Oracle® HTML Quoting

Implementation Guide

Release 11*i*

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This document describes the steps necessary to implement Oracle HTML Quoting and to set up your sales representatives and other personnel to create and subsequently modify quotes.

1 Overview of Setting Up Oracle HTML Quoting

Sales representatives and other organization personnel can use Oracle HTML Quoting to create and manage quotes on a customer's behalf.

You must first set the sales representatives up as Oracle HTML Quoting users who have Sales Representative roles. A Sales Representative role's permissions determine whether the user can submit quotes as orders, and to what extent the user can modify a quote.

You can assign a Sales Representative role to sales personnel within your organization, to value-added distributors and partners (VAD/Partner) of your organization, and to anyone else who should be authorized to create quotes for your customers.

2 Dependencies

Oracle HTML Quoting depends on Oracle iStore, Oracle Inventory, Oracle Order Capture, Oracle Order Management, and Oracle Pricing, which in turn depend on other Oracle application modules.

2.1 Oracle iStore

You must install Oracle iStore before using Oracle HTML Quoting. Oracle HTML Quoting uses the Oracle iStore permissions, specialty stores, and shopping cart, as well as some Oracle iStore (IBE) profile options.

Permissions A Sales Representative role in Oracle HTML Quoting uses Oracle iStore permissions. See *Oracle iStore Implementation Guide* for more information about Oracle iStore permissions.

Specialty stores You must set up at least one Oracle iStore specialty store with the products that you want the sales representatives to sell.

You can set up multiple specialty stores for your sales representatives with different listings of products, which allows additional flexibility and control for you to do the following:

- Organize products to help your sales representatives find specific products easily
- Restrict which products a given sales representative can sell, by giving him or her access to some specialty stores and excluding him or her from others

See *Oracle iStore Implementation Guide* and *Oracle iStore Concepts and Procedures* for more information about setting up specialty stores.

Note: Specialty stores are also called "minisites."

Shopping cart The sales representative builds quotes for customers by leveraging the Oracle iStore shopping cart functionality. For all intents and purposes, a shopping cart and a quote are the same. The same object is referred to as a shopping cart with respect to B2B and B2C customers in Oracle iStore, and as a quote with respect to the sales representatives in Oracle HTML Quoting. See *Oracle iStore Concepts and Procedures* for more information about the Oracle iStore shopping cart.

Profile Options See Section 9, "Profile Options" for more information about the Oracle iStore profile options that you need to set when implementing Oracle HTML Quoting.

2.2 Oracle Inventory

The setup of Oracle iStore is dependent on product item setup in Oracle Inventory. See *Oracle iStore Implementation Guide* and *Oracle Inventory User's Guide* for more information.

This section addresses the setup of items to allow trade-ins, a specific Oracle HTML Quoting functionality.

If your merchant organization provides credit to customers for returning or decommissioning existing products when they purchase new products, you can set up Oracle HTML Quoting to allow a sales representative to add a customer's trade-in items to a quote.

Sales representatives add trade-in items to a quote by performing a product search for the items, adding the items to the quote, and marking their line type as **Return**. When the application calculates the order total, it recognizes items with the line type **Return** as trade-in items. The application treats the trade-in items' prices as credits and subtracts them from the order total.

All items on a quote, including trade-in items, must exist in Oracle Inventory. All items that are eligible for trade-in must have their Returnable flags set to **Yes.**

Any obsolete items that are eligible for trade-in must still exist in Oracle Inventory.

If your merchant organization allows trade-ins of other merchants' products that would not exist in your instance of Oracle Inventory, you must set up dummy items in Oracle Inventory to represent these trade-in items for the quotes.

For obsolete or dummy items, set the Customer Orderable flag to **No.**

Use the following procedure to set the Returnable flag for an item that is eligible for trade-in.

Steps

1. Launch Oracle Forms by navigating to:

   ```
   http://<host>:<apache port>/
   ```

   and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).

2. Log in with the Inventory responsibility.
3. Choose **Items > Master Items.**

   The Organizations window opens.

4. In the Organizations window, search for and highlight the organization that has the trade-in item, and click **OK.**

   The Master Item form opens.

5. Choose **View > Find.**

   The Find Master Items window opens.

6. In the Find Master Items window, enter your search criteria for the trade-in item, and click **Find.**

The Master Items Summary window opens.

7. Highlight the trade-in item and click **Open.**

   The Master Item form for the trade-in item opens.

