

Oracle® HTML Quoting

Concepts and Procedures

Release 11*i*

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Preface

This preface covers general information about Oracle HTML Quoting and describes the intended audience for this document as well as related documentation.

Introduction to Oracle HTML Quoting

Oracle HTML Quoting is an electronic commerce application which provides a Web-based interface for assisted selling of products and services to customers and business partners. Oracle HTML Quoting enables the easy creation, management and personalization of customer quotes in a secure environment. With seamless integration to Oracle Enterprise Resource Planning (ERP) Applications and other Oracle Customer Relationship Management (CRM) Applications, Oracle HTML Quoting enables companies to provide optimum customer service during the campaign and sales processes.

Intended Audience

This guide is aimed at the following users:

- Sales Representatives
- Sales Managers
- Resellers

This guide assumes you have the following prerequisites:

- Understanding of the company business processes
- Knowledge of products and services as defined by your marketing policies

Related Documents

- *Oracle HTML Quoting Implementation Guide, Release 11i*
This document provides users with information on implementing Oracle HTML Quoting, including procedures for setting up sales representatives to use the application, and descriptions of Oracle HTML Quoting's integration with other Oracle applications.
- *Oracle Sales Online Concepts and Procedures, Release 11i*
This document provides users with information on using Oracle Sales Online, including procedures for using the Notes and Tasks functionalities.

Conventions

This manual uses the typographic conventions listed in the following table:

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

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Understanding Oracle HTML Quoting

This chapter describes the concepts that you need to understand to use Oracle HTML Quoting effectively.

- [Overview of Understanding Oracle HTML Quoting](#)
- [The Sales Representative Roles](#)
- [Quote Statuses](#)
- [Process Flows](#)

1.1 Overview of Understanding Oracle HTML Quoting

Oracle HTML Quoting provides a Web-based interface for you to create quotes and place orders for your customers. Sales representatives in Oracle HTML Quoting can have a variety of permissions, such as the ability to submit a quote as an order or to create new customers. Your permissions are determined by your system administrator or sales manager.

Note: The procedures in this manual assume that you have the permissions necessary to perform them.

As a sales representative, you build quotes for customers by leveraging a shopping cart-type functionality in an environment similar to a Web store. In Oracle HTML Quoting, the object that is referred to as a quote can also be considered a Web store shopping cart for B2B and B2C customers, if the environment where the quote is created is available to the customers in a Web store.

Your two main possible work flows are campaign-to-order and quote-to-order.

Campaign to order: You begin in Oracle Sales Online (OSO) to fulfill the campaign to opportunity work flow. To create a quote as part of a sales campaign or to conclude a campaign, you must switch to Oracle HTML Quoting by clicking on the Quotes tab in OSO. You then create a quote within Oracle HTML Quoting, and submit the quote as an order if you have the permission to do so.

Quote to order: You reside entirely in Oracle HTML Quoting and create quotes for customers. You can also submit the quote as an order if you have the permission to do so.

1.2 The Sales Representative Roles

Oracle HTML Quoting has Sales Representative user roles that your system administrator or sales manager assigns to you when he or she sets you up as a sales representative for your organization.

With a Sales Representative user role, you can create quotes on behalf of customers and, if you have the required permissions, modify the quotes and submit them as orders.

When you log in to Oracle HTML Quoting, your home page is a default listing of quotes created by yourself and filtered by certain criteria, such as quote status. See

[Section 2.2, "The Quote Listing Page"](#) for more information about the Quote Listing page.

1.3 Quote Statuses

You must have a basic understanding of quote statuses before creating quotes. This section summarizes essential information about quote statuses.

A quote goes through various stages from its initial preparation to its submission as an order. These stages include preparation of the draft, submission to the customer, revision based on customer feedback, and conversion into an order or archiving as an unsuccessful or unused quote. The three default quote statuses available with Oracle HTML Quoting are Drafted, Ordered, and Inactive.

Drafted: The quote status Drafted is the default quote status automatically given by Oracle HTML Quoting to every new quote, whether it was created as entirely new or as a copy of another quote. All quoting actions are allowed on quotes with the status Drafted, subject to the sales representative's permissions and the change restriction settings in Oracle HTML Quoting. The quoting actions include copying to a new quote, appending to an existing quote, appending from an existing quote, modifying the quote, creating a new version, printing, checking out, and submitting as an order.

Inactive: If a quote will not be converted to an order, you can manually change its status to Inactive. This is the only status change that you can make. A quote can be inactivated from the Quote Listing page or the version history. When a quote is inactivated, all versions of the same quote, except for those with a status of Ordered, will change to Inactive as well. A quote with Inactive status is read-only. The only quoting actions allowed on quotes with the status Inactive are copying to a new quote, and appending to an existing quote.

Ordered: If a certain version of a quote is submitted as an order, Oracle HTML Quoting will automatically change only that version's status to Ordered. A quote with Ordered status is read-only. The only quoting actions allowed on quotes with the status Ordered are copying to a new quote, and appending to an existing quote.

1.4 Process Flows

You can perform some or all of the following tasks, depending on the permissions that your Oracle HTML Quoting system administrator or sales manager has assigned to you:

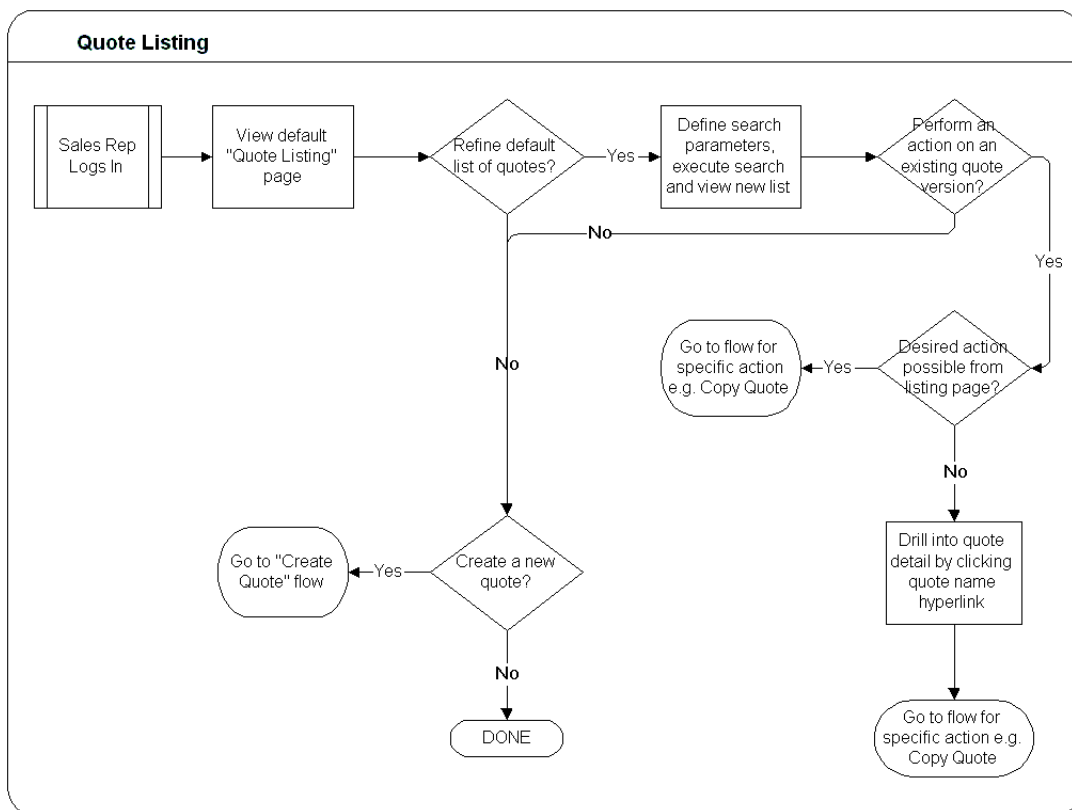
- View and search for quotes
- Create quotes
- Modify quotes
- Copy quotes
- Append quotes
- Enter shipping information for quotes
- Enter billing information for quotes
- Place quotes into orders

This section addresses the overall process flows that you follow to complete these tasks.

Your system administrator or sales manager can tell you what quote creation permissions, such as the ability to create a sold-to customer record or place an order, he or she has granted to you, as well as the specialty stores and operating units in which you can create quotes.

1.4.1 Process Flow for Viewing and Searching for Quotes

You follow the overall process flow illustrated in the following diagram when viewing and searching for a quote.



When you log in to Oracle HTML Quoting, the Quote Listing page opens with a default list of quotes. Here, you can decide whether to refine the list of quotes.

If you decide to refine the quote list, you can define the search parameters, execute a search, and view the results.

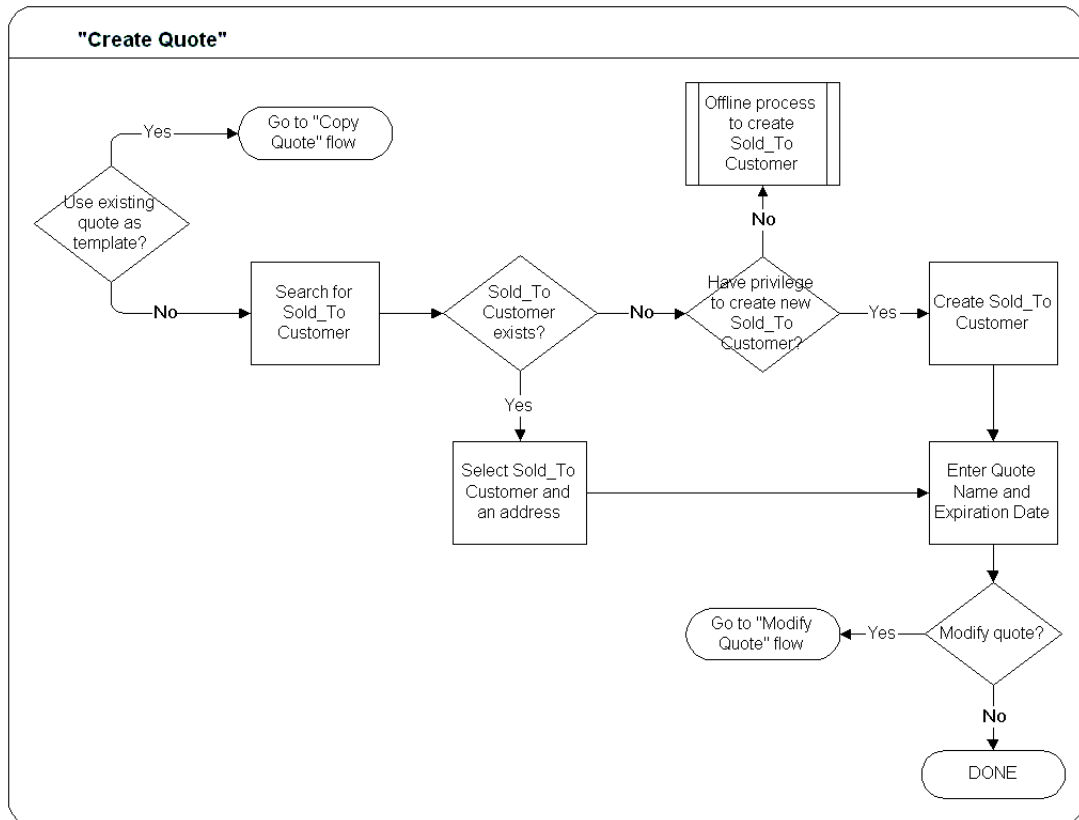
From the default list of quotes or the search results, you can decide to initiate an action on an existing quote version either from the listing page or from the quote detail, which is available by clicking the quote name hyperlink. When you initiate an action on an existing quote version, you enter the process flow for that action.

Possible actions include modifying, copying, appending, inactivating, and viewing more versions of a quote.

From the default list of quotes or the search results, you can also decide to create a new quote. You then enter the process flow for creating a quote in Oracle HTML Quoting.

1.4.2 Process Flow for Creating a Quote

You follow the overall process flow illustrated in the following diagram when creating a quote in Oracle HTML Quoting.



When creating a quote, you first decide whether to use an existing quote as a template. If you decide to do so, you enter the process flow for copying a quote.

If you decide to create an entirely new quote instead, you first search for a sold-to customer. If the sold-to customer does not exist, you can create the sold-to customer if you have the requisite permission. If you do not have this permission, there must be an offline process to create the sold-to customer.

