QPROPOSAL

Streamline your RFP/RFI process.

Powered by CLOUDQ

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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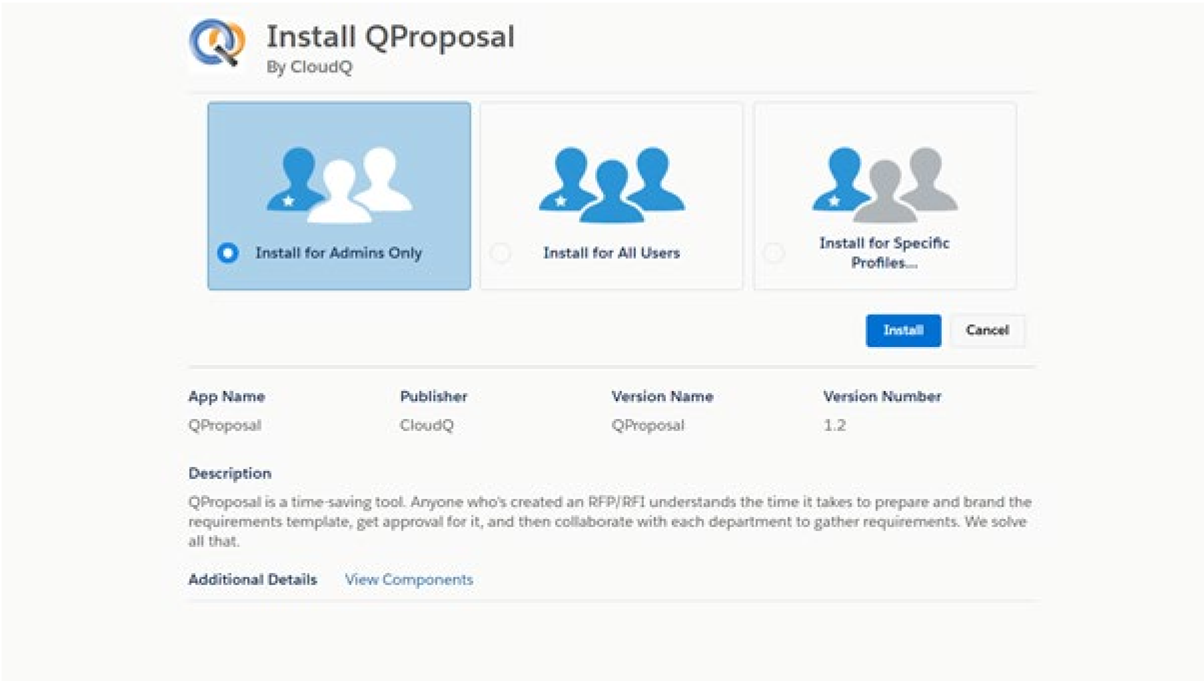
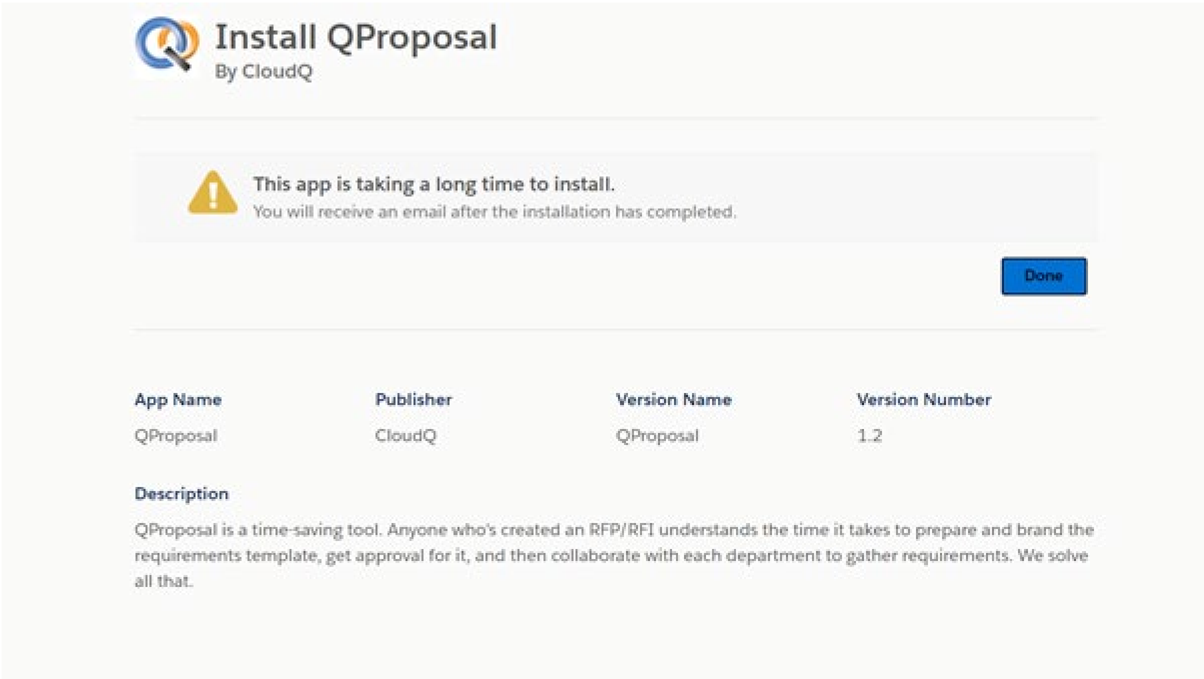
Installation

