Oracle® Proposals

User Guide

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Oracle Proposals User Guide, Release 12.2

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Proposals User Guide.*

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

- The principles and customary practices of your business area.
- Oracle Proposals - If you have never used Oracle Proposals, Oracle suggests you attend one or more of the Oracle Proposals training classes available through Oracle University.
- The Oracle Applications graphical user interface - To learn more about the Oracle Applications graphical user interface, read the Oracle E-Business Suite User's Guide.
- See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

The Oracle Proposals User Guide contains the information you need to understand and use Oracle Proposals.

- Chapter 1 - discusses the key features and process flows of Oracle Proposals.
- Chapter 2 - provides and overview of the user interface, and the administration tasks needed for using Oracle Proposals.
- Chapter 3 - provides instructions on administering template categories, templates, proposals, components, and dynamic fields.
- Chapter 4 - provides instructions for accessing and searching for proposals.

- Chapter 5 - provides instructions for creating and deleting proposals.
- Chapter 6 - provides instructions for personalizing, generating, and maintaining the proposal content.
- 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

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.

See Related Information Sources on page xi for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

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Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to This Product

Oracle Content Manager Implementation and Administration Guide

Oracle Content Manager ensures accurate and consistent content across applications by providing a central repository for storing and managing content. Oracle Content Manager integrates with Oracle E-Business Suite to enable the seamless transition of content between applications. This integration facilitates single user sign-on to associate content such as product images, white papers, and newsletters with E-Business objects such as store sections, inventory products, and marketing campaigns.

Oracle Proposals Implementation Guide

Oracle Proposals enables sales representatives to generate proposals in the field from templates created and published by sales administrators. This guide describes how to set up different proposal users, and install and integrate with the applications that you need to create and maintain proposals such as Oracle Sales, Oracle Telesales, Oracle Quoting, Oracle Marketing, Oracle Content Manager, and Oracle Trading Community Architecture.

Oracle Quoting User Guide

Oracle Quoting enables you to create and manage customer quotes across all sales and interaction channels and if approved by the customer, convert these quotes into orders. This guide describes how to create and modify quote templates, add and configure simple and related products, manage pricing and pricing adjustments, determine customer credit worthiness, and perform real-time global product availability checks.

Oracle Sales User Guide

Oracle Sales enables sales professionals plan and manage the sales process from leads to opportunities to quotes including the tracking of competitors for products within opportunities. It is integrated in the E-Business Suite and optimized for use with wireless. You can use the sales dashboard to view open opportunities, proposals, quotes, top customers, leads by age and by campaign, the latest sales forecast, and your calendar tasks.

Oracle TeleSales User Guide

Oracle TeleSales enables telesales agents manage the sales cycle, from prospects to booked orders. It offers a multi-channel selling solution that leverages all sales channels: whether selling over the phone, through the web or through mobile devices. Its E-Business Center offers a cross-application desktop for all Oracle call center applications, and provides elements of Service and Collections for a comprehensive customer view. You can use Oracle TeleSales for comprehensive customer management, list generation, lead, opportunity, and pipeline management, quote and order generation, event registration and collateral fulfillment.

Oracle Territory Manager User Guide

Oracle Territory Manager enables you to distribute sales and after sales tasks by geographical location, account, task priority, and resource skills. Oracle Sales, Oracle Field Service, Oracle Service Contracts, Oracle Collections, Oracle Partner Manager, and Oracle Channel Revenue Management all use Oracle Territory Manager to define ownership of transactions.

Oracle Trading Community Architecture Administration Guide

This guide enables you to define entities in the TCA Registry, create relationships, search, prevent duplication, and control access. In addition, you can use this guide to define time zones and phone formats, configure adapters for the processing of data in the TCA Registry, define sources that provide data for specific entities, and create user-defined attributes to extend the registry. You can administer these TCA tools and features from the Administration tab using the Trading Community Manager responsibility. This tab is also available in Oracle Customers Online and Oracle Customer Data Librarian.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

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

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle e-Commerce Gateway Implementation Guide

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle

E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

Training and Support

Training

Oracle offers a complete set of training courses to help you master your product 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 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 your product 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.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

1

Introduction to Oracle Proposals

This chapter covers the following topics:

- Overview
- Oracle Proposals Key Features
- Oracle Proposals Integrations

Overview

A proposal is a document that is presented to a customer to position a product or service as a solution to the customer's business needs. 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 of your organization
- Free yourself to work with customers by automating the proposal process

Oracle Proposals streamlines and centralizes proposal creation by automating proposal creation 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.

Oracle Proposals has three types of users:

- **Sales Representatives**: who create proposals and send them to customers
- **Sales Managers**: who review the proposals created by their subordinates
- **Administrators**: who create and maintain proposal templates

Oracle Proposals Key Features

Oracle Proposals includes the following features:

Leads Integration

Oracle Proposals is integrated with leads in Oracle Sales. This integration allows the user 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 activity, the proposal template associated with the campaign activity is automatically used.

Opportunity Integration

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

Proposal Creation

Users can create a proposal from a quote, opportunity, lead, or for a customer. Users can also create a standalone proposal in which the user provides the customer name and, optionally a contact name. Users select a proposal template which is made up of component documents in RTF format. From the opportunity, lead, and customer, the customer name is carried over along with a contact if one is available. A contact is available only in the case of Business-to-Business (B2B) customers.

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.

Content Management Integration

Oracle Proposals is now integrated with Oracle Content Manager (OCM). This integration allows users to store and reuse content when constructing proposals. 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.

Campaign Activity Integration

Oracle Proposals is also integrated with campaign activities in Oracle Marketing. This integration allows association of a proposal template to a campaign activity in Oracle Marketing.

Customer Integration

Oracle Proposals is integrated with customer in Oracle Telesales and Oracle Sales. This integration allows Oracle Proposals users to create a proposal from a customer, where information from the customer and contact is pulled into the proposal during the proposal creation process.

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 values that are provided in the application or that you enter. The values of the dynamic fields are populated when you generate the proposal.

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, Oracle Content Manager Library or Oracle Content Manager Folders.

Proposals Page

The Proposals page lists existing proposals and enables users to initiate proposal creation. Proposals are displayed across languages.

Proposal Update Page

The Proposal Update page enables users to update an existing proposal and displays tabs that contain overall proposal information, generated documents, correspondence related to the proposal, notes and tasks, and sales team members who can work on the proposal. Notes and tasks functionality is available through integration with the Oracle Common Application Calendar.

Proposal Document Generation

After users have built the proposal content, they can generate a proposal document in RTF or PDF format. This document is the physical file that is shared with the customer. Users can regenerate documents as often as needed. Each generated document exists as a new version and is stored in the database. PDF document conversion is available through integration with Oracle XML Publisher.

Supporting Documents for Proposals

Users can add supporting documents to their proposals. These documents are optional, and can be of any file format. These optional documents can be added from the desktop, from the Oracle Content Manager library or folder, or from suggested content based on the proposal components.

E-Mail Delivery

Using Oracle Proposals, users can send proposals by e-mail, including their supporting documents, 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. The application saves a record of the e-mail delivery, under the customer name, in Interaction History, if the recipient is in the customer's contact list.

When you e-mail the proposal to someone outside the customer's contact list, then the application will not save the e-mail interaction. All e-mail history, however, is captured and displayed in the Correspondence tab for a given proposal.

Proposal Views

Oracle Proposals enables you to save searches for future use. These saved searches, called views, control the display of data on the Proposals . You can use the views provided with Oracle Proposals or you can create your own views.

Proposal Searches

Users can perform searches on criteria such as proposal name, customer data, creation or due date and can save searches.

Oracle Proposals is integrated with Oracle Trading Community Architecture (TCA). The Data Quality Management (DQM) functionality in TCA allows for expanded customer and contact search capabilities and minimizes the creation of duplicate parties. When DQM is enabled, the fields that you see in the Simple and Advanced Search: Person or Organization pages, are dynamically generated based on system settings.

Proposal Templates

Oracle Proposals uses proposal templates, which are predefined, standard 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 and components, and determine component order. The template category and name help users select the most appropriate template for each proposal.

When an administrator uploads an updated proposal template component, users are notified that the component has been updated when they access the proposal using the updated component.

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 might 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 Rich Text Format (RTF) files that store content such as standard text, graphs, tables or, dynamic fields. Users can create these RTF files using Microsoft Word, use them in proposal components, and store them in Oracle Content Manager for reuse.

Suggested Content

Oracle Proposals enables users to add suggested content. The suggested content choices are based on the components associated with the proposal, or the associated quote, opportunity, or lead. For example, if a proposal contains a component pertaining to a server, suggested content might be a data sheet for that server.

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 dynamic fields inserted into the locations 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, including images. Images can be of the types JPG, JPE, PNG, JPEG, or JFIF. Images can be uploaded from the desktop, Oracle Content Manager folder, or Oracle Content Manager library.

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.

Sales Team Collaboration on Proposals

Several team members may be required to work on an opportunity or a lead. The Sales team tab on the Proposal Update page enables users to manage this team effort, containing a table listing the sales representatives and sales managers who are collaborating on a proposal. Sales team members can have full or read only access to the proposal.

Interface Navigation Features

- **Link trail:** As you navigate through Oracle Proposals, the links to the pages you have visited are shown at the top of your current page. For example: Proposals > Proposal Update. Use these links to navigate back through the product.

- **Sortable table columns:** Many table columns are sortable in Oracle Proposals. Clicking the column heading sorts the data in ascending or descending order.

- **Tabs:** Access the various features from the tabs in the interface.

- **< Previous and Next >:** Links that enable you to view the next available group of items in a table, or to navigate back to the previously listed group of items.

- **Show/Hide:** Click Show to expand a region and display further information. Click Hide to compress the information.

- **Asterisks (*):** Fields with asterisks denote required information.

