

# Oracle® Order Capture

Concepts and Procedures

Release 11i

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## **Oracle Order Capture Concepts and Procedures, Release 11i**

### **Part No. A86136-03**

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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If you have problems with the software, please contact your local Oracle Support Services.



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# Preface

*Oracle Order Capture Concepts and Procedures* provides information and instructions to help you use Oracle Order Capture 11i effectively.

## Intended Audience

This manual is intended for the following users:

- Sales representatives accessing Order Capture from Oracle TeleSales
- Support representatives accessing Order Capture from Oracle Customer Care
- Sales representatives from Oracle iStore

## Related Documents

For more information consult the following documentation, available at <http://metalink.oracle.com>:

*Oracle Order Capture Implementation Guide, Release 11i*

*Oracle Applications Flexfield Guide*

*Oracle Applications User's Guide*

*Oracle Applications System Administrator's Guide*

*Oracle iPayment Concepts and Procedures*

*Oracle Receivables Users Guide Release 11i*

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The following typographic conventions are used in this manual:

<b>Convention</b>	<b>Meaning</b>
<i>italic text</i>	Book titles
Courier text	User commands and file content examples
UPPERCASE	Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables
<b>boldface text</b>	Menu, button, keyboard, and form options Emphasized words or phrases
< >	Angle brackets enclose user-supplied names. Note: Do not type the angle brackets.

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# Understanding Oracle Order Capture

## 1.1 Overview of Understanding Oracle Order Capture

Oracle Order Capture serves as the integration point between a selection of Oracle's CRM applications and Oracle's Order Management system. You can use Order Capture to create quotes based on information from Oracle TeleSales 11*i*, Oracle Customer Care 11*i*, and iStore 11*i*. Once a customer accepts a quote, you can use Order Capture to translate the quote into an order.

This topic group provides overviews of the application and its components, and explanations of key concepts, features, functions, and the application's relationships to other Oracle or third-party applications.

- [Relationship of Order Capture to Other Oracle Applications](#)
- [Understanding the Order Capture Form](#)
- [Customers Types](#)
- [Understanding Quotes](#)
- [Understanding Quote Status](#)
- [Understanding Orders](#)
- [Item Types](#)
- [Related Items: Cross-Sell, Upsell, and Substitute](#)
- [How Items are Priced and Discounted](#)
- [Understanding the List of Values \(LOV\) Fields](#)
- [Understanding the Item and Price List LOVs](#)

## 1.2 Relationship of Order Capture to Other Oracle Applications

Order Capture integrates with a number of Oracle's CRM applications. These applications use Order Capture to create quotes and orders. While some of them adopt the Order Capture user interface (UI), others simply use API and database information.

One aspect the following examples have in common is the use of the Trading Community Architecture (TCA) Model 11i. The TCA model stores customer information such as name, address, contacts, past billing information, past shipping information, and past payment information. The TCA model allows applications to access consistent information on all business entities. The data is available across all channels - phone, web, or in person - and as a result the customer information available to representatives across applications is accurate and consistent.

There are three main Oracle applications that Order Capture integrates with:

- Oracle TeleSales
- Oracle Customer Care
- Oracle iStore

Following are business scenarios illustrating how these three applications use Order Capture to create quotes and orders.

### 1.2.1 Order Capture and Oracle TeleSales

Oracle TeleSales is a call center-enabled application designed for internal sales representatives, distributors, resellers, and sales executives. With TeleSales they can track, manage, and execute sales in the customer sales cycle. Oracle TeleSales exploits Order Capture quoting and order submission functionality as part of this process. For example, if a customer contacts a sales organization by telephone, the Sales Representative can access the TeleSales application to generate the lead, qualify the prospects, access existing customer information and submit a quote.

To process information during each of the sales cycle phases, the Sales Representative accesses TeleSales' eBusiness Center. The Sales Representative can click the Leads tab when processing information on a lead. He/she can also click the Opportunity tab when processing information on an opportunity.

When a Sales Representative is working with a customer who is interested in adding items to a quote, he clicks the Quote/Order tab. The Quote/Order page is displayed in the lower region of the screen. Here, he/she can view all the quotes for the customer by clicking Quotes from the View, pull-down menu. A list of quotes

for the customer displays. To view details of a selected quote, select the quote and click the **Detail** button. The Order Capture form for that selected quote is displayed.

To view a customer's orders, select Order from the View, pull-down menu. A list of the customer's orders displays. To view a particular order, select an order and click the **Detail** button. You will access the Order Management form for that order.

On the other hand, if the Sales Representatives finds out that creating a new quote is required, he/she can click the **New** button.

Once the **Detail** or **New** button is clicked, the Order Capture form displays. The TeleSales end user can then continue to use the Order Capture form to:

- Initiate new quotes
- Modify an existing quote that has not been submitted as an order
- Configure and select products in the quote
- Check on availability
- Provide price adjustment information
- Provide promotional information
- Document billing, shipping, and payment information
- Submit the order and provide an order number

## 1.2.2 Order Capture and Customer Care

Oracle Customer Care is used to track customer interactions and services after a quote is submitted. When a customer call requires help with a product they ordered, the customer sometimes discovers they need to order an additional item. The Customer Care representative can access the Order Capture form from Customer Care's Quick Menu and prepare a quote.

For example, Jim Johnson from Business World bought some Envoy Laptop computers. He now needs some cables. Mary Lee, a Customer Care representative, receives a call from Jim at Business World requesting five cables.

Mary accesses the main Customer Care interface — the Contact Center. From the toolbar she chooses **Tools > Quick Menu**. Mary then clicks Order Capture. The Order Capture form displays. Mary starts a new quote for Business World that includes the five cables.

### 1.2.3 Order Capture and iStore

Customers can place orders over the Internet as well as through a TeleSales or Customer Care Representative. When a customer visits a website created by Oracle iStore, Order Capture APIs are used to save shopping carts and to submit orders.

Order Capture APIs are used to view and modify shopping carts from iStore. Order Capture APIs are also used to submit orders to Order Management. iStore and Order Capture applications get customer information from the TCA schema.

For example, Jim Johnson from Business World visits Vision Corporation's website. Jim places 10 mouse pads in the shopping cart. The phone rings and Jim leaves his cart on-line. Later Jim returns to the Vision Corporation website and adds five standard desktop computers to his cart. Jim's boss enters the office with a customer problem Jim has to solve. Jim leaves the website again.

Jim leaves for an out of town business trip. He does not have access to a computer. He needs to add three printers to his cart, so Jim calls Vision Corporation.

Jim reaches a TeleSales Representative. Jim provides the shopping cart name. The TeleSales Representative accesses the shopping cart name through Quote/Order tab in the e-Business Center. Since Jim and Business World have done business with Vision Corporation before, the customer information is available. The TeleSales Representative updates his cart/quote.

#### Summary

- Products can be placed in the shopping cart in iStore, saved, and the cart can be accessed again, using Order Capture.
- The shopping cart can be retrieved and modified in Order Capture using the customer name and the shopping cart name.
- Any changes made in Order Capture can then be viewed by the customer in iStore. The customer can subsequently place the order in iStore.
- Due to the integration between Order Capture, TeleSales, and Customer Care applications, the iStore shopping cart can be viewed and modified by the end users of TeleSales and Customer Care.

