

ORACLE PROPOSALS

ORACLE® E-BUSINESS SUITE

KEY FEATURES

- One-Click ease of Proposal Creation
- Powerful Personalization
- Flexible Proposal Management
- Enhanced Proposal Delivery
- Intelligent Proposal Content
- Proposal History Tracking
- Collaborative Proposal sharing across Sales Teams
- Multiple output formats supported (RTF, PDF)
- Include and attach multiple supporting documents to any proposal
- Easy-To-Use Administration and Document Maintenance

Oracle® Proposals automates and manages the creation of sales proposals. Oracle Proposals is a key component of the Oracle Customer Relationship Management solution, the integrated suite that drives profitable customer interactions.

Create Customized Proposals Quickly and Accurately

Complete, consistent, professionally formatted proposals are crucial to winning deals. But creating proposals offline in a word processor is laborious, repetitive, and produces inconsistent results. Oracle Proposals seamlessly integrates proposal creation into your sales workflow. The software creates proposals online from reusable templates, and saves even more time by automatically transferring previously collected information into the proposal. Oracle Proposals allows your sales staff to create professional, compliant proposals in hours rather than days. The Proposals Dashboard provides the end user with a centralized facility to create content, generate documents, include notes and tasks, electronically email proposals, and share proposals with other members of the sales team.

The screenshot shows the Oracle Proposals User interface. At the top, there's a navigation bar with 'Diagnostics Home Logout Preferences Help Personalize Page'. Below that, the 'Proposals' section is active. The main area is titled 'Update Proposal: Business Solution' and includes a 'Generate Proposal Document' button. The form contains several fields: 'Proposal Name' (Business Solution), 'Due Date' (19-Jan-2006), 'Customer Name' (Business World), 'Contact Name' (No Contact Selected), and 'Status' (Draft). There are also buttons for 'Delete' and 'Save'. Below the form, there's a 'Proposals Content' section with tabs for 'Generated Documents', 'Correspondence', 'Notes And Tasks', and 'Sales Team'. The 'Proposals Content' section shows a table of components with columns for 'Select Name', 'Description', 'Document', 'Complete', and 'Preview'. The table lists four components: 'Cover Sheet', 'Sentinel Custom Desktop Data Sheet', 'Sentinel Custom Desktop Case Study', and 'Sentinel Deluxe Desktop Case Study'. Each component has a checkbox, a description, a document name, a 'Complete' status (indicated by a green checkmark), and a 'Preview' button.

Select Name	Description	Document	Complete	Preview
<input type="checkbox"/> Cover Sheet	Cover sheet	Cover Sheet with Title	✓	
<input type="checkbox"/> Sentinel Custom Desktop Data Sheet	Sentinel Custom Desktop Data Sheet	Sentinel Custom Desktop Data Sheet	✓	
<input type="checkbox"/> Sentinel Custom Desktop Case Study	Sentinel Custom Desktop Case Study	Sentinel Custom Desktop Case Study	✓	
<input type="checkbox"/> Sentinel Deluxe Desktop Data Sheet	Sentinel Deluxe Desktop Data Sheet	Sentinel Deluxe Desktop Data Sheet	✓	
<input type="checkbox"/> Sentinel Deluxe Desktop Case Study	Sentinel Deluxe Desktop Case Study	Sentinel Deluxe Desktop Case Study	✓	

Figure 1. Quickly create professional proposals using the Proposals Dashboard

With Oracle Proposals, you can:

- Accelerate proposal creation
- Ensure proposal accuracy
- Ease process compliance

Accelerate Proposal Generation

Oracle Proposals slashes the time required to create, format, and deliver proposal documents.

Online Proposal Templates Reduce Production Time

Every proposal contains certain common elements—from company logos to boilerplate content. Salespeople often waste valuable time recreating this content or looking for old documents that contain it. Oracle Proposals reduces proposal production time by enabling the sales force to create and reuse templates that contain common content and formatting.

Personalized Proposals from Opportunities

Salespeople are often forced to waste time re-entering information that already exists in the company’s sales force automation system. Oracle Proposals solves this problem by creating a proposal directly from the opportunity. The application copies relevant information such as customer name and contact directly from the opportunity, eliminating the need for redundant data entry.