1. Install Managed Package

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



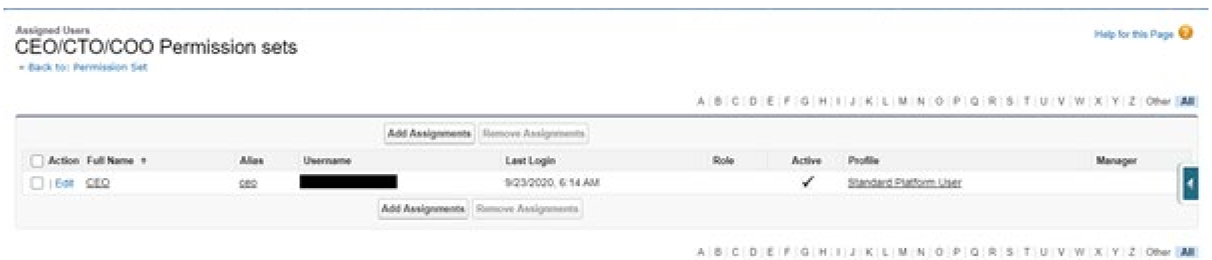


Set Permissions

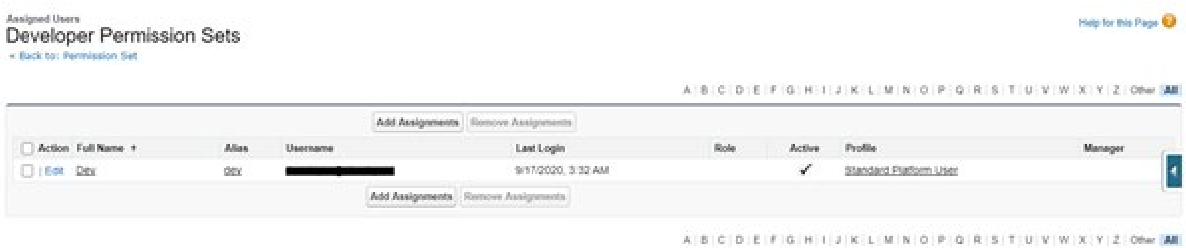
1. Go to: Setup>Permission Sets

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

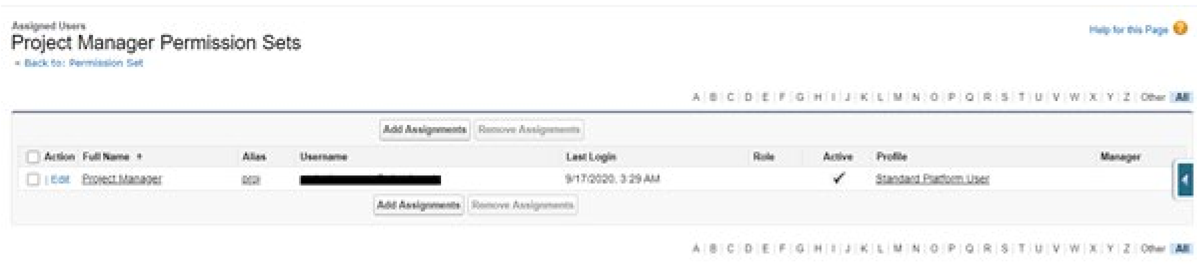
- Select CEO/CTO Permission Sets>Manage Assignments. Select Add Assignments, and add the users' information.



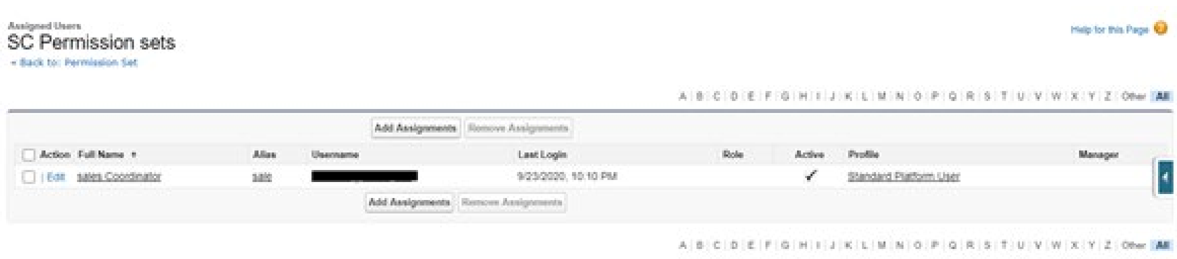
- Select Developer Permission Sets>Manage Assignments. Select Add Assignments, and add the users' information.