## 1.3 Understanding the Order Capture Form

The Order Capture form is divided into the following regions:

- [Header Information Region](#)

- [Item View](#)
- [Shopping Cart View Tab](#)
- [The Bill To Tab](#)
- [The Ship To Tab](#)
- [The Payment Tab](#)
- [The Quote Total Region](#)
- [Save Quote and Book Order Buttons](#)

See also:

- [Understanding the Order Capture Form](#)
- [Understanding Quotes](#)
- [Understanding Quote Status](#)
- [Understanding Orders](#)
- [Item Types](#)
- [How Items are Priced and Discounted](#)
- [Related Items: Cross-Sell, Upsell, and Substitute](#)

### 1.3.1 Header Information Region

The Header Information Region header information region displays:

- Basic information about the customer who is placing the order. This information comes primarily from calling applications. Oracle TeleSales provides customer information based on an opportunity. Customer Care provides customer information based on a customer interaction. Oracle iStore provides customer information based on the details a customer enters when registering with iStore.
- Quote information, such as the quote number, version, and status. A quote is created when you add items to the shopping cart and save your selections.

### 1.3.2 Item View

Use this tab to perform the following tasks:

- Select basic information and view prices of items your customer may be interested in purchasing. See [Using Oracle Order Capture](#) for details.

- View the availability of an item by checking the Available Qty field. (This functionality is available only if your administrator has enabled it in Order Capture.)
- View and modify the quantity of an item.
- View the price of an item and modify it by changing your price list selection. See [Using Oracle Order Capture](#) for details.
- Add items to the shopping cart.

The first line of the Item View tab contains the Current Item field, the Items in Shopping Cart field, and buttons that you can use to display the next, previous, first, or last items in the shopping cart. This line shows the following information:

- If the item displayed in the Item View tab has been added to the shopping cart
- How many items are in the shopping cart or quote

The Current Item field indicates the position of an item in the cart or quote. If the Current Item field is blank, then the item has not been added to the cart.

The Items in Shopping Cart field shows the total number of items in the quote or cart. A blank Items in Shopping Cart field means the shopping cart is empty.

If the Current Item field is blank and:

1. If the Item View tab displays an item, the item has not been added to the shopping cart or quote. Click **Add to Cart** to add this item to the cart, or click **Clear** to clear the item from the Item View tab.
2. If the Item View tab does not display an item, you can enter a new item.

If both the Current Item field and the Items in Shopping Cart field have numbers, you are viewing an item that has been added to the shopping cart and is a line item in the quote. You can modify this item or click **Remove** to remove it from the cart or quote. You can also use the arrow buttons on the panel to navigate to other items in the cart.

Use the following arrow buttons to scroll through the items in a quote and to create a new item in the quote:

- Use the **right arrow** button to advance to the next item in the quote. If you are viewing the last item in the quote, clicking this button creates a new item in the cart.
- Use the **left arrow** button to go to the previous item in the cart.
- Use the **double right arrow** button to go to the last item in the quote.

- Use the **double left arrow** button to go to the first item in the quote.

You can also view information about any substitute, upsell, or cross-sell items linked to the item by clicking the **Related Items** button. This button is disabled if there are no related items.

You can view included warranty information for the item displayed by clicking the **View Warranty** button, which is enabled only if the item is serviceable. Included warranties are included in the purchase price of the item and will not show up as separate line items in the quote. Service items, such as extended warranties, can also be purchased separately.

To select an item in inventory that is not yet in the cart, first ready the cart using one of the following methods:

- Click on the button with the green plus sign (**New**) in the toolbar.
- Select **File > New**.
- Click the next item button in the Item View tab while viewing the last item in the quote.
- Use the down arrow key to scroll to the last item in the quote.

### 1.3.3 Shopping Cart View Tab

The Shopping Cart View tab lists the contents of your shopping cart or the quote you have created. You cannot make any changes here. You must go to the Item View tab to view item details and modify the contents of the shopping cart.

### 1.3.4 The Bill To Tab

The Bill To tab displays the billing address and contact for the order as a whole.

You must enter a billing address before you can save the quote or place the order.

Check the Ship to Same Address box if the items should be shipped to the billing address.

#### **Address Detail form**

Click the oval button next to the address fields in the Bill to Address and Ship to Address tabs to view the Address Detail form. Clicking the oval button in the Bill to Address tab opens the Address Detail (Invoice To) form, while clicking the oval button in the Ship to Address tab opens the Address Detail (Ship To) form. Use this form to display billing and shipping address details.

### 1.3.5 The Ship To Tab

The Ship To tab displays the shipping contact and address for the order as a whole.

If you do not enter any values here, Oracle Order Management will use the billing address as the shipping address when it receives the order from Oracle Order Capture.

### 1.3.6 The Payment Tab

The Payment tab allows you to enter payment information for the order.

If you do not enter information into a Payment view field, Oracle Order Management will enter default payment information, based on the OM defaulting rules, once it receives the order from Oracle Order Capture.

If you enter information into a Payment view field, you must also enter all required payment information before you can submit the order. Required fields are yellow, optional fields are white, and fields where you should not enter information are gray, except for the drop-down lists.

To enter payment information specific to a payment type, you must first select a value from the Payment Type field.

Customers can pay for an order by:

- Cash
- Check
- Credit card
- Purchase order

If the customer is paying by credit card, Oracle iPayment will fill in the Approval Code field once the order is submitted.

### 1.3.7 The Quote Total Region

The Quote Total region shows the total quote price. This includes discounts, taxes, and shipping. Note that the tax and shipping amounts are estimates only. To obtain exact shipment and tax amounts for an order, you must use Oracle Order Management after you place the order.

All fields are read-only. You cannot make any adjustments here.

### 1.3.8 Save Quote and Book Order Buttons

You can create a quote when a customer is not ready to make a purchase or to present a customer with different pricing scenarios. The **Save Quote** button saves all the latest changes that were made since the last time the quote was saved.

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**Note:** If an item is displayed in the Item View tab but not added to the quote, a message window appears prompting the user to continue without adding the item to the quote.

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**Book Order** places the order and sends the information to Oracle Order Management for processing. Use this button if your customer is ready to make a purchase. If the submission is successful, you receive a confirmation number which corresponds to the order number in Oracle Order Management. If the submission is not successful, an error message appears.

## 1.4 Customers Types

You can sell to two types of customers:

- Person
- Organization

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**Note:** You cannot create customers within Oracle Order Capture. To create a customer, use Oracle TeleSales 11*i*, Oracle Customer Care 11*i*, or Oracle Accounts Receivable 11*i*.

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Customers of type **person** are individuals who are not purchasing on behalf of an organization. A consumer can have multiple addresses and phone numbers. For example, a consumer can have a home address and multiple shipping addresses for vacation homes, friends, and relatives.

Customers of type **organization** may be a company, a company subsidiary or branch, an association, a church or a government branch. Each organization can have multiple addresses and multiple contacts associated with it. Each address is associated with the organization, not with the individual contact using that specific address.