8. In the Order Management tab, check the Returnable checkbox.

9. Optional: In the Order Management tab, uncheck the Customer Orders Enabled checkbox for obsolete or dummy trade-in items.

10. Click the Save icon in the toolbar to save the record.

You must also set the profile option IBE: Use Line Types to **Yes** to allow sales representatives to mark items as trade-ins by changing their line types to **Return.** See Section 9, "Profile Options" for more information.

2.3 Oracle Order Capture

Oracle iStore is dependent on the setup of Oracle Order Capture. See *Oracle iStore Implementation Guide* and *Oracle Order Capture Implementation Guide* for more information.

This section addresses the setup of quote status transitions to allow quote versioning in Oracle HTML Quoting.

Sales representatives can create multiple versions of a quote for a customer.

To enable the versioning functionality, you must set up Oracle Order Capture to allow the quote status to transition from Drafted to Drafted.

Use the following procedure to set up the Drafted-to-Drafted status transition.

Steps

1. Launch Oracle Forms by navigating to:

   ```
   http://<host>:<apache port>/
   ```

   and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).

2. Log in with the Order Capture Sales Manager responsibility.

3. Choose **Quote Status Setup.**

   The Quote Status Setup window opens.

4. In the Quote Statuses region, select **Drafted.**

   The Allowed Transition to Status region is populated with the quote statuses that can be assigned to a quote of Drafted status.

5. In the Allowed Transition to Status region, select **Drafted** from a Code field's list of values (LOV) if it is not already listed in the region.
6. Click the Save icon in the toolbar to save the record.

2.4 Oracle Order Management and Oracle Pricing

Oracle HTML Quoting allows sales representatives to use pricing agreements to price quotes.

Pricing agreements are created in Oracle Order Management or Oracle Pricing. They set up the billing specifications that allow a quote to be priced. The attributes of a pricing agreement are price list, purchase order number, bill-to address, bill-to contact, invoicing terms, payment terms, and shipment terms. These attributes set up and apply default pricing rules in Oracle Order Management.

Each pricing agreement can have only one price list assigned to it, but one list can be linked to multiple agreements. You can create universal and customer-specific pricing agreements.

You can also set up promotion codes (also known as "offer codes") in Oracle Pricing. Sales representatives using Oracle HTML Quoting can enter these promotion codes to capture automatic discounts set up in the Oracle Pricing engine as available to request.

See *Oracle Pricing User's Guide* for more information.

3 Related Documentation

See the manuals listed below for more information relevant to implementing Oracle HTML Quoting:

- *Oracle HTML Quoting Concepts and Procedures, Release 11i*

  This document provides users with information on using Oracle HTML Quoting to create, manage, and personalize quotes for customers in a secure Web-based environment.

- *Oracle iStore Implementation Guide, Release 11i*

  This document provides users with information on implementing Oracle iStore, including procedures for setting up and customizing Oracle iStore, profile option descriptions, and API documentation.

- *Oracle iStore Concepts and Procedures, Release 11i*

  This document provides users with information on general principles and procedures for maintaining Web stores using Oracle iStore.

- *Oracle Inventory User's Guide, Release 11i*

  This document provides users with information on setting up products in Oracle Inventory.

- *Oracle Order Capture Implementation Guide, Release 11i*

  This document provides users with information on implementing Oracle Order Capture, including procedures for setting up quote statuses and status transitions.

- *Oracle Pricing User's Guide, Release 11i*

  This document provides users with information on setting up promotion codes, pricing agreements, and price lists in Oracle Pricing.

- *Oracle Applications System Administrator's Guide, Release 11i*

  This document provides users with information on creating responsibilities and other system administrator tasks in Oracle Applications.

- *Oracle CRM Foundation Implementation Guide, Release 11i*

  This document provides users with information on implementing Oracle CRM Foundation, including procedures for creating user roles and details about CRM resources.

- *Implementing Oracle CRM: ERP Functional Checklist*, available at http://metalink.oracle.com

  This document provides users with information on the functional flows of other Oracle Enterprise Resource Planning (ERP) Applications when integrated with Oracle Customer Relationship Management products.

- *Implementing Oracle CRM: Foundation Functional Checklist*, available at http://metalink.oracle.com

  This document provides users with information on the functional flows of other Oracle Foundation Applications when integrated with Oracle Customer Relationship Management products.