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



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



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

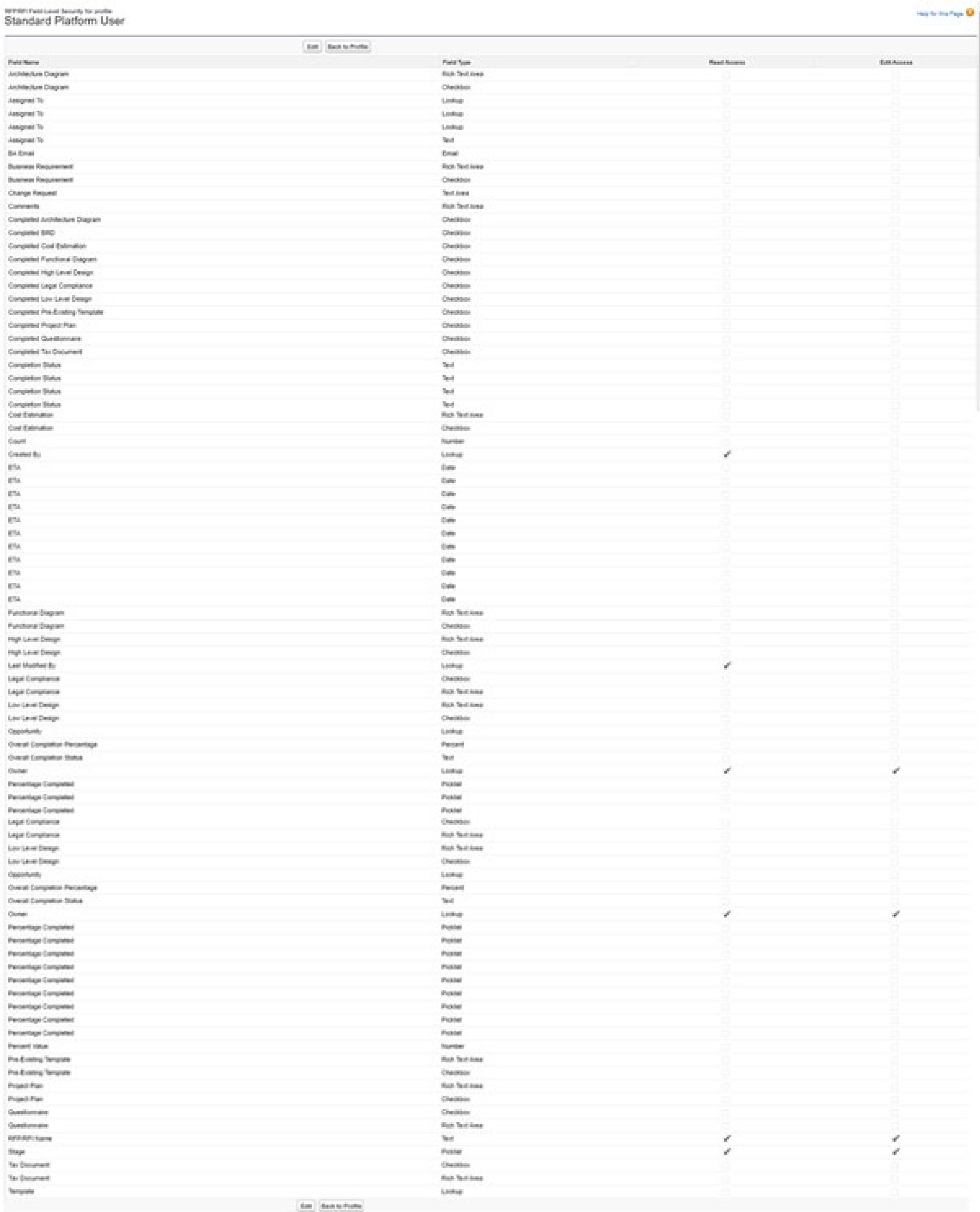
Help for this Page

Edit | Back to Profile

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	✓	✓

Edit | Back to Profile

For RFI/RFP



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

Help for this Page

Edit | Back to Profile

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		
BA 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		
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	Picklist		
Percentage Completed	Picklist		
Percentage Completed	Picklist		
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	Picklist		
Percentage Completed	Picklist		
Percentage Completed	Picklist		
Percentage Completed	Picklist		
Percentage Completed	Picklist		
Percentage Completed	Picklist		
Percentage Completed	Picklist		
Percentage Completed	Picklist		
Percentage Completed	Picklist		
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		
RFP/RFI Name	Text	✓	✓
Stage	Picklist	✓	✓
Tax Document	Checkbox		
Tax Document	Rich Text Area		
Template	Lookup		

