKC_K_HEADERS_B	CONTRACT_NON_STANDARD_TEXT	Field Code: PRPQOT034 RTF Display: <@PRPQOT034:Contract Non Standard Text@>

A.2.8 Quote Dynamic Fields - Header: Payment

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

Table A-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@>

Table A–8 Quote Header - Payment

Dynamic field Name	Table	Table Column	Comment
Payment Type	ASO_PAYMENTS	PAYMENT_TYPE_CODE	Field Code: PRPQOT036 RTF Display: <@PRPQOT036:Payment Type@>
PO Number	ASO_PAYMENTS	CUST_PO_NUMBER	Field Code: PRPQOT037 RTF Display: <@PRPQOT037:PO Number@>
Check Number	ASO_PAYMENTS	PAYMENT_REF_NUMBER	Field Code: PRPQOT038 RTF Display: <@PRPQOT038:Check Number@>
Credit Card Type	ASO_PAYMENTS	CREDIT_CARD_CODE	Field Code: PRPQOT039 RTF Display: <@PRPQOT039:Credit Card Type@>
Credit Card Number	ASO_PAYMENTS	CREDIT_CARD_NUMBER	Field Code: PRPQOT040 RTF Display: <@PRPQOT040:Credit Card Number@>
Credit Card Holder Name	ASO_PAYMENTS	CREDIT_CARD_HOLDER_NAME	Field Code: PRPQOT041 RTF Display: <@PRPQOT041:Credit Card Holder Name@>
Credit Card Expiration	ASO_PAYMENTS	CREDIT_CARD_EXPIRATION_DATE	Field Code: PRPQOT042 RTF Display: <@PRPQOT042:Credit Card Expiration@>

A.2.9 Quote Dynamic Fields - Header: Attachment

This table lists the **Quote Header: Attachment** seeded dynamic fields.

Table A-9 Quote Header - Attachment

Dynamic field Name	Table	Table Column	Comment
Header Attachment Description	FND_DOCUMENTS_VL	DESCRIPTION	Field Code: PRPQOT160 RTF Display: <@PRPQOT160:Header Attachment Description@>
Header Attachment Text	FND_LOBS	FILE_DATA	Field Code: PRPQOT161 RTF Display: <@PRPQOT161:Header Attachment Text@>

A.2.10 Quote Dynamic Fields - Lines: General

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

Table A-10 Quote Lines: General

Dynamic field Name	Table	Table Column	Comment
Item Number	MTL_SYSTEM_ITEMS	ITEM_NUMBER	Field Code: PRPQOT043 RTF Display: <@PRPQOT043:Item Number@>
Product Description	MTL_SYSTEM_ITEMS	PRODUCT_DESC	Field Code: PRPQOT044 RTF Display: <@PRPQOT044: Product Description@>
Unit of Measure	ASO_QUOTE_LINES_ALL	UOM_CODE	Field Code: PRPQOT045 RTF Display: <@PRPQOT045:Unit of Measure@>
Line Quantity	ASO_QUOTE_LINES_ALL	QUANTITY	Field Code: PRPQOT046 RTF Display: <@PRPQOT046:Line Quantity@>