- **Partial page refresh:** This feature displays the changed portion of a page without waiting for the entire page to refresh. For example, if you are viewing a table of proposals, you can select a radio button next to a proposal and details about that proposal are displayed below the table. When you select a different proposal, the information shown below the table is refreshed with details on the newly-selected proposal.

Oracle Proposals Integrations

Listed in the following sections is basic information on Oracle Proposals integrations. Please see the *Oracle Proposals Implementation Guide* for more details.

Oracle Product Integrations

- **Oracle Trading Community Architecture**: Trading Community Architecture (TCA) is a model for maintaining complex information about customers who belong to an entity's commercial community. It is the single source of customer information that all Oracle E-Business Suite applications use. Proposals uses 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. See the *Oracle Trading Community Architecture Administration Guide*.

- **Oracle Customer Interaction History**: Customer Interaction History is a repository that holds an audit trail of all interactions that a business performs with a customer or a potential customer. See the *Oracle Customer Interaction History Implementation Guide*.

- **Oracle Content Manager:** Content Manager is a central repository for all content that is used for storing and reusing RTF files for Oracle Proposals. The repository is accessed either through folders or library categories. See the *Oracle Content Manager Implementation and Administration Guide*.

- **Oracle Quoting**: If Oracle Proposals is implemented with Oracle Quoting, you 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* and the *Oracle Quoting User Guide.*

- **Oracle Marketing**: If Oracle Proposals is implemented with Oracle Marketing, you can associate proposal templates to campaign activities in Oracle Marketing. When these activities 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* and the *Oracle Marketing User Guide.*

- **Oracle TeleSales**: If Oracle Proposals is implemented with Oracle Telesales, you can create proposals from an opportunity or customer in Oracle Telesales.

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

- **Oracle Sales**: If Oracle Proposals is implemented with Oracle Sales, you can create proposals from an opportunity, lead, or customer.

  For more information, see the *Oracle Sales User Guide*.

Third Party Integrations

Oracle Proposals generates proposal documents in RTF (Rich Text Format) format viewable in any third party word processor. Proposals, in integration with Oracle XML Publisher, generates proposals in the Portable Document Format (PDF) format viewable from Adobe Reader. Integration with word processing and XML publishing programs is necessary to:

- Store standard component content, including dynamic fields and formatting style.
- Generating proposal documents.
- Previewing proposal documents.

A data compression application might be required to decompress generated proposal documents.

Also, a standard PDF reader should be installed to enable you to preview documents in PDF format.

2

Overview of Using Oracle Proposals

This chapter covers the following topics:

- Logging In to Oracle Proposals in Self Service Mode
- Accessing the Proposals page
- Accessing the Oracle Proposals Administrator Interface
- Summary of Oracle Proposals Tasks

Logging In to Oracle Proposals in Self Service Mode

Responsibilities

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

Accessing the Proposals page

The Proposals page is the gateway for viewing, creating, and updating existing proposals. This is the home page 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 subtab of the application unless they have also been given the Proposal Main Menu or have the Oracle Proposals Administrator responsibility. Please see "Setting up Users" of the *Oracle Proposals Implementation Guide* for 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.

Accessing the Oracle Proposals Administrator Interface

The proposal administrator is a user who has the responsibility of creating and maintaining the proposal templates for a group. End users cannot create proposals until the templates exist and other administrative tasks have been performed.

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.

Related Topics

See Chapter Configuring Oracle Proposals, page 3-1

Summary of Oracle Proposals Tasks

The following is a summary of administrative and user proposal tasks.

Administrator Proposal Creation Overview

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

Administrator - Creating Proposals Overview

Steps	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.
5	Publish template.
6	Initiate proposal creation.
7	Select template.

Steps	Task
8	Provide the following: • Proposal Name • Customer Name - Search for customer. Customer name defaults from quote, lead, 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.

User Proposal Creation Overview

The following table shows the proposal creation process for an end user.

User - Creating Proposals Overview

Steps	Task
1	Initiate proposal creation.
2	Select Template.

Steps	Task
3	Provide the following: • Proposal Name • Customer Name - Search for customer. Customer name defaults from quote, opportunity, lead or customer if proposal is created from one of those modules. • Due Date • Contact (if the customer is an organization)
4	Create proposal
5	Verify proposal is created successfully. Check confirmation message.
6	Verify/modify proposal components, and their content and order, if needed.

3

Configuring Oracle Proposals

This chapter covers the following topics:

- Overview
- Template Categories
- Defining Quoting and Proposals Dynamic Fields
- Setting Up User Defined Dynamic Fields
- Setting Up Proposal Components
- Setting Up Proposal Templates
- Working with Proposal Templates from Campaign Activities
- RTF Files Overview
- Other Administrative Tasks

Overview

The proposal administrator is the user who is responsible for creating and maintaining proposal templates. This responsibility is not the same as the system administrator responsibility. Proposal administration tasks must be performed before users can create proposals. Administrators must set up:

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

Prerequisites

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.

When configuring Oracle Proposals, there are three phases of development:

- Planning
- Implementation
- Maintenance

Planning

The planning phase involves three major steps:

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

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

Implementation

Implementation tasks include:

- Build content (offline)
- Register dynamic fields
- Create template category
- Create components
- Create template
- Publish

The implementing phase occurs after the proposals administrator 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 proposals administrator now creates the pieces of information needed in the Proposals application. First, the dynamic fields that are inserted into RTF file created for each component version should be registered. The component versions should then be created as RTF files. Next, The proposals administrator must associate them with components. For instance, Cover Letter version A must be associated with the Cover Letter component. After the components have been created, the proposals administrator can then create a template and associate the components with the template. The template must also be assigned to a category, which determines access to that particular template. End users can filter groups of proposals by category when they select a template to use to create a proposal.

Maintenance

The maintenance phase includes:

- Translation
- Modification or Deletion
- Publish and Unpublish

As Oracle Proposals is used by the company's sales force, the administrator must be sure to make updates to dynamic fields, components, translated versions and templates as required.

> **Note:** To access Oracle Proposals, you must be a FND user and defined as a Resource in the Resource Manager.

Template Categories

Template categories define groups of templates by purpose or usage, enabling users to select the appropriate template while creating a proposal. Use the **Template Categories** page to view template category details and to create template categories. Use the **Create Template Category** page to create template categories. Use the **Template Category Detail** page to view and modify template category information.

Notes

- **Code**: A unique numeric code for the category is auto generated after you have entered all the fields in the Create Template Category Detail page. The code cannot be edited by users, and is not exposed to proposal creators.

Defining Quoting and Proposals Dynamic Fields

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

There are three 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 E-Business Suite are exposed as dynamic fields.

- **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 are used to access information about objects that reside within or outside the Oracle E-Business Suite. This enables the user to integrate Oracle or non-Oracle objects into Oracle Proposals.

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

- Image dynamic fields are supported. Images can be of the types JPG, JPE, JPEG, JFIF, or PNG. Images can be uploaded from the desktop, OCM folder, or OCM library.

After defining the dynamic fields, the next task is to create the components that use those dynamic fields.

Related Topics

- Setting Up Proposal Components, page 3-7

- Appendix A Seed Data, page A-1

- Appendix C, Creating Java Program Dynamic Fields, page C-1

Dynamic Fields: Proposal and Quote Pages

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.

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.

Notes

- **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 the dynamic fields within a file.

References

Oracle Proposals Conditional Dependencies, *Oracle Proposals Implementation Guide*

Setting Up User Defined Dynamic Fields

You can create dynamic fields any time, but the fields must exist before the RTF file, into which the dynamic field is later inserted, is created. 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 are displayed in the proposal creation user interface. Users can only pick from the drop-down values defined by the administrator.

- **Java program dynamic fields**: The Oracle Proposals administrator inserts a Java code program that pulls in data from a repository outside of Oracle Applications.

- **Image dynamic fields**: The Oracle Proposals administrator defines a browse field to enable users to add images to proposal components. Valid image formats include JPG, JPE, PNG, JPEG, or JFIF.

Creating User Defined Dynamic Fields

Use the **Create Dynamic Field: General Details** page to enter general details when creating a user defined dynamic field. Access the **Dynamic Field Detail** page for the appropriate dynamic field type:

- Text
- Drop-down
- Java Program
- Image

Notes

- **Code**: Enter a unique alphanumeric code. This code is not translatable, must not exceed 10 Unicode characters, and is not editable after it has been created.
- **Field Prompt:** View or enter a new prompt value. This is used to prompt users to enter a field value when creating a proposal created from a template containing this dynamic field.
- **Text Dynamic Field Creation:**
  - **Data Type**: If your data type choice is **Character**, enter a maximum length between one and two thousand. This value determines how many characters the text field holds. Any decimal values entered are rounded.
- **Drop-down Dynamic Field Creation:**
  - **Add Row**: Select to add multiple values
- **Java Program Dynamic Field Creation:**
  - **Program Name**: Enter the class and method name of the Java program to be executed.

    Example: `Class.Method`.

    The program name is not translatable. Any translations of the value must be handled within a single program. The Java file should already exist and be in `CLASSPATH`.
  - **Image Dynamic Field Creation:** Click **Next** to access the Review page.

Inserting Dynamic Fields in RTF Files

After you create a field, insert the code and field name into the corresponding RTF file for the component. Place your cursor in the exact position in the RTF file where the dynamic field should be inserted. 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 with '<@' and ending with '@>' with its value.

There must not be any spaces between the dynamic field code and the '<@' or colon '(:)'.

Related Topics

Creating RTF Files Guidelines, page 3-17

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 (are not referenced by an RTF file):

- **Type**
- **Data Type**
- **Maximum Display Length**
- **Drop-down value** (You can change this attribute, but cannot delete it if it is used.

Notes

- **Dynamic Field Code:** You cannot change the dynamic field code.

Deleting Dynamic Fields

Seeded dynamic fields cannot be deleted. You can delete user defined dynamic fields that are not used. Dynamic fields are in use if a component's file references them. You cannot delete drop-down dynamic field values if they are used in a proposal. Dynamic fields are in use whenever an RTF file references them.