Edit | Back to Profile

For Template object

Template Field-Level Security for profile
Standard Platform User

Help for this Page

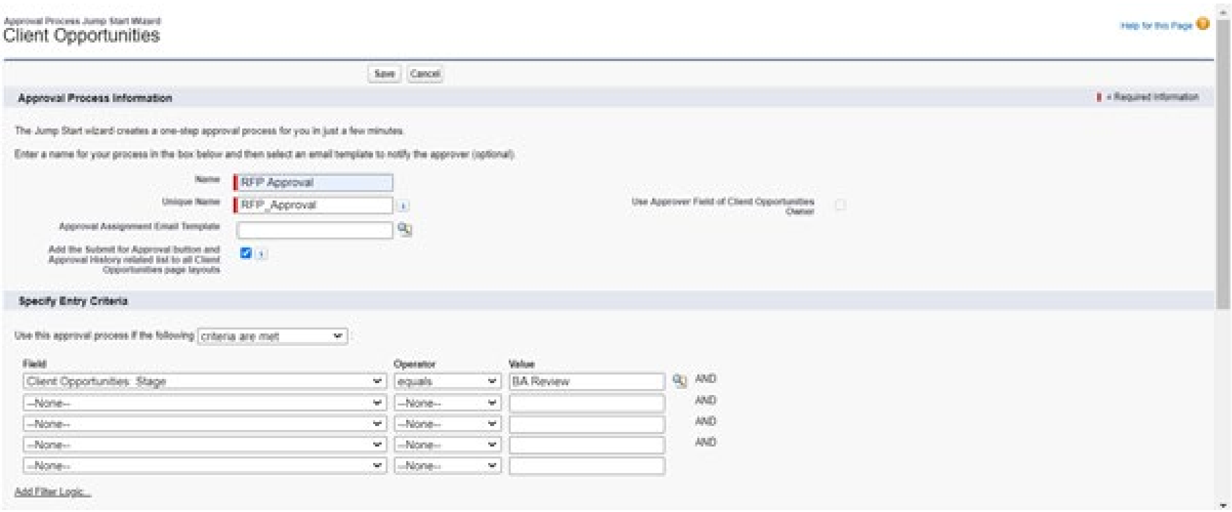
Edit | Back to Profile

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	✔	✔

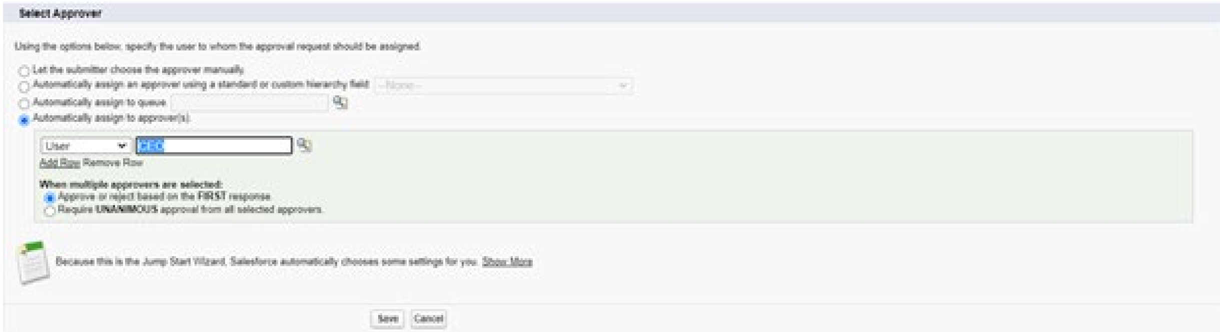
Edit | Back to Profile

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.

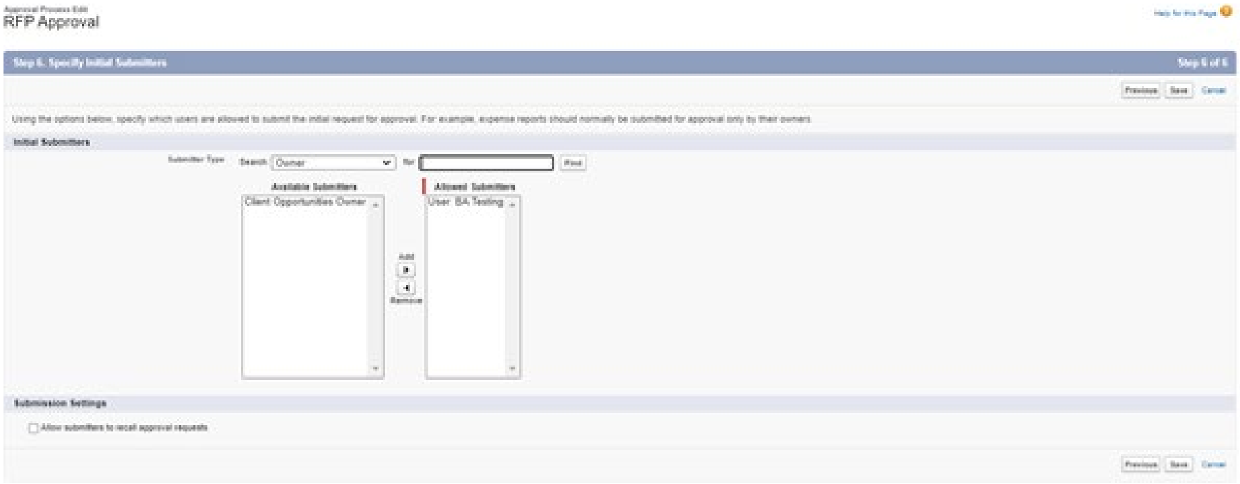


- Select the users (stakeholders) who want to approve the RFP.