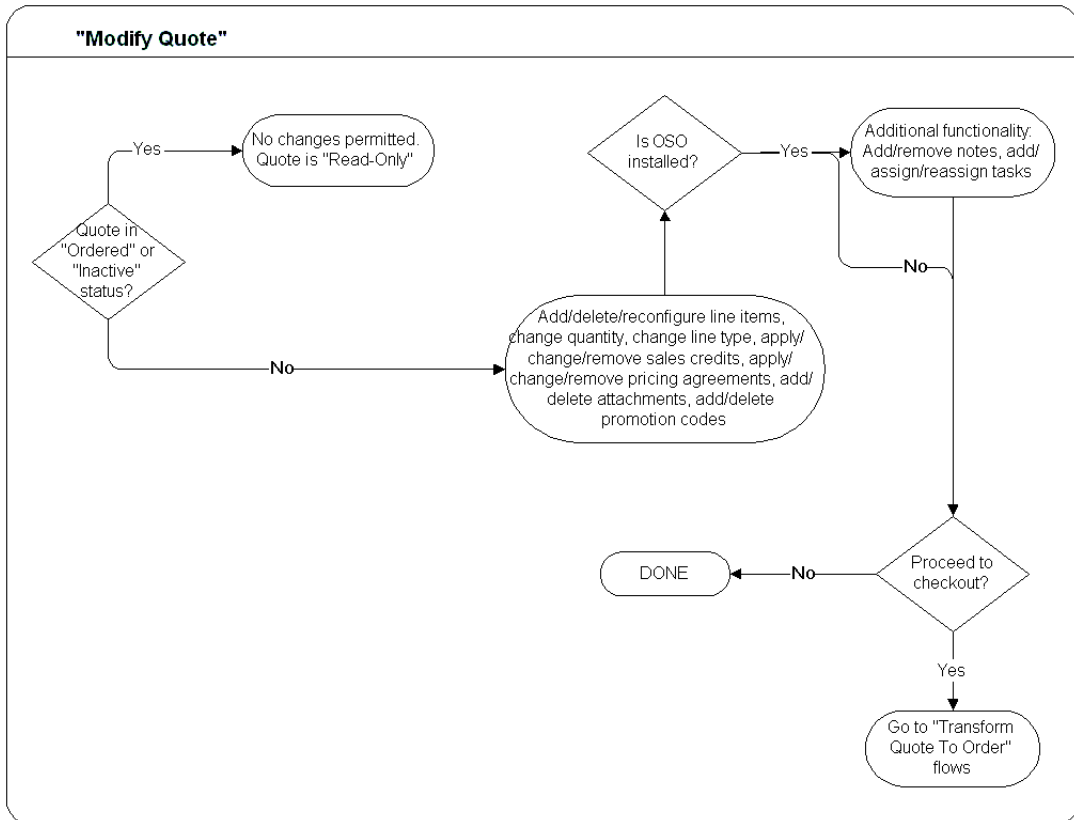
If the sold-to customer exists, you select the sold-to customer, and usually an address too.

After selecting or creating a sold-to customer, you enter the quote name and expiration date.

To create the quote details, you enter the process flow for modifying a quote.

1.4.3 Process Flow for Modifying a Quote

You follow the overall process flow illustrated in the following diagram when modifying a quote.



You can modify one of your quote versions if the quote does not have a status of Ordered or Inactive, and if you have the requisite permissions.

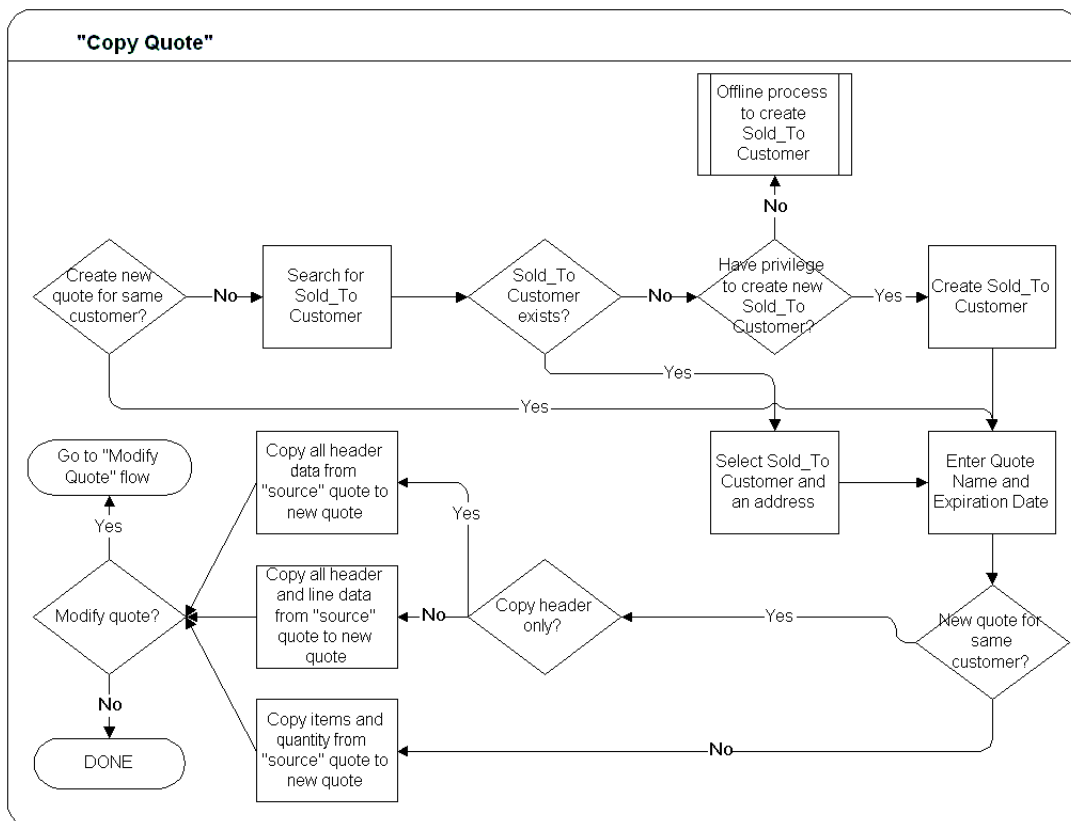
Possible updates to a quote version include changes in line items, quantities, line types, sales credits, pricing agreements, attachments, and promotion codes.

If OSO is installed, you can also add or remove notes, and add, assign, or reassign tasks, assuming you have the requisite permissions.

After you have finished making changes to the quote, you can proceed to checkout. If you proceed to checkout with the quote, you enter the process flow for transforming a quote to an order.

1.4.4 Process Flow for Copying a Quote

You follow the overall process flow illustrated in the following diagram when copying a quote.



When copying a quote, you first indicate whether you are creating the new quote for the same customer or a different one. If the new quote is for a different customer, you copy the line items and quantities from the source quote to the new quote. If

the new quote is for the same customer, you specify whether to copy only the header of the source quote or the entire quote, both header and line data.

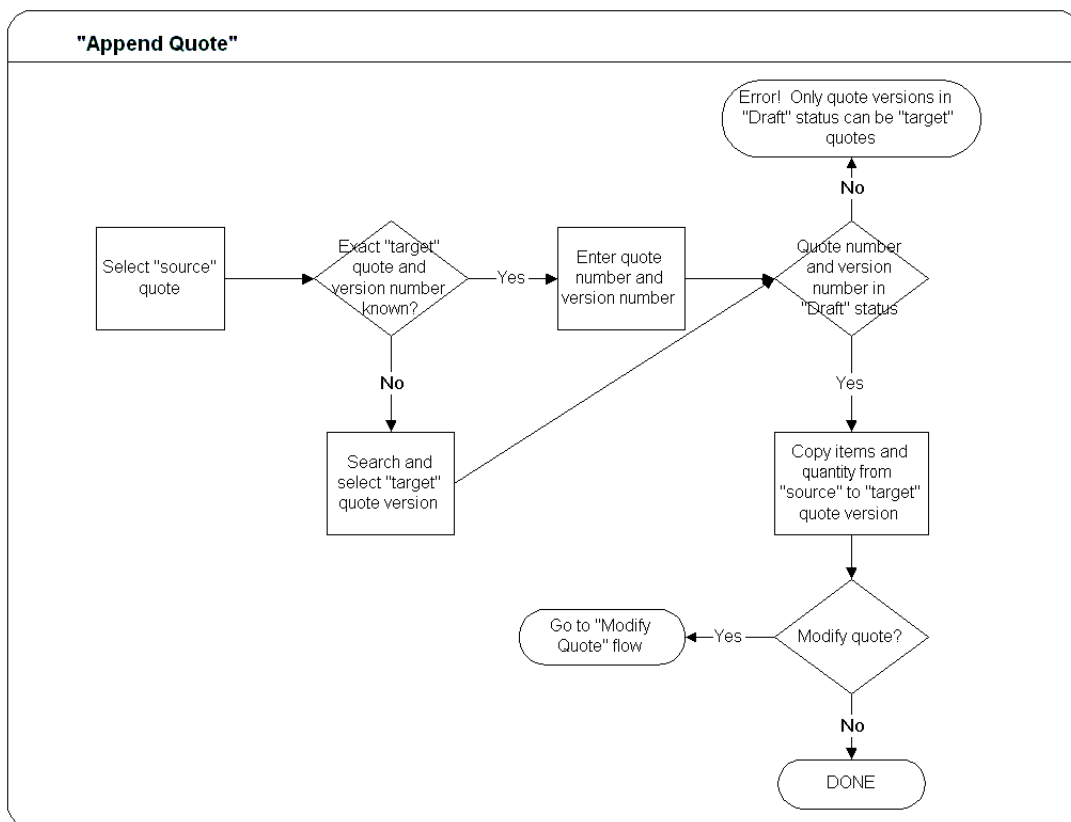
If the new quote is for a different customer, you then search for a sold-to customer. If the sold-to customer does not exist, you can create the sold-to customer if you have the requisite permission. If you do not have this permission, there must be an offline process to create the sold-to customer. If the sold-to customer exists, you select the sold-to customer and an address. After selecting or creating a sold-to customer, you enter the quote name.

If the new quote is for the same customer, you skip the steps for selection of a sold-to customer and proceed directly to entering the quote name and expiration date.

Oracle HTML Quoting creates the quote. If you choose to modify the quote further, you enter the process flow for modifying a quote.

1.4.5 Process Flow for Appending a Quote

You follow the overall process flow illustrated in the following diagram when appending a quote to another quote.



When you want to append line items from one quote to another, you first select the source quote and click **Append**.

Next, you select the target quote either by entering the quote number and version number, or by searching for the quote version.

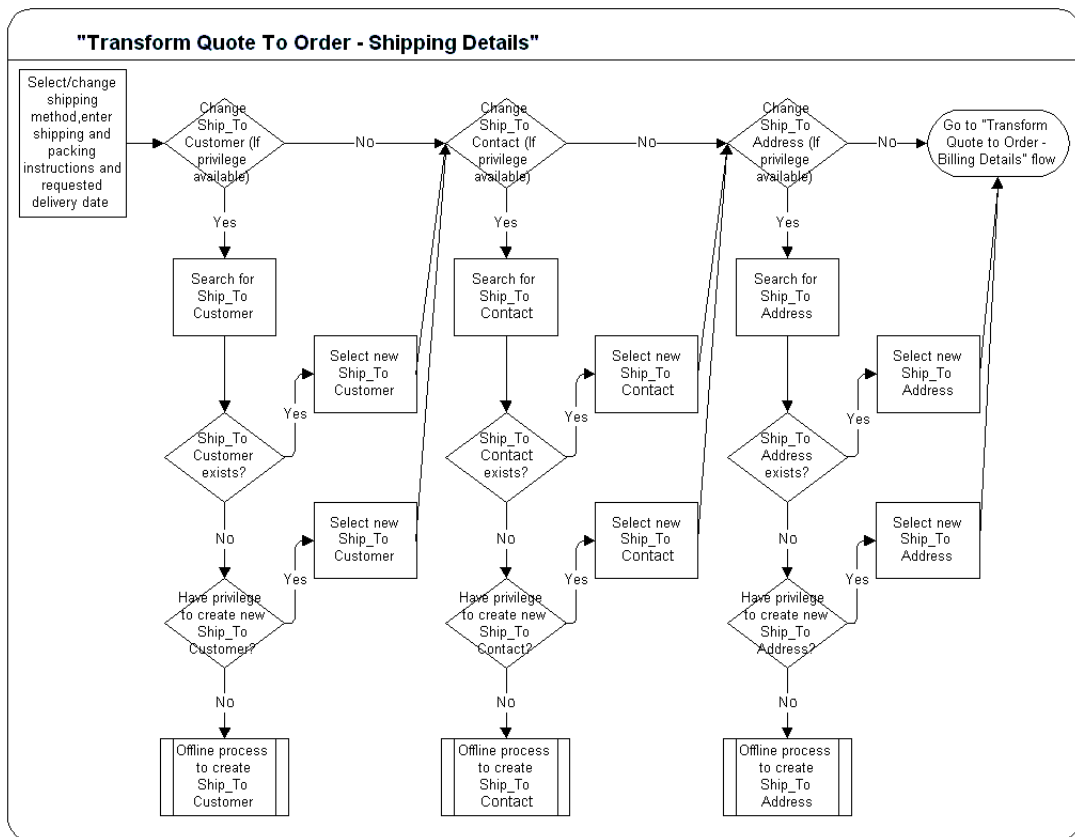
Oracle HTML Quoting checks if the target quote is in the Drafted status. If the target quote is not in Drafted status, then you cannot append another quote to it.