Setting Up 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 a Cover Letter, Cover Sheet, or Data Sheet.

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*. Each file points to a separate RTF file, with its own individual content style. These files hold the actual content including standard text, graphs, or tables that are used as standard text 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 must 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)*

When you upload a new version of a template component file, the end users are notified that there is a new version of the file when they next access a proposal that uses that component. However, this does not affect generated proposals.

> **Note:** If you attempt to upload a proposal component that is in use, you will receive a message to that effect.

Then you translate the file name appropriate to the language (the code is not translatable).

Problems might 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, let us assume you create a customized style named *InternalUse* for the first component with the specification that it use the Font face Times New Roman and Size 12. The second component also contains a customized style called *InternalUse* but with a different specification of Font face Arial and Size 10. When the proposal is generated, it overrides the definition in the first component and converts the style *InternalUse* to have the specification of Font face Arial and Size 10.

Notes

- Log in to Oracle Proposals with the Proposals Administrator responsibility.
- Navigate to the Components page.

Related Topics

Multi-Language Functionality, page 3-12

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 files are associated with them. You can associate files from your desktop, and if the PRP: Use Oracle Content Manager profile option is set to Yes or Optional, you can also associate files from the Oracle Content Manager Folders or Library. In all three flows, you select the file and associate it to a component. You can add only RTF files to a component. Oracle Proposals parses and validates any files before they are added.

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

You can create proposal components by adding files from the desktop, or from Oracle Content Manager Folders or the Oracle Content Manager Library.

Oracle Proposals can only access files in Oracle Content Manager that are of RTF type, live, approved, and in the user's current session language. To associate a file for a different language, change the session language and select the component and associate the file.

Notes

- **Quick Create/Advance Create**: **Quick Create** allows for component creation with one file, while **Advance Create** allows component creation with multiple files.
- **Add Alternate File**: In the **Advance Create** flow, select the Add Alternate File button from the Alternate files for this component section to add multiple files from the desktop.
- **Save in Content Manager**: Visible when Content Manager is enabled. The default folder to store files is the seeded administrator folder. Permissions are needed to upload a file from the desktop to Oracle Content Manager Folders. An Oracle Content Manager administrator must grant folder access to the Oracle Proposals

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

- **Create Folder**: Visible when Oracle Content Manager is enabled, and you have chosen Yes in the Save in Content Manager field. Create a folder in Oracle Content Manager to save the file to, 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.

- **View Folder**: Visible when Oracle Content Manager is enabled, and you have chosen Yes in the Save in Content Manager field. 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, which takes you to the **View Folder Contents** page.

- **Simple Search**: Allows search on name, keyword and description. Simple search has limited fields to search from. Use Advanced Search to have more options.

- **Advanced Search**: Allows search on the file name, keywords, description, Library Category or Folder, owner, product, 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.

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

- **Focus**: Select the Focus icon beside each Library Category or Folder to view only that Category or Folder and files of RTF format within that category. Browse the Oracle Content Manager Library Categories or Folders for which you have permissions in Oracle Content Manager. Select category names or folder names to view the contents.

- **Navigate to Root Category/Folder**: You can go directly to the root Library Category or Folder by selecting the hyperlink.

Editing Components

You can do the following 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, log in to Oracle Proposals with the Proposals Administrator responsibility and navigate to the Components page.

Notes

- **Add Alternate File**: Add files by uploading files for a component from the desktop, Oracle Content Manager Library, or Oracle Content Manager Folders.
- **Delete**: 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.
- **Associate Version**: If the original file was added from an Oracle Content Manager Folder or from the Oracle Content Manager Library, you can select a new version from Oracle Content Manager if one exists. Otherwise you can upload a version from your desktop.

  While associating a new version for a component document that is in use, you will get a message indicating that the document is in use.

Deleting Components

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

Notes

- Log in to Oracle Proposals with the Proposals Administrator responsibility.
- Navigate to the Components page.

Setting Up Proposal Templates

Templates provide a standard structure for proposal generation that users can customize.

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.
- Enable 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.

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

Setting up templates is the **laststep** in the administration process.

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 must decide on the supported language for your templates. 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 must have been created in the same languages as the published template. Templates are published if all the components have content associated with them. For a template to be used in North America, component content is created in English, French, and Spanish so that it is published in these three languages. The **Template Detail** page displays a list of languages in which a template has been published.

Create Proposal Template

Creating templates is a four-step process:

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

Notes

- Log in to Oracle Proposals with the Proposals Administrator responsibility.

- Navigate to the Create Proposals Template page.

Header Region Notes

Apply and Publish in Current Language: Click to publish the template for current session language.

Personalization Region Notes

- **Users can add files to proposals created from this template**: Select check box to enable user to add files to proposals created from the template.

Components Region Notes

- **Create New Component:** Create a new component and associate it with the template. Create the component utilizing the **Quick Create Proposal Component** page or the **Advance Create Proposal Component** page.

- **Associate Existing Components**: Choose existing components from the **Search and Select: Proposal Component** page.

- **Change Order**: Specify component order in the **Change Order: Component** page.

Editing Proposal Templates

You can edit the following template elements at any time:

- Template Name

- Template Description

- Template Category

- Component Order

- External file addition for proposals created from the template

Notes

- **Template code**: a template code cannot be edited.

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.

Notes

- Log in to Oracle Proposals with the Proposals Administrator responsibility.

- Navigate to the Personalization section in the Template Detail page.

- **Users can add files to proposals created from this template:** Select this check box to enable users to add external files. The change is reflected immediately for all proposals using this template.

Adding Components to Proposal Templates

Components can only be added if the template is unpublished in all languages. When a template is unpublished, and components are added, the changes are reflected in all new proposals created using this template. Existing proposals are not affected.

Notes

- **Mandatory:** Users cannot exclude mandatory components from their proposals. Select the **Mandatory** check box for components requiring that status.

- **Default Document:** A component can have multiple files. You can specify a default file that is selected when users pick this template.

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

Changing Component Order in Proposal Templates

When you change the component order in a proposal template, it is applicable only to new proposals. Existing proposals already using this template are not affected.

Changing Default Document and Mandatory Attributes

Changes to default files can only be made if the template is unpublished. If a change must 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.

Notes

- **Mandatory:** Select this check box for components requiring that status. Users cannot exclude mandatory components from their proposals.

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.

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.

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

Navigation

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

Deleting Proposal Templates

You can delete only templates that are not used in proposal generation.

Delete proposal templates in the **Templates** page, by selecting the **Delete** icon for the template you want to delete.

Navigation

Oracle Proposals > Administration > Templates > Templates page

Working with Proposal Templates from Campaign Activities

To perform the procedures listed in this section, you must log into the Campaign Activity Workbench under Oracle Applications' Self-Service mode. Consult the *Oracle Marketing User Guide* for details.

Notes

- Log in to Self-Service mode with the Campaign Workbench Super User responsibility.
- Navigate to the Activities List page from the Campaign Dashboard.

Associating Proposal Templates in Campaign Activities

A lead from a campaign activity, when executed, might become an opportunity. 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 activity.

Notes

- Log in to Self-Service mode with the Campaign Workbench Super User responsibility.

- Click the Campaign Dashboard link.
- Select a campaign and view its Activity details.
- From the Collaboration tab in the Activity Details page, click **Add Proposal Template** to add a proposal template to the campaign activity.

Viewing Proposal Templates associated with Campaign Activities

You can view any existing proposal templates that are associated with a campaign activity.

Notes

- Log in to Self-Service mode with the Campaign Workbench Super User responsibility.
- Click the Campaign Dashboard link.
- Select a campaign and view its Activity details.
- In the Activity Details page, click the Collaboration tab to view the associated proposal template.

Deleting Proposal Templates associated with Campaign Activities

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

Unpublishing Proposal Templates associated with Campaign Activities

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

RTF Files Overview

The RTF files are the proposal files that contain the actual content (text, graphics, or tables) that represent proposal components. You create these files in your preferred editor/word processing application and save them as RTF files. After you create the files, upload and map them 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.

RTF 1.8 Support

Oracle Proposals supports certain features of the RTF 1.8 specification. These features are:

- Unicode (16 bit)
- Table styles
- List pictures
- Document properties

See *Oracle Proposals Implementation Guide* and the Microsoft Word 2003 Rich Text Format (RTF) Specification, version 1.8 for details.

> **Note:** Oracle Proposals supports only RTF files created using Microsoft Word.

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 are 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 are lost in the proposal creation process.
- Input headers and footers carefully. These settings are 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 must 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 be any spaces between the inserted dynamic field token code and the character combination that follows 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 with an RTF extension to be correctly processed in Oracle Proposals.

Dynamic Field Structure in RTF Files

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

Any quote related dynamic field placed outside the control structure are substituted using the first quote in the proposal.

Related Topics

- Appendix A Seed Data, page A-1
- Appendix B Dynamic Field Structure in RTF Files, page B-1

Other Administrative Tasks

Setting Profile Options

When implementing Oracle Proposals, you must set specific profile options. See the *Oracle Proposals Implementation Guide* for details.

Creating Proposals Using Unpublished Templates

Only users with the appropriate profile option settings can create proposals using unpublished templates. See the *Oracle Proposals Implementation Guide* for details on profile option settings.

Concurrent Program for Offline Generation

Whether proposals are generated offline or online is determined by thresholds set in profile options. See the *Oracle Proposals Implementation Guide* for details on profile option settings.

4

Accessing Proposals

This chapter covers the following topics:

- Accessing Proposals from the Proposals Page
- Accessing Proposals from Other Applications

Accessing Proposals from the Proposals Page

You can access proposals from the Proposals page.

> **Note:** If a proposal component has been changed, you are notified of this change when you access a proposal that uses the updated component.

Proposals page

Use the Proposals page to view a list of your proposals or initiate proposal creation from the sales application. Proposals are displayed across languages.

Click **Create** to create a new proposal. Click **Export** to export the list of proposals to a file with a .csv extension which you can download and open in a spreadsheet application.