4 The Sales Representative Role and Permissions

The seeded Sales Representative role for Oracle HTML Quoting is IBE_SALESREP_ROLE. You can also create new Sales Representative roles for your sales representatives with any set of quote creation permissions that you specify.

See *Oracle CRM Foundation Implementation Guide* for more information about creating roles. See *Oracle iStore Implementation Guide* and *Oracle iStore Concepts and Procedures* for more information about the Oracle iStore quote creation permissions.

The Sales Representative role IBE_SALESREP_ROLE has all available quote creation permissions. It is appropriate for assignment to sales representatives and other employees of your organization. The following table describes the permissions for IBE_SALESREP_ROLE.

Table 1 Permissions for IBE_SALESREP_ROLE

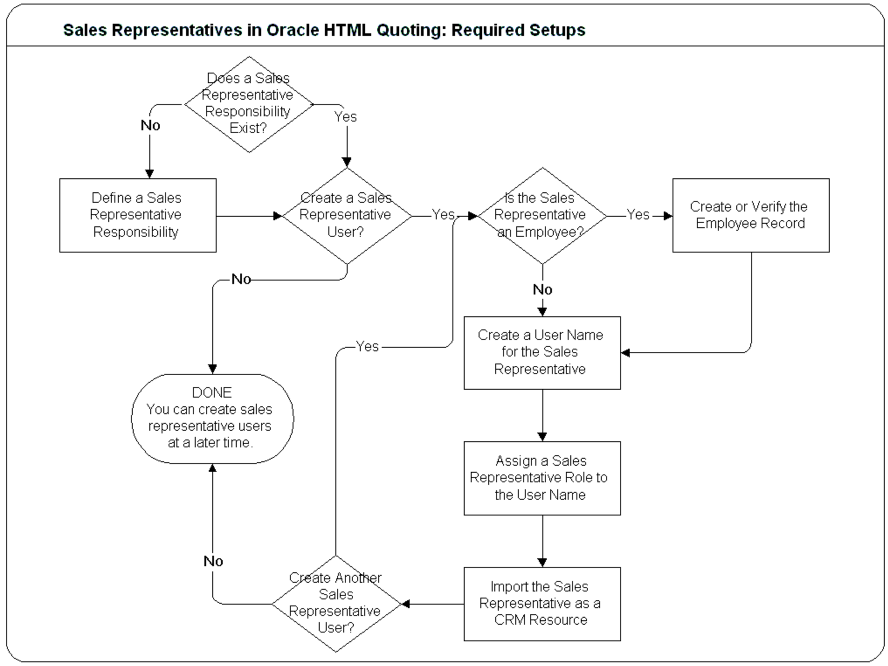
Name	Description
IBE_ALLOW_PRICE_OVERRIDE	Allows the user to override prices manually
IBE_ASSIGN_SALES_CREDITS	Allows a user to assign sales credits.
IBE_BILLTO_ANY_ACCOUNT	Allows a user to search on and retrieve all existing customers rather than only those with an existing billing relationship with the sold-to customer
IBE_CHANGE_BILLTO_CONTACT	Allows a user to change the bill-to contact from the default (if any) bill-to contact
IBE_CHANGE_BILLTO_CUSTOMER	Allows a user to change the bill-to customer from the default bill-to customer
IBE_CHANGE_SHIPTO_CONTACT	Allows a user to change the ship-to contact from the default (if any) ship-to contact
IBE_CHANGE_SHIPTO_CUSTOMER	Allows a user to change the ship-to customer from the default ship-to customer
IBE_CREATE_BILLTO_CONTACT	Allows the user to create a new contact for the bill-to customer who will have a bill-to relationship with the bill-to customer
IBE_CREATE_BILLTO_CONTACT_ADDRESS	Allows the user to create a new address associated with the bill-to contact which will have a bill-to relationship with the bill-to contact
IBE_CREATE_BILLTO_CUSTOMER	Allows a user to create a new customer with a billing relationship to the sold-to customer

Table 1 Permissions for IBE_SALESREP_ROLE (Cont.)

