

# Oracle® Order Capture

## Implementation Guide

Release 11i

August 2000

**Part No. A86137-01**

This topic group provides general descriptions of the set up and configuration tasks required to implement the application successfully.

### Dependencies

Oracle Order Capture requires the following related products and components be installed and implemented:

- Oracle Accounts Receivable – for support of Taxes and Customer definitions
- Oracle Inventory – for Items and Reservations
- Oracle Bill of Materials – for the bills of materials associated with Items
- Oracle Configurator – for the configurator URL, if Oracle Configurator is used
- Oracle Order Management – for support of booking an order
- Oracle iPayment
- Oracle Advanced Pricing – for support of prices and discounts
- Oracle Service Contracts
- Oracle Contracts Core – for support of templates

### Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*

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- *Implementing CRM Applications*
- Oracle CRM Foundation Components *Concepts and Procedures*
- Oracle CRM Foundation *Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table.

#### ***Related Documentation***

<b>Document</b>	<b>Purpose</b>
Oracle Applications, Product Update Notes, Release 11i	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11i	Documents the Rapid Install installation process
Implementing CRM Applications	Contains post-installation information on various CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

## **Related Courseware**

The following Net Class is available on demand through Oracle University.

- 11i Overview of CRM Foundation, Course Description ID 8831.

## **Setting Up Oracle Order Capture**

### **Steps**

<b>Step Number</b>	<b>Required?</b>	<b>Oracle Order Capture Setup Step Description</b>	<b>Window Name(s)</b>
1	Yes	<a href="#">Set up Quote Status Transitions</a>	Quote Status Setup
2	Yes	<a href="#">Set up Lookup Codes</a>	Quick Codes
3	Yes	<a href="#">Setup Profile Options</a>	Personal Profile

### **Guidelines**

Mandatory profile options are marked with an asterisk on the table of Oracle Order Capture System Profile Options on page 7.

Mandatory lookup codes are marked with an asterisk on the table of Oracle Order Capture Lookup Codes on page 5.

The ASO: Configurator URL profile option is mandatory only if you want the Configurator feature.

The ASO: Quote Conversion Type profile option is mandatory if you use multiple currencies.

## Setting Up Quote Status and Quote Status Transitions

Use this procedure to perform the following tasks:

- Add new quote statuses
- Set up quote versioning
- Enable or disable existing quote statuses
- Set up the allowable status changes, or transitions, for each status

Quote status identifies how close a quote is to an order and determines whether a user can modify a quote and whether or not the application creates a new version if changes are made.

Oracle Order Capture is delivered with predefined quote statuses. You can define new quote statuses or modify the pre-defined statuses. Users need Quote Statuses to create quotes. See the online help for an explanation of Quote Status.

### Prerequisites

To perform these tasks, you must be logged in under the Order Capture Sales Manager responsibility.

### Steps

1. Navigate to the Quote Status Setup window.
2. If you want to add a new quote status, then:
  - a. In the Quote Statuses region, select a blank entry line or a line below which you wish to insert the new entry.  
Alternatively, click the **Add** icon on the toolbar. The Add icon is the button with a green plus (+) sign.
  - b. Enter the status code. This is the internal name and is not seen by the user.
  - c. Enter the status name and status description. These are displayed in the list of values for users.

- d. If you want the new status to create a version when the user saves a quote, then check the **Auto Versioning** check box.
  - e. If you wish to enable a user to make changes to the quote, to add new quote lines or to modify prices, for instance, then check the **Update Allowed** check box.
  - f. If you wish to set time limits when this new status is available, then enter dates in the Effective From and Effective To fields.
  - g. Click **Save** on the toolbar.
- 3. If you wish to set up the rules that determine the permitted statuses a user can select for a particular status, then:
  - a. In the Quote Statuses region, select the status you wish to set up.
  - b. In the Allowed Transition to Status region, use the Code list of values to select an allowable transition status.
  - c. Repeat the previous step for each permitted transition status.
  - d. If you wish to disable an existing status, then uncheck the **Enabled** box.
  - e. Click **Save** on the toolbar.