The screenshot shows the Oracle Dynamic Fields interface. At the top, it says 'ORACLE Dynamic Fields' and includes navigation links: 'Diagnostics Home Logout Preferences Help Personalize Page'. Below this is a section titled 'Dynamic Fields: User Defined' with a tip: 'TIP Click on a dynamic field name to see its details or click Create Dynamic Field to create one.' There is a 'Create Dynamic Field' button. The main part of the screenshot is a table with the following columns: Code, Name, Description, Type, Last Updated By, Last Update Date, In Use, RTF Display, and Delete. The table contains several rows of user-defined fields.

Code	Name	Description	Type	Last Updated By	Last Update Date	In Use	RTF Display	Delete
UDF011	Customer Logo		Image	PRPADMIN	27-Sep-2006	✓	<@UDF011:Customer Logo@>	
UDF010	Vision Comm - Confidentiality Text		Drop Down	COMMSUSER	02-May-2005	✓	<@UDF010:Vision Comm - Confidentiality Text@>	
UDF005	Cover Date	Cover Letter Date	Text	PRPADMIN	11-Jul-2003	✓	<@UDF005:Cover Date@>	
UDF004	Cover Text	Text for cover letter	Text	LJONES	20-Jun-2003	✓	<@UDF004:Cover Text@>	
UDF003	Cover Subject	Subject for cover letter	Text	LJONES	20-Jun-2003	✓	<@UDF003:Cover Subject@>	
UDF002	Confidentiality Text	Text for confidentiality statement	Drop Down	LJONES	20-Jun-2003	✓	<@UDF002:Confidentiality Text@>	
UDF001	Proposal Title	Title for Proposal	Text	LJONES	20-Jun-2003	✓	<@UDF001:Proposal Title@>	

Figure 2. Turn proposal content into a professionally formatted document with one click

One-click Generation Turns Content Into a Formatted Document

Oracle Proposals makes it easy to turn a completed proposal into a professionally formatted document. Once the sales representative has assembled the proposal from template components, a single click on the “Generate Proposal” button produces a complete, formatted proposal package in PDF or RTF format. The system dynamically pulls relevant information from data fields and tokens, and formats the resulting document in compliance with company standards.

Ensure Proposal Content Accuracy

Oracle Proposals ensures that the information contained in your proposals is current and accurate.

Dynamic Fields Accurately Reference Existing Information

Information that is manually transferred to a proposal from some other source is often inaccurate or outdated. Oracle Proposals ensures accurate information by dynamically referencing information that is already captured elsewhere in the sales system. For example, a quote field embedded in a proposal will automatically output the quoted pricing when the final document is generated. Field values can be entered by the user, provided by other parts or Oracle’s E-Business Suite, or retrieved via open interfaces from third-party software.

ORACLE Proposals User

Proposals >

Confirmation
The document BW Business Laptop Solution Version1.rtf sent by e-mail successfully.

Update Proposal: BW Business Laptop Solution

* Indicates required field

* Proposal Name: BW Business Laptop Solution
* Doe Date: 19-Jan-2006
Opportunity Name: Business World Jan006 Laptop Deal

Customer Name: Business World
Contact Name: Diane Lyon
Status: Draft

Template: Business Laptop Solution

Buttons: Delete, Save

Tabs: Proposal Content, Generated Documents, Correspondence, Notes And Tasks, Sales Team

Date	From	To	Version	Email Subject
14-Nov-2006	Jones, Mrs. Lisa	Diane Lyon	2	Business Laptop Solution Ver. 2
06-Nov-2006	Jones, Mrs. Lisa	Diane Lyon	2	Business Laptop Solution Ver. 2
24-Sep-2006	Jones, Mrs. Lisa	Diane Lyon (more...)	1	Business Laptop Solution

Figure 3. Oracle Proposals dynamically references information already in the application

Oracle Proposals also permits proposal users to provide an image as a dynamic field. Template administrators can, for example, place a dynamic field for logo in a template's cover sheet. This allows proposal creators to add the customer logo on proposal creation, or include electronic signatures on proposals.

Proposal Components Standardize Content

Assembling proposals from pre-approved components ensures consistent content. Templates can include multiple proposal components, including cover letters, executive summaries, and legal boilerplate. Administrators can define components and create multiple expressions of each component to match different requirements. For example, the component "Cover Letter" can include the documents "Simple Cover Letter" and "Professional Cover Letter." These documents are RTF files that store standard text, graphs, tables, dynamic fields, and more.

