

# Oracle® Quoting - Forms

Implementation Guide

Release 11*i*

November 2001

Part No. A92184-01

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# Send Us Your Comments

## **Oracle Quoting - Forms Implementation Guide, Release 11i**

**Part No. A92184-01**

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

- Did you find any errors?
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- Do you need more information? If so, where?
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- FAX: 650-654-6208 Attn: Oracle Quoting - Forms Documentation
- Postal service:

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Oracle Quoting - Forms Documentation  
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Redwood Shores, CA 94065  
USA

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

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



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# Preface

## Audience for This Guide

Welcome to Release 11i of the *Oracle Quoting - Forms Implementation Guide*, formerly the *Oracle Order Capture Implementation Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Quoting  
If you have never used Oracle Quoting, Oracle suggests you attend one or more of the Quoting training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

## How To Use This Guide

This guide contains the information you need to understand and use Quoting.

- Chapter 1 provides an overview of the Quoting application and its components, and lists features and functionality new in this release.
- Chapter 2 describes Oracle Quoting's architecture and lists the minimum software and hardware requirements.
- Chapter 3 lists the mandatory and conditional dependencies of Oracle Quoting.

- Chapter 4 provides an overview of the implementation process.
- Chapter 5 lists the specific tasks involved in the implementation of Oracle Quoting.
- Chapter 6 contains a list of tasks for verifying the implementation.
- Appendix A contains a complete list of Oracle Quoting’s public APIs.
- Appendix B provides a list of the pricing and qualifier attributes that Oracle Quoting supports.

## Typographic Conventions

The following table lists the typographic conventions used in this manual:

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

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

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## Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Quoting.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

### Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

### Related Documentation

Quoting shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Quoting.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

## **Documents Related to All Products**

### **Oracle Applications User's Guide**

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Quoting (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

## **Documents Related to This Product**

### **Oracle Quoting - Forms Concepts and Procedures**

This document provides users with information on the general principles and procedures of creating and managing quotes in Oracle Quoting.

### **Implementing Oracle CRM: ERP Functional Checklist**

This document provides users with a list of verification tasks to perform before using CRM applications.

### **Oracle Pricing User's Guide**

This document provides users with information on setting up promotion codes, pricing agreements, and price lists that are used when creating quotes in Oracle Quoting.

### **Oracle Bill of Materials User's Guide**

This user guide explains how to set up Oracle Bill of Materials, which Oracle Quoting uses to access information about components of products.

### **Oracle General Ledger User Guide**

This document provides information on exchange rates, and setting up ledgers and books.

### **Oracle Inventory User's Guide**

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

## **Oracle Order Management Suite Implementation Manual**

This manual explains the steps necessary to implement Oracle Order Management, which Oracle Quoting uses to transform quotes into orders.

## **Oracle Receivables User's Guide**

This document provides users with setup information for Oracle Receivables as well as information about creating customers and setting up tax information.

## **Installation and System Administration**

### **Oracle Applications Concepts**

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

### **Installing Oracle Applications**

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

### **Upgrading Oracle Applications**

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

### **Maintaining Oracle Applications**

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to

run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

### **Oracle Applications System Administrator's Guide**

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

### **Oracle Applications Developer's Guide**

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

### **Oracle Applications User Interface Standards for Forms-Based Products**

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

### **Other Implementation Documentation**

#### **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Quoting implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

#### **Oracle eTechnical Reference Manuals**

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

## **Oracle Applications Message Reference Manual**

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

## **Oracle CRM Application Foundation Implementation Guide**

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

## **Training and Support**

### **Training**

Oracle offers training courses to help you and your staff master Quoting and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

### **Support**

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Quoting working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

### **OracleMetaLink**

*OracleMetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With *OracleMetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use *MetaLink*, register at (<http://metalink.oracle.com>).

**Alerts:** You should check *OracleMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

**Self-Service Toolkit:** You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

## **Do Not Use Database Tools to Modify Oracle Applications Data**

*Oracle STRONGLY RECOMMENDS that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

## **About Oracle**

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems,

different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.



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## Introduction

This topic group provides an overview of the Oracle Quoting - Forms application and its components, and lists features and functionality new in this release.

- [Oracle Quoting Overview](#)
- [Oracle Quoting Features](#)
- [New in this Release](#)

## 1.1 Oracle Quoting Overview

Quoting allows users to create and manage quotes as a negotiation tool and, on receipt of customer agreement, to submit the quote as an order. In addition to acting as a single point of entry into Oracle Order Management, Quoting is an integral part of the CRM sales cycle.

Quoting enables you to perform actions such as creating new customer records, versioning and approving quotes, converting quotes into orders, and verifying product availability.

### 1.1.1 Oracle Quoting Features

Quoting provides you with the ability to:

- Create, modify, and delete quotes
- Configure items
- Price quotes
- Calculate taxes
- Check availability
- View customer and quote history
- View and modify orders
- Convert quotes to orders

## 1.2 New in this Release

Quoting contains the following new functionality in this release:

- Enhanced print quote functionality
- General Services Administration (GSA) Pricing
- Tax Exemption
- Security

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# Technology, Requirements, and Performance

This topic group contains an overview of the architecture and a description of the minimum software and hardware requirements of Oracle Quoting.

- [Architectural Overview](#)
- [Minimum Software Requirements](#)
- [Minimum Hardware Requirements](#)

## 2.1 Architectural Overview

Oracle Applications run on a three-tiered framework known as Internet Computing Architecture.

- The desktop tier provides the user interface display. In Internet Computing Architecture, only the presentation layer of the application is on this tier, in the form of a plug-in to a standard Internet browser.
- The middle tier, or application tier, manages Oracle applications and other tools.
- The database tier manages the Oracle8i database, which provides centralized storage and schema.

Quoting uses the Oracle Forms Server with web-deployed forms. The Forms Server mediates between the Forms Client, a Java applet running on the desktop tier, and the Oracle8i database server on the back end. The Forms Server and Forms Client exchange messages across a standard network connection, which may use either TCP/IP or HTTP.

The Forms Client displays only Web-deployed forms and provides field-level validation, multiple coordinated windows, and data entry aides. A Java-enabled web browser manages downloads, startup, and execution of the Forms Client on the desktop.

Another software component on the middle tier, the HTTP Server, starts a client session over the internal or external Web. The HTTP Server in 11i is the Apache HTTP Server.

## 2.2 Minimum Software Requirements

The following table lists the minimum software requirements for Quoting.

**Table 2-1 Minimum Software Requirements**

| <b>Tier</b>                  | <b>Software Required</b>                  |
|------------------------------|---|
| Desktop tier                 | Oracle JInitiator                         |
| Middle tier/application tier | Oracle Forms Server<br>Apache HTTP Server |
| Database tier                | Oracle8i Enterprise Edition (8.1.7)       |

## 2.3 Minimum Hardware Requirements

The following table lists the minimum hardware requirements for Quoting.

**Table 2–2** *Minimum Hardware Requirements*

| <b>Hardware</b> | <b>Minimum required</b>                   |
|-----------------|---|
| CPU             | 2 CPUs minimum, but 4 or more recommended |
| Memory          | 256 MB, but 1GB recommended               |
| Disk Space      | 22 GB                                     |



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# Dependency Requirements and Verification

This topic group provides information on the applications and modules that integrate with Oracle Quoting.

- [Mandatory Dependencies](#)
- [Conditional Dependencies](#)
- [Installation and Dependency Verification](#)

## 3.1 Mandatory Dependencies

Quoting requires that the following applications be installed and implemented.

- **Oracle Receivables** — Quoting obtains tax information and customer account information from Oracle Receivables. Refer to the *Oracle Receivables User Guide* for complete setup information.
- **Oracle Advanced Pricing** — Quoting uses Advanced Pricing to set up price lists, discounts, adjustments, and promotions. Refer to the *Oracle Pricing User's Guide* for complete setup information.
- **Oracle Bill of Materials** — Quoting uses Bill of Materials to access information about the components associated with a product. Refer to the *Bill of Materials User's Guide* for complete setup information.
- **Oracle General Ledger** — Quoting uses General Ledger to set up ledgers and books and store exchange rates. Refer to the *Oracle General Ledger User Guide* for complete setup information.
- **Oracle Inventory** — Quoting accesses the Availability to Promise (ATP) and reservation functions, and all item information from Inventory. Refer to the *Oracle Inventory User's Guide* for complete setup information.
- **Oracle Order Management** — Quoting uses Order Management to create orders out of quotes. You must set up the default Item Validation Organization for your operating unit in Order Management. This can be done in the Order Management application Setup > Parameter menu. Refer to the *Oracle Order Management Suite Implementation Manual* for complete setup information.

## 3.2 Conditional Dependencies

The following conditional dependencies provide desired functionality but are not required for Quoting to function.

- **Oracle Configurator** — Quoting uses Configurator to configure model items. Refer to the *Oracle Configurator Installation Guide* and *Oracle Configurator Implementation Guide* for complete setup information.
- **Oracle iPayment** — Quoting calls iPayment for credit card authorizations. Refer to the *Oracle iPayment Implementation Guide* for complete setup information.
- **Oracle Reports** — Quoting uses Reports to develop its print quote reports. Refer to *Oracle Reports Developer Getting Started* for complete setup information.

- **Oracle Service Contracts** — Quoting calls Oracle Service Contracts to access contract details for service items. Refer to the *Oracle Contracts for Service Implementation Guide* for complete setup information.
- **Oracle Service Installed Base** — Quoting accesses Service Installed Base for a list of all serviceable products and installation details. Refer to the *Oracle Service Implementation Guide* for complete setup information.

### 3.3 Installation and Dependency Verification

Please refer to the following documentation to ensure that all mandatory dependencies are installed and implemented correctly:

- *ERP Functional Checklist*
- *Implementing Oracle CRM: Foundation Functional Checklist*



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# Implementation Overview

This document provides general descriptions of the setup and configuration tasks required to successfully implement Oracle Quoting. Topics include:

- [Process Description](#)
- [Implementation Task Sequence](#)

## 4.1 Process Description

Sales representatives can use Quoting to create and manage quotes, and if approved by the customer, to transform those quotes into orders.

In order to effectively implement Quoting, you must perform the following tasks:

- Set up quote status
- Set lookup types
- Set system profile options
- Set up GSA Pricing

## 4.2 Implementation Task Sequence

In order to fully implement Quoting, you must perform the following steps:

1. Set up quote status and quote status transitions.  
Quoting is delivered with predefined quote statuses. You can define new quote statuses or modify the predefined statuses based on business needs.
2. Set up lookup types.  
You must identify and define lookup types based on your business needs.
3. Set up system profile options.  
You must define system profile options, which affect the way Quoting looks and performs, to fit your business needs.
4. Define descriptive flexfields.  
Descriptive flexfields are customizable, undefined fields on the Quoting form that the application developer can define as needed.
5. Set up print quote.  
To use print quote, you must first designate a printer. Also, if you require personalized print quote reports, you must customize the report in Report Builder.
6. Set up GSA Pricing.  
GSA is a customer classification that indicates that the customer is a U.S. government customer. If you want Quoting to detect GSA violations, you must set the necessary profile options.

**7. Create additional attachments document categories. Optional.**

Quoting supports one document category, which defaults into the Category field when you create an attachment. You can create additional document categories as needed.



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## Implementation Tasks

This topic group provides you with the steps necessary to implement Oracle Quoting.

- [Setting Up Quote Status and Quote Status Transitions](#)
- [Setting Up Lookup Types](#)
- [Setting System Profile Options](#)
- [Defining Descriptive Flexfield Information](#)
- [Setting Up the Print Quote Functionality](#)
- [Setting up GSA \(General Services Administration\) Pricing](#)
- [Creating Additional Attachments Document Categories](#)

## 5.1 Setting Up Quote Status and Quote Status Transitions

Use this procedure to perform the following tasks:

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

The status of a quote indicates its progress from the initial offer until the order is placed. As sales representatives work on a quote, they indicate its progress by changing the status. Quote status tells others in their group how negotiations with the customer are progressing. Depending on how you define your quote statuses, it can also determine what kind of changes a sales representative can make to the quote.

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

Quoting is delivered with predefined quote statuses. You can define new quote statuses or modify the predefined statuses based on business needs. Users need Quote Statuses to create quotes. Refer to *Oracle Quoting - Forms Concepts and Procedures* for an explanation of quote status.

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

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### Login

Log in to Oracle Forms.

### Responsibility

To perform these tasks, you must be logged in with the Quoting Sales Manager responsibility.

### Prerequisites

None

### Steps

1. Navigate to the Quote Status Setup window.

2. If you want to add a new quote status, then:
  - a. In the Quote Statuses region, select a blank entry line or a line below which you wish to insert the new entry.
  - b. Enter the status code. This is the internal name and is not to be seen by the user.
  - c. Enter the status name and status description. These are displayed in the list of values for users.
  - d. If you want the new status to create a version when the user updates and saves a quote, then check the **Auto Versioning** check box.
  - e. If you wish to enable a user to make changes to the quote, to add new quote lines or to modify prices, for instance, then check the **Update Allowed** check box.
  - f. If you wish to set time limits when this new status is available, then enter dates in the Effective From and Effective To fields.
  - g. Click **Save** on the toolbar.
3. If you wish to set up the rules that determine the permitted status transitions for a particular status, then:
  - a. In the Quote Statuses region, select the status you wish to set up.
  - b. In the Allowed Transition to Status region, use the Code LOV to select an allowable transition status. You can allow the status in the Quote Statuses region to transition to more than one status.
  - c. Repeat the previous step for each permitted transition status.
  - d. If you wish to disable an existing status, then uncheck the **Enabled** box.
  - e. Click **Save** on the toolbar.