A **contact** represents an organization. Any individual at an organization can be your contact. Business contacts within an organization are set up with roles such as Ship To or Bill To. An organization can have multiple contacts, addresses, and phone numbers.

## 1.5 Understanding Quotes

A quote is an offer to a customer that contains priced items and shows a total price for the offer. You create a quote when you accumulate items in the Quote View for a customer and click the **Save Quote** button.

Oracle Order Capture automatically assigns a number to the quote. This number appears in the Quote # field of the Customer Information region. The quote number is composed of the quote number itself and a version number that increments each time a new quote version is created.

For example, your administrator can specify that if a quote is in the draft stage, any changes you make simply overwrite your previous entries. If the quote status is bid, each time you save a modified quote, the application creates a new version for you. These restrictions and permissions can be fully determined by your organizational policies and implemented by your Administrator. See [Understanding Quote Status](#) for more details.

Oracle Order Capture keeps a list of all of the quote versions you have created. You can view general information about all previous quotes for the customer by selecting the Quote tab in the Customer History window. You can also view the history of your current quote in the Quote History window. In the Order Capture main form, you can modify only the latest version of a quote. You cannot delete quotes once you create them. Your administrator can set quotes to expire automatically after a certain period of time.

## 1.6 Understanding Quote Status

The status of a quote indicates its progress from the initial offer until the order is placed. As you work on a quote, you indicate its progress by changing the Status. Quote status tells others in your group how the negotiations with the customer are progressing. Depending on how your administrator has defined your Quote statuses, it can also determine what kind of changes you and anyone else working with you can make to the quote.

The default quote statuses are automatically set when Order Capture is installed. Your system administrator may change these statuses based on business needs.

The status of a quote determines what kind of activities related to that quote are possible. Your administrator can set up and customize the rules governing each status in several ways, including the following:

- The administrator can decide for each status if a new version of the quote is created or if the quote is overwritten when you save changes to a quote.
- The administrator can decide which statuses allow modification of the quote.
- The administrator can decide the statuses to which a given status can change.

### 1.6.1 Pre-Defined Statuses

The following table shows the default quote statuses that are available:

**Table 1–1 Default Oracle Order Capture Quote Statuses**

Quote Status	Description
Drafted	Initial status.
Bid	Presented to customer.
Accepted	Customer accepted terms.
Order Problem	There is a problem with placing the order.
Order Reviewed	The order has been reviewed.
Entered	The order has been sent on to Order Management for processing with status Entered, i.e., it can be modified in Order Management.
Ordered	The order has been sent on to Order Management for processing with status Booked, i.e., it cannot be changed in Order Management.
Lost	The quote has not been accepted by the customer.
Inactive	No more activity on this quote.

Your administrator can set up additional statuses or decide not to use the included statuses by entering an end date for them, depending on your business processes.

### 1.6.2 Rules for Quote Status Changes

Status changes are regulated to prevent accidental changes, such as reverting an ordered quote status back to a non-ordered status.

The following table shows the suggested transition rules for quote status changes. The vertical columns shows the different statuses. The horizontal row shows the permissible status changes.

For example, a quote with the status of accepted can only be changed to order problem, order reviewed, lost, inactive, or ordered/entered. A quote with the status of ordered cannot be modified.

**Table 1–2 Suggested Permissible Quote Status Changes**

<b>From/To</b>	<b>Drafted</b>	<b>Bid</b>	<b>Accepted</b>	<b>Order Problem</b>	<b>Order Reviewed</b>	<b>Ordered</b>	<b>Lost</b>	<b>Inactive</b>
Drafted	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Bid	No	No	Yes	Yes	Yes	Yes	Yes	Yes
Accepted	No	No	No	Yes	Yes	Yes	Yes	Yes
Ordered	No	No	No	No	No	No	No	No
Entered	No	No	No	No	No	No	No	No
Order Problem	No	No	No	No	No	Yes	Yes	Yes
Order Reviewed	No	No	No	No	No	Yes	Yes	Yes
Lost	No	No	No	No	No	No	No	Yes
Inactive	No	No	No	No	No	No	No	No

Please note that these rules are only suggested. Your administrator has the ability to add, delete and modify these status change permissions.

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**Note:** You cannot change or remove the statuses Drafted, Entered, or Ordered cue to programmatic references.

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## 1.7 Understanding Orders

Order Capture allows you to place an order after a customer has decided to make a purchase. Order Capture estimates shipping costs and taxes before placing the order.

When you place an order, Order Capture passes the order to Oracle Order Management, an application that determines how the order is fulfilled. You will receive a confirmation number which is the order number in Order Management.

Use this number in Order Management to track final shipping costs and to verify that an order has been shipped.

When an order is placed in Order Capture for items that are out of stock, Order Management places these items on back order and determines when and how the items are shipped.

For example, a customer wishes to purchase ten items. Only seven are in stock; the other three are expected to be available in one month. The partial order flag in Order Management determines whether your customer receives the partial order of the seven available items immediately or the whole order is shipped in one month when all items become available.

Use Order Capture to update and modify quotes, not orders. To make changes to an order after you place it, use Order Management.

You can access some of the Order Management forms through the Orders tab in the Customer History window. See [Using Oracle Order Capture](#) for more information.

## 1.8 Item Types

The number of item types available depends on your system administrators settings. See *Setting up Lookup Types* in the *Oracle Order Capture Implementation Guide* for more information.

Order Capture comes with the following item types installed:

**Standard items:** These are generally products as opposed to services that your customer can purchase "as is". Standard items may include warranties that are shipped with the item. The Item Type field displays "Standard."

**Model items:** These are items that come with different options your customer can choose from before purchase. A configurable item displays "Model" in the Item Type field. When you enter a configurable item into the Item View tab, only the price of the most basic model appears. You can add different options to the base model after you add it to the shopping cart.

**Serviceable items:** These are items to which you can apply service items, e.g., a computer for which you can purchase installation. For these items, the **View Warranty** button and the **Installation Details** option under the Actions menu in the Order Capture form are enabled.

**Service items:** These are items such as service contracts, installations, and labor. Service items have a start date and an end date and are measured in units of time.

You must make entries in the Start Date, End Date, and Period fields when entering service items.

## 1.9 Related Items: Cross-Sell, Upsell, and Substitute

There are three kinds of related items you can access when the **Related Items** button is enabled in the Item View tab of the Order Capture form:

- A cross-sell item is an item that you can sell as an addition to the item currently on display.
- An upsell item is a more expensive model that you can substitute for the current item.
- A substitute item is an item you can substitute for one that is not currently available.

You system administrator can set up additional types of related items in Oracle Inventory.

## 1.10 How Items are Priced and Discounted

The price your customer pays for an item depends on the price lists and promotional discounts you enter.

### 1.10.1 Price Lists

The list price of an item comes from a price list. Price lists are set up in Oracle Pricing Manager. Your company can have many different price lists. For example, there may be a price list for a consumer and a corporate price list for corporate customers who receive an automatic discount because they buy from your company in bulk. You may have yet another price list for a customer that has a special contractual arrangement with your organization.

You can select a price list for the order as a whole and for each individual item. The price list for an item supersedes the price list for the whole order when determining the price for that specific item.

