

<proposal request table>

<id>	<sender id>	<subject>
[unique ID is required for each proposal request row]*	[sender ID]	[subject of proposal request]*

</proposal request table>

Add custom values to the sheet tabs 2, 3, 4, 5, 6, 7 and 8 before adding data. Delete rows 3, 4 and 5 and sheet tabs 2, 3, 4, 5, 6, 7 and 8 before importing into M. Enter data in rows between <id> and </proposal request table>, delete any rows

Legend	
<text>	keyword indicating a template option
[text]	description of value
*	required field
**	may be required
	no indicator means optional field
...	many items allowed
Drop down controls	Provide a list of default values for these fields, custom fields previously defined in Newforma can also be used

<draft status>	<expected date>
[proposal request status, valid values are 'draft' or 'expected' if it has not been sent or received respectively]	[for an expected proposal request, date it is expected to be received]
Valid default values:	

Newforma Project Center after (including this documentation) in the spreadsheet	

<initiated by>

<contract>

[person who initiated the proposal request. Required to be a valid email address format or project team member name (you can use a fake email address if necessary and delete it later or create the contact first if an email address cannot be used).]

[Contract Number of the existing contract the proposal request is associated with. Should be a valid contract number defined in Newforma Project Center]

<received date>

<received from>

[date proposal request was received. If importing previously received proposal requests, this field is required]**	[required if there is a received date. Required to be in a valid email address format or project team member name (you can use a fake email address if necessary and delete it later or create the contact first if an email address cannot be used).]**

<received by>

<receive action>

[required if there is a received date, a list of email addresses delimited by a comma or semicolon that received the proposal request. Must be a valid email address format or project team member name (you can use a fake email address if necessary) and delete it later or create the contact first if an email address cannot be used).]**	[required if there is a received date. Text must match a receive action type in the project for the proposal requests. For example, 'Respond with Proposal' is the default action that is selected for proposal requests created in Newforma Project Center]**
	Valid default values:

<received via>

<receive remarks>

[method proposal request was received; required if there is a received date; must match a project transfer method]**

[receive remarks]

Valid default values:

<closing method>

<closed by>

[required for closed proposal requests; valid values are Closed, Responded, Sent.]**

[required for closed proposal requests; corresponds to From field for proposal requests closed as Responded or Sent. Required to be in a valid email address format or project team member name (you can use a fake email address if necessary and delete it later or create the contact first if an email address cannot be used).]**

Valid default values:

<closing date>

<closing action>

[required for closed proposal requests; date the proposal request was closed on]**

[required for closed proposal requests; text must match action type of the defined closing method for the proposal request.]**

<closing remarks>

<sent to>

[closing remarks]

[required if closing method is Sent or Responded. Required to be in a valid email address format or project team member name (you can use a fake email address if necessary and delete it later or create the contact first if an email address cannot be used).]**

...

<cop status>

<description>

[status of the associated change order proposal; text must match the keyword in the COP status list of the project.]*

[description of the proposal request]

Valid default values:

<internal notes>

<keywords>

[internal notes for the proposal request]

[a list of keywords, delimited by ';', must match keyword list for the project if user not allowed to edit keyword list]

...

<email log>

<supporting docs>

[a list of file paths of existing email messages in the project folder delimited by '*']

[a list of file paths from project folders delimited by '*']

...

...

<source descriptor>

<source primary key>

[data source, for internal use only, please leave blank]

[source primary key of the proposal request For internal use only, please leave blank]
