Oracle® Quoting - Forms

Concepts and Procedures

Release 11*i*

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Preface

Audience for This Guide

Welcome to Release 11*i* of the *Oracle Quoting - Forms Concepts and Procedures*, formerly the *Oracle Order Capture Concepts and Procedures*.

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

- The principles and customary practices of your business area.
- Oracle Quoting - Forms

  If you have never used 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 *Oracle Quoting*.

- Chapter 1 provides overviews of the application and its components, and explanations of key concepts, features, functions, and the application's relationships to other Oracle or third-party applications.
- Chapter 2 provides process-oriented, task-based procedures for using the application to perform essential business tasks.

- Appendix A provides a reference to the Quoting User Interface (UI).

Typographic Conventions

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

Convention	Meaning
italic text	Book titles
`Courier text`	User commands and file content examples
UPPERCASE	Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables
boldface text	Menu, button, keyboard, and form options Emphasized words or phrases
< >	Angle brackets enclose user-supplied names. 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/`.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

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 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

Oracle 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 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 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 Implementation Guide

This document provides information and instructions to help you successfully implement Quoting.

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 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 6*i* 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 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 Oracle8*i* server, and your hardware and software environment.

Oracl*eMetaLink*

Oracl*eMetaLink* 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 Oracl*eMetaLin*k, 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 Oracl*eMetaLink* 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.

1

Understanding Oracle Quoting

1.1 Overview of Understanding Oracle Quoting

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

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

- Relationship of Oracle Quoting to Other Oracle Applications
- Understanding the Quoting Form
- Customer Types
- Customer Data: Sold-To, Bill-To, Ship-To
- Understanding Quotes
- Understanding Quote Status
- Understanding Orders
- Related Items: Cross-Sell, Up-Sell, and Substitute
- How Items are Priced and Discounted
- Understanding Tax Exemption
- Understanding the List of Values (LOV) Fields
- Understanding the Item and Price List LOVs

- Understanding Quoting Security

1.2 Relationship of Oracle Quoting to Other Oracle Applications

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

All of the CRM applications use the Trading Community Architecture (TCA). The TCA model stores customer information such as name, address, contacts, past billing information, past shipping information, and past payment information. The TCA model allows applications to access consistent information on all business entities. The data is available across all channels—phone, web, or in person—and as a result, the customer information available to representatives across applications is accurate and consistent.

There are three main Oracle applications that Quoting integrates with:

- Oracle TeleSales
- Oracle Customer Care
- Oracle iStore

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

1.2.1 Oracle Quoting and Oracle TeleSales

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

To process information during each sales cycle phase, the sales representatives access Oracle TeleSales eBusiness Center. The sales representatives click the Leads tab to process information on a lead. They also click the Opportunity tab to process information on an opportunity.

When a Sales Representative is working with a customer who is interested in adding items to a quote, he clicks the Quote/Order tab. In this tab, he/she can view all the quotes for the customer by clicking Quotes from the View pull-down menu.

A list of quotes for the customer displays. To view details of a selected quote, select the quote and click **Detail**. The Quoting form for that selected quote displays.

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

Alternatively, if the sales representatives find out that creating a new quote is required, they can click **New**.

Once the sales representatives click **Detail** or **New**, the Quoting form displays. The Oracle TeleSales end user can then use the Quoting form to:

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

1.2.2 Oracle Quoting and Oracle Customer Care

Oracle Customer Care is used to track customer interactions and services after a quote is submitted. When customers request help with a product they ordered, they sometimes discover they need to order additional items. Oracle Customer Care representatives can access the Quoting form from Oracle Customer Care's Quick Menu and prepare quotes.

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

Ms. Lee accesses the main Oracle Customer Care interface — the Contact Center. She chooses **Tools > Quick Menu**. Ms. Lee then clicks **Order Capture**. The Quoting form displays. Ms. Lee starts a new quote for Business World that includes the five cables.

1.2.3 Oracle Quoting and Oracle iStore

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

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

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

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

Mr. Johnson reaches an Oracle TeleSales representative. Mr. Johnson provides the shopping cart name. The Oracle TeleSales representative accesses the shopping cart name through Quote/Order tab in the eBusiness Center. Since Mr. Johnson and Business World have done business with Vision Corporation before, the customer information is available. The Oracle TeleSales Representative updates Mr. Johnson's cart/quote.

Summary

- When an Oracle iStore shopping cart with products is saved, you can use Quoting to access the cart.
- You can retrieve and modify the shopping cart in Quoting using the customer name and the shopping cart name.
- Any changes made in Quoting can then be viewed by the customer in Oracle iStore. The customer can subsequently place the order in Oracle iStore.
- Due to the integration between Quoting, Oracle TeleSales, and Oracle Customer Care applications, the Oracle iStore shopping cart can be viewed and modified by Oracle TeleSales and Oracle Customer Care users.

1.3 Understanding the Quoting Form

The Quoting form is divided into the following regions:

- The Header Information Region
- The Item View Tab
- The Quote Lines View Tab
- The Bill To Tab
- The Ship To Tab
- The Payment Tab
- The Quote Total Region
- Save and Submit Buttons

See also:

- Customer Types
- Understanding Quotes
- Understanding Quote Status
- Understanding Orders
- How Items are Priced and Discounted
- Related Items: Cross-Sell, Up-Sell, and Substitute

1.3.1 The Header Information Region

The Header Information region displays:

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

1.3.2 The Item View Tab

Use this tab to perform the following tasks:

- Select basic information and view prices of items your customer may be interested in purchasing. See Chapter 2, "Using Oracle Quoting" for details.
- View the availability of an item by checking the Available Qty field. (This functionality is available only if your administrator has enabled it in Quoting.)
- View and modify the quantity of an item.
- View the price of an item and modify it by changing your price list selection or manually adjusting it. See Chapter 2, "Using Oracle Quoting" for details.
- Add items to the quote.

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

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

The Current Item field indicates the position of an item in the quote.

If the Current Item field is blank and:

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

The Items in Quote field shows the total number of items in the quote. A blank Items in Quote field means the quote is empty.

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

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

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

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

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

You can view warranty information for the item displayed by clicking **View Warranty**, which is enabled only if the item is serviceable. Included warranties are included in the purchase price of the item and do not show up as a separate line item in the quote.

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

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

1.3.3 The Quote Lines View Tab

The Quote Lines View tab lists the contents of the quote you have created. You cannot make any changes here. You must go to the Item View tab to view item details and modify the contents of the quote.

1.3.4 The Bill To Tab

The Bill To tab displays the bill-to information for the order as a whole.

- Bill-to Customer — The name of the customer who will be invoiced for the goods or services ordered. This may be the same as the sold-to customer.
- Bill-to Contact — A person representing the bill-to customer who deals with all invoice-related matters for the order. This is an optional field.
- Bill-to Address — A physical location where the invoice is sent. You must enter this before you can place the order.

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

See Section 1.5, "Customer Data: Sold-To, Bill-To, Ship-To" for more information on bill-to customer data.

Address Detail

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

1.3.5 The Ship To Tab

The Ship To tab displays the ship-to information for the order as a whole.

- Ship-to Customer — The name and financial account information of the customer to whom the goods or services are delivered. This may be the same as the sold-to customer or the bill-to customer, but is still logically a different entity on the quote/order.
- Ship-to Contact — A person representing the ship-to customer, who can be contacted about any issues pertaining to the shipment of the items and generally to whom the products are sent.
- Ship-to Address — A physical location where the goods or services are sent

If you do not enter any values here, Oracle Order Management uses the bill-to address as the ship-to address when it receives the order from Quoting.

See Section 1.5, "Customer Data: Sold-To, Bill-To, Ship-To" for more information on ship-to customer data.

1.3.6 The Payment Tab

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

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

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

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

Customers can pay for an order by:

- Cash
- Check
- Credit card
- Purchase order

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

1.3.7 The Quote Total Region

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

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

1.3.8 Save and Submit Buttons

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

> **Note:** If an item is displayed in the Item View tab but not added to the quote, when you try to save the quote, a message appears asking if you want to continue without adding the item to the quote.

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

1.4 Customer Types

You can sell to two types of customers:

- Person
- Organization

Note: You can create customers in Quoting by choosing **Enter Customer** from the Actions menu. This menu option calls up the Oracle Receivables form that you can use to create customers. For more information on how to create customers in Oracle Receivables refer to the *Oracle Receivables User's Guide, Release 11i.*

Parties of type **person** are individuals who are purchasing on their own behalf. A person can have multiple addresses and phone numbers. For example, a person can have a home address and multiple shipping addresses for vacation homes, friends, and relatives.

Parties of type **organization** may be a company, a company subsidiary or branch, an association, a church, or a government branch. Each organization must have a primary address, yet can have multiple addresses and contacts associated with it. Each address belongs to the organization, not to individual contacts for the organization.

A **contact** represents an organization. Any individual at an organization can be your contact. Contacts within an organization are set up with roles such as contact for or employee of.

1.5 Customer Data: Sold-To, Bill-To, Ship-To

To create quotes and orders, certain standard customer information is necessary. The bill-to and ship-to information, which is optional when creating the quote, becomes mandatory when transforming the quote into an order. This customer data can be grouped into the following areas:

Sold-To:

- Sold-To Customer — The name and financial account of the customer. Sometimes only the name of the customer is known, as there may not be a financial account set up for the customer. The sold-to customer is financially responsible for the order; for example, credit and collections contacts the sold-to customer if payment is not received.

- Sold-To Contact — A person representing the sold-to customer, generally only when the sold-to customer is of party type organization. This field is optional.

> **Note:** Once you leave the header information region, after entering the sold-to customer information, the sold-to customer information automatically defaults into the Bill To and Ship To tabs. But, if you change the sold-to customer, upon leaving the header information region, the sold-to account, contact, and phone number as well as the bill-to and ship-to customer details (including any line level split shipment addresses) are re-defaulted based on the change.

Bill-To:

- Bill-To Customer — The name and financial account of the customer who will be invoiced for the goods or service ordered. This may be the same as the sold-to customer in many cases. If the bill-to customer is different from the sold-to customer, then depending on the ASO: Create Customer Account profile option setting, you can:

  a. Select any party with or without active accounts

  b. Select only parties that have an account that has a relationship with the sold-to customer’s account.

  If you are able to select a party without an account, then when you tab out of the customer field, an account is created for that party. If an account relationship does not exist, it is created when the order is submitted.

- Bill-To Contact — A person representing the bill-to customer who deals with all invoice-related matters for the order. The relationships between bill-to customer and bill-to contact can only be "person to person" or "person to organization," not "organization to organization." This is an optional field.
- Bill-To Address — A physical location where the invoice is sent. This address can be associated with either the bill-to customer or the bill-to contact. Depending on the profile option setting, if you choose an address that is not of type bill-to, then it is created as a bill-to address when the quote is submitted as an order.

Ship-To:

- Ship-To Customer — The name and financial account information of the customer to whom the goods or services are delivered. This may be the same as the sold-to customer or the bill-to customer, but is still logically a different entity on the quote/order. If the ship-to customer is different from the sold-to customer or bill-to customer, then depending on the profile option setting, you can:

  a. Select any party with or without active accounts

  b. Select only parties that have an account, which have a relationship with the sold-to customer's account.

  If you are able to select a party without an account, then when you tab out of the customer field, an account is created for that party. If an account relationship does not exist, it is created when the order is submitted.

- Ship-To Contact — A person representing the ship-to customer, who can be contacted about any issues pertaining to the shipment of the items and generally to whom the products are sent. You can select any party of type person that has a relationship to the ship-to customer. This is an optional field.
- Ship-To Address — A physical location where the goods or services are sent. The ship-to address can be associated with either the ship-to customer or ship-to contact. If you select an address that is not of type ship-to, it is created as a ship-to address when the order is submitted.

ASO: Create Customer Account

The choices you are presented with when selecting a sold-to, bill-to, or ship-to customer, account, and contact are affected by the setting of the profile option ASO: Create Customer Account. If this profile is set to Yes, Quoting allows you to choose any party with or without active accounts as follows:

- If there is only one active account for the customer, Quoting automatically defaults that account into the Account field.
- If there are multiple active accounts for the customer, Quoting prompts you to choose an account.
- If there are no active accounts for the customer, an account is created for the party. If the party is active and the customer accounts are inactive, Quoting creates the customer account.

A relationship is also created between the sold-to customer and bill-to or ship-to customer.

If the profile is set to No, then a customer account is mandatory for creating the quote. If there are no valid accounts, an error message appears. Existing relationships with the sold-to account are also mandatory.

1.6 Understanding Quotes

A quote is an offer to a customer that contains priced items and shows a total price for the offer. You create a quote when you accumulate items in the Quote Lines View for a customer and save your work.

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

For example, your administrator can specify that if a quote is in the draft stage, any changes you make simply overwrite your previous entries. If the quote status is bid, then each time you save a modified quote, the application creates a new version. These restrictions and permissions can be fully determined by your organizational policies and implemented by your System Administrator. See Section 1.7, "Understanding Quote Status" for more details.

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

1.7 Understanding Quote Status

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

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

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

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

1.7.1 Pre-Defined Quote Statuses

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

Table 1–1 Default Quoting Quote Statuses

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

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

1.7.2 Rules for Quote Status Changes

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

The following table shows the suggested transition rules for quote status changes. The columns show the different statuses. The rows show the permissible status changes.

For example, a quote with the status of Accepted can only be changed to Order Problem, Order Reviewed, Lost, Inactive, Ordered or Entered. A quote with the status of Ordered cannot be modified.

Table 1–2 Suggested Permissible Quote Status Changes

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

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

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

1.8 Understanding Orders

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

When you place an order, Quoting passes the order to Oracle Order Management, an application that determines how the order is fulfilled. You receive a confirmation number, which is the order number in Order Management. Use this number in Order Management to track final shipping costs and to verify that an order has been shipped.

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

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

Use Quoting to update and modify quotes, not orders. You must use Oracle Order Management to make changes to an order after it is submitted.

You can access some of the Order Management forms through the Orders tab in the Customer History form. See Chapter 2, "Using Oracle Quoting" for more information.

1.9 Related Items: Cross-Sell, Up-Sell, and Substitute

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

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

System Administrators can set up additional types of related items in Oracle Inventory.

1.10 How Items are Priced and Discounted

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

1.10.1 Price Lists

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

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

1.10.2 Discounts

Oracle Quoting allows both order-level and line-level discounts. Order-level discounts are applied to each line on the quote, while line-level discounts are applied to specific line items only. If there are multiple discounts available for an order or a line, the application combines them.

Example

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

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

1.10.3 Pricing Adjustments

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

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

1.10.4 Manual Adjustments

You can manually adjust prices at the line level in Oracle Quoting, if the profile option ASO: Discounting Privilege is set to Full. If this profile option is set to Full, you can modify the Unit Net Price field to reflect an adjustment.

There must also be a modifier set up in Pricing where the Override flag is checked and the adjustment amount/percent is zero. Changing the net unit price on the Quoting form overrides the adjustment amount of the modifier value (zero) and changes it to the indicated amount.

