

Proposal Screens

Enhancing the Proposal user interfaces

The proposal is one of the most central objects and events within this system. We will revisit it frequently during the development process. Prior to the preparation of this document, I took the liberty of doing a first pass of organizing the screens. They currently look like this:

New

New Proposal

[Save](#) [Save & New](#) [Cancel](#)

Location and Address Information

Project Name	<input type="text"/>	State/Province	-- Please select --
Street Address 1	<input type="text"/>	ZIP/Postal Code	<input type="text"/>
Street Address 2	<input type="text"/>	Country	United States
City	<input type="text"/>	Default Production Method	Production by Item
Proposal Images? <input checked="" type="checkbox"/>		D.O.T.	<input type="checkbox"/>
Location	<input type="text"/>	Followup Date	<input type="text"/>
Date Submitted	<input type="text"/>	Engineer	<input type="text"/>
Approximate Start Date	<input type="text"/>	Project Number	<input type="text"/>
Drawing Date	<input type="text"/>	Days to Accept	30
Last Revision Date	<input type="text"/>	Special Concrete	<input type="text"/>
Contract Amount	<input type="text"/>	Due Date	<input type="text"/>
Written Amount	<input type="text"/>	Customer	<input type="text"/>
Project Manager	<input type="text"/>	Priority	Normal
Opportunity	<input type="text"/>	Submit To	<input type="text"/>
Requested By	<input type="text"/>	Submit To Email	<input type="text"/>
Drawing Number	<input type="text"/>	Spec Date	<input type="text"/>
Spec Number	<input type="text"/>		

Task Information

Customers [Add Customer](#)

Customer

View

Proposal: State Route 80

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Proposal Info [Alternate Customers](#) [Documents](#) [Location](#) [Line Items](#) [Notes and Comments](#) [System Info](#)

Proposal Information

Proposal State Route 80	Customer Demo Company	Requested By Frank Mann
Project Number	Default Production Method Production by Item	Submit To Barney Rubble
Due Date 04/25/2014	Date Submitted	Submit To Email cellis@comcast.net
Location State Route 80 & I-75	D.O.T. <input checked="" type="checkbox"/>	Followup Date
Approximate Start Date	Last Revision Date	Priority Normal

Additional Information

Project Manager Craig Ellis	Engineer	Days to Accept 30
Drawing Date	Drawing Number	Special Concrete None
Spec Date	Spec Number	Proposal Images? <input checked="" type="checkbox"/>
Contract Amount	Written Amount	Quantity Calced By T.C.C.

Proposal Tasks [Attach Proposal Task](#) [New Proposal Task](#) [All Proposal Tasks](#)

Action	Proposal Task	Description	Due Date	Priority
Edit Del	State Route 80 proposal deadline	Finalize proposal and submit to customer	04/25/2014	Normal

Edit

Proposal: State Route 80

Location and Address Information

Project Name	<input type="text" value="State Route 80"/>	State/Province	Florida
Street Address 1	<input type="text"/>	ZIP/Postal Code	<input type="text"/>
Street Address 2	<input type="text"/>	Country	United States
City	<input type="text"/>	Default Production Method	Production by Item
Proposal Images?	<input checked="" type="checkbox"/>	D.O.T.	<input checked="" type="checkbox"/>
Location	<input type="text" value="State Route 80 & I-75"/>	Followup Date	<input type="text"/>
Date Submitted	<input type="text"/>	Engineer	<input type="text"/>
Approximate Start Date	<input type="text"/>	Project Number	<input type="text"/>
Drawing Date	<input type="text"/>	Days to Accept	30
Last Revision Date	<input type="text"/>	Special Concrete	None
Contract Amount	<input type="text"/>	Due Date	04/25/2014
Written Amount	<input type="text"/>	Customer	<input type="text"/>
Project Manager	<input type="text"/>	Priority	Normal
Opportunity	<input type="text"/>	Submit To	Barney Rubble
Requested By	Frank Mann	Submit To Email	cellis@comcast.net
Drawing Number	<input type="text"/>	Spec Date	<input type="text"/>
Spec Number	<input type="text"/>		

Task Information

Customer

Clearly the New and Edit screens need to be improved. I strongly urge you to master one screen, for us, that'll be the "View" screen and when you have settled on what you like, then track back and update the other two screens.

Before we get to those screens, I want to duplicate what we did on the views for opportunities, specifically, I like the row coloring and the status flags. We want to simply copy/paste the Edit Row Color settings we specified in the Opportunity view. I find it useful to have a notepad open to copy/paste both the color values and the formulas, so when I replicate for Proposals, I don't have to retype values.