Click the proposal name to update the proposal. Click the customer name to access customer details.

Proposal Views

The Proposal Views display a list of proposals by view. You can view the proposals for your sales team. Managers can view the proposals of subordinates by searching for those proposals. You can review and update a specific group of proposals. Like the Proposals page, proposals across all languages are listed. If a proposal is in a different language than the session language setting, you can only view the proposal.

If you want to see a summary of a particular proposal, click the radio button in the Select column next to the proposal name. This refreshes the page with the selected proposal's summary details. You can update these summary details, or if you require more detailed information on the proposal, click the proposal name to display the Update Proposal page.

Click **Simple Search** to access the simple search page. From the Simple Search page, you can also click **Advanced Search** to perform an advanced search.

If you want to see a different view, select the view name from the View menu and click **Go**.

Click **Personalize** to access the Personalize Views page to duplicate, create, update, or delete a view, as well as change your default view. Oracle Proposals provides a view called My Proposals.

Accessing Proposals from Other Applications

You can view proposals from the following related associated objects:

- A lead
- An opportunity
- A quote
- A customer

Oracle Proposals validates if you attempt to modify a proposal. If you are on the proposals sales team, you can access the proposal.

5

Creating and Deleting Proposals

This chapter covers the following topics:

- Overview of Creating Proposals
- Creating Proposals
- Deleting Proposals

Overview of Creating Proposals

You create proposals to position a product or service as a possible solution to a customer's business needs. Oracle Proposals enables you to create proposals using templates, which feature existing content, standardized document formats, and access to information stored in the database during the sales cycle.

You can create a proposal:

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

If a proposal is created from a quote, opportunity, customer, or lead, customer and sales team information is carried over from the object to the proposal. If the proposal is created standalone from the Oracle Proposals page or Views page, you must provide this information.

Creating Proposals

Creating Proposals in Oracle Proposals

Use the **Create Proposal** page to create proposals. In Oracle Proposals, this page enables you to create a standalone proposal. You can also access this page from other applications to create a proposal in the context of objects in those applications.

Steps

1. Click **Create Proposal**.

2. Enter a proposal name.

3. Search for and select a customer. You can also select a contact.

   You can search for customers you can access, and can search for customers as organizations. You can search for customers as persons if this capability is provided through personalization.

4. Select a proposal template. You can filter groups of templates by category if your organization has many proposal templates. Click **Show** to examine the proposal components.

5. Click **Apply**.

From the Update Proposal page, you can maintain and generate your proposal.

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* and the *Oracle Quoting Implementation Guide* for details.

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

- Earlier version quotes

- Quotes in *Order Submitted* status

- Expired quotes

- Quotes with incomplete pricing

- Quotes with incomplete tax

- Quotes submitted for batch pricing

- Quotes that have been converted to Shopping Carts in Oracle *i*Store
- Quote 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
- Quotes for other customers

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

Notes

- Log in to Oracle Quoting with the Quoting Sales User responsibility.
- Navigate to the Proposals subtab within the quote.
- **Proposals** subtab - shows a page displaying the Quote header information along with any proposals already created from this quote, if any.

Creating a Proposal from an Opportunity

If you are working on an **Opportunity** from Oracle Telesales or Oracle Sales, you will see a **Proposal** link in the **Opportunity Detail** page which displays all related proposals for an opportunity. You can view/or edit a proposal from the list page.

Prerequisites

Telesales Agent responsibility for Oracle Telesales; Sales User responsibility in Oracle Sales.

Navigation

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

Notes

- **Proposal customer name and primary contact name:** Populated based on the information in the opportunity. You can change the proposal contact on the Create Proposal page.
- **Scenarios for proposal template selection**:
  - If the opportunity is created from a campaign activity, you can select only proposal templates associated with that campaign activity. If there is only one template associated with the campaign activity, it is automatically selected 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 is automatically generated. If any components of the selected template are incomplete, you can modify them.
- If no template is associated with an opportunity, you 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 through the campaign activity, the automatically selected template is used to default the name and description. If there is no associated template, nothing is defaulted.

Creating a Proposal from a Customer

If you are working in Oracle Telesales within the context of a customer you will see a Proposal link from where you can view or edit a proposal from the list page. You can also create a new proposal for the customer. In Oracle Sales, you can create a proposal from the Update Customer page by selecting Create Proposal from the Action menu. You can also view proposals by selecting Proposals Received from the View drop down menu in the Business Activities section.

When you create a proposal, the customer name is populated in the Create Proposal page. You can change the proposal contact on the Create Proposal page.

Notes

- Log in to Oracle TeleSales with the Telesales Agent responsibility or to Oracle Sales with the Sales User responsibility.
- Navigate to the Customer page.

Creating a Proposal from a Lead

If you have logged into Oracle Sales through Self-Service mode you will see a **Create Proposal** button on the Update Lead page. You can create proposals from standalone leads or from leads generated from a sales campaign. If the associated sales campaign has proposal templates associated with it, the proposal created from the lead will be generated based on the associated proposal template.

Create a proposal from a lead by selecting the **Create Proposal** button in the **Proposals** subtab section of the **Update Lead** page. The **Create Proposal** page displays with the **Customer** field auto populated.

Notice the lead name in the Proposal header section.

Notes

- Log in to Self-Service mode with the Sales User responsibility.
- Navigate to the Proposals subtab from the Leads section in the Sales Dashboard.
- **Proposal customer name and primary contact name:** Auto populated based on the information in the lead. You can change the proposal contact on the Create Proposal page.
- **Scenarios for proposal template selection:**
  - If the lead is associated with a campaign activity, you can select only proposal templates associated with that campaign activity. If there is only one template associated with the campaign activity, it is automatically selected for proposal creation. If more than one template is associated with the campaign, the first template is automatically 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 is automatically generated. If any components of the selected template are incomplete, you can modify them.
  - If no campaign activity is associated with a lead, you 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 through the campaign activity, the automatically selected template is used to default the name and description. If there is no associated template, nothing is defaulted.

Deleting Proposals

You can delete proposals provided the following:

- You have access to the proposal.
- Generated versions of the proposal have not been sent to a customer.
- The proposal is not in the process of being generated.

6

Working with Proposals

This chapter covers the following topics:

- Personalizing, Generating, and Maintaining Proposals
- Proposal Content Tab
- Generated Documents Tab
- Correspondence Tab
- Sales Team Tab
- Notes and Tasks Tab

Personalizing, Generating, and Maintaining Proposals

The Update Proposal page enables you to manipulate proposal content, generate the proposal, view the e-mail correspondence associated with the proposal, manage the sales team working on the proposal, and track proposal notes and tasks.

You access the Update Proposal page when you click **Apply** on the Create Proposal page, or click the name of a proposal on the Proposal Views page or Proposals page.

The Update Proposals page shows basic information about the proposal. You can modify this information and then click **Save**. **Show More Details** is available through personalization.

To delete a proposal, click **Delete**. You can delete proposals only if you have full access to the proposal.

The page also features these tabs:

- Proposal Content, page 6-2
- Generated Documents, page 6-5
- Correspondence, page 6-7

- Sales Team, page 6-7
- Notes and Tasks, page 6-8

Proposal Content Tab

This tab enables you to further personalize your proposal by adding, removing, or reordering proposal components, attaching supporting documents, and generating the proposal. It contains two tables:

- **Components:** This table lists the components of your proposal. These might be the components that are included in the proposal template you selected, or components that you add as content.
- **Supporting Documents:** This table lists the supporting documents attached to your proposal. These documents are optional, and in any valid file format.

Personalizing Components

Components that require personalization are indicated with a red X in the Complete column. This means you must provide information to complete that component. You cannot generate your proposal until all components are complete.

Click the proposal component name to display the details for that component. This page enables you to complete the personalization of a particular component by selecting an alternate template for that component (if there are several choices available), personalizing text for use in dynamic fields upon proposal generation, or adding an image, such as a logo. Enter your changes and click **Apply**.

Click **Add File** to add an image. This enables you to add an image file from your desktop, or from the Oracle Content Manager library or folder. Click **View Image** to preview the image. The ability to add an image file is made available through personalization by your system administrator. You can add images in these formats:

- JPG
- JPE
- JPEG
- JFIF
- PNG

Click the Preview icon to preview the individual proposal components. You cannot see the complete proposal until you generate it.

Adding Components

You can add external documents to use as proposal components. These documents might be files from your desktop, excluded components, or suggested content.

Click **Add Content** to add content to your proposal.

The suggested content choices presented are based on the components associated with your proposal, or the associated quote, opportunity, or lead. For example, if your proposal contains a component pertaining to a server, suggested content might be a data sheet for that server.

This functionality is available through personalization by your system administrator.

Excluding Components

To remove content from a proposal, select the content by clicking the Select check box and then click **Exclude**. This does not delete the content, but simply removes it from the proposal that you give to the customer. Excluded components are not listed in the table.

You can add excluded components back into the proposal by clicking **Add Content** and adding the component. You cannot exclude mandatory components.

If you are excluding documents from a generated proposal, you must regenerate the proposal to see the new version with the component excluded.

Changing the Order of Components

You can change the order of the included components. By rearranging the components, you can choose the component structure of your proposal. Click **Change Order** to change the order of proposal components.

This is especially useful after you add a component, as newly added components are displayed at the end of the proposal.

You must generate the proposal to update it with the changed order.

Working with Quotes as Components

The Proposal Components tab lists quotes associated with the proposal, if there are any quotes. You can add a quote, remove a quote, or change the order of the listed quotes. If the generated proposal needs information from only a single quote, the first quote listed is the one used for the proposal. If you want a different quote to be used, change the order of the listed quotes.

It is possible that an eligible quote might become ineligible after it has been added. If this happens, you 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.

The following types of quotes cannot be added to proposals:

- Earlier 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 *i*Store Shopping carts
- Quote templates

Adding Supporting Documents

The Supporting Documents table lists the additional documents attached to your proposal. These documents are optional, and can be in any valid file format.