There are two types of manual adjustments:

- Discount — An adjustment that reduces the net price and is displayed as a negative amount and percent in the adjustment form.
- Surcharge — An adjustment that increases the net price and is displayed as a positive amount and percent in the adjustment form.

Note: The manual adjustment cannot make either the item total price or extended total negative. The unit net price can be a negative value.

Repricing Rules

If repricing leads to changes at the item and or header level, the manual adjustments should remain unchanged, as illustrated in the following table.

Table 1–3 Repricing Example

	Before Reprice	After Reprice
Unit List Price	$100.00	$100.00
Automatic Adjustment	$20.00	$10.00
Manual Adjustment	$20.00	$20.00
Unit Net Price	$60.00	$70.00

Note: Currently, Quoting only supports manual overrides of net price, not percentages.

1.11 Understanding Tax Exemption

There are three options to choose from when it comes to tax handling for customers.

- Exempt — The present quote is exempt for a normally taxable customer site.

  If Exempt is selected as the tax handling method, you must enter an exemption number and reason.
- Require — This quote is taxable for a normally nontaxable ship-to customer or item.
- Standard — Taxation for this quote should be based on existing exemption rules.

Tax exemptions can be set up for customers, items, or a range of items using tax codes in Oracle Receivables. For more information, refer to the *Oracle Receivables User Guide*.

1.12 Understanding the List of Values (LOV) Fields

The Customer Type, Customer, Account, and Contact LOVs in Quoting are closely integrated.

The following table demonstrates how the integration between these fields controls the behavior of the LOVs.

Table 1–4 LOV Behavior

Customer Type Specified	Query	The LOV Displays
Person	Customer Field	Active parties of type person: first name, last name, and all active accounts for each party.
Organization	Customer Field	Active parties of type organization: party name and active accounts for each party.
Person	Account Field Customer Field = null	All accounts for customers of type person.
Organization	Account Field Customer Field = null	All accounts for customers of type organization.
Person	Contact Field	All contacts for the customer displayed in the Quoting form, if any exist.
Organization	Contact Field	All contacts for the organization displayed in the Quoting form, if any exist.

In Quoting, if the Customer Type is organization, querying on the Customer field retrieves a pick list that details the organization name and account number. If the Customer Type is person, querying on the Customer field retrieves a pick list that details the first name, last name, and account number. There may be duplicate customer names with different account numbers.

If you choose a person or organization from this LOV list, the assigned account number is uploaded automatically.

Contacts can only be of type person and must have a valid relationship with the customer. The relationships can only be "person to person," or "person to organization," not "organization to organization."

1.13 Understanding the Item and Price List LOVs

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

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

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

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

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

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

The following table demonstrates the relationships between the Item, UOM, and Price List LOVs affect their values.

Table 1–5 Item, UOM, and Price List LOV Behavior

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

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

1.13.1 Agreements

If an agreement is selected in the Payment tab, Quoting automatically populates the Price List field based on the agreement. You can override the default price list by choosing one from the Price List LOV.

1.13.2 Related Items and Warranties

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

When you select a related item or service, Quoting displays an LOV form with a list of valid price lists for you to choose from. If only one price list exists, the system automatically chooses that price list and prices the item accordingly.

See Section 2.22, "Cross-Selling, Up-Selling, and Substituting Items" for information on how to choose a related item for an item currently in the Item View tab.

See Section 2.19, "Viewing Warranty Information for an Item" for information on how to choose a warranty for an item currently in the Item View tab.

1.14 Understanding Quoting Security

In a sales environment, users need the ability to restrict access to quotes. However, the ability to view all quotes with unrestricted access must also be maintained for those environments where security is not a concern. Role attributes, roles, and role types are used to establish a user's security level in Quoting.

1.14.1 Setting Up Security

To use Security in Quoting, you must perform the following tasks:

- Set up role types in Resource Manager or use the seeded values.
- Set up roles in Resource Manager or use the seeded values.

  If you elect to set up your own roles, you must assign a role type to each role. You must also choose role attributes for each role. Role attributes are defined by the Resource Manager application and cannot be created or modified. Quoting checks only for the role attributes "manager" and "active."
- Define resources and assign roles to them.

  Resources are the employees to whom you assign roles. You can either enter a new resource or find an existing resource and add roles to its Role tab.

Note: Make sure that you enter a value in the User Name and Salesperson Number fields.

For more information on setting up role types, roles, or resources, refer to the *Oracle CRM Foundation Concepts and Procedures*.

- Create OC User IDs for your employees.

  Create the user names and passwords for your resources, and assign them responsibilities. Each employee, or resource, must have a user ID to log in to Quoting. Be sure to enter the resource name in the Person field when setting up the user IDs. When you assign a user ID for an employee, that user ID takes on all the roles associated with that resource. Therefore, when the employee logs in to Quoting, the application knows what the employees roles are.

  For more information on setting up Quoting User IDs, refer to the *Oracle Applications System Administrator's Guide*.

- Set the Security profile options, based on your business needs. For more information, see the *Oracle Quoting - Forms Implementation Guide*.

1.14.2 Security Options

The level of security available is determined by the settings of the security profile options. You may want to determine who has the ability to query and update all quotes, rather than just their own or you may not want to use any security at all. These profile options allow you to determine what aspects of security your application includes.

Option 1: Turn Security On or Off

Administrators have the ability to turn security on or off, using the site level profile option ASO: Enable Security Check. If security is turned off, all users can query all quotes with no restriction. The ability to turn security off would primarily be employed by companies that are using the Quoting application as an order entry tool.

If security is turned on, the administrator must specify the Resource Manager "Role Type" through the application level profile option ASO: Role Type. Only roles assigned to the selected Role Type are used for Quoting Security. This allows the roles set up for another application to be used for quoting (for example, Oracle TeleSales) or enable the use of custom Quoting roles.

If security is turned on, the application checks to see if the user has been assigned one or more roles for the selected Role Type. If the user has not been assigned one or more roles for the specified Role Type, that user is outside of the security system and can query all quotes with no restriction.

If the user has been assigned one or more roles for the selected role type, the following functions are available:

- For all roles of the selected role type, if there are one or more roles assigned to the user with the "Manager" attribute = Yes, the user can query all quotes with no restriction.
- For all roles of the selected role type, if there are NOT one or more roles with the "Manager" attribute = Yes assigned to the user, the user can only query quotes for which the user is the sales representative.

> **Note:** The sales representative is NOT necessarily the quote creator. The quote creator defaults as the sales representative for the quote, but the quote creator or anyone with the Manager attribute has the ability to reassign the quote to another user by changing the sales representative information on the quote main form.

Option 2: Order Submission Security

Administrators have the ability to restrict order submissions. This ability is controlled by the ASO: Enable Submit Button setting at both the responsibility and user level. If the profile is set to Yes, any user can submit orders from Quoting. If the profile is set to No, the Submit button is disabled on the main form.

Option 3: Order Management Access Security

The final security option is the ability to provide view-only access to Order Management when Order Management in launched from the Order History form. This ability is controlled by the profile option ASO: OM Access setting at both the responsibility and user level. If the profile option is set to Full, you can see all orders for the selected customer. You can make changes to the order once it is opened in Order Management. If the profile is set to Read-only, you can only access orders created from an unrestricted quote. None of the information displayed in the OM forms is updateable.

2 Using Oracle Quoting

2.1 Overview of Using Oracle Quoting

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

- Creating a Quote
- Selecting an Existing Customer in the Quoting Form
- Creating a Customer
- Selecting an Item in the Item View Tab
- Clearing an Item from the Item View Tab
- Adding Items to the Quote
- Removing Items from the Quote
- Entering Payment Information
- Entering Tax Handling Information
- Entering Bill-To Information
- Entering Ship-To Information
- Splitting Shipments
- Searching Using the Query Method
- Viewing the List of Items in the Quote
- Scrolling Through the Items in the Quote
- Determining If an Item Has Been Added to the Quote
- Adding a Service to the Quote

- Viewing Warranty Information for an Item
- Entering Installation Details
- Configuring an Item
- Cross-Selling, Up-Selling, and Substituting Items
- Finding Out When an Item Will Be Available
- Pricing an Item
- Pricing Configurable Items
- Adjusting the Price of an Item in a Quote
- Adjusting Prices for a Whole Quote
- Manual Adjustments
- Viewing Adjustments
- Allocating a Sales Credit
- Trade-Ins
- Viewing and Adding Notes to a Quote
- Searching for Notes
- Creating an Attachment
- Viewing an Attachment
- Copying an Attachment from Another Quote
- Deleting an Attachment
- Copying a Quote
- Printing a Quote
- Viewing the Status of a Print Job
- Viewing the History of a Quote
- Viewing Customer Quotes
- Modifying a Customer Quote
- Viewing the Order History for a Customer
- Placing an Order
- Using Descriptive Flexfields

2.2 Creating a Quote

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

The behavior of the Customer and Account LOVs in the header depends upon the ASO: Create Customer Account profile option setting. See Section 1.5, "Customer Data: Sold-To, Bill-To, Ship-To" in Chapter 1, "Understanding Oracle Quoting" for more information.

Prerequisites

None

Steps

1. Log in to Oracle Forms with the Order Capture Sales Agent responsibility.
2. Choose Quoting from the Navigator.
3. Enter the customer information for the quote.
   a. Use the Customer Type LOV to select the type of customer: person or organization.

      The Customer Type field has a default value, so you only need to do this step if you want to change the customer type.
   b. Use the Customer LOV to select the name of the sold-to customer.
   c. Use the Account LOV to select an active account number for the customer. If there is only one account number for the customer, this field automatically populates when you select a customer.
   d. Optionally, use the Contact LOV to select a contact for the customer, if one exists.
   e. Use the Phone LOV to select a phone number.

      You can only enter a phone number if the customer is of type person or there is a contact associated with the customer. You cannot enter a phone number for parties of type organization without a contact. This field is optional.
   f. Enter a name for the quote in the Quote Name field.
   g. Use the Sales Rep LOV to select a sales representative for the quote.
4. Add items to the quote.

a. Use the Item LOV in the Item View tab to select an item.

b. Use the UOM LOV to select a unit of measurement for the item. The default UOM for the item automatically populates the field.

c. Enter the quantity you wish to purchase in the Qty field.

   This field is automatically populated based on the profile option ASO: Default Ordered Qty in OC UI setting.

d. Use the Price List LOV to choose a price list for the item.

e. If the item has related items available, the **Related Items** button is enabled. Use this button to cross-sell, up-sell, or substitute an item.

f. Click **Add to Quote**.

   Once you click this button, the item shows up in the Quote Lines View tab.

5. Apply discounts by changing price list selections or by manually adjusting the price. This is an optional step. For instructions, see Section 2.26, "Adjusting the Price of an Item in a Quote", Section 2.28, "Manual Adjustments", and Section 2.27, "Adjusting Prices for a Whole Quote".

6. Click **Save.**

   The application saves the quote and generates a quote number which is displayed in the Quote # field in the Header Information region.

2.3 Selecting an Existing Customer in the Quoting Form

Use this procedure to find and select a customer in the Header Information region of the Quoting form. This customer is known as the sold-to customer.

Prerequisites

The customer must exist in the database as a party of type person or organization.

Steps

1. Navigate to the Quoting Form.

2. Click on the LOV in the Customer Type field

   If you customer is a business, choose organization. If your customer is an individual, choose person.

3. Use the LOV in the Customer field to enter the customer's name, or enter at least the first letter of the customer name and a wildcard (%).

If the Customer Type is designated organization, the LOV displays active parties of type organization and their active accounts. If the Customer Type is designated person, the LOV displays active parties of type person and their active accounts. For more information, see Section 1.5, "Customer Data: Sold-To, Bill-To, Ship-To".

4. Use the LOV in the Account field to enter the customer's account number.

   The LOV displays all active accounts for the selected customer. If the customer has only one account, Quoting automatically populates the Account field when you enter the Customer.

   - If no account exists, then one can be created for the customer.
   - If no customer was selected, the LOV displays all accounts and their related parties.

5. Use the LOV in the Contact field to enter a contact for the customer.

   The LOV displays all parties of type person that have a party relationship with the sold-to customer. This field is optional.

You can also enter a customer simply by entering the account number into the Account field (The account must be for the customer type displayed on the main form). Quoting then populates the Customer field.

Note: See Section 1.12, "Understanding the List of Values (LOV) Fields" for a detailed explanation of the LOV behaviors on the form.

2.4 Creating a Customer

Use this procedure to create a new customer in Quoting.

Prerequisites

None

Steps

1. Choose **Actions > Enter Customer**.

   The Oracle Receivables customer form appears.

2. Fill in the form as described in the *Oracle Receivables Users Guide, Release 11i*.

2.5 Selecting an Item in the Item View Tab

Use this procedure to select an item in the Item View tab.

Prerequisites

None

Steps

1. Navigate to the Item View tab.
2. Place your cursor in the Item field.
3. If the Item View tab already displays an item, then click **New Record** in the toolbar.
4. Use the LOV to enter the item.

   The item displays in the tab. You are now ready to add the item to the quote.
5. Click on the Item Attributes button to the right of the Item Field to view the item attributes.

   This is necessary if you wish to know if the item is returnable, serviceable, or shippable.

2.6 Clearing an Item from the Item View Tab

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

Prerequisites

The item must be displayed in the Item View.

Steps

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

2.7 Adding Items to the Quote

Use this procedure to add items to the quote.

Prerequisites

Your customer must be displayed in the Header Information region of the Quoting form.

Steps

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

   The item displays in the tab.
5. Click on the Item Attributes button to the right of the Item field to see the item attributes.

   This Item Attributes form indicates whether the item is returnable, serviceable, or shippable.
6. Enter the quantity in the Qty field.
7. If the Item Type is Model, then the item is configurable. The item displayed is the base model. You can configure this item to add more components.

   For all other items the item pricing appears. The Unit Price shows the list price of this item from the price list shown in the Price List field.
8. If the Related Items button is enabled, you can view and select up-sell, cross-sell, and substitute items.
9. If you wish to add this item into the quote, click **Add To Quote.**
10. Repeat this procedure to add other items to the quote.

    When you are done you are ready to:

    - Create a quote
    - Place an order

2.8 Removing Items from the Quote

Use this procedure to remove items from the quote.

Prerequisites

There must be at least one item in the quote.

Steps

1. Navigate to the Item View tab.
2. Check to make sure you are viewing the contents of the quote.

   If the Item View tab displays an item not in the quote, then clear it by clicking **Clear.**
3. If the quote contains multiple items, use the arrow buttons to display the item you wish to delete.
4. With the item is displayed in the Item View tab, click **Remove.**

2.9 Entering Payment Information

Use this procedure to enter payment information for your customer.

Prerequisites

The Header Information region must display the customer.

Steps

1. Choose the Payment tab.
2. Use the Agreement LOV to enter an agreement, if one exists.

   Note: Agreement terms with a customer are set up by your company in Oracle Pricing. Agreements can include price lists, discounts, payment terms, and shipping address.

