Opportunity Object

Creating and Populating the Bid Request Form (Document Template)

The original software system used a bulletin board and copied paper forms to enter a new bid. Granted the new system should encourage the elimination of paper documents, it is often desired by the client to hang on to such things for archival or other purposes. As such, we want to create a new Document Template that replicates this form and allows it to be generated by the click of a button.

While this form has a section for the Items Requested, it was discussed with the client that for the purposes of the bid request, we would ignore this. In fact, we originally had an Opportunity Line Item object, but it was removed, as the line items will be created in the physical proposal.

Since this document is a copy of a copy, and nobody seems to

know where the original is, we need to duplicate it in Microsoft Word. Make SURE you save it with the .DOC extension and NOT the .DOCX. Rollbase does not support the newer format. Building a document template is very much like doing a mail merge in Word, except

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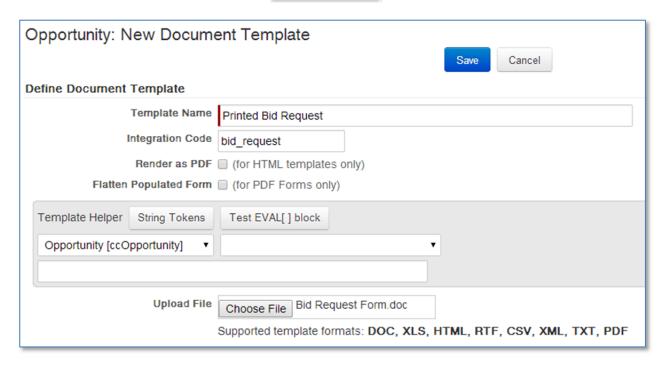
the merge fields will be the integration names of the fields in question, surrounded by {! }. This is where it becomes useful to have multiple monitors on your computer. On one screen, have the

Opportunity object definition visible, and on the other screen your Word document. Build the document and assign your merge fields.

IMPORTANT NOTE: DO NOT copy/paste the integration names to your word document. The extra html formatting will prevent the merge from working correctly. If you manually type the first one directly in Word, you can copy/paste and then edit those tokens. ALSO NOTE: integration names are case sensitive.

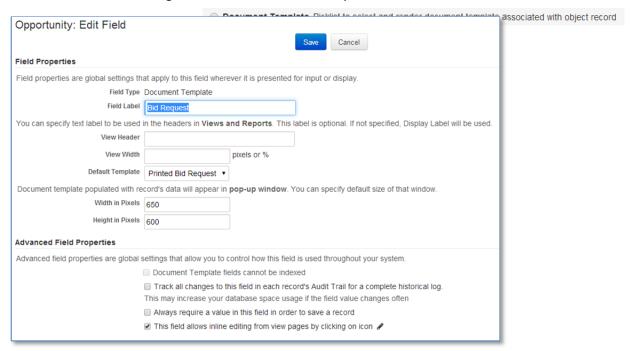
Uploading the Form to a Template

Once you have completed your form (or for that fact, while you are building it), you can create a new Template in the object definition. Click the New Document Template button and fill out the screen as shown:



Create a Document Template Field

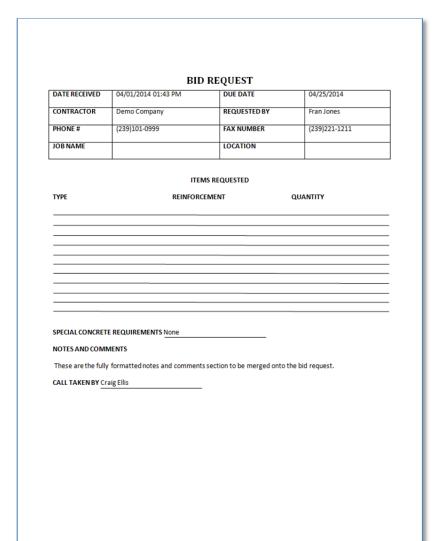
In order to automate the generation of this document, you will need to create a new field to hold the



template that we just created. Give it a Field Label of "Bid Request", but most importantly, choose the default template in the drop down provided. This template will now be assigned to all new opportunities.

You can now use this field anywhere on your grids or your view forms. (On edit and new, you get the drop down to select the form) If we add this column to the Opportunities view, you can simply generate the document directly from the list by clicking on the hyperlink.





Clicking on the link will then download a merged document for you to view, print or email.