Guided Creation Ensures a Complete Proposal Package

The larger and more complex a proposal, the more care is needed to ensure that all required information is included. With Oracle Proposals, users can track progress as they build proposals and see "at a glance" whether each proposal component is complete. The application ensures that all required components are included in the finished document, and allows users to easily include, exclude, and reorder optional proposal components.

Ease Process Compliance

Oracle Proposals facilitates process compliance by enforcing the use of approved content and tracking proposal versions.

Pre-approved Content Reflects Corporate Policies

A proposal represents a commitment to customers, so every word must comply with corporate policy. Oracle Proposals enforces the use of pre-approved boilerplate content that has already received business and legal review. This content can include cover letters, product descriptions, and pricing information.

Versioning Support Maintains Provides Complete Audit Trail

Proposals often go through several versions, and it can be challenging to track changes in terms, or even know if the customer is reviewing the most current version. Oracle Proposals provides a complete version and change history that is refreshed each time a proposal is updated. Even when salespeople leave the organization, knowledge about the progress of the proposal and the deal is retained.

KEY BENEFITS

ORACLE PROPOSALS IS A MARKET LEADING SOLUTION THAT AUTOMATES AND MANAGES THE CREATION OF SALES PROPOSALS. ORACLE PROPOSALS IS A KEY COMPONENT OF THE ORACLE CUSTOMER RELATIONSHIP MANAGEMENT SOLUTION, THE INTEGRATED SUITE THAT DRIVES PROFITABLE CUSTOMER INTERACTIONS.

- Produce complete, consistent, professionally formatted proposals
- Assemble proposals from pre-approved components and ensure consistent content
- Leverage intelligent proposal construction with smart content
- Track the history of proposals sent to customers

RELATED PRODUCTS

The following products are available from Oracle:

- Oracle Sales
- Oracle Telesales
- Oracle Quoting

RELATED SERVICES

The following services are available from Oracle

Support Services:

- Oracle E-Business Suite Accelerators
- Oracle Application Solution Centers
- Oracle University
- Oracle Consulting

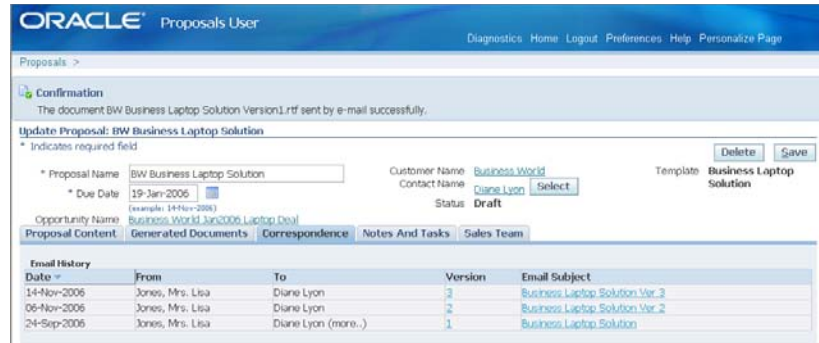


Figure 4. Email history provides access to the proposals that have been sent to customers

Customer Interactions Tracked through E-mail History

When salespeople deliver proposals through Oracle Proposals via email, the system tracks the history of these emails to capture them into the knowledge base surrounding that proposal. Tracking email recipients, the proposal version they received, and the contents of the Email enable salespeople and managers stay informed about the deal over time.

Collaborative Proposal sharing across Sales Teams

Sales team members and specialists, with different levels of access, can collaborate across the lifecycle of a proposal. Depending on their access level, proposal users can view or update proposals, notes and tasks. This increases productivity and communication of users, and allows higher quality proposals to be created. Integration with Territory Manager is also supported, allowing team members to be automatically assigned to proposals based on defined territory rules. This ensures that the right person is working on the right proposal at the right time.

Oracle E-Business Suite—The Complete Solution

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on unified information architecture. This information architecture provides a single definition of your customers, suppliers, employees, products—all aspects of your business. Whether you implement one module or the entire Suite, Oracle E-Business Suite enables you to share unified information across the enterprise so you can make smarter decisions with better information.

Contact Us

For more information about Oracle Proposals, please visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.



Oracle is committed to developing practices and products that help protect the environment

Copyright © 2009, Oracle and/or its affiliates. All rights reserved.

This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor is it subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners. 0408