## Setting Up Lookup Codes

Use the following list to identify the lookup codes (QuickCodes) that you need to define for your specific implementation. You can enter them in any order.

To set lookup codes, use the standard procedure outlined in the *Oracle Applications Users Guide*

### **Oracle Order Capture Lookup Codes**

<b>Lookup Code</b>	<b>Description</b>
ASO_CONTACT_PROFILE_TYPE	Types of customers. The two seeded values are: Consumer and Business.
*ASO_DEFAULT_ORDER_STATE	The default state of an order when the quote is passed to Oracle Order Management. The seeded values are: entered and booked. Each triggers different Oracle Order Management validation.
*ASO_HEADER_RELATIONSHIP_TYPE	Type of header relationships between quote headers. There is one seeded value: Copy. This lookup is used by an Order Capture API for validation of RELATIONSHIP_TYPE in ASO_QUOTE_HEADER_RELATIONSHIPS.
*ASO_ITEM_TYPE	Item types for items which are added to the cart.
*ASO_LINE_ATTRIBUTE_STATUS	Status of an order line attribute. This lookup is used by an Order Capture API for validation of STATUS in ASO_LINE_ATTRIBS_EXT.
*ASO_LINE_ATTRIBUTE_TYPE	Type of line attribute. This lookup is used by an Order Capture API for validation in ASO_LINE_ATTRIBS_EXT.
*ASO_LINE_RELATIONSHIP_TYPE	Type of line relationship. This lookup is used by an Order Capture API for validation of RELATIONSHIP_TYPE in ASO_QUOTE_LINE_RELATIONSHIPS.
*ASO_OBJECT_RELATIONSHIP_TYPE	Type of object relationship. This lookup is used by an Order Capture API for validation of RELATIONSHIP_TYPE in ASO_QUOTE_OBJECT_RELATIONSHIPS.
ASO_ORDER_FEEDBACK_CRM_APPS	CRM applications registered for order feedback. All applications listed here are informed of any changes to an order in Oracle Order Management.
ASO_ORDER_LINE_STATUSES	Status of the order line.
ASO_ORDER_STATUSES	Order status.
ASO_PARTY_RELATIONSHIP_TYPE	Not in use in the current release.
*ASO_PAYMENT_OPTION	Payment options available to users.
*ASO_PAYMENT_TYPE	Payment types available to users.

\* Lookup codes marked with an asterisk (\*) are mandatory

### **Oracle Order Capture Lookup Codes**

<b>Lookup Code</b>	<b>Description</b>
*ASO_QUOTE_OBJECT_TYPE	Type of quote objects. This lookup is used for validating OBJECT_TYPE in ASO_QUOTE_OBJECT_RELATIONSHIPS.
*ASO_QUOTE_SOURCE	The source of the quote.
*ASO_RELATED_OBJECT_TYPE	Type of object related to the quote. This lookup is used for validating RELATED_OBJECT in ASO_QUOTE_OBJECT_RELATIONSHIPS.
ASO_RESERVATION_TYPE	Options the user can use to decide at what level the application reserves an item in inventory.
*ASO_RETURN_FOR	Reasons for returns.
*ASO_SERVICE_TYPE	Service reference type code. A service must always be linked to an item or an item in the customer installed base. This list of values specifies where the item is. Seeded values include: Quote, Order, and Customer Product.
ASO_UNIVERSAL_SEARCH	Types of universal search. Not used in Release 11i.

\* Lookup codes marked with an asterisk (\*) are mandatory

## **Setting System Profile Options**

Use the following list to identify the profile options that you need to set for your specific implementation. You can set these profile options in any order you like.