Table A-10 Quote Lines: General

Dynamic field Name	Table	Table Column	Comment
Line Type	ASO_QUOTE_LINES_ALL	ORDER_LINE_TYPE_ID	Field Code: PRPQOT047 RTF Display: <@PRPQOT047:Line Type@>
Line Number	ASO_PVT_QUOTE_LINES_BALI_V	UI_LINE_NUMBER	Field Code: PRPQOT330 RTF Display: <@PRPQOT330:Line Number@>
Line Service Start Date	ASO_QUOTE_LINES_ALL	START_DATE_ACTIVE	Field Code: PRPQOT331 RTF Display: <@PRPQOT331:Line Service Start Date@>
Line Service End Date	ASO_QUOTE_LINES_ALL	END_DATE_ACTIVE	Field Code: PRPQOT332 RTF Display: <@PRPQOT332:Line Service End Date@>
Line Service Number	ASO_QUOTE_LINE_DETAILS	SERVICE_NUMBER	Field Code: PRPQOT333 RTF Display: <@PRPQOT333:Line Service Number@>
Line Service Period	ASO_QUOTE_LINE_DETAILS	SERVICE_PERIOD	Field Code: PRPQOT334 RTF Display: <@PRPQOT334:Line Service Period@>
Line Service Duration	ASO_QUOTE_LINE_DETAILS	SERVICE_DURATION	Field Code: PRPQOT335 RTF Display: <@PRPQOT335:Line Service Duration@>
Item Long Description	MTL_SYSTEM_ITEMS	LONG_DESCRIPTION	Field Code: PRPQOT336 RTF Display: <@PRPQOT336:Item Long Description@>

A.2.11 Quote Dynamic Fields - Lines: Pricing

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

Table A-11 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@>
Line Unit Adjustment Amount	ASO_QUOTE_LINES_ALL	LINE_ADJUSTMENT_AMOUNT	Field Code: PRPQOT049 RTF Display: <@PRPQOT049:Line Unit Adjustment Amount@>
Line Unit Adjustment Percent	ASO_QUOTE_LINES_ALL	LINE_ADJUSTMENT_PERCENT	Field Code: PRPQOT050 RTF Display: <@PRPQOT050:Line Unit Adjustment Percent@>
Line Total Selling Price	Calculated	LINE_QUOTE_PRICE*QTY	Field Code: PRPQOT052 RTF Display: <@PRPQOT052:Line Total Selling Price@>
Line Unit Selling Price	ASO_QUOTE_LINES_ALL	LINE_QUOTE_PRICE	Field Code: PRPQOT051 RTF Display: <@PRPQOT051:Line Unit Selling Price@>
Line Charge Information	ASO_PRICE_ADJUSTMENTS_V	MODIFIER_DESCRIPTION CHARGE_TYPE_CODE CHARGE_SUBTYPE_CODE	Field Code: PRPQOT310 RTF Display: <@PRPQOT310:Line Charge Information@>

Table A–11 Quote Lines: Pricing

Dynamic field Name	Table	Table Column	Comment
Line Charge Amount	ASO_PRICE_ADJUSTMENTS_V	ADJUSTED_AMOUNT	Field Code: PRPQOT311 RTF Display: <@PRPQOT311:Line Charge Amount@>
Line Tax Code	ASO_TAX_DETAILS	TAX_CODE	Field Code: PRPQOT320 RTF Display: <@PRPQOT320:Line Tax Code@>
Line Tax Rate	ASO_TAX_DETAILS	TAX_CODE	Field Code: PRPQOT321 RTF Display: <@PRPQOT321:Line Tax Rate@>
Line Tax Amount	ASO_TAX_DETAILS	TAX_AMOUNT	Field Code: PRPQOT322 RTF Display: <@PRPQOT322:Line Tax Amount@>

A.2.12 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 A–12 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

Table A-12 Structure Dynamic Fields

Group	Entry Values	Field Name	Description
Quote Structure - Header	Field Code: PRPSTR002 RTF Display: <@PRPSTR002:End Quote@>	End Quote	Control structure to indicate quote end
Quote Structure - Header	Field Code: PRPSTR015 RTF Display: <@PRPSTR015:Begin Quote Category Sub Total@>	Begin Quote Category Sub Total	Control structure to indicate quote category subtotal beginning.
Quote Structure - Header	Field Code: PRPSTR016 RTF Display: <@PRPSTR016:End Quote Category Sub Total@>	End Quote Category Sub Total	Control structure to indicate quote category subtotal ending.
Quote Structure - Header	Field Code: PRPSTR017 RTF Display: <@PRPSTR017:Begin Quote Header Attachment Text@>	Begin Quote Header Attachment Text	Control structure to indicate quote header attachment text beginning.
Quote Structure - Header	Field Code: PRPSTR018 RTF Display: <@PRPSTR018:End Quote Header Attachment Text@>	End Quote Header Attachment Text	Control structure to indicate quote header attachment text end.
Quote Structure - Header	Field Code: PRPSTR019 RTF Display: <@PRPSTR019:Begin Quote Header Charges@>	Begin Quote Header Charges.	Control structure to indicate quote header charges beginning.