Name	Description
IBE_CREATE_BILLTO_CUSTOMER_ADDRESS	Allows the user to create a new address associated with the bill-to customer which will have a bill-to relationship with the bill-to customer
IBE_CREATE_ORDER	Allows a user to submit a quote or cart as an order
IBE_MODIFY_CART	Not used in Release 11*i*.
IBE_MODIFY_ORDER	Not used in Release 11*i*.
IBE_CREATE_SHIPTO_CONTACT	Allows the user to create a new contact for the ship-to customer who will have a ship-to relationship with the ship-to customer
IBE_CREATE_SHIPTO_CONTACT_ADDRESS	Allows the user to create a new address associated with the ship-to contact which will have a ship-to relationship with the ship-to contact
IBE_CREATE_SHIPTO_CUSTOMER	Allows a user to create a new customer with a shipping relationship to the sold-to customer
IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS	Allows the user to create a new address associated with the ship-to customer which will have a ship-to relationship with the ship-to customer
IBE_CREATE_SOLDTO_CUSTOMER	Allows a user to create a new customer in the context of assigning a sold-to customer during quote creation
IBE_SHIPTO_ANY_ACCOUNT	Allows a user to search on and retrieve all existing customers rather than only those with an existing shipping relationship with the sold-to customer
IBE_USE_ATTACHMENT	Allows the user to use attachments
IBE_USE_PRICING_AGREEMENT	Allows the user to use pricing agreements
IBE_VIEW_CUST_WITHOUT_ACCOUNT	Allows a user to search on and retrieve existing customers without an account

5 Process Flow for Required Sales Representative Setups

Follow the overall process flow illustrated in the following diagram to perform the required setups that are related to creating Oracle HTML Quoting sales representatives.



6 Defining a Sales Representative Responsibility

Before you can approve employees or other personnel as sales representatives, you must define at least one responsibility to assign to them. You can set up a structure of sales representative responsibilities that meets your business needs.

If you want some of your sales representatives to be able to sell all of your products, you can create a specialty store that contains every product listed in Oracle Inventory, then give them a responsibility that is supported by this specialty store and associated with the Master Inventory Organization.

You can associate different responsibilities with various operating units and specialty stores. In other words, you can set up specific sales representative responsibilities that allow a sales representative to create quotes only against a certain operating unit or within certain specialty stores.

For more information about creating responsibilities, see *Oracle Applications System Administrator's Guide, Release 11i.*

Use the following procedure to create a responsibility for sales representatives and associate it with an operating unit and at least one specialty store.

Steps

1. Launch Oracle Forms by navigating to:

   ```
   http://<host>:<apache port>/
   ```

   and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).

2. Log in with the System Administrator responsibility.
3. Choose **Security > Responsibility > Define.**

   The Responsibilities form opens.

4. Create a responsibility for an application, setting Data Group Name to **Standard,** Data Group Application to **iStore,** and Menu to **iStore Quotes Root Menu.**

   Note: Choose a clearly identifiable responsibility name.

   ---

5. Click the Save icon in the toolbar to save the record.
6. With your cursor in any field of the record, choose **Help > Diagnostics > Examine.**

   The Examine Field and Variable Values window opens.

7. In the Examine Field and Variable Values window, choose **APPLICATION_ID** in the Field LOV.

   The Value field in the Examine Field and Variable Values window is populated with the value of APPLICATION_ID. Note this value.

8. In the Examine Field and Variable Values window, choose **RESPONSIBILITY_ID** in the Field LOV.

   The Value field in the Examine Field and Variable Values window is populated with the value of RESPONSIBILITY_ID. Note this value.

9. From the Navigator - System Administrator window, choose **Profile > System.**

   The Find System Profile Values window opens.

10. Check **Site, Application,** and **Responsibility.** Use the Application LOV to choose **CRM Foundation.** Use the Responsibility LOV to choose **CRM Resource Manager.**
11. In the Profile field, enter `MO: Operating Unit`.
12. Click **Find.**

    The System Profile Values form opens with the results of your search.
13. Note the value of the profile MO: Operating Unit at the CRM Resource Manager responsibility level. Optionally, you can change it.

    If the profile is not set at this level, note its value at the CRM Foundation application level. Optionally, you can change it.

