



QProposal

User Guide

Functionality

This app allows your company to create and collect responses for RFP/RFI documents. The following pages will guide the administrator through setting up the app and starting to collaborate with others.

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Installation

1. Install Managed Package

- QProposal can be installed as an installed package (permissions will be granted in the next step).

Install QProposal
By CloudQ

☒ Install for Admins Only
 ☐ Install for All Users
 ☐ Install for Specific Profiles...

Install **Cancel**

App Name	Publisher	Version Name	Version Number
QProposal	CloudQ	QProposal	1.2

Description
QProposal is a time-saving tool. Anyone who's created an RFP/RFI understands the time it takes to prepare and brand the requirements template, get approval for it, and then collaborate with each department to gather requirements. We solve all that.

[Additional Details](#) [View Components](#)

Install QProposal
By CloudQ

This app is taking a long time to install.
 You will receive an email after the installation has completed.

Done

App Name	Publisher	Version Name	Version Number
QProposal	CloudQ	QProposal	1.2

Description
QProposal is a time-saving tool. Anyone who's created an RFP/RFI understands the time it takes to prepare and brand the requirements template, get approval for it, and then collaborate with each department to gather requirements. We solve all that.

Set Permissions

1. Go to: Setup>Permission Sets

Select BA Permission Sets>Manage Assignments. Select Add Assignments and add the users' information.

Assigned Users
BA Permission sets
[Back to: Permission Set](#)

[Add Assignments](#) [Remove Assignments](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	BA Testing	Batcat01	[REDACTED]	9/23/2020, 8:17 AM		✓	Standard Platform User	

[Add Assignments](#) [Remove Assignments](#)

Select CEO/CTO Permission Sets>Manage Assignments. Select Add Assignments, and add the users' information.

Assigned Users
CEO/CTO/COO Permission sets
[Back to: Permission Set](#)

[Add Assignments](#) [Remove Assignments](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	CEO	CEO	[REDACTED]	9/23/2020, 6:14 AM		✓	Standard Platform User	

[Add Assignments](#) [Remove Assignments](#)

Select Developer Permission Sets>Manage Assignments. Select Add Assignments, and add the users' information.

Assigned Users
Developer Permission Sets
[Back to: Permission Set](#)

[Add Assignments](#) [Remove Assignments](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Dev	DEV	[REDACTED]	9/17/2020, 3:32 AM		✓	Standard Platform User	

[Add Assignments](#) [Remove Assignments](#)

- Select Project Manager Permission Sets>Manage Assignments. Select Add Assignments, and add the users' information.

Assigned Users
Project Manager Permission Sets
[Back to: Permission Set](#)

[Add Assignments](#) [Remove Assignments](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Project Manager	PM		9/17/2020, 3:29 AM		✓	Standard Platform User	

[Add Assignments](#) [Remove Assignments](#)

- Select Sales Coordinator Permission Sets>Manage Assignments. Select Add Assignments, and add the users' information.

Assigned Users
SC Permission sets
[Back to: Permission Set](#)

[Add Assignments](#) [Remove Assignments](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Sales Coordinator	Sale		9/23/2020, 10:10 PM		✓	Standard Platform User	

[Add Assignments](#) [Remove Assignments](#)

Editing Profile Permissions

- ✚ Select a stakeholder's profile and navigate to: Client Opportunities Field-Level Security.
- ✚ Click: View of client opportunities, RFP/RFI and Template.
- ✚ Uncheck: **read access for all fields.**

Refer to the following screenshots.

For client opportunities.

Client Opportunities Field-Level Security for profile
Standard Platform User Help for this Page

Field Name	Field Type	Read Access	Edit Access
Business Analyst	Lookup	☐	☐
Business Analyst Email	Email	☐	☐
Business Analyst Name	Text	☐	☐
CEO	Lookup	☐	☐
Comments	Long Text Area	☐	☐
Created By	Lookup	☒	☐
CTO	Lookup	☐	☐
Initial Requirements	Rich Text Area	☐	☐
Last Modified By	Lookup	☒	☐
Opportunity Name	Text	☒	☒
Owner	Lookup	☒	☒
Practice Lead	Lookup	☐	☐
Stage	Picklist	☒	☒

For RFI/RFP

RFI/RFP Field Level Security for profile: Standard Platform User

[Help for this Page](#)