### 1.10.2 Discounts

Oracle Order Capture allows both order-level and line-level discounts. Order-level discounts are applied to the each line on the quote, while line-level discounts are

applied to specific line items only. If there are multiple discounts available for an order or a line, the application combines them.

### Example

A customer purchases a \$200 coat and a \$100 shirt. There is a 10% discount available for the shirt and a 50% discount available for the entire order. The quote price is calculated as follows:

- The coat:  $\$200 - 50\% = \$100$
- The shirt:  $\$100 - 60\% = \$40$
- Total price = \$140

## 1.10.3 Pricing Adjustments

The application is set up to calculate automatic adjustments (which are calculated in Advanced Pricing) applicable to the selected item and customer.

Each time you change an item on a quote, the whole quote is repriced automatically because a change in one item can affect the level of other offers and discounts.

## 1.11 Understanding the List of Values (LOV) Fields

In Order Capture, querying on the First Name or Last Name fields for a customer contact retrieves a pick list of contacts that details the first name, last name, customer number, and telephone number. There may be duplicate customer names with different customer numbers.

The company name (short name) is not included in the list. Also, if you choose a person from this pick list, the assigned organization or customer and account number are not uploaded automatically. You must query the Organization and Account fields to retrieve the values for the person specified.

The logic in the First Name and Last Name LOVs in Order Capture is closely integrated with the values in the Organization and Account fields. This integration controls the behavior of the Contacts LOVs in the following ways:

- If you specify an organization and query on the First Name and Last Name fields, the LOVs display all the persons associated with the organization by a relationship type of "Employee of" or "Contact of."

- If you query on the First Name and Last Name fields without specifying an organization, the LOVs display all the persons from Trading Community Architecture (TCA).
  - If you specify the First and Last Name values first, then query on the Organization field, the LOV displays all the organizations for which this person is a contact or employee.
- Customer Number is not the same as Account Number. If you specify a customer, either a consumer or a business, then query on the Account field, the LOV displays only the accounts for that customer. If you do not specify a customer, then the LOV retrieves all accounts.
  - If you specify First Name and Last Name, but not Organization, the party for the quote is a consumer (B2C case). If you then query the Accounts field, the LOV displays all the valid accounts for this person.
  - If you specify Organization, the party for the quote is a business (B2B case). If you then query on the Account field, the LOV displays all the valid accounts for this organization.

## 1.12 Understanding the Item and Price List LOVs

The Item and Price List LOVs are also closely integrated with each other and with the Unit of Measurement (UOM) and Currency fields. An item must always be specified with a UOM, and the price lists available for you to select are always limited by the currency chosen.

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**Note:** You should choose the currency before choosing any items or price lists. If you change the currency after choosing items or price lists, the Item and Price List fields do not refresh or go blank automatically. You must then reselect each item and price list to obtain values that are legitimate for the chosen currency. Otherwise, Oracle Order Capture will return an error message when you try to save the quote or place the order.

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If you select a price list without selecting an item first, the Item LOV shows only items in that price list. Selecting a price list in the Item View tab limits the Item LOV for that line only, not the entire quote. Selecting a header level price list in the Payment tab limits the Item LOVs for all items in the quote that do not have a line level price list in the Item View tab.

If you select an item and its UOM without selecting a price list first, the Price List LOV in the Item tab shows only price lists where the item and its specified UOM exist, as determined by the pricing API. For example, if you select a gallon of "Clover Honey," then the Item Price List LOV shows only the price lists for the chosen currency that include "Clover Honey" with the UOM "gallon." The Item Price List LOV does not show price lists that include "Clover Honey" with the UOM "pint."

If you select a UOM and a price list, without selecting an item first, the Item LOV shows only items with the selected price list and UOM.

The UOM LOV is not restricted by price lists, but it is restricted by item. If you select an item, its UOM and a price list, and that UOM is not on the specified price list, Pricing will check for the primary UOM for that item and return a price for the primary UOM. For example, you select a gallon of "Clover Honey" and a price list, yet the UOM gallon is not on the price list. Pricing will search for the primary UOM for "Clover Honey", which happens to be pint. Pricing will return a price for pint, even though gallon is still the selected UOM. If you select an item, the UOM LOV returns all valid UOMs for the item.

The following table demonstrates how the interrelationship between the Item, UOM, and Price List LOVs affects their values.

**Table 1–3 Item, UOM, and Price List LOV Behavior**

<b>Is a Price List Selected?</b>	<b>Is an Item Selected?</b>	<b>Is a UOM Selected?</b>	<b>Behavior</b>
Yes	No	No	LOVs display all items and UOMs on the specified price list.
No	Yes	No	Price List LOV displays all price lists for the specified item.
Yes - header level	No	No	Item LOV displays all items on the specified price list, that do not have line level price lists.
No	Yes	Yes	LOV displays only price lists where the specified item and UOM exist.
Yes	No	Yes	Item LOV shows only items with selected UOM and price list.
Yes	Yes	Yes - but this UOM is not on selected price list	Pricing searches for the primary UOM for the item and returns a price based on the primary UOM.

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**Note:** Order Capture only displays current items that will expire from the chosen price list on or after the designated quote expiration date.

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### 1.12.1 Agreements

If an agreement has been selected in the Payment tab, Order Capture will default the price list based on the agreement. Yet, the user can override the default price list by choosing one from the price list LOV.

### 1.12.2 Related Items and Warranties

You may need to select a different price list when choosing a related item or a service for an item currently in the Item View tab.

When you select a related item or service Order Capture will display an LOV form with a list of valid price lists for the user to choose from. If only one price list exists, the system will automatically choose that price list and price the item accordingly.

See [Cross-Selling, Upselling, and Substituting Items](#) for information on how to choose a related item for an item currently in the Item View tab.

See [Adding a Service to the Shopping Cart](#) for information on how to choose a service for an item currently in the Item View tab.

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# Using Oracle Order Capture

## 2.1 Overview of Using Oracle Order Capture

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

- [Creating a Quote](#)
- [Selecting an Existing Customer in the Order Capture Form](#)
- [Selecting an Item in the Item View Tab](#)
- [Clearing an Item from the Item View Tab](#)
- [Adding Items to the Shopping Cart for a Quote or Order](#)
- [Removing Items from the Shopping Cart or Quote](#)
- [Entering Payment Information](#)
- [Entering the Billing Address for an Order](#)
- [Entering the Shipping Address for an Order](#)
- [Shipping an Item to Alternate Destinations](#)
- [Searching Using the Query Method](#)
- [Viewing the List of Items in the Shopping Cart or Quote](#)
- [Scrolling Through the Items in the Shopping Cart](#)
- [Determining If an Item Has Been Added to the Shopping Cart](#)
- [Adding a Service to the Shopping Cart](#)
- [Viewing Warranty Information for an Item](#)
- [Entering Installation Details](#)

- [Configuring an Item](#)
- [Cross-Selling, Upselling, and Substituting Items](#)
- [Finding Out When an Item Will Be Available](#)
- [Pricing an Item](#)
- [Pricing Configurable Items](#)
- [Adjusting Prices of an Item in a Quote](#)
- [Adjusting Prices for a Whole Quote](#)
- [Viewing Adjustments](#)
- [Copying a Quote](#)
- [Printing a Quote](#)
- [Viewing the Status of a Print Job](#)
- [Viewing the History of a Quote](#)
- [Viewing Customer Quotes](#)
- [Modifying a Customer Quote](#)
- [Placing an Order](#)
- [Viewing Customer Orders](#)
- [Using Descriptive Flexfields](#)

## 2.2 Creating a Quote

A quote lists the items your customer is interested in purchasing before you place an order. Use this procedure to create a quote.