    If the profile is not set at this level, note its value at the site level. Optionally, you can change it.
14. Choose **View > Find.**

    The Find System Profile Values window opens.
15. Check **Responsibility,** and use the Responsibility LOV to search for and enter the name of the sales representative responsibility.
16. In the Profile field, enter `MO: Operating Unit`.
17. Click **Find.**

    The System Profile Values form opens with the results of your search.
18. Set the profile MO: Operating Unit at the responsibility level to the operating unit that is the value of the profile MO: Operating Unit at the CRM Resource Manager responsibility/CRM Foundation application/site level.
19. Click the Save icon in the toolbar to save the record.
20. Launch the Oracle iStore Merchant UI by logging in to the Oracle CRM Applications login page at:

    ```
    http://<host>:<apache port>/OA_HTML/jtflogin.jsp
    ```

    with a user name that has the default responsibility IBE_ADMINISTRATOR and the default application iStore. (In other words, the user's JTF_PROFILE_DEFAULT_RESPONSIBILITY profile option is set to 21819, and the user's JTF_PROFILE_DEFAULT_APPLICATION profile option is set to 671).
21. In the Setup tab, click on the name link of the specialty store to which you want to assign the responsibility.

    The Specialty Store Detail page opens.

22. Click **Supported Responsibilities.**

    The Supported Responsibilities page opens.

23. Click **Add Responsibility.**

    The Select Responsibility pop-up window opens.

24. In the Select Responsibility pop-up window, search for the sales representative responsibility that you want this specialty store to support by application and responsibility name, key, or description. Check the Select checkbox next to the responsibility, and click **Add.** When you are finished, click **Done.**

25. In the Supported Responsibilities page, click **Update** to save your changes.

You can now assign this responsibility to employees and other personnel so that they can create quotes against the operating unit in the specialty stores that support the responsibility.

7 Setting Up Sales Representatives

You must perform the following tasks to set up each of your sales representatives:

Steps

1. Creating a User Name for a Sales Representative
2. Assigning a Sales Representative Role
3. Importing a CRM Resource

If you are setting up an employee as a sales representative, you must first create a record of the employee before proceeding with these tasks. See Section 7.1, "Creating an Employee Record" for more information.

7.1 Creating an Employee Record

There must be a record of your employee in Oracle Human Resources before you set him or her up as a sales representative.

Use the following procedure to verify or create a record of your employee.

Steps

1. Launch Oracle Forms by navigating to:

   ```
   http://<host>:<apache port>/
   ```

   and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).

2. Log in with the Human Resources responsibility.

3. Choose **People > Enter and Maintain.**

   The Find Person window opens.

4. In the Find Person window, enter the search criteria for the employee and click **Find.**

5. If a record of the employee exists, the People form opens with the record.

   Note the employee’s number.

6. If a record of the employee does not exist, proceed through these steps to create a record:

   a. In the Find Person window, click **New** to create an employee’s record.

      A blank People form opens.

   b. In the People form, enter at least the employee’s Last Name, Social Security Number, and Birth Date.

   c. Place your cursor in the Type field and click the LOV button.

      The Person Types window opens.

   d. Highlight **Employee** and click **OK.**

   e. Click the Save icon in the toolbar to save this employee’s record.

   f. Note the employee’s number.

7.2 Creating a User Name for a Sales Representative

For each sales representative, you must create an Oracle HTML Quoting user name and password, assign responsibilities to the user name, and set up its profile options.

Use the following procedure to set up an Oracle HTML Quoting user name for a sales representative.

Prerequisites

You have defined a responsibility for sales representatives and noted its APPLICATION_ID and RESPONSIBILITY_ID. See Section 6, "Defining a Sales Representative Responsibility" for more information.

If you are setting up an Oracle HTML Quoting user name for an employee, a record of the employee must exist in Oracle Human Resources. See Section 7.1, "Creating an Employee Record" for more information.

Steps

1. Launch Oracle Forms by navigating to:

   ```
   http://<host>:<apache port>/
   ```

   and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).

2. Log in with the System Administrator responsibility.

3. Choose **Security > User > Define.**

   The Users window opens.

4. In the User Name field, enter the user name that the sales representative will use to log in to Oracle HTML Quoting.

5. In the Password field, enter the sales representative's password.

6. Place your cursor in the Person field or Customer field, depending on the resource category of the sales representative:

   - If the sales representative is an employee, choose the Person field.
   - If the sales representative is not an employee, choose the Customer field.

7. Use the LOV to search for and select the sales representative.

8. In the Responsibilities block, use the LOV button in a Responsibility field to assign a sales representative responsibility to the user name.

9. Click the Save icon in the toolbar to save this user record.

10. From the Navigator - System Administrator window, choose **Profile > System.**

    The Find System Profile Values window opens.

11. Check the checkbox next to the User field, and use the LOV to search for and enter the sales representative's user name.