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3. Select the payment terms using the Payment Terms LOV.
4. From the Payment Type drop-down list, select the payment type.
   - If you have selected cash as the payment type, click **Save** on the toolbar.

- If you have selected check as the payment type, then enter the check number in the Number field.
- If you have selected purchase order as the payment type, then enter the purchase order number in the Number field.
- If you have selected credit card as the payment type, then:
  - From the Credit Card drop-down list, select the credit card type.
  - Enter the credit card holder's name.
  - In the Number field, enter the credit card number.
  - Enter the expiration date.

5. Click **Save** on the toolbar.

> **Note:** If Oracle iPayment is also installed, the application performs a credit card check and displays an approval code once the quote is submitted as an order. For more information, consult the *Oracle iPayment Concepts and Procedures*.

2.10 Entering Tax Handling Information

Use this procedure to enter tax exemption information for a quote. Tax handling options are located in the Other tab on the main Quoting form.

There are three tax options:

- Exempt — The current quote is exempt for a normally taxable customer site.
- Require — The current quote is taxable for a normally non-taxable ship-to customer or item.
- Standard — Taxation for the current quote should be based on existing exemption rules.

Prerequisites

None

Steps

1. Click on the Other tab in the main Quoting form.
2. Use the Tax Handling LOV to select the tax method.

a. If you select Exempt, then:

* Enter the exempt number in the Exempt Number field. You can select an pre-defined tax exemption certificate from the LOV or enter a new, unapproved exemption number certificate.

* Enter an exempt reason in the Exempt Reason field.

  If you choose an exempt number from the LOV, the exempt reason will automatically display in this field. If no reason is defined or you enter an unapproved exempt number, you will be able to select a tax exemption reason from those defined in the Receivables QuickCodes window.

Note: The Exempt Number and Exempt Reason fields are disabled unless you select Exempt as the tax handling method.

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* Save the quote.

b. If you select Require, then save the quote.

c. If you select Standard, then save the quote.

2.11 Entering Bill-To Information

Once the sold-to information is entered into the Quoting form, Quoting automatically defaults the sold-to customer name into the Bill To tab. Use this procedure to enter a separate bill-to customer for an order.

Prerequisites

- The Header Information region of the Quoting form must display the customer.
- The individual to be billed and the billing address must already exist in the database. Depending on the ASO: Create Customer Account profile option setting, the bill-to customer may be either any party with or without an active account, or a party with an active account and a valid relationship to the sold-to customer. See Section 1.5, "Customer Data: Sold-To, Bill-To, Ship-To" for more information.

Steps

1. Select the Bill To tab.
2. Use the Customer Type LOV to select a customer type.

Changing the Customer Type from the value that was defaulted in clears all bill-to fields.

3. If no name appears in the Customer field or you wish to bill a different party, then use the Customer LOV to select the customer's name.

   If you choose a customer that is different from the default value (defaulted from sold-to customer), all of the subsequent bill-to fields clear.

4. Use the Account LOV to select the customer's account number.

5. If a contact exists for the bill-to customer, use the Contact LOV to select the name.

   The LOV displays only those contacts (parties of type person) that have a valid relationship with the bill-to party.

6. Use the LOV to enter the bill-to address.

   The bill-to address LOV displays all existing addresses for both the customer and the contact, if there is one. Therefore, if the bill-to contact changes and the bill-to address belonged to that contact, the address fields clear. If a new contact is selected, you are prompted to use the Address LOV to enter a new bill-to address for either the bill-to customer or contact.

   If there is no bill-to contact, the LOV displays only addresses for the bill-to customer.

7. If the ship-to address is the same as the bill-to address, place a check in the "Ship to the Same Address" box. This will ensure that the bill-to information is copied into the ship-to information.

8. **Save** the quote.

2.12 Entering Ship-To Information

Once the sold-to information is entered into the UI, Quoting automatically defaults the sold-to information into the Ship To tab. The user can also choose to default the bill-to information into the Ship To tab by checking the Ship to Same Address box in the Bill To tab. Use this procedure to enter a separate ship-to customer for an order.

Depending on the ASO: Create Customer Account profile option setting, the ship-to customer may be either any party with or without an active account, or a party with an active account and a valid relationship to the sold-to customer.

Prerequisites

The Header Information region of the Quoting form must display the customer's information.

Steps

1. Select the Ship To tab.
2. Use the Customer Type LOV to select a customer type.

   Changing the Customer Type from the default value clears all ship-to fields.
3. If no name appears in the Customer field or you wish to ship to a different party, then use the Customer LOV to select the customer's name.

   If you choose a customer that is different from the default value, all of the subsequent ship-to fields clear.
4. Use the Account LOV to select the customer's account number.
5. If a contact exists for the ship-to customer, use the Contact LOV to select the name.

   The LOV displays only those contacts that have a valid relationship with the ship-to party.
6. Use the LOV to select the ship-to address.

   The ship-to address LOV displays all addresses for both the customer and the contact (if there is one). Therefore, if the ship-to contact changes and the ship-to address belonged to that contact, the address fields clear. If a new contact is selected, you are prompted to use the Address LOV to enter a new ship-to address for either the ship-to customer or ship-to contact.

   If you wish to ship individual items to multiple locations, follow the procedure outlined in Section 2.13, "Splitting Shipments".
7. **Save** the quote.

2.13 Splitting Shipments

Use this procedure to ship an item to one or more addresses that are different from the ship-to address for the order as a whole. When you view the quote, each quantity of items shipping to different addresses appears on its own line. For example, a customer who is ordering an item with an quantity of 10 can ship two to one address, three to another, and five to a third. After you designate the split shipping addresses, each quantity appears as a separate item in the Quote Lines View tab.

Note: You cannot ship components of a configured item to different locations. It is assumed that all components of a configured item will be sent to one shipping address.

You cannot split shipments for Model items, or Serviceable items that have a service reference using the Split Shipment functionality. But, it is possible to enter separate line items as a workaround. For example, the customer orders six configured computers and wants to ship three to the home office and three to a remote office. Since you cannot split shipment for configured items, you enter each set of three computers as a separate line item.

Prerequisites

- You must enter an address in the Ship To tab before opening the Split Shipment form.
- The items that you wish to ship to multiple locations must be defined as shippable items. To verify that an item is shippable, click on the Item Attributes button to the right of the Item field.
- You must save your quote before performing this procedure.

Steps

1. Use the arrow keys in the Item View tab to display the item you wish to ship to alternate destinations.
2. Place the cursor in an Item View field.
3. From the Actions menu, choose **Split Shipment.**

   The Split Shipment form opens. The header section displays the current shipment information for the item.

4. In the Split Shipping section, enter the quantity you wish to send to another shipping address.

   You can specify a part of the total quantity or the whole quantity, depending on whether you want to send an item to one or more shipping addresses.
5. Use the Customer Type LOV to enter the customer type.
6. Use the Customer LOV to enter the name of the customer to ship to.
7. Use the Account LOV to enter the account for the customer.
8. Use the Contact LOV to enter a contact for the customer.
9. Use the Address LOV to enter the address details for the customer.
10. Use the Shipping Method LOV to enter the shipping method for the split shipment.
11. Click **Instructions** to enter instructions for Shipping or Packing.
12. Click **OK** to post the text and close the Instructions window.
13. Click **Apply** to post the split shipment address.

    The address displays in the Split Shipping table.
14. If you wish to ship another quantity of the same item to a different destination, click **New**.
15. To remove a split shipping address, click **Remove**. Click **Cancel** to cancel the entire split shipment process.
16. To change a split shipment that has already been applied, highlight the line in the table. The information appears in the fields below. Modify the record and then click **Apply**.
17. Click **OK** to save the new shipping address and return to the main Quoting form.

2.14 Searching Using the Query Method

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

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

Prerequisites

None

Steps

1. Place your cursor in one of the fields in the region that you wish to search.
2. From the **View** menu, choose **Query by Example > Enter.**

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

2.15 Viewing the List of Items in the Quote

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

Prerequisites

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

Steps

1. Click on the Quote Lines View tab.

   The list of items in the quote displays.

2. If you wish to view the details of an item in the list, then:
   a. Note the item's position in the list.
   b. Select the Item View tab and scroll to the item.

2.16 Scrolling Through the Items in the Quote

Use this procedure to scroll through the items in the quote.

Prerequisites

Items have been added to the quote.

Steps

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

Click the appropriate button to scroll through the quote:

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

2.17 Determining If an Item Has Been Added to the Quote

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

Prerequisites

The Item View tab displays an item.

Steps

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

2.18 Adding a Service to the Quote

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

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

Prerequisites

Your customer must be displayed in the Header Information region of the Quoting form.

Steps

1. Navigate to the Item View tab.
2. Place your cursor in the Item field.
3. If the Item View tab already displays an item, then click **New** in the toolbar.
4. If the Item View tab is blank, then use the LOV to enter the item.

   The item displays in the tab.

5. Enter either the start date and the end date for the service or the start date, period, and the duration.

   Note: The actual start date of a service item is different than the date entered in the Start Date field you enter when adding a service to a quote. If the serviceable product for the service item is already in Oracle Installed Base, then the start date is the day the product is ordered. If the service item is for a serviceable item that you are ordering, the start date is the actual shipping date of the product plus the value in the Service Starting Delay field (defined for the product in Oracle Inventory).

   ---

6. Click **Add to Quote.**

   The Service Reference form appears.

7. Select the appropriate category from the Service For list:

   - **Quote:** If the service is for an item in a quote.
   - **Order:** If the service is for an item in an order.
   - **Customer Product:** If the service is for an item in a product already installed at a customer site.

8. If the service is for a quote item, use the Reference Number LOV to enter the line number of the item. The reference number is a concatenation of the quote number and the line number of the item.
9. If the service is for an order item, use the Reference Number LOV to enter the line number of the item. The reference number is a concatenation of the order number and the line number of the item.
10. If the service is for an item that is already installed at a client site, enter the serial number of the item.
11. Click **OK** to save and close the Service Reference form, and return to the Quoting form.

    The Service item is added to the quote at this point.

12. Repeat this procedure to add other items to the quote.
13. When you are done you are ready to:

    - Create a quote

- Place an order

2.19 Viewing Warranty Information for an Item

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

Prerequisites

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

Steps

1. Click **View Warranty.**

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

2.20 Entering Installation Details

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

Prerequisites

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

Steps

1. The cursor must be in an Item View field.

1. From the Actions menu, choose **Installation Details.**

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

2. In the Transaction tab, use the Transaction Type LOV to select a transaction type.

3. Enter a quantity.

   This field is dependent upon the designated Type. If the Type requires a quantity, it is enabled. Otherwise, it is a read-only field.

4. If the item requires a new system to be created, then:

   a. Click **AutoCreate System.**

The AutoCreate Systems form appears.

b. Enter the quantity.

c. Enter the other values using the LOVs.

d. Click **OK.**

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

2.21 Configuring an Item

Use this procedure to configure a Model item.

Prerequisites

- The Model item must be displayed in the Item View tab and must be added to the quote.
- Verify that the item is a model item by clicking on the Item Attributes button to the right of the Item field.
- The quote must be saved.

Steps

1. Display the item you wish to configure in the Item View tab.
2. Place your cursor in an Item View field.
3. Click **Configure** or choose **Configure Item** from the Tools menu.

   The Oracle Configurator form appears.
4. In the left pane of the form, select the category of option you wish to add to the base item.

   The items in the category and their descriptions appear in the top right hand pane.

5. Select the item(s) you wish to add to the quote by clicking the check boxes to the left of each item.
6. After adding a component, click on the arrow to the right of the Total Price field to view the total price of the configured item.
7. Click **Done.**

   The items you selected are added to the quote.

> **Note:** To ensure that the item has been properly configured, make sure there are no red asterisks in the category folder icons. A red asterisk next to a category usually means you are missing something from that category.

2.22 Cross-Selling, Up-Selling, and Substituting Items

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

Prerequisites

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

Steps

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

   The Related Items window appears.
2. To add a related item to the quote:
   a. Click on one item in the list to select it.
   b. Click **OK.**

      A pop-up window shows the available price lists for the related item. If only one price list exists, Quoting automatically chooses that price list and prices the item accordingly.
   c. Choose a price list for the related item.
   d. Click **OK** to close the price list window and return to the Quoting form.

3. Repeat the procedure for other items, if any.
4. The first item you selected in the Related Items window and its price is displayed in the Item View tab.
5. Click **Add to Quote** for any item you wish to add to the quote.

Guidelines

Here is how choosing a related item changes the quote:

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

See Chapter 1, "Understanding Oracle Quoting" for more details about related items.

2.23 Finding Out When an Item Will Be Available

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

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

If you want to check the availability for the order as a whole, the cursor must be in the header section of the Quoting form. If you want to check the availability of a specific item, the item must be displayed in the Quoting form and the cursor must be in an Item View field.

Prerequisites

None

Steps

1. From the Actions menu, choose **Check Availability**.

The Availability window opens, displaying either the single selected item or a list of the items in the quote.

2. In order to view details for an item, highlight the row. The item information fills in the fields below the table.

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

3. Click **OK.**

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

2.24 Pricing an Item

Use this procedure to price an item in the Item View tab. The price list of an item can be designated either at the header level or the item level. Price lists at the header level apply to all items in a quote, while price lists at the line level apply only to the item displayed in the Item View. Item level price lists supersede header level price lists. For more information, see Section 1.10, "How Items are Priced and Discounted".

Prerequisites

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

Steps

1. If you wish to apply one price list to all items in your quote, choose a price list from the Payment tab before adding items to the quote.
2. If you wish to apply a price list only to the item displayed in the Item View tab:
   a. Enter the item into the Item View tab.
   b. Enter the quantity in the Qty field.
   c. If the Bill of Materials (BOM) Item Type is Model, then you must view its price following the procedure outlined in Section 2.25, "Pricing Configurable Items".
   d. If the item is a service, then use the Period and Duration LOVs to enter the period and duration of the service.
   e. A default price list automatically populates the Price List field in the Item View tab. Use the LOV to enter a different price list.

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

You are now ready to:

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

For more information, see Section 1.13, "Understanding the Item and Price List LOVs".

2.25 Pricing Configurable Items

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

Prerequisites

The Item View tab must display a Model item. Use the Item Attributes button, located to the right of the Item field, to verify that the item is a configurable item.

Steps

1. Click **Add to Quote** to add the model item into the quote.
2. The Item View tab displays the model item. This is usually the most basic configuration.
3. Configure the item. See Section 2.21, "Configuring an Item" for instructions.

   List prices for each component are visible in the Configurator form.
4. Navigate back to the model you entered originally to view the total price of the item and its options.
5. If your customer decides not to purchase the item after you have configured it, then you must remove the item. The components are removed automatically when you remove the item. See Section 2.8, "Removing Items from the Quote" for instructions.
6. To reconfigure the item, use the **Configure Items** option in the Action Menu.