Click **Add Document** to add a supporting document to your proposal. This enables you to add a file from your desktop, from the Oracle Content Manager library or folder, or suggested content based on the proposal components.

To delete a supporting document from a proposal, select the document by clicking the Select check box and then click **Delete**.

Click the Preview icon to preview the supporting document.

Generating Proposals

When you have completed your proposal personalization by manipulating the content and adding supporting documents, click **Generate Proposal Document** to generate your proposal. Proposal generation combines the various proposal components, any added quotes, and the content of dynamic fields into one RTF format document.

During generation, the parts of the proposal are validated and checked for completeness, and a message displays if there are any corrections to be made. After it is generated, your proposal is stored in the Generated Documents tab.

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 settings for specifying the maximum size of a document generated online. You cannot work on a proposal while it is generating offline. If you choose to generate it online, the process begins immediately and the confirmation page is displayed when the generation is complete. From this page, you can:

- Preview the RTF version of the proposal
- Convert the RTF document into a PDF file
- E-mail the proposal to a customer or someone outside the customer's contact list
- Upload a proposal from your desktop. Uploaded proposals are stored in the generated proposals table on the Generated Documents tab.

Generated Documents Tab

This tab enables you to manage the generated versions of your proposal. The Generated Documents table lists the various versions of your generated proposal.

Working with a Generated Proposal

Each time you generate a proposal, a new version of it is created and listed in the table. You can generate a proposal repeatedly if its components are complete. After a proposal is generated, you can view it, download it, or send it to a customer.

You cannot change or delete a proposal that is being generated online. You must wait until the generation process completes to effect any change.

Click **Show** to display the supporting documents associated with a proposal version.

Select a proposal version and click **Generate PDF File** to create a PDF version of the RTF proposal document.

You can change the status of a proposal version from Draft to Final as work on the proposal progresses.

Click **Upload New Version** to upload a proposal from your desktop.

> **Note:** Problems might 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 *InternalUse* 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 *InternalUse*

but with a different specification of Font face Arial and Size 10, when the proposal is generated it converts the style *Internal Use* for the first component using the specifications of Font face Arial and Size 10, and override the definition in the first component.

Also, if an "out of memory" error message displays when generating proposal versions either online or offline or when previewing proposal versions, this might be due to a large number of styles used in a document. Try reducing the number of styles in the component documents.

Sending a Proposal

You can send the completed proposal to the customer using e-mail. You can send either RTF or PDF format documents, and supporting documents attached to the proposal.

To send a proposal by e-mail to a customer contact, select the proposal by clicking the Select check box and then clicking **Email Proposal**. The e-mail page enables you to navigate to the Manage Attachments page (to select documents to send to the customer with the proposal), edit the recipients and the copy recipients of the e-mail. Enter subject and body text and click **Send**.

Depending on the value you have set for the profile option, PRP: Email Proposals to External Parties, you have the option of sending the proposal to someone outside the customer's contact list. The default value of this profile option is No. Please see 'Oracle Proposals Profile Options' in *Oracle Proposals Implementation Guide* for details.

> **Note:** The *Edit To Recipients* and *Edit Cc Recipients* are available only if the customer in the proposal is an Organization. If the customer is a Person, both these buttons are disabled because you can edit To and Cc recipients only for business contacts.

After you send the proposal e-mail, a record of it displays on the Correspondence tab.

> **Note:** If you e-mail the proposal to someone outside the customer's contact list, then the application will not save a record of it in customer interactions. The application will, however, capture this activity in the e-mail history section, for the given proposal, within the Correspondence tab.

Viewing Generated Proposal Details

Click the Details icon to view the Generated Version Details page. On this page, you can view the details of a proposal, add or delete supporting documents, or add remarks about a proposal.

You can also send the proposal by e-mail to a customer or generate a PDF file of the proposal from this page.

Deleting a Generated Proposal

You can delete a proposal if it has not been sent to a customer or is being generated offline. To delete a generated proposal version, select the proposal by clicking the Select check box and then clicking the Delete icon.

Correspondence Tab

This tab enables you to access a log of your e-mail communications with customers regarding all versions of a proposal. In the Email History table, click the e-mail subject to display details about the e-mail and a list of attachments. Click the version number to see details on the version of the proposal that was sent in the e-mail.

> **Note:** If you e-mail the proposal to someone outside the customer's contact list, then the application will not save a record of it in customer interactions. The application will, however, capture this activity in the e-mail history section, for the given proposal, within the Correspondence tab.

Sales Team Tab

If you are working on a large or complex opportunity, you might require several team members to work on a proposal for that opportunity. The Sales team tab enables you to manage this team effort, containing a table listing the sales representatives and sales managers who are collaborating on a proposal.

If a proposal is created from an outside application like Oracle Sales, a proposal team can be derived from a quote, opportunity, or a lead. If a proposal is created from a quote, opportunity, or lead, then the sales team is copied from the territory assignments in the originating application.

Click **Add Person** to search for a team member to add to the proposal sales team. You can optionally select a sales group for the new team member.

The Full Access check box indicates the proposal access level for a team member. Full access indicates that a team member can update the sales team, and update, delete, preview, or e-mail the proposal. If this box is not selected, the team member has read only access to the proposal and can view the sales team. Team members with full access can add or remove other team members. Managers can access proposals belonging to their subordinates. The manager inherits the highest access level of the subordinates.

The Owner check box indicates the proposal owner, which by default is the proposal creator. A proposal must have an owner, and owners cannot be removed from the proposal sales team. Only a team member with full access can be the owner, and there is always only one owner for a proposal. Also, owners must have the Do Not Reassign check box selected. Proposal owners can be changed by any team member with full access. An owner who is changed to be simply a team member automatically retains full access.

The Do Not Reassign check box indicates whether a team member can be reassigned using the Territory Assignment Program (TAP). If the proposal is created from a lead, opportunity or campaign, the team members assignment status is copied over into the Sales Team tab.

Notes and Tasks Tab

This tab enables you to add notes and tasks pertaining to your proposal. The notes region enables you to add notes and view notes added by yourself and other team members.

The tasks region enables you to view and add tasks associated with the proposal. Click **Add Another Row** to add a new task. If you have full access to the proposal, you can update tasks associated with it.

A

Seed Data

This appendix covers the following topics:

- Seeded Data
- Seeded Dynamic Fields

Seeded Data

The seeded data in Oracle Proposals allows users to leverage default 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.

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.

Proposal Dynamic Fields - General

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

Proposal Dynamic Fields - General

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

Proposal Dynamic Fields - Sales Representative

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

Proposal Dynamic Fields - Sales Representative

Dynamic field Name	Table	Comment
Sales Rep Name	JTF_RS_RESOURCE_EXTNS	**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@>

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

Dynamic field Name	Table	Comment
Sales Rep State	JTF_RS_RESOURCE_EXTNS	**Field Code**: PRP019 **RTF Display**:<@PRP019:Sales Rep State@>
Sales Rep ZIP	JTF_RS_RESOURCE_EXTNS	**Field Code**: PRP020 **RTF Display**:<@PRP020:Sales Rep ZIP@>
Sales Rep County	JTF_RS_RESOURCE_EXTNS	**Field Code**: PRP021 **RTF Display**:<@PRP021:Sales Rep County@>
Sales Rep Province	JTF_RS_RESOURCE_EXTNS	**Field Code**: PRP022 **RTF Display**:<@PRP022:Sales Rep Province@>
Sales Rep Country	JTF_RS_RESOURCE_EXTNS	**Field Code**: PRP023 **RTF Display**:<@PRP023:Sales Rep Country@>
Sales Rep Job Title	JTF_RS_RESOURCE_EXTNS	**Based on whether the user is an employee or resource, name should came from the appropriate table.** **Field Code**: PRP024 **RTF Display**:<@PRP024:Sales Rep Job Title@>

Proposal Dynamic Fields - Customer

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

Proposal Dynamic Fields - Customer

Dynamic field Name	Table	Table Column	Comment
Customer Name	HZ_PARTIES	PARTY_NAME (for organization) PERSON_FIRST_NAME PERSON_MIDDLE_NAME PERSON_LAST_NAME (for people)	**FieldCode**: PRP006 **RTFDisplay**: <@PRP006:Customer Name@>
Contact Name	HZ_PARTIES	PERSON_FIRST_NAME PERSON_MIDDLE_NAME PERSON_LAST_NAME	**FieldCode**: PRP007 **RTFDisplay**: <@PRP007:Contact Name@>
Contact Title	HZ_PARTIES	PERSON_TITLE	**FieldCode**: PRP008 **RTFDisplay**: <@PRP008:Contact Title@>
Contact Phone Number	HZ_CONTACT_POINTS	PHONE_COUNTRY_CODE, PHONE_AREA_CODE, PHONE_NUMBER, PHONE_EXTENSION	**Field Code**: PRP009 **RTFDisplay**: <@PRP009: Contact Phone Number@>
Customer Email Address	HZ_PARTIES	EMAIL_ADDRESS	**Field Code**: PRP010 **RTF Display**: <@PRP010:Customer Email@>

Quote Dynamic Fields - Header: General

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

Quote Dynamic Fields - Header: General

Dynamic field Name	Table	Table Column	Comment
Quote Name	ASO_QUOTE_HEADERS_ALL	QUOTE_NAME	**FieldCode**: PRPQOT001 **RTFDisplay** :<@PRPQOT001:Quote Name Code@>
Quote Number	ASO_QUOTE_HEADERS_ALL	QUOTE_NUMBER	**FieldCode**: PRPQOT002 **RTFDisplay** :<@PRPQOT002:Quote Number@>
Quote Version	ASO_QUOTE_HEADERS_ALL	QUOTE_VERSION	**FieldCode** :PRPQOT003 **RTFDisplay** :<@PRPQOT003:Quote Version@>
Expiration Date	ASO_QUOTE_HEADERS_ALL	QUOTE_EXPIRATION_DATE	**FieldCode** :PRPQOT004 **RTFDisplay**: <@PRPQOT004:Expiration Date@>
Campaign Name	AMS_CAMPAIGNS_ALL_TL	CAMPAIGN_NAME	**FieldCode** :PRPQOT005 **RTFDisplay**: <@PRPQOT005:Campaign Name @>