## 5.2 Setting Up Lookup Types

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

### Login

Log in to Oracle Forms.

## Responsibility

To perform this task, you must be logged in with the Quoting Sales Manager responsibility.

## Prerequisites

None

## Steps

1. Choose Quick Codes and click **Open**.  
The Quoting Lookups window opens.
2. Choose **View > Query by Example > Run**.  
The window will display all Quoting lookup types. Use the down arrow key to scroll through them.
3. Set the lookup types using the standard procedure outlined in the *Oracle Applications User's Guide*.

The following tables describes the lookup types used in the implementation of Quoting.

**Table 5-1 Quoting Lookup Types**

| Lookup Type               | Description  |
|---------------------------|--|
| ASO_CUSTOMER_TYPE         | Defines customer type for sold-to, bill-to, and ship-to customers.   |
| ASO_DEFAULT_ORDER_STATE   | The default state of an order when the quote is passed to Oracle Order Management. The seeded values are Entered and Booked. Each triggers different Oracle Order Management validation. |
| ASO_DISCOUNTING_PRIVILEGE | Discounting privilege for manual discounting.  |
| ASO_EXT_VALUE_TYPE        | Data type of value for order line attribute. This lookup is used by an Quoting API for validation of VALUE_TYPE in ASO_QUOTE_LINE_ATTRIBS_EXT.   |
| ASO_FUNCTIONALITY_CODE    | Functionality code to be used in User Hooks. Not used — reserved for future use.   |

**Table 5–1 Quoting Lookup Types**

| <b>Lookup Type</b>           | <b>Description</b>  |
|------------------------------|---|
| ASO_GSA_PRICING              | Determines the level of error message for GSA violation   |
| ASO_HEADER_RELATIONSHIP_TYPE | Type of header relationships between quote headers. There is one seeded value: Copy. This lookup is used by an Quoting API for validation of RELATIONSHIP_TYPE in ASO_QUOTE_HEADER_RELATIONSHIPS. |
| ASO_ITEM_TYPE                | Item types for items which are added to the cart  |
| ASO_LINE_ATTRIBUTE_STATUS    | Status of an order line attribute. This lookup is used by an Quoting API for validation of STATUS in ASO_QUOTE_LINE_ATTRIBS_EXT.  |
| ASO_LINE_ATTRIBUTE_TYPE      | Type of order line attribute. This lookup is used by an Quoting API for validation of ATTRIBUTE_TYPE_CODE in ASO_QUOTE_LINE_ATTRIBS_EXT.  |
| ASO_LINE_RELATIONSHIP_TYPE   | Type of line relationship. This lookup is used by an Quoting API for validation of RELATIONSHIP_TYPE in ASO_QUOTE_LINE_RELATIONSHIPS.   |
| ASO_OBJECT_RELATIONSHIP_TYPE | Type of object relationship. This lookup is used by an Quoting API for validation of RELATIONSHIP_TYPE_CODE in ASO_QUOTE_RELATED_OBJECTS.   |
| ASO_OM_ACCESS_PRIVILEGE      | Determines mode of access to the Oracle Order Management form via the Customer History form   |
| ASO_ORDER_FEEDBACK_CRM_APPS  | CRM applications registered for order feedback. All applications listed here are informed of any changes to an order in Oracle Order Management.  |
| ASO_PARTY_OBJECT_TYPE        | Type of Party object (e.g. Contact Points) related to the Quote object. This lookup is used by an Quoting API for validation of PARTY_OBJECT_TYPE in ASO_QUOTE_PARTY.                             |

**Table 5–1 Quoting Lookup Types**

| <b>Lookup Type</b>         | <b>Description</b>  |
|----------------------------|---|
| ASO_PARTY_TYPE             | Type of party (Quote_to, Deliver_To). This lookup is used by an Quoting API for validation of PARTY_TYPE in ASO_QUOTE_PARTY.  |
| ASO_PAYMENT_OPTION         | Payment options available to users. Not used — reserved for future use.   |
| ASO_PAYMENT_TYPE           | Payment types available to users  |
| ASO_QUOTE_LINE_ATTRIBS_EXT | Name of an order line attribute. This lookup is used by an Quoting API for validation of NAME in ASO_QUOTE_LINE_ATTRIBS_EXT.  |
| ASO_QUOTE_OBJECT_TYPE      | Type of object (quote header identifier). This lookup is used by an Quoting API for validation of QUOTE_OBJECT_TYPE_CODE in ASO_QUOTE_OBJECT_RELATIONSHIPS.   |
| ASO_QUOTE_PARTIES          | Seeded lookup data required for migration in Sales  |
| ASO_QUOTE_SOURCE           | The source of the quote   |
| ASO_RELATED_OBJECT_TYPE    | Type of object (Contracts, Opportunity, Order) related to the quote. This lookup is used to validate OBJECT_TYPE_CODE in ASO_QUOTE_RELATED_OBJECTS. Lookup code OPPORTUNITY has been made obsolete in ASO Patchset G. Instead LDID will be used to relate an object of type "Opportunity" to a quote. |
| ASO_RESERVATION_TYPE       | Lookup values for Profile Option to decide at what level Reservation needs to be done.  |
| ASO_SERVICE_TYPE           | Service reference type code. A service must always be linked to an item or an item in the customer installed base. This list of values specifies where the item is. Seeded values include: Quote, Order, and Customer Product.  |

**Table 5–2 Obsolete Quoting Lookup Types**

| <b>Lookup Type</b>       | <b>Description</b>                 |
|--------------------------|------------------------------------|
| ASO_CONTACT_PROFILE_TYPE | Profile type of a customer contact |

**Table 5–2 Obsolete Quoting Lookup Types**

| <b>Lookup Type</b>          | <b>Description</b>                                      |
|-----------------------------|---|
| ASO_ORDER_LINE_STATUESES    | Status of an order line                                 |
| ASO_ORDER_STATUSES          | Order status  |
| ASO_PARTY_RELATIONSHIP_TYPE | Type of party relationship                              |
| ASO_QUOTE_RELATED_OBJECTS   | Seeded lookup data required for data migration in Sales |
| ASO_RETURN_FOR              | Reasons for returns                                     |
| ASO_UNIVERSAL_SEARCH        | Types of universal search                               |

## 5.3 Setting System Profile Options

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

### Login

Log in to Oracle Forms.

### Responsibility

To perform this task, you must be logged in with the System Administrator responsibility.

### Prerequisites

None.

### Steps

1. Navigate to **Profile > System**.

The Find System Profile Values window opens.

2. Check the **Site** box.
3. Enter ASO% in the **Profile Name** field.
4. Click the **Find** button.

The System Profile Values window opens, displaying all existing Quoting profile options.

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

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**Note:** Profile Options marked with an asterisk (\*) are mandatory. Profile Options marked with a double asterisk (\*\*) are conditionally mandatory.

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## 5.4 Defining Descriptive Flexfield Information

Descriptive flexfields are customizable, blank fields on the Quoting form that allow the application developer to enter additional fields as needed. A descriptive flexfield is composed of segments, each of which has a prompt and may have either a valid set of values or data entered by the customer. Quoting descriptive flexfields are located in the header level, next to the Status field, and in the line level, next to the Extended Price field. They are represented by an unnamed field enclosed in brackets.

Use this procedure to determine the use of your descriptive flexfields and to make changes to your flexfield values.

### Login

Log in to Oracle Forms.

### Responsibility

To perform this task, you must use the Application Developer responsibility.

### Prerequisites

None.

### Steps

1. Choose **Flexfield > Descriptive > Segments**.

The Descriptive Flexfield form opens.

2. From the View menu, choose **Query by Example > Enter**.

3. Type Order Capture into the field and choose **Query by Example > Run** from the View menu.

The Oracle Quoting descriptive flexfield records are displayed.

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**Note:** In order for flexfields to exist on the quote once it becomes an order, the application developer must set up the flexfields in Order Management the same as in Oracle Quoting. Therefore you must repeat this procedure a second time using Order Management as the application.

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4. Uncheck the Freeze Flexfield Definition box. This is necessary to make and save changes to the flexfield information.
5. Enter the Title field.

This value is the Title that will show up on the flexfield pop up window.

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**Note:** The content allowed in the Title field and the Context section fields is limited by the Value Set. For more information on value sets, refer to the *Oracle Applications Flexfield Guide*.

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6. Enter the necessary information into the Context Field section.

This section determines the context of the flexfield.

- Enter a Prompt into the Context field section.

This Prompt appears in a flexfield form if you have permitted override by placing a check in the override allowed box.

- Enter a Default Value, if necessary.

This default value determines which descriptive flexfield structure is displayed. Your flexfield automatically uses this default value if no reference field is defined.

- Enter a Reference Field value, if necessary.

This is the reference field from which the flexfield can automatically derive the context value field. Application developers can choose from a predefined list or create their own reference fields. For more information, refer to the *Oracle Applications Flexfield Guide*.

- Choose whether or not to require a Context Field Value by checking or unchecking the Value Required box.

If a value is required, the user cannot leave the flexfield form without entering a valid value.

- Choose whether or not the user can override the context value derived from a reference field or default value by checking or unchecking the Override Allowed box.

If the user can change this value, the flexfield form displays the designated context window Prompt. If overrides are not allowed, the flexfield value is determined by the reference field or default value.

7. Enter as many values as necessary into the Context Field Values section or leave the field blank to allow the user to enter their own value.

Each value in this section is part of an LOV on the flexfield pop up window, from which the user can choose.

8. Click **Segments**.

The Segments Summary form opens.

9. Enter a name for the segment in the first available Name field.

10. Enter a Window Prompt for the segment.

11. Optionally, use the LOV to enter the column the segment should map to.

12. Click **Value Set** to set the values and close this form.

13. In the descriptive flexfield form, place a check in the Freeze Flexfield Definition box.

This is necessary to save all of the changes made in this form.

14. Click **Compile** to apply your changes and close the main descriptive flexfield form.

## 5.5 Setting Up the Print Quote Functionality

Before using Print Quote you must install and designate a default printer. For complete directions on Installing a Printer, see the *Oracle Applications System Administrator's Guide*.

### 5.5.1 Designating a Printer for Print Quote

#### Login

Log in to Oracle Forms.

### Responsibility

To perform this task, you must use the Application Developer responsibility.

### Prerequisites

None.

### Steps

1. Choose **Concurrent > Program**.

The Concurrent Programs window opens.

2. Choose **View > Query by Example > Enter**.

3. Enter `Print Quote` in the Program field.

4. Choose **View > Query by Example > Run**.

Quoting displays the Print Quote record. The default printer is located in the Output section in the lower right corner.

5. To change the printer, click on the LOV in the printer field.

A window opens, displaying all printers that are set up in Oracle Forms.

6. Choose the printer you want your Print Quote reports to print on.

7. Click **OK**.

8. Close the window.

## 5.5.2 Customizing the Print Quote Report

Currently, you can customize the print quote report with your company logo and address. You must first update the report with your information in Oracle Report Builder.

For more information on Oracle Reports and Oracle Report Builder, see *Oracle Reports Developer Building Reports* or *Oracle Reports Developer Reference Manual*.

### Login

Log in to Report Builder.

### Responsibility

To perform this task, you must use the System Administrator responsibility.

## Prerequisites

None.

## Steps

1. Log in to Report Builder.
2. Choose **Open** from the File menu.
3. Locate the report named **ASOPQTER.rdt** and click **Open**.
4. Click the plus sign to the left of the report name to expand the report options.
5. Double-click on Layout Model to open the layout.

The Oracle Reports layout window opens.

6. Click **Edit Margin**.

The margin layout appears.

- a. To edit the Company Address:

- \* Click on the Company Address text.

A text box appears around the Company Address text and you are now able to edit it.

- \* Type your company's address.

- \* Click the Save icon.

- b. To edit the company logo:

- \* Delete the Company Logo textbox

- \* Place your cursor on or near the company logo text.

- \* From the File menu, choose **Import > Image**.

- \* Browse for your logo file.

- \* Click **OK**.

- \* Click on the company logo.

A box appears around the company logo image and you are now able to edit it.

- \* Click the Save icon.

## 5.6 Setting up GSA (General Services Administration) Pricing

GSA is a customer classification that indicates that the customer is a U.S. government customer. Specific GSA price lists for the customers must be set up in Pricing. Items listed on the GSA price list cannot be sold to commercial customers for the same price or less than the government.

Quoting responds to GSA violations based on the application level profile option ASO: GSA Pricing. As a default, the profile option is set to Null, which means that the application is not performing GSA violation checks. If the profile option is set to Warning and a non-GSA customer receives a unit net price that is lower than the GSA price, a violation warning appears stating that there is a GSA violation. If the profile option is set to Error, the user will be prevented from updating or saving the quote. In either case, if a GSA violation occurs, an error message appears identifying the quote lines in which the violation occurred.