Opportunity: Color Code View: All Opportunities

Color Codes

1	Due Date	less or equal	TODAY + 1	<input checked="" type="checkbox"/>	FF7070
2	Due Date	less or equal	TODAY + 3	<input checked="" type="checkbox"/>	FFFF08
3	--None--	--None--		<input type="checkbox"/>	FFFFFF
4	--None--	--None--		<input type="checkbox"/>	FFFFFF
5	--None--	--None--		<input type="checkbox"/>	FFFFFF

Now that we have the row colors, we'll need to duplicate the formula field from opportunities, as well as the two shared image fields. In the opportunity object, we created 3 shared image fields, but only ended up using two; one for high and one for low. We will do the same for the Proposal Object.

A quick look back to how that's done:

Opportunity: Edit Field

Save
Cancel

Field Properties

Field properties are global settings that apply to this field wherever it is presented for input or display.

Field Type Shared Image

Field Label Status High

You can specify text label to be used in the headers in **Views and Reports**. This label is optional. If not specified, Display Label will be used.

View Header

View Width pixels or %

Upload Image Choose File No file chosen (128KB max)

Current Image !

Width in Pixels 16

Height in Pixels 16

Alternative Text

“Status” was not really representative, as we’re indicating “Priority”, so we’ll use that for the Proposal Object. Create the Priority High and Priority Low shared image fields.

Edit Del	Priority High	Shared Image	priority_high	<input type="checkbox"/>
Edit Del	Priority Low	Shared Image	priority_low	<input type="checkbox"/>

Now we want to create the formula field to display the icons. Create a formula field “Visual Priority” and paste the formula from the opportunity. Grab the correct integration tokens from the helper and update the formula to support the proposal. Be SURE to set the return type to string. I made this mistake and it took a few minutes to figure out why my icons weren’t showing up. Adjust the view to reflect the order desired. I put priority right after the Proposal field.

Formula return type: **String**

```

if ("!proposal_priority#code)" == "NORMAL"){
  return "";
}
else if ("!proposal_priority#code}" == "HIGH"){
  return "{!ccProposal.priority_high#html}";
}
else if ("!proposal_priority#code}" == "LOW"){
  return "{!ccProposal.priority_low#html}";
}

```

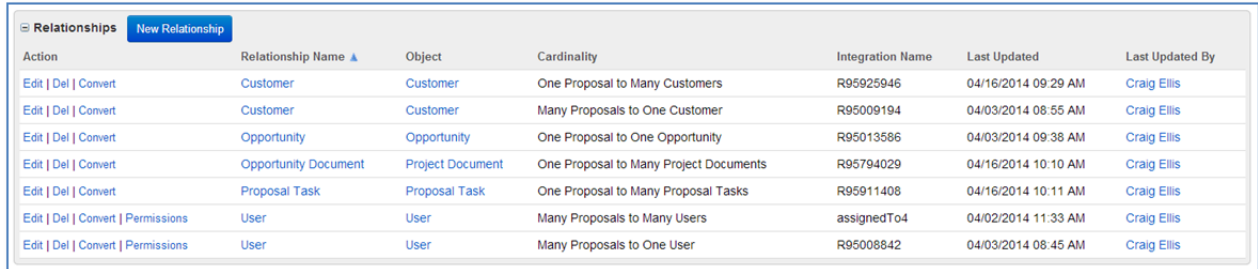
All Proposals New Proposal All Proposals Filter

Select More actions... Proposals 1-1 of 1

Action	Proposal	Priority	Due Date	Days Left	Customer	ID	Submit To Email
Edit Del	State Route 80	🟢	04/25/2014	9	Demo Company	95930929	cellis@comcast.net

Alternate Customers

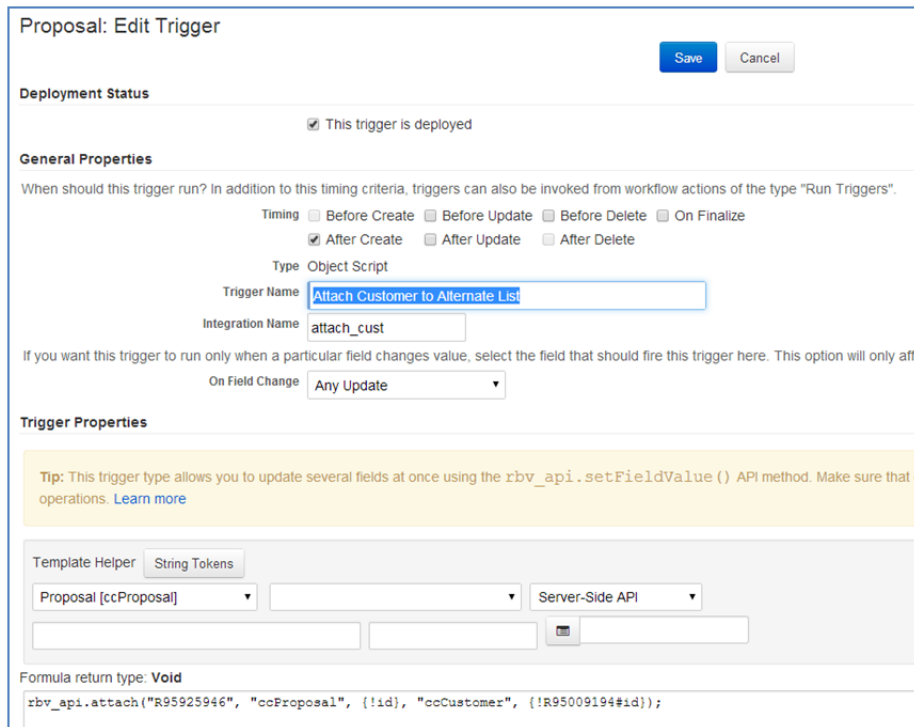
By Tincher Concrete's requirement, not only is a proposal assigned to a customer, but multiple customers bid on the same contract and ask for the same proposal from Tincher. As such, we want to create a new relationship to customers that will allow us to accomplish this. Under the Relationships section of the Proposal Object I created a new relationship "One Proposal to Many Customers".



