

Oracle® HTML Quoting

Implementation Guide

Release 11*i*

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ORACLE®

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Contents

Send Us Your Comments	vii
Preface	ix
Audience for This Guide	ix
How To Use This Guide	ix
Typographic Conventions	x
Documentation Accessibility	x
Other Information Sources	xi
Do Not Use Database Tools to Modify Oracle Applications Data	xvi
About Oracle	xvi
1 Introduction	
1.1 Oracle HTML Quoting Overview	1-2
1.1.1 Oracle HTML Quoting Features	1-2
1.2 New in this Release	1-2
2 Technology, Requirements, and Performance	
2.1 Architectural Overview	2-2
2.2 Minimum Software Requirements.....	2-2
2.3 Minimum Hardware Requirements	2-2
3 Dependency Requirements and Verification	
3.1 Mandatory Dependencies	3-2

3.1.1	Oracle iStore	3-2
3.1.2	Oracle Inventory	3-3
3.1.3	Oracle Quoting - Forms	3-4
3.1.3.1	Setting Up Payment Types	3-4
3.1.3.2	Setting Up Quote Status Transitions	3-5
3.1.4	Oracle Order Management and Oracle Pricing	3-5
3.2	Conditional Dependencies	3-6
3.2.1	Oracle Sales Online	3-6
3.3	Installation and Dependency Verification	3-6

4 Implementation Overview

4.1	Process Description	4-2
4.2	Implementation Task Sequence.....	4-2

5 Implementation Tasks

5.1	Creating Oracle HTML Quoting Sales Representatives	5-2
5.1.1	Process Flow for Required Sales Representative Setups	5-2
5.1.2	Defining a Sales Representative Responsibility	5-3
5.1.3	Setting Up Sales Representatives	5-6
5.1.4	Creating an Employee Record.....	5-7
5.1.5	Creating a User Name for a Sales Representative	5-8
5.1.6	Assigning a Sales Representative Role.....	5-10
5.1.7	Importing a CRM Resource	5-11
5.2	Setting Profile Options.....	5-13
5.2.1	Setting Oracle iStore Profile Options.....	5-13
5.2.2	Setting Multi Organization Profile Options	5-14
5.3	Limiting the Available Countries.....	5-15
5.3.1	Limiting Bill-To Countries	5-15
5.3.2	Limiting Ship-To Countries	5-17
5.4	GSA (General Services Administration) Pricing.....	5-18
5.5	Set up Automatic Site Numbering	5-19

6 Verifying the Implementation

6.1	Oracle HTML Quoting Implementation Verification Tasks	6-2
-----	---	-----

7 Diagnostics and Troubleshooting

7.1	Order Feedback Queue Frequently Asked Questions	7-2
-----	---	-----

A Profile Options

A.1	Oracle iStore (IBE) Profile Options	A-2
A.2	Multi Organization (MO) Profile Options	A-4

B Seeded Roles

B.1	The Sales Representative Role and Permissions	B-2
-----	---	-----

Glossary

Index

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Oracle HTML Quoting Implementation Guide, Release 11i

Part No. A92193-01

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

- Did you find any errors?
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Preface

Audience for This Guide

Welcome to Release 11*i* of the *Oracle HTML Quoting Implementation Guide*.

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

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

If you have never used Oracle HTML Quoting, Oracle suggests you attend one or more of the Oracle HTML 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 HTML Quoting*.

- Chapter 1 provides an overview of Oracle HTML Quoting's features and a list of new functionality.
- Chapter 2 describes Oracle HTML Quoting's architecture and lists the minimum software and hardware requirements.

- Chapter 3 lists the mandatory and conditional dependencies of Oracle HTML Quoting.
- Chapter 4 provides an overview of the implementation process.
- Chapter 5 lists the specific tasks involved in the implementation of Oracle HTML Quoting.
- Chapter 6 contains a list of tasks for verifying the implementation.
- Appendix A provides a complete list of the profile options users must set for Oracle HTML Quoting.

Typographic Conventions

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

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

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

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

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

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle HTML 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

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

Oracle HTML Quoting Concepts and Procedures, Release 11i

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

Oracle iStore API Reference Guide, Release 11i

This document provides users with information about the APIs used by Oracle HTML Quoting.

Oracle iStore Implementation Guide, Release 11i

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

Oracle iStore Concepts and Procedures, Release 11i

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

Oracle Inventory User's Guide, Release 11i

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

Oracle Quoting - Forms Implementation Guide, Release 11i

This document provides users with information on implementing Oracle Quoting - Forms, including procedures for setting up quote statuses and status transitions. This document also contains the Oracle Order Capture Foundation APIs used by Oracle HTML Quoting.

Oracle Pricing User's Guide, Release 11i

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

Oracle Sales Online Concepts and Procedures, Release 11i

This document provides information on using Oracle Sales Online, including procedures for using Notes and Tasks.

Oracle Sales Online Implementation Guide, Release 11i

This document provides information on implementing Oracle Sales Online, including procedures for integrating Oracle Sales Online with Oracle HTML Quoting.