Dynamic field Name	Table	Table Column	Comment
Quote Promotion Code	ASO_PRICE_ATTRIBUTES	PRICING_ATTRIBUTE1	There can be multiple codes applied to a quote. Requires a repeater block. **FieldCode**: PRPQOT006 **RTFDisplay** :<@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. **FieldCode**: PRPQOT007 **RTFDisplay** :<@PRPQOT007:Quote Promotion Name@>
Status	ASO_QUOTE_STATUSES_TL	MEANING	**FieldCode**: PRPQOT054 **RTFDisplay**: <@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@>

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@>

Quote Dynamic Fields - Header: Customer

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

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)	**FieldCode** :PRPQOT008 **RTFDisplay**: <@PRPQOT008:Sold to Cust Name@>
Sold to Cust Acct Number	HZ_CUST_ACCOUNTS	ACCOUNT_NUMBER	**FieldCode**: PRPQOT009 **RTFDisplay**: <@PRPQOT009:Sold to Cust Acct Number@>

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. **FieldCode** :PRPQOT010 **RTFDisplay**: <@PRPQOT010:Sold to Contact Name@>
Sold to Contact Title	HZ_PARTIES	PERSON_TITLE	**FieldCode** :PRPQ0T011 **RTFDisplay**: <@PRPQOT011:Sold to Contact Title@>
Sold to Cust Addressee	HZ_PARTY_SITES	ADDRESSEE	**FieldCode** :PRPQOT012 **RTFDisplay**: <@PRPQOT012:Sold to Cust Addressee@>
Sold to Cust Address Line 1	HZ_LOCATIONS	ADDRESS 1	**FieldCode** :PRPQOT013 **RTFDisplay**: <@PRPQOT013:Sold to Cust Address Line 1@>
Sold to Cust Address Line 2	HZ_LOCATIONS	ADDRESS 2	**FieldCode** :PRPQOT014 **RTFDisplay**: <@PRPQOT014:Sold to Cust Address Line 2@>

Dynamic field Name	Table	Table Column	Comment
Sold to Cust City	HZ_LOCATIONS	CITY	**FieldCode** :PRPQOT015 **RTFDisplay**: <@PRPQOT015:Sold to Cust City@>
Sold to Cust State	HZ_LOCATIONS	STATE	**FieldCode** :PRPQOT016 **RTFDisplay**: <@PRPQOT016:Sold to Cust State@>
Sold to Cust ZIP	HZ_LOCATIONS	POSTAL_CODE	**FieldCode** :PRPQOT017 **RTFDisplay**: <@PRPQOT017:Sold to Cust ZIP@>
Sold to Cust County	HZ_LOCATIONS	COUNTY	**FieldCode** :PRPQOT018 **RTFDisplay**: <@PRPQOT018:Sold to Cust County@>
Sold to Cust Province	HZ_LOCATIONS	PROVINCE	**FieldCode** :PRPQOT019 **RTFDisplay**: <@PRPQOT019:Sold to Cust Province@>
Sold to Cust Country	HZ_LOCATIONS	COUNTRY	**FieldCode** :PRPQOT020 **RTFDisplay**: <@PRPQOT020:Sold to Cust Country@>

Dynamic field Name	Table	Table Column	Comment
Sold to Contact Phone	HZ_CONTACT_POINTS	PHONE_COUNTRY_CODE PHONE_AREA_CODE PHONE_NUMBER PHONE_EXTENSION	**FieldCode** :PRPQOT021 **RTFDisplay**: <@PRPQOT021:Sold to Contact Phone@>
Sold to Cust Email	HZ_PARTIES	EMAIL_ADDRESS	**FieldCode** :PRPQOT022 **RTFDisplay**: <@PRPQOT022:Sold to Cust Email@>
Bill to Customer Name	HZ_PARTIES	PARTY_NAME (for organization) PERSON_FIRST_NAME PERSON_MIDDLE_NAME | PERSON_LAST_NAME (for people)	**FieldCode** :PRPQOT093 **RTFDisplay**: <@PRPQOT093:Bill To Customer Name@>
Bill to Customer Account Number	HZ_CUST_ACCOUNTS	ACCOUNT_NUMBER	**FieldCode** :PRPQOT094 **RTFDisplay**: <@PRPQOT094:Bill To Customer Account@>
Bill to Customer Addressee	HZ_PARTY_SITES	ADDRESSEE	**FieldCode** :PRPQOT095 **RTFDisplay**: <@PRPQOT095:Bill To Customer Addressee@>

Dynamic field Name	Table	Table Column	Comment
Bill to Customer Address Line 1	HZ_LOCATIONS	ADDRESS 1	**FieldCode** :PRPQOT096 **RTFDisplay**: <@PRPQOT096:Bill To Customer Address Line 1@>
Bill to Customer Address Line 2	HZ_LOCATIONS	ADDRESS 2	**FieldCode** :PRPQOT097 **RTFDisplay**: <@PRPQOT097:Bill To Customer Address Line 2@>
Bill to Customer City	HZ_LOCATIONS	CITY	**FieldCode** :PRPQOT098 **RTFDisplay**: <@PRPQOT098:Bill To Customer City@>
Bill to Customer State	HZ_LOCATIONS	STATE	**FieldCode** :PRPQOT099 **RTFDisplay**: <@PRPQOT099:Bill To Customer State@>
Bill to Customer ZIP	HZ_LOCATIONS	POSTAL_CODE	**FieldCode** :PRPQOT100 **RTFDisplay**: <@PRPQOT100:Bill To Customer ZIP@>
Bill to Customer County	HZ_LOCATIONS	COUNTY	**FieldCode** :PRPQOT101 **RTFDisplay**: <@PRPQOT101:Bill To Customer County@>

Dynamic field Name	Table	Table Column	Comment
Bill to Customer Province	HZ_LOCATIONS	PROVINCE	**FieldCode** :PRPQOT102 **RTFDisplay**: <@PRPQOT102:Bill To Customer Province@>
Bill to Customer Country	HZ_LOCATIONS	COUNTRY	**FieldCode** :PRPQOT103 **RTFDisplay**: <@PRPQOT103:Bill To Customer County@>
Ship to Customer Name	HZ_PARTIES	PARTY_NAME (for organization) PERSON_FIRST_NAME | PERSON_MIDDLE_NAME PERSON_LAST_NAME (for people)	**FieldCode** :PRPQOT104 **RTFDisplay**: <@PRPQOT104:Ship To Customer Name@>
Ship to Customer Account Number	HZ_CUST_ACCOUNTS	ACCOUNT_NUMBER	**FieldCode** :PRPQOT105 **RTFDisplay**: <@PRPQOT105:Ship To Customer Account Number@>
Ship to Customer Addressee	HZ_PARTY_SITES	ADDRESSEE	**FieldCode** :PRPQOT106 **RTFDisplay**: <@PRPQOT106:Ship To Customer Addressee@>

Dynamic field Name	Table	Table Column	Comment
Ship to Customer Address Line 1	HZ_LOCATIONS	ADDRESS 1	**FieldCode** :PRPQOT107 **RTFDisplay**: <@PRPQOT107:Ship To Customer Address Line 1@>
Ship to Customer Address Line 2	HZ_LOCATIONS	ADDRESS 2	**FieldCode** :PRPQOT108 **RTFDisplay**: <@PRPQOT108:Ship To Customer Address Line 2@>
Ship to Customer City	HZ_LOCATIONS	CITY	**FieldCode** :PRPQOT109 **RTFDisplay**: <@PRPQOT109:Ship To Customer City@>
Ship to Customer State	HZ_LOCATIONS	STATE	**FieldCode** :PRPQOT110 **RTFDisplay**: <@PRPQOT110:Ship To Customer State@>
Ship to Customer ZIP	HZ_LOCATIONS	POSTAL_CODE	**FieldCode** :PRPQOT111 **RTFDisplay**: <@PRPQOT111:Ship To Customer ZIP@>
Ship to Customer County	HZ_LOCATIONS	COUNTY	**FieldCode** :PRPQOT112 **RTFDisplay**: <@PRPQOT112:Ship To Customer County@>

Dynamic field Name	Table	Table Column	Comment
Ship to Customer Province	HZ_LOCATIONS	PROVINCE	**FieldCode** :PRPQOT113 **RTFDisplay**: <@PRPQOT113:Ship To Customer Province@>
Ship to Customer Country	HZ_LOCATIONS	COUNTRY	**FieldCode** :PRPQOT114 **RTFDisplay**: <@PRPQOT114:Ship To Customer Country@>

Quote Dynamic Fields - Header: Pricing

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

Quote Header: Pricing

Dynamic field Name	Table	Table Column	Comment
Price List Name	QP_LIST_HEADERS_TL	NAME	**FieldCode**: PRPQOT056 **RTFDisplay**: <@PRPQOT056:Price List Name@> Priority 2
Currency Code	ASO_QUOTE_HEADERS	CURRENCY_CODE	**FieldCode**: PRPQOT023 **RTFDisplay**: <@PRPQOT023:Currency Code@>

Dynamic field Name	Table	Table Column	Comment
Total List Price	ASO_QUOTE_HEADERS	TOTAL_LIST_PRICE	**FieldCode** :PRPQOT024 **RTFDisplay**: <@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.** **FieldCode** :PRPQOT025 **RTFDisplay**: <@PRPQOT025:Total Adjustment Amount@>
Total Adjustment Percent	ASO_QUOTE_HEADERS	TOTAL_ADJUSTMENT_PERCENT	**All adjustment types except FREIGHTS AND CHARGES.** **FieldCode** :PRPQOT026 **RTFDisplay**: <@PRPQOT026:Total Adjustment Percent@>
Total Selling Price	Calculated	TOTAL_LIST_PRICE – TOTAL_ADJUSTED_ADMOUNT	Reflects a total of list price – adjustments **FieldCode** :PRPQOT027 **RTFDisplay**: <@PRPQOT027:Total Selling Price@>