Action	Relationship Name	Object	Cardinality	Integration Name	Last Updated	Last Updated By
Edit Del Convert	Customer	Customer	One Proposal to Many Customers	R95925946	04/16/2014 09:29 AM	Craig Ellis
Edit Del Convert	Customer	Customer	Many Proposals to One Customer	R95009194	04/03/2014 08:55 AM	Craig Ellis
Edit Del Convert	Opportunity	Opportunity	One Proposal to One Opportunity	R95013586	04/03/2014 09:38 AM	Craig Ellis
Edit Del Convert	Opportunity Document	Project Document	One Proposal to Many Project Documents	R95794029	04/16/2014 10:10 AM	Craig Ellis
Edit Del Convert	Proposal Task	Proposal Task	One Proposal to Many Proposal Tasks	R95911408	04/16/2014 10:11 AM	Craig Ellis
Edit Del Convert Permissions	User	User	Many Proposals to Many Users	assignedTo4	04/02/2014 11:33 AM	Craig Ellis
Edit Del Convert Permissions	User	User	Many Proposals to One User	R95008842	04/03/2014 08:45 AM	Craig Ellis

Now I will need to go back to my trigger and reflect this new relationship, because by default, the customer assigned to this proposal ALSO will need to appear in the list of alternate customers. Copy the integration name for the new relationship (R95925946) in this example to the clipboard.

While there is a type of trigger called "Attach Related Record", that doesn't really apply in this case, so we'll have to do it with an Object Script Trigger. The trigger is quite easy. Create the trigger below and test. Below the screen shot is the "layman" explanation of the api call.



Proposal: Edit Trigger

[Save](#) [Cancel](#)

Deployment Status

This trigger is deployed

General Properties

When should this trigger run? In addition to this timing criteria, triggers can also be invoked from workflow actions of the type "Run Triggers".

Timing Before Create Before Update Before Delete On Finalize

After Create After Update After Delete

Type Object Script

Trigger Name

Integration Name

If you want this trigger to run only when a particular field changes value, select the field that should fire this trigger here. This option will only affect triggers of type Object Script.

On Field Change

Trigger Properties

Tip: This trigger type allows you to update several fields at once using the `rbv_api.setFieldValue()` API method. Make sure that you use the correct field names for the operations. [Learn more](#)

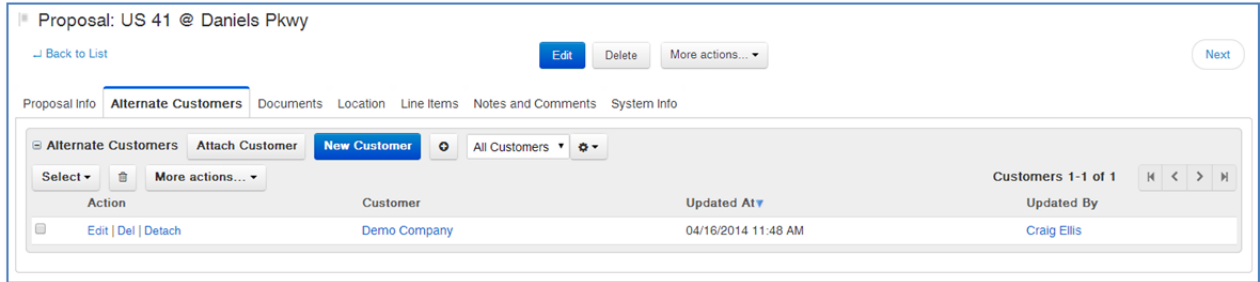
Template Helper

Formula return type: **Void**

```
rbv_api.attach("R95925946", "ccProposal", {!id}, "ccCustomer", {!R95009194#id});
```