If the target quote is in Drafted status, then Oracle HTML Quoting copies the line items and quantities from the source quote to the target quote.

If you choose to modify the target quote further, you enter the process flow for modifying a quote.

1.4.6 Process Flow for Transforming a Quote to an Order—Shipping Details

You follow the overall process flow illustrated in the following diagram when entering shipping details while transforming a quote to an order.



When you transform a quote to an order, you first select the shipping method, enter shipping and packing instructions, and specify the requested delivery date.

Next, you choose the ship-to customer. By default, Oracle HTML Quoting selects the sold-to customer as the ship-to customer. You can change the ship-to customer if you have the requisite permission. You first search for the ship-to customer and select the new ship-to customer from the search results. If a record of the ship-to customer does not exist, you can create a record if you have the requisite permission. If you do not have this permission, there must be an offline process to create the ship-to customer's record.

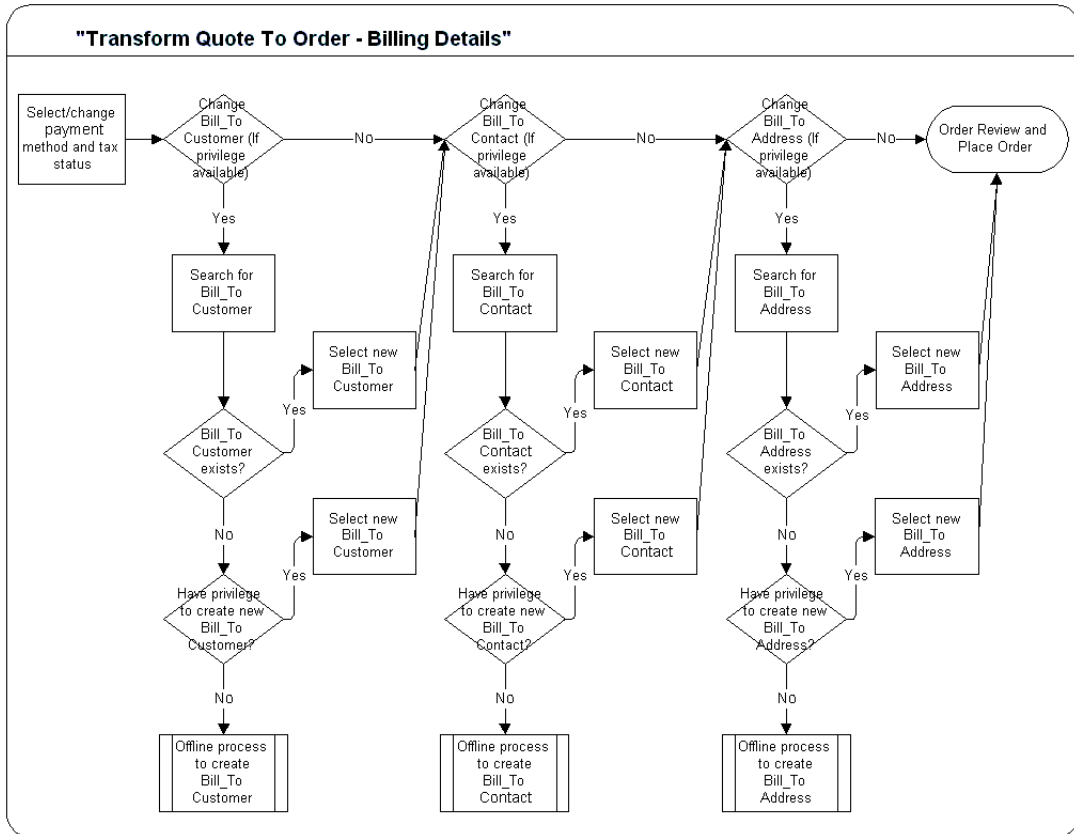
After selecting or creating a ship-to customer, you choose the ship-to contact. By default, Oracle HTML Quoting selects the sold-to contact as the ship-to contact. You can change the ship-to contact if you have the requisite permission. You first search for the ship-to contact and select the new ship-to contact from the search results. If a record of the ship-to contact does not exist, you can create a record if you have the requisite permission. If you do not have this permission, there must be an offline process to create the ship-to contact's record.

After selecting or creating a ship-to contact, you choose the ship-to address. By default, Oracle HTML Quoting selects the address, if any, that you chose when selecting the sold-to customer, as the ship-to address. You can change the ship-to address if you have the requisite permission. You first search for the ship-to address and select the new ship-to address from the search results. If a record of the ship-to address does not exist, you can create a record if you have the requisite permission. If you do not have this permission, there must be an offline process to create the ship-to address record.

After selecting or creating a ship-to address, you enter the process flow for transforming a quote to an order with billing details.

1.4.7 Process Flow for Transforming a Quote to an Order—Billing Details

You follow the overall process flow illustrated in the following diagram when entering billing details while transforming a quote to an order.



After entering the shipping details for a quote, you select the payment method and tax status.

Next, you choose the bill-to customer. By default, Oracle HTML Quoting selects the sold-to customer as the bill-to customer. You can change the bill-to customer if you have the requisite permission. You first search for the bill-to customer and select the new bill-to customer from the search results. If a record of the bill-to customer does not exist, you can create a record if you have the requisite permission. If you do not

have this permission, there must be an offline process to create the bill-to customer's record.

After selecting or creating a bill-to customer, you choose the bill-to contact. By default, Oracle HTML Quoting selects the sold-to contact as the bill-to contact. You can change the bill-to contact if you have the requisite permission. You first search for the bill-to contact and select the new bill-to contact from the search results. If a record of the bill-to contact does not exist, you can create a record if you have the requisite permission. If you do not have this permission, there must be an offline process to create the bill-to contact's record.

After selecting or creating a bill-to contact, you choose the bill-to address. By default, Oracle HTML Quoting selects the address, if any, that you chose when selecting the sold-to customer, as the bill-to address. You can change the bill-to address if you have the requisite permission. You first search for the bill-to address and select the new bill-to address from the search results. If a record of the bill-to address does not exist, you can create a record if you have the requisite permission. If you do not have this permission, there must be an offline process to create the bill-to address record.

After selecting or creating a bill-to address, you review the quote and place it as an order.

Using Oracle HTML Quoting

This chapter describes the Oracle HTML Quoting functions and user interface, and procedures for sales representatives and other personnel to create and subsequently modify quotes.

- [Overview of Using Oracle HTML Quoting](#)
- [The Quote Listing Page](#)
- [Viewing Quotes](#)
- [Creating Quotes](#)
- [Copying Quotes](#)
- [Appending Quotes](#)
- [Creating and Viewing Quote Versions](#)
- [Inactivating Quotes](#)
- [Printing Quotes](#)
- [Transforming Quotes to Orders](#)
- [Creating Customers](#)

2.1 Overview of Using Oracle HTML Quoting

Use Oracle HTML Quoting to build quotes and place orders for your customers. Your access to Oracle HTML Quoting functionality depends on the permissions that your system administrator or sales manager has assigned to you.

Note: The procedures in this chapter assume that you have the permissions necessary to perform them.

Your permissions can include any or all of the following tasks:

- Search on and retrieve all existing customers rather than only those with an existing billing relationship with the sold-to customer
- Change the bill-to contact from the default (if any) bill-to contact
- Change the bill-to customer from the default bill-to customer
- Change the ship-to contact from the default (if any) ship-to contact
- Change the ship-to customer from the default ship-to customer
- Create a new contact for the bill-to customer who will have a bill-to relationship with the bill-to customer
- Create a new address associated with the bill-to contact which will have a bill-to relationship with the bill-to contact
- Create a new customer with a billing relationship to the sold-to customer
- Create a new address associated with the bill-to customer which will have a bill-to relationship with the bill-to customer
- Submit a quote as an order
- Create a new contact for the ship-to customer who will have a ship-to relationship with the ship-to customer
- Create a new address associated with the ship-to contact which will have a ship-to relationship with the ship-to contact
- Create a new customer with a shipping relationship to the sold-to customer
- Create a new address associated with the ship-to customer which will have a ship-to relationship with the ship-to customer
- Create a new customer in the context of assigning a sold-to customer during quote creation

- Override prices manually
- Search on and retrieve all existing customers rather than only those with an existing shipping relationship with the sold-to customer
- Use attachments
- Use pricing agreements
- Search on and retrieve existing customers without an account
- View invoices, related to the entire organization, through Order Tracker
- View orders, placed on behalf of the entire organization, through Order Tracker
- View payments, related to the entire organization, through Order Tracker

Your Quote Listing page in Oracle HTML Quoting serves as a dashboard from which you can perform these functions as a sales representative.

2.2 The Quote Listing Page

The Quote Listing page is your home page in Oracle HTML Quoting, from which you can create new quotes and access the quotes that belong to you. When you initially log in, it displays a list of the highest versions of your most recently modified quotes that are in Drafted status. The list shows the quote name, quote number, version number, customer name, last modified date, and status. The number of quotes that appear on your Quote Listing page when you first log in is determined by your system administrator.

By default, the Quote Listing page does not list any quote versions with a status of Ordered or Inactive.

The Quote Listing page is the primary gateway to viewing quote details and modifying existing quotes. From this page, you can also initiate the processes required to create a new quote, copy an existing quote into a new quote, append existing line items on a quote to another existing quote, and inactivate an existing quote.

Figure 2–1 The Quote Listing Page

Quotes

Parameter:

Status:

Last Modified Between: And

Quote Search Results:

Create	Copy	Append	Inactivate	View More Versions			
Select	Quote Name	Customer	Quote Number	Version	Last Modified Date	Status	Total Amount
<input type="radio"/>	Databases	ABC Corp	89524	5	NOV 06 2000	Draft	\$1,020,000.00
<input type="radio"/>	eCommerce Suite	ABC Corp	10001	8	NOV 06 2000	Draft	\$6,195,066.00
<input type="radio"/>	Hosting	ABC Corp	45899	11	NOV 06 2000	Draft	\$50,000.00
<input type="radio"/>	Fast Forward	ABC Corp	79885	1	NOV 06 2000	Draft	\$20,000.00

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The Quote Listing page is accessible from every Oracle HTML Quoting page available to you, by clicking on the Quotes tab.

Use the following procedure to access your Quote Listing page.

Steps

1. Navigate to the Oracle CRM Applications login page at:

http://<host>:<apache port>/OA_HTML/jtfllogin.jsp

Note: Your system administrator can give you the values that should replace <host> and <apache port> in this URL.

2. Enter your user name and password, then click **Submit**.

Your Quote Listing page opens, with a list of the quotes assigned to your user name.

2.3 Viewing Quotes

From the Quote Listing page, you can create a new quote or navigate to any of your quotes for viewing or modification. The quote listing can be searched on by a variety of parameters. You can also choose to view other versions of the quotes that are listed on the Quote Listing page.

Steps

1. Navigate to your Quote Listing page.

The Quote Listing page opens with a list of the quotes assigned to your user name.

