





Setting up Quote object and links in CRM On Demand

The process of setting up Quote object in CRM On Demand (COD) requires that your organization has Custom Objects 04-15 enabled. If they are currently not enabled, you will have to contact Oracle CRM On Demand support. You will also have to make sure that you have rights to define new reports and to work with Narrative Report View. This is also something that might have to be enabled by Oracle support.

Setting up Quote object

Select one of the unused Custom Objects 04-15 by going to Admin->Application Customization. Click on Customize Record Types and name the object as specified:

Custom Object 03	Custom Object 04	Custom Object 05	Custom Object 06		
Custom Object 04	Quote	Quotes	Quotes		 
Custom Object 05	Custom Object 05	Custom Objects 05	Custom Object 05		 

Go back to Application Customization and click on Quote object. Click on Quote Field Setup.

Add the following fields to Quote object:

- Quote Name
 - o Type : text(short)
- Quote Id
 - o Type: Integer
- Quote Owner Id
 - o Type: Integer
- Quote Primary
 - o Type: Checkbox
- Copy
 - o Type: Weblink
 - Web Link Target: Open in Custom Web Tab
 - Target Custom Web Tab: CPQ Quotes
 - Url:
`https://linktoyourcpqinstallation/Siebel/Backdoor.aspx?domain=yourcpqtenantname&username=%%%User id%%%&oppty=%%%Opportunity_Integration_Id%%%&action=Copy&QuoteId=%%%iQuote_Id%%%&OwnerId=%%%iQuote_Owner_Id%%%`
 - Replace linktoyourcpqinstallation with a valid URL to your CPQ (i.e. v6.webcomcpq.com); replace yourcpqtenantname with name of your tenant in CPQ
- Edit
 - o Type: Weblink
 - Web Link Target: Open in Custom Web Tab

- Target Custom Web Tab: CPQ Quotes
- Url:
https://linktoyourcpqinstallation/Siebel/Backdoor.aspx?domain=yourcpqtenantname&username=%%%User id%%%&oppty=%%%Opportunity_Integration_Id%%%&action=Edit&QuoteId=%%%iQuote_Id%%%&OwnerId=%%%iQuote_Owner_Id%%%
- Replace linktoyourcpqinstallation with a valid URL to your CPQ (i.e. v6.webcomcpq.com); replace yourcpqtenantname with name of your tenant in CPQ

Setting up Quotes Report

Click on Reports tab and select Design Analyses. Select Advanced Custom Objects from Reporting column to create a new report.

Add the fields from left side to report so it looks like this:

The screenshot shows the 'Build and View Analysis' interface with four steps: Step 1 (Define Criteria), Step 2 (Create Layout), Step 3 (Define Prompts (optional)), and Step 4 (Review). The 'Quotes Report' is selected, and the 'Preview Analysis' tab is active. The 'Columns' section shows a table with the following columns: Name, Created, Currency, Integration ID, Quote Primary, Opportunity: Id, Quote Id, Quote Owner Id, # of Quotes, Integration ID, and Opportunity ID. The 'Filters' section shows a filter for 'Opportunity ID is prompted'.

Quote				Quote Custom Attributes		Custom Number/Integer		Quote Metrics	Opportunity	
Name	Created	Currency	Integration ID	Quote Primary	Opportunity: Id	Quote Id	Quote Owner Id	# of Quotes	Integration ID	Opportunity ID

Filters: Open Saved Filter Save Filter...
 Add a filter by either clicking the New Filter button in the columns above or hold the Ctrl key while clicking a column in the selection pane.

Opportunity ID is prompted

Click on Step 2. Click on Add View and Add Narrative View from Advanced section. Click on little pen icon next to Narrative View to edit the view.

Add the following:

Prefix:

<html>

<head>

<meta http-equiv="content-type" content="text/html;charset=iso-8859-1">

<title>Untitled Page</title>

```
<style type="text/css" media="screen"><!--
```

```
body
```

```
{
```

```
    font-family: Tahoma, sans-serif;
```

```
    font-size: 8pt;
```

```
    color: #4D4D4D;
```

```
    font-weight: bold;
```

```
    line-height: 22px;
```

```
    background: #FFFFFF repeat-y center top;
```

```
    text-align: left;
```

```
//    margin: 10;
```

```
        center top
```

```
}
```

```
.rowformFieldTD
```

```
{
```

```
    padding: 1px 5px 1px 5px;
```

```
    font-family: Tahoma, sans-serif;
```

```
    font-size: 8pt;
```

```
    line-height: 11pt;
```

```
    border-bottom: 1px solid #B2C2DF;
```

```
        text-align: left;
```

```
}
```

```
.rowformFieldTD a:link,  
.rowformFieldTD a:visited,  
.rowformFieldTD a:hover  
{  
    text-decoration: none  
}
```

```
.headerTD  
{  
    padding: 1px 5px 1px 5px;  
    font-family: Tahoma, sans-serif;  
    font-size: 8pt;  
    line-height: 11pt;  
    background-color: rgb(248,235,215);  
    color: rgb(133,91,7);  
    text-align: left;  
}
```

```
.error  
{  
    font-family: Tahoma, sans-serif;  
    font-size: 8pt;  
    color: #FF0000;  
    font-weight: bold;
```

```
}
```

```
.tekstrood
```

```
{
```

```
    font-family: Tahoma, sans-serif;
```

```
    font-size: 8pt;
```

```
    color: #FF0000;
```

```
}
```

```
.tekstzwartbold
```

```
{
```

```
    font-family: Tahoma, sans-serif;
```

```
    font-size: 8pt;
```

```
    color: #4D4D4D;
```

```
    font-weight: bold;
```

```
}
```

```
.tekstgrijs
```

```
{
```

```
    font-family: Tahoma, sans-serif;
```

```
    font-size: 8pt;http://scoutingorion.com/DenB/webtab.php
```

```
    color: #4D4D4D;
```

```
    font-weight: normal;
```

```
}
```

```
.tekstzwart
{
    font-family: Tahoma, sans-serif;
    font-size: 8pt;
    color: #000000;
    font-weight: normal;
    text-align: left;
}
```

```
.tekstblauw
{
    font-family: Tahoma, sans-serif;
    font-size: 8pt;
    color: #003399;
    font-weight: normal;
    text-align: left;
}
```

```
.InputControl
{
    color: black;
    background-color: #FFFFFF;
    border: 1px solid #7f9db9;
    font-family: Tahoma, sans-serif;
    font-size: 8pt;
    width : 120;
}
```

```
.formSectionSeparator {  
    border-bottom: 3px solid rgb(248,235,215);  
    padding-left: 8px;  
    padding-top: 1px;  
}
```

```
.formSectionSeparatorText
```

```
{  
    font: bold 8pt tahoma;  
    color: rgb(131,88,9);  
}
```

```
.buttonTD
```

```
{  
    background-image: url(een.jpg);  
    border-color: rgb(0,102,153);  
    border: 1px solid rgb(0,102,153);  
    font-size: 8pt;  
  
    color: #4D4D4D;  
    padding: 1px 2px 1px 2px;  
}
```

```
.buttonTD a:link,
```

```
.buttonTD a:visited,
```

```
.buttonTD a:hover
```

```
{
```

```
font-family: Tahoma, sans-serif;
font: bold 8pt tahoma;
color: #4D4D4D;
text-decoration: none
}
```

```
--></style>
```

```
</head>
```

```
<body>
```

```
<table cellspacing=0 cellpadding=0 width="840">
```

```
<tr>
```

```
<th class=headerTD width="8%"></th>
```

```
<th class=headerTD width="8%"></th>
```

```
<th class=headerTD width="25%">Quote Name</th>
```

```
<th class=headerTD width="13%">Created</th>
```

```
<th class=headerTD width="13%">Is Primary</th>
```

```
</tr>
```

```
Narrative:
```

```
<tr>
```

```
<td class=rowformFieldTD><P CLASS=tekstblauw><a
href="javascript:parent.window.location='../CustomTab?Tab.Name=[CPQ+Quotes]&Tab.Object=Custom
Object4&Tab.Ctrl=WEBLINK_000&Tab.p0=@10&Tab.p1=@7&Tab.p2=@8'"
class="nclk">Edit</a></p></td>
```

```
<td class=rowformFieldTD><P CLASS=tekstblauw><a
href="javascript:parent.window.location='../CustomTab?Tab.Name=[CPQ+Quotes]&Tab.Object=Custom
```



```
Object4&Tab.Ctrl=WEBLINK_001&Tab.p0=@10&Tab.p1=@7&Tab.p2=@8"
class="nclk">Copy</a></p></td>
```

```
<td class=rowFormFieldTD><P CLASS=tekstz wart>@1</p></td>
```

```
<td class=rowFormFieldTD><P CLASS=tekstz wart>@2</p></td>
```

```
<td class=rowFormFieldTD><P CLASS=tekstz wart>@5</p></td>
```

```
</tr>
```

```
Postfix:
```

```
</table>
```

```
</body>
```

```
</html>
```

Note: Depending on order in which you added Edit and Copy web links to quote object, text in Narrative section for WEBLINK_000 and WEBLINK_001 might have to be flipped around.

Click on Finish and Name your report "Quotes Report".