Field Name	Field Type	Read Access	Edit Access
Architecture Diagram	Rich Text Area	☐	☐
Architecture Diagram	Checkbox	☐	☐
Assigned To	Lookup	☐	☐
Assigned To	Lookup	☐	☐
Assigned To	Lookup	☐	☐
Assigned To	Text	☐	☐
Bid Email	Email	☐	☐
Business Requirement	Rich Text Area	☐	☐
Business Requirement	Checkbox	☐	☐
Change Request	Text Area	☐	☐
Comments	Rich Text Area	☐	☐
Completed Architecture Diagram	Checkbox	☐	☐
Completed BRD	Checkbox	☐	☐
Completed Cost Estimation	Checkbox	☐	☐
Completed Functional Diagram	Checkbox	☐	☐
Completed High Level Design	Checkbox	☐	☐
Completed Legal Compliance	Checkbox	☐	☐
Completed Low Level Design	Checkbox	☐	☐
Completed Pre-Existing Template	Checkbox	☐	☐
Completed Project Plan	Checkbox	☐	☐
Completed Questionnaire	Checkbox	☐	☐
Completed Tax Document	Checkbox	☐	☐
Completion Status	Text	☐	☐
Completion Status	Text	☐	☐
Completion Status	Text	☐	☐
Completion Status	Text	☐	☐
Cost Estimation	Rich Text Area	☐	☐
Cost Estimation	Checkbox	☐	☐
Count	Number	☐	☐
Created By	Lookup	☒	☐
ETA	Date	☐	☐
ETA	Date	☐	☐
ETA	Date	☐	☐
ETA	Date	☐	☐
ETA	Date	☐	☐
ETA	Date	☐	☐
ETA	Date	☐	☐
ETA	Date	☐	☐
ETA	Date	☐	☐
ETA	Date	☐	☐
Functional Diagram	Rich Text Area	☐	☐
Functional Diagram	Checkbox	☐	☐
High Level Design	Rich Text Area	☐	☐
High Level Design	Checkbox	☐	☐
Last Modified By	Lookup	☒	☐
Legal Compliance	Checkbox	☒	☐
Legal Compliance	Rich Text Area	☐	☐
Low Level Design	Rich Text Area	☐	☐
Low Level Design	Checkbox	☐	☐
Opportunity	Lookup	☐	☐
Overall Completion Percentage	Percent	☐	☐
Overall Completion Status	Text	☐	☐
Owner	Lookup	☒	☒
Percentage Completed	Percent	☐	☐
Percentage Completed	Percent	☐	☐
Percentage Completed	Percent	☐	☐
Legal Compliance	Checkbox	☐	☐
Legal Compliance	Rich Text Area	☐	☐
Low Level Design	Rich Text Area	☐	☐
Low Level Design	Checkbox	☐	☐
Opportunity	Lookup	☐	☐
Overall Completion Percentage	Percent	☐	☐
Overall Completion Status	Text	☐	☐
Owner	Lookup	☒	☒
Percentage Completed	Percent	☐	☐
Percentage Completed	Percent	☐	☐
Percentage Completed	Percent	☐	☐
Percentage Completed	Percent	☐	☐
Percentage Completed	Percent	☐	☐
Percentage Completed	Percent	☐	☐
Percentage Completed	Percent	☐	☐
Percentage Completed	Percent	☐	☐
Percent Value	Number	☐	☐
Pre-Existing Template	Rich Text Area	☐	☐
Pre-Existing Template	Checkbox	☐	☐
Project Plan	Rich Text Area	☐	☐
Project Plan	Checkbox	☐	☐
Questionnaire	Checkbox	☐	☐
Questionnaire	Rich Text Area	☐	☐
RFI/RFP Name	Text	☒	☒
Stage	Percent	☒	☒
Tax Document	Checkbox	☐	☐
Tax Document	Rich Text Area	☐	☐
Template	Lookup	☐	☐

For Template object

Template Field-Level Security for profile
Standard Platform User

[Help for this Page](#)

Field Name	Field Type	Read Access	Edit Access
Created By	Lookup	☒	☐
Footer	Rich Text Area	☐	☐
Front Page	Rich Text Area	☐	☐
Header	Rich Text Area	☐	☐
Last Modified By	Lookup	☒	☐
Last Page	Rich Text Area	☐	☐
Owner	Lookup	☒	☒
Template Name	Text	☒	☒

[Edit](#) [Back to Profile](#)

Approving an RFP/RFI

- Go to: Setup>Approval Process. Select Client Opportunities from Manage Approval Process.
- Click the drop down, and select Use Jump Start Wizard.

Approval Process Jump Start Wizard
Client Opportunities

Save Cancel

Approval Process Information * Required Information

The Jump Start wizard creates a one-step approval process for you in just a few minutes.

Enter a name for your process in the box below and then select an email template to notify the approver (optional).