2. You can now do any of the following with this quote listing:
 - a. Click **Create** to begin the process of creating an entirely new quote in the current specialty store.
 - b. Search for specific quotes.
 - c. Click on a quote name link to view the quote details. When you view the quote details, you can decide to modify it if necessary.
 - d. In the Select column, highlight the radio button next to a quote and click **Copy** to begin the process of copying it.
 - e. In the Select column, highlight the radio button next to a quote and click **Append** to begin the process of appending its line items to an existing quote.
 - f. In the Select column, highlight the radio button next to a quote and click **Inactivate** to inactivate it.
 - g. In the Select column, highlight the radio button next to a quote and click **View More Versions** to view other versions of the selected quote that match the default Quote Listing criteria or search criteria.

2.3.1 Searching for Quotes

In the Quote Listing page, you can search for quotes assigned to you by a combination of criteria that include quote number, quote name, customer, status, range of dates of last modification.

The search process returns the highest quote versions that match the specified criteria and are assigned to you. You can use % as a lagging wildcard character. For example, you can enter "quote%," but not "%quote."

Steps

1. Navigate to your Quote Listing page.

The Quote Listing page opens with a list of the quotes assigned to your user name.

2. In the View Existing Quotes section, enter your search criteria as follows:
 - a. For Parameter, do one of the following:
 - Select **Quote Name** from the pull-down menu and enter either an exact quote name, or part of a quote name followed by % to conduct a wildcard search.
 - Select **Quote Number** from the pull-down menu and enter either an exact quote number, or part of a quote number followed by %.
 - Select **Customer** from the pull-down menu and enter either an exact customer name, or part of a customer name followed by %.

Note: There must be some data in the Parameter field before the search can proceed.

- b. For Status, choose the status of the quote(s) for which you are searching using the pull-down menu.
 - c. Optional: For Last Modified Between, click on the calendar buttons to choose a start date in the left field and an end date in the right field.
3. Click **Go**.

The Quote Listing page opens with a list of the quotes assigned to you that match the specified search criteria. Only the highest versions that are assigned to you appear.

2.3.2 Searching for More Versions of Quotes

Although the Quote Listing page and quote search return only the highest versions of the quotes assigned to you, you can also view other versions of the quote from the Quote Listing page if these versions also match the default Quote Listing criteria or search criteria.

Use this procedure to view the other versions of a quote that belong to you.

Steps

1. In the Quote Listing page, highlight the radio button next to the quote for which you want to see other versions.

2. Click **View More Versions**.

The Quotes page opens with a list of all applicable versions of the quote that belong to you and match the default Quote Listing criteria or the previously entered search criteria.

3. You can now do any of the following with this quote version listing:

- a. Click on the version number link of a quote to view the quote version. When you view the quote version, you can decide to modify it if necessary.
- b. Versions with status **Ordered** are listed with the order numbers. Click on the order number link to view the order in **Order Tracker**.
- c. In the **Select** column, highlight the radio button next to a quote version and click **Copy** to begin the process of copying it.
- d. In the **Select** column, highlight the radio button next to a quote version and click **Append** to begin the process of appending its line items to an existing quote.
- e. Click **Inactivate All** to inactivate all versions of the quote except those in **Ordered** status.

2.3.3 Viewing Quote Details

Use the following procedure to navigate to the main details page for a quote.

Steps

1. Navigate to your Quote Listing page.

The Quote Listing page opens with a list of the quotes assigned to your user name.

2. Click on a quote name link to view the quote details.

The Quote Details - Items page opens.

3. Click **Main** to view the main details page for the quote.

The Quote Detail - Main page opens. This page displays the following information for the quote: customer, contact, quote name, quote number, expiration date, opportunity (from OSO), agreement, status, channel, sales representative to whom the quote is assigned, user name that created the quote, creation date, user name that last modified the quote, and last modified date. This page also shows the order number for quotes in Ordered status.

This information updates automatically as you modify the quote.

4. You can now do any of the following in the Quote Detail - Main page:

- a. Click **Copy** to copy the quote into a new quote.
- b. Click **Append** to append the quote's line items to an existing quote.
- c. Click **Create New Version** to create a new version of the quote.
- d. Click **Print Quote** to view a printer-friendly summary of the quote.

5. From the Quote Detail - Main page, you can navigate to a different sub-tab:

- a. Click **Items** to add or remove items in the quote.
- b. Click **Pricing Agreements** to choose the pricing agreement that dictates the pricing of the quote.
- c. Click **Promotion Codes** to choose promotion codes for the quote.
- d. Click **Attachments** to attach files to the quote.
- e. Click **Notes** to create notes about the quote. (This sub-tab is available if you have entered Oracle HTML Quoting from OSO, and if your system administrator has enabled this functionality.)

- f. Click **Tasks** to schedule necessary tasks related to the quote. (This sub-tab is available if you have entered Oracle HTML Quoting from OSO, and if your system administrator has enabled this functionality.)
- g. Click **Versions** to view more versions of the quote.

2.4 Creating Quotes

A quote can be created as an entirely new quote or as a copy of an existing quote.

Quotes have certain basic attributes. These attributes include quote name, quote number, version number, sold-to customer, status, creation date, modification date, and assignment to a sales representative.

When you create a quote, you must initially specify the sold-to customer, the quote name, and the expiration date. A record for the new quote is created when you enter the quote name. Oracle HTML Quoting then generates the quote number, version number, creation date, modification date, status, and sales representative assignment. The quote number is unique across all quotes for all customer IDs and account numbers. For a new quote, the version number is always 1 and the status is Drafted. Oracle HTML Quoting assigns the quote to the logged in sales representative's user name.

Quote name, quote number, sold-to customer, and sales representative assignment cannot be changed after they have been initially set.

The searchable list of sold-to customers comes from Oracle Receivables. You can create new sold-to customers if you have the requisite permission.

2.4.1 Creating New Quotes

Use this procedure to create an entirely new quote.

Steps

1. In the Quote Listing page, click **Create**.
The Create Quote page opens.
2. In the Create Quote page, you must specify your sold-to customer. Enter the following search parameters for the customer:
 - a. In the Search a Customer Name field, enter your sold-to customer name, using % as a wildcard character if necessary.

Highlight the radio button next to Organization or Person, depending on your sold-to customer's party type.

- b. Optional: In the Customer Account Number field, enter your sold-to customer's account number, using % as a wildcard character if necessary.
- c. Optional: In the Country pull-down menu, choose your sold-to customer's country.

If you do not specify a value in the country field, the search will return all addresses for customers that match your other criteria, including the addresses that have a null value for their countries.

Note: If you need to create a new sold-to customer, click **Create Customer** instead to begin the process outlined in [Section 2.11, "Creating Customers"](#) of this manual. If you do not have the permission to create a new sold-to customer, this button does not appear on the page.

- 3. Click **Search** to search for your customer using the specified criteria.

The Create Quote page opens with a list of existing customers that match your search criteria. For each customer, it displays the customer name, account number, address, address type, and whether the address is the primary one for the customer. If the customer is an organization, the address listed is an organization address, not a contact's address.

- 4. In the Select column, highlight the radio button next to the sold-to customer you want to choose, and click **Continue**.

The next Create Quote page opens.

Note: The sold-to customer is defaulted as the ship-to and bill-to customers as well. You can change the ship-to and bill-to customers later if you have the requisite permissions.

- 5. In the Quote Name field, enter a name for the quote.
- 6. In the Expiration Date field, enter an expiration date, or keep the date that has been defaulted into the field. Your system administrator determines how the default date is calculated.
- 7. Click **Continue**. Oracle HTML Quoting creates the quote record.

The Quote Detail - Items page opens.

8. You can now do any of the following in the Quote Detail - Items page, either when first creating the quote or modifying the quote at a later time:
 - a. Search for items to add to the quote.
 - b. Remove items from the quote.
 - c. View price adjustment and configuration details.
 - d. If there are configurable items in the quote, click **Reconfigure** to launch Oracle Configurator and reconfigure the items.
 - e. Click **Check Availability** to check when the items in the quote will be available for shipping.
 - f. Click **Checkout** to enter shipping and billing information and place the quote as an order.
 - g. Click **Sales Credits** to assign sales credits at the header level.
 - h. Click **Assign** to assign sales credits at the line level.
9. From the Quote Detail - Items page, you can navigate to a different sub-tab, either when first creating the quote or modifying the quote at a later time:
 - a. Click **Main** to view the main details page for the quote.
 - b. Click **Pricing Agreements** to choose the pricing agreement that dictates the pricing of the quote.
 - c. Click **Promotion Codes** to choose promotion codes for the quote.
 - d. Click **Attachments** to attach files to the quote.
 - e. Click **Notes** to create notes about the quote. (This sub-tab is available if you have entered Oracle HTML Quoting from OSO, and if your system administrator has enabled this functionality.)
 - f. Click **Tasks** to schedule necessary tasks related to the quote. (This sub-tab is available if you have entered Oracle HTML Quoting from OSO, and if your system administrator has enabled this functionality.)
 - g. Click **Versions** to view more versions of the quote.

2.4.2 Adding Items to Quotes

You can search for items to add to quotes. The Oracle HTML Quoting product search allows searches based on item part numbers and names. You can restrict these searches by item category. Oracle HTML Quoting also allows you to add or configure the product directly from the search results to the quote.

There are two kinds of product search available to sales representatives: basic search and advanced search.

Basic Product Search

Use the following procedure to employ the basic product search.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
 - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
 - If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.

The Quote Detail - Items page opens with a product search interface.

Note: Some of the columns shown in the following figure may not appear in your Quote Detail - Items page, depending on your permissions and on how your system administrator has set up Oracle HTML Quoting.

Figure 2–2 The Product Search Interface for Oracle HTML Quoting

Quote Detail

[Main](#) [Items](#) [Pricing Agreements](#) [Promotion Codes](#) [Attachments](#) [Notes](#) [Tasks](#) [Versions](#)

Customer: [Sample Customer Corporation](#)

Quote Name: [E-Business Suite](#)

Quote Number: 99999 Version 8 of 10

Quick Search : [Advanced Search](#)

Remove	Line Type	Part Number	Product	Details	Unit of Measure	Number of Units	Unit Price	Net Price Over-ride	Total Price	Total Price Over-ride	Sales Credits
No items have been added.											

2. In the Quick Search pull-down menu, choose the product inventory category that contains the product you are searching for. You can also choose **All Products** to search across categories.
3. In the text field, enter the product name, using the wildcard character % if necessary.
4. Click **Go**.

The Add Item page lists the products that match your search criteria, including their part number, product, and unit of measure.

5. In the Add Item page, highlight the Select radio button next to the product that you want to add to the quote, then click the **Add** button that is immediately above or below the product search results.

The Quote Detail - Items page opens, showing the product you have added as a line item.

If the product you have selected is a configurable item, clicking **Add** will launch Oracle Configurator.

Figure 2-3 The Quote Line Item Listing

Quote Detail

[Main](#) [Items](#) [Pricing Agreements](#) [Promotion Codes](#) [Attachments](#) [Notes](#) [Tasks](#) [Versions](#)

Customer: [Sample Customer Corporation](#)

Quote Name: [E-Business Suite](#)

Quote Number: 99999 Version 8 of 10

Quick Search : [Advanced Search](#)

Remove	Line Type	Part Number	Product	Details	Unit of Measure	Number of Units	Unit Price	Net Price Over-ride	Total Price	Total Price Over-ride	Sales Credits	
<input type="checkbox"/>	Standard	CN92777	Sentinel Custom Desktop	Click Here	Ea	1	List: \$2,192.00 Adjustment: <-\$295.92> Net: \$1,896.08	<input type="text"/>	List: \$2,192.00 Adjustment: <-\$295.92> Net: \$1,896.08	<input type="text"/>	<input type="button" value="Assign"/>	
			<input type="button" value="Reconfigure"/>									
<input type="checkbox"/>	Standard	AX5678	Oracle 9i - Internet Database	Click Here	Ea	<input type="text" value="100"/>	List: \$500.00 Adjustment: <-\$125.00> Net: \$375.00	<input type="text"/>	List: \$50,000.00 Adjustment: <-\$12,500.00> Net: \$37,500.00	<input type="text"/>	<input type="button" value="Assign"/>	
<input type="checkbox"/>	Standard	J114534	Oracle e-Commerce Suite 11i	Click Here	Ea	<input type="text" value="200"/>	List: \$1000.00 Adjustment: <-\$250.00> Net: \$750.00	<input type="text"/>	List: \$200,000.00 Adjustment: <-\$50,000.00> Net: \$150,000.00	<input type="text"/>	<input type="button" value="Assign"/>	
<input type="checkbox"/>	Standard	GG567D	Oracle Marketing Online 11i	Click Here	Ea	<input type="text" value="300"/>	List: \$300.00 Adjustment: <-\$150.00> Net: \$150.00	<input type="text"/>	List: \$90,000.00 Adjustment: <-\$45,000.00> Net: \$45,000.00	<input type="text"/>	<input type="button" value="Assign"/>	
									Sub-Total:	\$234,396.08	<input type="text"/>	
									Shipping:	\$250.00		
									Tax:	\$250.00		
									Total:	\$234,396.08		

Shipping and tax amounts are estimates and could change based on actual shipment method used and destination.