### Steps

1. Log in to Oracle Forms under the Order Capture Sales Agent responsibility.
2. Choose **Order Capture** from the Navigator.
3. Enter the customer information for the quote.
  - a. Use the First Name LOV to enter the customer or contact's first name.
  - b. Use the Last Name LOV to enter the customer or contact's last name.
  - c. Use the Phone LOV to enter the customer's phone number

- d. Use the Organization LOV to enter the customer's organization.
  - e. Use the Account LOV to enter an account number for the customer. If there is only one account number, this field will automatically populate when you select a customer.
  - f. Enter a name for the quote in the Quote Name field.
  - g. Use the Sales Rep LOV to enter a sales representative for the quote.
4. Add items to the quote.
- a. Use the Item LOV in the Item View tab to select an item.
  - b. Use the UOM LOV to enter a unit of measurement for the item. The default UOM for the item will automatically populate the field.
  - c. Enter the quantity you wish to purchase in the Qty field. The default quantity will automatically populate the field.
  - d. Use the Price List LOV to choose a price list for the item.
  - e. If the item has related items available, the **Related Items** button will be enabled. Use this button to cross-sell, up-sell, or substitute an item.
  - f. Click the Add to Cart button.  
 Once you click this button, the item shows up in the Shopping Cart tab.
5. Adjust discounts by changing price list selections. This is an optional step. For instructions, see [Adjusting Prices of an Item in a Quote](#) and [Adjusting Prices for a Whole Quote](#).
6. Click **Save**.  
 The application saves the quote under the number listed in the Quote # field in the Header Information Region.

## 2.3 Selecting an Existing Customer in the Order Capture Form

Use this procedure to find and enter a customer in the Header information Region of the Order Capture form.

### Prerequisites

The customer must exist in the database.

## Steps

1. Navigate to the Order Capture form.
2. If a customer is already displayed in the Header Information region, then:
  - a. Place your cursor in either the last or first name fields.
  - b. Click **New** in the File menu.
  - c. A dialog box appears asking if you wish to save your changes.
  - d. Save or cancel any changes you have made by clicking the appropriate button.

The Header Information Region clears.
3. If you know the account number for your customer, then:
  - a. Enter the account using the Account LOV.

If the customer is a person, the customer's name appears automatically. The Organization field remains blank.

If the customer is a business contact, the Organization name appears automatically.
  - b. If the customer is a business contact and the organization appears automatically without a contact name, select the correct contact using the Last Name LOV.
4. If the customer is a consumer and you do not know that customer's account number, then:
  - a. Use the Last Name LOV to enter the customer's name.
  - b. If the name is a common name and the list of names in the LOV is too long, use the query method to search on the name and partial phone number.
5. If the customer is a business customer and you do not know the account number, then:
  - a. Use the Organization LOV to enter the customer's organization.

Selecting an organization restricts the names displayed in the first name and last name LOVs to contacts at that organization.
  - b. Use the Last Name LOV to enter the customer's last name.

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**Note:** See [Understanding the List of Values \(LOV\) Fields](#) for a detailed explanation of the LOV behaviors on the form.

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## 2.4 Selecting an Item in the Item View Tab

Use this procedure to enter an item into the Item View tab.

### Prerequisites

None.

### Steps

1. Navigate to the Item View tab.
2. Place your cursor in the Item field.
3. If the Item View tab already displays an item, then click **New Record** in the toolbar. This is the button with a green plus sign.
4. Use the LOV to enter the item.

The item displays in the tab. You are now ready to add the item to the cart.

## 2.5 Clearing an Item from the Item View Tab

Use this procedure to remove from the Item View tab an item that has not yet been added to the shopping cart.

### Prerequisites

The item must be displayed in the Item View tab.

### Steps

1. Navigate to the Item View tab.
2. Check to see if the item displayed has been added to the shopping cart.
3. If it has not been added to the shopping cart, then click **Clear**.

## 2.6 Adding Items to the Shopping Cart for a Quote or Order

Use this procedure to add items to the shopping cart. The procedure is the same whether you are creating a quote or an order.

### Prerequisites

Your customer must be displayed in the Header Information Region of the Order Capture form.

### Steps

1. Navigate to the Item View tab.
2. Place your cursor in the Item field.
3. If the Item View tab already displays an item, click **New Record** in the toolbar. This is the button with a green plus sign.
4. If the Item View tab is blank, use the LOV to enter the item.  
The item displays in the tab.
5. Enter the quantity in the Qty field.
6. If the Item Type is Model, then the item is configurable. The item displayed is the base model. You can configure this item to add more components.  
For all other items the item pricing appears. The Unit Price shows the list price of this item from the price list shown in the Price List field.
7. If the Related Items button is enabled, you can view and select upsell, cross-sell, and substitute items.
8. If you wish to add this item into the shopping cart, click **Add To Cart**.
9. Repeat this procedure to add other items to the shopping cart.

When you are done you are ready to:

- Create a quote
- Place an order

## 2.7 Removing Items from the Shopping Cart or Quote

Use this procedure to remove items from the shopping cart or quote.

### Prerequisites

There must be at least one item in the shopping cart.

### Steps

1. Navigate to the Item View tab.
2. Check to make sure you are viewing the contents of the shopping cart.  
If the Item View tab displays an item not in the shopping cart, then clear it by clicking **Clear**.
3. If the shopping cart contains multiple items, use the arrow buttons to display the item you wish to delete.
4. With the item to be deleted displayed in the Item View tab, click **Remove**.

## 2.8 Entering Payment Information

Use this procedure to enter payment information for your customer.

### Prerequisites

The Header Information Region must display the customer.

### Steps

1. Choose the Payment tab.
2. Use the Agreement LOV to enter an agreement, if one exists.  
Agreement terms with a customer are set up by your company in Oracle Pricing. Agreements can include price lists, discounts, payment terms, and shipping address.
3. Select the payment terms using the Payment Terms LOV.
4. From the Payment Type drop-down list, select the payment type.
  - a. If you have selected cash as the payment type, click **Save** on the toolbar.
  - b. If you have selected check as the payment type, then:
    - In the Number field, enter the check number.
  - c. If you have selected purchase order as the payment type, then:
    - In the Number field, enter the purchase order number.

- d. If you have selected credit card as the payment type, then:
  - From the Credit Card drop-down list, select the credit card type.
  - Enter the credit card holder's name.
  - In the Number field, enter the credit card number.
  - Enter the expiration date.
- e. Click **Save** on the toolbar.