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**Note:** To enable GSA validation, you must set the Pricing profile option QP: Verify GSA to yes.

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Refer to the *Oracle Pricing User's Guide* for more information.

## 5.7 Creating Additional Attachments Document Categories

Quoting currently supports one document category, Miscellaneous, which automatically defaults into the Document Category field when you create a new attachment. Yet, you can create other customized categories to meet your business needs.

The following procedure allows you to add new document categories for attachments and associate them with Quoting.

### Login

Log in to Oracle Forms.

### Responsibility

To perform this task, you can use either the Application Developer responsibility or the Order Management Super User responsibility.

## Prerequisites

None

## Steps

1. Log in to Oracle Forms.
  - If you logged in to Oracle Forms using the Application Developer responsibility, than choose **Attachments > Document Categories** from the Navigator.
  - If you logged in to Oracle Forms using the Order Management Super User responsibility, then choose **Setup > Orders > Attachments > Document Categories**.

The Document Categories form opens.

2. Enter a name for your new document category.
3. Select a datatype from the Default Datatype LOV.

The possible datatypes are:

- Short Text
  - Long Text
  - Web Page
  - File
  - Document Reference
4. Select effective dates for the category using the From and To LOVs.
  5. Click **Assignments**.

The Category Assignments form opens.
  6. Select **Function** from the Type LOV.
  7. Select **Quoting** from the Name LOV.
  8. Optionally, select a format from the Format LOV.
  9. Ensure that the Enabled box is checked.
  10. Click the Save icon.
  11. Close the form.

Your new document category now appears as an option in the Category field on the Attachments form.

For more information on setting up attachments, refer to the latest release of the *Oracle Application Developer's Guide*. For more information on using attachments, refer to *Oracle Quoting - Forms Concepts and Procedures* or *Oracle Applications User's Guide*.



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# Verifying the Implementation

This topic group provides you with steps necessary to verify implementation of Oracle Quoting.

- [Oracle Quoting Implementation Verification Tasks](#)

## 6.1 Oracle Quoting Implementation Verification Tasks

To verify that you properly implemented Quoting, perform the following tasks.

For information on how to perform these procedures, see *Oracle Quoting - Forms Concepts and Procedures*.

1. Create a complex quote.
  - Add and configure a model item.
  - Check item availability.
  - Convert the quote into an order.

You should receive confirmation that your order was submitted. Verify that the procedure was successful in Order Management.

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## Diagnostics and Troubleshooting

This topic group provides troubleshooting information for the implementation and use of Oracle Quoting.

- [Troubleshooting](#)
- [How to Set up Debugging when Logging an iTar to Send to Support](#)
- [Order Feedback Queue Frequently Asked Questions](#)

## 7.1 Troubleshooting

If you have any problems using Quoting:

- Make sure that Quoting is fully installed.
- Recompile the server objects.
- After recompiling server objects, regenerate forms and libraries.

## 7.2 How to Set up Debugging when Logging an iTar to Send to Support

Use the following procedures to set up debugging in Quoting.

### 7.2.1 Setting Up Debug File Location

The debug file will help Oracle easily debug the cause of your problem. This is mandatory for all bugs logged against Quoting Patchset E or later.

#### Steps

1. Ensure that the Order Management profile `OE_DEBUG_LOG_DIRECTORY` is set.
2. Ensure that the profile value used above matches the `utl_file_dir` parameter of `init.ora`

### 7.2.2 How to Use Debugger From the Quoting Main Form

Use the following procedure to employ the debugger in the main Quoting form.

#### Steps

1. Check **ASO Debug** under Tools menu.
2. Note the debug file name and location.
3. Execute the steps necessary to reproduce the bug.

The debug file is generated in the directory mentioned in the Order Management profile `OE_DEBUG_LOG_DIRECTORY`.

### 7.2.3 How to Use Debugger in SQL Scripts

Use the following procedure to employ the debugger in SQL scripts.

## Steps

1. Use the following statements at the start of your SQL script:

```
aso_debug_pub.initialize;
    aso_debug_pub.debug_on;
    aso_debug_pub.setdebuglevel(10);
    l_file      := aso_debug_pub.set_debug_mode('FILE');
    dbms_output.put_line('File :'||l_file);
```

2. Execute the SQL script to reproduce the bug.
3. Note the debug file name and location.
4. The debug file will get generated in the directory mentioned in the Order Management profile OE\_DEBUG\_LOG\_DIRECTORY.

## 7.3 Order Feedback Queue Frequently Asked Questions

**Question:** The queue table ASO\_ORDER\_FEEDBACK\_T is growing in size. How do I stop it from growing?

**Answer:** Log in to Oracle Forms using the Oracle Quoting Sales Manager responsibility and navigate to QuickCodes. Delete or disable all the lookup entries for lookup 'ASO\_ORDER\_FEEDBACK\_CRM\_APPS'.

**Question:** The install base concurrent program is reading the rows from the queue table. Why are the rows read by the concurrent program still there?

**Answer:** The messages are being removed by the Installed Base program, but new messages that are queuing for different consumers are not being dequeued or inspected at all. This happens if there is a registered consumer in the ASO lookup (ASO\_ORDER\_FEEDBACK\_CRM\_APPS) for which there is no dequeuing program. Delete or disable all the lookup entries except for Install Base for lookup 'ASO\_ORDER\_FEEDBACK\_CRM\_APPS' in the QuickCodes form.

**Question:** The queue table is growing in size. I do not need the queue table because I do not have any CRM applications that depend on it. How can I remove all the rows in the table?

**Answer:** Perform the following tasks:

- Log in to Oracle Forms using the Oracle Quoting Sales Manager responsibility and navigate to QuickCodes. Delete or disable all the lookup entries for lookup 'ASO\_ORDER\_FEEDBACK\_CRM\_APPS'.
- Apply ARU bug 1449198 which drops the queue table and recreates it.

**Question:** The Installed Base Interface Concurrent Program completes with an error status with a fatal exception from the ASO\_ORDER\_FEEDBACK\_GET\_PVT API. FND\_AS\_UNEXPECTED\_ERROR (PKG\_NAME=ASO\_ORDER\_FEEDBACK\_GET\_PVT) (PROCEDURE\_NAME=GET\_NOTICE) (ERROR\_TEXT=ORA-00600: internal error code, arguments: [koxsi2sz1], [13], [], [], [], [], []). What does this mean?

**Answer:** This error occurs because of bug 1424051 in RDBMS. Customers have to apply a patch to avoid this problem. The only workaround is to drop the rows in the table. For this, a standalone ARU 1449198 needs to be applied which will drop and recreate the queue.

**Question:** Bug 1816891: Placing an order in OM or OC throws the error: FND\_AS\_UNEXPECTED\_ERROR (PKG\_NAME=ASO\_ORDER\_FEEDBACK\_UPDATE\_PVT) (PROCEDURE\_NAME=UPDATE\_NOTICE) (ERROR\_TEXT=ORA-25207: enqueue failed, queue ASO.ASO\_OF\_Q is disabled from enqueueing). Why does this happen?

**Answer:** This error occurs because the queue is not enabled for enqueueing. The following SQL commands need to be run as APPS user to enable the queue for enqueueing and dequeuing:

```
execute dbms_aqadm.start_queue('ASO.ASO_OF_Q', TRUE, TRUE);
execute dbms_aqadm.start_queue('ASO.ASO_OF_Q_E', FALSE, TRUE);
execute dbms_aqadm.start_queue('ASO.ASO_OF_EXCP_Q', TRUE, TRUE);
execute dbms_aqadm.start_queue('ASO.ASO_OF_EXCP_Q_E', FALSE, TRUE);
```

**Question:** Bug 1897375: Placing an order in OM or OC throws an error: 100501 - non-Oracle Exception. The debug file shows the error. FND\_AS\_UNEXPECTED\_ERROR (PKG\_NAME=ASO\_ORDER\_FEEDBACK\_UPDATE\_PVT) (PROCEDURE\_NAME=UPDATE\_NOTICE) (ERROR\_TEXT=ORA-06502: PL/SQL: numeric or value error: character to number conversion error). Why does this happen?

**Answer:** The error occurs when the profile value ASO: Order Feedback Queue Retention Time was set to a character string.

The profile value ASO: Order Feedback Queue Retention Time is used to determine how long the message is retained in the Order Feedback Queue. Either the value should be null (the message never expires) or a number in seconds. Set the profile value to null or a large number.



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## Oracle Quoting Profile Options

This chapter describes the profile options that you need to set when implementing Oracle Quoting.

- [Current Oracle Quoting Profile Options](#)
- [Obsolete Quoting Profile Options](#)

## A.1 Current Oracle Quoting Profile Options

When implementing Quoting, you must set certain profile options, which affect the appearance and performance of the application.

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**Note:** Profile options with an asterisk are mandatory. Profile options with a double asterisk are conditionally mandatory.

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The following tables list descriptions and default values for each of the Quoting profile options.

**Table A-1 ASO Profile Options for Configurator Integration**

| Profile Option          | Description  | Default Value |
|-------------------------|--|---------------|
| **ASO: Configurator URL | <p>This profile specifies the URL for the Configurator window.</p> <p>This profile is mandatory if Oracle Configurator is used for product configurations.</p> <p>If this profile value is null, then no default value is assumed.</p> | N/A           |

**Table A-2 ASO Profile Options for Contracts Core Integration**

| Profile Option            | Description   | Default Value |
|---------------------------|---|---------------|
| ASO: Enable Use Contracts | <p>This profile option enables Quoting to integrate with Contracts Core.</p> <p>If this profile is set to <b>Yes</b>, Contracts integration is enabled.</p> <p>If this profile is set to <b>No</b>, Contracts integration is disabled.</p> <p>If this profile is null, then a value of No is assumed.</p> | No            |

**Table A-3 ASO Profile Options for Item ATP Integration**

| Profile Name                       | Description  | Default Value |
|------------------------------------|--|---------------|
| **ASO: ATP Default Customer ID     | These profiles are set to a cust_account_id and cust_account_site_use_id (where site_use = Ship_To) values respectively. They are used to determine the sourcing rules, when no ship-to site exists for the quote. These profiles must be used in conjunction with each other.   | N/A           |
| **ASO: ATP Default Ship To Site ID | <p>If ATP is performed before selecting a ship-to site, these default values are used. If a ship-to site is selected, then the cust_account_site_use_id is used for the ATP check, only if the selected site is known to MRP. If MRP is not aware of the selected ship-to site, then the cust_account_id and the cust_account_site_use_id specified in these profiles is used. Note: Even if MRP is aware of the customer and ship-to site, but there is no sourcing rule for the combination of customer and ship-to site, then a Global Sourcing Rule or a sourcing rule at the Item level must exist for ATP to work.</p> <p><b>Note:</b> You should not attempt to set these profiles if ASO: ATP Use Sourcing Rule is set to No.</p> <p>A value for these profiles is mandatory when ASO: ATP Use Sourcing Rule is set to Yes.</p> <p>If these profile values are null, then no default values are assumed.</p> | N/A           |

**Table A-3 ASO Profile Options for Item ATP Integration**

| <b>Profile Name</b>          | <b>Description</b>   | <b>Default Value</b> |
|------------------------------|--|----------------------|
| ASO: ATP Use Sourcing Rule   | <p>This profile determines if sourcing rules are used to derive the inventory organizations on which ATP needs to be done.</p> <p>Sourcing rules are defined in MRP. Please refer to the <i>Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User Guide Release 11i</i>.</p> <p>If this profile is set to <b>Yes</b>, ATP is calculated based on sourcing rules.</p> <p>If this profile is set to <b>No</b>, the sourcing rules are not used and the ATP check is restricted to the inventory Organization specified in the profile ASO: Default Ship From Org.</p> <p>If this profile value is null, then the default value NO is assumed.</p> | No                   |
| ASO: Automatic ATP Check     | <p>Determines whether ATP check is performed automatically for an item in the Item View tab.</p> <p>If this profile is set to <b>Yes</b>, an ATP check is performed automatically when an item is added to the quote.</p> <p>If this profile is set to <b>No</b>, the ATP check is skipped.</p> <p>If this profile value is null, a default value of No is assumed.</p>  | No                   |
| **ASO: Default Ship From Org | <p>This profile is used to identify the physical warehouse against which ATP and reservation are performed.</p> <p>This profile is mandatory if ATP and Reservations are performed.</p> <p>If this profile value is null, then no default value is assumed.</p>  | N/A                  |

**Table A–4 ASO Profile Options for Item Reservation Integration**

| <b>Profile Option</b>          | <b>Description</b>   | <b>Default Value</b> |
|--------------------------------|--|----------------------|
| **ASO: Reservation Level       | <p>This profile determines the level at which item reservations are performed. Items can be reserved manually, or automatically when the order is submitted.</p> <p>This profile is mandatory if reservations are performed.</p> <p>If this profile is set to <b>AUTO_ORDER</b>, a reservation is made when an order is placed.</p> <p>If this profile is set to <b>MANUAL</b>, reservations must be entered manually.</p> <p>If this profile value is null, a default value of Manual is assumed.</p> | Manual               |
| **ASO: Transaction Source Type | <p>This profile is used to specify the source type used for reserving items. The source type is set up in Manufacturing and Distribution, logged in as the manager responsibility, by navigating to Inventory &gt; Setup &gt; Transaction Source Type.</p> <p>This profile is mandatory if reservations are performed.</p> <p>If this profile value is null, no default value is assumed.</p>  | N/A                  |