Table A–12 Structure Dynamic Fields

Group	Entry Values	Field Name	Description
Quote Structure - Header	Field Code: PRPSTR020 RTF Display: <@PRPSTR020:End Quote Header Charges@>	End Quote Header Charges.	Control structure to indicate quote header charges end.
Quote Structure - Header	Field Code: PRPSTR021 RTF Display: <@PRPSTR021:Begin Quote Header Tax@>.	Begin Quote Header Tax.	Control structure to indicate quote header tax beginning.
Quote Structure - Header	Field Code: PRPSTR022 RTF Display: <@PRPSTR022:End Quote Header Tax@>	End Quote Header Tax.	Control structure to indicate quote header tax 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 - Line	Field Code: PRPSTR031 RTF Display: <@PRPSTR031:Begin Quote Line Attachment Text@>	Begin Quote Line Attachment Text	Control structure to indicate quote line attachment text beginning.

Table A-12 Structure Dynamic Fields

Group	Entry Values	Field Name	Description
Quote Structure - Line	Field Code: PRPSTR032 RTF Display: <@PRPSTR032:End Quote Line Attachment Text@>	End Quote Line Attachment Text	Control structure to indicate quote line attachment text end.
Quote Structure - Line	Field Code: PRPSTR033 RTF Display: <@PRPSTR033:Begin Quote Line Charges@>	Begin Quote Line Charges	Control structure to indicate quote line charges beginning.
Quote Structure - Line	Field Code: PRPSTR034 RTF Display: <@PRPSTR034:End Quote Line Charges@>	End Quote Line Charges	Control structure to indicate quote line charges end.
Quote Structure - Line	Field Code: PRPSTR035 RTF Display: <@PRPSTR035:Begin Quote Line Tax@>	Begin Quote Line Tax	Control structure to indicate quote line tax beginning.
Quote Structure - Line	Field Code: PRPSTR036 RTF Display: <@PRPSTR036:End Quote Line Tax@>	End Quote Line Tax	Control structure to indicate quote line tax 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

Table A-12 Structure Dynamic Fields

Group	Entry Values	Field Name	Description
Quote Structure – Contract	Field Code: PRPSTR007 RTF Display: <@PRPSTR007:Begin Contract Article@>	Begin Contract Article	Control structure to indicate contract article beginning
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

Dynamic Field Structure in RTF Files

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

- [Section B.1, "RTF Representation of a Quote"](#)
- [Section B.2, "Example of a Quote in an RTF File"](#)
- [Section B.3, "Quote Related Dynamic Field Scenarios"](#)
- [Section B.4, "Control Structure Rules"](#)
- [Section B.5, "Example of RTF Document with Dynamic Fields"](#)
- [Section B.6, "Warnings"](#)
- [Section B.7, "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.