2.26 Adjusting the Price of an Item in a Quote

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

Prerequisites

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

Steps

You can modify the price for an individual item in your quote using the following methods:

- Manually adjusting the price. See Section 2.28, "Manual Adjustments" for more information.
- Selecting a different price list from the Price List LOV. Different price lists can price the item differently.
- You can also modify the price of an item by selecting the item and then selecting the **Promotions** option in the Action menu. You will see any available promotions that apply to the item. When you select a promotion, the item price is adjusted.

2.27 Adjusting Prices for a Whole Quote

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

Prerequisites

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

Steps

You can adjust the prices for the quote in the following ways:

- If you have not selected any items for your quote, you can modify prices for a whole quote by selecting a different price list for the quote in the Payment tab. See Section 2.24, "Pricing an Item" for more information. Any items that are added will use the new price list selected.
- If you already have items in your quote, you must select the new price list for each item. See Section 2.26, "Adjusting the Price of an Item in a Quote".

- You can also modify the price of a whole quote by selecting the **Promotions** option in the Action menu. You will see all available promotions that are set up in Pricing, even those that are not applicable to your quote. When you select the promotion, the quote price will be adjusted.

To adjust prices for an individual item rather than for the quote as a whole, see Section 2.26, "Adjusting the Price of an Item in a Quote".

2.28 Manual Adjustments

Use this procedure to apply manual adjustments to an item. The manual adjustment could be a discount or a surcharge, for example.

> **Note:** You can only apply adjustments at the line level, not at the header level.

Prerequisites

- The item for which you want to adjust the price must be displayed in the Item View tab.
- The item for which you wish to adjust the price must be added to the quote.
- Manual adjustments are possible if the ASO: Discounting Privilege profile option is set to "Full." If it is set to "Null," the Unit Net Price field is read-only. Refer to Section 1.10, "How Items are Priced and Discounted" in Chapter 1, "Understanding Oracle Quoting" and the *Oracle Quoting - Forms Implementation Guide* for more information.

Steps

1. Add the item, for which you wish to adjust the price, to the quote.
2. Use your cursor to highlight the price listed in the Unit Net Price field.
3. Type in the price you want the item to cost over the current price. It can be a negative value.
4. Click **Add to Quote**.
5. **Save** the quote.

Quoting automatically calculates the adjustment amount based on the list price of the item and enter it into the Adjustment field. You can also view the adjustment in the Price Adjustments form, located in the Actions menu.

2.29 Viewing Adjustments

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

Prerequisites

Items must be added to the quote.

Steps

To view adjustments for the order as a whole:

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

   The Price Adjustments window appears.

   The window lists the adjustments that apply to all lines on the order, but it does not show line level adjustments. You cannot make any modifications.
3. Click **OK** to return to the main Quoting form.

To view adjustments for an individual item:

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

   The Price Adjustments window appears.

   The window lists the adjustments that apply for this line. You cannot make any modifications.
3. Click **OK** to return to the main Quoting form.

2.30 Allocating a Sales Credit

Use this procedure to allocate a sales credit at the header and line level. Often there is more than one sales representative involved with a sales process, so you may need to allocate sales credits to more than one person.

Sales credits entered at the header level default to the line level during the sales compensation calculations. Sales credits can also be specified at the line level. If changes are made at the line level and then changes are later made at the header level, the header level changes will not be reflected at the line level.

You can allocate sales credits to any resource who is set up as a valid sales representative of the sold-to customer. A sales representative can only be listed once for each credit type on the Credit Allocation form.

Prerequisites

The resource for which you want to allocate a sales credit must be set up in AR as a valid sales representative of the sold-to customer.

Steps

1. If you want to allocate a sales credit at the header level, place the cursor in the header of the Quoting form.

   If you want to allocate a sales credit at the line level, place the cursor in the Item View tab.

2. Choose **Sales Credits** from the Actions menu.
3. Use the Salesperson LOV to select the sales representative to whom you want to allocate a sales credit.
4. Use the Credit Type LOV to enter the type of sales credit.

   Credit types are set up in Order Management via the Sales Credit Type form. Each sales credit is classified as either a revenue or non-revenue sales credit type.

   - Revenue sales credit — A sales credit you assign to salespeople based on your invoice lines. The total of all revenue sales credits must equal 100% of your invoice lines amount. Also known as a quota sales credit because it is applied to the sales representatives' quotas.
   - Non-revenue sales credit — A sales credit you assign to your salespeople not associated to your invoice lines. This is given in excess of your revenue sales credits. Also known as a non-quota sales credit because it is not usually applied to the sales representatives' quotas.

5. Enter the percent of the allocation.

   Note: The Revenue Total box must equal either 0% or 100%.

6. Repeat this process for each sales representative credit allocation.
7. Click **OK** to commit your changes.

2.31 Trade-Ins

Use this procedure to enter a line item as a trade-in. This procedure allows you to provide credit to customers for returning existing products when purchasing new products.

Note: If customers have trade-in items, they must also purchase items in the same quote. The order total must be greater than 0.

Pricing, taxes, and shipping for trade-ins are calculated exactly as they are for regular items. When calculating the total price for the order, the returned item is treated as a credit and subtracted from the total.

Whether or not you can use trade-ins depends on the setting of the profile option ASO: Enable Line Type. If this profile is set to "No," the Line Category and Line Type fields will be disabled. The Line Category field will be a read-only field with the value "Order." See *Oracle Quoting - Forms Implementation Guide* for more information.

The Line Category field is governed by the Order Type field on the Payment tab. Quoting supports two Order types:

- Order — Quotes can only contain orderable items.
- Mixed — Quotes can contain different line types rather than just orderable.

The Order Type must be set to "Mixed" before you can use trade-in items. Order Types are set up in Order Management. See the *Oracle Order Management User's Guide, Release 11i* for more information.

Prerequisites

- The line item that the customer wants to trade in must be set up with the line type "Return" in Inventory.
- The item must be "returnable." To verify that it is returnable, click on the Item Attributes button to the right of the Item field.
- The profile option ASO: Enable Line Type must be set to "Yes."

Steps

1. Create a quote by entering the customer information into the Header Information region. See Section 2.2, "Creating a Quote" for more information.

2. Use the Item LOV to select the item your customer wants to purchase.

   The credit your customer receives for the trade-in is applied to this purchase.

3. Click **Add to Quote**.

4. Use the right arrow button to advance to a blank Item View form.

5. Use the Item LOV to select the item that is being traded in.

   You can find out if an item is returnable by clicking on the Item Attributes button to the right of the Item field. You can also limit the items for this LOV by selecting "Return" from the Line Category LOV.

6. Select "Return" from the Line Category LOV.

7. Click **Add to Quote**.

   Quoting calculates the total price based on the current purchase and the trade-in, and displays it in the Total Price field on the Quoting form.

2.32 Viewing and Adding Notes to a Quote

Use this procedure to create notes for a quote. Notes contain descriptive information generated by users about business transactions. Users can reference notes to find additional information about specific quotes or orders.

Prerequisites

The quote for which you want to create a note must be displayed in the Quoting main form.

Steps

1. Click **Notes** in the main Quoting form.

   The Notes form opens, displaying all notes relating to the current quote.

2. Click the **Summary** tab to see the user, date created, entered by ID, and the first line of note text for the highlighted note. Use the arrow key to scroll through and view information for each note.

3. Click **New** to create a new note.

4. Enter the note text into the Notes text field.

5. Click **More** to enter additional text beyond the character limit in the main notes text box.

The Detailed Note form opens, allowing you to add additional text.

6. Click **OK** to close the Detailed Note form.
7. Use the LOV to enter the note type in the Type field.
8. Use the pull down menu to enter the note status in the Status field.
9. Use the LOV to enter the objects the quote is related to in the Related To field.

   You can relate the note to any object in addition to the active quote. The note can have multiple relations.
10. Use the Value LOV to enter a valid reference number for the related section.
11. Save the note by clicking the Save icon on the toolbar or choosing **File > Save**.

2.33 Searching for Notes

Use this procedure to search for notes in the Notes form.

Prerequisites

None

Steps

1. Click **Notes**.

   The Notes form opens.
2. Click on the Search icon in the toolbar.

   The Find Notes form opens.
3. Enter a value into one of the search fields.

   You can search by:

   - Source Code: The application/object from which the note was created. For example, quote
   - Number: The identifier of the object. For example, quote number
   - Entered By: Person who entered the note
   - Entered Date: Date the note was entered
   - Related To: What the note is related to. For example, a quote or an opportunity

- Value: Identifier of related objects. For example, an opportunity number
- Note Type: Type of note
- Notes: Contents of note

4. Click **Search**.

2.34 Creating an Attachment

Use this procedure to create an attachment for a quote. You can add various attachments to their quotes depending on the needs of their business, to store relevant documents or files along with orders in Order Management. For example, you can attach communications from customers or sales representative notes about an order. There are five types of documents you can attach to a quote:

- **Document Reference —** A reference to any type of document stored in a database that is accessed through a Document Management system.
- **Short Text —** Text stored in the database containing less than 2000 characters.
- **Long Text —** Text stored in the database containing 2000 characters or more.
- **File —** A file that requires other server applications to view.
- **Web Page —** A URL reference to a web page that you can view with a web browser.

Prerequisites

- The Quoting form must display the quote to which you want to add an attachment.
- The quote must contain at least one item.
- You must save the quote before creating an attachment.

Steps

1. Click the paper clip icon in the tool bar.

   The Attachments form opens.

2. Use the LOV to select a Category.

The Category controls which applications can access the attachment. The default category is Miscellaneous, as this category is viewable from all applications with attachments enabled.

3. Enter a Description for the attachment.
4. Use the LOV to select the Data Type.

   The attached document can be any of the following data types:

   - **Short Text**
   - **Long Text**

     If the Data Type is Long Text or Short Text, a text field is enabled on the form where you can directly input text.

     – Enter the attachment text into the text form.

     – Click the disk icon in the toolbar to save your work.

   - **Document Reference** - A reference to any type of document stored in a database that is accessed through a Document Management system.
   - **File**

     If the Data Type is Document Reference or File, you must upload your file.

     – Once you select either Document Reference or File as the Data Type, the Upload a File window appears.

     – Click **Browse** to search for your file.

     – Select a file.

     – Click **OK** to apply the file as an attachment.

     A message appears on the browser informing you if the file uploaded successfully.

     – Close the browser to return to the Attachments form.

     The text field on the Attachments form is replaced with an **Open Document** button.

     – Click **Open Document** to view your attached file.

     – Close the browser to return to the Attachments form.

     – Click the Save icon in the toolbar.

   - **Web Page**

If the Data Type is Web Page, you must enter a source in the Source tab.

- The Source tab automatically displays when you select URL from the data type list.
- Type in the URL for the web page in the File or URL field.
- Click **Open Document** to view your attached file.
- Close the browser to return to the Attachments form.
- Click the Save icon in the toolbar.

For more information on attachments, refer to the *Oracle Applications User's Guide*.

2.35 Viewing an Attachment

Use this procedure to view a document that is attached to a quote.

Prerequisites

The quote that contains the attachments you want to view must be displayed in the Quoting form.

Steps

1. Click the paper clip icon on the toolbar.

   The Attachments form opens.

2. Highlight the attachment you want to view.

   a. If the attachment is in the category short text or long text, the document appears in a text block at the bottom of the form.

   b. If the document is a file, web page, or document reference, click **Open Document**.

      The document displays in the browser designated when the attachment was created.

2.36 Copying an Attachment from Another Quote

Use this procedure to copy an attachment from another quote.

Prerequisites

- The Quoting form must display the quote to which you want to add an attachment.
- You must save the quote before adding an attachment.

Steps

1. Click the paper clip icon in the toolbar.

   The Attachments form opens.

2. Click **Document Catalog**.
3. Enter the search criteria into the Find Existing Documents section.

   You can search using the description, category, data type, attached to, or file or URL.

4. Click **Find**.

   The window displays matching documents.

5. Click the box to the left of the document to display the attachment, or place your cursor in the attachment line and click **Preview**.
6. Close the browser to return to the Attachments form.
7. Click **Attach**.

   The Attach button lists a number, which is the number of attachments you are adding to your quote.

8. Click the Save icon in the toolbar.

2.37 Deleting an Attachment

Use this procedure to remove an attachment from a quote. When you delete an attachment, you remove the association between the attached document and the quote.

Prerequisites

None

Steps

1. Display the quote from which you want to remove the attachment.
2. Click on the paper clip icon in the toolbar.

   The Attachments form opens.
3. Select the attachment you want to remove.
4. From the Edit menu, choose **Delete**.
5. A decision window appears asking if you want to delete the attachment, or the document and the attachment.
   - Click **Attachment** to delete the attachment to the file. The file still exists in the Document Catalog.
   - Click **Document and Attachment** to delete the attachment and delete the file from the Document Catalog.
6. Click the Save icon in the toolbar.

2.38 Copying a Quote

Use this procedure to copy a quote. You can copy:

- Quote Header — Header information only.
  - Lines — Header information as well as line item, billing and shipping addresses, and payment information.
  - Notes — Header information as well as all notes associated with a quote.
  - Attachments — Header information as well as all attachments associated with a quote.
- All Quote Info — Includes header information, line information, notes and attachments.

For example, you can use Copy Quote: Quote Header if you need to create another quote for the customer whose quote is currently displayed in the Quoting form. Copy Quote: Quote Header can also be used to create a dummy quote to use as a template for other quotes. Copy Quote: All Quote Info could be useful if you want to create two copies of the same quote with an item difference.

Prerequisites

The original quote must be displayed in the Quoting form.

Steps

1. Place the cursor in a header level field.
2. From the Tools menu, select **Copy Quote.**

   The Copy Quote window appears.
3. In the Copy Quote window under the Copy heading, highlight the radio button for one of these two options:
   - Quote Header: This option copies the basic contact information in the Quoting form header.

     If you choose this option, you can also choose one or more of the following:
     - Lines: This option copies all line item information, billing and shipping addresses, and payment information.
     - Notes: This option copies all notes associated with the quote.
     - Attachments: This option copies all attachments associated with the quote.
   - All Quote Info: This option copies all header and line item information, notes, and attachments.
4. Under the Copy To heading, highlight the radio button for one of these two options:
   - New quote: This option copies the quote information you selected under the Copy heading into a new quote.

     Note: When you create a new version of a quote, all notes and attachments for the quote are copied into the new version, but do not remain with the previous version.

- Revision: This option copies the quote information you selected under the Copy heading into a new version of the existing quote. You cannot create a revision of a quote with Entered or Ordered status.

5. Click **OK.** A new or revised quote is created and appears in the Quoting form. The quote number is automatically generated.

2.39 Printing a Quote

Use this procedure to print a quote. The ability to print a quote allows you to give customers hard copies of quotes that you have entered in the Quoting UI.

The Print Quote report displays most of the information available to you in the Quoting UI, including header level, line level, and pricing information. Oracle Quoting uses Oracle Reports to produce the Print Quote report.

