

# Proposal Object

## Creating and populating the Proposal Object

The Proposal object is one of the most central objects in the entire system. Much like opportunities, proposals will be assigned to a particular user (Project Manager). As a central object, we'll go ahead and create a new Object (with Tab).

While the Opportunity object was considered a Task, we will not assign that attribute to the Proposal, even though it has a due date, because we will have an entire child object related to Job Tasks, with several default tasks auto-created, including proposal deadline.

Because we did not apply the Task attribute, we did not automatically get the "AssignedTo" field. In order to accomplish this, we had to add a many-to-one relationship for proposals to users (project managers). A many-to-many relationship already existed,

Relationships		New Relationship	
Action	Relationship Name	Object	Cardinality
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Convert</a>   <a href="#">Permissions</a>	User	User	Many Proposals to Many Users
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Convert</a>   <a href="#">Permissions</a>	User	User	Many Proposals to One User

which is not what we needed. Add the many-to-one as shown here. That will add the field we are looking for, which we can rename to Project Manager. Since the Customer object already exists, we will also need to add a many-to-one relationship as well.

Like Opportunities, we're also going to add a Days Left field with the same formula used before. This is a nice feature to have on our grid views. Simply copy/paste the formula from the Opportunity object and change the one single field for due date to reflect the integration name of the proposal's due date. We will also want the same color-coding of grid rows, so you can also copy/paste those settings from the Opportunity grids.

We will circle back to the proposal object, but now that we have the basic object in place, we are now ready to create the last workflow action and data map on the Opportunity object to create the proposal and delete the opportunity.

Proposal
<b>Integer</b> id <b>Text</b> name <b>Checkbox</b> useImagesOnProposal [Y] <b>Picklist</b> defaultProductionMethod <b>Text</b> location <b>Checkbox</b> isDOT <b>Date</b> dateCreated <b>Date</b> dateDue <b>Date</b> dateSubmitted <b>Date</b> dateToFollowup <b>Text</b> submittedTo <b>Date</b> dateApproximateStart <b>Text</b> engineer <b>Date</b> dateDrawing <b>Text</b> projectNumber <b>Date</b> dateLastRevision <b>Integer</b> daysToAccept <b>Double</b> contractAmount <b>Text</b> specialConcrete <b>Text</b> writtenAmount
Attributes
<b>Attribute</b> Location <b>Attribute</b> Flagging
Relationships
<b>Relationship</b> Customer <b>Relationship</b> Proposal Phases <b>Relationship</b> Proposal Documents <b>Relationship</b> Proposal Notes <b>Relationship</b> Proposal Tasks <b>Relationship</b> Job
Permissions
<b>Permission</b> administrators
Views
<b>View</b> new <b>View</b> edit <b>View</b> view