Name

Unique Name

Approval Assignment Email Template

Use Approver Field of Client Opportunities Owner ☐

Add the Submit for Approval button and Approval History related list to all Client Opportunities page layouts ☒

Specify Entry Criteria

Use this approval process if the following criteria are met:

Field	Operator	Value	
Client Opportunities: Stage	equals	BA Review	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic...

- Select the users (stakeholders) who want to approve the RFP.

Select Approver

Using the options below, specify the user to whom the approval request should be assigned.

☐ Let the submitter choose the approver manually.
☐ Automatically assign an approver using a standard or custom hierarchy field:
☐ Automatically assign to queue.
☒ Automatically assign to approver(s):

User

Add Row Remove Row

When multiple approvers are selected:

☒ Approve or reject based on the FIRST response.
☐ Require UNANIMOUS approval from all selected approvers.

Because this is the Jump Start Wizard, Salesforce automatically chooses some settings for you. [Show More](#)

Save Cancel

Click Edit and select the approval page layout.

Approval Process Editor
RFP Approval

Step 5: Select Fields to Display on Approval Page Layout

Step 5 of 6

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields

- Business Analyst
- CEO
- Created By
- CTO
- Last Modified By
- Practice Lead

Selected Fields

- Opportunity Name
- Stage
- Initial Requirements
- Business Analyst Name
- Business Analyst Email
- Comments
- Owner

Approval Page Fields

☒ Display approval history information in addition to the fields selected above

Security Settings

☒ Allow approvers to access the approval page only from within the Salesforce application. (Recommended)

☐ Allow approvers to access the approval page from within the Salesforce application, or externally from a wireless-enabled mobile device

Click Edit.

Select the Initial Submitters.

Select the stakeholders who want to submit for approval.

Approval Process Editor
RFP Approval

Step 6: Specify Initial Submitters

Step 6 of 6

Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

Initial Submitters

Submitter Type: Search: Owner for []

Available Submitters

- Client Opportunities Owner

Allowed Submitters

- User: BA Testing

Submission Settings

☐ Allow submitters to recall approval requests

- Update the initial submission actions, approval steps, final approval actions, and final rejection actions.

Created By: [Step Admin](#) 9/21/2025, 3:17 AM Modified By: [Step Admin](#) 9/25/2025, 11:47 PM

Initial Submission Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Field Update	State Update
Edit Remove	Email Alert	CEO/CTO Approval Process

Approval Steps

[Show Actions](#) [Edit](#) 1

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
		RFP Approval			VP, CEO	Final Rejection

Final Approval Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Approved Email Alert
Edit Remove	Field Update	Approved State Update

Final Rejection Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing
Edit Remove	Email Alert	Crash Out
Edit Remove	Field Update	Crash Out State Update

Recall Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing

[Back To Top](#) Always show me [more](#) records per related list

Sharing an RFP/RFI

- ✚ Click APP Launcher.
- ✚ Enter Reports.
- ✚ Click All Folders.
- ✚ Click the drop-down box of RFP.
- ✚ Click Share.
- ✚ Select the users who want to see the RFP reports.

Share folder

These sharing settings apply to all subfolders in this folder.

Share With
Users

Names
Search Users...

Access
View

Share

Who Can Access

User	Access	Action
Users	View	X
Users	View	X
Users	View	X
Users	View	X
Users	Manage	X

Done

- ✚ Click APP Launcher.
- ✚ Enter Dashboards.
- ✚ Click All Folders.
- ✚ Click the drop-down box of RFP.
- ✚ Click Share.
- ✚ Select the users who want to see the RFP reports.

Share folder

These sharing settings apply to all subfolders in this folder.

Share With

Users

Names

Search Users...

Access

View

Share

Who Can Access

Search

Users	View	×
Users	View	×
Users	View	×
Users	View	×
Users	Manage	×

Done

Explaining Stakeholder Roles

-  CTO
-  Sales Lead
-  Sales Coordinator
-  Project Manager
-  Business Analyst
-  Team Lead
-  Consultant Architect

These are the key roles involved in creation of an RFP or RFI.

They're defined by QProposal, by default, as follows:

<u>CTO</u>	<u>Chief Technical Officer</u>
<u>Sales Lead and Sales Coordinator</u>	<u>Sales Coordinator</u>
<u>Project Manager</u>	<u>Project Manager</u>
<u>Business Analyst</u>	<u>Business Analyst</u>
<u>Team Lead and Consultant Architect</u>	<u>Developer</u>

Workflow Walkthrough

1. Client Opportunity Pipeline

Your sales coordinator starts with an initial draft stage where they choose the parameters by which the RFP/RFI will be created. This will then be moved to the BA review stage. Your BA will review and send to the CTO for approval by clicking on the **submit for approval** button. This button only carries the trigger for prompting the approval process. Your CTO will then access their email and click on a link to view the RFP/RFI and approve or deny the request. The CTO can then click on approve and move the request to the approved stage. Your BA can then login to review the client opportunity. If there is no scope, the project also can move into the Drop Out stage. In both scenarios, an email will be triggered to your BA that the RFP/RFI has been created.