**Table A-5 ASO Profile Options for Order Feedback**

| <b>Profile Option</b>                    | <b>Description</b>  | <b>Default Value</b> |
|--|---|----------------------|
| ASO: Order Feedback Queue Retention Time | <p>This profile determines the length of time that messages are retained in the order feedback queue.</p> <p>The value of this profile is measured in seconds. Therefore, you should set the profile value to null (the message never expires) or a large number. This depends on your business needs and the applications that are interested in the information in the queue.</p> <p><b>Caution:</b> It is very important that you enter a value for this profile, because your queue can grow extremely large.</p> <p>If this profile value is null, the message will be retained in the queue indefinitely.</p> | N/A                  |

**Table A-6 ASO Profile Options for Manual Discounts**

| <b>Profile Option</b>      | <b>Description</b>   | <b>Default Value</b> |
|----------------------------|--|----------------------|
| ASO: Discounting Privilege | <p>This profile option allows the user to make manual adjustments to the price returned from the pricing engine.</p> <p>If this profile is set to <b>Full</b>, the user can manually adjust a price by changing the Unit Net Price in the Quoting UI.</p> <p>If this profile is set to <b>None</b>, the user cannot manually adjust a price by changing the Unit Net Price in the Quoting UI.</p> <p>If this profile is null, then a value of No is assumed.</p> | No                   |

**Table A-7 ASO Profile Options for Order Integration**

| <b>Profile Option</b>        | <b>Description</b>  | <b>Default Value</b> |
|------------------------------|---|----------------------|
| *ASO: Default Order State    | <p>This profile is used to determine the state of the order (booked or entered) when created from a quote.</p> <p>If this profile value is null, the default value of booked is assumed.</p>  | Booked               |
| **ASO: Default Return Reason | <p>This profile is used to default a reason for returning an item, if no reason is specified by the customer.</p> <p>This profile is mandatory for all return lines.</p> <p>If this profile value is null, then no default value is assumed.</p>  | N/A                  |
| **ASO: Default Salesrep      | <p>This profile is used to default in an employee_person_id for the sales rep on the order, when a quote is converted to an order. This default salesrep receives 100 percent credit by default.</p> <p>This profile is mandatory when the ASO: Validate Salesrep profile is set to No.</p> <p>If this profile value is null, then no default value is assumed.</p> | N/A                  |

**Table A-7 ASO Profile Options for Order Integration**

| <b>Profile Option</b>       | <b>Description</b>   | <b>Default Value</b> |
|-----------------------------|--|----------------------|
| ASO: OM Defaulting          | <p>This profile is used to determine whether Oracle Order Management should default values (as per rules set up in Oracle Order Management) for the following attributes of an order, when creating an order from a quote: salesrep_id, order_type_id, payment_term_id, fob_code, freight_terms_code, and shipment_priority_code.</p> <p>If this profile is set to <b>No</b> and a quote is created with null values for the above fields, the corresponding order shows these fields as null, except for salesrep_id, which is defaulted with a value from the Salesrep profile option.</p> <p>If this profile is set to <b>Yes</b> and a quote is created with null values for the above fields, the corresponding order will have values defaulted into the fields, as per the Order Management defaulting rules.</p> | No                   |
| *ASO: Quote Conversion Type | <p>This profile specifies the conversion type for getting the daily conversion rate while creating an order from a quote. The conversion type is used to derive the daily conversion rate from Oracle General Ledger if the OM: Set of Books profile currency is different from the currency used to create the quote.</p> <p>If this profile value is null, no default value is assumed.</p>  | N/A                  |

**Table A-7 ASO Profile Options for Order Integration**

| <b>Profile Option</b>   | <b>Description</b>  | <b>Default Value</b> |
|-------------------------|---|----------------------|
| *ASO: Validate Salesrep | <p>This profile is used to determine whether a Sales rep must be specified on the quote prior to creating an order.</p> <p>If this profile is set to <b>Yes</b>, a sales representative must be specified on the quote prior to creating an order.</p> <p>If this profile is set to <b>No</b>, then a sales representative will be defaulted from ASO: Default Salesrep.</p> <p>If this profile value is null, a default value of Yes is assumed.</p> | Yes                  |

**Table A-8 ASO Profile Options for OTS Integration**

| <b>Profile Option</b>                | <b>Description</b>  | <b>Default Value</b> |
|--------------------------------------|---|----------------------|
| ASO: Default E-Business Quote Screen | <p>This profile specifies the quote form that is launched for Sales for Communications.</p> <p>If this profile is set to <b>Order Capture</b>, then the Quoting form launches.</p> <p>If this profile is set to <b>Order Capture Navigator</b> or <b>Order Workbench</b>, then the respective Sales for Communications forms launch.</p> <p>If this profile value is null, a default value of Order Capture is assumed.</p> | Order Capture        |
| ASO: Default E-Business Order Screen | <p>This profile specifies the Sales Orders form that launches for Sales for Communications.</p> <p>If this profile is set to <b>Order Organizer View</b>, then the Order Management Sales Orders form opens.</p> <p>If this profile is set to <b>Order Details</b>, then the Sales for Communications Sales Order form opens.</p>   | None                 |

**Table A-8 ASO Profile Options for OTS Integration**

| <b>Profile Option</b> | <b>Description</b>   | <b>Default Value</b> |
|-----------------------|--|----------------------|
| ASO: Enable ASO Debug | <p>This profile is only accessible at site level and is defined to enable the ASO debug messages for a single session.</p> <p>If this profile is set to <b>Yes</b>, then ASO debug messages are recorded in the folder specified in Order Management's profile.</p> <p>If this profile is set to No, then no debug file is recorded.</p> | No                   |

**Table A-9 ASO Profile Options for Payments Integration**

| <b>Profile Option</b>          | <b>Description</b>  | <b>Default Value</b> |
|--------------------------------|---|----------------------|
| ASO: Credit Card Authorization | <p>This profile determines whether the application does a credit card authorization when creating an order from a quote.</p> <p>If this profile is set to <b>Yes</b>, then the credit card is authorized when creating an order from a quote.</p> <p>If this profile is set to <b>No</b>, no credit card authorization is performed.</p> <p>If this profile value is null, then a default value of No is assumed.</p> | No                   |
| **ASO: Receipt Method          | <p>This profile determines the receipt method for credit card authorization.</p> <p>This profile option is mandatory when ASO: Credit Card Authorization is set to Yes.</p> <p>If this profile value is null, no default value is assumed.</p>  | N/A                  |

**Table A–10 ASO Profile Options for Pricing**

| <b>Profile Option</b> | <b>Description</b>   | <b>Default Value</b> |
|-----------------------|--|----------------------|
| ASO: GSA Pricing      | <p>This option allows users to check the GSA violation returned by the Pricing engine.</p> <p>If this profile is set to <b>Warning</b>, then it checks for a GSA violation and returns a warning message to the user, yet the transaction continues.</p> <p>If this profile is set to <b>Error</b>, then it checks for a GSA violation and returns an error message to the user, and rolls back the transaction.</p> <p>If this profile value is null, GSA violation checks are ignored.</p> | N/A                  |

**Table A–11 ASO Profile Options for Quotes**

| <b>Profile Option</b>    | <b>Description</b>  | <b>Default Value</b> |
|--------------------------|---|----------------------|
| ASO: Automatic Numbering | <p>Determines if the system automatically generates a quote number.</p> <p>If this profile is set to <b>Yes</b>, a new quote number is generated by the system.</p> <p>If this profile is set to <b>No</b>, the user must specify the quote number.</p> <p>If this profile value is null, the user must specify the quote number.</p> | Yes                  |

**Table A-11 ASO Profile Options for Quotes**

| <b>Profile Option</b>             | <b>Description</b>  | <b>Default Value</b> |
|-----------------------------------|---|----------------------|
| *ASO: Create Customer Account     | <p>This profile option enables creation of customer accounts and customer account relationships.</p> <p>If this profile is set to <b>Yes</b>, Quoting automatically creates accounts and account relationships, if none exist, at the time of creating or updating a quote.</p> <p>If this profile is set to <b>No</b>, Quoting will mandate that a valid account relationship exist in order to be able to create or update a quote.</p> | Yes                  |
| *ASO: Default Currency Code       | <p>One of the two profile options that determine the currency of the transactions in the application. The currency defined in ASO: Default Order Type takes precedence over this profile option.</p> <p>If this profile value is null, the default value USD is assumed.</p>  | USD                  |
| ASO: Default Customer Type        | <p>This profile option determines the Customer Type (person or organization) field for the sold-to, bill-to, and ship-to customers.</p> <p>If this profile is set to <b>Person</b>, the customer type of the sold-to, bill-to, and ship-to customers will default to person.</p> <p>If this profile is set to <b>Organization</b>, the customer type of the sold-to, bill-to, and ship-to customers will default to organization.</p>     | Organization         |
| ASO: Default Ordered Qty in OC UI | <p>This profile determines the default quantity that appears in the QTY field of the Quoting window.</p> <p>If this profile value is null, a default quantity of 1 is assumed.</p>  | 1                    |

**Table A–11 ASO Profile Options for Quotes**

| <b>Profile Option</b>     | <b>Description</b>   | <b>Default Value</b> |
|---------------------------|--|----------------------|
| ASO: Default Quote Status | <p>This profile determines the default status of a new quote.</p> <p>If this profile value is null, a default value of Draft is assumed.</p>   | Draft                |
| ASO: Enable Line Payments | <p>This profile allows the user to make payments at the line level. Currently, line level payments are not supported, hence this profile should always be set to <b>No</b> at the site level.</p> <p>This profile is non-updateable.</p> <p>Note: If the customer has customized these profiles, the system administrator needs to change the profile property to make them updateable, change the value of both the profiles to be <b>No</b> at all levels, and make the profiles non-updateable again to prevent any accidental updates.</p>                             | No                   |
| ASO: Enable Split Payment | <p>This profile allows the user split payments at the header level across multiple payment methods. Currently, split payments are not supported, hence this profile should always be set to <b>No</b> at site level.</p> <p>This profile will be non-updateable.</p> <p>Note: If the customer has customized these profiles, the system administrator needs to change the profile property to make them updateable, change the value of both the profiles to be <b>No</b> at all levels, and make the profiles non-updateable again to prevent any accidental updates.</p> | No                   |

**Table A–11 ASO Profile Options for Quotes**

| <b>Profile Option</b> | <b>Description</b>   | <b>Default Value</b> |
|-----------------------|--|----------------------|
| ASO: Quote Duration   | <p>This profile specifies the minimum length of time a quote remains valid. The Quoting UI uses this value to calculate the Expiration Date if the user does not specify one.</p> <p>If this profile value is null, a duration of 30 is assumed.</p> | 30                   |

**Table A–12 ASO Profile Options for Quote/Order Integration**

| <b>Profile Option</b>    | <b>Description</b>  | <b>Default Value</b> |
|--------------------------|---|----------------------|
| *ASO: Default Order Type | <p>This profile determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. This profile also determines what price list and currency code appear by default in the main Quoting form.</p> <p>If this profile value is null, no default value is assumed.</p> <p><b>Note:</b> Set up of this profile is mandatory for tax calculations.</p>  | N/A                  |
| ASO: Enable TCA Changes  | <p>This profile will enable the new validation/derivation logic related to the TCA attributes in the Quoting APIs. This profile should only be used internally by the development teams and should not be set by customers.</p> <p>If this profile is set to <b>Yes</b>, the new validation/derivation logic is executed.</p> <p>If this profile is set to <b>No</b>, the old validation/derivation logic will not be executed.</p> <p>If this profile value is null, a default value of No is assumed.</p> | No                   |

**Table A-13 ASO Profile Options for Security**

| <b>Profile Option</b>      | <b>Description</b>  | <b>Default Value</b> |
|----------------------------|---|----------------------|
| ASO: Enable Security Check | <p>This profile turns the Quoting security on or off. It is set at the site level.</p> <p>If this profile is set to <b>Yes</b>, the security profile is turned on. This means that the sales representatives who log in to OC can query and update only their own quotes, unless they are assigned a manager role.</p> <p>If this profile is set to <b>No</b>, the security profile is turned off. All users can query and update all quotes.</p> <p>If this profile value is null, a value of No is assumed.</p> | No                   |
| ASO: Enable Submit Button  | <p>This profile decides which users can submit orders.</p> <p>If this profile is set to <b>Yes</b>, users can submit an order even if they do not have a manager role assigned to their role type.</p> <p>If this profile is set to <b>No</b>, the submit button is disabled and users cannot submit orders.</p>  | No                   |
| ASO: Role Type             | <p>This profile is used to assign role types to a user. Role types are populated from fnd lookup, where lookup type is JTF_RS_ROLE_TYPE.</p> <p>If this profile is null for a user, that user will be outside of the security system even if the security profile is set to Yes.</p>  | N/A                  |