B.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@>

```

B.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

B.3 Quote Related Dynamic Field Scenarios

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 B-1 Scenario 1: Quote Related Field Without, or Outside Control Structure

Field	Token
Quote:	Proposal: <PRP001:Proposal Name@>
<@PRPQOT001:Quote Name@>	

Table B–1 Scenario 1: Quote Related Field Without, or Outside Control Structure

Field	Token
<@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 B–2 Scenario 1: Output

Output Data	Output Data
Quote: Simple Solution	Proposal: Business Network Proposal
<i>Laptop</i>	<i>\$2500</i>

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 B–3 Scenario 2: Quote Related Fields Within the Header and Control Structure

Field	Token
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 B-4 Scenario 2: Output

Output Data	Output Data
Quote: Simple Solution	Proposal: Business Network Proposal
Laptop	\$2500
Quote: Custom Solution	Proposal: Business Network Proposal
Custom Laptop	\$5000

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 B-5 Scenario 3: Quote Related Fields Within the Header and Line Structure

Field	Token
Quote:	Proposal: <PRP001:Proposal Name@>
<@PRPQOT001:Quote 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 B-6 Scenario 3: Output

Output Data	Output Data
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.

B.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.

B.5 Example of RTF Document with Dynamic Fields

Following is sample text for an RTF document containing dynamic fields. For this example, a simple cover letter has been created using proposal seeded dynamic fields and two user defined dynamic fields. The user defined dynamic fields allow

the user to provide personalized text in the body section and a date dynamic field to add even further personalization.

July XX, 200X

<@PRP007:Contact Name@>

<@PRP006:Customer Name@>

Dear <@PRP007:Contact Name@>,

<@UDF004:Cover Text@>

As a Vision Enterprises customer, you already use our desktops to increase productivity in critical areas of your business. I invite you to review the attachments enumerating some of the key benefits of upgrading your systems. I can be reached at <@PRP013:Sales Rep Phone Number@> or via email at <@PRP015:Sales Rep Email@>.

I would appreciate if we can do a follow-up call on <@UDF006: Follow-up Date@>.

Sincerely,

<@PRP012:Sales Rep Name@>

Account Manager

Vision Enterprises

B.6 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.

B.7 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, the following formats are valid:
 - <@PRP001: Proposal Name@>
 - <@PRP001:Proposal Name@>
 - <@PRP001:Proposal Name @>
 - The following formats are not valid:
 - <@PRP001 :Proposal Name@>
 - < @PRP001:Proposal Name@>

<@ PRP001:Proposal Name@>

<@PRP001: Proposal Name@ >

Invalid entries throw an error.

- 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.

Creating Java Program Dynamic Fields

This appendix contains details, guidelines, and code sample for creating Java program dynamic fields. Topics include:

- [Section C.1, "Database Connection/Transaction"](#)
- [Section C.2, "View Object"](#)
- [Section C.3, "Registering Your Java Program"](#)
- [Section C.4, "Java Program in Generated Proposal Versions"](#)

Refer to [Section 3.3.2, "Creating User Defined Dynamic Fields"](#) of Chapter 3 for information additional information on creating Java program dynamic fields.

C.1 Database Connection/Transaction

Users can reuse the same database connection (transaction) that is used to generate the proposal document. They can also create their own database connection, connecting to same database or different database. Please see below for explanation of benefits/disadvantages of using each approach.

C.1.1 Reusing the same database connection

If you use the same transaction or database connection, you can get profile option values, user details, etc., for the user who is generating the proposal. You can get the connection object by using the statement:

```
Connection con = oaDbTransaction.getJdbcConnection();
```

Note: There should not be any commits or rollbacks in the Java program, if you are reusing the connection.

C.1.2 Creating new database connection

You can create your own connection, but you will not be able to make use of profile option values, user details, etc. You can create a connection to any database, provided you have access to that database from the middle tier when Oracle Proposals code is running.

C.2 View Object

If you have defined a **View Object** earlier and want to use it to get data from other tables, you need to create it on the transaction and execute the query. Refer to [Appendix C.4.1, "Sample Code Program"](#) for details.

If you use the **View Object**, the BC4J layer will take care of preparing the SQL statement. Also, the **View Object** meta data (SQL statement) will be cached, ensuring that subsequent executions will be faster.

C.3 Registering Your Java Program

Once you have written a program, compile the program to get the class file and copy the class file into a directory that is included in the `classpath`. You can also add a new directory to the `classpath`, but you will need to restart your apache middle tier(s). Create a dynamic field, choose the type as Java program and then associate the package.class.method with it. Please refer to [Chapter 3.3.2.3, "Creating Java Program Dynamic Fields"](#) for further instructions.

When you register the Java program, Oracle Proposals will validate whether the Java class file is accessible to the middle tier and if the method contains **Hashtable** as an input parameter and returns a **String**. It is therefore important to follow the above steps before creating the dynamic field.

C.4 Java Program in Generated Proposal Versions

While generating the proposal version, Oracle Proposals will call the Java program, get the String value and replace the dynamic field with the returned value in the generated document. If there is an error while calling the program, Oracle Proposals will replace the dynamic field with blank space in the generated document.

This sample code program contains two methods.

- **Method `getUserLanguageGreeting`**: prints greetings in the generated proposal depending on the users' language, which is the language user logs in to the

application. For this it gets the user language from the View Object UserLanguageVO (In /oracle/apps/prp/common/server directory).

- **Method getSystemTime:** prints the current system time while generating the proposals document.

C.4.1 Sample Code Program