Prerequisites

None

Steps

1. From the Tools menu, select **Print Quote**.

   The Print Quote Options window appears. The Show Adjustments box is checked by default. Therefore, the print out will show all price adjustments and list prices.

2. Click **OK**.

   A Note window opens with a Request ID number. Record this number if you want to view the status of your print job.

3. Click **OK**.

2.40 Viewing the Status of a Print Job

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

Prerequisites

None

Steps

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

   A Requests pop up window opens, displaying your request and its status.
5. To view what the print out will look like, click **View Output**.
6. Close the window.

2.41 Viewing the History of a Quote

Use this procedure to view the history of the current quote. This procedure is useful if you wish to see the details of each version of the quote. Details include creation date, sales agent, status, and amount.

Prerequisites

The quote must be displayed in the Quoting form.

Steps

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

   The Quote History window appears listing basic information about the quote.
2. Click **OK** to close this window.

2.42 Viewing Customer Quotes

Use this procedure to view a list of the quotes prepared for this customer. In this window you can identify whether the Quote was created from an Opportunity and also if a Contract or Order was created from the Quote.

Since previous versions of Quoting do not require account numbers to create a quote, users can view quotes without designating an account number. An account number is required if you want to update or place an order from the quote.

Prerequisites

The customer must be displayed in the Quoting form.

Steps

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

   The Customer History window appears.

2. Select the **Quotes** tab.

   The tab lists all quotes for this customer. Each line lists quote name, quote number, creation date, quote status, quote total, and quote expiration. You can also view information on the opportunity that the quote was created from and the number of the order placed from the quote. See Section 2.43, "Modifying a Customer Quote" if you want to make changes.

3. If the customer has more than one account, the Account field in the header of Customer History window displays an LOV of accounts when you click in the field. Change the account to view the quotes for that account.

2.43 Modifying a Customer Quote

Use this procedure to find and modify a customer quote.

Prerequisites

The customer must be displayed in the Quoting form.

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

Steps

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

   The Customer History window appears.

2. Select the Quotes tab.

   The tab lists all quotes for this customer.

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

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

4. Modify the quote by:

   - Modifying customer information
   - Changing item quantities
   - Adding Items to the Quote
   - Adjusting the Price of an Item in a Quote
   - Entering Payment Information
   - Entering Bill-To Information
   - Entering Ship-To Information
   - Splitting Shipments
   - Creating an Attachment
   - Viewing and Adding Notes to a Quote

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

6. Click **Save.**

   Depending on the status of the quote, the changes you have made are saved either in the version of the quote you are editing or in a new version. See Section 1.7, "Understanding Quote Status" for more information.

2.44 Viewing the Order History for a Customer

Use this procedure to view the order history of the customer currently displayed in the Quoting form. For a given order, the Order History displays information regarding the quote that created the order (if one exists) and the order itself. If an account is selected for the sold-to customer, the Order History displays a list of orders related to the sold-to party and designated account. In addition, you can select a different account belonging to the sold-to customer using an LOV.

Prerequisites

The sold-to customer, whose history you are trying to view, must be displayed in the header of the Quoting form.

Steps

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

   The Customer History window opens, listing all of the quotes for the designated sold-to customer. Click on the header of a column to sort the table by the selected column.

2. Click the Orders tab.

   The Orders tab opens, displaying detailed information for each of the customer's orders, including order number, order status, creation date, order total, quote name, and quote number.

3. Highlight the order for which you wish to view the details.
4. Click **View Quote** to view the quote that preceded the order.

   The main Quoting form opens displaying the quote.

5. Click **View Order** to view the Order.

   The Order Management Sales Order form opens. Close this window to return to the Customer History form.

6. Click **Cancel** to return to the main Quoting form.

2.45 Placing an Order

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

Prerequisites

None

Steps

1. If you are creating an order from a quote, display the quote in the Quoting form.
2. Add items to the quote, if necessary. See Section 2.7, "Adding Items to the Quote" for instructions.
3. Adjust discounts. This is an optional step. It is only necessary if there is a discount you wish to apply to the order. See Section 2.26, "Adjusting the Price of an Item in a Quote", Section 2.27, "Adjusting Prices for a Whole Quote", and Section 2.28, "Manual Adjustments".
4. If the bill-to information in the Bill To tab has not been entered, then enter it.
5. If the ship-to information in the Ship To tab has not been entered, then enter it.
6. If the payment information in the Payment tab has not been entered, then enter it.
7. Click **Submit.**

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

2.46 Using Descriptive Flexfields

Use this procedure to enter information into flexfields.

See the *Oracle Quoting - Forms Implementation Guide* and the *Oracle Applications Flexfields Guide* for more information on setting up flexfields.

Prerequisites

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

Steps

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

A

Oracle Quoting User Interface Reference

This appendix provides a reference to the Quoting User Interface (UI). Each user interface (UI) object in the Quoting window has a unique set of behaviors that may be closely integrated with other fields and with the other Oracle applications with which Quoting works.

A.1 Quoting Form

Use the main Quoting form to view and enter basic information about the customer and the quote.

The following table describes user interface objects on the main Quoting form.

Table A–1 Quoting Form UI Reference

UI Object Name	Type	Description/Usage
Customer Type	Drop-down list	This field is automatically populated based on the profile value of ASO: Default Customer Type. Use the LOV to change the party type of the sold-to customer. The customer can be of party type Person or Organization.

Table A–1 Quoting Form UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Customer	LOV field	Search for the name of the sold-to customer. If the customer type is designated as Organization, the LOV displays parties of type Organization that meet the search criteria, and as part of the query results retrieves any accounts that exist for those parties. If the customer type is designated as Person, the LOV displays parties of type Person and as part of the query results retrieves any accounts for those parties. The Customer LOV shows the following fields: Last Name, Initial, First Name, and Account Number. If the customer is of party type Person, the concatenated first and last name displays in the Customer field. When a customer is selected from the LOV, the customer name displays in the Customer field, and if an account exists, the account number is copied into the Account field. **Note:** The behavior of this field depends on the setting of the profile option ASO: Create Customer Account. If the profile is set to Yes, the LOV shows all parties with or without accounts. If it is set to No, the LOV shows only parties with accounts.
Account	LOV field	Select the financial account number for the sold-to customer. The LOV on the Account field displays only accounts for the designated customer, if the Customer field contains a value. If the Customer field is blank, the Account LOV displays all accounts that match the search criteria and the name of the customer that owns each account.
Contact	LOV field	Select the Contact for the sold-to customer. The LOV displays all parties of type Person that have a valid relationship with the sold-to customer. This is an optional field.

Table A–1 Quoting Form UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Phone	LOV field	Select a phone number for the customer or contact. This field is dependant upon the Customer Type and whether there is a Contact entered. If the Customer Type is Person and there is no Contact, the LOV displays all phone numbers for the sold-to customer. If the Customer Type is Person and there is a Contact, the LOV displays all the phone numbers for the Contact. If the Customer Type is Organization and there is no Contact, the LOV is not available and you cannot enter a phone number. If the Customer Type is Organization and there is a Contact, the LOV displays all phone numbers for the Contact at the organization. Note: Only phone numbers of type "General" are displayed.
Quote Name	Text field	View and modify the quote name. If the quote comes from a saved cart in Oracle iStore, the field is automatically populated with the cart name. The quote name may be different from the cart name if the cart is not saved, but once the cart is saved, the names are the same.
Quote Num	Read-only field	View the quote number. The quote number is a concatenation of the quote number and the version number. The quote number is dependant on the profile option ASO: Automatic Numbering. If this profile is set to Yes, Quoting automatically assigns a number to the quote. If this profile is set to No, the user must enter a value in this field. The behavior of the version number is dependent on whether or not Auto Versioning is set up. If the Auto Versioning flag is set, the version number increments each time the quote is updated and saved. If the Auto Versioning flag is not set, the version number remains the same. You can also copy a quote to a new version.

Table A–1 Quoting Form UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Exp Date	LOV text field	View and modify the expiration date of the quote. It is automatically populated by Quoting according to the setting of profile option ASO: Quote Duration. This field can be modified by using the LOV button to pull up a calendar or typing in a date. Expired quotes cannot be updated.
Sales Rep	LOV text field	Select the sales representative ID. If not specified, the value in the text field defaults to the setting specified by the profile option ASO: Default Salesrep when the order is booked.
Status	LOV text field	View the current quote status and update it. Upon creating a new quote, it is automatically populated by Quoting according to the profile option ASO: Default Quote Status. Use the LOV to change the quote status manually. The changes possible are specified by your system administrator.
Flexfield box	Flexfield LOV	Use this box to enter additional customized information. Use of this field is defined by your system administrator.
List	Read-only field	Displays the total price of the order before adjustments are applied, and shipping and tax charges are added.
Adjustment	Read-only field	Displays the total of the adjustments that are applied to the order.
Net	Read-only field	Displays the net total, which is the subtotal minus the adjustment amount.
Shipping	Read-only field	Displays the freight charges for the order, which are set up in Pricing.
Tax	Read-only field	Displays the tax charges calculated for the order.
Total	Read-only field/LOV field	View the order total in the left field. The currency in the right field defaults to the currency set for the customer in Oracle Pricing. Change the currency for the order total using the LOV in the right field. Quoting performs the conversion and returns the order total in the left field in the new currency.
Notes	Button	Click this button to open the Notes form.
Cancel	Button	Click to cancel and close the form.

Table A–1 Quoting Form UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Save	Button	Click to save the modifications you made to the quote since the last the last time you saved.
Submit	Button	Click to submit the quote into an order in Oracle Order Management. If your submission is successful, a window containing a confirmation number appears. Use this number to track the order in Order Management. If the submission is unsuccessful, an error message appears.

See Also:

- Section A.2, "Item View Tab"
- Section A.3, "Quote Lines View Tab"
- Section A.4, "Bill To Tab"
- Section A.5, "Ship To Tab"
- Section A.6, "Payment Tab"
- Section 1.5, "Customer Data: Sold-To, Bill-To, Ship-To"
- Section 2.2, "Creating a Quote"
- Section 2.14, "Searching Using the Query Method"
- Section 2.43, "Modifying a Customer Quote"
- Section 2.27, "Adjusting Prices for a Whole Quote"

A.2 Item View Tab

Use the Item View tab to search for items and add them to the quote.

The following table describes the user interface objects on the Item View tab of the Quoting form.

Table A–2 Item View Tab UI Reference

UI Object Name	Type	Description/Usage
Double Left Arrow button	Button	Click to go to the first item in the quote.
Left Arrow button	Button	Click to go to the previous item in the quote.
Current Item	Read-only field	Displays the position of an item in the quote. If the Current Item field is blank, then the item has not been added to the quote.
Right Arrow button	Button	Click to go to the next item in the quote. If you are viewing the last item in the quote, clicking this button creates a new item in the quote.
Double Right Arrow button	Button	Click to go to the last item in the quote.
Items in Quote	Read-only field	Displays the total number of lines in the quote. A blank Items in Quote field means the Quote Lines View is empty (no line items have been added to the quote).
Item	LOV text field	Type in the item number or use the LOV to search for an item to add to the quote. When you select an item from the LOV, the left Item field is populated with the item number, while the right Item field is populated with the item name. You can also use the LOV on the left item field to search for an item by name.
Item Attributes Oval button	Button	Click to view the attributes for the item displayed in the Item field. The Item Attributes window displays the BOM item type, the Inventory item type, and whether or not the item is returnable, serviceable, shippable, and has support service.

Table A–2 Item View Tab UI Reference (Cont.)

UI Object Name	Type	Description/Usage
UOM	LOV text field	View and change the unit of measure of the product. It is automatically populated by Oracle Quoting according to the default UOM set up for this product in Inventory. Use the LOV to change the UOM manually.
Qty	Text field	Enter the quantity of the product that the customer would like to order. Oracle Quoting automatically populates the field with the default value set up in the profile option ASO: Default Ordered Qty in OC UI when you enter an item.
Price List	LOV text field	Designate which price list the price of the item should come from. You can select a different price list for each line. The header level price list automatically defaults into this field. Use the LOV button to change it manually. If an item is not selected, the LOV displays all price lists available. If an item is selected, the LOV displays only price lists which pertain to the item. This field also limits the Item LOV to show only items on the designated price list. **Note:** The user should choose the currency before choosing a price list, as price lists are limited by the chosen currency.
Unit List Price	Read-only field	Displays the list price of the item. This price is determined in Advanced Pricing (i.e. by the price list) and cannot be changed in Quoting.
Start Date	LOV text field	Select the start date of a service item. This field can be modified either by manually entering a date or by using the LOV button to pull up a calendar and choosing a date. This field is enabled only if the item is a service item.
End Date	LOV text field	Select the end date of a service item. This field can be modified either by manually entering a date or by using the LOV button to pull up a calendar and choosing a date. It is not mandatory to enter this field if a start date, period, and duration are entered. In this case Oracle Quoting automatically calculates the end date. This field is enabled only if the item is a service item.

Table A–2 Item View Tab UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Period	LOV text field	Select the period for a service item. For example, a month or year.
Duration	LOV text field	Select the length of time for which a service item is valid. This field supplies the numeric value that along with the period, defines the total length of a service.
Request Date	LOV text field	Enter the date the item was requested by the customer. This field can be modified by either manually entering a date or by using the LOV button to pull up a calendar and choosing a date. This date is used to perform ATP checks. If the field is not populated, OC uses the current date.
Available Qty	Read-only field	Displays the available quantity, as a result of the ATP check.
Adjustment	Read-only field	View any adjustments to the price of a line item or the order as a whole. The user can also adjust the price of an item or the entire order by selecting a different price list, choosing an available promotion, or manually adjusting the Unit Net Price field.
Unit Net Price	Read-only field or Text field	Manually adjust the unit net price of the item. If the ASO: Discounting Privilege profile option is set to "Yes," you can type over the price displayed in this field for further adjustment. If the profile option is set to "No," the field is read-only and displays the Unit List Price minus any automatic Adjustments.
Extended Price	Read-only field	View the total price of the line item after the price has been adjusted (equal to the unit price multiplied by the quantity).
Category	LOV field	This field is governed by the Order Type field on the Payment tab. If the Order Type is Mixed, you can use Trade-ins. If the Order Type is Standard, this field defaults to Order. This field is enabled only if the profile option ASO: Enable Line Type is set to Yes.

Table A–2 Item View Tab UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Line	LOV field	Select the line type for an item. The list displayed by the LOV depends upon the value of the Category field and the Order Type. This field is enabled only if the profile option ASO: Enable Line Type is set to Yes.
Flexfield box	Flexfield LOV	Use this box to enter additional customized information. This use of this field is defined by your system administrator.
Configure	Button	Click to configure a model item. You must add your model item to the quote and save the quote before using this button.
Related Items	Button	Click to view related items for the current item. This button is enabled only if the current item has related items. There are three types of related items: substitute, an item you can substitute for one that is not available (replaces current item in the quote); cross-sell, an item you can sell as an addition to the item currently on display (an addition to the quote); and up-sell, a more expensive item that you can substitute for the current item (replaces current item in quote). Relationship types are set up in Inventory.
View Warranty	Button	Click to view included warranties for the current item. This button is enabled only if the current item is serviceable.
Clear	Button	Click to clear item data from the field if you do not want to use it and the item has not yet been added to the quote.
Remove	Button	Click to remove the item from the quote.
Add To Quote	Button	Click to add the item to the quote. Add to Quote also calls the Pricing engine and recalculates the price.

