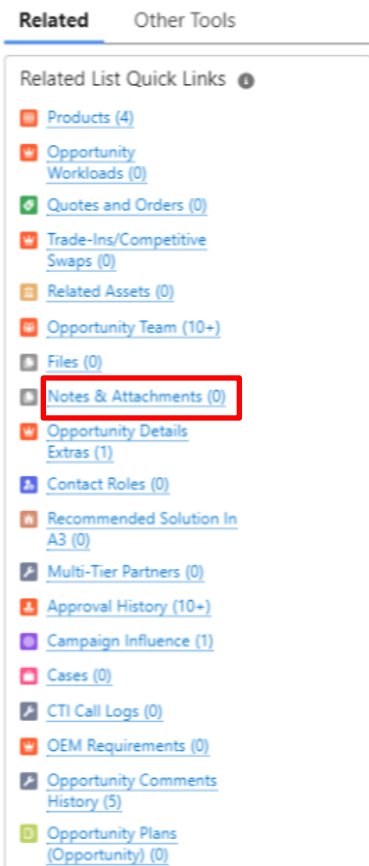


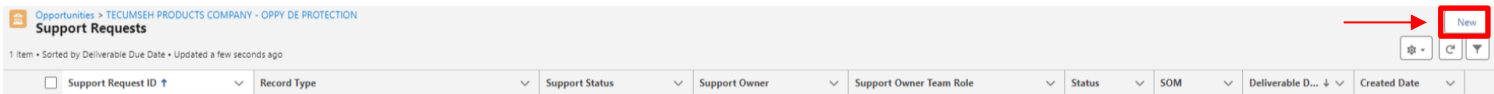
Global Instructions for Engaging a Proposal Manager / Large Deal Support

SFDC Lightning - For Classic SFDC instructions, visit page 3

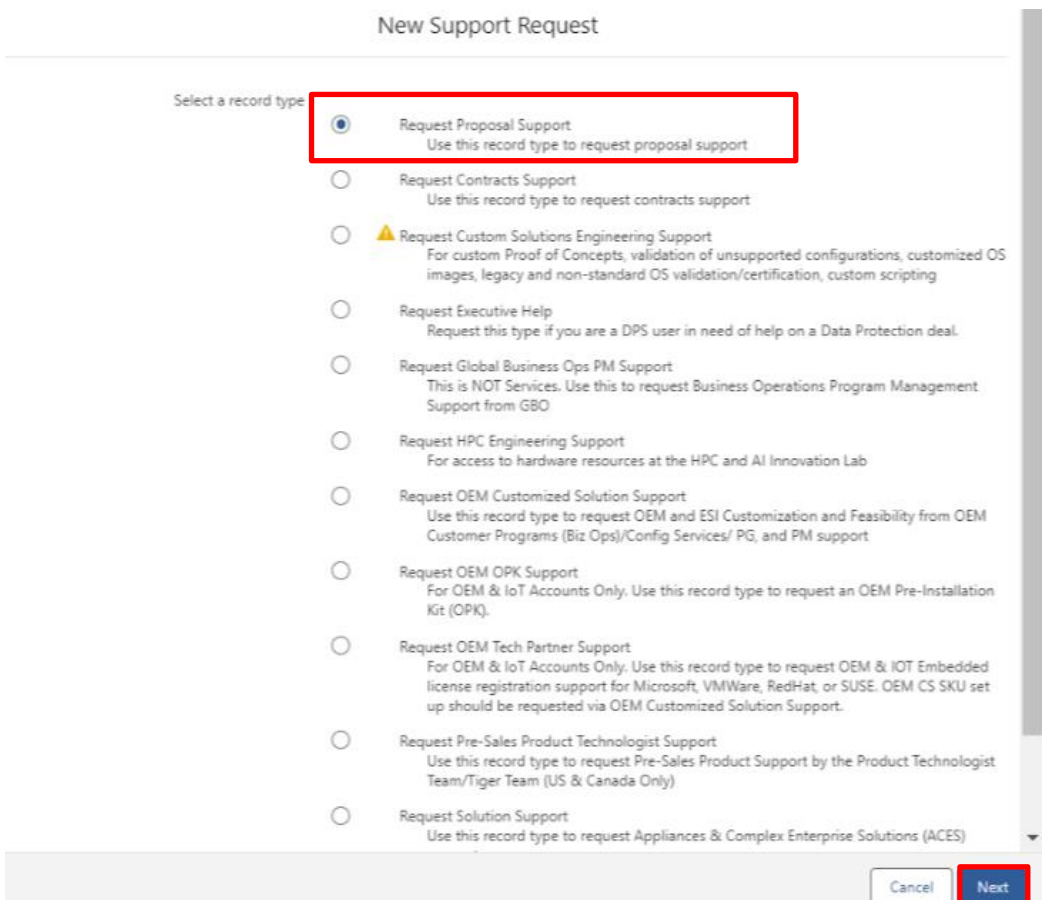
1. Create an SFDC (Salesforce) Opportunity or open an existing opportunity.
2. Within the SFDC Opportunity, go to the Related List Quick Links
3. Find the **Notes & Attachments Section** and attach all Customer RFP (Request for Proposal) or Large Deal documents (**Related List Quick Links -> Show All-> Notes & Attachments**).