**Table A-13 ASO Profile Options for Security**

| <b>Profile Option</b> | <b>Description</b>  | <b>Default Value</b> |
|-----------------------|---|----------------------|
| ASO: OM Access        | <p>This profile determines the mode of access to Oracle Order Management forms via the Customer History form. Access can be Full or Read Only. These values are based on the lookup type ASO_OM_ACCESS_PRIVILEGE.</p> <p>If this profile is set to <b>Full</b>, the user can update an order in the Oracle Order Management form.</p> <p>If this profile is set to <b>Read Only</b>, the user can only view an order in the Oracle Order Management form.</p> <p>If this profile value is null, a value of Full is assumed.</p> | Full                 |

**Table A-14 ASO Profile Options for Tax Integration**

| <b>Profile Option</b>                            | <b>Description</b>   | <b>Default Value</b> |
|--|--|----------------------|
| * ASO: Email Address to send Diagnostic Messages | <p>This profile option determines whether the application sends an email containing debug statements and AR global variables when there is an exception in the Order Capture Tax API.</p> <p>If this profile is set to <b>Yes</b>, then an email is sent to the email address specified in the profile.</p> <p>If this profile is set to <b>No</b>, then no email is sent when there is an exception in Order Capture Tax API.</p> <p>This profile is only accessible at site level.</p> | No                   |

**Table A–14 ASO Profile Options for Tax Integration**

| <b>Profile Option</b>         | <b>Description</b>  | <b>Default Value</b> |
|-------------------------------|---|----------------------|
| * ASO: Enable Email for Debug | <p>This profile enables/disables email functionality.</p> <p>If this profile is set to <b>Yes</b>, then a workflow engine is called to send an email to the address specified in the profile option.</p> <p>If this profile is set to <b>No</b>, email functionality is disabled.</p> <p>This profile is only accessible at site level.</p>   | No                   |
| *ASO: Enable Tax View         | <p>It determines whether tax integration in the Quoting tax API is used.</p> <p>If this profile is set to <b>Yes</b>, then Old Tax Integration which uses a tax view <code>aso_i_tax_lines_summary_v</code> is activated.</p> <p>If this profile is set to <b>No</b>, then the New Tax Integration API, which does not use tax view <code>aso_i_tax_lines_summary_v</code>, is called.</p> <p><b>Note:</b> This profile is only accessible at site level.</p> | No                   |

**Table A-15 ASO Profile Options for Trade-Ins**

| <b>Profile Option</b> | <b>Description</b>  | <b>Default Value</b> |
|-----------------------|---|----------------------|
| ASO: Enable Line Type | <p>This profile allows the use to enter line types and categories. Some installations may not want the functionality for trade-ins and would therefore turn the profile off.</p> <p>If this profile is set to <b>Yes</b>, lines types and categories are enterable in the Quoting UI.</p> <p>If this profile is set to <b>No</b>, line types and categories are not enterable and the default line category "ORDER" is in effect in the Quoting UI.</p> <p>If this profile value is null, a default value of No is assumed.</p> | No                   |

## A.2 Obsolete Quoting Profile Options

The following table lists the Quoting profile options that are obsolete in this release.

**Table A-16 Obsolete Quoting Profile Options**

| <b>Profile Option</b>                        | <b>Description</b>  |
|--|---|
| ASO: Advanced Inbound Installation           | Determines if Oracle Advanced Inbound is installed                |
| ASO: Advanced Outbound Installation          | Determines if Oracle Advanced Outbound is installed               |
| ASO: Automatic ATP Check for Number of Items | Automatic ATP check to be performed for number of items           |
| ASO: Default Order Category                  | Determines whether all items in an order are orders or returns    |
| ASO: Default Payment Option                  | Default payment option  |
| ASO: Enable Configure Model Item             | Enables configuration of model items                              |
| ASO: Payment Term                            | Payment term associated with a newly created account              |
| ASO: Product Organization                    | The organization that OC uses to validate product inventory items |
| ASO: Quote Order Type                        | System default order type that quote uses                         |
| ASO: Quote Order Entered State               | The entered state of orders when entered from quotes              |
| ASO: Scripting Installation                  | Determines if Oracle Scripting is used                            |
| ASO: Use Installation Details                | Use Installation Details UI                                       |



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## Oracle Order Capture Foundation Public APIs

This appendix contains information about Oracle Order Capture Foundation's public APIs, which are used by Oracle Quoting. The following sections describe the various PL/SQL APIs that are supported.

- [Oracle Order Capture Foundation Public Packages](#)
- [Package ASO\\_QUOTE\\_PUB](#)
- [Package ASO\\_ORDER\\_INT](#)

## B.1 Oracle Order Capture Foundation Public Packages

There are two packages that encompass the Oracle Order Capture Foundation public APIs, One package pertains to quotes, while the other is specific to orders.

- Package `ASO_QUOTE_PUB`, see Table 2-1, "Quote APIs"
- Package `ASO_ORDER_INT`, see Table 2-2, "Order APIs"

The following tables describe public APIs, which are discussed in this chapter.

**Table 7-1 Quote APIs**

| Name                                   | Description   |
|--|---|
| <code>Create_Quote</code>              | The <code>Create_Quote</code> API creates an entire quote including the quote header, shipment, payment, and line level payments and shipments. |
| <code>Create_Quote (overloaded)</code> | <code>Create_Quote</code> overloaded with Sales Credit and Quote Party input.   |
| <code>Update_Quote</code>              | The <code>Update_Quote</code> API updates a quote in Quoting.   |
| <code>Update_Quote (overloaded)</code> | <code>Update_Quote</code> API overloaded with Sales Credit and Quote Party input.   |
| <code>Copy_Quote</code>                | The <code>Copy_Quote</code> API copies the existing quote to a new quote.   |
| <code>Copy_Quote (overloaded)</code>   | <code>Copy_Quote</code> API overloaded with Sales Credit and Quote Party input.   |
| <code>Submit_Quote</code>              | The <code>Submit_Quote</code> API converts a quote into an order.   |

**Table 7-2 Order APIs**

| Name                      | Description   |
|---------------------------|---|
| <code>Create_Order</code> | The <code>Create_Order</code> API creates a new order in Oracle Order Management.                     |
| <code>Update_Order</code> | The <code>Update_Order</code> API allows for updates to an existing order in Oracle Order Management. |

## B.2 Package ASO\_QUOTE\_PUB

Following is a list of Oracle Order Capture Foundation APIs in the package ASO\_QUOTE\_PUB. These APIs pertain to the quoting aspect of Quoting. They are used to create, update, copy, and submit (to Oracle Order Management) quotes in Quoting.

- Create\_Quote
- Create\_Quote (overloaded)
- Update\_Quote
- Update\_Quote (overloaded)
- Copy\_Quote
- Copy\_Quote (overloaded)
- Submit\_Quote

### B.2.1 Create\_Quote

The Create\_Quote API creates an entire quote including the quote header, shipment, payment, and line level payments and shipments. It also calculates prices for items included in the quote based on necessary tax, and shipping and freight charges. Create\_Quote calls Create\_Quote\_Lines for creating quote lines, line shipments, and line payments.

The following interface APIs are called in Create\_Quote: Pricing, Tax, and Service Contracts (for serviceable items).

#### Parameter Descriptions

The following table lists the IN parameters for the Create\_Quote API.

**Table 7-3 Create\_Quote IN Parameters**

| Parameter            | Data Type                                    |
|----------------------|--|
| P_Api_Version_Number | NUMBER,                                      |
| P_Init_Msg_List      | VARCHAR2 := FND_API.G_FALSE,                 |
| P_Commit             | VARCHAR2 := FND_API.G_FALSE,                 |
| P_Control_Rec        | Control_Rec_Type := G_Miss_Control_Rec,      |
| P_Qte_Header_Rec     | Qte_Header_Rec_Type := G_MISS_Qte_Header_Rec |

**Table 7-3 Create\_Quote IN Parameters**

| <b>Parameter</b>          | <b>Data Type</b>  |
|---------------------------|---|
| P_hd_Price_Attributes_Tbl | ASO_QUOTE_PUB.Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl, |
| P_hd_Payment_Tbl          | ASO_QUOTE_PUB.Payment_Tbl_Type:= G_MISS_PAYMENT_TBL,                    |
| P_hd_Shipment_Rec         | ASO_QUOTE_PUB.Shipment_Rec_Type := G_MISS_SHIPMENT_REC,                 |
| P_hd_Freight_Charge_Tbl   | ASO_QUOTE_PUB.Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl,     |
| P_hd_Tax_Detail_Tbl       | ASO_QUOTE_PUB.Tax_Detail_Tbl_Type:= G_Miss_Tax_Detail_Tbl,              |
| P_Qte_Line_Tbl            | Qte_Line_Tbl_Type := G_MISS_QTE_LINE_TBL,                               |
| P_Qte_Line_Dtl_Tbl        | Qte_Line_Dtl_Tbl_Type := G_MISS_QTE_LINE_DTL_TBL,                       |
| P_Line_Attr_Ext_Tbl       | Line_Attr_Ext_Tbl_Type := G_MISS_Line_Attr_Ext_TBL,                     |
| P_line_rltship_tbl        | Line_Rltship_Tbl_Type := G_MISS_Line_Rltship_Tbl,                       |
| P_Price_Adjustment_Tbl    | Price_Adj_Tbl_Type := G_Miss_Price_Adj_Tbl,                             |
| P_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type := G_Miss_PRICE_ADJ_ATTR_Tbl,                   |
| P_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type := G_Miss_PRICE_ADJ_ATTR_Tbl,                   |
| P_Price_Adj_Rltship_Tbl   | Price_Adj_Rltship_Tbl_Type := G_Miss_Price_Adj_Rltship_Tbl,             |
| P_Ln_Price_Attributes_Tbl | Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl,               |
| P_Ln_Payment_Tbl          | Payment_Tbl_Type := G_MISS_PAYMENT_TBL,                                 |
| P_Ln_Shipment_Tbl         | Shipment_Tbl_Type := G_MISS_SHIPMENT_TBL,                               |
| P_Ln_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl,                   |
| P_Ln_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type := G_Miss_Tax_Detail_Tbl,                           |

The following table lists the OUT parameters for the Create\_Quote API.

**Table 7-4 Create\_Quote OUT Parameters**

| <b>Parameter</b>          | <b>Data Type</b>            |
|---------------------------|-----------------------------|
| x_Qte_Header_Rec          | Qte_Header_Rec_Type,        |
| X_Qte_Line_Tbl            | Qte_Line_Tbl_Type,          |
| X_Qte_Line_Dtl_Tbl        | Qte_Line_Dtl_Tbl_Type,      |
| X_Hd_Price_Attributes_Tbl | Price_Attributes_Tbl_Type,  |
| X_Hd_Payment_Tbl          | Payment_Tbl_Type,           |
| X_Hd_Payment_Rec          | Shipment_Rec_Type,          |
| X_Hd_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type,    |
| X_Hd_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type,        |
| x_Line_Attr_Ext_Tbl       | Line_Attr_Ext_Tbl_Type,     |
| X_Line_Rltship_Tbl        | Line_Rltship_Tbl_Type,      |
| X_Price_Adjustment_Tbl    | Price_Adj_Tbl_Type,         |
| X_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type,    |
| X_Price_Adj_Rltship_Tbl   | Price_Adj_Rltship_Tbl_Type, |
| X_Ln_Price_Attributes_Tbl | Price_Attributes_Tbl_Type,  |
| X_Ln_Payment_Tbl          | Payment_Tbl_Type,           |
| X_Ln_Shipment_Tbl         | Shipment_Tbl_Type,          |
| X_Ln_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type,    |
| X_Ln_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type,        |
| X_Return_Status           | VARCHAR2,                   |
| X_Msg_Count               | NUMBER,                     |
| X_Msg_Data                | VARCHAR2                    |

## B.2.2 Create\_Quote (overloaded)

Create\_Quote overloaded with Sales Credit and Quote Party input.

## Parameter Descriptions

The following table lists the IN parameters for the Create\_Quote API (overloaded) API.

**Table 7-5 Create\_Quote (overloaded) IN Parameters**

| Parameter                 | Data Type   |
|---------------------------|---|
| P_Api_Version_Number      | NUMBER,   |
| P_Init_Msg_List           | VARCHAR2 := FND_API.G_FALSE,  |
| P_Commit                  | VARCHAR2 := FND_API.G_FALSE,  |
| P_Control_Rec             | Control_Rec_Type := G_Miss_Control_Rec,                                 |
| P_Qte_Header_Rec          | Qte_Header_Rec_Type := G_MISS_Qte_Header_Rec                            |
| P_hd_Price_Attributes_Tbl | ASO_QUOTE_PUB.Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl, |
| P_hd_Payment_Tbl          | ASO_QUOTE_PUB.Payment_Tbl_Type:= G_MISS_PAYMENT_TBL,                    |
| P_hd_Shipment_Rec         | ASO_QUOTE_PUB.Shipment_Rec_Type := G_MISS_SHIPMENT_REC,                 |
| P_hd_Freight_Charge_Tbl   | ASO_QUOTE_PUB.Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl,     |
| P_hd_Tax_Detail_Tbl       | ASO_QUOTE_PUB.Tax_Detail_Tbl_Type:=G_Miss_Tax_Detail_Tbl,               |
| P_Qte_Line_Tbl            | Qte_Line_Tbl_Type :=G_MISS_QTE_LINE_TBL,                                |
| P_Qte_Line_Dtl_Tbl        | Qte_Line_Dtl_Tbl_Type :=G_MISS_QTE_LINE_DTL_TBL,                        |
| P_Line_Attr_Ext_Tbl       | Line_Attr_Ext_Tbl_Type :=G_MISS_Line_Attr_Ext_TBL,                      |
| P_line_rltship_tbl        | Line_Rltship_Tbl_Type :=G_MISS_Line_Rltship_Tbl,                        |
| P_Price_Adjustment_Tbl    | Price_Adj_Tbl_Type := G_Miss_Price_Adj_Tbl,                             |
| P_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type := G_Miss_PRICE_ADJ_ATTR_Tbl,                   |
| P_Price_Adj_Rltship_Tbl   | Price_Adj_Rltship_Tbl_Type := G_Miss_Price_Adj_Rltship_Tbl,             |

**Table 7–5 Create\_Quote (overloaded) IN Parameters**

| Parameter                 | Data Type   |
|---------------------------|---|
| P_Ln_Price_Attributes_Tbl | Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl, |
| P_Ln_Payment_Tbl          | Payment_Tbl_Type := G_MISS_PAYMENT_TBL,                   |
| P_Ln_Shipment_Tbl         | Shipment_Tbl_Type := G_MISS_SHIPMENT_TBL,                 |
| P_Ln_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl,     |
| P_Ln_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type := G_Miss_Tax_Detail_Tbl,             |

The following table lists the OUT parameters for the Create\_Quote API (overloaded) API.