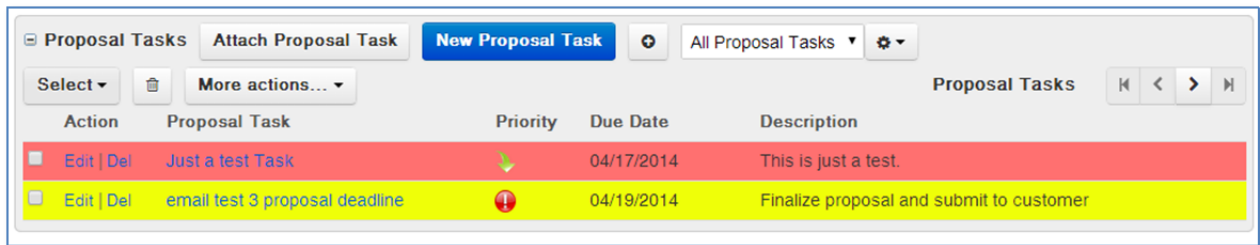
Rbv_api.attach("new relationship", "proposal integration name", current proposal id, "customer integration name", id of the single customer attached to proposal).

Create a new opportunity and test it. If all works correctly, the proposal will not only have the customer attached on the main screen, but you should now see it in the Alternate Customers tab.

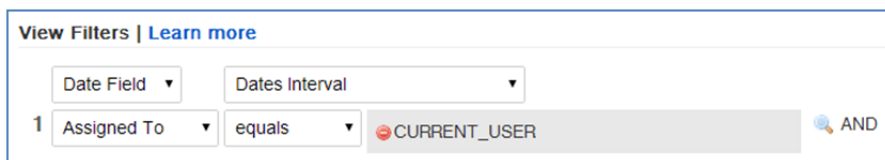


Proposal Views

Now we want to dress up the grid for Proposal Tasks to reflect the same row coloring and priority icons as we have done twice before; once on the Opportunity view and once on the Proposal view. Duplicate this logic on the Proposal Task view.



Once you are happy with the grid view, clone the view and call it “My Proposal Tasks”. Make sure you update the filter to include the “Assigned To” equals “CURRENT_USER”.



This will allow other users to create tasks for this proposal, but allow the current user to view only what applies to them. Remember, you will have to duplicate the row color logic.

Google Maps

Since we applied the "Location" attribute to our proposal, we are able to display a Google Map. I've added a tab to the Proposal View for Location. I simply added one section for the address information and a second section to hold the Google Map component.

Physical Location

(Text (100)) **Street Address**
1

(Text (100)) **Street Address**
2

(Text (100)) **City**
(Dependent Picklist)
State/Province

(Text (20)) **ZIP/Postal Code**

Google Map

(Google Map) **Google Map**

Proposal: email test 3

[Back to List](#) [Edit](#) [Delete](#) [More actions...](#) [Next](#)

Proposal Info [Alternate Customers](#) [Documents](#) **Location** [Line Items](#) [Notes and Comments](#) [System Info](#)

Physical Location

Street Address 1 16900 Gator Rd.

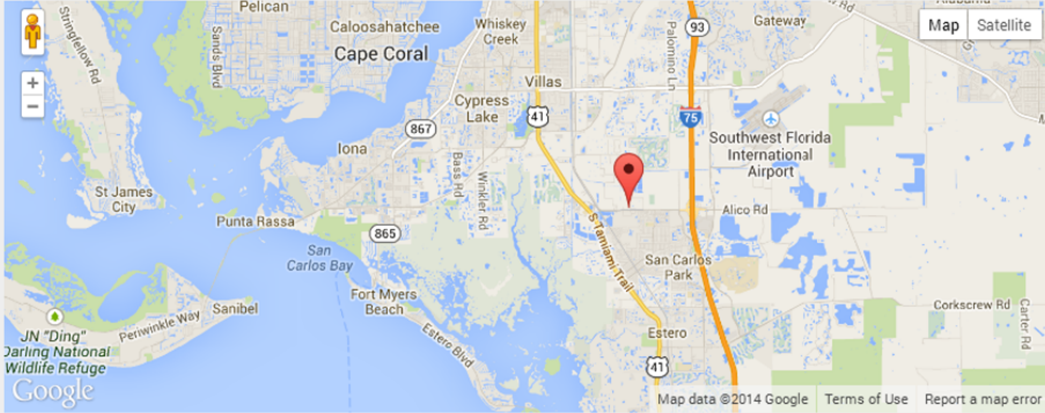
Street Address 2

City Fort Myers

State/Province Florida

ZIP/Postal Code 33912

Google Map



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