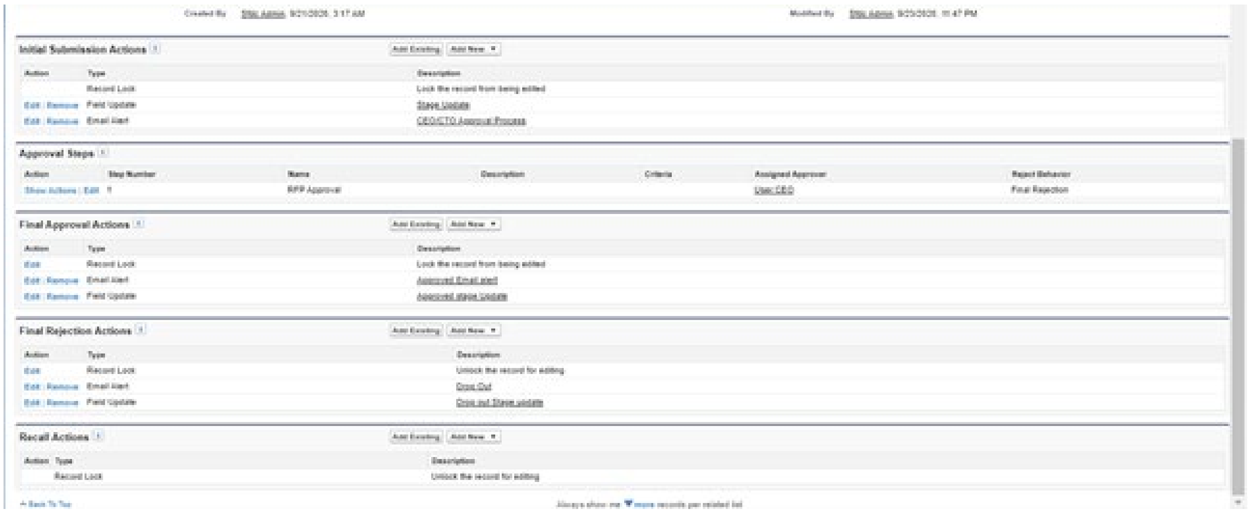


- Click Edit and select the approval page layout.

- Click Edit.
- Select the Initial Submitters.
- Select the stakeholders who want to submit for approval.

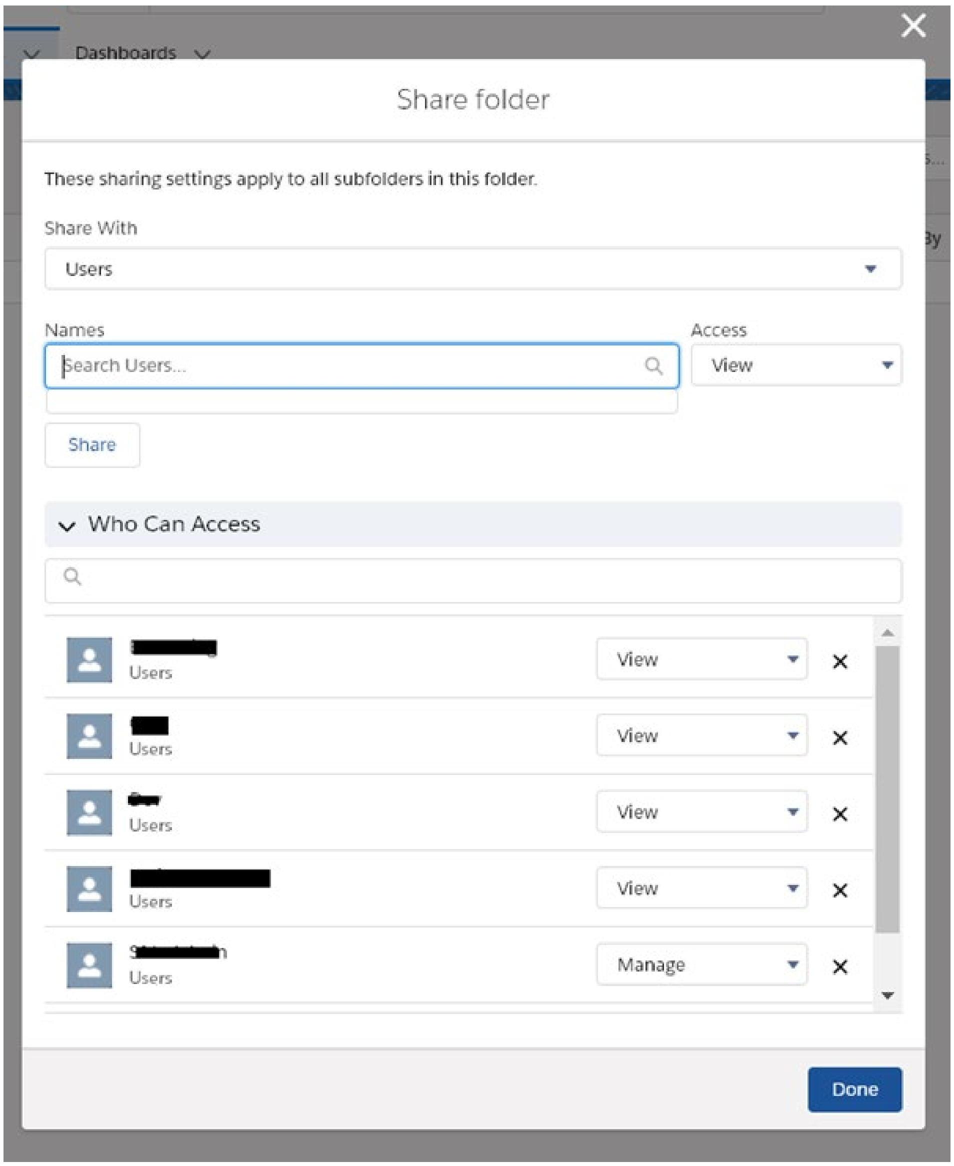


- Update the initial submission actions, approval steps, final approval actions, and final rejection actions.