12. In the Profile field, enter `JTF_PROFILE%`.

13. Click **Find.**

    The System Profile Values form opens with the results of your search.

14. Set the profile option JTF_PROFILE_DEFAULT_APPLICATION at the user level to the APPLICATION_ID value of the user name's sales representative responsibility.

15. Set the profile option JTF_PROFILE_DEFAULT_RESPONSIBILITY at the user level to the RESPONSIBILITY_ID value of the user name's sales representative responsibility.

16. Click the Save icon in the toolbar to save the records.

Guidelines

When assigning responsibilities to a sales representative, choose responsibilities that are associated with the operating units and specialty stores for which he or she should create quotes. If you want the sales representative to create quotes for all operating units, assign a responsibility that is associated with an operating unit linked to the Master Inventory Organization. See *Oracle iStore Implementation Guide* for more information about defining the Master Inventory Organization in Oracle Inventory and associating responsibilities with operating units.

7.3 Assigning a Sales Representative Role

You must assign a Sales Representative role to the sales representative's user name.

Use the following procedure to assign a Sales Representative role to a sales representative's user name.

Prerequisites

A user name for the sales representative exists. See Section 7.2, "Creating a User Name for a Sales Representative" for more information.

Steps

1. Log in as SYSADMIN to the Oracle CRM Applications login page at:

   ```
   http://<host>:<apache port>/OA_HTML/jtflogin.jsp
   ```

2. In the Users tab, choose **User Name** from the Find Users pull-down menu, enter the sales representative's user name in the adjacent text field, and click **Go.**

   The Users page displays the sales representative's user name in the search results.

3. Click on the user name link.

   The User Details page for the user name opens.

4. Click **Roles.**

   The User Role Mapping page opens.

5. Highlight **IBE_SALESREP_ROLE** (or another Sales Representative role that you have created) in the Available Roles list and click the ">" button to move it to the Assigned Roles list.

6. Click **Update** to save this role assignment.

7.4 Importing a CRM Resource

You must set up a sales representative as a CRM Resource, with a salesperson number and sales credit type, after assigning to him or her an Oracle HTML Quoting user name and a Sales Representative role.

You can import a resource into the Oracle CRM Foundation Resource Manager from different application databases depending on the resource type you choose. After selecting a resource based on its type, you identify its role and eligibility dates before saving it to Resource Manager as a CRM Resource.

Use the following procedure to set up a sales representative as a CRM Resource.

Prerequisites

If you are importing an employee as a resource, a record of the employee must exist in Oracle Human Resources, and you should know the employee's number. See Section 7.1, "Creating an Employee Record" for more information.

A user name for the sales representative exists, and you have assigned a Sales Representative role to it. See Section 7.2, "Creating a User Name for a

Sales Representative" and Section 7.3, "Assigning a Sales Representative Role" for more information.

Steps

1. Launch Oracle Forms by navigating to:

   ```
   http://<host>:<apache port>/
   ```

   and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).

2. Log in with the CRM Resource Manager responsibility.

3. Choose **Maintain Resources > Import Resources.**

   The Selection Criterion window opens.

4. Choose **Employee, Partner, Supplier Contact, Party,** or another category from the Resource Category pull-down menu, as appropriate to the sales representative.

5. Optional: Enter other search criteria.

6. Optional: If you are importing an employee resource, in the Number field, enter the employee number you noted when viewing or creating the employee's record.

7. Click **Search.**

   The search results appear in the Search Results region of the Selection Criterion window.

8. Check the Select checkbox next to the person or organization that you are setting up as a sales representative.

9. Click **Create Resource.**

   The Default Values window opens.

10. Optional: You can enter active dates, manager's name, and role information in this window.

11. Click **OK.**

    The Selected Resources window opens, showing the sales representative as a resource.

12. Check the Select checkbox next to the sales representative's resource record and click **Save Resource.**

    The sales representative is now saved as a CRM Resource.

13. Click **Details.**

The Resource form for the sales representative opens.

14. In the Salesperson Number field, enter an identifying number for the sales representative.
15. Click on the Receivables tab.
16. In the Sales Credit type field, use the LOV to assign a sales credit type to the sales representative.
17. Click the Save icon in the toolbar to save the record.

    The sales representative can now log in to Oracle HTML Quoting with his or her user name and create quotes.