**Table 7–6 Create\_Quote (overloaded) OUT Parameters**

| Parameter                 | Data Type                   |
|---------------------------|-----------------------------|
| x_Qte_Header_Rec          | Qte_Header_Rec_Type,        |
| X_Qte_Line_Tbl            | Qte_Line_Tbl_Type,          |
| X_Qte_Line_Dtl_Tbl        | Qte_Line_Dtl_Tbl_Type,      |
| X_Hd_Price_Attributes_Tbl | Price_Attributes_Tbl_Type,  |
| X_Hd_Payment_Tbl          | Payment_Tbl_Type,           |
| X_Hd_Shipment_Rec         | Shipment_Rec_Type,          |
| X_Hd_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type,    |
| X_Hd_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type,        |
| x_Line_Attr_Ext_Tbl       | Line_Attr_Ext_Tbl_Type,     |
| X_Line_Rltship_Tbl        | Line_Rltship_Tbl_Type,      |
| X_Price_Adjustment_Tbl    | Price_Adj_Tbl_Type,         |
| X_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type,    |
| X_Price_Adj_Rltship_Tbl   | Price_Adj_Rltship_Tbl_Type, |
| X_Ln_Price_Attributes_Tbl | Price_Attributes_Tbl_Type,  |
| X_Ln_Payment_Tbl          | Payment_Tbl_Type,           |
| X_Ln_Shipment_Tbl         | Shipment_Tbl_Type,          |

**Table 7-6 Create\_Quote (overloaded) OUT Parameters**

| Parameter               | Data Type                |
|-------------------------|--------------------------|
| X_Ln_Freight_Charge_Tbl | Freight_Charge_Tbl_Type, |
| X_Ln_Tax_Detail_Tbl     | Tax_Detail_Tbl_Type,     |
| X_Ln_Sales_Credit_Tbl   | Sales_Credit_Tbl_Type    |
| X_Ln_Quote_Party_Tbl    | Quote_Party_Tbl_Type     |
| X_Return_Status         | VARCHAR2,                |
| X_Msg_Count             | NUMBER,                  |
| X_Msg_Data              | VARCHAR2                 |

### B.2.3 Update\_Quote

The Update\_Quote API updates a quote in Quoting. Update\_Quote can perform the following operations:

- Create quote lines and line shipment, line payment, and other line attributes
- Update quote lines to update the existing quote lines, and other line attributes.
- Update\_Quote also recalculates item prices after adding or updating lines.

The following APIs are called in Update\_Quote: Pricing, Tax, and Service Contracts (for Serviceable Items).

#### Parameter Descriptions

The following table describes the IN parameters associated with this API.

**Table 7-7 Update\_Quote IN Parameters**

| Parameter                 | Data Type   |
|---------------------------|---|
| P_Api_Version_Number      | NUMBER,   |
| P_Init_Msg_List           | VARCHAR2 := FND_API.G_FALSE,  |
| P_Commit                  | VARCHAR2 := FND_API.G_FALSE,  |
| P_Control_Rec             | Control_Rec_Type := G_Miss_Control_Rec,                                 |
| P_Qte_Header_Rec          | Qte_Header_Rec_Type := G_MISS_Qte_Header_Rec                            |
| P_hd_Price_Attributes_Tbl | ASO_QUOTE_PUB.Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl, |

**Table 7-7 Update\_Quote IN Parameters**

| <b>Parameter</b>          | <b>Data Type</b>  |
|---------------------------|---|
| P_hd_Payment_Tbl          | ASO_QUOTE_PUB.Payment_Tbl_Type := G_MISS_PAYMENT_TBL,               |
| P_hd_Shipment_Rec         | ASO_QUOTE_PUB.Shipment_Rec_Type := G_MISS_SHIPMENT_REC,             |
| P_hd_Freight_Charge_Tbl   | ASO_QUOTE_PUB.Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl, |
| P_hd_Tax_Detail_Tbl       | ASO_QUOTE_PUB.Tax_Detail_Tbl_Type := G_Miss_Tax_Detail_Tbl,         |
| P_Qte_Line_Tbl            | Qte_Line_Tbl_Type := G_MISS_QTE_LINE_TBL,                           |
| P_Qte_Line_Dtl_Tbl        | Qte_Line_Dtl_Tbl_Type := G_MISS_QTE_LINE_DTL_TBL,                   |
| P_Line_Attr_Ext_Tbl       | Line_Attr_Ext_Tbl_Type := G_MISS_Line_Attr_Ext_TBL,                 |
| P_line_rltship_tbl        | Line_Rltship_Tbl_Type := G_MISS_Line_Rltship_Tbl,                   |
| P_Price_Adjustment_Tb     | Price_Adj_Tbl_Type := G_Miss_Price_Adj_Tbl,                         |
| P_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type := G_Miss_PRICE_ADJ_ATTR_Tbl,               |
| P_Price_Adj_Rltship_Tbl   | Price_Adj_Rltship_Tbl_Type := G_Miss_Price_Adj_Rltship_Tbl,         |
| P_Ln_Price_Attributes_Tbl | Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl,           |
| P_Ln_Payment_Tbl          | Payment_Tbl_Type := G_MISS_PAYMENT_TBL,                             |
| P_Ln_Shipment_Tbl         | Shipment_Tbl_Type := G_MISS_SHIPMENT_TBL,                           |
| P_Ln_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl,               |
| P_Ln_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type := G_Miss_Tax_Detail_Tbl,                       |

The following table describes the OUT parameters associated with this API.

**Table 7-8 Update\_Quote OUT Parameters**

| <b>Parameter</b>          | <b>Data Type</b>            |
|---------------------------|-----------------------------|
| x_Qte_Header_Rec          | Qte_Header_Rec_Type,        |
| X_Qte_Line_Tbl            | Qte_Line_Tbl_Type,          |
| X_Qte_Line_Dtl_Tbl        | Qte_Line_Dtl_Tbl_Type,      |
| X_Hd_Price_Attributes_Tbl | Price_Attributes_Tbl_Type,  |
| X_Hd_Payment_Tbl          | Payment_Tbl_Type,           |
| X_Hd_Shipment_Rec         | Shipment_Rec_Type,          |
| X_Hd_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type,    |
| X_Hd_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type,        |
| x_Line_Attr_Ext_Tbl       | Line_Attr_Ext_Tbl_Type,     |
| X_line_rltship_tbl        | Line_Rltship_Tbl_Type,      |
| X_Price_Adjustment_Tbl    | Price_Adj_Tbl_Type,         |
| X_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type,    |
| X_Price_Adj_Rltship_Tbl   | Price_Adj_Rltship_Tbl_Type, |
| X_Ln_Price_Attributes_Tbl | Price_Attributes_Tbl_Type,  |
| X_Ln_Payment_Tbl          | Payment_Tbl_Type,           |
| X_Ln_Shipment_Tbl         | Shipment_Tbl_Type,          |
| X_Ln_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type,    |
| X_Ln_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type,        |
| X_Return_Status           | VARCHAR2,                   |
| X_Msg_Count               | NUMBER,                     |
| X_Msg_Data                | VARCHAR2                    |

## B.2.4 Update\_Quote (overloaded)

Update\_Quote API overloaded with Sales Credit and Quote Party input.

### Parameter Descriptions

The following table describes the IN parameters associated with this API.

**Table 7–9 Update\_Quote (overloaded) IN Parameters**

| <b>Parameter</b>          | <b>Data Type</b>  |
|---------------------------|---|
| P_Api_Version_Number      | NUMBER,   |
| P_Init_Msg_List           | VARCHAR2 := FND_API.G_FALSE,  |
| P_Commit                  | VARCHAR2 := FND_API.G_FALSE,  |
| P_Control_Rec             | Control_Rec_Type := G_Miss_Control_Rec,                                 |
| P_Qte_Header_Rec          | Qte_Header_Rec_Type := G_MISS_Qte_Header_Rec                            |
| P_hd_Price_Attributes_Tbl | ASO_QUOTE_PUB.Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl, |
| P_hd_Payment_Tbl          | ASO_QUOTE_PUB.Payment_Tbl_Type := G_MISS_PAYMENT_TBL,                   |
| P_hd_Shipment_Rec         | ASO_QUOTE_PUB.Shipment_Rec_Type := G_MISS_SHIPMENT_REC,                 |
| P_hd_Freight_Charge_Tbl   | ASO_QUOTE_PUB.Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl,     |
| P_hd_Tax_Detail_Tbl       | ASO_QUOTE_PUB.Tax_Detail_Tbl_Type := G_Miss_Tax_Detail_Tbl,             |
| P_Qte_Line_Tbl            | Qte_Line_Tbl_Type := G_MISS_QTE_LINE_TBL,                               |
| P_Qte_Line_Dtl_Tbl        | Qte_Line_Dtl_Tbl_Type := G_MISS_QTE_LINE_DTL_TBL,                       |
| P_Line_Attr_Ext_Tbl       | Line_Attr_Ext_Tbl_Type := G_MISS_Line_Attr_Ext_TBL,                     |
| P_line_rltship_tbl        | Line_Rltship_Tbl_Type := G_MISS_Line_Rltship_Tbl,                       |
| P_Price_Adjustment_Tb     | Price_Adj_Tbl_Type := G_Miss_Price_Adj_Tbl,                             |
| P_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type := G_Miss_PRICE_ADJ_ATTR_Tbl,                   |
| P_Price_Adj_Rltship_Tbl   | Price_Adj_Rltship_Tbl_Type := G_Miss_Price_Adj_Rltship_Tbl,             |
| P_Ln_Price_Attributes_Tbl | Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl,               |
| P_Ln_Payment_Tbl          | Payment_Tbl_Type := G_MISS_PAYMENT_TBL,                                 |
| P_Ln_Shipment_Tbl         | Shipment_Tbl_Type := G_MISS_SHIPMENT_TBL,                               |

**Table 7–9 Update\_Quote (overloaded) IN Parameters**

| Parameter               | Data Type   |
|-------------------------|---|
| P_Ln_Freight_Charge_Tbl | Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl, |
| P_Ln_Tax_Detail_Tbl     | Tax_Detail_Tbl_Type := G_Miss_Tax_Detail_Tbl,         |

The following table describes the OUT parameters associated with this API.