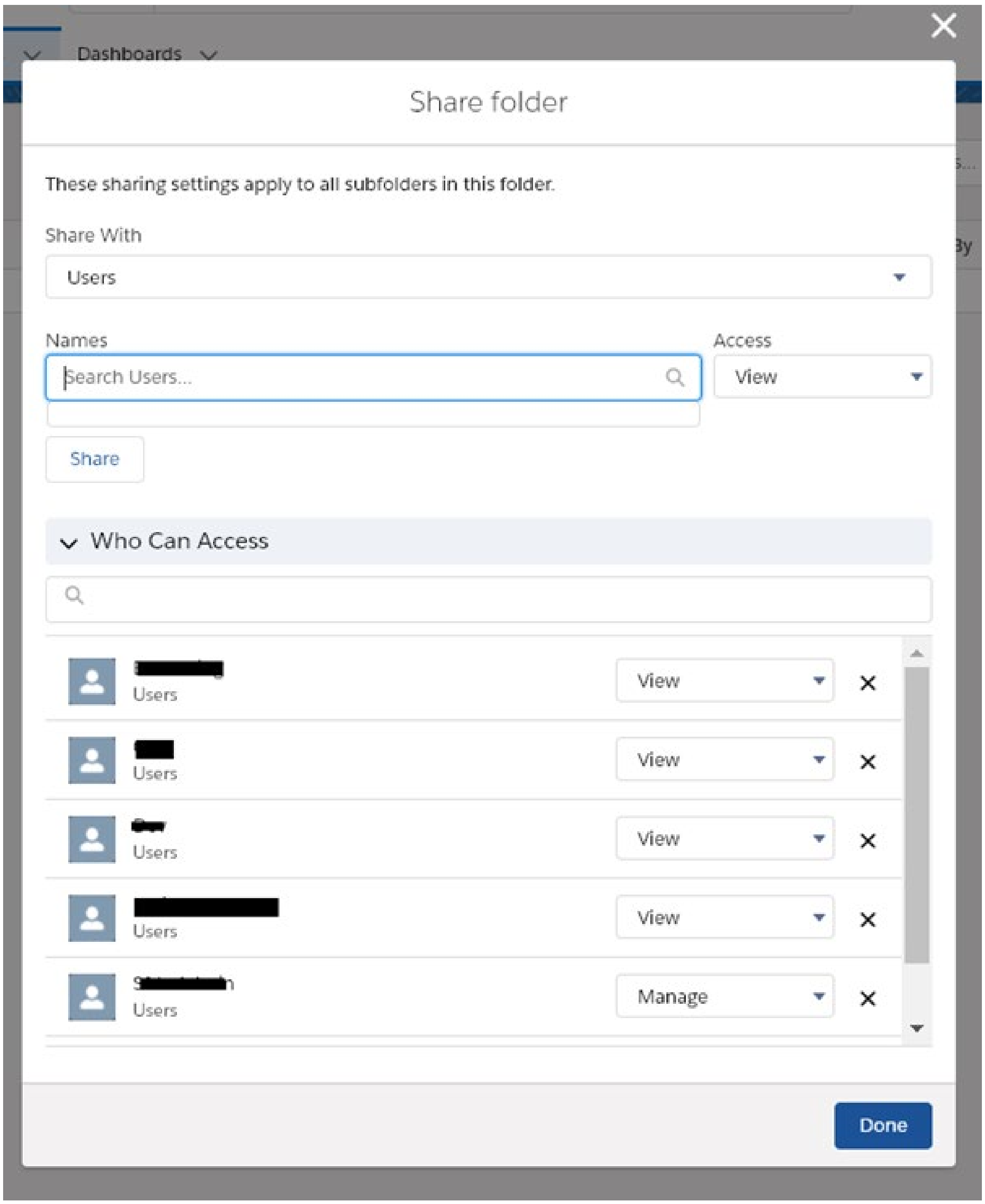


Sharing an RFP/RFI

- 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.



- 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.



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.

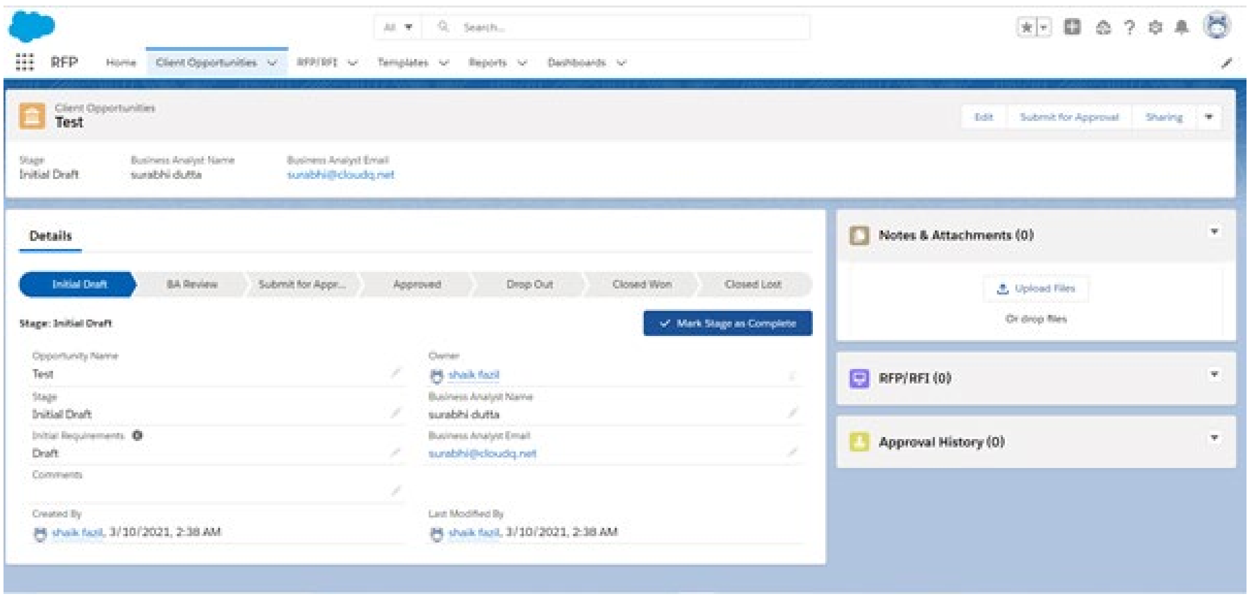
They're defined by QProposal, by default, as follows:

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

Workflow Walkthrough

1. Client Opportunity Pipeline

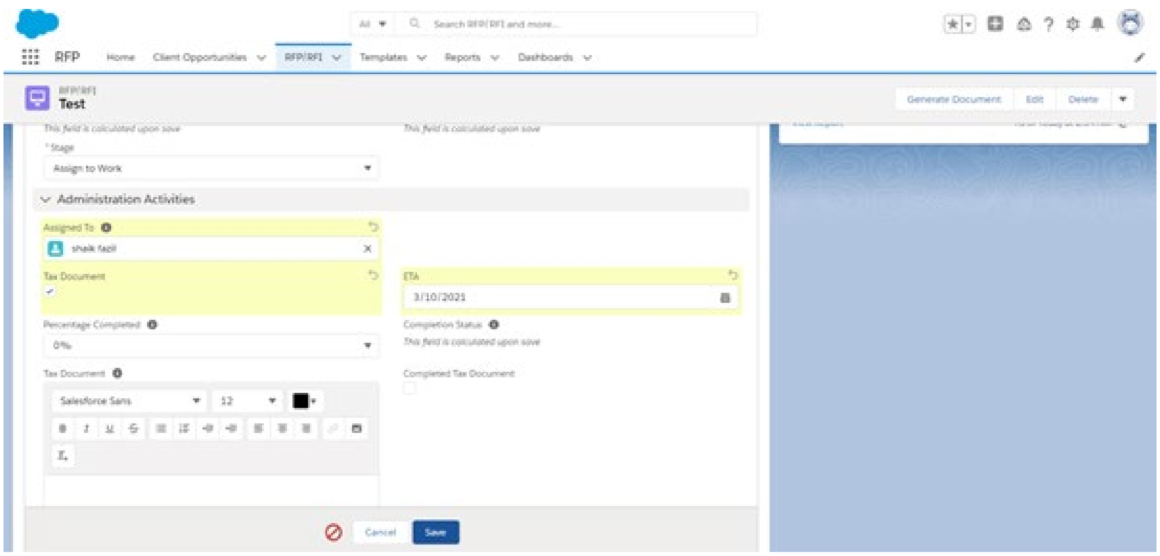
Your sales coordinator starts with an initial draft stage where they choose the parameters by which the RFP/RFI will be created. This will then be moved to the BA review stage. Your BA will review and send to the CTO for approval by clicking on the **submit for approval** button. This button only carries 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.

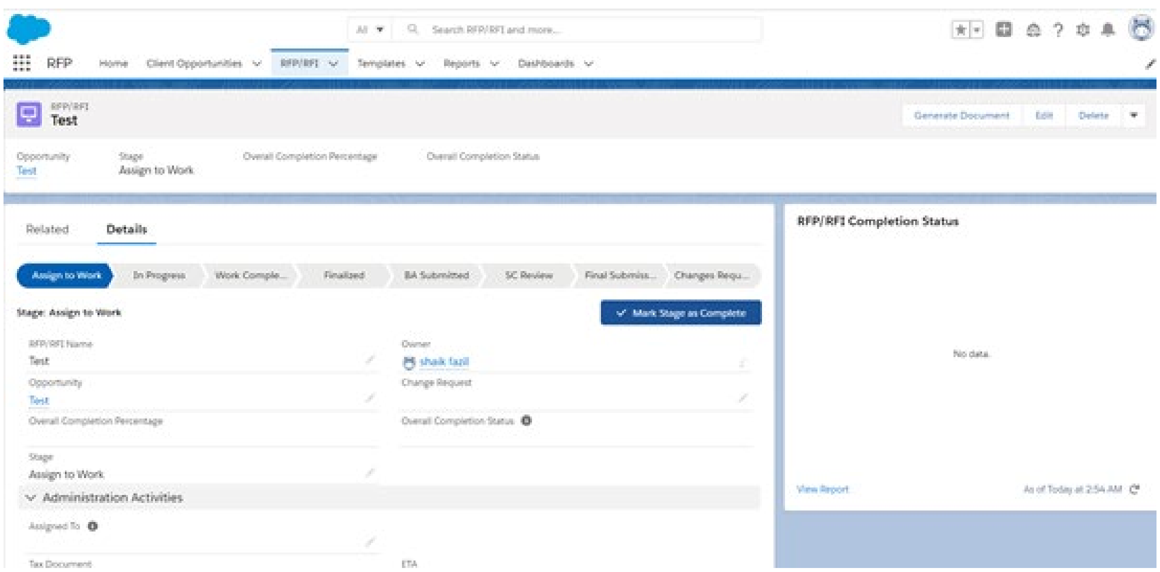


2. RFP Pipeline

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.