4. Next, select **Support Requests** under the Related List Quick Links and click the New button in the top right-hand corner. (**Related List Quick Links -> Show All-> Support Request -> New**)



5. Under the **Support Request Record Type**, select "**Request Proposal Support**" then click **Continue**.



6. Fill out the 4 Fields Highlighted with in red below:
- a. Proposal Support (Select one: RFI / PQQ, RFP/ RFQ, or Other Proposal Support; For Large Deals, select Other Proposal Support)

b. Deliverable Due Date

c. Comments (Add any applicable comments)

d. Submission Deadline

e. Click Save

New Support Request: Request Proposal Support

* = Required Information

Support Request ID

* Proposal Support

--None--

a

Support Owner

Support Owner Team Role

* Deliverable Due Date

i

b

Support Status

Resource requested

Comments

i

c

Tender/Proposal Number

* Submission Deadline

i

d

Date of Issue

Multinational Opportunity

Date of Award

Global Program

--None--

* Opportunity

TECUMSEH PRODUCTS COMPANY - X

Utilization

i

Record Type

Request Proposal Support

Cancel

Save & New

Save

e

7. The **Regional Proposal Team** will review the request and get back to you within 24 Hours regarding your support options.

Notes:

- Please note that certain regions have different revenue thresholds for proposal manager support.
- The earlier the Proposal Team is engaged, the better!
- Support is for Dell Direct responses only and the Dell Channel Team articulates the value of Dell solutions through Partners.
- If there are Service Requirements (such as Installation), or other teams that need to be engaged such as Contracts, you must also enter an additional Support Request to engage those teams.
- RFX's that are supported are typically Formal Non-Standard Requests that include Risk Elements, SLAs, Terms and Conditions, Legal Review, and Signatures.
- **Large Deals: Engagement Leads solve large issues in the procurement process and proactively mitigate potential risks before they become critical, while helping to ensure a seamless booking experience.**
- **Support Request Field Clarifications:**
 - **RFP** is for Request for Proposal
 - **RFI** is for Request for Information
 - **RFQ** is for Request for Quote
 - **Other Proposal Support** is for all other options including Large Deals

Deliverable Due Date and **Submission Deadline** fields can be filled out with the date that the Proposal Response is due to the Customer unless the Customer provides a Question-and-Answer period in the RFP timeline. If the Customer does provide time for Suppliers to ask clarifying questions about the RFP, please use that deadline for the Deliverable Due Date field.

Global Instructions for Engaging a Proposal Manager / Large Deal Support (Classic SFDC)

1. Create an SFDC (Salesforce) Opportunity
2. Within the SFDC Opportunity, attach all Customer Request for Proposal documents and information to the **Notes**

& Attachments Section

3. Within the SFDC Opportunity, go to the **Support Request Section** and click **"New Support Request"**

Support Requests

New Support Request

4. Under the **Support Request Record Type**, select **"Request Proposal Support"** then click **Continue**

New Support Request

Select Support Request Record Type

Select a record type for the new support request. To skip this page in the future, change your record type settings on your personal setup page.

Select Support Request Record Type

Record Type of new recordRequest Proposal Support

ContinueCancel

5. Fill out the **4 Fields Highlighted in Red** below:

- a) Proposal Support (Select one: RFI / PQQ, RFP/ RFQ, or Other Proposal Support)
- b) Deliverable Due Date
- c) Submission Deadline
- d) Comments (Add any applicable comments)
- e) Click **Save**

Support Request Edit

SaveSave & NewCancel

Proposal Support--None--a

Deliverable Due Date7/12/2019b

Commentsd

Submission Deadline7/12/2019c

Multinational Opportunity

Global Program--None--

Utilization--None--

Support OwnerUser

Support Owner Team Role--None--

Support StatusResource requested

Tender/Proposal Number

Date of Issue7/12/2019

Date of Award7/12/2019

OpportunitySAMPLE OPP NAME

Record TypeRequest Proposal Support

eSaveSave & NewCancel

6. The **Regional Proposal Team** will review the request and get back to you within 24 Hours regarding your support options.

Notes:

- Please note that certain regions have different revenue thresholds for proposal manager support.

The earlier the Proposal Team is engaged, the better!

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Support Request Field Clarifications:

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