Oracle Applications System Administrator's Guide, Release 11i

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

Oracle CRM Foundation Implementation Guide, Release 11i

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

Implementing Oracle CRM: ERP Functional Checklist

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

Implementing Oracle CRM: Foundation Functional Checklist

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

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

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

Other Implementation Documentation

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 Oracle HTML 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 Oracle HTML Quoting working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With OracleMetaLink, you can obtain

information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

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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.

Introduction

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

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

1.1 Oracle HTML Quoting Overview

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

1.1.1 Oracle HTML Quoting Features

Oracle HTML Quoting includes the following key functionality:

- Create and administer quotes
- Configure complex products
- Manually adjust quote prices
- Perform real time global availability checks
- Accept product trade-ins
- Assign sales credits
- Convert quotes to orders

1.2 New in this Release

Oracle HTML Quoting contains the following new functionality in this release:

- General Services Administration (GSA) Pricing

GSA is a customer classification that indicates that the customer is a U.S. government customer. Specific GSA price lists for the customers must be set up in Pricing. Items listed on the GSA price list cannot be sold to commercial customers for the same price or less than the government. You can now enable HTML Quoting to respond to GSA pricing violations.
- Ability to add service items

HTML quoting supports the use of warranties, services included in the purchase of the product, and extended warranties, services that you can purchase in addition to the product, in 11.5.6.

- Ability to multi-select items to add to a quote

From the product search results, you can now multi-select items to add to a quote.

Technology, Requirements, and Performance

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

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

2.1 Architectural Overview

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

- The desktop tier provides the user interface display. In Internet Computing Architecture, only the presentation layer of the application is on this tier, in the form of a plug-in to a standard Internet browser.
- The middle tier, or application tier, manages Oracle applications and other tools.
- The database tier manages the Oracle*8i* database, which provides centralized storage and schema.

HTML-based products, such as Oracle HTML Quoting, rely on HTTP-based servers on the application tier and a Java-enabled Web browser on the desktop.

Oracle HTML Quoting operates by direct connection to the Apache HTTP server. Logic is controlled through stored procedures performed by the PL/SQL cartridge and by Java servlets and JavaServer Pages (JSP), executed by the Apache JServ module. Apache communicates with the database using JDBC (Java Data Base Connectivity).

2.2 Minimum Software Requirements

The following table lists the minimum software requirements for Oracle HTML Quoting:

Table 2-1 *Minimum Software Requirements*

Tier	Software Required
Middle tier/application tier	Apache HTTP Server Apache JServ module Oracle Forms Server
Database tier	Oracle <i>8i</i> Enterprise Edition (8.1.7)

2.3 Minimum Hardware Requirements

The following table lists the minimum hardware requirements for Oracle HTML Quoting implementation.

Table 2–2 Minimum Hardware Requirements for Oracle HTML Quoting

Requirement	Minimum value
CPU	70 users per CPU.
Memory	8 MB per user.
Disk Space	22 GB

Dependency Requirements and Verification

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

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

3.1 Mandatory Dependencies

Oracle HTML Quoting depends on Oracle iStore, Oracle Inventory, Oracle Quoting - Forms, Oracle Order Management, and Oracle Pricing.

3.1.1 Oracle iStore

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

Permissions

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

Specialty Stores

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

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

- Organize products to help your sales representatives find specific products easily
- Restrict which products a given sales representative can sell, by providing access to some specialty stores and restricting access to others.

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

Note: Specialty stores are also called "minisites."

Shopping Cart

The sales representative builds quotes for customers by leveraging the Oracle iStore shopping cart functionality. A shopping cart and a quote are essentially the same. The same object is referred to as a shopping cart with respect to B2B and B2C customers in Oracle iStore, and as a quote with respect to the sales representatives

in Oracle HTML Quoting. See *Oracle iStore Concepts and Procedures* for more information about the Oracle iStore shopping cart.

Profile Options

See [Appendix A, "Profile Options"](#) for more information about the Oracle iStore profile options that you need to set when implementing Oracle HTML Quoting.

3.1.2 Oracle Inventory

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

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

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

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

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

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

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

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

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

Steps

1. Launch Oracle Forms by navigating to:

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

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

2. Log in with the Inventory responsibility.
3. Choose **Items > Master Items**.
The Organizations window opens.
4. In the Organizations window, search for and highlight the organization that has the trade-in item, and click **OK**.
The Master Item form opens.
5. Choose **View > Find**.
The Find Master Items window opens.
6. In the Find Master Items window, enter your search criteria for the trade-in item, and click **Find**.
The Master Items Summary window opens.
7. Highlight the trade-in item and click **Open**.
The Master Item form for the trade-in item opens.
8. In the Order Management tab, select the Returnable checkbox.
9. Optional: In the Order Management tab, uncheck the Customer Orders Enabled checkbox for obsolete or dummy trade-in items.
10. Click the Save icon in the toolbar to save the record.