- Optional: To remove a line item, select the Remove checkbox on the line, and click **Update**.
- Optional: To change the quantity of an item, alter the number in the Number of Units field, and click **Update**.
- Optional: To check availability of the products, click **Check Availability**.

The Availability page opens, listing each line item with its product name, part number, quantity, unit of measure, need by date, and availability information.

To check availability of a product for a different need by date, modify the date in the Need By Date field next to the product and click **Check Availability**.

Advanced Product Search

Use the following procedure to employ the advanced product search.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
 - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
 - If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.

The Quote Detail - Items page opens with a product search interface.

2. Click the **Advanced Search** link.

The Advanced Search page opens.

Figure 2–4 *The Advanced Search Page for Oracle HTML Quoting*

Advanced Search
Refine your search using AND, OR NOT and/or selecting categories

Categories: All Categories ▾

Keyword(s):

Match all words(and)
 Match any word(or)

Excluded Keyword(s):

3. In the Categories pull-down menu, choose the product inventory category that contains the product you are searching for. You can also choose **All Products** to search across categories.
4. In the Keyword(s) field, enter keywords by which you want to search for a product.

5. Highlight either the "Match all words (and)" radio button or the "Match any word (or)" radio button, to indicate whether the search results should return products that have all of your specified keywords or any one keyword.
6. In the Excluded Keyword(s) field, enter keywords that should not be associated with the products returned in the search results. (This is the equivalent of the boolean operator NOT.)

7. Click **Search**.

The Add Item page lists the products that match your search criteria, including their part number, product, and unit of measure.

8. In the Add Item page, highlight the Select radio button next to the product that you want to add to the quote, then click the **Add** button that is immediately above or below the product search results.

The Quote Detail - Items page opens, showing the product you have added as a line item.

If the product you have selected is a configurable item, clicking **Add** will launch Oracle Configurator.

9. Optional: To remove a line item, select the Remove checkbox on the line, and click **Update**.

10. Optional: To change the quantity of an item, alter the number in the Number of Units field, and click **Update**.

11. Optional: To check availability of the products, click **Check Availability**.

The Availability Information page opens, listing each line item with its product name, part number, quantity, unit of measure, number of units, need by date, and availability information.

To check availability of a product for a different need by date, modify the date in the Need By date field next to the product and click **Check Availability**.

2.4.3 Adding Trade-In Items to Quotes

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

When trade-ins are allowed, the Line Type column's fields in the Quote Detail - Items page appear as pull-down menus, as shown in [Figure 2-3, "The Quote Line Item Listing"](#), instead of read-only text. You can select **Return** from these Line Type pull-down menus to mark an item as a trade-in.

Use the following procedure to add a trade-in item to a quote.

Steps

1. Using the procedures outlined in [Section 2.4.2, "Adding Items to Quotes"](#), search for the item that your customer is trading in, and add it to the quote.
2. In the Quote Detail - Items page, on the line for the trade-in item, choose **Return** from the pull-down menu in the Line Type column.
3. Click **Update**.

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.

Note: Oracle HTML Quoting will not accept an order total that is negative.

Pricing, taxes, and shipping charges are also calculated for trade-in items, for the current date.

You can override trade-in item prices manually, as detailed in [Section 2.4.5, "Overriding Item Prices"](#).

2.4.4 Viewing Item Details in Quotes

Details for specific configurations of products and price adjustments are available through the Quote Details - Items page for a quote.

Configuration Details

For a configurable product, a Configuration Details link and a Reconfigure button appear next to the product name in the quote.

When you click **Configuration Details**, the Configuration Details window opens and shows the components of the configuration, along with their units of measure, quantities, unit net prices, and total prices.

When you want to reconfigure a product, click **Reconfigure** to launch Oracle Configurator.

Adjustment Detail

In the Quote Detail - Items page for a quote, an item line displays any price adjustment for the product as a hyperlink. When you click on the price adjustment link, the Adjustment Detail pop-up window opens to display the details of the price adjustment.

Details Column

If your system administrator has set up Oracle HTML Quoting to include a column with the heading, "Details," in the Quote Detail - Items page's product listing, you can click a link within the column to view further details about the product on that line.

2.4.5 Overriding Item Prices

You can override item prices manually if you have the requisite permission, at the line level. You can override a line item's unit net price or the item's total price.

If you reprice the quote after creating manual price overrides, for example by choosing a different pricing agreement, your manual price overrides remain intact.

If you make other changes to a quote line at the same time that you make a manual price override, such as a change in the item quantity, the impact of these changes on the pricing are reflected too.

You cannot make a manual price override that results in a negative price for the unit net price, the item total price, or the order subtotal.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
 - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
 - If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.
2. To override an item's unit net price:
 - a. In the line for the item, enter your desired price in the text field in the Net Price Override column.
 - b. Click **Update**.

The Quote Detail - Items page refreshes to reflect your manual price override.
3. To override an item's total price:
 - a. In the line for the item, enter your desired price in the text field in the Total Price Override column.
 - b. Click **Update**.

The Quote Detail - Items page refreshes to reflect your manual price override.

2.4.6 Allocating Sales Credits

Several sales credit types can be defined in Oracle Order Management. Each sales credit type is either revenue or non-revenue. The sum of the allocations of revenue sales credit types must equal 0% or 100% in a quote.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
 - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
 - If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.

2. Click **Sales Credits** to assign sales credits at the header level for the quote, or click **Assign** in the Sales Credits column to assign sales credits for a line item.

The Sales Credits page opens.

3. To allocate revenue sales credits, scroll down to the Revenue Classification section and follow these steps:

- a. Search for sales representatives to whom you can allocate sales credits by choosing a sales representative category from the Search pull-down menu, entering the sales representative's name or wildcard in the adjacent text field, and clicking **Go**.

The Add Resource page opens with your search results. For each sales representative, it shows the name, category, and sales group.

- b. Highlight the Select radio button next to one of the sales representatives and click **Add**.

The Sales Credits page opens, showing the sales representative that you chose in the Revenue Classification sales representative listing.

- c. For each sales representative, choose a revenue credit type from the pull-down menu in the Credit Type column.
- d. For each sales representative, indicate the percentage of sales credits they should receive if this quote is placed as an order, in the text field in the Credit Percent column.

Note: The sum of the allocations of revenue sales credit types must equal 0% or 100% in a quote.

- e. Click **Update** to save your changes.
 - f. Optional: Click **Restore** to revert to your last-saved changes.
 - g. Optional: To remove a sales representative from the Revenue Classification section, check the Remove checkbox on the sales representative's line and click **Update**.
4. To allocate non-revenue sales credits, scroll down to the Non-Revenue Classification section and follow these steps:
 - a. Search for sales representatives to whom you can allocate sales credits by choosing a sales representative category from the Search pull-down menu,

entering the sales representative's name or wildcard in the adjacent text field, and clicking **Go**.

The Add Resource page opens with your search results. For each sales representative, it shows the name, category, and sales group.

- b.** Highlight the Select radio button next to one of the sales representatives and click **Add**.

The Sales Credits page opens, showing the sales representative that you chose in the Non-Revenue Classification sales representative listing.

- c.** For each sales representative, choose a non-revenue credit type from the pull-down menu in the Credit Type column.
- d.** For each sales representative, indicate the percentage of sales credits they should receive if this quote is placed as an order, in the text field in the Credit Percent column.
- e.** Click **Update** to save your changes.
- f.** Optional: Click **Restore** to revert to your last-saved changes.
- g.** Optional: To remove a sales representative from the Revenue Classification section, check the Remove checkbox on the sales representative's line and click **Update**.

2.4.7 Applying Pricing Agreements

Pricing agreements are created in Oracle Order Management or Oracle Pricing by your system administrator or sales manager.

When creating a quote, you can select a pricing agreement. The Quote Detail - Pricing Agreements page displays all pricing agreements specific to the sold-to customer and all universal pricing agreements. You can choose which pricing agreement to apply when pricing a quote, if you have the requisite permission.

Steps

- 1.** From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
 - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
 - If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.

2. Click **Pricing Agreements**.

The Quote Detail - Pricing Agreements page opens. The page shows the pricing agreement and price list that is currently associated with the quote, and a list of pricing agreements that are eligible to be associated with the quote, with their price lists.

3. To remove the pricing agreement that is currently associated with the quote, click **Remove Pricing Agreement**.

4. To associate a pricing agreement with the quote, highlight the Select radio button next to the pricing agreement that you want to use and click **Apply**.

The Quote Detail - Pricing Agreements page refreshes to show the new pricing agreement.

2.4.8 Applying Promotion Codes

Oracle HTML Quoting allows you to enter promotion codes (also known as "offer codes") to capture automatic discounts set up in the Oracle Pricing engine as available to request.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
 - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
 - If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.

2. Click **Promotion Codes**.

The Quote Detail - Promotion Codes page opens.

3. In the Promotion Code column, enter each promotion code that you want to apply to the quote in a separate text field.

Note: You cannot add duplicate promotion codes.

4. Optional: If you want to apply more promotion codes than there are text fields, click **Add More Rows**.

The application adds three rows at a time.

5. Optional: To remove a promotion code, select the Remove checkbox next to it and click **Done**.
6. Click **Done** when you have finished entering promotion codes.

The promotion codes are applied to the quote.

2.4.9 Including Attachments in Quotes

You can browse a file system and attach various types of files to the quote, if you have the permission to do so. Attachments may be used for various purposes, depending on your organization's requirements and processes.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
 - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
 - If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.
2. Click **Attachments**.

The Quote Detail - Attachments page opens. This page shows a list of the files that have been attached to the quote, along with a brief description and the date that the file was added to the quote.
3. Click **Add** to attach a file to the quote.

The Add Attachment page opens.
4. In the Add Attachment page, click **Browse** to search for the file that you want to attach to the quote.

The File Upload window opens.
5. In the File Upload window, navigate to your file, select it, and click **Open**.

The File text field is populated with the file's directory path.
6. In the Description text field, enter a brief description of the file.
7. Click **Add**.

Note: You can click **Clear** instead to clear the text fields in the Add Attachment page.

The Quote Detail - Attachments page opens, listing the file that you have attached to the quote.

8. Optional: To remove an attachment, check the Remove checkbox on its line in the attachment listing and click **Update**.

2.5 Copying Quotes

You can copy existing quotes to create new quotes. You can copy quotes from the Quote Detail - Main page of an existing quote, the Quote Listing page, or the version history page. Clicking the **Copy** button in these pages initiates creation of a new quote that uses the selected quote as a template.

The following three copy options are available:

- Same customer, header and lines
- Same customer, header only
- Different customer, lines only

The following table summarizes the information that is copied by each of these three options:

Table 2-1 Information Copied by the Copy Quote Function

	Same Customer, Header and Lines	Same Customer, Header Only	Different Customer, Lines Only
Sales channel	Yes	Yes	No
Sold-to customer and contact	Yes	Yes	No
Ship-to customer, contact, and address at the header level	Yes	Yes	No
Ship-to customer, contact, and address at the line level	Yes	No	No

Table 2–1 Information Copied by the Copy Quote Function (Cont.)