8 Limiting the Available Countries

When sales representatives search for and create customers, contacts, and addresses, they use a Country pull-down menu to select the country of the customer, contact, or address.

By default, all countries are available in the Country pull-down menus.

If necessary, you can limit the countries that appear in these menus.

8.1 Limiting Bill-To Countries

You can limit which countries appear in the Country pull-down menus for bill-to information, using the following procedure.

Steps

1. Launch Oracle Forms by navigating to:

    ```
    http://<host>:<apache port>/
    ```

    and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).
2. Log in with the Human Resources responsibility.
3. Choose **Work Structures > Organization > Description.**

    The Find Organization window opens.
4. In the Find Organization window, enter the search criteria for your merchant organization and click **Find.**

    The Organization form opens with the organization’s record.
5. In the Organization Classifications region, select **Operating Unit** in the Name fields.

6. Click **Others.**

   The Additional Organization Information window opens.

7. In the Additional Organization Information window, enter `%Country` in the Find field and click **Find.**

8. In the search results, choose **Bill to Country** and click **OK.**

   The Additional Organization Information window for Bill to Country opens.

9. Place your cursor in a Bill to Country field.

   The Bill to Country window opens.

10. Add countries to the Additional Organization Information window for Bill to Country as follows:

    a. In the Bill to Country window, click the Bill to Country LOV button.

       The Bill to Country search window opens.

    b. Search for a country, highlight it, and click **OK.**

       The Bill to Country field in the Bill to Country window is populated with the value of this country.

    c. Click **OK** to add the country to the Additional Organization Information window for Bill to Country.

    d. Repeat for each country that you want to add to the sales representatives' bill-to Country pull-down menus.

11. When you are finished adding countries, click **OK** in the Additional Organization Information window for Bill to Country.

    You return to the Organization form with the organization's record.

8.2 Limiting Ship-To Countries

You can limit which countries appear in the Country pull-down menus for ship-to information, using the following procedure.

Steps

1. Launch Oracle Forms by navigating to:

   ```
   http://<host>:<apache port>/
   ```

   and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).

2. Log in with the Human Resources responsibility.
3. Choose **Work Structures > Organization > Description.**

   The Find Organization window opens.
4. In the Find Organization window, enter the search criteria for your merchant organization and click **Find.**

   The Organization form opens with the organization's record.
5. In the Organization Classifications region, select **Operating Unit** in the Name fields.
6. Click **Others.**

   The Additional Organization Information window opens.
7. In the Additional Organization Information window, enter `%Country` in the Find field and click **Find.**
8. In the search results, choose **Ship to Country** and click **OK.**

   The Additional Organization Information window for Ship to Country opens.
9. Place your cursor in a Ship to Country field.

   The Ship to Country window opens.
10. Add countries to the Additional Organization Information window for Ship to Country as follows:
    a. In the Ship to Country window, click the Ship to Country LOV button.

       The Ship to Country search window opens.
    b. Search for a country, highlight it, and click **OK.**

       The Ship to Country field in the Ship to Country window is populated with the value of this country.
    c. Click **OK** to add the country to the Additional Organization Information window for Ship to Country.
    d. Repeat for each country that you want to add to the sales representatives' ship-to Country pull-down menus.
11. When you are finished adding countries, click **OK** in the Additional Organization Information window for Ship to Country.

    You return to the Organization form with the organization's record.

9 Profile Options

When implementing Oracle HTML Quoting, you must set certain Oracle iStore (IBE) profile options.

> **Note:** The settings of the IBE profile options affect both the Oracle HTML Quoting user interface and the Oracle iStore customer user interface.

Use the following procedure to set IBE profile options. See *Oracle iStore Implementation Guide* for more information about these profile options.

Steps

1. Launch Oracle Forms by navigating to:

   ```
   http://<host>:<apache port>/
   ```

   and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).

2. Log in as SYSADMIN.
3. Choose the System Administrator responsibility.
4. Go to **Profile > System.**

   The Find System Profile Values window opens.

5. Check **Application,** and choose **iStore.**
6. In the Profile field, enter **IBE%**, and click **Find.**
7. Verify and/or set the iStore (IBE) profile options listed below at the application level only, unless another level is specified.

   The IBE profile options are summarized in the following tables, categorized according to the aspect of Oracle HTML Quoting that they impact: Search, Pricing, Quotes, and Functionality.