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

3.1.3 Oracle Quoting - Forms

Oracle iStore is dependent on the setup of Oracle Quoting - Forms. See *Oracle iStore Implementation Guide* and *Oracle Quoting - Forms Implementation Guide* for more information.

3.1.3.1 Setting Up Payment Types

Oracle HTML Quoting displays payment types during checkout from the FND_LOOKUP_VALUES table for the Quoting- Forms lookup type ASO_PAYMENT_TYPE. The seeded values for ASO_PAYMENT_TYPE are credit card, cash, check,

purchase order, faxed credit card, and invoice. Oracle HTML Quoting displays all of the payment types that are in the lookup table.

See *Oracle Quoting - Forms Implementation Guide* for instructions on setting up the ASO_PAYMENT_TYPE lookup values.

3.1.3.2 Setting Up Quote Status Transitions

Sales representatives can create multiple versions of a quote for a customer. To enable the versioning functionality, you must set up Oracle Quoting - Forms to allow the quote status to transition from Drafted to Drafted.

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

Steps

1. Launch Oracle Forms by navigating to:
`http://<host>:<apache port>/`
and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).
2. Log in with the Order Capture Sales Manager responsibility.
3. Choose **Quote Status Setup**.
The Quote Status Setup window opens.
4. In the Quote Statuses region, select **Drafted**.
The Allowed Transition to Status region is populated with the quote statuses that can be assigned to a quote of Drafted status.
5. In the Allowed Transition to Status region, select **Drafted** from a Code field's list of values (LOV) if it is not already listed in the region.
6. Click the Save icon in the toolbar to save the record.

You can also use the Oracle Quoting Quote Status Setup window to modify other quote status transitions. See *Oracle Quoting - Forms Implementation Guide* for more information.

3.1.4 Oracle Order Management and Oracle Pricing

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

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

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

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

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

3.2 Conditional Dependencies

You can integrate Oracle HTML Quoting with Oracle Sales Online to extend its functionality.

3.2.1 Oracle Sales Online

Integrating Oracle HTML Quoting with Oracle Sales Online (OSO) provides Notes and Tasks functionality for Oracle HTML Quoting sales representatives. It also allows sales representatives to create quotes in a campaign-to-order work flow.

See *Oracle Sales Online Implementation Guide* for instructions on implementing OSO and setting up the Oracle HTML Quoting UI as part of OSO.

Set the IBE: Use Notes profile option to **Yes** to activate Notes functionality after OSO implementation.

Set the IBE: Use Tasks profile option to **Yes** to activate tasks functionality after OSO implementation.

See [Appendix A, "Profile Options"](#) for more information on profile options.

3.3 Installation and Dependency Verification

It is necessary to refer to the following documentation to ensure that all mandatory dependencies are installed, implemented, and set up correctly.

- *ERP Functional Checklist*

- *Implementing Oracle CRM: Foundation Functional Checklist*

Implementation Overview

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

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

4.1 Process Description

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

Implementing Oracle HTML Quoting involves the following tasks:

- Setting up the mandatory and optional Oracle application modules on which Oracle HTML Quoting depends
- Creating sales representative responsibilities and users
- Limiting ship-to and bill-to countries if necessary
- Setting profile options
- Set up GSA Pricing

4.2 Implementation Task Sequence

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

1. Define a Sales Representative responsibility.

Before you can approve employees or other personnel as sales representatives, you must define at least one responsibility to assign to them.

2. Set up sales representatives.

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

3. Create an employee record.

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

4. Create a user name for a sales representative.

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

5. Assign a sales representative role.

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

6. Import a CRM resource.

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

7. Limit the available countries (bill-to or ship-to).

Sales representatives use the Country pull-down menu to select the country of the customer, contact or address, when searching for and creating customers, contacts, and addresses. You can limit this menu if necessary.

8. Set up GSA Pricing.

GSA is a customer classification that indicates that the customer is a U.S. government customer. If you want HTML Quoting to detect GSA violations, you must set the necessary profile options.

9. Set up Automatic Site Numbering.

Automatic Site Numbering must be turned on for the create customer functionality to perform properly.

Implementation Tasks

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

- [Creating Oracle HTML Quoting Sales Representatives](#)
- [Setting Profile Options](#)
- [Limiting the Available Countries](#)
- [GSA \(General Services Administration\) Pricing](#)
- [Set up Automatic Site Numbering](#)