	Same Customer, Header and Lines	Same Customer, Header Only	Different Customer, Lines Only
Shipping method, shipping instructions, packing instructions, requested delivery date at the header level	Yes	Yes	No
Shipping method, shipping instructions, packing instructions, requested delivery date at the line level	Yes	No	No
Bill-to customer, contact, and address at the header level	Yes	Yes	No
Items, line types, and quantity	Yes	No	Yes
Pricing agreement	Yes	Yes	No
Promocodes	Yes	Yes	No
Sales credits at the header level	Yes	Yes	No
Sales credits at line level	Yes	No	No
Attachments	No	No	No
Notes	No	No	No
Tasks	No	No	No

2.5.1 Copying an Entire Quote

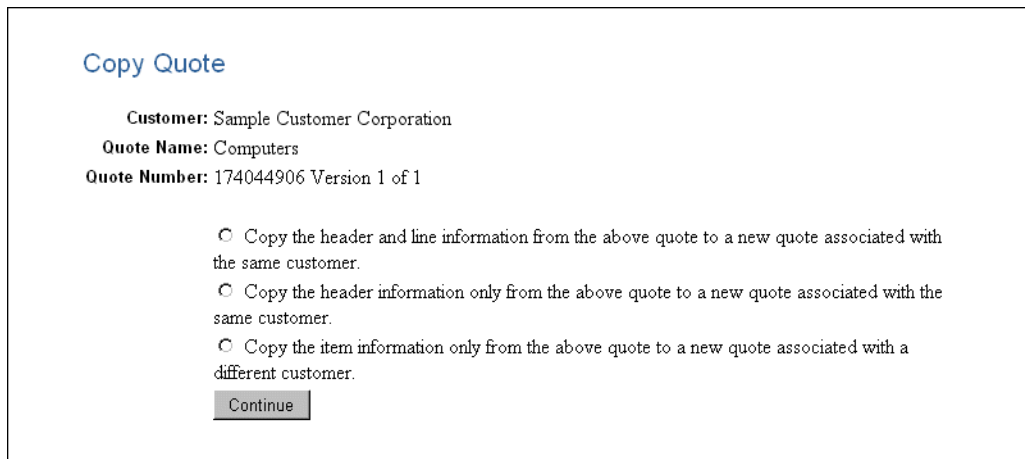
Use this procedure to copy an entire quote to a new quote for the same customer.

Steps

1. Navigate to the Copy Quote page in one of the following three ways:
 - In the Quote Listing page, highlight the Select radio button next to the quote that you want to copy, and click **Copy**.
 - In the Quote Detail - Main page of the quote that you want to copy, click **Copy**.
 - In the Quote Detail - Versions page of the quote that you want to copy, highlight the Select radio button next to the quote version that you want to copy, and click **Copy**.

The Copy Quote page opens.

Figure 2–5 The Copy Quote Page for Quoting



The screenshot shows a web page titled "Copy Quote". Below the title, it displays the following information:

- Customer:** Sample Customer Corporation
- Quote Name:** Computers
- Quote Number:** 174044906 Version 1 of 1

Below this information are three radio button options:

- Copy the header and line information from the above quote to a new quote associated with the same customer.
- Copy the header information only from the above quote to a new quote associated with the same customer.
- Copy the item information only from the above quote to a new quote associated with a different customer.

At the bottom of the options is a button labeled "Continue".

2. Highlight the radio button for "Copy the header and line information from the above quote to a new quote associated with the same customer."
3. Click **Continue**.

The Copy Quote page opens with Copy From: and Copy To: sections.

4. In the Copy To: section of this Copy Quote page, enter the quote name and click **Create**. (If you make a mistake, click **Clear** instead to clear the field on the page.)
The new quote is created, and the Quote Detail - Items page for the new quote opens.
5. You can now modify this quote if necessary.

2.5.2 Copying Header Information to a New Quote

Use this procedure to copy only header information to a new quote for the same customer.

Steps

1. Navigate to the Copy Quote page in one of the following three ways:
 - In the Quote Listing page, highlight the Select radio button next to the quote that you want to copy, and click **Copy**.
 - In the Quote Detail - Main page of the quote that you want to copy, click **Copy**.
 - In the Quote Detail - Versions page of the quote that you want to copy, highlight the Select radio button next to the quote version that you want to copy, and click **Copy**.

The Copy Quote page opens.

2. Highlight the radio button for "Copy the header information only from the above quote to a new quote associated with the same customer."
3. Click **Continue**.
The Copy Quote page opens with Copy From: and Copy To: sections.
4. In the Copy To: section of this Copy Quote page, enter the quote name and click **Create**. (If you make a mistake, click **Clear** instead to clear the field on the page.)
The new quote is created, and the Quote Detail - Items page for the new quote opens.
5. You can now modify this quote if necessary.

2.5.3 Copying Line Information to a New Quote

Use this procedure to copy only line information to a new quote for a different customer.

Steps

1. Navigate to the Copy Quote page in one of the following three ways:
 - In the Quote Listing page, highlight the Select radio button next to the quote that you want to copy, and click **Copy**.
 - In the Quote Detail - Main page of the quote that you want to copy, click **Copy**.
 - In the Quote Detail - Versions page of the quote that you want to copy, highlight the Select radio button next to the quote version that you want to copy, and click **Copy**.

The Copy Quote page opens.

2. Highlight the radio button for "Copy the item information only from the above quote to a new quote associated with a different customer."
3. Click **Continue**.

The Create Quote page opens.

4. In the Create Quote page, you must specify your sold-to customer. Enter the following search parameters for the customer:
 - a. In the Search a Customer Name field, enter your sold-to customer name, using % as a wildcard character if necessary.

Highlight the radio button next to Organization or Person, depending on your sold-to customer's party type.
 - b. Optional: In the Customer Account Number field, enter your sold-to customer's account number, using % as a wildcard character if necessary.
 - c. Optional: In the Country pull-down menu, choose your sold-to customer's country.

If you do not specify a value in the country field, the search will return all addresses for customers that match your other criteria, including the addresses that have a null value for their countries.

Note: If you need to create a new sold-to customer, click **Create Customer** instead to begin the process outlined in [Section 2.11, "Creating Customers"](#) of this manual. If you do not have the permission to create a new sold-to customer, this button does not appear on the page.

5. Click **Search** to search for your customer using the specified criteria.
The Create Quote page opens with a list of existing customers that match your search criteria. For each customer, it displays the customer name, account number, address, address type, and whether the address is the primary one for the customer. If the customer is an organization, the address listed is an organization address, not a contact's address.
6. In the Select column, highlight the radio button next to the sold-to customer you want to choose, and click **Continue**.
The Copy Quote page opens with Copy From: and Copy To: sections.
7. In the Copy To: section of this Copy Quote page, enter the quote name and click **Create**. (If you make a mistake, click **Clear** instead to clear the field on the page.)
The new quote is created, and the Quote Detail - Items page for the new quote opens.
8. You can now modify this quote if necessary.

2.6 Appending Quotes

You can also append items from one existing quote to another existing quote. This helps to minimize the effort necessary to browse the Oracle HTML Quoting product catalog.

You can append quotes from the Quote Detail - Main page of an existing quote, the Quote Listing page, or the version history page. Selecting a quote and clicking the **Append** button in these pages prompts you to specify the "target" quote to which the lines from the selected "source" quote should be appended. Appending these lines transfers only the information about the items and their line types and quantities. Pricing information for the items is not appended.

The "target" quote must have been created by you and have the status Drafted. The "source" quote can have any status, but it must also have been created by you.

Steps

1. Navigate to the Append Quote page in one of the following three ways:
 - In the Quote Listing page, highlight the Select radio button next to the quote that you want to append, and click **Append**.
 - In the Quote Detail - Main page of the quote that you want to append, click **Append**.
 - In the Quote Detail - Versions page of the quote that you want to copy, highlight the Select radio button next to the quote version that you want to append, and click **Append**.

The Append Quote page opens.

Figure 2–6 The Append Quote Page for Quoting

Append Quote

Append From: _____

Customer: Sample Customer Corporation
 Quote Name: Computers
 Quote Number: 174044906 Version 1 of 1



Append To: _____

Append the above quote to:

Quote Number:
 Version:

Search and select target quote:

Parameter: Quote Name ▾
 Status: Drafted ▾

Last Modified Between:  And 

2. If you know the quote number and version to which you want to append the quote, highlight the radio button next to "Append the above quote to:" and enter the quote number in the Quote Number: field and the version number in the Version: field.

3. If you do not know the exact quote version to which you want to append the quote, search for it as follows:
 - a. Highlight the radio button next to "Search and select target quote:".
 - b. For Parameter, do one of the following:
 - Select **Quote Name** from the pull-down menu and enter a quote name or wildcard.
 - Select **Quote Number** from the pull-down menu and enter a quote number or wildcard.
 - Select **Customer** from the pull-down menu and enter a customer name or wildcard.

Note: There must be some data in the Parameter field before the search can proceed.

- c. The Status pull-down menu only allows you to search for quotes in Drafted status.
 - d. Optional: For Last Modified Between, click on the calendar buttons to choose a start date in the left field and an end date in the right field.
4. Click **Go**.
 5. If you specified the target quote by quote number and version, the Quote Detail - Items page for the target quote opens, showing the new lines that you have appended from the source quote.
 6. If you searched for the target quote, the Append Quote page refreshes with a Quote Search Results section that lists the latest versions of quotes that match your search criteria.

Highlight the Select radio button next to the quote that you want to append to, and click **Append To**. (Optionally, click the quote name link to view the quote, or click **View More Versions** to view and choose other versions of the selected quote that match your search criteria.)

The Quote Detail - Items page for the target quote opens, showing the new lines that you have appended from the source quote.

2.7 Creating and Viewing Quote Versions

The quoting process can involve extended negotiations between you and the customer. Creating and managing several versions of a quote can facilitate these negotiations. You can also use quote versions to present the customer with multiple scenarios for a single quote.

2.7.1 Creating New Quote Versions

You can create a new quote version from any existing quote version that does not have a status of Ordered or Inactive. Oracle HTML Quoting numbers the versions of a single quote sequentially. For example, if you create a new quote version from Version 5 of 10, the new version is numbered as Version 11 of 11.

When you create a new quote version from an existing quote version, all header and line information is carried over to the new quote version: quote name, quote number, expiration date, sold-to customer, bill-to customer and address, ship-to customer and address, status, creation date, modification date, sales representative, items and their line types and quantities, price adjustments, sales credits, pricing agreements, promocodes, attachments, notes, tasks, and opportunity name and sales channel from OSO if applicable.

Note: Any changes that you make to a quote version are saved to that same version, not a new one. Therefore, to create a new version, you must click **Create New Version** in the Quote Detail - Main page of the older version before making any changes.

Steps

1. From the Quote Listing page, click on the quote name link of the quote for which you want to create a new version.

The Quote Detail - Items page opens.

2. Optional: If you want to create a new version of the quote from a different version than the one listed in the Quote Listing page, click on the **Versions** link.

The Quote Detail - Versions page opens.

Click on the version number link for the quote version that you want to create a new version of.

The Quote Detail - Items page for that quote version opens.

3. In the Quote Detail - Items page, click **Main**.
The Quote Detail - Main page opens.
4. In the Quote Detail - Main page, click **Create New Version**.
The Create New Version page opens. This page verifies that the new quote version has been created and lists the quote number, version number, and status for the new version.
5. After reviewing the Create New Version page, click **Continue**.
The Quote Detail - Main page for the new quote version opens.
The new quote version is ready to be modified.

2.7.2 Viewing Quote Versions

You can navigate from the Quote Listing page to view other versions of the quotes listed in that page that match the default Quote Listing criteria or your search criteria. See [Section 2.3.2, "Searching for More Versions of Quotes"](#) for more information.

You can also navigate from the Quote Detail pages for a quote to view all other versions of the quote that you own, using the following procedure.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote by clicking on its quote name link.
The Quote Detail - Items page opens.
2. Click on the Versions sub-tab.
3. The Quote Detail - Versions page opens. This page lists all other versions of the current quote that you own. It includes each quote version's version number, last modified date, creation date, status, total amount, and order number if it has been placed as an order.
4. From the Quote Detail - Versions page, you can do any of the following:
 - a. Click on the version number link of a quote to view the quote version's Quote Detail - Items page. From the Quote Detail - Items page, you can decide to modify the quote version if necessary.
 - b. Versions with status Ordered are listed with the order numbers. Click on the order number link to view the details of the order.

- c. In the Select column, highlight the radio button next to a quote version and click **Copy** to begin the process of copying it.
- d. In the Select column, highlight the radio button next to a quote version and click **Append** to begin the process of appending its line items to an existing quote.
- e. Click **Inactivate All** to inactivate all versions of the quote except those of status Ordered.

2.8 Inactivating Quotes

If you know that a customer will not accept a quote, you can inactivate it.

You can inactivate all versions of a quote in the Quote Listing page, the Quote Detail - Versions page, or the Quotes page for version search results.

Use the following procedure to inactivate a quote in the Quote Listing page.

Steps

1. In the Quote Listing page, highlight the radio button next to the quote that you want to inactivate.
2. Click **Inactivate**.

All versions of the quote are inactivated.

Use the following procedure to inactivate a quote in the Quote Details - Versions page.

Steps

1. From the Quote Listing page, click on a quote name link.
The Quote Detail - Items page opens.
2. Click **Versions**.
The Quote Detail - Versions page opens.
3. Click **Inactivate All** to inactivate all versions of the quote.