The screenshot displays the CloudQ application interface for managing Client Opportunities. The top navigation bar includes a search bar and various utility icons. The main header shows the current view is 'Client Opportunities' with a 'Test' sub-header. Below this, a summary row displays the 'Stage' as 'Initial Draft', the 'Business Analyst Name' as 'surabhi dutta', and the 'Business Analyst Email' as 'surabhi@cloudq.net'. Action buttons for 'Edit', 'Submit for Approval', and 'Sharing' are visible.

The 'Details' section features a progress bar with stages: Initial Draft (active), BA Review, Submit for Appr..., Approved, Drop Out, Closed Won, and Closed Lost. A 'Mark Stage as Complete' button is present next to the 'Initial Draft' stage.

Below the progress bar, a table lists the details for the 'Initial Draft' stage:

Field	Value	Action
Opportunity Name	Test	
Owner	shaik faiz	
Business Analyst Name	surabhi dutta	
Initial Requirements	Draft	
Business Analyst Email	surabhi@cloudq.net	
Comments		
Created By	shaik faiz, 3/10/2021, 2:38 AM	
Last Modified By	shaik faiz, 3/10/2021, 2:38 AM	

On the right side, there are three expandable sections: 'Notes & Attachments (0)' with an 'Upload Files' button, 'RFP/RFI (0)', and 'Approval History (0)'.

2. RFP Pipeline

Assigning Work

Stakeholder: BA

Once the RFP/RFI is created, your BA will be notified to assign work to stakeholders. Your BA can now assign permitted assignees for permitted activities.

The screenshot shows the 'RFP/RFI Test' form in the 'Assign to Work' stage. The form includes the following fields and controls:

- Assigned To:** shank faizl
- Tax Document:** Salesforce Sans
- ETA:** 3/10/2021
- Percentage Completed:** 0%
- Completion Status:** This field is calculated upon save.
- Completed Tax Document:** ☐
- Buttons:** Cancel, Save

The screenshot shows the 'RFP/RFI Test' form in the 'Details' tab. The form displays the following information:

- Stage:** Assign to Work
- Overall Completion Percentage:** 0%
- Overall Completion Status:** This field is calculated upon save.
- Related Details:**
 - Assign to Work:** Mark Stage as Complete
 - RFP/RFI Name:** Test
 - Opportunity:** Test
 - Owner:** shank faizl
 - Change Request:** Change Request
 - Overall Completion Percentage:** 0%
 - Overall Completion Status:** This field is calculated upon save.
 - Stage:** Assign to Work
 - Administration Activities:**
 - Assigned To:** shank faizl
 - Tax Document:** Salesforce Sans
 - ETA:** 3/10/2021
- RFP/RFI Completion Status:** No data.
- View Report:** As of Today at 2:54 AM

Stakeholder: Sales coordinator

Permission sets can be made different for each stakeholder assigned, as per company hierarchy settings.

BSA Activities

Stakeholder: Business Analyst

Permission sets can be made different for each stakeholder assigned, as per company hierarchy settings.

Technical Activities

Stakeholder: Developer

Permission sets can be made different for each stakeholder assigned, as per company hierarchy settings.

PM Activities

Stakeholder: PM

Permission sets can be made different for each stakeholder assigned, as per company hierarchy settings.

Template Skelton

In this phase, a template can be added, or you can select from the templates available in QProposal. You will get a container with First Page, Last Page, Header, and Footer which are most common. Your documents will get aligned in the correct order, with the correct pagination, when your document is generated. Once the template is selected and assignments are made, notifications will go to the assigned stakeholders. They can login and start working on the respective documents, manipulating the rich text area assigned to them.

In Progress

Stakeholder: Assigned Stakeholder

Many stakeholders can work in parallel. Until the stakeholder checks the work completed checkbox, the pipeline will show in progress. Each stakeholder can update the percentage, and it will be auto color coded, with red being the lesser percentage and green being the greater. This percentage of work completed will be auto populated for your BA. Once all the stakeholders complete their assigned sections, the request will change to a work completed status. If the deadline is today for any of the documents and has not been completed, an email will be triggered for the respective stakeholder with a completion reminder.