Setting up Opportunity

Go to Admin->Application Customization->Opportunity->Opportunity Fields . Add two new fields:

- New Quote
 - o Type: Weblink
 - Web Link Target: Open in Custom Web Tab
 - Target Custom Web Tab: CPQ Quotes
 - Url:
https://linktoyourcpqinstallation/Siebel/Backdoor.aspx?domain=yourcpqtenant
name&username=%%%User id%%%
&oppty=%%%Integration_Id%%%&action=New
 - Replace linktoyourcpqinstallation with a valid URL to your CPQ (i.e.
v6.webcomcpq.com); replace yourcpqtenantname with name of your tenant in
CPQ

- Clone Primary
 - o Type: Weblink
 - Web Link Target: Open in Custom Web Tab
 - Target Custom Web Tab: CPQ Quotes
 - Url:


```
https://linktoyourcpqinstallation/Siebel/Backdoor.aspx?domain=yourcpqtenant
name&username=%%%User id%%%
&oppty=%%%Integration_Id%%%&action=ClonePrimary
```
 - Replace linktoyourcpqinstallation with a valid URL to your CPQ (i.e.
 v6.webcomcpq.com); replace yourcpqtenantname with name of your tenant in
 CPQ

Note: After creating a Weblink field, go back to Opportunity Field setup. Click Edit to Edit both of the newly created links. Note in your browsers URL where it says SS_CtrlName=WEBLINK_011 . Take a note of what WEBLINK_0nn corresponds to what web link. You will need this in next step.

Go back to Opportunity Application Customization. Click on Opportunity Web Applet. Add New web applet.

- Web Applet
 - o Name: Quotes
 - o Location: Detail Page
 - o Type: HTML
 - o Web Applet HTML:

```
<script type="text/javascript">
function getDocHeight(doc) {
var docHt = 0, sh, oh;
if (doc.height) docHt = doc.height;
else if (doc.body) {
if (doc.body.scrollHeight) docHt = sh = doc.body.scrollHeight;
if (doc.body.offsetHeight) docHt = oh = doc.body.offsetHeight;
if (sh && oh) docHt = Math.max(sh, oh);
}
return docHt;
```

```
}
```

```
function setIframeHeight(iframeName) {
```

```
var iframeWin = window.frames[iframeName];
```

```
var iframeEl = document.getElementById? document.getElementById(iframeName): document.all?  
document.all[iframeName]:
```

```
null;
```

```
if ( iframeEl && iframeWin ) {
```

```
iframeEl.style.height = "auto"; // helps resize (for some) if new doc shorter than previous
```

```
var docHt = getDocHeight(iframeWin.document);
```

```
// need to add to height to be sure it will all show
```

```
if (docHt) iframeEl.style.height = docHt + 10 + "px";
```

```
}
```

```
}
```

```
</script>
```

```
<head>
```

```
<style>
```

```
<!--
```

```
#g1 { position: relative; z-index: 3; top: -21px; left: 80px; width: 50px; height: 18px;}
```

```
#g2 { position: relative; z-index: 2; top: -18px; left: -7px;}
```

```
-->
```

```
</style>
```

```
</head>
```

```
<div id="g1">
```

```
<table class="ctb" cellspacing="0" cellpadding="0" width="100%">
<tr>
<td width="100">
    <div onkeypress="onButtonPress(this);" onmouseover="toggleNavButton(this);"
onmouseout="toggleNavButton(this);" class="buttonChildTitleBarTD" id="New Quote">
        &#160; <a
onclick="doNavigate('CustomTab?Tab.Name=%5BCPQ+Quotes%5D&Tab.Object=Opportunity&Tab.Ctrl=
WEBLINK_010&Tab.p0=%%%Integration_Id%%%',false,this,null);" class="nclk"
href="javascript:void&#40;0&#41;" style="color:#000000" style="text-decoration:none">New
Quote&#160;</a>
    </div>
</td>
<td width="1">&#160;</td>
<td width="100">
    <div onkeypress="onButtonPress(this);" onmouseover="toggleNavButton(this);"
onmouseout="toggleNavButton(this);" class="buttonChildTitleBarTD" id="Clone Primary">
        &#160; <a
onclick="doNavigate('CustomTab?Tab.Name=%5BCPQ+Quotes%5D&Tab.Object=Opportunity&Tab.Ctrl=
WEBLINK_011&Tab.p0=%%%Integration_Id%%%',false,this,null);" class="nclk"
href="javascript:void&#40;0&#41;" style="color:#000000" style="text-decoration:none">Clone
Primary&#160;</a>
    </div>
</td>
</tr>
</table>
</div>
<div id="g2">
```

```
<iframe name='DynamicHeightCR' id='DynamicHeightCR'  
onload="javascript:setIframeHeight(this.name);" src='https://secure-  
ausomxapa.crmondemand.com/OnDemand/user/analytics/saw.dll?Go&Path=%2fshared%2fCompany_3  
0103_Shared_Folder%2fQuotes+Report&Options=rfd&Action=Navigate&P0=1&P1=eq&P2=Opportunity.  
"Opportunity ID"&P3=%%%Id%%%' width='100%' frameborder='no' scrolling='no'></iframe>  
  
</div>
```

Click Save. Go To Opportunity Page Layout Customization. Edit the layout where you want to show Quotes and in Related Information section add Quotes web applet.