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

### **Oracle Order Capture System Profile Options**

<b>Profile Option</b>	<b>Description</b>
ASO: Advanced Inbound Installation	Determines if Oracle Advanced Inbound is installed. Not applicable in Release 11i.
ASO: Advanced Outbound Installation	Determines if Oracle Advanced Outbound is installed. Not applicable in Release 11i.
ASO: Automatic ATP Check	Determines whether ATP check is performed automatically for an item in the Item View tab.
ASO: Automatic ATP check for Number of Items	Specifies the number of items in the Related Items window that triggers an automatic ATP check. Users can use this profile to limit the amount of time the application spends performing ATP checks. If the number of related items is less than or equal to the specified number, then the application performs an ATP check. If the number of related items is equal to the specified number, then the application does not perform the check.
ASO: Automatic Numbering	<p>Determines if the application automatically generates a quote number. If this profile option is set to null, then the automatic numbering is turned off and the user has to enter the quote number.</p> <p>By default, this option is set to Yes and cannot be changed in the current release.</p>
ASO: Configurator URL	Enter the URL for the Oracle Configurator window.
ASO: Credit Card Authorization	A flag determining whether the application performs a credit card authorization.
*ASO: Default Currency Code	<p>One of the two profile options that determine the currency of the transactions in the application.</p> <p>The currency defined in ASO: Default Order Type takes precedence over this profile option.</p>
*ASO: Default Order Category	Determines whether all items in an order are orders or returns. By default, this profile is set to orders and cannot be changed in the current release.
*ASO: Default Order State	The default state of the order when the quote is booked. Determines whether or not quote can be booked or entered.

**\* Profile options marked with an asterisk (\*) are mandatory.**

### **Oracle Order Capture System Profile Options**

<b>Profile Option</b>	<b>Description</b>
*ASO: Default Order Type	Determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile determines what price list and currency code appears by default in the main Order Capture form.
ASO: Default Ordered Qty in OC UI	The default quantity which appears in the QTY field of the Order Capture window.
ASO: Default Payment Option	Defaults the payment option. Choices are: single, installment, and split.
*ASO: Default Person ID	The default sales representative who is allocated the sales credits for booked orders when the user is not entered as a sales representative.
ASO: Default QTY for ATP Check	This profile option is not in use.
*ASO: Default Quote Status	Default status of a new quote. When this option is not defined, the default value is Draft.
ASO: Enable Configure Model Item	Enables configuration of model items. This profile option is not being used in Release 11i. In this release, the configurator is enabled by setting the Configurator URL.
ASO: Enable Line Payments	Not used in this release.
ASO: Enable Split Payment	Not used in this release.
ASO: Order Feedback Queue Retention Time	Amount of time that messages are retained in the order feedback queue.
ASO: PAYMENT_TERM	Not used in this release.
*ASO: Product Organization	The organization that Order Capture uses to validate inventory items.
ASO: Quote Conversion Type	Conversion type for getting daily conversion rate. Not used in this release.
*ASO: Quote Duration	The length of time a quote remains valid.
ASO: Quote Order Entered State	The state of orders when they are created from quotes. Not used in this release.
ASO: Quote Order Type	This profile option is not in use.

**\* Profile options marked with an asterisk (\*) are mandatory.**



### **Oracle Order Capture System Profile Options**

<b>Profile Option</b>	<b>Description</b>
ASO: Receipt Method	Determines the receipt method for credit card authorization. This profile option is required when ASO: Credit Card Authorization is set to Yes.
ASO: Reservation Level	Determines the level at which item reservation is done. Items can be reserved either when they are added to the cart or when the order is booked. Manual reservation is not supported in Release 11i.
ASO: Scripting Installation	Determines if Oracle Scripting is installed. Not used in Release 11i.
ASO: Transaction Source Type	<p>The source type used for reserving items.</p> <p>There must be at least one Transaction Source Type. The source type is set up by Manufacturing &amp; Distribution Manager responsibility in Inventory &gt; Setup &gt; Transaction Source Type.</p> <p>Attach this Transaction Source Type to the profile option ASO: Transaction Source Type</p>
ASO: Use Installation Details	Turns on the Installation Details UI. Not used in Release 11i.
ASO: Use Product Configurator	Not used in Release 11i.
*ASO: Validate Salesrep	<p>If this profile is set to Yes, then it checks to see the user is set up as a valid sales representative.</p> <p>If it is set to No, then the application uses the default sales representative entered in ASO: Default Person ID.</p>

**\* Profile options marked with an asterisk (\*) are mandatory.**

### **Workflows in Oracle Order Capture**

Oracle Order Capture does not use workflows.