```
package oracle.apps.prp.example.server;

import java.sql.Connection;
import java.sql.Timestamp;
import java.util.Date;
import java.util.Hashtable;
import oracle.apps.fnd.framework.OAViewObject;
import oracle.apps.fnd.framework.server.OADBTransaction;
import oracle.jbo.Row;
import oracle.jbo.domain.Number;

public class PRPJavaTokenExample
{

    //Empty constructor
    public PRPJavaTokenExample()
    {
    }

    //Method to get the System Time.
    public String getSystemTime(Hashtable hash)
    {
```

```
        return new Timestamp(new Date().getTime()).toString();
    }

    //Method to get the Greeting in User Language.
    public String getUserLanguageGreeting(Hashtable hash)
    {
        String greeting = "Greetings!";

        //Get the Proposal Id. Notice that the proposalId is
        //casted to oracle.jbo.domain.Number
        Number proposalId = (Number)hash.get("proposalId");
        OAViewObject UserLanguageVO = null;

        //get the OADBTransaction
        OADBTransaction oaDbTransaction =
        (OADBTransaction)hash.get("oaDbTransaction");

        // Connection con = oaDbTransaction.getJdbcConnection();
        //You will need the connection, if you are using JDBC to
        //construct and execute the sql statement.

        // Check if the transaction exists
        if (oaDbTransaction != null)
        {
            try
            {
                // Create the View Object UserLanguageVO and execute
                //the Query.
                UserLanguageVO =
```

```
(OAViewObject)oaDbTransaction.createViewObject("oracle.apps.pr
p.common.server.UserLanguageVO");
    UserLanguageVO.invokeMethod("executeQuery");
    while (UserLanguageVO.hasNext())
    {
        //Get the first row. This sql only returns one row.
        Row rowUserLanguageVO = UserLanguageVO.next();
        //Get the language code value from the view object.
        String languageCode =
(String)rowUserLanguageVO.getAttribute("LanguageCode");
        if (languageCode.equals("US"))
        {
            greeting = "Hello World!!";
        }
        else if (languageCode.equals("FR"))
        {
            greeting = "Bonjour Monde!";
        }
        else if (languageCode.equals("E"))
        {
            greeting = "Hola Mundo!";
        }
        else if (languageCode.equals("D"))
        {
            greeting = "Hallo Welt!";
        }
        else
        {
```

```
        greeting = "Hello!";
    }
}
return greeting;
}
catch (Throwable ex)
{
    return "<Unexpected Error! (Creating VO)>";
}
}
else
{
    return "<Unexpected Error!>";
}
}
}
```

Permissions for Oracle Content Manager

This section describes the permissions that are needed or recommended for the Oracle Content Manager (OCM) Folders and Library categories. These permissions are only needed if your system administrator has set the **IBC: Use Access Control** profile option to **Yes**.

D.1 Seeded Folders

Table D-1 Seeded Folders

Folder Directory	Seeded for:	Recommended Access (given by OCM Administrator)
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

D.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 D-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

D.3 Add File from Desktop flow

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

Table D–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

D.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 D–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.

D.5 Browse and Search Folders and Library Categories

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

Table D-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.

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 concatenated 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 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.

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