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

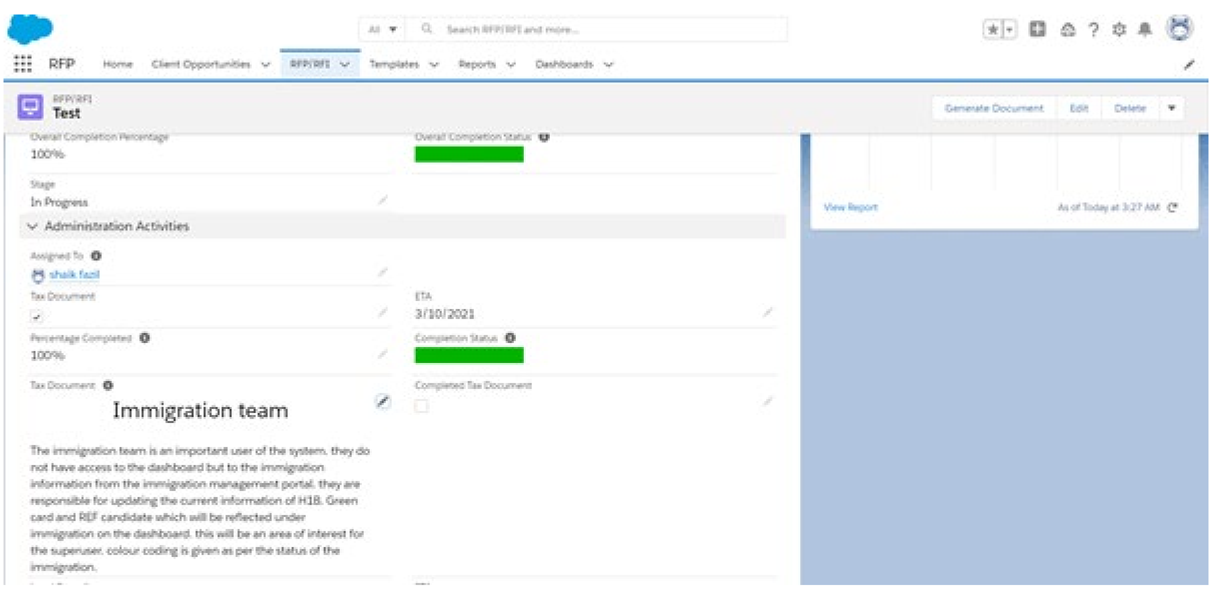
Stakeholder: PM
Permission sets can be made different for each stakeholder assigned, as per company hierarchy settings.

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.

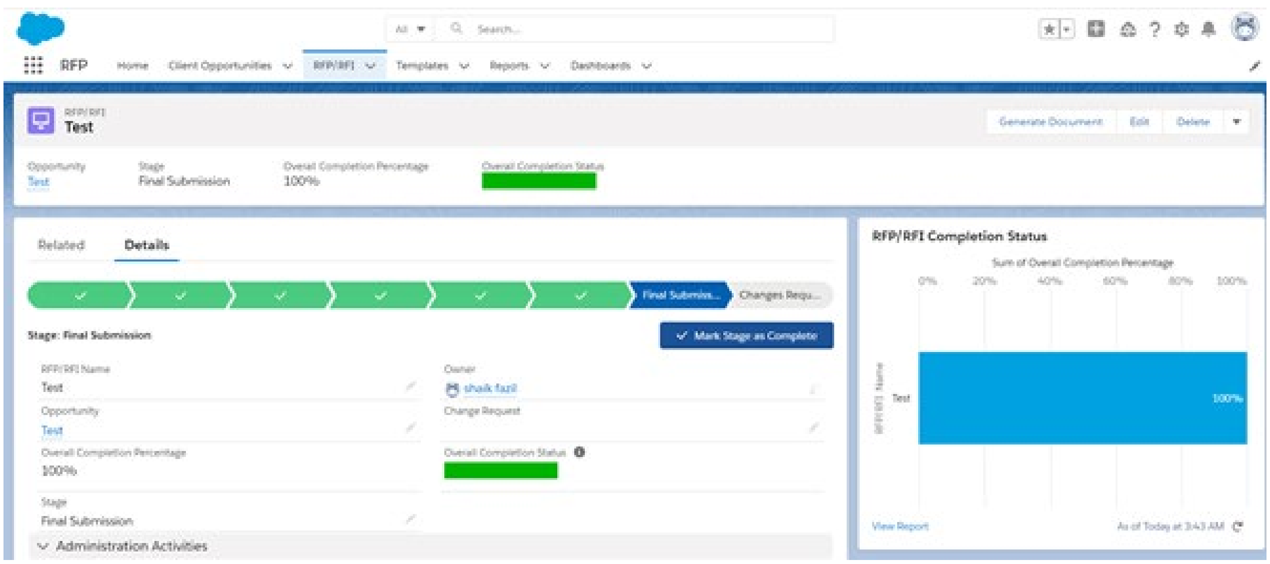


Finalized

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.

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