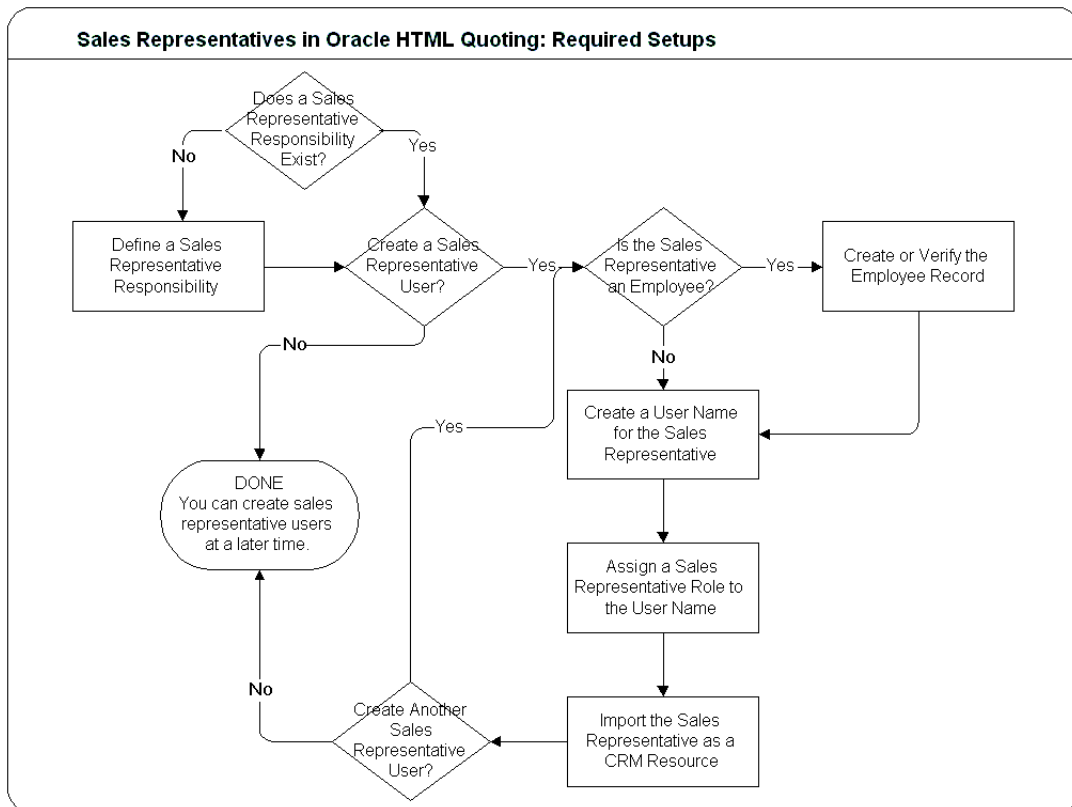
5.1 Creating Oracle HTML Quoting Sales Representatives

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

Use the following procedures to create sales representatives for Oracle HTML Quoting.

5.1.1 Process Flow for Required Sales Representative Setups

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



5.1.2 Defining a Sales Representative Responsibility

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

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

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

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

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

Login

Login to Oracle Forms.

Responsibility

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

Prerequisites

None

Steps

1. Launch Oracle Forms by navigating to:
`http://<host>:<apache port>/`
and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).
2. Log in with the System Administrator responsibility.
3. Choose **Security > Responsibility > Define**.
The Responsibilities form opens.

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

Note: Choose a clearly identifiable responsibility name.

5. Click the Save icon in the toolbar to save the record.
6. With your cursor in any field of the record, choose **Help > Diagnostics > Examine**.
The Examine Field and Variable Values window opens.
7. In the Examine Field and Variable Values window, choose **APPLICATION_ID** in the Field LOV.
The Value field in the Examine Field and Variable Values window is populated with the value of **APPLICATION_ID**. Note this value.
8. In the Examine Field and Variable Values window, choose **RESPONSIBILITY_ID** in the Field LOV.
The Value field in the Examine Field and Variable Values window is populated with the value of **RESPONSIBILITY_ID**. Note this value.
9. From the Navigator - System Administrator window, choose **Profile > System**.
The Find System Profile Values window opens.
10. Check **Site**, **Application**, and **Responsibility**. Use the Application LOV to choose **CRM Foundation**. Use the Responsibility LOV to choose **CRM Resource Manager**.
11. In the Profile field, enter `MO: Operating Unit`.
12. Click **Find**.
The System Profile Values form opens with the results of your search.
13. Note the value of the profile `MO: Operating Unit` at the CRM Resource Manager responsibility level. Optionally, you can change it.
If the profile is not set at this level, note its value at the CRM Foundation application level. Optionally, you can change it.
If the profile is not set at this level, note its value at the site level. Optionally, you can change it.

14. Choose View > Find.

The Find System Profile Values window opens.

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

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

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

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

with a user name that has the default responsibility IBE_ADMINISTRATOR and the default application iStore. (In other words, the user's JTF_PROFILE_DEFAULT_RESPONSIBILITY profile option is set to 21819, and the user's JTF_PROFILE_DEFAULT_APPLICATION profile option is set to 671).

21. In the Setup tab, click on the name link of the specialty store to which you want to assign the responsibility.

The Specialty Store Detail page opens.

22. Click Supported Responsibilities.

The Supported Responsibilities page opens.

23. Click Add Responsibility.

The Select Responsibility pop-up window opens.

24. In the Select Responsibility pop-up window, search for the sales representative responsibility that you want this specialty store to support by application and responsibility name, key, or description. Check the Select checkbox next to the responsibility, and click **Add**. When you are finished, click **Done**.**25. In the Supported Responsibilities page,** click **Update** to save your changes.