If Oracle iPayment is also installed, the application performs a credit card check and displays an approval code. For more information, consult the *iPayment Concepts and Procedures* manual.

## 2.9 Entering the Billing Address for an Order

Use this procedure to enter a billing address for an order.

### Prerequisites

- The Header Information Region of the Order Capture form must display the customer.
- The individual to be billed and the billing address must already exist in the database.

### Steps

1. Select the Bill To tab.
2. If no name appears in the Name field or you wish to bill a different individual, then use the Name LOV to enter the correct name.
3. Use the Address LOV to select a billing address.
4. If the shipping address is the same as the billing address, place a check in the box next to "Ship to the Same Address".
5. Click **Save** on the toolbar.

## 2.10 Entering the Shipping Address for an Order

Use this procedure to enter the shipping address for the order.

### Prerequisites

The Header Information Region of the Order Capture form must display the customer.

### Steps

1. Select the Ship To tab.
2. If the correct individual does not appear in the Name field, then enter the individual using the LOV.
3. If you wish to ship individual items to a different shipping address than the one you enter here, follow the procedure outlined in [Shipping an Item to Alternate Destinations](#).
4. Use the Address LOV to select a shipping address.
5. Click **Save** in the Toolbar.

## 2.11 Shipping an Item to Alternate Destinations

Use this procedure to ship an item to one or more addresses that are different from the shipping address for the order as a whole.

You can use this procedure to ship quantities of an item to multiple locations. For example, a customer who is ordering an item with a quantity of 10 can ship two to one address, three to another, and five to a third.

### Prerequisites

You must save your quote before performing this procedure.

### Steps

1. Display the item you wish to ship to an alternate destination in the Item View tab.
2. Place the cursor in an Item View field.
3. From the Actions menu, choose **Shipping**.

The Shipping form appears.

4. In the Qty field, enter the quantity you wish to send to the alternate address.

You can specify a partial quantity or the whole quantity, depending on whether you wish to send an item to one or more shipping addresses.

5. Use the Ship To LOV to enter the name of the individual to which you wish to ship the item.
6. Use the Address LOV to enter an address.
7. Enter any shipping or packing instructions.
8. If you wish to ship another quantity of the same item to a different destination, click Next and repeat the above steps.
9. Click Apply to Shipment to apply the alternate shipment address.
10. Click OK to save the new shipping addresses and return to the main Order Capture form.

## 2.12 Searching Using the Query Method

Use this method to search for customers or addresses in Order Capture using multiple criteria.

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**Note:** This general method of searching can also be used in other Forms application forms.

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### Prerequisites

None.

### Steps

1. Place your cursor in one of the fields in the region you wish to search.
2. From the View menu, choose **Query by Example > Enter**.  
The searchable fields turn blue.
3. Enter a full or partial value into one of the fields. You can use a wild card. For example, if you enter F%, the application returns all entries starting with the letter F.
4. From the View menu, choose **Query by Example > Run**.
5. The application displays a matching entry, if any.
6. Check the status bar to see how many matching entries were found. If the application found more than one matching entry, then click the cursor in any field and use the down arrow on the keyboard to scroll through.

## 2.13 Viewing the List of Items in the Shopping Cart or Quote

Use this procedure to view a list of items in the shopping cart.

### Prerequisites

An item must be added to the shopping cart before it appears in the list.

### Steps

1. Click on the Shopping Cart View tab.  
The list of items in the list displays.
2. If you wish to view the details of an item in the list, then:
  - a. Note the item's position in the list.
  - b. Select the Item View tab and scroll to the item.

## 2.14 Scrolling Through the Items in the Shopping Cart

Use this procedure to scroll through the items in the shopping cart.

### Prerequisites

You must have items added to your quote.

### Steps

1. Navigate to the Item View tab of the Order Capture form.
2. If the tab displays an item, check to see if it is in the shopping cart.
3. If the tab displays an item that has not been added to the shopping cart, then, before you can view the shopping cart, you must either:
  - Clear it by clicking **Clear**.
  - Add it to the shopping cart by clicking **Add to Cart**.

Click the appropriate button to scroll through the shopping cart:

- Use the **right arrow** button to advance to the next item in the quote. If you are viewing the last item in the quote, clicking this button creates a new item in the quote.
- Use the **left arrow** button to go to the previous item in the quote.

- Use the **double right arrow** button to go to the last item in the quote.
- Use the **double left arrow** button to go to the first item in the quote.

## 2.15 Determining If an Item Has Been Added to the Shopping Cart

Use this procedure to determine if the item displayed in the Item View tab has been added to the shopping cart.

### Prerequisites

The Item View tab displays an item.

### Steps

1. Navigate to the Item View tab of the shopping cart.
2. Check if the Current Item field and the Items in Shopping Cart field both display numbers.
  - A number in both fields indicates you are viewing an item already in the shopping cart.
  - A number in only the Items in Shopping Cart field indicates the item displayed has not yet been added to the cart.
  - If both fields are empty, there are no items in your quote.

## 2.16 Adding a Service to the Shopping Cart

Use this procedure to enter a service for a serviceable item in a quote or order.

You can apply a service only against a serviceable item already in the database. The item can be in a quote, order, or the customer's installed base of products. You cannot purchase a service on its own.

### Prerequisites

Your customer must be displayed in the Header Information Region of the Order Capture form.

### Steps

1. Navigate to the Item View tab.
2. Place your cursor in the Item field.

3. If the Item View tab already displays an item, then click **New** in the toolbar.
4. If the Item View tab is blank, then use the LOV to enter the item.  
The item displays in the tab.
5. Enter either the start date and the end date for the service or the start date and the duration.
6. Click **Add to Cart**.  
The Service Reference form appears.
7. Select the appropriate category from the Service For list:
  - **Quote:** if the service is for an item in a quote.
  - **Order:** if the service is for an item in an order.
  - **Customer Product:** if the service is for an item in a product already installed at a customer site.
8. If the service is for a quote item, use the Reference Number LOV to enter the line number of the item. The reference number is a concatenation of the quote number and the line number of the item.
9. If the service is for an order item, use the Reference Number LOV to enter the line number of the item. The reference number is a concatenation of the order number and the line number of the item.
10. If the service is for an item that is already installed at a client site, enter the serial number of the item.
11. Click **OK** to save and close the Service Reference form, and return to the Order Capture form.  
The Service item is added to the cart at this point.
12. Repeat this procedure to add other items to the shopping cart.
13. When you are done you are ready to:
  - Create a quote
  - Place an order

## 2.17 Viewing Warranty Information for an Item

Use this procedure to view the warranty information for an item displayed in the Item View tab. The View Warranty button is only enabled if the item includes a warranty.

### Prerequisites

The item must be added to the quote and displayed in the Item View tab.

### Steps

1. Click **View Warranty**.

The Warranties window appears displaying a list of warranties included with the item. This window is read-only.

## 2.18 Entering Installation Details

Use this procedure to enter installation details for serviceable items. Serviceable items are items for which your customer can purchase service agreements.

### Prerequisites

The item must be added to the shopping cart and displayed in the Item View tab.

### Steps

1. The cursor must be in one of the fields in the Item View tab.
2. From the Action menu, choose **Installation Details**.