See Also:

- Section A.1, "Quoting Form"
- Section A.3, "Quote Lines View Tab"
- Section A.4, "Bill To Tab"
- Section A.5, "Ship To Tab"

- Section A.6, "Payment Tab"
- Section 2.5, "Selecting an Item in the Item View Tab"
- Section 2.7, "Adding Items to the Quote"
- Section 2.16, "Scrolling Through the Items in the Quote"
- Section 2.26, "Adjusting the Price of an Item in a Quote"
- Section 2.28, "Manual Adjustments"

A.3 Quote Lines View Tab

Use the Quote Lines View tab to view the items that you have already included in the current quote.

The following table describes the user interface objects on the Quote Lines View tab of the Quoting form.

Table A–3 Quote Lines View Tab UI Reference

UI Object Name	Type	Description/Usage
Line Item #	Column heading	Displays the position of the line in the quote.
Item ID	Column heading	Displays the ID of the item from Oracle Inventory.
Description	Column heading	Displays the description of the item from Oracle Inventory.
Qty	Column heading	Displays the quantity of the item in this quote line.
UOM	Column heading	Displays the unit of measure chosen for the item in this quote line.
Line Quote Price	Column heading	Displays the total price of the line item before any applicable discounts, based on the price list.
Adjustment	Column heading	Displays the total adjustments (or discounts) for the line item, based on the price list.

See Also:

- Section A.1, "Quoting Form"
- Section A.2, "Item View Tab"

- Section A.4, "Bill To Tab"
- Section A.5, "Ship To Tab"
- Section A.6, "Payment Tab"
- Section 2.7, "Adding Items to the Quote"

A.4 Bill To Tab

Use the Bill To tab to specify the bill-to details for the quote. You must enter billing details before you can place the order.

> **Note:** Once the sold-to information is entered into the header of the quote, the bill-to customer and account defaults from that sold-to customer. If the sold-to customer is changed, the bill-to customer details are automatically updated with the new customer information.

The following table describes the user interface objects on the Bill To tab of the Quoting form.

Table A–4 Bill To Tab UI Reference

UI Object Name	Type	Description/Usage
Customer Type	Drop-down list	This field is automatically populated based on the profile value of ASO: Default Customer Type. Use the LOV button to change the party type of the sold-to customer. The customer can be of party type Person or Organization.

Table A–4 Bill To Tab UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Customer	LOV field	Once the sold-to customer is entered into the header, the sold-to customer information automatically defaults into the Bill To tab. Use this field to enter a different/separate bill-to customer. This field is dependant upon the value entered into the bill-to Customer Type field. If the customer type is organization, the LOV displays all parties of type organization, with or without accounts, depending on the application setting. If the customer type is person, the LOV displays all parties of type person, with or without accounts depending on the application setting. If you select a bill-to customer with an account, the account number should be automatically entered into the Account Field. If you select a bill-to customer without an account, one should be created when the user tabs out of the customer field. **Note:** The behavior of this field depends on the setting of the profile option ASO: Create Customer Account. If the profile is set to Yes, an account is created for the customer if one does not already exist. A relationship is also created between the sold-to customer and bill-to customer. If the profile is set to No, a customer account must exist in order to create a quote. An existing relationship with the sold-to customer is also necessary.
Account	LOV text field	Select the bill-to account number. The LOV displays a list of accounts belonging to the bill-to customer. If the bill-to Customer field is blank and the profile option ASO: Create Customer Account is set to Yes, the LOV displays all active accounts. If ASO: Create Customer Account is set to No, the LOV shows only active accounts with a relationship to the sold to account. **Note:** The behavior of this field depends on the setting of the profile option ASO: Create Customer Account. If the profile is set to Yes and the account is defaulted into the Account field when the customer is selected. If the profile is set to yes and the customer does not have an active account, one is created for them. If the profile is set to No, a customer account is mandatory for creating a quote and there must be a relationship to the sold-to account.

Table A–4 Bill To Tab UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Contact	LOV text field	Select the bill-to contact, i.e. the person who should be contacted regarding any billing issues. The LOV displays any party of type person that has a relationship with the bill-to Customer. This is an optional field.
Address	LOV field	Select the billing address for the quote. The LOV displays all billing addresses for both the bill-to contact, if one exists, and the bill-to customer.
Oval button	Button	Click to open the Address Detail window for the billing address.
City	Read-only field	This field is automatically populated with the billing address city when you choose a billing address from the Address LOV.
State	Read-only field	This field is automatically populated with the billing address state, if applicable, when you choose a billing address from the Address LOV.
Postal Code	Read-only field	This field is automatically populated with the billing address postal code when you choose a billing address from the Address LOV.
Ship to Same Address	Checkbox	Check to ship the order to the billing address. The bill-to information from all fields defaults into the Ship To tab.
County	Read-only field	This field is automatically populated with the billing address county, if applicable, when you choose a billing address from the Address LOV.
Province	Read-only field	This field is automatically populated with the billing address province, if applicable, when you choose a billing address from the Address LOV.
Country	Read-only field	This field is automatically populated with the billing address country when you choose a billing address from the Address LOV.

See Also:

- Section A.1, "Quoting Form"
- Section A.2, "Item View Tab"
- Section A.3, "Quote Lines View Tab"

- Section A.5, "Ship To Tab"
- Section A.6, "Payment Tab"
- Section 2.11, "Entering Bill-To Information"
- Section 2.45, "Placing an Order"

A.5 Ship To Tab

Use the Ship To tab to choose the ship-to details for the current quote. If you do not enter any information in this tab, Oracle Order Management uses the bill-to details as the ship-to details when it receives the order from Quoting.

Note: Once the sold-to information is entered into the header of the quote, the ship-to customer and account defaults from that sold-to customer. If the sold-to customer is changed, the ship-to customer details are automatically updated with the new customer information.

The following table describes the user interface objects on the Ship To tab of the Quoting form.

Table A–5 Ship To Tab UI Reference

UI Object Name	Type	Description/Usage
Customer Type	Drop down list	This field is automatically populated based on the profile value of ASO: Default Customer Type. Use the LOV to change the party type of the sold-to customer. The customer can be of party type Person or Organization.

Table A–5 Ship To Tab UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Customer	LOV text field	Once the sold-to customer is entered into the header, the sold-to customer information automatically defaults into the ship-to tab. Use this field to enter a different ship-to customer. This field is dependent upon the value entered into the ship-to Customer Type field. If the customer type is organization, the LOV displays all parties of type organization, with or without accounts, depending on the profile option setting. If the customer type is person, the LOV displays all parties of type person, with or without accounts depending on the profile option setting. If the user selects a ship-to customer with an account, the account number should be automatically entered into the Account field. If the user selects a ship-to customer without an account, one should be created when the user tabs out of the Customer field. **Note:** The behavior of this field depends on the setting of the profile option ASO: Create Customer Account. If the profile is set to Yes, an account is created for the customer if one does not already exist and a relationship with the sold-to customer is created. If the profile is set to No, a customer account and a relationship with the sold-to customer must exist in order to create a quote.
Account	LOV text field	Select the ship-to account number. The LOV displays a list of accounts belonging to the ship-to customer. If the ship-to Customer field is blank and the profile option ASO: Create Customer Account is set to Yes, the LOV displays all active accounts. If ASO: Create Customer Account is set to No, the LOV shows only active accounts with a relationship to the sold-to account. **Note:** The behavior of this field depends on the setting of the profile option ASO: Create Customer Account. If the profile is set to Yes and the account is defaulted into the Account field when the customer is selected. If the profile is set to Yes and the customer does not have an active account, one is created for them. If the profile is set to No, a customer account is mandatory for creating a quote and there must be a relationship to the sold-to account.

Table A–5 Ship To Tab UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Contact	LOV text field	Select the ship-to contact, i.e. the person who should be contacted regarding any shipping issues. The LOV displays any party of type person that has a relationship with the ship-to customer. This is an optional field.
Address	LOV field	Select the shipping address for the quote. The LOV displays all shipping addresses for both the ship-to contact (if one exists) and the ship-to customer.
Oval Button	Button	Click to open the Address Detail (Ship To) window for the shipping address.
City	Read-only field	This field is automatically populated with the shipping address city when you choose a shipping address from the Address LOV.
State	Read-only field	This field is automatically populated with the shipping address state, if applicable, when you choose a shipping address from the Address LOV.
Postal Code	Read-only field	This field is automatically populated with the shipping address postal code when you choose a shipping address from the Address LOV.
County	Read-only field	This field is automatically populated with the shipping address county, if applicable, when you choose a shipping address from the Address LOV.
Province	Read-only field	This field is automatically populated with the shipping address province, if applicable, when you choose a shipping address from the Address LOV.
Country	Read-only field	This field is automatically populated with the shipping address country when you choose a shipping address from the Address LOV.
Ship Method	Drop-down list	Select the shipping method for the products.
Instructions	Button	Click to enter order level shipping and packing instructions.

See also:

- Section A.1, "Quoting Form"
- Section A.2, "Item View Tab"

- Section A.3, "Quote Lines View Tab"
- Section A.4, "Bill To Tab"
- Section A.6, "Payment Tab"
- Section 2.12, "Entering Ship-To Information"
- Section 2.13, "Splitting Shipments"
- Section 2.45, "Placing an Order"

A.6 Payment Tab

Use the Payment tab to enter payment information for the current quote. If you do not enter any information in this tab, Oracle Order Management enters default payment information once it receives the order from Quoting. If you enter information into a Payment tab field, you must also enter the other required payment information before you can submit the order.

The following table describes the user interface objects on the Payment tab of the Quoting form.

Table A–6 Payment Tab UI Reference

UI Object Name	Type	Description/Usage
Price List	LOV text field	Designate a header level price list (a price list for the entire quote). This price list is only valid for the quote if the user chooses it before adding items.
Order Type	LOV field	Order Type is automatically populated based on the setting of the profile option ASO: Default Order Type. Use the LOV to change the order type. Order Types are defined in Order Management.
Agreement	LOV field	Select an agreement, if one exists. When you choose an Agreement, the Payment Terms and header level Price List fields are automatically populated. Agreements must be set up in the Pricing engine. This is an optional field.
Payment Term	LOV field	Select the payment terms for the order.
Payment Type	Drop down list	Select one of the four payment types: Cash, Check, Credit Card, or Purchase Order. Choosing a payment type here activates the Payment tab fields required by the given payment type.

Table A–6 Payment Tab UI Reference (Cont.)

UI Object Name	Type	Description/Usage
Credit Card	Drop down list	Select a credit card type. This menu is active only if Payment Type is set to Credit Card.
Holder Name	Text field	Enter the name of the person who owns the credit card to which the order will be charged. This field is active only if Payment Type is set to Credit Card.
Number	Text field	This field is dependent upon the value entered in the Payment Type field. This field is active only if Payment Type is set to Credit Card, Check, or Purchase Order. Enter either the credit card number to which the order will be charged, the check number, or the purchase order number in this field.
Exp Date	Text field	This field is active only if Payment Type is set to Credit Card. Enter the expiration date of the credit card to which the order will be charged.
Approval Code	Read-only field	Oracle iPayment fills in this field when the order is placed and the credit card is approved, if Payment Type is set to Credit Card. Otherwise, this field is not active.
Approval Date	Read-only field	Oracle iPayment fills in this field when the order is placed and the credit card is approved, if Payment Type is set to Credit Card. Otherwise, this field is not active.

See also:

- Section A.1, "Quoting Form"
- Section A.2, "Item View Tab"
- Section A.3, "Quote Lines View Tab"
- Section A.4, "Bill To Tab"
- Section A.5, "Ship To Tab"
- Section 2.2, "Creating a Quote"
- Section 2.9, "Entering Payment Information"
- Section 2.24, "Pricing an Item"

A.7 Other Tab

Use this tab to designate the tax handling information for an order.

The following table describes the user interface objects on the Other tab.

Other Tab UI Reference

UI Object Name	Type	Usage/Description
Tax Handling	LOV field	Select a tax handling option for the current quote. The LOV displays three options: Exempt, Require, or Standard. Select exempt to indicate that the quote is exempt for a normally taxable customer site. Select require to indicate that the quote is taxable for a normally non-taxable ship-to customer. Select standard if the taxation should be based on existing exemption rules.
Exempt Number	LOV text field	Select a tax certificate number from the LOV or enter a new tax certificate number. This field is active only if you select Exempt in the Tax Handling field.
Exempt Reason	Text field	If there is no exempt reason designated for the selected or entered Exempt Number, select a reason from the LOV. If an Exempt Number is selected, the corresponding Exempt Reason automatically populates this field. This field is required if the Tax Handling value is Exempt. This field is active only if you select Exempt in the Tax Handling field.

See Also:

- Section A.1, "Quoting Form"
- Section A.2, "Item View Tab"
- Section A.3, "Quote Lines View Tab"
- Section A.4, "Bill To Tab"
- Section A.5, "Ship To Tab"
- Section A.6, "Payment Tab"
- Section 2.10, "Entering Tax Handling Information"

A.8 Item Attributes Form

Use the Item Attributes form to view information about the item currently displayed in the Item View. Information in the Item Attributes form is read-only and is defined in Oracle Inventory.

The following table describes the user interface objects on the Item Attributes form.

Table A–7 Item Attributes Form UI Reference

UI Object Name	Type	Description/Usage
BOM Item Type	Read-only field	Displays the designated item type in Oracle Bill of Materials.
Inventory User Item Type	Read-only field	Displays the designated item type in Oracle Inventory.
Returnable	Read-only checkbox	Indicates whether the item is returnable. If the box is checked, this item can be used as a trade-in.
Serviceable	Read-only checkbox	Indicates whether the item is serviceable. If the box is checked, services and warranties may apply to this item.
Shippable	Read-only checkbox	Indicates whether the item is shippable. If the box is checked, this item can be shipped.
Support Service	Read-only checkbox	Indicates whether this item is a service. If this box is checked, you must specify the serviceable product for which the service is selected.
OK	Button	Click to return to the main Quoting form.

See Also:

- Section A.2, "Item View Tab"

A.9 Warranties Form

Use the View Warranty button to view a listing of the warranties automatically included with your item.

Included warranties are not shown as line items in the quote because they are automatically bundled with the serviceable item.

The following table describes the user interface objects on the View Warranty form.

Table A–8 Warranties Form UI Reference

UI Object Name	Type	Description/Usage
Service Name	Column Heading	Displays the name of the service item.
Description	Column heading	Displays a short description of the service item.
Duration Quantity	Column heading	Displays the duration of time that the service is valid.
Duration Period	Column heading	Displays the unit of measure for the service duration.
Start Date	Column heading	Displays the date the service becomes effective. This date is an estimate. The actual start date is based on when the item is shipped to the customer.
End Date	Column heading	Displays the end date of the service. This date is an estimate. The actual end date is based on when the item is shipped to the customer.