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

5.1.3 Setting Up Sales Representatives

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

You can set up sales personnel within your organization, value-added distributors and partners (VAD/Partner) of your organization, and anyone else who should be authorized to create quotes for your customers, as sales representatives.

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

Login

Login to Oracle Forms.

Responsibility

Each task below requires a different responsibility. Refer to the specific task for information on the responsibility.

Prerequisites

None

Steps

1. [Creating a User Name for a Sales Representative](#)
2. [Assigning a Sales Representative Role](#)
3. [Importing a CRM Resource](#)

If you are setting up an employee as a sales representative, you must first create a record of the employee before proceeding with these tasks. See [Section 5.1.4, "Creating an Employee Record"](#) for more information.

5.1.4 Creating an Employee Record

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

Login

Login to Oracle Forms.

Responsibility

To perform this task, you must use the Human Resources responsibility.

Prerequisites

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

Steps

1. Launch Oracle Forms by navigating to:
`http://<host>:<apache port>/`
and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).
2. Log in with the Human Resources responsibility.
3. Choose **People > Enter and Maintain**.
The Find Person window opens.
4. In the Find Person window, enter the search criteria for the employee and click **Find**.
5. If a record of the employee exists, the People form opens with the record.
Note the employee's number.
6. If a record of the employee does not exist, perform the following steps to create a record:
 - a. In the Find Person window, click **New** to create an employee record.
A blank People form opens.
 - b. In the People form, enter at least the employee's last name, social security number, and birth date.
 - c. Place your cursor in the Type field and click the LOV button.

The Person Types window opens.

- d. Highlight **Employee** and click **OK**.
- e. Click the Save icon in the toolbar to save this employee's record.
- f. Note the employee's number.

5.1.5 Creating a User Name for a Sales Representative

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

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

Login

Log in to Oracle Forms.

Responsibility

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

Prerequisites

You have defined a responsibility for sales representatives and noted its APPLICATION_ID and RESPONSIBILITY_ID. See [Section 5.1.2, "Defining a Sales Representative Responsibility"](#) for more information.

If you are setting up an Oracle HTML Quoting user name for an employee, a record of the employee must exist in Oracle Human Resources. See [Section 5.1.4, "Creating an Employee Record"](#) for more information.

Steps

1. Launch Oracle Forms by navigating to:

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

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

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

The Users window opens.

4. In the User Name field, enter the user name that the sales representative will use to log in to Oracle HTML Quoting.
5. In the Password field, enter the sales representative's password.
6. Place your cursor in the Person field or Customer field, depending on the resource category of the sales representative:
 - If the sales representative is an employee, choose the Person field.
 - If the sales representative is not an employee, choose the Customer field.
7. Use the LOV to search for and select the sales representative.
8. In the Responsibilities block, use the LOV button in a Responsibility field to assign a sales representative responsibility to the user name.
9. Click the Save icon in the toolbar to save this user record.
10. From the Navigator - System Administrator window, choose **Profile > System**.

The Find System Profile Values window opens.

11. Check the checkbox next to the User field, and use the LOV to search for and enter the sales representative's user name.
12. In the Profile field, enter `JTF_PROFILE%`.
13. Click **Find**.

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

14. Set the profile option `JTF_PROFILE_DEFAULT_APPLICATION` at the user level to the `APPLICATION_ID` value of the user name's sales representative responsibility.
15. Set the profile option `JTF_PROFILE_DEFAULT_RESPONSIBILITY` at the user level to the `RESPONSIBILITY_ID` value of the user name's sales representative responsibility.
16. Click the Save icon in the toolbar to save the records.

Guidelines

When assigning responsibilities to a sales representative, choose responsibilities that are associated with the operating units and specialty stores for which he or she should create quotes. If you want the sales representative to create quotes for all operating units, assign a responsibility that is associated with an operating unit

linked to the Master Inventory Organization. See *Oracle iStore Implementation Guide* for more information about defining the Master Inventory Organization in Oracle Inventory and associating responsibilities with operating units.

5.1.6 Assigning a Sales Representative Role

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

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

Login

Log in to Oracle CRM Applications.

Responsibility

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

Prerequisites

A user name for the sales representative exists. See [Section 5.1.5, "Creating a User Name for a Sales Representative"](#) for more information.

Steps

1. Log in as SYSADMIN to the Oracle CRM Applications login page at:
`http://<host>:<apache port>/OA_HTML/jtfllogin.jsp`
2. In the Users tab, choose **User Name** from the Find Users pull-down menu, enter the sales representative's user name in the adjacent text field, and click **Go**.

The Users page displays the sales representative's user name in the search results.
3. Click on the user name link.

The User Details page for the user name opens.
4. Click **Roles**.

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

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

5.1.7 Importing a CRM Resource

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

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

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

Login

Log in to Oracle Forms.

Responsibility

To perform this task, you must use the CRM Resource Manager responsibility.