Dynamic field Name	Table	Table Column	Comment
Total Tax Amount	ASO_QUOTE_HEADERS	TOTAL_TAX	**FieldCode** :PRPQOT028 **RTFDisplay**: <@PRPQOT028:Total Tax Amount@>
Total Charges	ASO_QUOTE_HEADERS	TOTAL_SHIPPING_CHARGE	**FieldCode** :PRPQOT029 **RTFDisplay**: <@PRPQOT029:Total Charges@>
Total Quote Price	ASO_QUOTE_HEADERS	TOTAL_QUOTE_PRICE	**Total adjusted amount plus total tax and total shipping charge.** **FieldCode** :PRPQOT030 **RTFDisplay**: <@PRPQOT030:Total Quote Price@>
Price List Name	QP_LIST_HEADERS_TL	NAME	**FieldCode** :PRPQOT056 **RTFDisplay**: <@PRPQOT056:Price List Name@>
Agreement Name	OE_AGREEMENTS_TL	NAME	**FieldCode** :PRPQOT057 **RTFDisplay**: <@PRPQOT057:Agreement Name@>

Dynamic field Name	Table	Table Column	Comment
Header Charge Information	ASO_PRICE_ADJUSTMENTS_V	MODIFIER_DESCRIPTION CHARGE_TYPE_CODE | CHARGE_SUBTYPE_CODE	**FieldCode** :PRPQOT170 **RTFDisplay**: <@PRPQOT170:Header Charge Information@>
Header Charge Amount	ASO_PRICE_ADJUSTMENTS_V	ADUSTED_AMOUNT	**FieldCode** :PRPQOT171 **RTFDisplay**: <@PRPQOT171:Header Charge Amount@>

Quote Dynamic Fields - Header: Contract

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

Quote Header - Contract

Dynamic field Name	Table	Table Column	Comment
Contract Number	OKC_K_HEADERS_B	CONTRACT_NUMBER OBJECT_VERSION_NUMBER	**FieldCode** :PRPQOT059 **RTFDisplay**: <@PRPQOT059:Contract Number@>
Contract Section	OKC_K_HEADERS_B	CONTRACT_SECTION	**FieldCode** :PRPQOT031 **RTFDisplay**: <@PRPQOT031:Contract Section@>

Dynamic field Name	Table	Table Column	Comment
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	**FieldCode**: PRPQOT033 **RTFDisplay**: <@PRPQOT033:Contract Standard Text@>
Contract Non Standard Text	OKC_K_HEADERS_B	CONTRACT_NON_STANDARD_TEXT	**FieldCode**: PRPQOT034 **RTFDisplay**: <@PRPQOT034:Contract Non Standard Text@>

Quote Dynamic Fields - Header: Payment

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

Quote Header - Payment

Dynamic field Name	Table	Table Column	Comment
Payment Terms	ASO_PAYMENTS	PAYMENT_TERM_ID	**FieldCode** :PRPQOT035 **RTFDisplay**: <@PRPQOT035:Payment Terms@>
Payment Type	ASO_PAYMENTS	PAYMENT_TYPE_CODE	**FieldCode** :PRPQOT036 **RTFDisplay**: <@PRPQOT036:Payment Type@>

Dynamic field Name	Table	Table Column	Comment
PO Number	ASO_PAYMENTS	CUST_PO_NUMBER	**FieldCode** :PRPQOT037 **RTFDisplay**: <@PRPQOT037:PO Number@>
Check Number	ASO_PAYMENTS	PAYMENT_REF_NUMBER	**FieldCode** :PRPQOT038 **RTFDisplay**: <@PRPQOT038:Check Number@>
Credit Card Type	ASO_PAYMENTS	CREDIT_CARD_CODE	**FieldCode** :PRPQOT039 **RTFDisplay**: <@PRPQOT039:Credit Card Type@>
Credit Card Number	ASO_PAYMENTS	CREDIT_CARD_NUMBER	**FieldCode** :PRPQOT040 **RTFDisplay**: <@PRPQOT040:Credit Card Number@>
Credit Card Holder Name	ASO_PAYMENTS	CREDIT_CARD_HOLDER_NAME	**FieldCode** :PRPQOT041 **RTFDisplay**: <@PRPQOT041:Credit Card Holder Name@>
Credit Card Expiration	ASO_PAYMENTS	CREDIT_CARD_EXPIRATION_DATE	**FieldCode** :PRPQOT042 **RTFDisplay**: <@PRPQOT042:Credit Card Expiration@>

Quote Dynamic Fields - Header: Attachment

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

Quote Header - Attachment

Dynamic field Name	Table	Table Column	Comment
Header Attachment Description	FND_DOCUMENTS_VL	DESCRIPTION	**FieldCode** :PRPQOT160 **RTFDisplay**: <@PRPQOT160:Header Attachment Description@>
Header Attachment Text	FND_LOBS	FILE_DATA	**FieldCode** :PRPQOT161 **RTFDisplay**: <@PRPQOT161:Header Attachment Text@>

Quote Dynamic Fields – Header: Shipment

This tables lists the **Quote Dynamic Fields - Header: Shipment** seeded dynamic fields.

Quote Header: Shipment

Dynamic Field Name	Table	Table Column	Comment
Freight Terms	ASO_PVT_SHIPMENTS_V	FREIGHT_TERMS_CODE	**Field Code:** PRPQOT115 **RTFDisplay:** <@PRPQOT115:Freight Terms@>

Quote Dynamic Fields - Lines: General

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

Quote Lines: General

Dynamic field Name	Table	Table Column	Comment
Item Number	MTL_SYSTEM_ITEMS	ITEM_NUMBER	**FieldCode**: PRPQOT043 **RTFDisplay**: <@PRPQOT043:Item Number@>
Product Description	MTL_SYSTEM_ITEMS	PRODUCT_DESC	**FieldCode**: PRPQOT044 **RTFDisplay**: <@PRPQOT044: Product Description@>
Unit of Measure	ASO_QUOTE_LINES_ALL	UOM_CODE	**FieldCode**: PRPQOT045 **RTFDisplay**: <@PRPQOT045:Unit of Measure@>
Line Quantity	ASO_QUOTE_LINES_ALL	QUANTITY	**FieldCode**: PRPQOT046 **RTFDisplay**: <@PRPQOT046:Line Quantity@>
Line Type	ASO_QUOTE_LINES_ALL	ORDER_LINE_TYPE_ID	**FieldCode**: PRPQOT047 **RTFDisplay**: <@PRPQOT047:Line Type@>
Line Number	ASO_PVT_QUOTE_LINES_BALI_V	UI_LINE_NUMBER	**FieldCode**: PRPQOT330 **RTFDisplay**: <@PRPQOT330:Line Number@>

Dynamic field Name	Table	Table Column	Comment
Line Service Start Date	ASO_QUOTE_LINES_ALL	START_DATE_ACTIVE	**FieldCode**: PRPQOT331 **RTFDisplay**: <@PRPQOT331:Line Service Start Date@>
Line Service End Date	ASO_QUOTE_LINES_ALL	END_DATE_ACTIVE	**FieldCode**: PRPQOT332 **RTFDisplay**: <@PRPQOT332:Line Service End Date@>
Line Service Number	ASO_QUOTE_LINE_DETAILS	SERVICE_NUMBER	**FieldCode**: PRPQOT333 **RTFDisplay**: <@PRPQOT333:Line Service Number@>
Line Service Period	ASO_QUOTE_LINE_DETAILS	SERVICE_PERIOD	**FieldCode**: PRPQOT334 **RTFDisplay**: <@PRPQOT334:Line Service Period@>
Line Service Duration	ASO_QUOTE_LINE_DETAILS	SERVICE_DURATION	**FieldCode**: PRPQOT335 **RTFDisplay**: <@PRPQOT335:Line Service Duration@>
Item Long Description	MTL_SYSTEM_ITEMS	LONG_DESCRIPTION	**FieldCode**: PRPQOT336 **RTFDisplay**: <@PRPQOT336:Item Long Description@>

Quote Dynamic Fields - Lines: Pricing

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

Quote Lines: Pricing

Dynamic field Name	Table	Table Column	Comment
Line Unit List Price	ASO_QUOTE_LINES_ALL	LINE_LIST_PRICE	**FieldCode**: PRPQOT048 **RTFDisplay**: <@PRPQOT048:Line Unit List Price@>
Line Unit Adjustment Amount	ASO_QUOTE_LINES_ALL	LINE_ADJUSTMENT_AMOUNT	**FieldCode**: PRPQOT049 **RTFDisplay**: <@PRPQOT049:Line Unit Adjustment Amount@>
Line Unit Adjustment Percent	ASO_QUOTE_LINES_ALL	LINE_ADJUSTMENT_PERCENT	**FieldCode**: PRPQOT050 **RTFDisplay**: <@PRPQOT050:Line Unit Adjustment Percent@>
Line Total Selling Price	Calculated	LINE_QUOTE_PRICE*QTY	**FieldCode**: PRPQOT052 **RTFDisplay**: <@PRPQOT052:Line Total Selling Price@>
Line Unit Selling Price	ASO_QUOTE_LINES_ALL	LINE_QUOTE_PRICE	**FieldCode**: PRPQOT051 **RTFDisplay**: <@PRPQOT051:Line Unit Selling Price@>