**Table 7–10 Update\_Quote (overloaded) OUT Parameters**

| Parameter                 | Data Type   |
|---------------------------|---|
| P_Api_Version_Number      | NUMBER,   |
| P_Init_Msg_List           | VARCHAR2 := FND_API.G_FALSE,  |
| P_Commit                  | VARCHAR2 := FND_API.G_FALSE,  |
| P_Control_Rec             | Control_Rec_Type := G_Miss_Control_Rec,                                 |
| P_Qte_Header_Rec          | Qte_Header_Rec_Type := G_MISS_Qte_Header_Rec                            |
| P_hd_Price_Attributes_Tbl | ASO_QUOTE_PUB.Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl, |
| P_hd_Payment_Tbl          | ASO_QUOTE_PUB.Payment_Tbl_Type := G_MISS_PAYMENT_TBL,                   |
| P_hd_Shipment_Rec         | ASO_QUOTE_PUB.Shipment_Rec_Type := G_MISS_SHIPMENT_REC,                 |
| P_hd_Freight_Charge_Tbl   | ASO_QUOTE_PUB.Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl,     |
| P_hd_Tax_Detail_Tbl       | ASO_QUOTE_PUB.Tax_Detail_Tbl_Type := G_Miss_Tax_Detail_Tbl,             |
| P_Qte_Line_Tbl            | Qte_Line_Tbl_Type := G_MISS_QTE_LINE_TBL,                               |
| P_Qte_Line_Dtl_Tbl        | Qte_Line_Dtl_Tbl_Type := G_MISS_QTE_LINE_DTL_TBL,                       |
| P_Line_Attr_Ext_Tbl       | Line_Attr_Ext_Tbl_Type := G_MISS_Line_Attr_Ext_TBL,                     |
| P_line_rltship_tbl        | Line_Rltship_Tbl_Type := G_MISS_Line_Rltship_Tbl,                       |
| P_Price_Adjustment_Tb     | Price_Adj_Tbl_Type := G_Miss_Price_Adj_Tbl,                             |

**Table 7–10 Update\_Quote (overloaded) OUT Parameters**

| <b>Parameter</b>          | <b>Data Type</b>  |
|---------------------------|---|
| P_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type := G_Miss_PRICE_ADJ_ATTR_Tbl,       |
| P_Price_Adj_Rltship_Tbl   | Price_Adj_Rltship_Tbl_Type := G_Miss_Price_Adj_Rltship_Tbl, |
| P_Ln_Price_Attributes_Tbl | Price_Attributes_Tbl_Type := G_Miss_Price_Attributes_Tbl,   |
| P_Ln_Payment_Tbl          | Payment_Tbl_Type := G_MISS_PAYMENT_TBL,                     |
| P_Ln_Shipment_Tbl         | Shipment_Tbl_Type := G_MISS_SHIPMENT_TBL,                   |
| P_Ln_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type := G_Miss_Freight_Charge_Tbl,       |
| P_Ln_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type := G_Miss_Tax_Detail_Tbl,               |
| x_Qte_Header_Rec          | Qte_Header_Rec_Type,  |
| X_Qte_Line_Tbl            | Qte_Line_Tbl_Type,  |
| X_Qte_Line_Dtl_Tbl        | Qte_Line_Dtl_Tbl_Type,                                      |
| X_Hd_Price_Attributes_Tbl | Price_Attributes_Tbl_Type,                                  |
| X_Hd_Payment_Tbl          | Payment_Tbl_Type,   |
| X_Hd_Shipment_Rec         | Shipment_Rec_Type,  |
| X_Hd_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type,                                    |
| X_Hd_Tax_Detail_Tbl       | Tax_Detail_Tbl_Type,  |
| x_Line_Attr_Ext_Tbl       | Line_Attr_Ext_Tbl_Type,                                     |
| X_line_rltship_tbl        | Line_Rltship_Tbl_Type,                                      |
| X_Price_Adjustment_Tbl    | Price_Adj_Tbl_Type,   |
| X_Price_Adj_Attr_Tbl      | Price_Adj_Attr_Tbl_Type,                                    |
| X_Price_Adj_Rltship_Tbl   | Price_Adj_Rltship_Tbl_Type,                                 |
| X_Ln_Price_Attributes_Tbl | Price_Attributes_Tbl_Type,                                  |
| X_Ln_Payment_Tbl          | Payment_Tbl_Type,   |
| X_Ln_Shipment_Tbl         | Shipment_Tbl_Type,  |
| X_Ln_Freight_Charge_Tbl   | Freight_Charge_Tbl_Type,                                    |

**Table 7–10 Update\_Quote (overloaded) OUT Parameters**

| Parameter             | Data Type              |
|-----------------------|------------------------|
| X_Ln_Tax_Detail_Tbl   | Tax_Detail_Tbl_Type,   |
| X_Ln_Sales_Credit_Tbl | Sales_Credit_Tbl_Type, |
| X_Ln_Quote_Party_Tbl  | Quote_Party_Tbl_Type,  |
| X_Return_Status       | VARCHAR2,              |
| X_Msg_Count           | NUMBER,                |
| X_Msg_Data            | VARCHAR2               |

## B.2.5 Copy\_Quote

The Copy\_Quote API copies the existing quote to a new quote. If p\_copy\_only\_header is set to FALSE, it copies the header and lines into a new quote. If p\_new\_version is set to TRUE, a new version of the current quote will be created.

### Parameter Descriptions

The following table describes the IN parameters associated with this API.

**Table 7–11 Copy\_Quote IN Parameters**

| Parameter            | Data Type |
|----------------------|-----------|
| P_Api_Version_Number | NUMBER    |
| P_Init_Msg_List      | VARCHAR2  |
| P_Commit             | VARCHAR2  |
| P_Validation_Level   | NUMBER    |
| P_Qte_Header_Id      | NUMBER    |
| P_Last_Update_Date   | DATE      |
| P_Copy_Only_Header   | VARCHAR2  |
| P_New_Version        | VARCHAR2  |
| P_Qte_Status_Id      | NUMBER    |
| P_Qte_Number         | NUMBER    |

The following table describes the OUT parameters associated with this API.

**Table 7–12 Copy\_Quote OUT Parameters**

| Parameter       | Data Type |
|-----------------|-----------|
| X_Qte_Header_Id | NUMBER    |
| X_Return_Status | VARCHAR2  |
| X_Msg_Count     | NUMBER    |
| X_Msg_Data      | VARCHAR2  |

## B.2.6 Copy\_Quote (overloaded)

Copy\_Quote API overloaded with Sales Credit and Quote Party input.

Accepts a new input parameter p\_control\_rec.

If p\_control\_rec.COPY\_TASK\_FLAG is set to 'Y', then Copy\_Quote will copy the task associated with quote header.

If p\_control\_rec.COPY\_NOTES\_FLAG is set to 'Y', then Copy\_Quote will copy the notes associated with quote header.

If p\_control\_rec.COPY\_ATT\_FLAG is set to 'Y', then Copy\_Quote will copy the attachments associated with quote header.

Copy\_Quote expects the user to pass the p\_control\_rec if they want to copy notes, tasks or attachments associated with quote header.

### Parameter Descriptions

The following table describes the IN parameters associated with this API.

**Table 7–13 Copy\_Quote (overloaded) IN Parameters**

| Parameter            | Data Type |
|----------------------|-----------|
| P_Api_Version_Number | NUMBER    |
| P_Init_Msg_List      | VARCHAR2  |
| P_Commit             | VARCHAR2  |
| P_Validation_Level   | NUMBER    |
| P_Qte_Header_Id      | NUMBER    |
| P_Last_Update_Date   | DATE      |
| P_Copy_Only_Header   | VARCHAR2  |

**Table 7–13 Copy\_Quote (overloaded) IN Parameters**

| Parameter       | Data Type                      |
|-----------------|--------------------------------|
| P_New_Version   | VARCHAR2                       |
| P_Qte_Status_Id | NUMBER                         |
| P_Qte_Number    | NUMBER                         |
| P_control_rec   | ASO_QUOTE_PUB.Control_rec_type |

The following table describes the OUT parameters associated with this API.

**Table 7–14 Copy\_Quote (overloaded) OUT Parameters**

| Parameter       | Data Type |
|-----------------|-----------|
| X_Qte_Header_Id | NUMBER    |
| X_Return_Status | VARCHAR2  |
| X_Msg_Count     | NUMBER    |
| X_Msg_Data      | VARCHAR2  |

## B.2.7 Submit\_Quote

The Submit\_Quote API converts a quote into an order.

Before booking an order, Submit\_Quote performs credit card authorization (If the profile option ASO: Credit Card Authorization is set) and Renewal of a Contract.

Submit\_Quote calls the Create Order API to book an order in Oracle Order Management.

## B.3 Package ASO\_ORDER\_INT

The following is a list of Oracle Order Capture Foundation APIs in the package ASO\_ORDER\_INT. These APIs are provided for application developers to create and update orders in Oracle Order Management. They internally call Oracle Order Management APIs and map data to the OM schema.

- Create\_Order
- Update\_Order

### B.3.1 Create\_Order

The Create\_Order API creates a new order in Oracle Order Management. This API passes the necessary data to and from Oracle Order Management to create an Order. Create\_Order API maps the Quote header and line level information to the Order header and lines.

If the user is using the Quoting schema, then Submit\_Quote API is preferred over Create\_Order API.

#### Parameter Descriptions

The following table describes the IN parameters associated with this API.

**Table 7–15 Create\_Order IN Parameters**

| Parameter                      | Data Type                                |
|--------------------------------|--|
| P_Api_Version_Number           | NUMBER,                                  |
| P_Init_Msg_List                | VARCHAR2 := FND_API.G_FALSE              |
| P_Commit                       | VARCHAR2 := FND_API.G_FALSE              |
| P_Qte_Rec                      | ASO_QUOTE_PUB.Qte_Header_Rec_Type        |
| P_Header_Payment_Tbl           | ASO_QUOTE_PUB.Payment_Tbl_Type           |
| P_Header_Price_Adj_Tbl         | ASO_QUOTE_PUB.Price_Adj_Tbl_Type         |
| P_Header_Price_Attributes_Tbl  | ASO_QUOTE_PUB.Price_Attributes_Tbl_Type  |
| P_Header_Price_Adj_rltship_Tbl | ASO_QUOTE_PUB.Price_Adj_Rltship_Tbl_Type |
| P_Header_Price_Adj_Attr_Tbl    | ASO_QUOTE_PUB.Price_Adj_Attr_Tbl_Type    |
| P_Header_Shipment_Tbl          | ASO_QUOTE_PUB.Shipment_Tbl_Type          |
| P_Header_TAX_DETAIL_Tbl        | ASO_QUOTE_PUB.TAX_DETAIL_Tbl_Type        |
| P_Header_FREIGHT_CHARGE_Tbl    | ASO_QUOTE_PUB.FREIGHT_CHARGE_Tbl_Type    |
| P_header_sales_credit_TBL      | ASO_ORDER_PUB.Sales_credit_tbl_type      |
| P_Qte_Line_Tbl                 | ASO_QUOTE_PUB.Qte_Line_Tbl_Type          |
| P_Qte_Line_Dtl_tbl             | ASO_QUOTE_PUB.Qte_Line_Dtl_tbl_Type      |
| P_Line_Payment_Tbl             | ASO_QUOTE_PUB.Payment_Tbl_Type           |
| P_Line_Price_Adj_Tbl           | ASO_QUOTE_PUB.Price_Adj_Tbl_Type         |
| P_Line_Price_Attributes_Tbl    | ASO_QUOTE_PUB.Price_Attributes_Tbl_Type  |

**Table 7–15 Create\_Order IN Parameters**

| Parameter                    | Data Type                                |
|------------------------------|--|
| P_Line_Price_Adj_rltship_Tbl | ASO_QUOTE_PUB.Price_Adj_Rltship_Tbl_Type |
| P_Line_Price_Adj_Attr_Tbl    | ASO_QUOTE_PUB.Price_Adj_Attr_Tbl_Type    |
| P_Line_Shipment_Tbl          | ASO_QUOTE_PUB.Shipment_Tbl_Type          |
| P_Line_TAX_DETAIL_Tbl        | ASO_QUOTE_PUB.TAX_DETAIL_Tbl_Type        |
| P_Line_FREIGHT_CHARGE_Tbl    | ASO_QUOTE_PUB.FREIGHT_CHARGE_Tbl_Type    |
| P_Line_ATTRIBS_EXT_Tbl       | ASO_QUOTE_PUB.Line_Attribs_Ext_Tbl_Type  |
| P_Line_Rltship_Tbl           | ASO_QUOTE_PUB.Line_Rltship_Tbl_Type      |
| P_Line_sales_credit_TBL      | ASO_ORDER_PUB.Sales_credit_tbl_type      |
| P_Lot_Serial_Tbl             | ASO_ORDER_PUB.Lot_Serial_Tbl_Type        |
| P_Control_Rec                | ASO_ORDER_INT.Control_Rec_Type           |

The following table describes the OUT parameters associated with this API.

**Table 7–16 Create\_Order OUT Parameters**

| Parameter          | Data Type                            |
|--------------------|--------------------------------------|
| X_Order_Header_Rec | ASO_ORDER_INT.Order_Header_Rec_Type, |
| X_Order_Line_Tbl   | ASO_ORDER_INT.Order_Line_Tbl_type,   |
| X_Return_Status    | VARCHAR2,                            |
| X_Msg_Count        | NUMBER,                              |
| X_Msg_Data         | VARCHAR2                             |

### B.3.2 Update\_Order

The Update\_Order API allows for updates to an existing order in Oracle Order Management. This API passes information to and from Oracle Order Management. It does not validate information. Validation is performed in Oracle Order Management's Process Order API, which is called by Create\_Order. For more information on the Process Order API, refer to the *Oracle Order Management Suite APIs and Open Interfaces Manual, Release 11i*.

Update\_Order does not modify quote and relates directly to an order. Any IDs passed should relate to the IDs in OM and not quote related IDs.

### Parameter Descriptions

The following table describes the IN parameters associated with this API.