The quote versions are inactivated.

Use the following procedure to inactivate a quote in the Quotes page for version search results.

Steps

1. In the Quote Listing page, highlight the radio button next to the quote version that you want to inactivate.

2. Click **View More Versions**.

The Quotes page opens with a list of all versions of the quote that belong to you and match the default Quote Listing criteria or your search criteria.

3. Click **Inactivate All** to inactivate all versions of the quote.

The quote versions are inactivated.

2.9 Printing Quotes

If you need to view all components of a quote simultaneously on the page or give the customer a paper copy of the quote, you can create a printable layout of the quote.

Steps

1. From the Quote Listing page, click on a quote name link.

The Quote Detail - Items page opens.

2. Click **Main**.

The Quote Detail - Main page opens.

3. Click **Print Quote**.

A printable layout of the quote opens on the page. It shows the sold-to, ship-to, and bill-to customer information, the line items' part numbers, descriptions, UOMs, quantities, unit prices, price adjustments, and total prices, estimated or final shipping and handling costs, and tax.

4. If you need a paper copy of the quote, choose your browser's Print option to print this page.

2.10 Transforming Quotes to Orders

You can transform quotes into orders if you have the required permissions. Transforming quotes to orders involves entering shipping and billing customers, contacts, and addresses during a checkout process.

Note: Often the choices of a customer, contact, and address cannot be separated from each other, since they are usually viewed as a combination. If you change the customer, the address is replaced and the contact is removed. If you change the contact, and the address is associated with the contact rather than the organization, replace the address. If you change the address, and the new address is associated with a contact rather than the organization, replace the contact with the new contact who has the new address. If you change the address to a corporate address that is associated with the organization, do not change the contact.

2.10.1 Checkout Process: Shipping Details

Entering shipping details is the first step of the checkout process that transforms a quote into an order.

If the customer does not already have a financial account in the Oracle ERP applications, this step also creates an ERP financial account for the customer. You can perform this step for a new customer only if you have the permissions to create a ship-to customer, contact, and address.

When you choose a ship-to customer, you can choose either from a list of all existing customers or from a list of only those customers who have a shipping relationship with the sold-to customer, depending on your permissions.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
 - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
 - If you want to submit an existing quote as an order, click on its quote name link to open its Quote Detail - Items page.
2. Click **Checkout**.

The Shipping Information page opens.

The sold-to customer and contact are displayed in read-only format in the Sold to Customer and Sold to Contact regions, respectively.

3. In the Shipping Method region, choose the shipping method from the pull-down menu.
4. In the Ship to Customer region, the sold-to customer defaults as the ship-to customer.

If you want to choose another ship-to customer, follow these steps:

- a. Click **Change**.

The Ship to Customer page opens.

- b. Enter the following search parameters for the customer:

- In the Search a Customer Name field, enter your ship-to customer name, using % as a wildcard character if necessary.

Highlight the radio button next to Organization or Person, depending on your ship-to customer's party type.

- Optional: In the Customer Account Number field, enter your ship-to customer's account number, using % as a wildcard character if necessary.
- Optional: In the Country pull-down menu, choose your ship-to customer's country.

If you do not specify a value in the country field, the search will return all addresses for customers that match your other criteria, including the addresses that have a null value for their countries.

Note: If you need to create a new ship-to customer, click **Create Customer** instead to begin the process outlined in [Section 2.11, "Creating Customers"](#) of this manual. If you do not have the permission to create a new ship-to customer, this button does not appear on the page.

- c. Click **Search** to search for your customer using the specified criteria.

The Ship to Customer page opens. The Customer Search Results region displays all existing customers that match your search criteria. For each

customer, it displays the customer name, account number, address, address type, and whether the address is the primary one for the customer. If the customer is an organization, the address listed is an organization address, not a contact's address.

- d. In the Select column, highlight the radio button next to the ship-to customer you want to choose, and click **Continue**.

The Shipping Information page opens with the updated values in the Ship to Customer region.

- e. Optional: If you want to change the ship-to customer back to the sold-to customer, click **Default** in the Ship to Customer region.
5. In the Ship to Contact region, choose a ship-to contact by following these steps:
 - a. Click **Change**.

The Ship to Contact page opens. The Contact Search Results region displays all existing contacts for the ship-to customer, together with their primary phone numbers and e-mail addresses.

- b. Optional: Search for a contact for the ship-to customer by entering the contact's name in the Search a Contact Name field, using the wildcard character % if necessary, and clicking **Search**.

Note: If you need to create a new ship-to contact, click **Create Contact** instead to begin the process outlined in [Section 2.10.4, "Creating Contacts"](#) of this manual. If you do not have the permission to create a new ship-to contact, this button does not appear on the page.

The Contact Search Results region displays the contacts for the ship-to customer that match the contact name for which you searched.

- c. In the Select column, highlight the radio button next to the ship-to contact you want to choose, and click **Continue**.

The Shipping Information page opens with the updated values in the Ship to Contact region.

- d. Optional: If you want to remove this ship-to contact, click **Remove** in the Ship to Contact region.

6. In the Ship to Address region, the primary ship-to address for the ship-to customer defaults as the ship-to address.

If you want to choose another ship-to address, follow these steps:

- a. Click **Change**.

The Ship to Address page opens. The Address Search Results region displays addresses for the ship-to customer, together with the customer, contact, and type for each address, and whether the address is the primary one for the customer.

- b. Optional: Filter the list of addresses by country, by choosing a country from the Country pull-down menu and clicking **Search**.

Note: If you need to create a new ship-to address, click **Create Address** instead to begin the process outlined in [Section 2.10.5, "Creating Addresses"](#) of this manual. If you do not have the permission to create a new ship-to address, this button does not appear on the page.

The Address Search Results region displays the addresses for the ship-to customer in the country that you specified.

- c. In the Select column, highlight the radio button next to the ship-to address you want to choose, and click **Continue**.

Note: You can also click **View All Contacts** to view all addresses for all contacts of the ship-to customer. If you do not have the permission to change the ship-to contact, this button does not appear on the page.

The Shipping Information page opens with the updated values in the Ship to Address region.

7. In the Shipping Instructions region, enter a date in the Requested Delivery Date field in DD-MON-YYYY format, clicking the calendar button to access the date picker if necessary.
8. In the Shipping Instructions field, enter any specific shipping instructions that you have.

9. In the Packing Instructions field, enter any specific packing information that you have.
10. In the Line Level Shipping region, highlight the Yes radio button to ship all items to the same address, or highlight the No radio button to ship items in the quote to different addresses.
11. Click **Continue**.
12. If you chose Yes in the Line Level Shipping region, the Payment and Billing Information page opens. See [Section 2.10.2, "Checkout Process: Billing Details"](#) for instructions on filling out this page.
13. If you chose No in the Line Level Shipping region, the Line Shipping Information page opens, listing each line item in the quote.
14. Highlight the Select radio button next to a line item that you want to ship to an address different from the header-level ship-to address.
15. Optional: Click **Split** if you want to ship the items on this line to more than one address.

The Line Shipping Split Quantity page opens.

Figure 2–7 The Line Shipping Split Quantity Page

Line Shipping Split Quantity

Part Number	Product	Unit Of Measure	Quantity	Split To
ik54888	Sentinel Standard Desktop	Ea	3	<input style="width: 50px;" type="text" value="2"/> <input style="width: 50px;" type="text" value="1"/> <input style="width: 50px;" type="text"/>

Please note that the sum of the split quantities may be equal to or less, but not greater, than the original quantity.

Proceed through the following steps to split one line item into multiple lines:

- a. In the fields in the Split To column, enter the item quantities into which you want to split the line. Use a different field for each ship-to address to which you want to send the line item. For example, if a line has 6 units of Product A, and you want to ship 2 units each to Address X, Address Y, and Address Z, enter the number 2 in three different fields.
- b. Optional: You can click **Add Rows** to add more fields to the Split To column if necessary.
- c. When finished, click **Submit**.

The Line Shipping Information page opens, displaying the line item splits.

16. Click **Modify** to change the shipping information for the selected line item in its Shipping Information page.

When finished, click **Continue** in the line item's Shipping Information page.

The Line Shipping Information page opens.

17. Optional: Click **Details** to view line-level shipping details for a line item.

The Line Shipping Details pop-up window shows the line item's shipping details. Click **Close** to close this window.

18. Click **Continue** when you have finished entering line level shipping information.

The Payment and Billing Information page opens. See [Section 2.10.2, "Checkout Process: Billing Details"](#) for instructions on filling out this page.

2.10.2 Checkout Process: Billing Details

After entering the shipping details, the next step in the checkout process is entering the billing details.

When you choose a bill-to customer, you can choose either from a list of all existing customers or from a list of only those customers who have a billing relationship with the sold-to customer, depending on your permissions.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.
 - If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
 - If you want to submit an existing quote as an order, click on its quote name link to open its Quote Detail - Items page.
2. Click **Checkout**.

The Shipping Information page opens.
3. Click **Continue**.

The Payment and Billing Information page opens.

The sold-to customer and contact are displayed in read-only format in the Sold to Customer and Sold to Contact regions, respectively.
4. In the Payment Information region, enter payment information as follows:
 - If the customer is paying by purchase order, highlight the "Purchase Order" radio button and enter the purchase order number in the field below. Follow any other purchase order-specific instructions pertinent to your organization.
 - If the customer is paying with a credit card which has already been entered in the quote billing details, highlight the "Existing Credit Card" radio button and choose the credit card from the pull-down menu below.
 - If the customer is paying with a credit card which has not been entered in the quote billing details, highlight the "New Credit Card" radio button. Choose the credit card type from the Type pull-down menu, enter the credit card number in the Number field, and use the Expiration Date pull-down menus to enter the expiration date.

- If the customer is paying by credit card and faxing the credit card information, highlight the "I will fax my Credit Card" radio button. Follow any other instructions pertinent to your organization that are related to faxing credit card information.
 - If your organization will bill the customer by invoice, highlight the "Invoice" radio button.
5. In the Bill to Customer region, the sold-to customer defaults as the bill-to customer.

If you want to choose another bill-to customer, follow these steps:

a. Click **Change**.

The Bill to Customer page opens.

b. Enter the following search parameters for the customer:

- In the Search a Customer Name field, enter your bill-to customer name, using % as a wildcard character if necessary.

Highlight the radio button next to Organization or Person, depending on your bill-to customer's party type.

- Optional: In the Customer Account Number field, enter your bill-to customer's account number, using % as a wildcard character if necessary.

- Optional: In the Country pull-down menu, choose your bill-to customer's country.

If you do not specify a value in the country field, the search will return all addresses for customers that match your other criteria, including the addresses that have a null value for their countries.

Note: If you need to create a new bill-to customer, click **Create Customer** instead to begin the process outlined in [Section 2.11, "Creating Customers"](#) of this manual. If you do not have the permission to create a new bill-to customer, this button does not appear on the page.

c. Click **Search** to search for your customer using the specified criteria.

The Bill to Customer page opens. The Customer Search Results region displays all existing customers that match your search criteria. For each

customer, it displays the customer name, account number, address, address type, and whether the address is the primary one for the customer. If the customer is an organization, the address listed is an organization address, not a contact's address.

- d. In the Select column, highlight the radio button next to the bill-to customer you want to choose, and click **Continue**.

The Payment and Billing Information page opens with the updated values in the Bill to Customer region.

- e. Optional: If you want to ship to the sold-to customer instead, click **Default** in the Ship to Customer region.
6. In the Bill to Contact region, choose a bill-to contact by following these steps:

- a. Click **Change**.

The Bill to Contact page opens. The Contact Search Results region displays all existing contacts for the bill-to customer, together with their primary phone numbers and e-mail addresses.

- b. Optional: Search for a contact for the bill-to customer by entering the contact's name in the Search a Contact Name field, using the wildcard character % if necessary, and clicking **Search**.

Note: If you need to create a new bill-to contact, click **Create Contact** instead to begin the process outlined in [Section 2.10.4, "Creating Contacts"](#) of this manual. If you do not have the permission to create a new bill-to contact, this button does not appear on the page.

The Contact Search Results region displays the contacts for the bill-to customer that match the contact name for which you searched.

- c. In the Select column, highlight the radio button next to the bill-to contact you want to choose, and click **Continue**.

The Payment and Billing Information page opens with the updated values in the Bill to Contact region.