The screenshot displays the 'RFP/RFI Test' interface. At the top, there's a navigation bar with 'RFP', 'Home', 'Client Opportunities', 'RFP/RFI', 'Templates', 'Reports', and 'Dashboards'. The 'RFP/RFI' section is active, showing a 'Test' status. The 'Overall Completion Percentage' is 100%, indicated by a green bar. The 'Stage' is 'In Progress'. Under 'Administration Activities', there's a table with columns for 'Assigned To', 'Tax Document', 'Percentage Completed', 'ETA', 'Completion Status', and 'Completed Tax Document'. The table shows two entries: one for 'shahid' with 100% completion and an ETA of 3/10/2021, and another for 'Immigration team' with 0% completion. A 'View Report' button is visible on the right. The bottom section contains a text area with information about the immigration team's role in the system.

Finalized

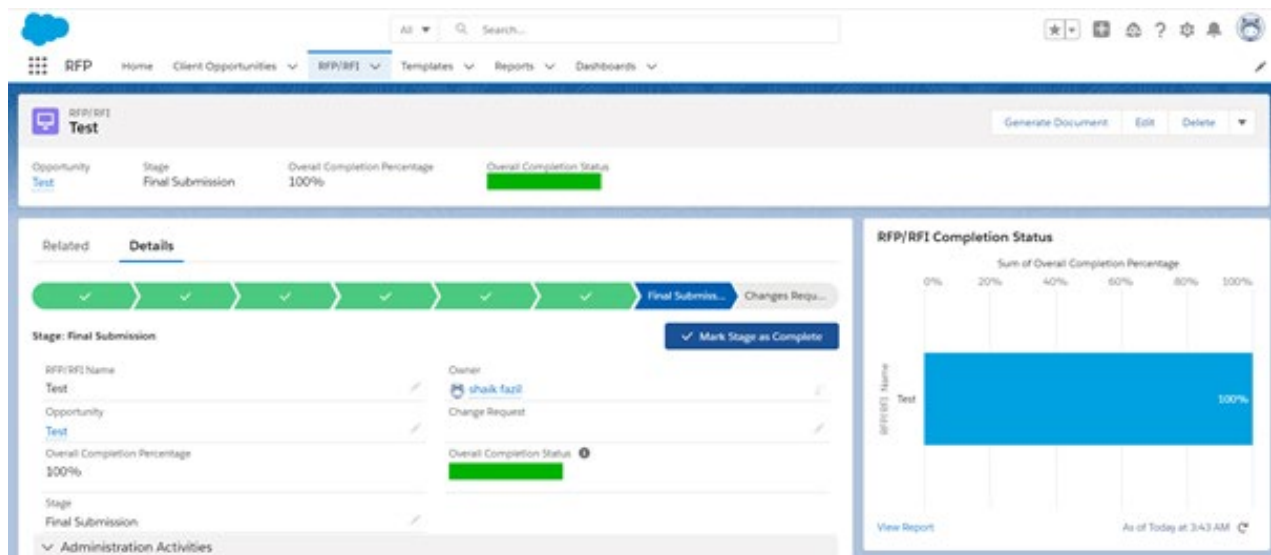
Stakeholder: BA

Your BA will get notified once all the documents are completed. In this phase, he or she can review and finalize the document and move it to the BA submitted stage or decide a document needs improvement and uncheck the work completed checkbox. In the latter case, this will require that the stakeholder update the specific document and recheck the box. If your BA chooses to finalize, he or she may choose to generate the documents. This will then be downloaded and attached to the RFP/RFI. Then it will be moved from the BA submitted stage to the SC review stage if the document is available in the attachments.

SC Review/Final Submission/Change Request

Stakeholder: Sales Coordinator

The Sales coordinator logs in and moves the request to the change request stage and provides changes required via review comments in the text area. Your BA will be notified. He or she will login again, look for the changes mentioned, and review. He or she will uncheck the documents needing further changes and will alert the stakeholders. Now, the RFP will move to the in-progress stage and will remain there until the changes are made by the stakeholders and they check the work completed box again. If the sales coordinator finds the RFP generated sufficient, it will go to final submission. Outside the system, the RFP copy will be submitted to the bid portal for deal proceedings with the client.



Client Opportunity Closure

Once the sales coordinator submits the generated proposal to the bid portal, he or she can then look for the closure of the deal. When sales coordinators have results to share, they need to come to the client opportunity and mark it as closed won or closed lost, ending the pipeline there.

Technical Support

If you have questions, issues, or concerns, please do not hesitate to contact our support team.

Via email:

saddam@cloudq.net

Via mail:

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6110 McFarland Station Dr,
Suite #201, Alpharetta, GA, USA

Via phone:

+1 (404) 410-1441