See also:

- Section 2.18, "Adding a Service to the Quote"
- Section 2.19, "Viewing Warranty Information for an Item"

A.10 Copy Quote Form

Use this menu item from the Tools menu to copy quote information into either a new or revised quote.

The following table describes the user interface objects on the Copy Quote form.

Table A–9 Copy Quote Form UI Reference

UI Object Name	Type	Description/Usage
Copy > Quote Header	Radio button	Select this option to copy the header information of your quote into a new or revised quote (includes all ship-to, bill-to, and payment information).
Lines	Checkbox	Check this box to copy the quote lines.
Notes	Checkbox	Check this box to copy all notes associated with your quote into a new or revised quote.
Attachments	Checkbox	Check this box to copy all attachments associated with your quote into a new or revised quote.
Copy > All Quote Info	Radio button	Select this option to copy all header information, address information, and payment information as well as line item details, notes, and attachments into a revised or a new quote.
Copy to > New Quote	Radio button	Select this option to copy the information selected in the Copy section into a new quote.
Copy to > Revision	Radio button	Select this option to copy the information selected in the Copy section into a new version of the original quote. You cannot create a new version of a quote with Entered or Ordered status.
Quote Number	Read-only field/Text field	This field is disabled unless the profile option ASO: Auto Numbering is set to No and the user selects Copy to > New Quote. You must enter a quote number for the new quote.
OK	Button	Click to apply your changes and return to the main Quoting form, where your new or revised quote is displayed.
Cancel	Button	Click to cancel your changes and return to the main Quoting form.

See also:

- Section 2.2, "Creating a Quote"
- Section 2.38, "Copying a Quote"

A.11 Customer History Form

Use the Customer History menu option, from the Reports menu, to view the history of a specific customer account. The Customer History shows both quotes and orders.

The following table describes the user interface objects on the Customer History form.

Table A–10 Customer History - Main Form UI Reference

UI Object Name	Type	Description/Usage
Customer Type	Read-only field	Displays the customer type of the subject of the Customer History.
Customer	Read-only field	Displays the name of the sold-to customer that is the subject of the Customer History.
Account	LOV field	Displays the sold-to account number associated with the customer that is the subject of the Customer History. You can also use the LOV to choose other accounts for the customer, if any exist. You can also select ALL, to see information for all accounts for the customer. If you choose another account, the screen refreshes with quote and order information for that account.
View Quote	Button	Click to view the quote for the order that is highlighted in the Quote tab of the customer history form. Whether or not you can modify this quote depends on the quote status.
View Order	Button	Click to view the details of an order in the Order Management Sales form. Once the order is displayed in the Order Management form, you can modify it depending on the order status and the setting of the profile option ASO: OM Access. If ASO: OM Access is set to Full, you can modify the order in OM. If ASO: OM Access is set to Read-only, you cannot modify the order.
Cancel	Button	Click to close the Customer History window and return to the Quoting form.

Table A–11 Customer History - Quote Tab UI Reference

UI Object Name	Type	Description/Usage
Quote Name	Column heading	Displays the names of the quotes belonging to the customer displayed in the header of the Customer History form.
Quote Number	Column heading	Displays the quote number for the quote.
Account Number	Column heading	Displays the sold-to account number for the customer displayed in the header of the Customer History form. If the customer has more than one account, you can switch the account number in the header of the Customer History form, or select ALL to see the information for all of the customer's accounts.
Creation Date	Column heading	Displays the creation date for each quote.
Quote Status	Column heading	Displays the status of the quote.
Quote Total	Column heading	Displays the total amount of the quote.
Currency	Column heading	Displays the currency used on the quote.
Quote Expiration	Column heading	Displays the date the quote expires.
Contact Name	Column heading	Displays the name of the sold-to contact for the quote. This field is optional in the Quoting form, so this column may be blank.
Object	Read-only text box	Displays the source or outcome of the quote. For example, a quote is created from an opportunity, or a quote is submitted and becomes an order. When you highlight a quote in the table above, these fields populate with the appropriate information. If a quote does not have any related objects that meet the search criteria, the field should remain blank.
Number	Read-only text box	Displays the object ID number.
Status	Read-only text box	Displays the status of the object in its respective application.

Table A–11 Customer History - Quote Tab UI Reference

UI Object Name	Type	Description/Usage
Relationship	Read-only text box	Displays the relationship of the object to the quote. For example, if the object is opportunity, the relationship is Opportunity to Quote. If the object is order, the relationship is Quote to Order.

Table A–12 Customer History - Order Tab UI Reference

UI Object Name	Type	Description/Usage
Order Number	Column heading	Displays the order number for an order in Order Management. If the order was created from a quote, it is returned as a confirmation number in Quoting, however it is known as the order number.
Order Status	Column heading	Displays the current status of the order in Order Management. There are two statuses in Quoting that you can apply to quotes that are transferred into orders: Booked and Entered, which are defined in the profile option ASO: Default Order State.
Creation Date	Column heading	Displays the date the order was placed.
Order Total	Column heading	Displays the total amount charged for the order. The order total includes adjustments and tax information.
Currency	Column heading	Displays the currency used for the order.
Account Number	Column heading	Displays the account number for the sold-to customer displayed in the Customer History form. If the customer has more than one account, you can choose one of their other accounts in the header Account field, or select ALL to view information for all of the customer’s accounts.
Quote Name	Column heading	Displays the name of the quote from which the order was placed. This field should be blank if the order was not created from a quote.
Quote Number	Column heading	Displays the quote number concatenated with the version number, from which the order was placed. This column should be blank if the order was not created from a quote.

Table A–12 Customer History - Order Tab UI Reference

UI Object Name	Type	Description/Usage
Contact Name	Column heading	Displays the name of the sold-to contact for the order. This contact field is optional in the Quoting form and this column should therefore remain blank if a contact does not exist.

See also:

- Section 2.41, "Viewing the History of a Quote"
- Section 2.42, "Viewing Customer Quotes"
- Section 2.43, "Modifying a Customer Quote"
- Section 2.44, "Viewing the Order History for a Customer"

A.12 Quote History Form

Use the Quote History menu option, from the Reports menu, to view the history of a quote.

The following table describes the user interface objects on the Quote History form.

Table A–13 Quote History Form UI Reference

UI Object Name	Type	Description/Usage
First Name	Read-only field	If the customer type is person, this field displays the first name of the sold-to customer the quote was created for. If the customer type is organization and there is a sold-to contact designated, this field displays the first name of the contact.
Last Name	Read-only field	If the customer type is person, this field displays the last name of the sold-to customer the quote was created for. If the customer type is organization and a sold-to contact is designated, this field displays the last name of the contact.
Phone	Read-only field	Displays the customer’s phone number.
Organization	Read-only field	Displays the organization the quote was created for, if the customer type is Organization.
Quote Number	Read-only field	Displays the quote number.

Table A–13 Quote History Form UI Reference

UI Object Name	Type	Description/Usage
Version	Column heading	Displays the version number of the quote.
Date	Column heading	Displays the date a change was applied to the quote.
Agent	Column heading	Displays the name of the person who made the change.
Status	Column heading	Displays the status of the quote.
Amount	Column heading	Displays the total amount for the quote.
OK	Button	Click to close the Quote History window.

See also:

- Section 2.41, "Viewing the History of a Quote"
- Section 2.42, "Viewing Customer Quotes"

A.13 Check Availability Form

Use the Check Availability form, from the Actions menu, to check when items will be available.

The following table describes the user interface objects on the Check Availability form.

Table A–14 Availability Form UI Reference

UI Object Name	Type	Description/Usage
Item	Read-only field	Displays the item number for the item currently in the Item View tab.
Description	Read-only field	Displays a description of the item (item name) currently displayed in the Item View tab.
UOM	Read-only field	Displays the UOM for the item currently displayed in the Item View tab.
Requested Date	Read-only field	Displays the date the item was requested.

Table A–14 Availability Form UI Reference

UI Object Name	Type	Description/Usage
Available Date	Read-only field	Displays the date the entire desired quantity will be available.
Requested Qty	Read-only field	Displays the quantity of the item requested by the customer.
Available Qty	Read-only field	Displays the quantity available to the customer on the requested date.
Item ATP Message	Read-only field	Displays the message generated from Inventory.
OK	Button	Click to close the ATP window and return to the Quoting form.

See also:

- Section 2.23, "Finding Out When an Item Will Be Available"

A.14 Promotions Form

Use the Promotions menu option, from the Actions menu, to select an ask for promotion to apply to an item or a quote.

The following table describes the user interface objects on the Promotions form.

Table A–15 Promotions Form UI Reference

UI Object Name	Type	Description/Usage
Level	Read-only field	Displays the level at which the promotion is applied. The values, which are designated in Pricing, are order or line. If the level of the promotion is order, the promotion applies to all lines in the quote. If the level is line, the promotion applies to the line item displayed in the Item View.
Promotion No	LOV field	Displays the modifier number for the promotion. This value is defined in Pricing.
Promotion Name	Read-only field	Displays the promotion name associated with the promotion number. A value is defaulted into this field when the promotion number is entered. This value is defined in Pricing.

Table A–15 Promotions Form UI Reference

UI Object Name	Type	Description/Usage
List Line	LOV field	Displays the individual list line number of the specific promotion. This value is defined in Pricing.
Date From	Read-only field	Displays the starting date of the promotion, if one exists. This field is only populated when there is a finite period of time that the promotion is valid. This value is defined in Pricing.
Date To	Read-only field	Displays the ending date for a promotion. This field is only populated when there is a finite period of time that the promotion is valid. This value is defined in Pricing.
Override Flag	Read-only Check box	If this box is checked, the amount of the promotion can be overridden. If it is not checked, the amount cannot be overridden. Overrides are not supported on an individual promotion level. They are only supported through manual overrides. This flag is set in Pricing.
Cancel	Button	Click to cancel the promotion selection in progress and return to the Quoting form.
Apply	Button	Click to apply the promotion selected in the Promotions form to the quote.

See also:

- Section 2.26, "Adjusting the Price of an Item in a Quote"
- Section 2.27, "Adjusting Prices for a Whole Quote"
- Section 2.29, "Viewing Adjustments"

A.15 Sales Credits

Use the Sales Credits menu option, from the Actions menu, to allocate sales credits to sales representatives. You can allocate sales credits either at the header or line level. If your cursor is in the header and you select Sales Credits, the header sales credit form displays. If your cursor is in an Item View field, the line level sales credit form appears.

The following tables describe the user interface objects on the Sales Credit forms.

Table A–16 Header Sales Credits UI Reference

UI Object Name	Type	Description/Usage
Quote Number	Read-only field	Displays the number of the current quote.
Customer Type	Read-only field	Displays the customer type of the sold-to customer on the current quote.
Customer	Read-only field	Displays the sold-to customer on the current quote.
Contact	Read-only field	Displays the sold-to contact on the current quote.
Account	Read-only field	Displays the sold-to account for the current quote.
Salesperson	LOV field	Select a salesperson to whom you wish to allocate a sales credit. The LOV displays only salespeople who are set up as valid salesreps.
Type	LOV field	Select the type of sales credit to allocate. A sales credit can either be a Quota Sales Credit or a Non-Quota Sales Credit. A quota sales credit is based on invoice lines and is applied against a salesperson's quota. A non-quota sales credit is not associated with invoice lines and is not usually applied to a sales representative's quota. These types are set up in Order Management.
Percent	LOV field	Select the percentage of the sales credit.
Revenue Total	Read-only field	If the type is Quota Sales Credit, this field must add up to either 0% or 100%.
Non-Revenue Total	Read-only field	If the type is Non-Quota Sales Credit, this field can contain any amount.
OK	Button	Click to apply the sales credit(s) and return to the main Quoting form.
Cancel	Button	Click to cancel any changes and return to the main Quoting form.

Table A–17 Line Sales Credit UI Reference

UI Object Name	Type	Description/Usage
Line	Read-only field	Displays the line item number for which the sales credit is being applied.
Item	Read-only field	Displays the name and number of the item for which the sales credit is being applied.
Salesperson	LOV field	Select a salesperson to whom you wish to allocate a sales credit. The LOV displays only salespeople who are set up as valid salesreps. If no sales credits are selected for line items, Quoting will use the header level sales credits.
Type	LOV field	Select the type of sales credit to allocate. A sales credit can either be a Quota Sales Credit or a Non-Quota Sales Credit. A quota sales credit is based on invoice lines and is applied against a salesperson's quota. A non-quota sales credit is not associated with invoice lines and is not usually applied to a sales representative's quota. These types are set up in Order Management.
Percent	Text field	Select the percentage of the sales credit.
Revenue Total	Read-only field	If the type is Quota Sales Credit, this field must equal either 0% or 100%.
Non-Revenue Total	Read-only field	If the type is Non-Quota Sales Credit, this field can contain any amount.
OK	Button	Click to apply the sales credit(s) and return to the main Quoting form.
Cancel	Button	Click to cancel any changes and return to the main Quoting form.

See also:

- Section 2.30, "Allocating a Sales Credit"

A.16 Related Items Form

Use the Related Items menu option, from the Actions menu, to cross-sell, up-sell, or substitute an item.

The following table describes the user interface objects on the Related Items form.

Table A–18 Related Items Form UI Reference

UI Object Name	Type	Description/Usage
Item	Read-only field	Displays the number and name of the original item that has related items.
Unit Price	Read-only field	Displays the unit price of the original item.
Item ID	Column heading	Displays the identification number for the related item.
Item Description	Column heading	Displays the name of the related item.
Type	Column heading	Displays the related item type. There are three types of related items: substitute, an item you can substitute for one that is not available; cross-sell, an item you can sell as an addition to the item currently on display; and up-sell, a more expensive item that you can substitute for the current item.
Available Qty	Column heading	Displays the available quantity of the related item. This field only functions if ATP is set up.
UOM	Column heading	Displays the UOM for the related item.
Item	Read-only field	When you highlight an item in the table above, the item name and number display in this field. This field displays the selected related item.
Qty	Read-only field	When you highlight an item in the table above, the item's quantity displays in this field.
UOM	Read-only field	When you highlight an item in the table above, the item's UOM displays in this field.
OK	Button	Click to save your changes and return to the main Quoting window. The selected related item displays in the Item View, yet you must still add it to your cart.
Cancel	Button	Click to cancel your changes and return to the main Quoting form.

See also:

- Section 2.7, "Adding Items to the Quote"
- Section 2.22, "Cross-Selling, Up-Selling, and Substituting Items"

A.17 Split Shipping Form

Use the Split Shipping menu option, from the Actions menu, to ship part of a quantity of items to another location.

The following table describes the user interface objects on the Split Shipping form.