<table>
<tr><th>Dynamic field Name</th><th>Table</th><th>Table Column</th><th>Comment</th></tr>
<tr><td>Line Charge Information</td><td>ASO_PRICE_ADJUSTMENTS_V</td><td>MODIFIER_DESCRIPTION
|
CHARGE_TYPE_CODE
|
CHARGE_SUBTYPE_CODE</td><td>FieldCode: PRPQOT310
RTFDisplay: <@PRPQOT310:Line Charge Information@></td></tr>
<tr><td>Line Charge Amount</td><td>ASO_PRICE_ADJUSTMENTS_V</td><td>ADJUSTED_AMOUNT</td><td>FieldCode: PRPQOT311
RTFDisplay: <@PRPQOT311:Line Charge Amount@></td></tr>
<tr><td>Line Tax Code</td><td>ASO_TAX_DETAILS</td><td>TAX_CODE</td><td>FieldCode: PRPQOT320
RTFDisplay: <@PRPQOT320:Line Tax Code@></td></tr>
<tr><td>Line Tax Rate</td><td>ASO_TAX_DETAILS</td><td>TAX_CODE</td><td>FieldCode: PRPQOT321
RTFDisplay: <@PRPQOT321:Line Tax Rate@></td></tr>
<tr><td>Line Tax Amount</td><td>ASO_TAX_DETAILS</td><td>TAX_AMOUNT</td><td>FieldCode: PRPQOT322
RTFDisplay: <@PRPQOT322:Line Tax Amount@></td></tr>
</table>

Structure Dynamic Fields

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

This table lists the **Structure** dynamic fields:

Structure Dynamic Fields

Group	Entry Values	Field Name	Description
Quote Structure - Header	**FieldCode**:PRPSTR **001** **RTFDisplay**: <@PRPSTR**001**:Begin Quote@>	Begin Quote	Control structure to indicate quote beginning
Quote Structure - Header	**FieldCode**:PRPSTR **002** **RTFDisplay**: <@PRPSTR**002**:End Quote@>	End Quote	Control structure to indicate quote end
Quote Structure - Header	**FieldCode**:PRPSTR **015** **RTFDisplay**: <@PRPSTR**015**:Begin Quote Category Sub Total@>	Begin Quote Category Sub Total	Control structure to indicate quote category subtotal beginning.
Quote Structure - Header	**FieldCode**:PRPSTR **016** **RTFDisplay**: <@PRPSTR**016**:End Quote Category Sub Total@>	End Quote Category Sub Total	Control structure to indicate quote category subtotal ending.
Quote Structure - Header	**FieldCode**:PRPSTR **017** **RTFDisplay**: <@PRPSTR**017**:Begin Quote Header Attachment Text@>	Begin Quote Header Attachment Text	Control structure to indicate quote header attachment text beginning.

Group	Entry Values	Field Name	Description
Quote Structure - Header	**FieldCode**:PRPSTR **018** **RTFDisplay**: <@PRPSTR**018**:End Quote Header Attachment Text@>	End Quote Header Attachment Text	Control structure to indicate quote header attachment text end.
Quote Structure - Header	**FieldCode**:PRPSTR **019** **RTFDisplay**: <@PRPSTR**019**:Begin Quote Header Charges@>	Begin Quote Header Charges	Control structure to indicate quote header charges beginning.
Quote Structure - Header	**FieldCode**:PRPSTR **020** **RTFDisplay**: <@PRPSTR**020**:End Quote Header Charges@>	End Quote Header Charges	Control structure to indicate quote header charges end.
Quote Structure - Header	**FieldCode**:PRPSTR **021** **RTFDisplay**: <@PRPSTR**021**:Begin Quote Header Tax@>.	Begin Quote Header Tax	Control structure to indicate quote header tax beginning.
Quote Structure - Header	**FieldCode**:PRPSTR **022** **RTFDisplay**: <@PRPSTR**022**:End Quote Header Tax@>	End Quote Header Tax	Control structure to indicate quote header tax end.
Quote Structure – Line	**FieldCode**:PRPSTR **003** **RTFDisplay**: <@PRPSTR**001**:Begin Quote Line@>	Begin Quote Line	Control structure to indicate quote line beginning.

Group	Entry Values	Field Name	Description
Quote Structure – Line	**FieldCode**:PRPSTR **004** **RTFDisplay**: <@PRPSTR**004**:End Quote Line@>	End Quote Line	Control structure to indicate quote line end.
Quote Structure – Line	**FieldCode**:PRPSTR **031** **RTFDisplay**: <@PRPSTR**031**:Begin Quote Line Attachment Text@>	Begin Quote Line Attachment Text	Control structure to indicate quote line attachment text beginning.
Quote Structure – Line	**FieldCode**:PRPSTR **032** **RTFDisplay**: <@PRPSTR**032**:End Quote Line Attachment Text@>	End Quote Line Attachment Text	Control structure to indicate quote line attachment text end.
Quote Structure – Line	**FieldCode**:PRPSTR **033** **RTFDisplay**: <@PRPSTR**033**:Begin Quote Line Charges@>	Begin Quote Line Charges	Control structure to indicate quote line charges beginning.
Quote Structure – Line	**FieldCode**:PRPSTR **034** **RTFDisplay**: <@PRPSTR**034**:End Quote Line Charges@>	End Quote Line Charges	Control structure to indicate quote line charges end.
Quote Structure – Line	**FieldCode**:PRPSTR **035** **RTFDisplay**: <@PRPSTR**035**:Begin Quote Line Tax@>	Begin Quote Line Tax	Control structure to indicate quote line tax beginning.

Group	Entry Values	Field Name	Description
Quote Structure – Line	**FieldCode**:PRPSTR **036** **RTFDisplay**: <@PRPSTR**036**:End Quote Line Tax@>	End Quote Line Tax	Control structure to indicate quote line tax end.
Quote Structure – Contract	**FieldCode**:PRPSTR **005** **RTFDisplay**: <@PRPSTR**005**:Begin Contract@>	Begin Contract	Control structure to indicate contract beginning.
Quote Structure – Contract	**FieldCode**:PRPSTR **006** **RTFDisplay**: <@PRPSTR**006**:End Contract@>	End Contract	Control structure to indicate contract end.
Quote Structure – Contract	**FieldCode**:PRPSTR **007** **RTFDisplay**: <@PRPSTR**007**:Begin Contract Article@>	Begin Contract Article	Control structure to indicate contract article beginning.
Quote Structure – Contract	**FieldCode**:PRPSTR **008** **RTFDisplay**: <@PRPSTR**008**:End Contract Article@>	End Contract Article	Control structure to indicate contract article end.
Quote Structure – Pricing	**FieldCode**:PRPSTR **009** **RTFDisplay**: <@PRPSTR**009**:Begin Quote Header Promo Code@>	Begin Quote Header Promo Code	Control structure to indicate quote header promo code beginning.

Group	Entry Values	Field Name	Description
Quote Structure – Pricing	**FieldCode**:PRPSTR **010** **RTFDisplay**: <@PRPSTR**010**:End Quote Header Promo Code@>	End Quote Header Promo Code	Control structure to indicate quote header promo code end.

B

Dynamic Field Structure in RTF Files

This appendix covers the following topics:

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

Overview

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

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 enable 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 enable the parser to repeat the information for all the quotes associated with the proposal. Any quote related dynamic field placed outside the control structure is substituted using the first quote in the proposal.

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@>

Example of a Quote in an RTF File

Consider the following example:

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

Quote #1:

- 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

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.

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

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

What to expect:

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

Scenario 1: Output

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

Because there are no structure tokens, the parser does not know what section is a quote or what must be repeated. When the parser encounters a quote dynamic field it uses the values from the first 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.

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.

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 first quote information. In this case, the application knows that anything between PRPSTR001 and PRPSTR002 is a quote and must be repeated. Since there are two quotes on this proposal, this structure is 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 earlier.

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.

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

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

<@PRPSTR002:End Quote@>

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

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

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

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 is used from the first 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 is 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 is used during generation.

Valid

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

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 enable 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 through 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

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 supported**

  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.

Common Errors

Be aware of the following 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 result in 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 can 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.

C

Creating Java Program Dynamic Fields

This appendix covers the following topics:

- Overview
- Database Connection/Transaction

Overview

Refer to Creating User Defined Dynamic Fields, page 3-5 for information on creating user defined dynamic fields.

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 the following sections for explanation of benefits/disadvantages of using each approach.

Reusing the same database connection

If you use the same transaction or database connection, you can get profile option values, user details, or other information, 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.

Creating new database connection

You can create your own connection, but you cannot use data such as profile option values, or user details. 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.

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 perform the query. Refer to Sample Code Program , page C-2 for details.

If you use the **View Object**, the BC4J layer prepares the SQL statement. Also, the **View Object** meta data (SQL statement) is cached, for better performance during subsequent executions.

Registering Your Java Program

After 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. Refer to Creating User Defined Dynamic Fields, page 3-5 for information on field creation.

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 preceding steps before creating the dynamic field.

Java Program in Generated Proposal Versions

While generating the proposal version, Oracle Proposals calls the Java program to 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 replaces 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 the 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.

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.prp.
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!>";
}
}
}
```

D

Permissions for Oracle Content Manager

This appendix covers the following topics:

- Overview
- Seeded Folders
- Create Folder
- Add File from Desktop flow
- Uploading an Associated Version Flow
- Browse and Search Folders and Library Categories

Overview

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.**

Seeded Folders

The following table lists the recommended access for folder directories used in Oracle Proposals.

Seeded Folders

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

Create Folder

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

Permissions Given for Newly Created Folders

Flow	Permissions Given to Newly Created Folder	Directory that Folders are Created Under:
User	Manage Folder Manage Item Translate Item Read Item Create Sub-Folder Approve Item Approve Translation	Root/Sales Application/Users

Flow	Permissions Given to Newly Created Folder	Directory that Folders are Created Under:
Administrator	Manage Folder Manage Item Translate Item Read Item Create Sub-Folder Approve Item Approve Translation	Root/Sales Application/Administrators/Documents

Add File from Desktop flow

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

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/Sales Application/Administrators/Documents

Uploading an Associated Version Flow

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

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 are the same as the Add File from Desktop, page D-3 flow.

Browse and Search Folders and Library Categories

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

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.

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