The Installation Details form appears. This is an Oracle Service form.

3. In the Transaction tab, use the Transaction Type LOV to select a transaction type.
4. Enter a quantity.
5. If the item requires a new system to be created, then:

- a. Click **AutoCreate System**.

The AutoCreate Systems form appears.

- b. Enter the quantity.
  - c. Enter the other values using the LOVs.
  - d. Click **OK**.
6. Use the System LOV to enter a system.
7. Use the Contact LOVs to enter optional contacts for the installation.
8. Use the Location LOV to enter a location where the item is to be installed.
9. If you have not selected New as the transaction type, then enter a reference number in the Reference tab.
10. Click **Add**.
11. Click **OK**.

## 2.19 Configuring an Item

Use this procedure to configure a Model item.

### Prerequisites

- The Model item must be displayed in the Item View tab and must be added to the quote.
- The quote must be saved.

### Steps

1. Display the item you wish to configure in the Item View tab.
2. The cursor must be in an Item View field.
3. From the Tools menu, choose **Configure Item**.  
The Oracle Configurator form appears.
4. In the left pane of the window, select the category of option you wish to add to the base item.  
The items in the category and their descriptions appear in the top right hand pane.
5. Select the item(s) you wish to add to the shopping cart by clicking the check boxes to the left of each item.

6. After adding each component, click on the arrow button to the right of the Total Price field to view the total price of the configured item.

7. Click **Done**.

The items you selected are added to the shopping cart.

## 2.20 Cross-Selling, Upselling, and Substituting Items

Use this procedure to sell a substitute, a cross-sell, or up-sell item to your customer.

### Prerequisites

- The item you wish to cross-sell, upsell, or replace with a substitute must be added to the shopping cart and displayed in the Item View tab.
- The **Related Items** button must be enabled, indicating that related items have been set up for this product. (This button will not be enabled if relationships are not set up correctly in Oracle Inventory).

### Steps

1. Click **Related Items** in the Item View tab.

The Related Items window appears.

2. To add a related item to the cart:
  - a. Click on one item in the list to select it.
  - b. Click **OK**.

A pop-up window shows the available price lists for the related item. If only one price list exists, Order Capture will automatically choose that price list and price the item accordingly.

- c. Choose a price list for the related item.
  - d. Click **OK** to close the price list window and return to the Order Capture form.
3. The item you selected in the Related Items window and its price is displayed in the Item View tab.
  4. Click **Add to Cart** for any item you wish to add to the cart.

### Guidelines

Here is how choosing a related item changes the shopping cart:

- Adding an upsell item replaces the item in the cart.
- Adding a cross-sell item adds the item to the cart. You can add multiple cross-sell items to the cart.
- Adding a substitute item replaces the item in the cart.

See [Understanding Oracle Order Capture](#) for more details about related items.

## 2.21 Finding Out When an Item Will Be Available

Use this procedure to find out when the desired quantity of an item will be available. You need to use this procedure only when the quantity available in the Qty field is less than the quantity desired by your customer.

Items are reserved for your customer either when you place the order or not at all. The point at which inventory items are reserved for your customer depends on the setting of the system profile option ASO: Reservation Level. Contact the application administrator for details. Items are not reserved for your customer before you successfully place the order.

### Prerequisites

The item must be displayed in the Item View tab of the shopping cart.

### Steps

1. From the Actions menu, choose **Availability - Item**.

The Available Date field displays the date when all of the requested quantity will be available for shipping.

If you place the order, then your customer receives all of the currently available quantity. The balance is placed on back order and shipped on the available date.

2. Click **OK**.

The available date becomes the date in the Scheduled field of the Item View tab.

## 2.22 Pricing an Item

Use this procedure to price an item in the Item View tab. The price list of an item can be designated either at the header level or the item level. Price lists at the header level apply to all items in a quote, while price lists at the line level apply only to the item displayed in the Item View. Item level price lists supersede header level price lists. For more information, see [How Items are Priced and Discounted](#).

### Prerequisites

You must know to which price list or lists the item belongs.

### Steps

1. If you wish to apply one price list to all items in your quote, choose a price list from the Payment tab before adding items to the quote.
2. If you wish to apply a price list only to the item displayed in the Item View tab:
  - a. Enter the item into the Item View tab.
  - b. Enter the quantity in the Qty field.
  - c. If the Item Type is model, then you must view its price following the procedure outlined in [Pricing Configurable Items](#).
  - d. If the item is a service, then use the Period and Duration LOVs to enter the period and duration of the service.
  - e. A default price list will automatically populate the Price List field in the Item View tab. Use the LOV to enter a different price list.

The item pricing appears. The Unit Price shows the list price of this item from the price list displayed in the Price List field.

You are now ready to:

- View an item or add another item to the quote
- Create a quote
- Adjust prices
- Enter payment information

## 2.23 Pricing Configurable Items

Use this procedure to price configurable items. You must configure these items before pricing because their price depends on the options your customer chooses.

### Prerequisites

The Item View tab must display an item of Item Type Model.

### Steps

1. Click **Add to Cart** to add the model item into the shopping cart.

2. The Item View tab displays the model item. This is usually the most basic configuration.
3. Configure the item. See [Configuring an Item](#) for instructions.  
List prices for each component are visible in the Configurator window.
4. Navigate back to the model you entered originally to view the total price of the item and its options.
5. If your customer decides not to purchase the item after you have configured it, then you must remove the item. (The components are removed automatically.) See [Removing Items from the Shopping Cart or Quote](#) for instructions.
6. To reconfigure the item, use the **Configure Items** option in the Action Menu.

## 2.24 Adjusting Prices of an Item in a Quote

Use this procedure to adjust the price of an item for your customer.

### Prerequisites

The item and its price must be displayed in the Item View Tab.

### Steps

You can modify prices for an individual item in your quote by:

- Selecting a different price list from the Price List LOV. Different price lists can price the item differently.
- You can also modify the price of an item by selecting the item and then selecting the Promotions option in the Action menu. You will see any available promotions that apply to the item. When you select the promotion, the item price will be adjusted.

## 2.25 Adjusting Prices for a Whole Quote

Use this procedure to adjust prices for an entire quote, for example, if there was a promotion that gave customers 20% off their entire order.

### Prerequisites

The quote you wish to adjust must be displayed in the Order Capture form.

## Steps

You can adjust the prices for your quote by:

- If you have not selected any items for your quote, you can modify prices for a whole quote by selecting a different price list for the quote in the Payment tab. See [Pricing an Item](#) for more information. Any items that are added will use the new price list selected.
- If you already have items in your quote, you must select the new price list for each item. See [Adjusting Prices of an Item in a Quote](#).
- You can also modify the price of a whole quote by selecting the **Promotions** option in the Action menu. You will see all available promotions that are set up in Pricing, even those that are not applicable to your quote. When you select the promotion, the quote price will be adjusted.

To adjust prices for an individual item rather than for the quote as a whole, see [Adjusting Prices of an Item in a Quote](#).

## 2.26 Viewing Adjustments

Use this procedure to view price adjustments. Price adjustment details are read-only in Order Capture. All price adjustments are set up in Oracle Pricing.