**Table 7–17 Update\_Order IN Parameters**

| Parameter                      | Data Type                                |
|--------------------------------|--|
| P_Api_Version_Number           | NUMBER,                                  |
| P_Init_Msg_List                | VARCHAR2 := FND_API.G_FALSE              |
| P_Commit                       | VARCHAR2 := FND_API.G_FALSE              |
| P_Qte_Rec                      | ASO_QUOTE_PUB.Qte_Header_Rec_Type        |
| P_Header_Payment_Tbl           | ASO_QUOTE_PUB.Payment_Tbl_Type           |
| P_Header_Price_Adj_Tbl         | ASO_QUOTE_PUB.Price_Adj_Tbl_Type         |
| P_Header_Price_Attributes_Tbl  | ASO_QUOTE_PUB.Price_Attributes_Tbl_Type  |
| P_Header_Price_Adj_rltship_Tbl | ASO_QUOTE_PUB.Price_Adj_Rltship_Tbl_Type |
| P_Header_Price_Adj_Attr_Tbl    | ASO_QUOTE_PUB.Price_Adj_Attr_Tbl_Type    |
| P_Header_Shipment_Tbl          | ASO_QUOTE_PUB.Shipment_Tbl_Type          |
| P_Header_TAX_DETAIL_Tbl        | ASO_QUOTE_PUB.TAX_DETAIL_Tbl_Type        |
| P_Header_FREIGHT_CHARGE_Tbl    | ASO_QUOTE_PUB.FREIGHT_CHARGE_Tbl_Type    |
| P_header_sales_credit_Tbl      | ASO_ORDER_PUB.Sales_credit_tbl_type      |
| P_Qte_Line_Tbl                 | ASO_QUOTE_PUB.Qte_Line_Tbl_Type          |
| P_Qte_Line_Dtl_tbl             | ASO_QUOTE_PUB.Qte_Line_Dtl_tbl_Type      |
| P_Line_Payment_Tbl             | ASO_QUOTE_PUB.Payment_Tbl_Type           |
| P_Line_Price_Adj_Tbl           | ASO_QUOTE_PUB.Price_Adj_Tbl_Type         |
| P_Line_Price_Attributes_Tbl    | ASO_QUOTE_PUB.Price_Attributes_Tbl_Type  |
| P_Line_Price_Adj_rltship_Tbl   | ASO_QUOTE_PUB.Price_Adj_Rltship_Tbl_Type |

**Table 7-17 Update\_Order IN Parameters**

| <b>Parameter</b>          | <b>Data Type</b>                        |
|---------------------------|---|
| P_Line_Price_Adj_Attr_Tbl | ASO_QUOTE_PUB.Price_Adj_Attr_Tbl_Type   |
| P_Line_Shipment_Tbl       | ASO_QUOTE_PUB.Shipment_Tbl_Type         |
| P_Line_TAX_DETAIL_Tbl     | ASO_QUOTE_PUB.TAX_DETAIL_Tbl_Type       |
| P_Line_FREIGHT_CHARGE_Tbl | ASO_QUOTE_PUB.FREIGHT_CHARGE_Tbl_Type   |
| P_Line_ATTRIBS_EXT_Tbl    | ASO_QUOTE_PUB.Line_Attribs_Ext_Tbl_Type |
| P_Line_Rltship_Tbl        | ASO_QUOTE_PUB.Line_Rltship_Tbl_Type     |
| P_Line_sales_credit_TBL   | ASO_ORDER_PUB.Sales_credit_tbl_type     |
| P_Lot_Serial_Tbl          | ASO_ORDER_PUB.Lot_Serial_Tbl_Type       |
| P_Control_Rec             | ASO_ORDER_INT.Control_Rec_Type          |
| X_Order_Header_Rec        | ASO_ORDER_INT.Order_Header_Rec_Type,    |

The following table describes the OUT parameters associated with this API.

**Table 7-18 Update\_Order OUT Parameters**

| <b>Parameter</b>   | <b>Data Type</b>                     |
|--------------------|--------------------------------------|
| X_Order_Header_Rec | ASO_ORDER_INT.Order_Header_Rec_Type, |
| X_Order_Line_Tbl   | ASO_ORDER_INT.Order_Line_Tbl_type,   |
| X_Return_Status    | VARCHAR2,                            |
| X_Msg_Count        | NUMBER,                              |
| X_Msg_Data         | VARCHAR2                             |

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## Pricing and Qualifier Attributes

This chapter contains information on the pricing and qualifier attributes supported by Oracle Quoting.

- [Overview of Attributes](#)
- [Attributes Supported by Quoting](#)

## C.1 Overview of Attributes

Attributes are used to create criteria for the Pricing Qualifiers you set up in Oracle Pricing. For example, you can use the Customer Name attribute to create Pricing Qualifiers that limits available Promotions based upon the Customer Name.

For more information on attributes in Oracle Pricing, refer to the *Oracle Pricing User's Guide*.

## C.2 Attributes Supported by Quoting

The following table lists the Attributes in Oracle Pricing that Quoting supports:

**Table C-1 Attributes Supported by Quoting**

| Context  | Attribute Name                          | Pricing Level | Pricing or Qualifier Attribute |
|----------|---|---------------|--------------------------------|
| Customer | Account Type                            | Line/Header   | Qualifier                      |
| Customer | Agreement Name                          | Line/Header   | Qualifier                      |
| Customer | Agreement Type                          | Line/Header   | Qualifier                      |
| Customer | Bill To                                 | Line/Header   | Qualifier                      |
| Customer | Customer Class                          | Line/Header   | Qualifier                      |
| Customer | Customer Name                           | Line/Header   | Qualifier                      |
| Customer | GSA Indicator                           | Line/Header   | Qualifier                      |
| Customer | Invoice To Party Site                   | Line/Header   | Qualifier                      |
| Customer | Party Id                                | Line/Header   | Qualifier                      |
| Customer | Sales Channel                           | Line/Header   | Qualifier                      |
| Customer | Ship To                                 | Line/Header   | Qualifier                      |
| Customer | Ship To Party Site                      | Line/Header   | Qualifier                      |
| Customer | Site Use Id                             | Line/Header   | Qualifier                      |
| Item     | ALL_ITEMS                               | Line          | Pricing                        |
| Item     | Inventory Item Id                       | Line          | Pricing                        |
| Item     | Item Category                           | Line          | Pricing                        |
| Item     | Segment 1 (Key item flexfield segments) | Line          | Pricing                        |

**Table C-1 Attributes Supported by Quoting**

| <b>Context</b> | <b>Attribute Name</b> | <b>Pricing Level</b> | <b>Pricing or Qualifier Attribute</b> |
|----------------|-----------------------|----------------------|---------------------------------------|
| Item           | Segment 2             | Line                 | Pricing                               |
| Item           | Segment 3             | Line                 | Pricing                               |
| Item           | Segment 4             | Line                 | Pricing                               |
| Item           | Segment 5             | Line                 | Pricing                               |
| Item           | Segment 6             | Line                 | Pricing                               |
| Item           | Segment 7             | Line                 | Pricing                               |
| Item           | Segment 8             | Line                 | Pricing                               |
| Item           | Segment 9             | Line                 | Pricing                               |
| Item           | Segment 10            | Line                 | Pricing                               |
| Item           | Segment 11            | Line                 | Pricing                               |
| Item           | Segment 12            | Line                 | Pricing                               |
| Item           | Segment 13            | Line                 | Pricing                               |
| Item           | Segment 14            | Line                 | Pricing                               |
| Item           | Segment 15            | Line                 | Pricing                               |
| Item           | Segment 16            | Line                 | Pricing                               |
| Item           | Segment 17            | Line                 | Pricing                               |
| Item           | Segment 18            | Line                 | Pricing                               |
| Item           | Segment 19            | Line                 | Pricing                               |
| Item           | Segment 20            | Line                 | Pricing                               |
| Line Volume    | Item Amount           | Line                 | Pricing                               |
| Line Volume    | Item Quantity         | Line                 | Pricing                               |
| Line Volume    | Period1 Item Quantity | Line                 | Pricing                               |
| Line Volume    | Period2 Item Quantity | Line                 | Pricing                               |
| Line Volume    | Period3 Item Quantity | Line                 | Pricing                               |
| Modlist        | Price List            | Line/Header          | Qualifier                             |

**Table C-1 Attributes Supported by Quoting**

| <b>Context</b>     | <b>Attribute Name</b> | <b>Pricing Level</b> | <b>Pricing or Qualifier Attribute</b> |
|--------------------|-----------------------|----------------------|---------------------------------------|
| Modlist            | Promotion Number      | Line/Header          | Qualifier                             |
| Order              | Customer PO           | Line                 | Qualifier                             |
| Order              | Line Category         | Line                 | Qualifier                             |
| Order              | Line Type             | Line                 | Qualifier                             |
| Order              | Order Category        | Line                 | Qualifier                             |
| Order              | Order Type            | Line/Header          | Qualifier                             |
| Order              | Pricing Date          | Line                 | Qualifier                             |
| Order              | Request Date          | Line                 | Qualifier                             |
| Order              | Shippable Flag        | Line                 | Qualifier                             |
| Pricing Attributes | Model Id              | Line                 | Pricing                               |
| Pricing Attributes | Parent List Price     | Line                 | Pricing                               |
| Segment            | Market Segment        | Line/Header          | Qualifier                             |
| Segment            | Target Segment        | Line/Header          | Qualifier                             |
| Terms              | Payment Terms         | Line/Header          | Qualifier                             |
| Terms              | Shipping Terms        | Line/Header          | Qualifier                             |
| Territory          | Territory             | Line/Header          | Qualifier                             |
| Volume             | Line Volume           | Line                 | Qualifier                             |
| Volume             | Line Weight           | Line                 | Qualifier                             |
| Volume             | Order amount          | Line                 | Qualifier                             |
| Volume             | Order Amount          | Header               | Qualifier                             |
| Volume             | Order Qty             | Line                 | Qualifier                             |

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# Glossary

## **accepted**

A quote status indicating that the quote terms have been accepted by the customer.

## **API**

An application programming interface (API) is a published interface to accomplish a business or scientific function.

## **application tier**

One of the three tiers that make up Internet Computing Architecture. The application tier manages Oracle Applications and other tools. Also known as the middle tier. See [Internet Computing Architecture](#).

## **attributes**

Attributes are used to create criteria for the Pricing Qualifiers you set up in Oracle Pricing.

## **ATP (Availability to Promise)**

The quantity of current on-hand stock, outstanding receipts and planned production which has not been committed through a reservation or placing demand. In Oracle Inventory, you define the types of supply and demand that should be included in your ATP calculation.

## **availability**

The percentage or amount of scheduled time that a computing system provides application service. See [ATP \(Availability to Promise\)](#).

**bid**

A quote status indicating that the quote has been presented to the customer.

**bill-to customer**

The name and financial account of the customer who will be invoiced for the goods or service ordered.

**configurable item**

A base model item that a user can configure by adding components.

**database tier**

One of the three tiers that make up Internet Computing Architecture. The database tier manages the Oracle8i database. See [Internet Computing Architecture](#).

**debugger**

Debug messages notify you every time a trigger starts to fire, and Debug Mode allows you to dynamically view the execution of your triggers and variables.

**descriptive flexfield**

A field that your organization can extend to capture extra information not otherwise tracked by Oracle applications. A descriptive flexfield appears in your window as a single character, unnamed field. Your organization can customize this field to capture additional information unique to your business.

**desktop tier**

One of the three tiers that make up Internet Computing Architecture. The desktop tier provides the user interface display. See [Internet Computing Architecture](#).

**drafted**

A quote status indicating that the quote is in the initial phase.

**entered**

A quote status indicating that the quote has been successfully submitted as an order in Order Management. Orders with this status can be modified in Order Management.

**GSA (General Services Administration)**

A customer classification that indicates the customer is a U.S. government customer. For products on the GSA price list, a fixed price must be used, defined on the GSA

contract. The items contained on the GSA price list cannot be sold to commercial customers for the same or less price than the government price. The price offered to the government must be the minimum in the market.

**inactive**

A quote status indicating that no further activity is allowed on the quote.

**Internet Computing Architecture**

A framework for three tiered, distributed computing that supports Oracle Applications products. The three tiers are the desktop tier, application tier or middle tier, and database tier.

**lookup types**

A predefined list of values. Each value in a lookup type has an internal and a display name.

**lost**

A quote status indicating that the customer did not accept the quote.

**LOV**

A list of valid values in a text field, from which the user must choose.

**manual discounts**

The ability to manually override the list price of an item.

**middle tier**

See [application tier](#).

**modifier**

Defines how Oracle Pricing makes adjustments. For example, a modifier can take the form of discounts or surcharges. In Oracle Pricing, when you set up modifiers, you define the adjustments your customers may receive. You control the application of modifiers by the pricing engine by also setting up rules that specify qualifiers and attributes governing their use.

**ordered**

A quote status indicating that the quote has been successfully submitted as an order in Order Management. Orders with this status cannot be modified in Order Management.

**order problem**

A quote status indicating that there was a problem when attempting to place the order.

**order reviewed**

A quote status indicating that the order has been reviewed by the customer.

**qualifier**

Qualifiers, which are defined in Pricing, control who receives price adjustments.

**QuickCodes**

See [lookup types](#).

**quote status**

The quote status indicates the stage of preparation that a quote is in. Possible quote statuses include drafted, bid, accepted, entered, ordered, order problem, order reviewed, lost, and inactive.

**quote versioning**

The quote version, which is part of the quote number, indicates the latest version of the quote. If you set up quote versioning for quote statuses, the version increments each time you change the status and save the quote.

**role**

One or more users grouped by a common responsibility or position.

**role types**

A collection of roles associated with a particular CRM module.

**sourcing rule**

Sourcing rules are used by Oracle Pricing for binding attribute values for attributes that have been defined in a qualifier or pricing context.

**trade-in**

A trade-in is performed when a customer wants to return an item for credit against an order.

**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 Quoting, % is the wildcard character. For example, if you enter "order%" as a quote name search parameter, the application returns all quotes with names that begin with "order."



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