Prerequisites

If you are importing an employee as a resource, a record of the employee must exist in Oracle Human Resources, and you should know the employee's number. See [Section 5.1.4, "Creating an Employee Record"](#) for more information.

A user name for the sales representative exists, and you have assigned a Sales Representative role to it. See [Section 5.1.5, "Creating a User Name for a Sales Representative"](#) and [Section 5.1.6, "Assigning a Sales Representative Role"](#) for more information.

Steps

1. Launch Oracle Forms by navigating to:
`http://<host>:<apache port>/`
and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).
2. Log in with the CRM Resource Manager responsibility.
3. Choose **Maintain Resources > Import Resources**.

The Selection Criterion window opens.

4. Choose **Employee, Partner, Supplier Contact, Party**, or another category from the Resource Category pull-down menu, as appropriate to the sales representative.
5. Optionally, you can enter other search criteria.
6. Optionally, if you are importing an employee resource, in the Number field, enter the employee number you noted when viewing or creating the employee's record.

7. Click **Search**.

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

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

The Default Values window opens.

10. Optionally, you can enter active dates, manager's name, and role information in this window.
11. Click **OK**.

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

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

The sales representative is now saved as a CRM Resource.

13. Click **Details**.

The Resource form for the sales representative opens.

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

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

5.2 Setting Profile Options

You must set certain Oracle iStore, Oracle Quoting - Forms, and Multi Organization profile options when implementing Oracle HTML Quoting. These profile option values affect the look and functionality of the application.

5.2.1 Setting Oracle iStore Profile Options

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

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

For a list of the Oracle Quoting - Forms profile options that you must set for Oracle HTML Quoting, see [Section A.1, "Oracle iStore \(IBE\) Profile Options"](#).

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

Login

Log in to Oracle Forms.

Responsibility

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

Prerequisites

None

Steps

1. Launch Oracle Forms by navigating to:

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

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

2. Log in as SYSADMIN.
3. Choose the System Administrator responsibility.
4. Go to **Profile > System**.
The Find System Profile Values window opens.
5. Check **Application** and **Responsibility**. Select **iStore** as the application and a sales representative responsibility as the responsibility.
6. In the Profile field, enter **IBE%**, and click **Find**.
7. Verify or set the iStore (IBE) profile options at the application level only, unless another level is specified.

5.2.2 Setting Multi Organization Profile Options

Use the following procedure to set up multi-organization profile options.

Login

Log in to Oracle Forms.

Responsibility

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

Prerequisites

None

Steps

1. Launch Oracle Forms by navigating to:
`http://<host>:<apache port>/`
and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).
2. Log in as SYSADMIN.
3. Choose the System Administrator responsibility.
4. Go to **Profile > System**.

The Find System Profile Values window opens.

5. Check **Site** and **Responsibility**. Select a sales representative responsibility from the Responsibility LOV.
6. In the Profile field, enter MO%, and click **Find**.
7. Verify or set the MO: Operating Unit profile option to the appropriate operating unit at the responsibility level or the value set at the site level is used.

5.3 Limiting the Available Countries

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

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

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

5.3.1 Limiting Bill-To Countries

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

Login

Login to Oracle Forms.

Responsibility

To perform this task, you must use the Human Resources responsibility.

Prerequisites

None

Steps

1. Launch Oracle Forms by navigating to:
`http://<host>:<apache port>/`
and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).
2. Log in with the Human Resources responsibility.

3. Choose Work Structures > Organization > Description.

The Find Organization window opens.

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

The Organization form opens with the organization's record.

5. In the Organization Classifications region, select Operating Unit in the Name fields.

6. Click Others.

The Additional Organization Information window opens.

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

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

The Additional Organization Information window for Bill to Country opens.

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

The Bill to Country window opens.

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

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

The Bill to Country search window opens.

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

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

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

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

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

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

5.3.2 Limiting Ship-To Countries

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

Steps

1. Launch Oracle Forms by navigating to:
`http://<host>:<apache port>/`
and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).
2. Log in with the Human Resources responsibility.
3. Choose **Work Structures > Organization > Description**.
The Find Organization window opens.
4. In the Find Organization window, enter the search criteria for your merchant organization and click **Find**.
The Organization form opens with the organization's record.
5. In the Organization Classifications region, select **Operating Unit** in the Name fields.
6. Click **Others**.
The Additional Organization Information window opens.
7. In the Additional Organization Information window, enter %Country in the Find field and click **Find**.
8. In the search results, choose **Ship to Country** and click **OK**.
The Additional Organization Information window for Ship to Country opens.
9. Place your cursor in a Ship to Country field.
The Ship to Country window opens.
10. Add countries to the Additional Organization Information window for Ship to Country as follows:
 - a. In the Ship to Country window, click the Ship to Country LOV button.
The Ship to Country search window opens.
 - b. Search for a country, highlight it, and click **OK**.

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

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

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

5.4 GSA (General Services Administration) Pricing

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

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

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

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

5.5 Set up Automatic Site Numbering

The ability to create addresses in Oracle HTML Quoting relies on the setting of Automatic Site Numbering in Oracle Receivables. Automatic Site Numbering must be turned on for the user to create addresses.