Table 2 IBE Profile Options for Oracle HTML Quoting Search

Name	Description
IBE: Enable Fuzzy Search	If the profile is set to **Yes,** the application allows users to perform fuzzy product searches, so that they do not have to type in the exact spelling of their search criteria to retrieve results that match these criteria. If the profile is not set, it defaults to value **No.**
IBE: No of Results in Search	This profile specifies the number of hits returned by a store search. It defaults to value 200 if not set.
IBE: Search Lines Per Page	This profile specifies the number of quotes displayed on a single quote listing page for users with a Sales Representatives role. It defaults to value 20 if not set.
IBE: Use Category Search	This profile specifies whether Oracle HTML Quoting allows sales representatives to search for products by category or minisite section. **Yes** activates Category search so that the advanced search pull-down menu shows categories with publishable items. **No** activates Section search so that the advanced search pull-down menu shows top level sections for the minisite where the sales representative is creating a quote. Null value removes the advanced search pull-down menu so that search is only enabled in all products. You must set this profile option to **Yes** if the IBE: Use CABO UI profile option is set to **No.**

Table 3 IBE Profile Options for Oracle HTML Quoting Pricing

Name	Description
IBE: Use Price list associated with Specialty Store	If the profile is set to **Yes**, the price list at the specialty store is used for registered and B2B customers. If the profile is set to **No,** Oracle HTML Quoting passes a null price list with the party ID and account ID to the Pricing engine, which then determines a price list for which the customer qualifies. If the profile is not set, it defaults to value **Yes.**
IBE: Pricing Event — Before Shopping Cart	This profile specifies the user-defined pricing event (defined in Pricing) for the catalog stage. Recommended value: **Enter Order Line**
IBE: Pricing Event for Shopping Cart	The merchant can choose any user-defined pricing event for processing the price for the shopping cart. These user-defined pricing events should first be created in Pricing. Recommended value: **Enter Order Line**

Table 3   IBE Profile Options for Oracle HTML Quoting Pricing (Cont.)

Name	Description
IBE: Recalculate Price in Order Management	If the profile is set to **No,** the quote-related prices are passed on to Order Management unchanged. If the profile is set to **Yes,** the quote-related prices can be changed in the order because Order Management is allowed to recalculate the prices for the quote. If the profile is not set, it defaults to value **No.**
IBE: Request Type to get a Price	Select the transaction application (e.g., Order Management) that calls the Pricing engine.

Table 4   IBE Profile Options for Oracle HTML Quoting Quotes

Name	Description
IBE: Shopping Cart Expiration Duration	This profile specifies the number of days that quotes are available to the merchant and customer. If the profile is not set, it defaults to value 0.
IBE: Authorize Payment Offline during normal Checkout	This profile specifies if payment authorization offline before checkout is allowed. **Yes** enables offline authorization. **No** allows only online authorization. If the profile is not set, it defaults to value **Yes.**
IBE: Create Order in Entered State, if it has errors while booking	This profile specifies if the order should be created in the Entered state even if there are errors while booking it. If the profile is not set, it defaults to value **No.**
IBE: Default Payment Term	This profile specifies the default payment term. If the profile is not set, the option is ignored.
IBE: Merge Shopping Cart Lines	This profile specifies whether to merge item lines in the quote if the same item is added to the quote more than once. If the profile is not set, it defaults to value **No.**

Table 5   IBE Profile Options for Oracle HTML Quoting Functionality

Name	Description
IBE: Use Line Types	This profile specifies whether sales representatives can modify line types for items in quotes. A sales representative marks an item as a trade-in by setting its line type to **Return,** so this profile's value determines whether Oracle HTML Quoting's trade-in functionality is available. **Yes** enables line type changes and consequently trade-in functionality. **No** disables line type changes and trade-in functionality. If the profile is not set, it defaults to value **No.**

Table 5 IBE Profile Options for Oracle HTML Quoting Functionality (Cont.)

Name	Description
IBE: Use Notes	This profile specifies whether to turn on the Notes functionality in Oracle HTML Quoting. **Yes** activates the Notes functionality. **No** deactivates it. The default value is **No.** Oracle Sales Online must be installed before the Notes functionality can be activated.
IBE: Use Tasks	This profile specifies whether to turn on the Tasks functionality in Oracle HTML Quoting. **Yes** activates the Tasks functionality. **No** deactivates it. The default value is **No.** Oracle Sales Online must be installed before the Tasks functionality can be activated.

10 Documentation Accessibility

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