- d. Optional: If you want to remove this bill-to contact, click **Remove** in the Ship to Contact region.

-
7. In the Bill to Address region, the primary bill-to address for the bill-to customer defaults as the bill-to address.

If you want to choose another bill-to address, follow these steps:

- a. Click **Change**.

The Bill to Address page opens. The Address Search Results region displays addresses for the bill-to customer, together with the customer, contact, and type for each address, and whether the address is a primary one for the customer.

The list of addresses includes all existing addresses from the countries to which sales representatives can sell in Oracle HTML Quoting.

- b. Optional: Filter the list of addresses by country, by choosing a country from the Country pull-down menu and clicking **Search**.

Note: If you need to create a new bill-to address, click **Create Address** instead to begin the process outlined in [Section 2.10.5, "Creating Addresses"](#) of this manual. If you do not have the permission to create a new bill-to address, this button does not appear on the page.

The Address Search Results region displays the addresses for the bill-to customer in the country that you specified.

- c. In the Select column, highlight the radio button next to the bill-to address you want to choose, and click **Continue**.

Note: You can also click **View All Contacts** to view all addresses for all contacts of the bill-to customer. If you do not have the permission to change the bill-to contact, this button does not appear on the page.

The Payment and Billing Information page opens with the updated values in the Bill to Address region.

8. In the Tax Information region, highlight the "Yes" radio button if the order is taxable.

If the order is not taxable, highlight the "No" radio button, choose the reason for the tax exemption from the Reason Code pull-down menu, and enter the bill-to customer's tax certificate number in the Tax Certification Number field.

9. Click *Continue*.

The Review Order Details and Confirm page opens. You can now review the order details as outlined in and place the order.

2.10.3 Placing Orders

You can place quotes as orders if you have the required permission.

Use the following procedure to review the details of the order and place it.

Steps

1. From the Quote Listing page, navigate to the Quote Detail - Items page for a quote.

- If you are creating a new quote, the Quote Detail - Items page opens after you enter the quote name.
- If you want to modify an existing quote, click on its quote name link to open its Quote Detail - Items page.

2. Click **Checkout**.

The Shipping Information page opens.

3. Click **Continue**.

The Payment and Billing Information page opens.

4. Click **Continue**.

The Review Order Details and Confirm page opens. It displays a summary of the quote's details, including line items, shipping information, and payment and billing information.

5. You can perform any of the following tasks in the Review Order Details and Confirm page before placing the quote as an order:

- a.** Update the quantity of an item: Update the number in the Number of Units field for the item, and click **Update**.
- b.** View configuration details for an item: Click on the **Configuration Details** link in a quote line to view the details of the item configuration in the Configuration Details window.

- c. View the price adjustment detail of an item: Click on the price adjustment link to view the details of the price adjustment in the Adjustment Detail pop-up window.
 - d. View line-level shipping information: Click on a **Details** button in the Line Level Shipping column to view shipping information for a line item.
 - e. Modify shipping information: Click on the **Click here to change Shipping Information** link to modify shipping information in the Shipping Information page.
 - f. Modify payment and billing information: Click on the **Click here to change Billing Information** link to modify billing information in the Payment and Billing Information page.
6. When you have finished reviewing the quote, click **Place Order** to place the quote as an order.

2.10.4 Creating Contacts

Contacts for customers are normally created through processes in OSO, Oracle TeleSales, or Oracle Receivables. Oracle HTML Quoting offers a generic procedure for creating a contact to sales representatives that enters only the minimum information necessary to place an order.

You can create contacts in the following stages of the quote, if you have the requisite permissions:

- Checkout process: shipping details
- Checkout process: billing details

You can create contacts only for B2B customers.

Steps

1. In the Ship to Contact page or the Bill to Contact page, click **Create Contact**.
The Create Contact page opens. The organization name opens in the Customer Name read-only field.
2. Enter the contact's information in the Create New Contact page as follows:
 - a. In the First Name, MI, and Last Name fields, enter the contact's first name, middle initial, and last name, respectively.
 - b. In the Email field, enter the contact's e-mail address.

- c. In the Day Phone, Evening Phone, and Fax Number fields, enter the contact's daytime, evening, and fax phone numbers, respectively.
 - d. In the Address Name field, enter what address this is for the contact: Home, Office, or another name.
 - e. In the Address fields, enter your contact's ship-to address if you initially clicked the **Create Contact** button in the Ship to Contact page.

Enter your contact's bill-to address if you clicked the **Create Contact** button in the Bill to Contact page.
 - f. In the City field, enter the city of the contact's address.
 - g. In the County field, enter the county of the contact's address.
 - h. In the State field, enter the state of the contact's address.
 - i. In the Zip field, enter the zip code of the contact's address.
 - j. In the Country pull-down menu, select the country of the contact's address.
3. Click **Create**. (You can click **Clear** instead to clear all of the fields in this form.)

If you initiated the process to create your contact in the Ship to Contact page, the Shipping Information page opens with the newly created contact's information entered.

If you initiated the process to create your contact in the Bill to Contact page, the Payment and Billing Information page opens with the newly created contact's information entered.

2.10.5 Creating Addresses

Addresses for customers are normally created through processes in OSO, Oracle TeleSales, or Oracle Receivables. Oracle HTML Quoting offers a generic procedure for creating an address to sales representatives that enters only the minimum information necessary to place an order.

You can create addresses in the following stages of the quote, if you have the requisite permissions:

- Checkout process: shipping details
- Checkout process: billing details

Steps

1. In the Ship to Address page or the Bill to Address page, click **Create Address**.
The Create Address page opens.
2. Enter the address information in the Create Address page as follows:
 - a. Highlight the radio button next to the Customer Name or Contact Name for which you are creating the address.
 - b. In the Address Name field, enter what address this is: Home, Office, or another name.
 - c. In the Address fields, enter a ship-to address if you initially clicked the **Create Address** button in the Ship to Address page.
Enter a bill-to address if you clicked the **Create Address** button in the Bill to Address page.
 - d. In the City field, enter the city.
 - e. In the County field, enter the county.
 - f. In the State field, enter the state.
 - g. In the Zip field, enter the zip code.
 - h. In the Country pull-down menu, select the country.
3. Click **Create**. (You can click **Clear** instead to clear all of the fields in this form.)
If you initiated the process to create the address in the Ship to Address page, the Shipping Information page opens with the newly created address entered.
If you initiated the process to create the address in the Bill to Address page, the Payment and Billing Information page opens with the newly created address entered.

2.11 Creating Customers

The customer is normally created through processes in OSO, Oracle TeleSales, or Oracle Receivables. Oracle HTML Quoting offers a generic procedure for creating a customer to sales representatives that enters only the minimum information necessary to place an order.

You can create customers in the following stages of the quote, if you have the requisite permissions:

- Create the quote
- Copy the quote
- Checkout process: shipping details
- Checkout process: billing details

Steps

1. From the Create Quote page, the Copy Quote page, the Ship to Customer page, or the Bill to Customer page, click **Create Customer**.
2. The Create Customer page opens.
3. Enter your customer's information in the Create Customer page as follows:
 - a. Highlight the Organization radio button if your customer is an organization. Enter the organization's name in the text field below.
 - b. Highlight the Person radio button if your customer is an individual. Enter his or her last name, first name, and middle initial in the Last Name, First Name, and MI fields, respectively. Enter your customer's e-mail address in the Email field.
 - c. In the Phone Number fields, enter the customer's country code in the first field, phone number in the second field, and extension in the third field.
 - d. In the Address Name field, enter what address this is for the customer: Home, Office, or another name.
 - e. In the Address fields, enter your customer's sold-to address if you initially clicked the **Create Customer** button in the Create Quote or Copy Quote pages.

Enter your customer's ship-to address if you clicked the **Create Customer** button in the Ship to Customer page.

Enter your customer's bill-to address if you clicked the **Create Customer** button in the Bill to Customer page.

- f. In the City field, enter the city of the customer's address.
 - g. In the County field, enter the county of the customer's address.
 - h. In the State field, enter the state of the customer's address.
 - i. In the Zip field, enter the zip code of the customer's address.
 - j. In the Country pull-down menu, select the country of the customer's address.
4. Click **Create**. (You can click **Clear** instead to clear all of the fields in this form.)

If you initiated the process to create your customer in the Create Quote page, the Create Quote page that requests the quote name and expiration date opens.

If you initiated the process to create your customer in the Copy Quote page, the Copy Quote page with the Copy From: and Copy To: sections opens. You can now enter the quote name.

If you initiated the process to create your customer in the Ship to Customer page, the Shipping Information page opens with the newly created customer's information entered.

If you initiated the process to create your customer in the Bill to Customer page, the Payment and Billing Information page opens with the newly created contact's information entered.

Glossary

B2B customer

A representative of a corporate customer, who is set up in Oracle HTML Quoting and related applications as an employee of that customer organization.

B2C customer

An individual customer who represents only himself or herself.

Blueprint phase

A phase of a project in which the business plan around the solution is developed, the solution is defined, business and system integration requirements are modeled, and the partitions of tasks are defined.

Checkout

Checkout takes customers and sales representatives to the first in a sequence of checkout pages. Moving through the process, customers and sales representatives enter the shipping address, choose a shipping method, enter payment information and a billing address, then review and place the order.

Complementary sell

Complementary sells persuade customers to buy a product that complements a product in which they are interested.

Construction phase

The construction phase of a project is where the solution is built. It involves refining the data and functional models, the physical application modules, and the system interfaces until they meet the business requirements.

Cookie

Cookies are general mechanisms which server side connections use both to store and to retrieve information on the client side of the connection.

Cross-sell

See Complementary sell.

Demilitarized zone (DMZ)

Derived from the term demilitarized zone, it is the area between two firewalls which is isolated from both untrusted and trusted networks.

Drafted

This quote status allows sales representatives to modify the quote. It is automatically assigned to every new quote created in Oracle HTML Quoting.

Firewall

A firewall controls the type of traffic entering a site. Internet traffic should be limited to connections originating from browser-based HTTP sessions, that is, from Telnet and FTP.

Flexfields

Flexfields allow merchants to store additional information in the databases that support Oracle HTML Quoting, according to their specific needs.

Inactive

Sales representatives can assign this quote status to a quote with a Drafted status if they expect no further action on the quote. Sales representatives cannot modify a quote that has an Inactive status. However, they can copy or append a quote that has this status.

Invoice

The bill for an order that is generated by Oracle Receivables when items are shipped.

Launch phase

During this phase, the project team prepares for and executes the launch of the store including production installation, validation, documentation, and training.

During this time, the implementation team may perform additional incremental development to provide more functionality or address non-functional requirements, such as enhancing performance and reliability.

Ordered

Oracle HTML Quoting automatically assigns this quote status to all quotes placed as orders. Sales representatives cannot modify a quote that has an Ordered status. However, they can copy or append a quote that has this status.

OSO

Acronym for Oracle Sales Online.

Payments

Payments made by a customer against invoices.

Product item/Product

An item that is available for sale through Oracle HTML Quoting.

Product Search

Product Search brings up a query form that allows users to search for products.

Quote

A collection of items with pricing that a sales representative with a Sales Representative role creates on behalf of a customer in Oracle HTML Quoting.

Quote status

The quote status indicates the stage of preparation that a quote is in. Possible quote statuses include [Drafted](#), [Ordered](#), and [Inactive](#).

Sales Representative Role

A role that allows the creation and subsequent modification of a quote for customers in Oracle HTML Quoting by the merchant organization personnel. This role is typically assigned to sales representatives of the merchant organization. A Sales Representative role can have a variety of permissions, such as the ability to submit a quote as an order and permission to create new customers.

Secure Electronic Transaction

Secure Electronic Transaction (SET) 1.0 protocol is an open standard developed jointly by Visa and MasterCard to ensure the privacy and security of credit card transactions over open networks such as the Internet.

Settling transactions

Settling transactions includes capturing authorized transactions, processing voids and returns, and batch administration.

Transactional data

Transactional data refers to information that is the result of customer interaction with the store.

Upsell

Upsells aim to persuade customers to buy more expensive types of the same product.

VAD/Partner

A user type with a role that is a variation of a B2B customer. The entity (organization or individual) with which the user is associated has a partner relationship with the merchant owning the Oracle HTML Quoting installation.

Wildcard

A special character within a search parameter that tells the application to search for all records that are similar to the search parameter. In Oracle HTML Quoting, % is the wildcard character. For example, if you enter "renew%" as a quote name search parameter, the application returns all quotes with names that begin with "renew."

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