Login

Log in to Oracle Forms.

Responsibility

To perform this task, you must use the Receivables Manager responsibility.

Prerequisites

None

Steps

1. Launch Oracle Forms by navigating to:
`http://<host>:<apache port>/`
and clicking on **Apps Logon Links > VIS Logon** through the Forms cartridge (UNIX).
2. Log in using the Receivables Manager responsibility.
3. Choose **Setup > System > System Options**.
The System Options form opens.
4. Click on the Trans and Customers tab.
5. Make sure the Automatic Site Numbering box, located in the Customers section, is checked.
6. Click save and close the form.

Verifying the Implementation

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

- [Oracle HTML Quoting Implementation Verification Tasks](#)

6.1 Oracle HTML Quoting Implementation Verification Tasks

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

For information on the procedures necessary to perform these tasks, see *Oracle HTML Quoting Concepts and Procedures*.

1. Create a complex quote.
 - Create a new customer for your quote.
 - Add and configure a model item.
 - During the checkout process, create a new contact for the customer.
 - During the checkout process, create a shipping or billing address for the customer.
2. Submit the order.

If the submission process was a success, you receive confirmation from Oracle Order Management.

Diagnostics and Troubleshooting

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

- [Order Feedback Queue Frequently Asked Questions](#)

7.1 Order Feedback Queue Frequently Asked Questions

Question: The queue table ASO_ORDER_FEEDBACK_T is growing in size. How do I stop it from growing?

Answer: Log in to Oracle Forms using the Oracle Order Capture Sales Manager responsibility and navigate to QuickCodes. Delete or disable all the lookup entries for lookup 'ASO_ORDER_FEEDBACK_CRM_APPS'.

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

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

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

Answer: Perform the following tasks:

- Log in to Oracle Forms using the Oracle Order Capture Sales Manager responsibility and navigate to QuickCodes. Delete or disable all the lookup entries for lookup 'ASO_ORDER_FEEDBACK_CRM_APPS'.
- Apply ARU bug 1449198 which drops the queue table and recreates it.

Question: The Installed Base Interface Concurrent Program completes with an error status with a fatal exception from the ASO_ORDER_FEEDBACK_GET_PVT API. FND_AS_UNEXPECTED_ERROR (PKG_NAME=ASO_ORDER_FEEDBACK_GET_PVT) (PROCEDURE_NAME=GET_NOTICE) (ERROR_TEXT=ORA-00600: internal error code, arguments: [koxsi2sz1], [13], [], [], [], [], [], []). What does this mean?

Answer: This error occurs because of bug 1424051 in RDBMS. Customers have to apply a patch to avoid this problem. The only workaround is to drop the rows in

the table. For this, a standalone ARU 1449198 needs to be applied which will drop and recreate the queue.

Question: Bug 1816891: Placing an order in OM or OC throws the error: FND_AS_UNEXPECTED_ERROR (PKG_NAME=ASO_ORDER_FEEDBACK_UPDATE_PVT) (PROCEDURE_NAME=UPDATE_NOTICE) (ERROR_TEXT=ORA-25207: enqueue failed, queue ASO.ASO_OF_Q is disabled from enqueueing). Why does this happen?

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

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

Question: Bug 1897375: Placing an order in OM or OC throws an error: 100501 - non-Oracle Exception. The debug file shows the error: FND_AS_UNEXPECTED_ERROR (PKG_NAME=ASO_ORDER_FEEDBACK_UPDATE_PVT) (PROCEDURE_NAME=UPDATE_NOTICE) (ERROR_TEXT=ORA-06502: PL/SQL: numeric or value error: character to number conversion error). Why does this happen?

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

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

A

Profile Options

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

- [Oracle iStore \(IBE\) Profile Options](#)
- [Multi Organization \(MO\) Profile Options](#)

A.1 Oracle iStore (IBE) Profile Options

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

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

Verify or set the HTML Quoting specific iStore (IBE) profile options listed below at the application level only, unless another level is specified.

Table A-1 IBE Profile Options for Oracle HTML Quoting

Name	Description
IBE: Attachment Document Category	This profile option specifies the default attachment category ID, to make Oracle HTML Quoting quote attachments accessible in Oracle Order Management and Oracle Quoting - Forms. This attachment category ID must also be enabled in Oracle Order Management and Oracle Quoting - Forms.
IBE: Search Operator	This profile option specifies the operator for search keywords in Oracle HTML Quoting. If the profile option is set to AND , product searches return results that include all of the keywords. If the profile option is set to OR , product searches return results that include any of the keywords. The default value is OR .
IBE: Use Line Types	This profile specifies whether sales representatives can modify line types for items in quotes. A sales representative marks an item as a trade-in by setting its line type to the Line Category Return , so this profile value determines whether Oracle HTML Quoting's trade-in functionality is available. Yes enables line type changes and consequently trade-in functionality. No disables line type changes and trade-in functionality. If the profile is not set, it defaults to No . Note: If you want to enable this profile option, make sure the profile option ASO: Default Order Type is set to Mixed .
IBE: Use Notes	This profile specifies whether to turn on the Notes functionality in Oracle HTML Quoting. Yes activates the Notes functionality. No deactivates it. The default value is No . OSO must be installed before the Notes functionality can be activated.