Table A–19 Split Shipping Form UI Reference

UI Object Name	Type	Description/Usage
Item > Total Quantity	Read-only field	Displays the total quantity of the line item for which you want to split the shipping.
Item > Item	Read-only field	Displays the number and name of the item for which you want to split the shipping.
UOM	Read-only field	Displays the UOM for the item for which you want to split the shipping.
Current Shipping > Quantity	Read-only field	Displays the quantity that is being shipped to the current address. This value decreases as split shipments are applied. For example, if the total quantity is 10 and the customer wants to ship 3 to another office, the number in this field decreases to 7.
Current Shipping > Customer Type	Read-only field	Displays the customer type.
Current Shipping > Customer	Read-only field	Displays the ship-to customer.
Current Shipping > Account	Read-only field	Displays the account number.
Current Shipping > Contact	Read-only field	Displays the contact.
Current Shipping > Address	Read-only field	Displays the address.
Current Shipping > Oval Button	Button	Displays the address details.

Table A–19 Split Shipping Form UI Reference

UI Object Name	Type	Description/Usage
Current Shipping > City	Read-only field	Displays the city.
Current Shipping > State	Read-only field	Displays the state.
Current Shipping > Postal Code	Read-only field	Displays the postal code.
Current Shipping > County	Read-only field	Displays the county.
Current Shipping > Province	Read-only field	Displays the province.
Current Shipping > Country	Read-only field	Displays the country.
Current Shipping > Ship Method	Read-only field	Displays the ship method.
Current Shipping > Instructions	Button	Click to view the shipping and packing instructions for the current shipment. The fields in the instructions form are read-only.
Current Shipping > Shipping	Read-only field	Displays the calculated shipping charges for the current shipment.
Current Shipping > Tax	Read-only field	Displays the tax amount for the current shipment.
Quantity	Column heading	Displays the quantity to be shipped to a particular split shipment address. This column is populated when information in the fields below is applied. If you highlight a row in the table, the information automatically populates the split shipping fields below. You can then make changes and re-apply the split shipment.
Address	Column heading	Displays the address to which the split shipment will be sent. This column is populated when information in the fields below is applied. If you highlight a row in the table, the information automatically populates the split shipping fields below. You can then make changes and re-apply the split shipment.

Table A–19 Split Shipping Form UI Reference

UI Object Name	Type	Description/Usage
City	Column heading	Displays the city to which the split shipment will be sent. This column is populated when information in the fields below is applied.
State	Column heading	Displays the state to which the split shipment will be sent. This column is populated when information in the fields below is applied.
Ship Method	Column heading	Displays the ship method for the split shipment. This column is populated when information in the fields below is applied.
Shipping Cost	Column heading	Displays the shipping cost for the split shipment. This column is populated when information in the fields below is applied.
Quantity	Text field	Enter the quantity allocated to the new shipping address.
Customer Type	Drop-down list	Select a customer type for the new ship-to customer details. The customer can be of type person or organization.
Customer	LOV field	Select the name of the ship-to customer associated with the new shipping address. This field is limited by the customer type.
Account	LOV field	Select the ship-to customer's account number for the new shipping address. This field is limited by the customer field.
Contact	LOV field	Select a contact for the new shipping address. The LOV displays all parties related to the ship-to customer.
Address	LOV field	Select the new shipping address.
City	Read-only field	This field is automatically populated with the city when you choose an address from the Address LOV.
State	Read-only field	This field is automatically populated with the state, if applicable, when you choose an address from the Address LOV.
Postal Code	Read-only field	This field is automatically populated with the postal code when you choose an address from the Address LOV.

Table A–19 Split Shipping Form UI Reference

UI Object Name	Type	Description/Usage
County	Read-only field	This field is automatically populated with the county, if applicable, when you choose an address from the Address LOV.
Province	Read-only field	This field is automatically populated with the province, if applicable, when you choose an address from the Address LOV.
Country	Read-only field	This field is automatically populated with the country when you choose an address from the Address LOV.
Ship Method	LOV field	Select the ship method for the new shipping address.
Instructions	Button	Click to enter shipping and packing instructions for the new shipping address in the forms window.
Shipping	Read-only field	Displays the calculated shipping charges for the new shipping address.
Tax	Read-only field	Displays the tax amount for the new shipping address.
Apply	Button	Click to post the new shipping address as a split shipment. Once you click the apply button, the new shipping address is displayed in the Split Shipping table. You can also use this button to apply changes made to the selected shipping record in the split shipping table.
New	Button	Click to create a new shipping address. This button is inactive until you specify one new address.
Remove	Button	Click to remove the currently selected shipping address. This button is inactive until you specify one new address.
OK	Button	Click to commit all changes and return to the main Quoting form.
Cancel	Button	Click to cancel changes and return to the main Quoting form.

See also:

- Section 2.12, "Entering Ship-To Information"
- Section 2.13, "Splitting Shipments"

A.18 Service Reference Form

Use the Service Reference menu option, from the Actions menu, to service reference details for a service item.

The following table describes the user interface objects on the Service Reference form.

Table A–20 Service Reference Form UI Reference

UI Object Name	Type	Description/Usage
Service For	LOV field	Select the object to which the service is applied. The service can apply to an item on either a quote, order, or customer product (already installed at a customer site).
Coterminate	Checkbox	Check this box to match the end date for your customer's new service with the end dates for their existing services. Therefore, they can renew all services for their system at the same time. This box is used when your customer is purchasing a service for an item in Installed Base.
Installed Product	LOV text field	This field is only enabled if the Service For value is customer product. Use this LOV to enter the product for which the service applies.
System Name	LOV text field	This field is only enabled if the Service For value is customer product. Use the LOV to enter the system name. System names are groupings of related products that are defined and maintained in Installed Base.
Qty	Read-only field	Displays the quantity of the service item.
UOM	Read-only field	Displays the UOM of the service item.

Table A–20 Service Reference Form UI Reference

UI Object Name	Type	Description/Usage
Reference Number	LOV text field	Select the reference number. This field is dependent on the value of the Service For field. If the Service For value is Quote, use the LOV to select the quote number and line number of the item. The field displays a concatenation of the quote number and the line number. If the Service For value is Order, use the LOV to select the order number and line number for the item. The field displays a concatenation of the order number and the line number. If the Service For value is Customer Product, this field is disabled.
Serial Number	Text field	This field is used only if the Service For value is Customer Product. Enter the serial number of the installed product in this field.
Transaction Reason	Text field	Enter a transaction reason. This field is optional.
OK	Button	Click to apply your changes and return to the main Quoting form.
Cancel	Button	Click to cancel changes and return to the main Quoting form.

See also:

- Section 2.18, "Adding a Service to the Quote"

A.19 Price Adjustment Form

Use the Price Adjustments menu option, from the Actions menu, to view the price adjustments that apply to the items in your quote. If your cursor is in the header section when you select the Price Adjustment menu option, the header level Price Adjustments form displays. If your cursor is in the Item View tab when you select the Price Adjustments menu option, the line level Price Adjustments form displays.

The following tables describes the user interface objects on the Price Adjustment forms.

Table A–21 Price Adjustment - Header Level UI Reference

UI Object Name	Type	Description/Usage
Customer Type	Read-only field	Displays the customer type of the sold-to customer designated for the current quote. This information is defaulted from the Quoting form.
Customer	Read-only field	Displays the sold-to customer designated for the current quote. This information is defaulted from the Quoting form.
Contact	Read-only field	Displays the sold-to contact for the customer designated for the current quote. This information is defaulted from the Quoting form.
Account	Read-only field	Displays the sold-to account for the customer designated on the current quote. This information is defaulted from the Quoting form.
Quote Number	Read-only field	Displays the quote number for the current quote. This information is defaulted from the Quoting form.
Quote Name	Read-only field	Displays the name of the current quote. This information is defaulted from the Quoting form.
Currency	Read-only field	Displays the designated currency for the current quote. This information is defaulted from the Quoting form.
Modifier Num	Read-only field	Displays the modifier number for the price adjustment. This value is defaulted in from Pricing.
Modifier Type	Read-only field	Displays the modifier type of the price adjustment. This value is defaulted in from Pricing. Quoting supports the following modifier types: discounts, surcharges, and price breaks.

Table A–21 Price Adjustment - Header Level UI Reference

UI Object Name	Type	Description/Usage
Application Method	Read-only field	Displays the application method for the price adjustment. The value can be either % or amt. For example, if the application method is % and the value is 10, there is a 10% discount applied to the item or order. If the application method is amt and the value is 10, there is a $10 discount applied to the item or order.
Value	Read-only field	Displays the adjustment amount or percent.
Automatic	Read-only field	Indicates whether the price adjustment is automatically applied or not. If the box is checked, adjustments apply whenever the adjustment criteria is met. If the box is not checked, this is a promotion applied manually via the Promotions form. This flag is set depending on whether the adjustment is "Automatic" or "Ask for" in the Pricing engine.
Apply	Read-only field	Indicates whether the price adjustment is currently impacting the price in Quoting. If the box is checked, the adjustment is currently affecting the price. If the box is not checked, the adjustment is not currently affecting the price.
Modifier Description	Read-only field	Displays the description of the modifier. The description is defined in Pricing.
OK	Button	Click to return to the Quoting form.
Cancel	Button	Click to return to the Quoting form.

Table A–22 Price Adjustments - Line Level UI Reference

UI Object Name	Type	Description/Usage
Item	Read-only field	Displays the number and name of the item currently listed in the Item View tab.
Qty	Read-only field	Displays the quantity of the item currently listed in the Item View tab.
UOM	Read-only field	Displays the UOM for the item currently listed in the Item View tab.
Currency	Read-only field	Displays the default currency for the item currently listed in the Item View tab.

Table A–22 Price Adjustments - Line Level UI Reference

UI Object Name	Type	Description/Usage
Unit List Price	Read-only field	Displays the unit list price of the item currently listed in the Item View tab.
Total List Price	Read-only field	Displays the total list price for the item based on the quantity listed in the Item View tab.
Unit Adjustment	Read-only field	Displays the adjustment per unit.
Total Adjustment	Read-only field	Displays the total adjustment for the item based on the quantity.
Unit Net Price	Read-only field	Displays the net price per unit of the item currently listed in the Item View tab.
Extended Price	Read-only field	Displays the total price of the item after adjustment.
Modifier Number	Column heading	Displays the modifier number for the price adjustment. This value is defaulted in from Pricing.
Modifier Type	Column heading	Displays the modifier type of the price adjustment. This value is defaulted in from Pricing. Quoting supports the following modifier types: discounts, surcharges, freight/special charges, and price breaks.
Application Method	Read-only field	Displays the application method for the price adjustment. The value can be either % or amt. For example, if the application method is % and the value is 10, there is a 10% discount applied to the item or order. If the application method is amt and the value is 10, there is a $10 discount applied to the item or order.
Value	Read-only field	Displays the adjustment amount or percent.
Automatic	Read-only field	Indicates whether the price adjustment is automatically applied or not. If the box is checked, adjustments apply whenever the adjustment criteria is met. If the box is not checked, this is a promotion applied manually via the Promotions form. This flag is set in Pricing.
Apply	Read-only field	Indicates whether the price adjustment is currently impacting the price in Quoting. If the box is checked, the adjustment is currently affecting the price. If the box is not checked, the adjustment is not currently affecting the price.

Table A–22 Price Adjustments - Line Level UI Reference

UI Object Name	Type	Description/Usage
Modifier Description	Read-only field	Displays the description of the modifier. The description is defined in Pricing.
OK	Button	Click to return to the Quoting form.
Cancel	Button	Click to return to the Quoting form.

See also:

- Section 2.26, "Adjusting the Price of an Item in a Quote"
- Section 2.27, "Adjusting Prices for a Whole Quote"
- Section 2.28, "Manual Adjustments"
- Section 2.29, "Viewing Adjustments"

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. An API defines a contract to its users by guaranteeing a published interface but hides its implementation details.

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.

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.

BOM item type

An item classification that determines the items you can use as components in a bill of material. BOM Item types include standard, model, option class, and planning items.

contact

A contact is an individual that represents an organization.

cross-sell

A cross-sell item is an item that you can sell as an addition to an item in your quote.

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.

discount

Reduces the price by a fixed amount or percentage or provides a new price.

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.

inactive

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

item attribute

A feature associated with a particular item type, also known as an item attribute. An item type attribute is defined as a variable whose value can be looked up and set by the application that maintains the item. An item type attribute and its value is available to all activities in a process.

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.

non-quota sales credit

See non-revenue sales credit.

non-revenue sales credit

Sales credit you assign to your salespeople not associated with your invoice lines. This is sales credit given in excess of your revenue sales credit.

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.

order type

An Order Transaction Type can be for any of the following Order Categories: 'ORDER', 'RETURN' or 'MIXED'. Line Transaction Types can be for any of t he categories: 'ORDER' or 'RETURN'. When an Order is created with a particular Transaction Type, the Order Category code determines which lines are permitted for that order. If the category code is 'ORDER', then the order can have only regular Lines. If the category code is 'RETURN', then the order can have only return lines. If the category code is 'MIXED', then the order can have both kinds of lines.

price list

Price lists contain prices and currencies associated with products and services.

quota sales credits

See revenue sales credit, non-revenue sales credit.

quote

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

quote number

Oracle Order Capture automatically assigns a quote number to the quote. The quote number is composed of the quote number itself and a version number that increments each time a new quote version is created.

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 version

The quote version, which is part of the quote number, indicates the latest version of the quote. The version increments when the status of the quote is changed or if the quote is copied into a revision.

related items

An acceptable substitute you define for an item so that you may receive the item if your supplier cannot ship the original item on the purchase order.

resources

Anything of value, except material and cash, required to manufacture, cost, and schedule products. Resources include people, tools, machines, labor purchased from a supplier, and physical space.

returnable

An item attribute indicating that an item can used for a trade-in.

revenue sales credit

Sales credit you assign to your salespeople that is based on your invoice lines. The total percentage of all revenue sales credit must be equal to 100% of your invoice lines amount. Also known as quota sales credits. See non-revenue sales credit, sales credit.

role

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

role types

A collection of roles associated with a particular CRM module.

serviceable

An item attribute indicating that a service can be associated with the item.

service reference

A form that links a service to its associated serviceable item.

shippable

An item attribute indicating that the item can be shipped.

ship-to customer

The name and financial account information of the customer to whom the goods or services are delivered.

shopping cart

A collection of items that a customer selects for purchase in an Oracle iStore 11i Web store. In the context of the quote creator, the shopping cart is referred to as a quote.

sold-to customer

The name and financial account of the customer. The sold-to customer is financially responsible for the order.

substitute

A substitute item is an item you can substitute for one that is not currently available.

surcharge

Increases the price by a fixed amount or percentage or provides a new price.

tax exempt

A customer, business purpose, or item to which tax charges do not apply.

trade-in

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

UI

Acronym for user interface.

up-sell

An up-sell item is a more expensive model that you can substitute for an item in your quote.

wildcard

A special character within a search parameter that tells the application to search for all records that are similar to the search parameter. In Oracle Order Capture, % 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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