### Prerequisites

The items in the quote must be saved as a quote.

### Steps

To view discounts for the order as a whole:

1. Place the cursor in any field in the Header Information Region.
2. From the Actions menu, choose **Price Adjustments**.

The Price Adjustments window appears.

The window lists the adjustments that apply to all lines on the order, yet it does not show line level adjustments. You cannot make any modifications.

3. Click **OK** to return to the main Order Capture form.

To view adjustments for an individual item:

1. Place the cursor in any field for the item.
2. From the Actions menu, choose **Price Adjustments**.

The Price Adjustments window appears.

The window lists the adjustments that apply for this line. You cannot make any modifications.

3. Click **OK** to return to the main Order Capture form.

## 2.27 Copying a Quote

Use this procedure to copy a quote. You can copy either just the basic contact and quote information, billing and shipping addresses, and payment information, or the entire quote including the line item and pricing information. For example, a user could use Copy Quote: Header Only if they need to create another quote for the customer who's quote is currently displayed in the Order Capture form. Copy Quote: Header and Lines could be useful for a user who wants to create two copies of the same quote with an item difference.

### Prerequisites

The original quote must be displayed in the Order Capture form.

### Steps

1. Place the cursor in a header level field.
1. From the Tools menu, select **Copy Quote**.  
The Copy Quote window appears.
2. In the Copy Quote window under the Copy heading, highlight the radio button for one of these two options:
  - Header only: This option copies the basic contact and quote information in the Order Capture form header, and the address and payment information in the Bill To Address, Ship To Address, and Payment tabs.
  - Header and lines: This option copies all of the information copied by the Header only option, along with the quote's line item details.
3. Under the Copy To heading, highlight the radio button for one of these two options:
  - New quote: This option copies the quote information you selected under the Copy heading into a new quote.

- Revision: This option copies the quote information you selected under the Copy heading into a new version of the existing quote. You cannot create a revision of a quote with Entered or Ordered status.
4. Click **OK**. A new or revised quote is created and appears in the Order Capture form. The quote number is automatically generated.

## 2.28 Printing a Quote

Use this procedure to print a quote. The ability to print a quote allows users to give customers hard copies of quotes that have been entered in the Order Capture UI.

The Print Quote report displays all the information available to users in the Order Capture UI, including header level, line level, and pricing information. Oracle Order Capture uses Oracle Reports to produce the Print Quote report.

### Prerequisites

The report functionality must be set up in Oracle Reports. The quote must be Saved and must be displayed in the Order Capture form.

### Steps

1. From the Tools menu, select **Print Quote**.  
A Note window opens with a Request ID #. Record this number if you want to view the status of your print job.
2. Click **OK**.

## 2.29 Viewing the Status of a Print Job

Use this procedure to view the status of a print job. This procedure is useful if you are having problems printing your document or if you want to check which printer you have set up.

1. Navigate to **View > Requests**.
2. Choose **Specific Requests**.
3. Enter the Request ID #, generated when you choose **Print Quote** from the Tools menu, into the Request ID field.
4. Click **Find**.

A Requests pop up window opens, displaying your request and its status.

5. To view what the print out will look like, click on the **View Output** button.
6. Close the window.

## 2.30 Viewing the History of a Quote

Use this procedure to view the history of the current quote. The quote history gives you basic information only. This includes the dates and times when previous versions of the quote were created as well as the identity of the individual who created them. You cannot view the detailed pricing of the quote in this version of Order Capture.

### Prerequisites

The quote must be displayed in the Order Capture form.

### Steps

1. From the Reports menu, select **Quote History**.  
The Quote History window appears listing basic information about this quote.
2. Click **OK** to close this window.

## 2.31 Viewing Customer Quotes

Use this procedure to view a list of the quotes prepared for this customer.

### Prerequisites

The customer must be displayed in the Order Capture form.

### Steps

1. From the Reports menu, select **Customer History**.  
The Customer History window appears.
2. Select the Quotes tab.  
The tab lists all quotes for this customer.

## 2.32 Modifying a Customer Quote

Use this procedure to find and modify a customer quote.

## Prerequisites

The customer must be displayed in the Order Capture form.

Whether you can modify a quote depends on its status. Not all quote statuses allow you to make modifications. Modification permissions are set up by the application administrator. For example, your administrator can specify that a quote with a status of ordered cannot be modified.

## Steps

1. From the Reports menu, select **Customer History**.

The Customer History window appears.

2. Select the Quotes tab.

The tab lists all quotes for this customer.

3. If you wish to view the quote and modify it, click **View Quote**.

The quote displays in the Order Capture form. Only the latest version of a quote can be modified.

4. Modify the quote by:

- Modifying customer information
- Changing item quantities
- [Adding Items to the Shopping Cart for a Quote or Order](#)
- [Adjusting Prices of an Item in a Quote](#)
- [Removing Items from the Shopping Cart or Quote](#)
- [Entering the Billing Address for an Order](#)
- [Entering the Shipping Address for an Order](#)

5. If required by your departmental procedures, change the status of the quote by selecting an appropriate status from the Status LOV. For example, when a customer approves a quote, you can change the status of a quote from draft to approved.

6. Click the **Save** button.

Depending on the status of the quote, the changes you have made are saved either in the version of the quote you are editing or in a new version. See [Understanding Quote Status](#) for more information.

## 2.33 Placing an Order

Use this procedure to create an order directly from the Order Capture form or from a quote you have created.

### Steps

1. If you are creating an order from a quote, display the quote in the Order Capture form.
2. Add items to the quote, if necessary. See [Adding Items to the Shopping Cart for a Quote or Order](#) for more information.
3. Adjust discounts. This is an optional step. See [Adjusting Prices of an Item in a Quote](#) and [Adjusting Prices for a Whole Quote](#).
4. If the billing information in the Bill To tab has not been entered, then enter it.
5. If the shipping information in the Ship To tab has not been entered, then enter it.
6. If the payment information in the Payment tab has not been entered, then enter it.
7. Click **Place Order**.

Your order is submitted to Oracle Order Management and you receive a confirmation number. You must track the order in Order Management to check on its status and to make sure that the order is filled and shipped.

## 2.34 Viewing Customer Orders

Use this procedure to view orders placed by this customer with Order Management. This includes, but is not limited to, the orders placed through Order Capture.

### Prerequisites

The customer must be displayed in the Order Capture form.

### Steps

1. From the Reports menu, select Customer History.  
The Customer History window appears.
2. Select the Orders tab.
3. Select an order and click **View Order** to view its details.

The order information displays in an Order Management window. For instructions on how to use Order Management, consult the help system for that application.

4. If you wish to create a new order, click **New**.

## 2.35 Using Descriptive Flexfields

Use this procedure to enter information into flexfields.

See the *Oracle Order Capture Implementation Guide* and the *Oracle Applications Flexfields Guide* for more information on setting up flexfields.

### Prerequisites

Flexfields must be set up/customized identically in Order Capture and Order Management.

### Steps

1. Click in the descriptive flexfield to display the flexfield form.
2. Enter a value into each segment, either by typing it in or by choosing from the LOV.
3. Click **OK** to close the flexfield form.