Table A-1 IBE Profile Options for Oracle HTML Quoting

Name	Description
IBE: Use Quote Publishing	<p>This profile option enables the publishing functionality in Oracle HTML Quoting. The default value is No.</p> <p>This profile option is not used for HTML Quoting in this release.</p>
IBE: Use Support	<p>This profile option determines whether service items are supported. If the profile option is set to Yes, user of service items is supported. If it is set to No, service items are not supported. The default value is No.</p>
IBE: Use Support Cart Level	<p>This profile option allows users to choose a service support level for the entire cart, rather than by item. This profile option cannot be activated unless IBE: Use Support is also set to Yes.</p> <p>The default value is No.</p>
IBE: Use Tasks	<p>This profile specifies whether to turn on the Tasks functionality in Oracle HTML Quoting. Yes activates the Tasks functionality. No deactivates it. The default value is No.</p> <p>OSO must be installed before the Tasks functionality can be activated.</p>
IBE: View Custom Quote Line Details	<p>This profile option enables the Custom link on each quote line in Oracle HTML Quoting. The default value is No.</p>

The following iStore profile options must also be set during implementation. Refer to *Oracle iStore Implementation Guide* for more information.

- IBE: Authorize Payment Offline during normal Checkout
- IBE: Create Order in Entered State, if it has errors while booking
- IBE: Enable Debug
- IBE: Enable Fuzzy Search
- IBE: Merge Shopping Cart Lines
- IBE: No of Results in Search
- IBE: Pricing Event — Before Shopping Cart
- IBE: Pricing Event for Shopping Cart
- IBE: Recalculate Price in Order Management
- IBE: Request Type to get a Price
- IBE: Search Lines Per Page

- IBE: Shopping Cart Expiration Duration
- IBE: Use Category Search
- IBE: Use Price list associated with Specialty Store

A.2 Multi Organization (MO) Profile Options

Verify or set the MO: Operating Unit profile option to the appropriate operating unit at the responsibility level.

B

Seeded Roles

This appendix describes the seeded roles and permissions included in Oracle HTML Quoting.

- [The Sales Representative Role and Permissions](#)

B.1 The Sales Representative Role and Permissions

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

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

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

Table 7–1 Permissions for IBE_SALESREP_ROLE

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

Table 7-1 Permissions for IBE_SALESREP_ROLE (Cont.)

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

Glossary

B2B customer

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

B2C customer

An individual customer who represents only himself or herself.

blueprint phase

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

complementary sell

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

construction phase

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

cookie

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

cross-sell

See Complementary sell.

Demilitarized zone (DMZ)

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

drafted

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

firewall

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

flexfields

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

inactive

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

launch phase

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

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

ordered

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

OSO

Acronym for Oracle Sales Online.

quote

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

quote status

The quote status indicates the stage of preparation that a quote is in. Possible quote statuses include [drafted](#), [ordered](#), and [inactive](#).

Sales Representative Role

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

Secure Electronic Transaction

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

settling transactions

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

transactional data

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

upsell

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

VAD/Partner

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

wildcard

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

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

Index

A

architectural overview, 2-2

C

country

 limiting, 5-15

 limiting bill-to, 5-15

 limiting ship-to, 5-17

CRM Resource, 5-11

D

dependencies

 conditional, 3-6

 mandatory, 3-2

E

employee record, 5-7

G

GSA pricing, 5-18

H

hardware requirements, 2-2

I

implementation

 tasks, 5-1

 verifying, 6-1

N

new in release, 1-2

notes, 3-6

O

Oracle Inventory, 3-3

 setting up, 3-3

 trade-in items, 3-3

Oracle iStore, 3-2

 permissions, 3-2

 profile options, A-2

 shopping cart, 3-2

 specialty stores, 3-2

Oracle Order Management, 3-5

Oracle Pricing, 3-5

Oracle Quoting - Forms, 3-4

 quote status transitions, 3-5

Oracle Sales Online, 3-6

 notes, 3-6

 tasks, 3-6

P

permissions

 sales representative, B-2

pricing

 GSA, 5-18

pricing agreements, 3-5

profile options

 multi organization (MO), 5-14

 Oracle iStore (IBE), A-2

Q

quoting

- features, 1-2
- overview, 1-2

R

responsibility, 5-3

S

sales representative

- assigning Sales Representative role, 5-10
 - defining responsibility, 5-3
 - employee record, 5-7
 - importing as CRM Resource, 5-11
 - permissions, B-2
 - setting up, 5-6
 - setup process flow, 5-2
 - user name, 5-8
- Sales Representative role, B-2
- assigning, 5-10
- software requirements, 2-2

T

tasks, 3-6

U

user name, 5-8